I: INTRODUCTION

- Capital assets are those assets with a value of $5000.00 or more and controlled assets are those assets with a value greater than $500.00 to $4,999.99.
- All computers and tablets are considered controlled assets regardless of the cost due to containing sensitive information.
- The Asset Management (AM) module creates a record of all property that has been purchased, is in use, or has been disposed of by The University.
- Business processes such as annual inventory, updating critical record fields and transfer of assets will be involved during the asset lifecycle.
- University assets will be classified into 3 categories (MTD, Stationary, Off-site) to be validated.
- OnBase is the document imaging system used by the Property Department to store transactional documentation for department reference.

II: NEW RESPONSIBILITIES

**Department Manager:** Responsible official appointed by the Dean or Department Head for each Area ID

**Custodial Contact:** Primary Area ID contact for property administration

**Custodian:** Individual assigned responsibility for University property

**Property Administration:** Responsible for assets from purchase order to disposal
INVENTORY PROCEDURES

Department Manager Responsibilities
- Responsible for the proper custody, maintenance and safekeeping of UTD property assigned to his/her department.
- The department manager or his/her appointee can act as departmental property manager; however, responsibility for property rests with the department manager.
- Responsible for maintaining all documentation required to support departmental assets during their lifecycle.

Custodial Contact Responsibilities
- Responsible for controlling, maintaining and monitoring all Controlled and Capital assets that are assigned to their Area ID.
- Maintain the Custodian information for laptops and tablets.
- Perform annual inventory, audits, transfer assets between departments and submit Missing/Stolen Reports when necessary.
- Perform all duties assigned by the department manager to maintain property records and follow all procedures.

Custodian Responsibilities
- Responsible for the proper custody, maintenance and safekeeping of UTD property assigned for their use.
- It is the responsibility of each user to report when an asset is lost, missing, broken, or needs repairs.

Chris Rench
Director, Logistics & Distribution
rench@utdallas.edu
972.883.3508

Donald Stephens
Supervisor, Property Logistics
dons@utdallas.edu
972.883.6421

Robert Taylor
Manager, Property Distribution
rwt091000@utdallas.edu
972.883.2779

Greg White
Chief Clerk II
gvwhite@utdallas.edu
972.883.2150

Cary Myers
Chief Clerk II
cary.myers@utdallas.edu
972.883.6423

Clark Palomino
Chief Clerk
2323@utdallas.edu
972.883.6428

Bill Shaffer
Chief Clerk II
william.shaffer@utdallas.edu
972.883.6061
Property Administration Responsibilities

Inventory
- Maintain asset records and update records when necessary.
- Conduct and coordinate annual Scan & Validate inventories.
- Track Missing and Stolen assets.
- Transfer assets between departments.
- Respond to emails in a timely manner.
- Produce reports for departments as requested.
- Prepare inventory progress reports for Provost and VP’s.

Surplus
- Maintain asset records and update records when necessary
- Pick up items from departments upon request and move them to Surplus.
- Responsible for the custody and safekeeping of all items in Surplus until they are sold.

Distribution
- Receive all freight into receiving warehouse, tag and deliver them to departments.
- Respond to emails in a timely manner.
- Preview all purchase orders for accuracy and make necessary corrections.

III: PROCEDURES AND PROCESSES

How to code a purchase order in SciQuest
- Account Codes starting with 5 digits are standard assets.
- Account Codes starting with 5, and are 6 digits, are for assets without a physical tag, such as artwork, furniture, and software.

Identify all P-Card asset within 48 hours
- Email to inventory@utdallas.edu to inform of this purchase.
- Attach a copy of the receipt and the cost center that this unit will be charged to.

Provide the Custodian name and UTD employee ID upon receipt of laptop/ tablet by email inventory@utdallas.edu.
IV: INVENTORY CONTROL PROCEDURES

Mobile Technology Device (MTD) Validation
Stationary Asset Validation
Off-site Asset Validation
Scanning Options
Inventory Validation Email

Asset Classification

<table>
<thead>
<tr>
<th>Asset Classification</th>
<th>Definition</th>
<th>Method of Validation</th>
<th>Type of Validation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Stationary Assets</td>
<td>Any asset remaining in stationary location for daily use</td>
<td>Scan and Validate</td>
<td>Location</td>
</tr>
<tr>
<td>2 Mobile Technology Devices</td>
<td>Any asset subject to frequent movement on or off campus</td>
<td>Department provided spreadsheet</td>
<td>Custodian Name and UTD ID</td>
</tr>
<tr>
<td>3 Permanently Off Campus Assets</td>
<td>Any asset permanently located at a site not owned or leased by the University</td>
<td>Email</td>
<td>Physical Location, Name and UTD ID of Employee</td>
</tr>
</tbody>
</table>

MTD Validation

- A mobile asset validation Report will be sent prior to the beginning of your inventory.
- The report will contain tag number, location, asset description, model, serial number, custodian name and UTD Employee ID.
- Use the column New Custodian and New Employee ID numbers to make necessary changes.
- Type missing in new employee column if the asset is missing this year.
- Custodian name should be the person’s proper legal name, i.e., no nickname.
- The report must be routed through the Dean, then submitted to Inventory in excel format.

Stationary Asset Validation

All stationary assets will be validated using the barcode scanner used by the inventory staff or by department custodian if the department chooses to perform the inventory.
INVENTORY PROCEDURES

Off-site Asset Validation
- Off-site assets are assets owned by The University but stored and utilized at a location other than The University.
- Same procedures as MTD.
- We need a permanent address, responsible University official and employee ID. This can be done through e-mail with spreadsheet attached as well.

Scanning Options
- The department has the option of having our inventory team perform the scanning or doing the scanning themselves.
- We recommend that the inventory team perform the inventory due to being more proficient with the scanner and knowing all of the procedures.
- If Scan and Validate team is used, departmental responsibility includes facilitating entry into all areas.

Inventory Validation Email
- An email will be sent to certify that your inventory is completed when all requirement for the annual inventory have been met.
- Please keep this email for your records.

V: TRANSACTIONAL PROCESSES

Transfer of Assets
Turn Assets in to Surplus
Request Updates
Report Missing/Stolen Asset

Transfer of Assets
- We are no longer using most forms. All transfers will now be completed via email.
- Send an email containing the tag number and short description to the inventory department and route through your department head and custodial contact.
- Once the department approves the transfer, they forward the email to inventory@utdallas.edu, with the Department Manager copied.
- Inventory will transfer the assets and send a confirmation email reply when transfer is complete.
- The transfer email will be kept in OnBase for future reference by both gaining and losing department.
INVENTORY PROCEDURES

Turn Assets in to Surplus
- All the requests will be completed via email for Technology Recovery items.
- Send an email to surplus@utdallas.edu listing the tag number, description, area ID and quantity.
- Do not remove the hard drive of the technology devices. Please make a statement via email if you remove the hard drive for some reason.
- Surplus will contact you to set up an appointment for pick up.
- A confirmation email will be sent to you confirming pick up.
- Keep these confirmation emails for your records.
- Contact Surplus if you don’t receive a confirmation email.
- We do not pick up assets other than Technology Recovery items (desktop computers, printers and mobile technology devices)
- All other items must be picked up by Facilities Management (FM). Contact FM and "CC" Surplus for any assets other than the smaller technology assets (desktops, laptops, tablets, etc.).

Requesting Updates
- We will process any request for updates as quickly as possible.
- An email can be sent to inventory@utdallas.edu for any request for updates, reports, etc.

Report Missing/Stolen Asset
- Missing/Stolen report is the only paper form still in use due to state requirements.
- A police report must be filed and submitted with the assigned Missing/Stolen report if an asset is suspected of being stolen.
- A missing report will only need to be submitted the first year that the asset is reported missing.
- Each missing item must have its own missing report.