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# Definition of Responsibilities

1. Department Manager-Responsible official appointed by the Dean or Department Head for each Area ID
2. Custodial Contact-Primary Area ID contact for property administration
3. Custodian-Individual assigned responsibility for University property
4. Property Administration-Responsible for assets from purchase order to disposal

# 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 ensuring that all department assets are validated annually.
- Responsible for ensuring that all items, missing from department inventory are thoroughly researched, act as signature authority for all missing reports.

# 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.
- Responsible for maintaining all documentation required to support departmental assets during their lifecycle.

# 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, relocated or needs repairs

# Property Administration Responsibilities

## LOGISTICS

- Preview all purchase orders for accuracy and make necessary corrections.
- 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.
- Prepare inventory progress reports for Provost and VP'S.

## Distribution

- Receive all freight into receiving warehouse, tag and deliver them to departments.
- Maintain asset records and update records when necessary
- Pick up technology recovery devices from departments upon request and move them to Surplus.
- Respond to emails in a timely manner.
- Responsible for the custody and safekeeping of all items in Surplus until they are sold.

# Procedures and Processes

- Identify all P-Card asset within 48 hours

Email to [Inventory@utdallas.edu](mailto: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 encrypted

Email to [Inventory@utdallas.edu](mailto:Inventory@utdallas.edu), **Employee ID's must be sent by encrypted email for security reasons.**

# Inventory Control Procedures

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



# Asset Classification

Asset Classification	Definition	Method of Validation	Type of Validation
Stationary Assets	Any asset remaining in stationary location for daily use	Scan and Validate	Location
Mobile Technology Devices	Any asset subject to frequent movement on or off Campus	Department provided spreadsheet	Custodian Name and UTD ID
Permanently off Campus Assets	Any asset permanently located at a site not owned or leased by the University	E-mail	Physical location, Name and UTD ID of employee
Unresolved	Any asset not validated by one of the three validation methods	Missing Report	

# 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.
- You must have your computer set up to receive/send encrypted emails due to this spreadsheet containing employee ID #'s.
- 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 Property 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.

# 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.
- Note: since employee name and UTD ID are needed, please ensure your email is sent encrypted.

## 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.

## Unsolved Assets

- Unsolved assets are assets not validated by one of the three validation methods

# FY14 Cyclical Inventory Schedule

Inventory Period	Functional Area
September - February	Provost
March	VP Student Affairs
April	The President Security Administration VP Public Affairs VP Research VP Development and Alumni Relations VP Communications VP and CIO Information Resources VP Diversity and Community Engagement
May/June	VP Administration VP Budget and Finance

# Transactional Processes

- Transfer of Assets
- Turn into 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 property departments and routed through your department head.
- Once the department approves the transfer they forward the email to [Inventory@utdallas.edu](mailto:Inventory@utdallas.edu), with the Department Manager copied.
- Property 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.

# Turn Assets into Surplus

- All the requests will be completed via email for Technology Recovery items.
- Send an email to [Surplus@utdallas.edu](mailto:Surplus@utdallas.edu) listing the tag number, description, area ID and quantity.
- We recommend you not remove the hard drive of the technology devices. Please make a statement via email if you remove the hard drive.
- 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 Moving Services utilizing the existing pick up form.



# Requesting Updates

- We will process any request for updates as quickly as possible.
- An email can be sent to [Inventory@utdallas.edu](mailto:Inventory@utdallas.edu), Greg White at [gvwhite@utdallas.edu](mailto:gvwhite@utdallas.edu), Don Stephens [dons@utdallas.edu](mailto:dons@utdallas.edu) and Rick Nelson at [rbn061000@utdallas.edu](mailto:rbn061000@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.