Property Dashboard Training

Ken DelMese
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
Property Dashboard

- 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
Property Dashboard

- Summary view results-Dept ID from Property Tab
### Individual Asset Detail from inventory retrieved under Dept search

<table>
<thead>
<tr>
<th>Asset ID</th>
<th>Tag Number</th>
<th>Asset</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>
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</thead>
<tbody>
<tr>
<td>8000000012345</td>
<td>123456789</td>
<td>SLATE TABLET</td>
<td>DELL</td>
<td>LATITUDE ST</td>
<td>FACIAL SVS-Property</td>
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<td>Administration</td>
<td>12/1/2011</td>
<td>NONCP-NonCap - Trading Only</td>
<td>1071.37</td>
<td>Location History</td>
<td>Custodian History</td>
<td>Inventory History</td>
</tr>
</tbody>
</table>

Return - Refresh - Print - Export - Create Bookmark Link
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>
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<tbody>
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<td>44PDDR1</td>
<td>12/1/2011</td>
<td>0580</td>
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</tbody>
</table>
**Property Accounting – Property Dashboard**

- Download view results

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### Property Listing

<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 Location</th>
<th>Current Location</th>
<th>Vehicle Information</th>
<th>Cost Category</th>
<th>Profile ID</th>
<th>Acq. Date</th>
<th>Purchase Order</th>
<th>Cost</th>
<th>Acquisition Fund</th>
<th>Acquisition Class</th>
<th>Acquisition Program</th>
<th>Acquisition Project</th>
<th>Asset Status</th>
<th>Survey Status</th>
<th>Survey Report Date</th>
<th>Survey Report Code</th>
<th>Old Tag Nr.</th>
<th>Asset Type</th>
<th>Asset Subtype</th>
<th>Parent Asset ID</th>
<th>Asset Class</th>
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<td>0500</td>
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</table>
Using Asset Search Tab

After selecting Criteria, Click Apply.
### Search Results under Asset Search Tab

#### Asset Search Prompt

<table>
<thead>
<tr>
<th>Asset ID</th>
<th>Tag Number</th>
<th>Asset Description</th>
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<tbody>
<tr>
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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>Last Inventory Date</th>
<th>Current Location</th>
<th>Acquisition Date</th>
<th>Cost Category</th>
<th>Cost</th>
<th>Location History</th>
<th>Custodian History</th>
<th>Inventory History</th>
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</thead>
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<tr>
<td>900090000000993</td>
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<td>MICROSCOPE AO 116 AO</td>
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<td>Custodian History</td>
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<td></td>
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</tr>
</tbody>
</table>
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).