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_DB_PROPERTY
- 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

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### Asset Detail

<table>
<thead>
<tr>
<th>Asset ID</th>
<th>Tag Number</th>
<th>Asset</th>
<th>Manufacturer</th>
<th>Model</th>
<th>Serial ID</th>
<th>Current Custodian Dept</th>
<th>Lost Inventory Date</th>
<th>Current Location</th>
<th>Acquisition Date</th>
<th>Cost Category</th>
<th>Cost Asset</th>
<th>Location History</th>
<th>Custodian History</th>
<th>Inventory History</th>
</tr>
</thead>
<tbody>
<tr>
<td>30000002398</td>
<td>127023</td>
<td>SLATE TABLET DELL</td>
<td>LATITUDE ST</td>
<td>44000R1</td>
<td>Fiscal Svcs-Property</td>
<td>0010013100-Administration</td>
<td>12/1/2011</td>
<td>NONCP-NonCap - Trading Only</td>
<td>1073.37</td>
<td>Location History</td>
<td>Custodian History</td>
<td>Inventory History</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Return - Refresh - Print - Export - Create Bookmark Link]
Property Dashboard

- Location History for selected asset

<table>
<thead>
<tr>
<th>Asset ID</th>
<th>Tag Number</th>
<th>Asset</th>
<th>Manufacturer</th>
<th>Model</th>
<th>Serial ID</th>
<th>Location Effective Date</th>
<th>Location</th>
<th>Building</th>
<th>Floor</th>
</tr>
</thead>
<tbody>
<tr>
<td>100000021390</td>
<td>137029</td>
<td>SLATE TABLET</td>
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<tr>
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<td>DELL</td>
<td>LATITUDE ST</td>
<td>44PDDR1</td>
<td>2/1/2012</td>
<td>0580</td>
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<td>-</td>
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<tr>
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<td>DELL</td>
<td>LATITUDE ST</td>
<td>44PDDR1</td>
<td>12/1/2011</td>
<td>0580</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Return - Refresh - Print - Export - Create Bookmark Link
Property Accounting – Property Dashboard

- Download view results
Property Accounting – Property Dashboard

- Using Asset Search Tab

After selecting Criteria, Click Apply
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 10/13/11).– 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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