ANNUAL EQUIPMENT INVENTORY – FY 2019

AUGUSTA UNIVERSITY
LOGISTICS AND PROPERTY MANAGEMENT
ANNUAL EQUIPMENT INVENTORY – FY 2019

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https://www.augusta.edu/supply/property/index.php
Overview

- Requirements and Regulations
- Property Disposal Methods
- Inventory Schedule
- Inventory Procedure
- Questions
Requirements & Regulations
11.1 State Requirements For Equipment Inventory

The University System of Georgia is required to keep an equipment inventory of all items that are non-consumable and non-expendable in nature, having a life expectancy of three or more years, and an item acquisition cost of $3,000 or more. Examples of these items are:

- Motor vehicles
- Mechanized and non-mechanized equipment
- Office equipment
- Appliances

Institutions may also include any item or items not meeting these criteria that it desires to have included in the inventory for valid management reasons.

http://www.usg.edu/business_procedures_manual/section11/C1417
11.4 Mandatory Physical Equipment Inventory Requirements
(Last Modified on February 8, 2015)

All institutions within the University System of Georgia must conduct a mandatory physical equipment inventory annually. The results of this inventory will be updated into the equipment inventory systems utilized by the institution to satisfy state reporting requirements. These results should change the status or condition of the item if required, such as missing or poor condition.

When the data file is submitted as of the end of the fiscal year, each item contained in the file should have been part of a physical inventory during that fiscal year. This allows for periodic physical inventories to be conducted on small segments of the institution’s property throughout the fiscal year to eliminate the need for conducting a complete inventory during the last month of the fiscal year.

http://www.usg.edu/business_procedures_manual/section11/C1420
Surplus property disposal is governed by law and is set forth in the Official Code of Georgia Annotated (O.C.G.A.), 50-5-140 through 50-5-146. 
§ 50-5-146. Penalty

Any person who causes state property having a value of less than $200.00 to be disposed of in violation of this article shall be guilty of a misdemeanor. If such property has a value of $200.00 or more, he or she shall be guilty of a felony and, upon conviction thereof, shall be punished by imprisonment for not less than one year nor more than five years.
Property Disposal Methods
How can I dispose of my property?

If your property has an original cost of $20 or more, and is not a consumable item (i.e. paint, office supplies, or tires) you must use the Surplus Property Disposal option. Submit a moving request form to AUMoving@augusta.edu and our movers will pick it up and transport it to Surplus Property. Once received, it will be transferred off your inventory and on to ours.

What happens to the property once Moving Services picks it up?

Property Control decides if the property should be held for internal redistribution or disposed of through the DOAS Property Disposal methods. Many items are held at the warehouse and can be viewed daily from 8:00 – 8:30 a.m. and 1:00 – 1:30 p.m.

https://www.augusta.edu/supply/property/map.php
What happens to property that is not held for redistribution?

There are several methods of disposal we utilize:

- Transfer to another USG school.
- Direct Negotiated Sale of property to other state affiliated agencies and local government.
- Authorized Disposal by recycling or trash.
- Electronic Disposal by authorized state vendor.
- Retail Sale of select items.
- Vendor Return or Trade-In of equipment for new, like items.
Trade-In Procedure and Vendor Return

• Perform a cost analysis to justify the trade-in.
• Obtain a quote from the vendor which lists the new property being purchased and the old property being traded in.
• The trade-in must be a separate line item and must include the make, model, and serial number of the equipment.
• Contact Property Control to request trade-in authorization. Provide the quote, the justification, and the following specific information:

  Receiving company Name    Equipment Description  
  Receiving company Address  Equipment Serial Number  
  Receiving company Contact   Equipment Model  
  Receiving company Phone    Equipment Acquisition Cost  
  Receiving company Email    Equipment Asset #  

• Property Control will submit request to DOAS for authorization.
• DOAS may opt to reallocate the equipment instead of authorizing trade-in.
• Once authorization is obtained, Property Control will notify department and AM.
ANNUAL EQUIPMENT INVENTORY – FY 2019

Inventory Schedule
ANNUAL EQUIPMENT INVENTORY – FY 2019

Inventory Schedule

• Campus Inventory from January 14 – April 15
  Group 1      Jan 14 – Feb 15     Due by 4 pm Feb 15
  Group 2      Feb 18 – Mar 15     Due by 4 pm Mar 15
  Group 3      Mar 18 – Apr 15     Due by 4 pm Apr 15

• Compliance Report due the week following each group’s submission deadline

• Audit - 10% of the assets in each group will be audited by the Property team

• Re-inventory and re-audit as needed until 100% correct

• Final check and final submission to BOR by year end (June 30)
Inventory Procedure
What do I need to do?

1. Run current inventory report.
2. Physically locate and verify each item and identify any changes that should be made.
3. Update locations and custodians in People Soft. (if needed)
4. Re-run current inventory report, after changes, and format per instructions.
5. Identify any further actions needed and record on the submission form.
6. Gather any documentation needed to support further actions.
7. Print and sign your name.
8. Have the department manager, head, chair or VP verify, and print and sign.
9. Submit one file with the inventory submission and supporting attachments via email.
How do I run the report?

- In PeopleSoft Financials, go to: Nav Bar > Navigator > Reporting Tools > Query > Query Manager (or Query Viewer)

- Find the query: 120_AM_CAMPUS_INV_DEPT_SUBMIT

- Click on the button to run to Excel. Enter your department ID. View results.

- Use this spreadsheet to conduct your Physical Inventory.

- Enter location and custodian changes into PeopleSoft.

- Once all location changes have been made, re-run the query.

- Identify any further actions that are needed from Property Control and mark each item as correct or not correct.
120_AM_CAMPUS_INV_DEPT_SUBMIT

**Query Manager**

Enter any information you have and click Search. Leave fields blank for a list of all values.

- **Find an Existing Query** | **Create New Query**

**Search By**

- **Query Name**

 begins with

**Search Results**

- **Folder View**

**Action**

- **Choose**

**Query**

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**Personalize**

- **Folder** COMP INV
- **Owner** Public
- **Run to** HTML, Excel, XML

**View Results**

**Dept ID**

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**Lookup References**
## ANNUAL EQUIPMENT INVENTORY – FY 2019

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How do I remove the duplicates?

• On the Excel file, select all.

• Click on the Data tab. Select Remove Duplicates.

• Click ‘Unselect All’ and ‘My data has headers’. Then select ‘Asset ID’. Click ‘OK’.

• You will get a message that the duplicate lines have been removed.
How do I make changes to locations and custodians?

- In PeopleSoft Financials, go to: Nav Bar > Navigator > AU Components > AU Utilities > Use > AU Inventory

- Clicking on Search will return a list of assets assigned to you, up to 300.

- You can click on the hyperlinked Asset ID number to select the asset, or you can use one of the other search functions. (i.e. tag number)

- Select the asset you wish to view and the next screen will be where you can update the custodian and/or the location. Click the ‘+’ in each section before making a change. Save your changes!

- Changes made in this component are updated in batches. Please allow at least 12 hours to make sure the batch process has run before you can expect to see the change reflected on your report.

- Once you have made all of your location changes, and waited for the batch update, you will then re-run the query and verify all the information is now correct.
NAVIGATOR ➔ AU COMPONENTS ➔ AU UTILITIES

- Navigator
- My Favorites
- Expenses
- My Preferences
- Classic Home

**NavBar: Navigator**
- Recent Places
- AU Components
- Employee Self-Service
- Manager Self-Service
- Supplier Contracts
- Suppliers

**NavBar: Navigator**
- Recent Places
- AU Components
  - AU Interfaces Reports
- My Favorites
  - AU Utilities
USE → AU INVENTORY
NOTE: This will only return 300 items. If your inventory is larger, you will need to use the ‘search by’ box to find by asset ID or tag number.
NOTE: The system does batch updates throughout the day. Updates will not immediately show.

### AU Inventory

Enter any information you have and click Search. Leave fields blank for a list of all values.

#### Search Criteria

Search by: **Asset Identification** begins with

**Find an Existing Value**

**Search**  **Advanced Search**

#### Search Results

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<td>12000</td>
<td>096027</td>
<td>(blank)</td>
<td>SYSTEM PURIFICATION WATER MILL</td>
<td>Property</td>
</tr>
<tr>
<td>0000000007399</td>
<td>12000</td>
<td>88183</td>
<td>(blank)</td>
<td>HARVESTER BRANDEL CELL WITT-24</td>
<td>Property</td>
</tr>
</tbody>
</table>
Update Custodian and/or Location

NOTE: Click the “+” sign to add a record before changing.
ANNUAL EQUIPMENT INVENTORY – FY 2019

How do I format my inventory for submission?

1. Remove line 1. (Submit for Campus Phy Inven)
2. Select all and adjust the column width so that all data shows clearly.
4. Change orientation to landscape.
5. Select Page Setup and “Fit to” and make it one page wide by any number of pages tall.
6. For multiple pages, select the sheet tab and “Rows to Repeat at top”. Select the row headings and press enter.
7. Add a section for signatures.
8. Make sure each line is marked as either “YES” or “NO” and if no, be sure to include what action you need Property Control to take.
9. Preview your document. You should be able to clearly see all data, on one page wide. Once everything is correctly formatted, be sure to save!
10. Sign (and print) as the Assistant Equipment Control Officer and get your manager to sign (and print) as well.
11. Scan the signed inventory and any documentation into a .pdf file.
ANNUAL EQUIPMENT INVENTORY – FY 2019
### ANNUAL EQUIPMENT INVENTORY – FY 2019

Before you submit...

Make a selection and mark either ‘Correct? YES’ or ‘Correct? NO’

If you mark ‘Correct? NO’, use the ‘What Action is Needed?’ column to explain.
If you mark ‘Correct? YES’, leave the ‘What Action is Needed?’ column blank.

<table>
<thead>
<tr>
<th>Location</th>
<th>Tag Number</th>
<th>Descr</th>
<th>Dept</th>
<th>Cost</th>
<th>Serial ID</th>
<th>PO No.</th>
<th>Acq Date</th>
<th>Asset ID</th>
<th>Correct? YES</th>
<th>Correct? NO</th>
<th>What Action is Needed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>PZ1000</td>
<td>G00196</td>
<td>Sharp AR275 Copier</td>
<td>30500030</td>
<td>6511.580</td>
<td>000006635</td>
<td>7/29/2003</td>
<td>00A00004879</td>
<td>X</td>
<td></td>
<td>Update serial # to: 35004875</td>
<td></td>
</tr>
<tr>
<td>PZ1000</td>
<td>G00164</td>
<td>CSV T Vale Terminal JAGCard Swi</td>
<td>30500030</td>
<td>9185.000</td>
<td>000014898</td>
<td>7/15/2005</td>
<td>00A0005355</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PZ1000</td>
<td>CSVT (Value Transfer Terminal)</td>
<td>30500030</td>
<td>9020.000</td>
<td>M653267</td>
<td>000014301</td>
<td>6/12/2005</td>
<td>00A0005341</td>
<td>X</td>
<td>needs to be tagged</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PZ1000</td>
<td>G00073</td>
<td>Copier, Konica Minolta Bizhub</td>
<td>30500030</td>
<td>7414.000</td>
<td>31132609</td>
<td>4/22/2008</td>
<td>00A0005655</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PZ1000</td>
<td>B00070</td>
<td>HP LaserJet 5550dtn color prin</td>
<td>30500030</td>
<td>3875.000</td>
<td>JPSC7D951P</td>
<td>8/1/2008</td>
<td>00A0005694</td>
<td>X</td>
<td>Surplus. Move request attached.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Annual Equipment Inventory – FY 2019**

**Before you submit...**

Do not fill in any blanks on the submission form. Use only the last three columns to identify updates.

Resize the columns to eliminate any unneeded space and to show all information in the cells.

Do not add any colors. Our printer is black and white and colors don’t show on the final print.

Add a section for approvals at the bottom of the submission form. This should include the printed and signed names for the Assistant Equipment Control Officer that has performed the inventory and the department manager (or department head/chair (or VP) who is certifying it).
A Few Final Notes....

Assistant Equipment Control Officers make the changes to locations and custodians.

Please make **one submission form per department ID**. (Even if you are responsible for more.)

The department manager/head/chair or VP must sign. Two names are required; signed and printed.

Transfers require a signed move request between the two departments or an email agreement with both parties included and acceptance indicated.

Equipment Loan Agreements should be included only for those items >$3000 and showing up on your inventory. All others should be kept at the department level.

Any items not located will require a lost/stolen form and a police report.

If you have tagged assets in your department that do not show up on your inventory report, please report these on a separate page so they can be researched. They should show up on someone else’s report as missing.
Helpful Links

Custodian Form

Lost / Stolen Report

Loan Agreement
http://www.augusta.edu/supply/forms/documents/equipment-loan-agreement_rev_01172019.pdf

People Soft Security Access

Moving Request / Transfer Form

Event Setup Request Form
https://www.augusta.edu/supply/forms/documents/special-event-setup-form02082018.pdf
ANNUAL EQUIPMENT INVENTORY – FY 2019

- Failure to follow Property Control Policies and Procedures may result in disciplinary action ranging from counseling, to written reprimands, to further action up to and including dismissal from employment.

- Completed inventories, transfer requests, equipment loan agreements, and questions should be directed to: AUINVENTORY@augusta.edu.

- If you need help with anything, please contact us for assistance:

  Property Control: Sharon Bradish  
  Dina Wright  
  Property Control  
  Office: 706-721-9674  
  Office: 706-446-5179  
  Office: 706-721-1797

  Asset Management: Tamisha Thomas  
  Office: 706-721-4116
ANNUAL EQUIPMENT INVENTORY – FY 2019

• What to submit:
  Inventory Spreadsheet
  Moving Request Forms to Document transfer to Surplus
  Email or Other Documentation for Transfer Approval
  Lost/Stolen Item Report to Document as Missing
  Loan Agreements for assets >$3000

• Where to submit:
  Email to AUINVENTORY@AUGUSTA.EDU

• When to submit:
  Final inventory for GROUP 1 is due by 4 pm, February 15
  Final inventory for GROUP 2 is due by 4 pm, March 15
  Final inventory for GROUP 3 is due by 4 pm, April 15
Questions?