Property Dashboard

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What is Property Accounting?
- Responsible for tagging, tracking and surveying of State property
- Maintain perpetual inventory records in a centralized database including property acquisitions, relocations, transfers and dispositions
- Conduct periodic physical inventories across campus
- Support departments in meeting mandated State and CSU policy via the Property Control Procedures
Property Dashboard

- Background
  - PeopleSoft (PS) Asset Management - centralized property database
  - No ability for departments to obtain up-to-date information regarding property inventory

How can I start using Property Dashboard?
- Obtain security access for PS Finance Role
  - CFSSL_ZR_DBPROPERTY
- Who should be Authorized?
  - Limited to personnel designated as the department Inventory Coordinator, and their respective Authorized Approvers

Upcoming Dashboard Training Classes
- Dates to be Determined
- Sign up sheets available after session
Property Dashboard

- Selecting Property Dashboard
Property Dashboard

- Property Tab
  - Enter or Search for Dept ID/Name

Summary view results-Dept ID from Property Tab
Property Dashboard

- Individual Asset Detail from inventory retrieved under Dept search

Location History for selected asset
Property Accounting – Property Dashboard

- Download view results

Using Asset Search Tab

After selecting Criteria Click Apply
Property Accounting – Property Dashboard

- Search Results under Asset Search Tab

- Live Demonstration!!!!
Property Accounting – Property Dashboard

- Additional Resources and forms can be found under:
  - Property Control Procedures (Updated 05/21/12) – Click on hyperlink to download or review most recent property control policies and procedures.
  - Property Relocation Form – Click on hyperlink to electronically notify us about a relocation of property within the same department (deptid).
  - Transfer of Property Ownership Form – Click on hyperlink for form to notify us about a relocation of property to a different department (deptid).
  - Property Survey Request Form (Updated 12/07/10) – Click on hyperlink for form to initiate the disposal (removal) of property from your inventory:
    - Click here for definitions of Disposal Options on the Request to Survey Equipment Form
  - Property Loss Report (Updated 12/07/10) – Click on hyperlink for form to report missing, lost, stolen or vandalized property. *Note: Must be accompanied with a Property Survey Request Form.
  - Authorization for Off-Campus Use of Cal Poly Property (Updated 10/22/11) – Click on hyperlink for form to authorize a custodian for property being taken off-campus for official University business use:
    - Click here for Off-Campus Property Use Control Policy and Procedure (Updated 1/29/08).

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