



Moveable Equipment Asset Management

Unit Equipment Coordinator:

Each unit on campus has had the Dean, Chair or Director designate one or more individuals to manage their unit's equipment assets.

The University is responsible for the stewardship of assets whether located on University premises or at off site locations. Movable equipment assets purchased from University funds are the property of the University of Alberta unless otherwise stated by the sponsor or donor terms and conditions. *Movable equipment includes assets acquired through Professional Expense Reimbursements (PER), transfers, donations, credit card purchases, low dollar purchases, purchase orders, and Gifts in Kind. Equipment that is loaned or leased to the University can be tracked for the duration of the term during which the U of A assumes responsibility for the care and maintenance of the asset. Movable equipment assets exclude furniture and consumables. Asset tracking is used for insurance estimates, to determine ownership of assets when misplaced and proof of ownership in cases of loss or damage.*

Gaining Access to PeopleSoft Asset Management Module

Gaining access to the PeopleSoft Asset Management Module is a two-part process:

- A. Complete the [Request for Financials Access](#) form. This form is available on the IST home page under "Administrative Applications Access."
 - User access can be requested under "Additional Roles or Comments" by entering "ZAM_EQUIP_ENTRY."
 - Separate query access is required to make use of those queries (ZZZ_QUERY_VIEWER). Asset Management queries begin with "ZAM".
 - Send the completed form to your department's PeopleSoft designate.
- B. Contact Equipment Services to activate your access.

Users will be able to enter asset records one at a time in the module or use an upload template that is submitted to Equipment Services (ES) to complete the upload. For a copy of the template please contact ES.

For instructions on how to use the Asset Management Module please see the manual available in the PeopleSoft training module, [UPK](#) (you must log in for this link to work).

Equipment Services' role

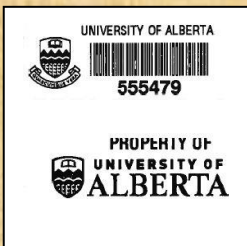
- Printing orders through SupplyNet and vendor reports
- Send tagger(s) to tag equipment on orders generated at SMS
- Maintain campus inventory records in the central inventory system within the PeopleSoft application
- Provide answers to questions regarding equipment transfer and disposal
- Aid departments in adding large volumes of inventory into the central system
- Provide inventory stickers to campus
- Conduct audits every 1-2 years

Campus' role and responsibilities

- Tag assets/request tag(s) for assets belonging to department
- Enter assets record into PeopleSoft or request that ES enter the assets
- Update ES with any changes to assets' status/details
- Each unit is required to complete a yearly internal review of all assets (UAPPOL procedure)

Categories of Equipment in PeopleSoft that are reviewed

- PER
- Equipment less than 10 years old and greater than \$5000 in value (2008 – 2018)
- Equipment less than 10 years and less than \$5000 in value
- Equipment more than 10 years old and any value
- Other Equipment (including desirable, data storage devices, and any requests from units)



Contact Information:

Equipment Services

Phone:
(780) 492-8899
Fax:
(780) 492-8268

Email:
eilst@ualberta.ca

Surplus Services

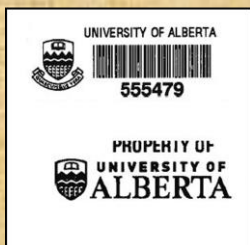
Phone:
(780) 492-5393
Fax:
(780) 492-8268

Email:
smssurplus@ualberta.ca

Moveable Equipment Asset Management

Unit Equipment Coordinator:

Each unit on campus has had the Dean, Chair or Director designate one or more individuals to manage their unit's equipment assets.



Contact Information:

Equipment Services

Phone:
(780) 492-8899
Fax:
(780) 492-8268

Email:
eelist@ualberta.ca

Surplus Services

Phone:
(780) 492-5393
Fax:
(780) 492-8268

Email:
smssurplus@ualberta.ca

www.policiesonline.ualberta.ca

Providing inventory Tags to campus

Tags will no longer be sent out in large quantities. Departments may continue to request tags but they will only be sent tags once Equipment Services has received either:

- the purchase order/receipt with the serial number and location included;
- the upload template filled in with all the tagging information; or
- the completed [Asset Tag Request form](#) available on our website

Equipment Services requests this information is sent to us via email or entered directly into the PeopleSoft Asset Management Module. Information required but not limited to:

- *Asset Description*
- *Serial Number*
- *Custodian ID*
- *Building*
- *Location*
- *Acquisition Code*
- *Order Number*
- *Acquisition Date*
- *Cost*
- *Vendor Name*
- *Speed Chart Key*
- *Account*

Property tags without numbered barcodes are also available for equipment that doesn't need to be tracked but still should be identified as University equipment.

Summer 2018

Supply Management Services will continue performing inventory control audits of movable assets that have been recorded in the central inventory database within the PeopleSoft application.

The purpose of these audits is to retire assets from the system older than 10 years old. Equipment Services will focus on compliance regarding tagging equipment that falls under the following categories:

- Equipment with a value of \$5,000 or greater
- Desirable equipment with a value of less than \$5,000
- IT data storage equipment (eg. Desktop computers, iPads, laptops, etc.)
- Assets purchased via PER account

Equipment Services will have an auditor visit departments to assess tagging of assets as well as provide an excel spreadsheet with all current assets entered in the central database to the Unit Equipment Coordinator for review to determine if any need to be retired/removed.

Disposal of assets requires completed paperwork, signed by the Dean, Director or Chair and submitted to Equipment Services. Equipment Services will then update the database with these changes.

Changes to Asset Status

- If an asset has moved rooms or down the hall within the same department – please send us an email at eelist@ualberta.ca. We will update this information in PeopleSoft. Another option is to request access to our Data Entry module in PeopleSoft so you can update it yourself.
- If an asset has been transferred to another department (even if it has just moved down the hall) please complete the [equipment transfer form](#) found in the SMS Forms Cabinet).
- If an assets is bought with a CFI discount which in turn has lowered the purchase price to less than \$5,000, it is still valued at the pre-discount level and needs to be tagged as the asset falls within our tagging requirements.

Need Help?

If you have questions or concerns with how to use the central system in PeopleSoft or regarding Asset Management procedures/policies please contact Equipment Services equipment.services@ualberta.ca. We can also be reached at 780-492-8899 or 8895. Questions or concerns specific to the functioning of PeopleSoft should be directed to IST Enterprise Solutions.