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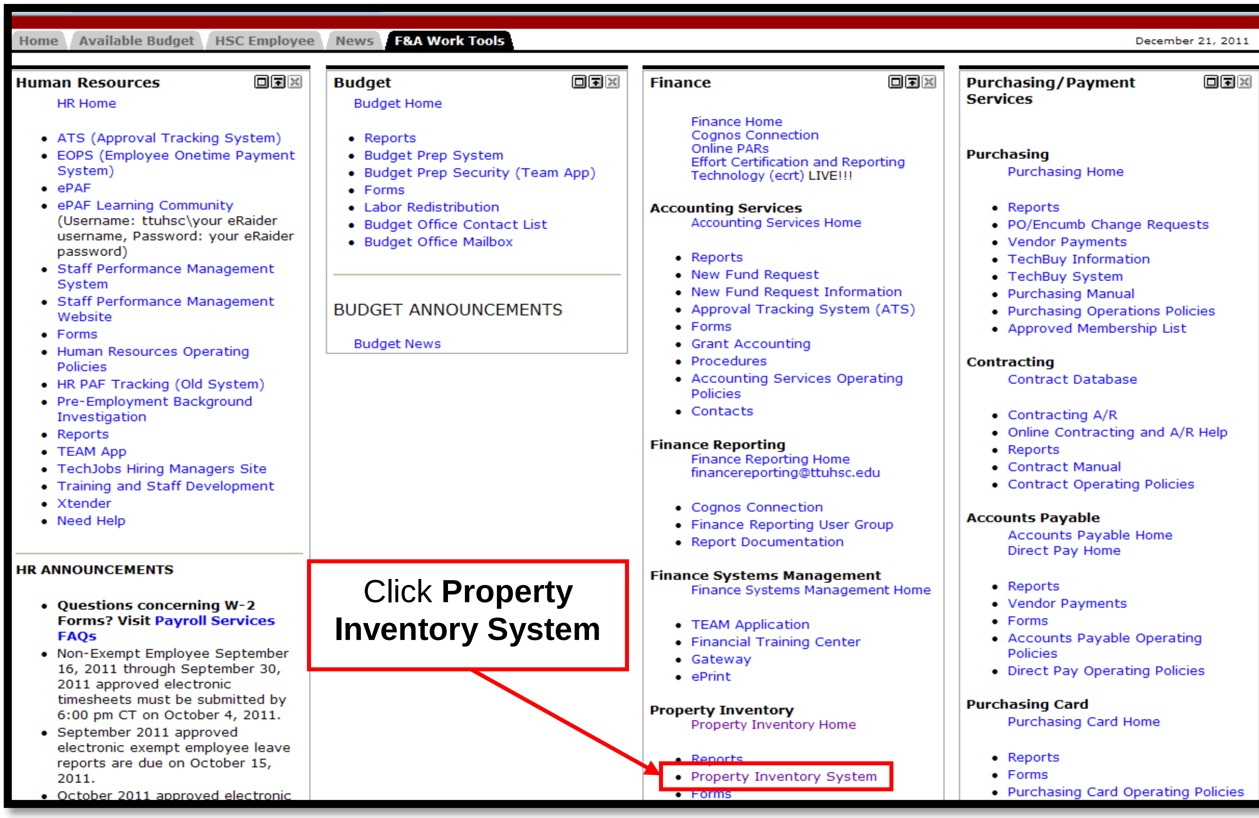
Property Inventory System

As a state supported educational institution, the TTUHSCEP property inventory system must meet the requirements of the state Purchasing and General Services Act (Texas Government Code § 403.271 [a] and [b]) with regard to personal property, and the Texas Capital Trust Fund (Texas Government Code § 403.271 [a] and [b] and § 2201.002) relating to real property. These requirements apply regardless of funding source. Additionally, if the property was acquired with non-state fund sources or by donations, the requirements associated with those funds or donations must be met. The inventory system at TTUHSCEP is subject not only to these requirements, but also to those of the State Auditor. HSC OP 63.10 defines the scope of property management at TTUHSCEP, and provides the policy and procedures to manage, control and account for all institutional property at TTUHSCEP. For additional information on property management policy and procedures, please review HSC OP 63.10.

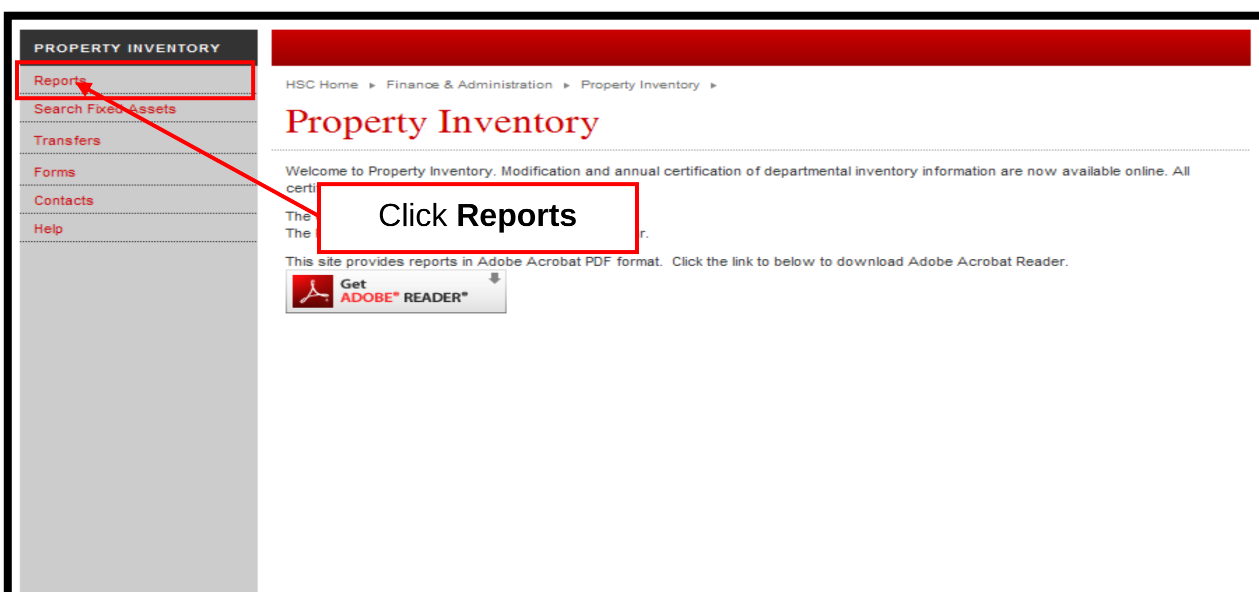
State law requires that a complete physical inventory be taken each year. This inventory, or Annual Certification, will be taken by the departmental Property Custodian and other departmental personnel using the most recent listing from the Fixed Asset System. The listing and instructions will be provided through the online Property Inventory System. The inventory process will occur over a two-month period in the spring of each year. Email notifications will be sent to property custodians. All updates and changes that need to be made must be entered and reflected in the inventory reports before the certification can begin. The inventory reports necessary for certification include: the **Department Inventory Report**, the **Items Not Tagged Report**, the **Missing Report**, and the **Lost and Stolen Report**. It is important to note that you must allow sufficient time before the certification deadline for updates and changes to process in the system to ensure all inventory reports contain the correct information before submitting the reports for certification.

Annual Certification Process

To access the Property Inventory System, log into the WebRaider portal and select the F & A Work Tools tab. Under the Finance channel and Property Inventory, click on the **Property Inventory System** link.



The **Property Inventory** page will display. The first step of the Certification Process requires the verification of all property that is tied to your department listed on the **Departmental Inventory Listing** report. To access this report, click on the **Reports** link in the menu bar on the left side of the page.



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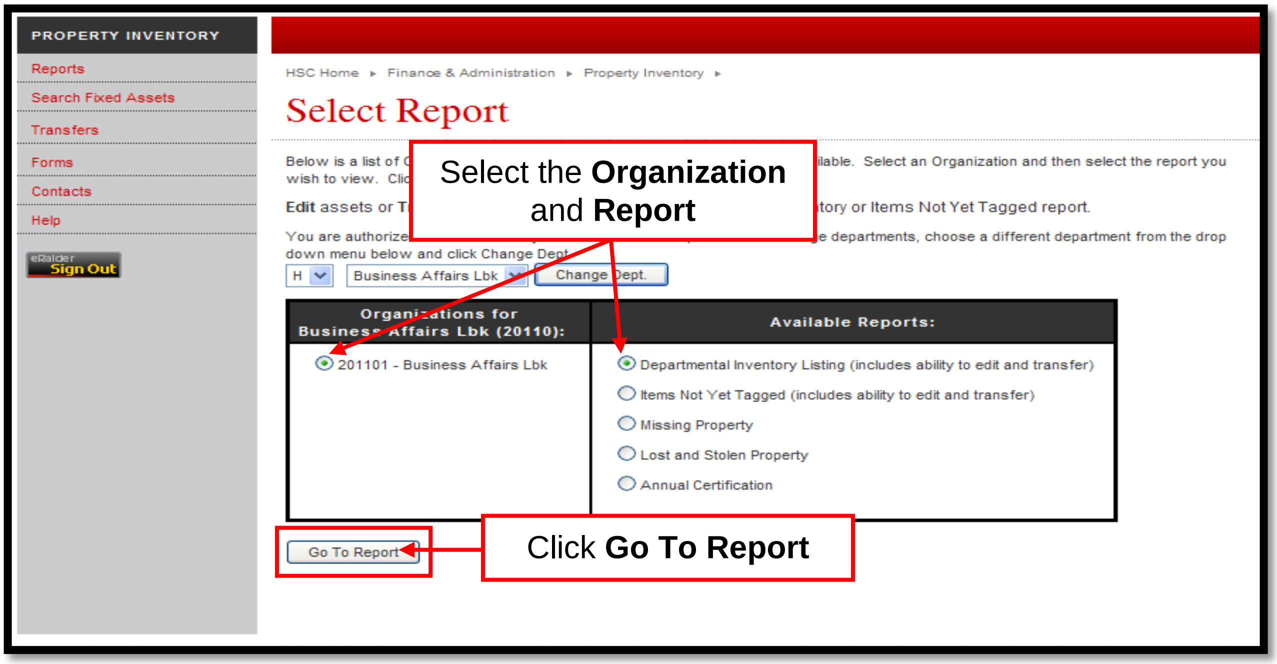
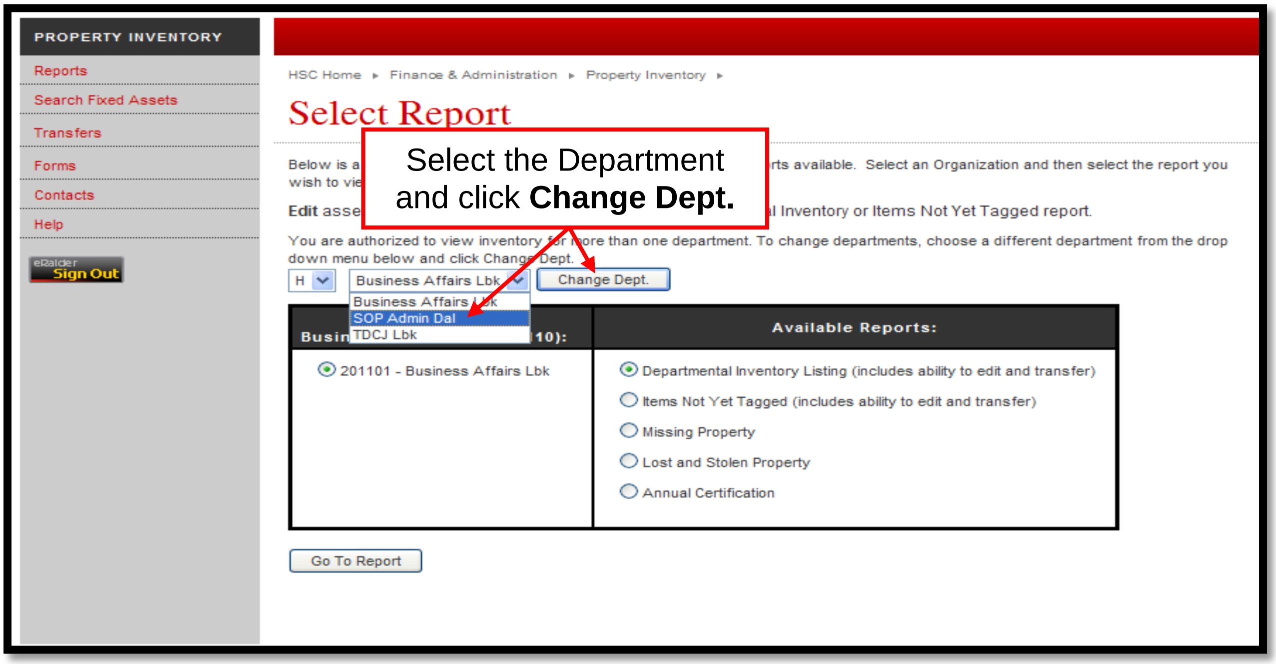
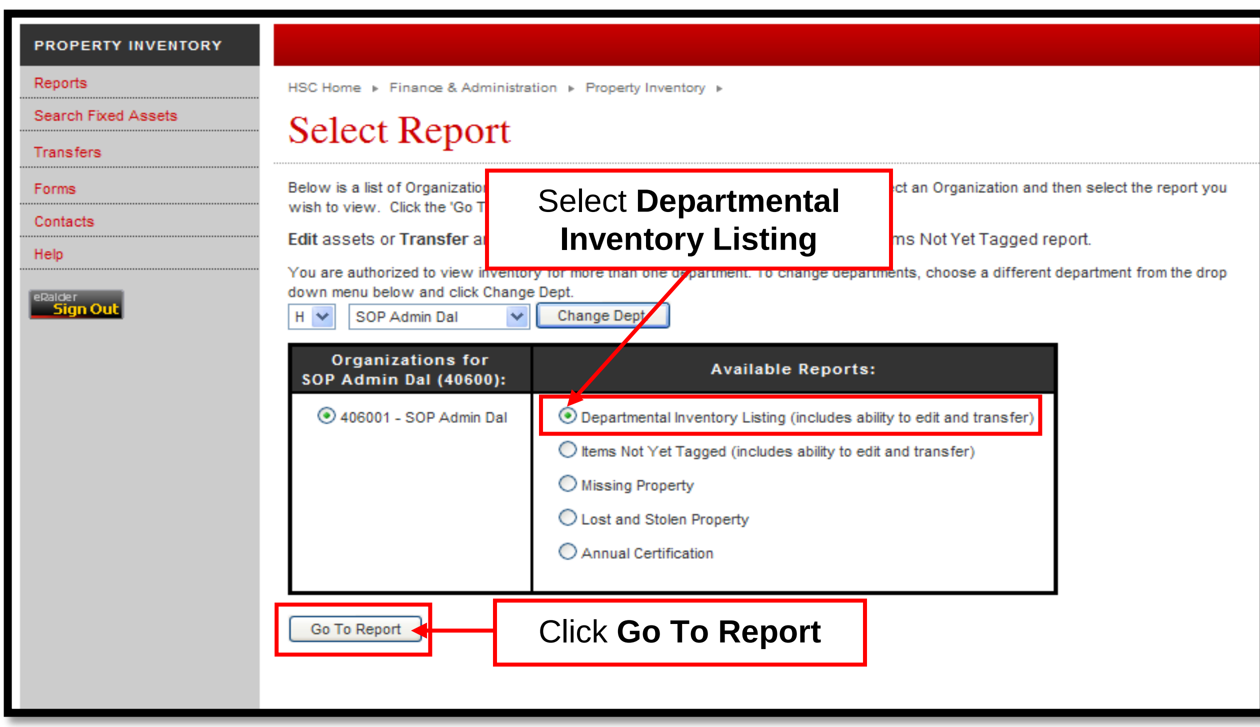
The **Select Report** page displays a list of your **Organizations** and a list of **Available Reports**. Select the **Organization** and then select the report you wish to view by clicking on the appropriate radio button for each. After you have completed your selection, click on **Go To Report**.



If you are authorized to view inventory for more than one Department, you can change Departments by selecting a different Department from the drop down menu and click on **Change Dept.**



The Department you selected will display. Select the **Departmental Inventory Listing** from the **Available Reports** and click on **Go To Report**.



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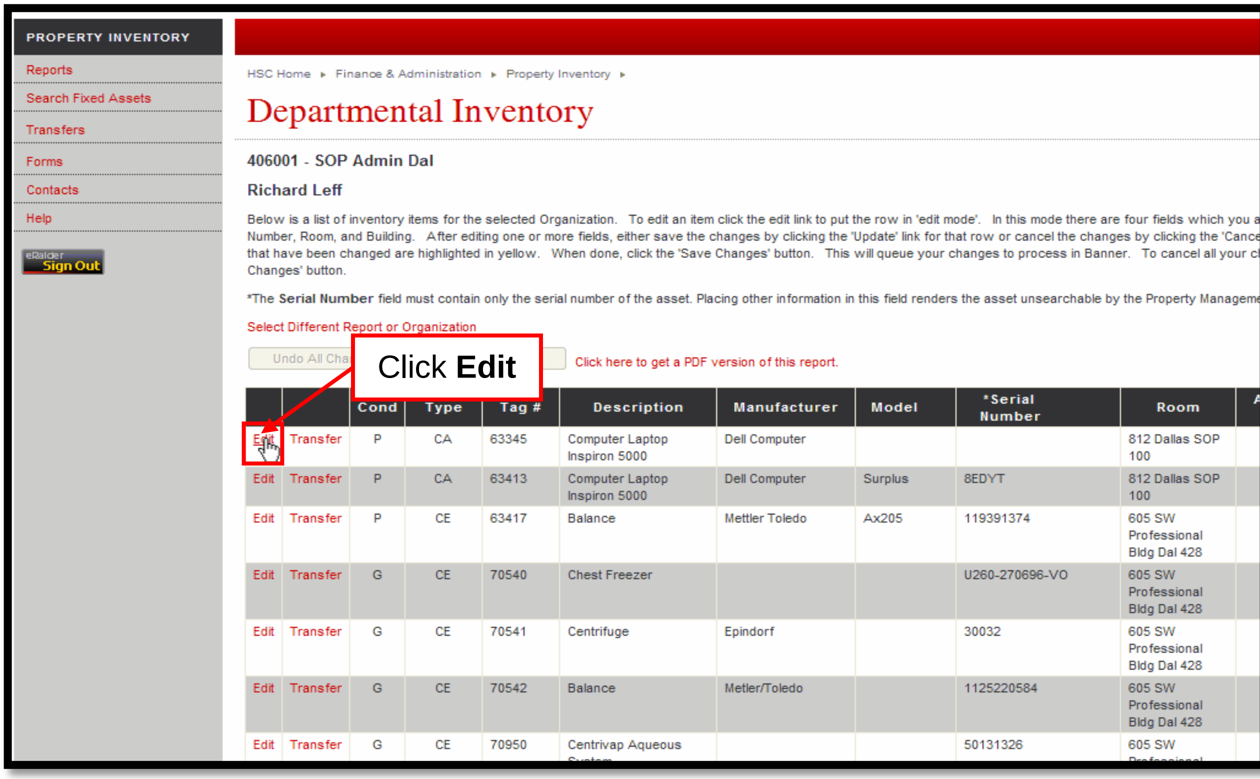
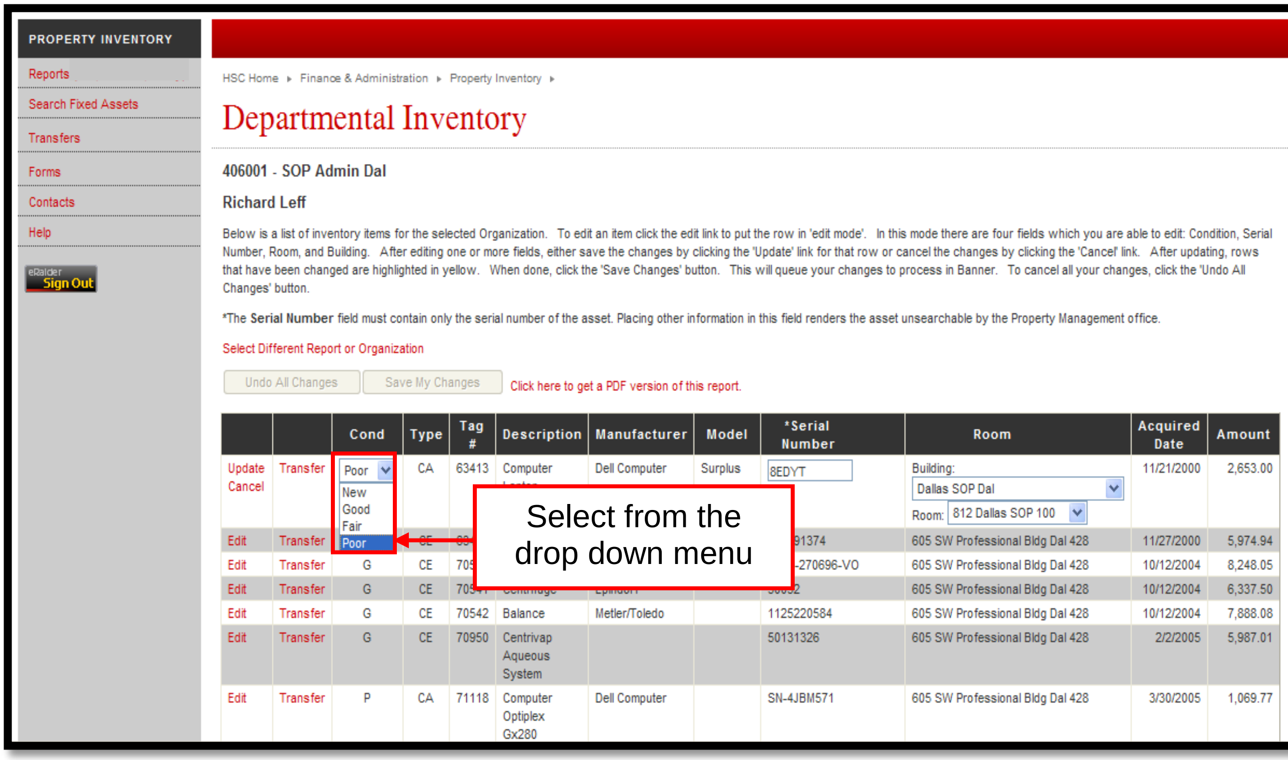
The **Departmental Inventory** page will display. You can print the report by selecting the **Click Here to get a PDF version of this report** link. You can also return to the **Select Report** page to change your selection by clicking on the **Select Different Report or Organization** link.

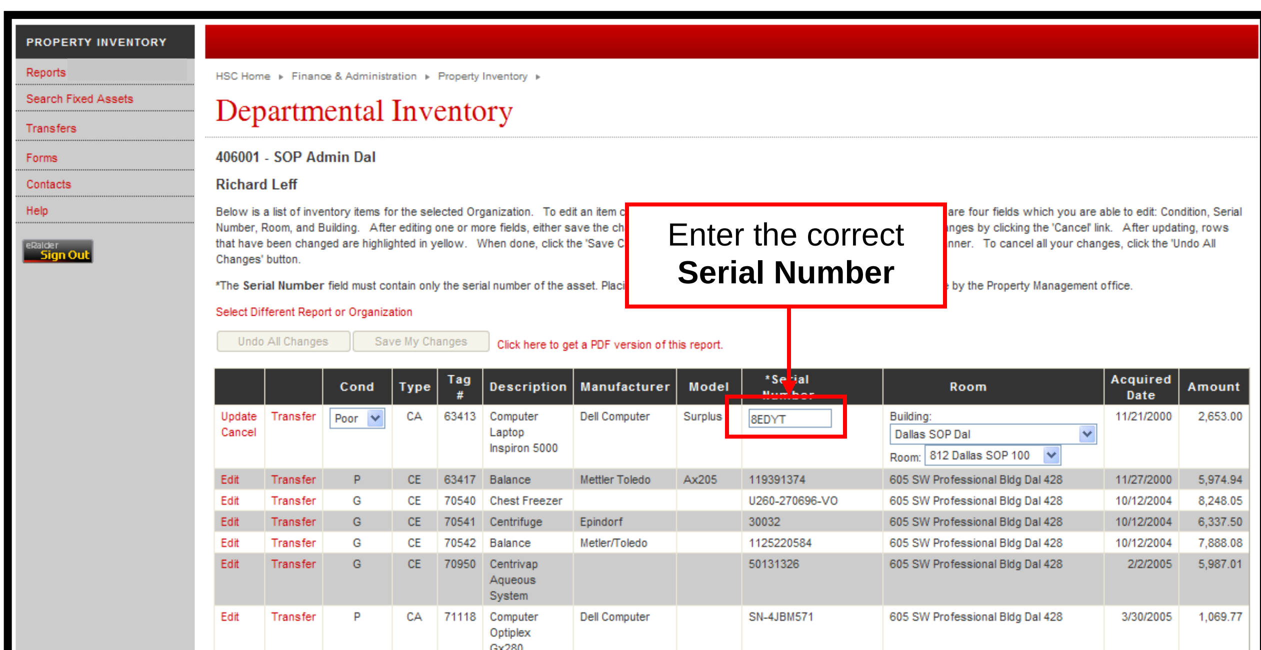
The first step of the Certification Process requires the verification of all property that is tied to your department listed on the **Departmental Inventory Listing** report. This process includes verifying the **Serial Number**, the **Building** and **Room** location, and the **Condition** of the asset. You can edit these fields if you need to make corrections. To edit an item, click on the **Edit** link to put the row in Edit Mode.



To edit the **Condition** of the asset, click on the drop down arrow under the **Cond** (Condition) field and select from **New**, **Good**, **Fair**, or **Poor**.



To edit the **Serial Number**, enter the correct serial number in the textbox under the **Serial Number** field. It is important to note that the serial number must be entered as the serial number assigned by the manufacturer. Do not enter any other information in this field. Placing other information in this field renders the asset unsearchable.



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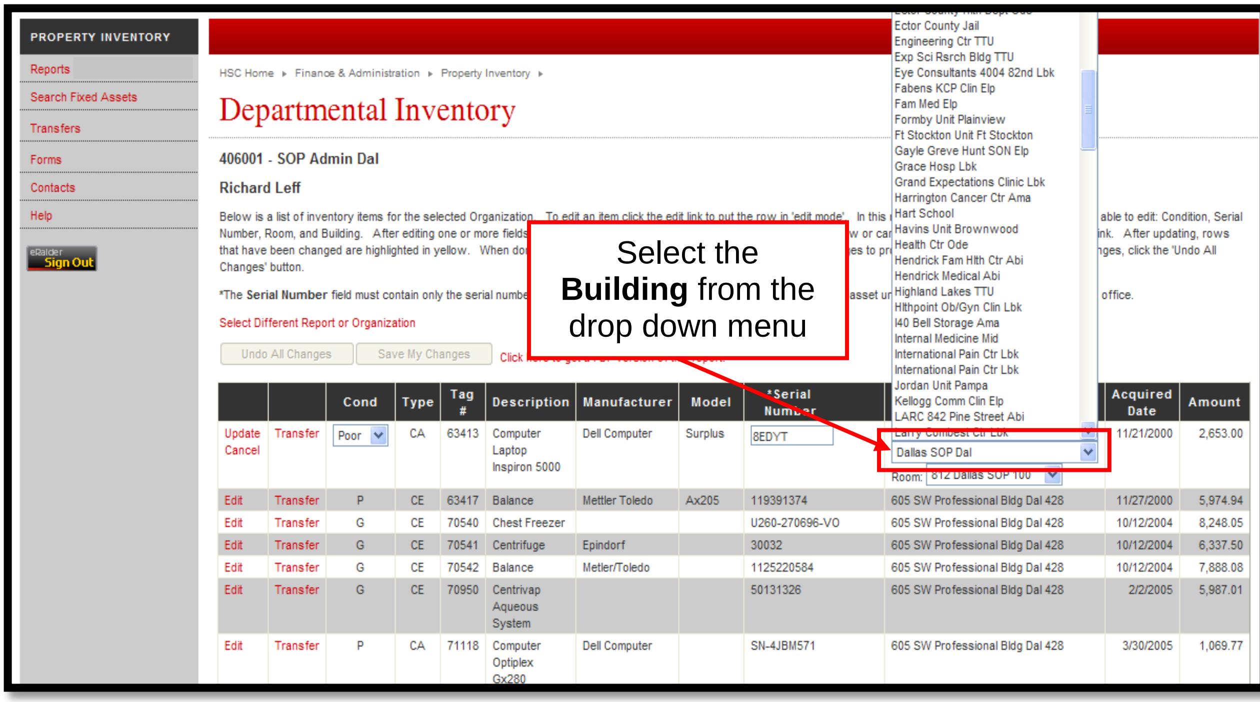
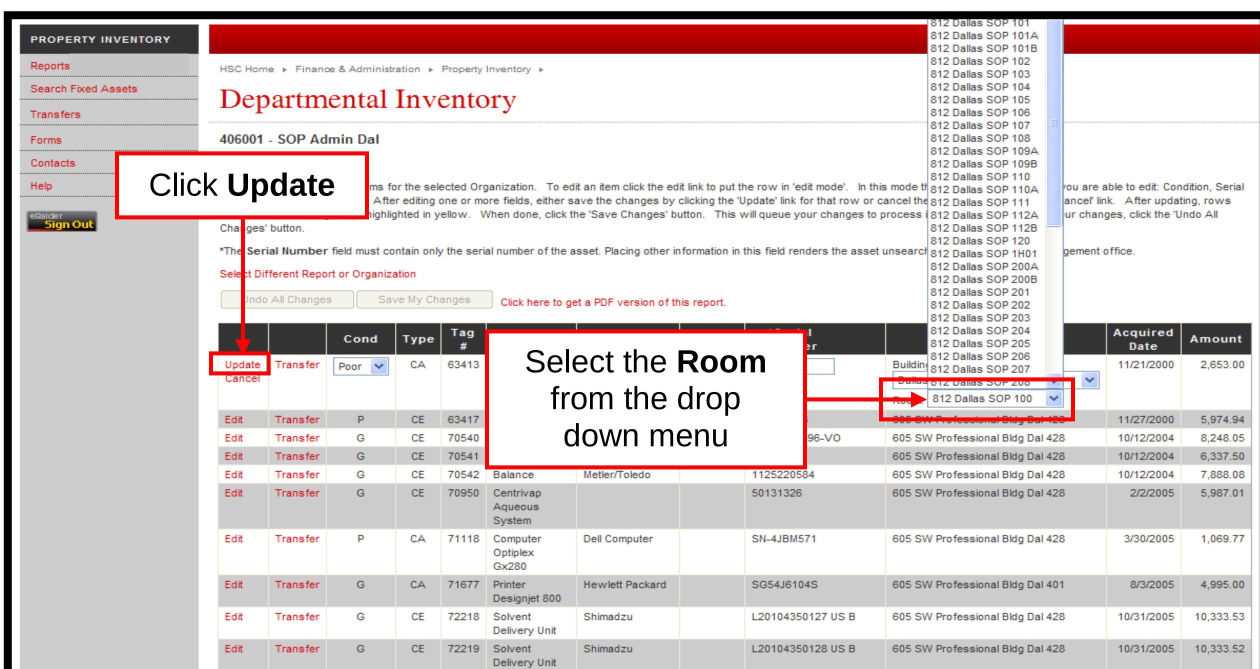
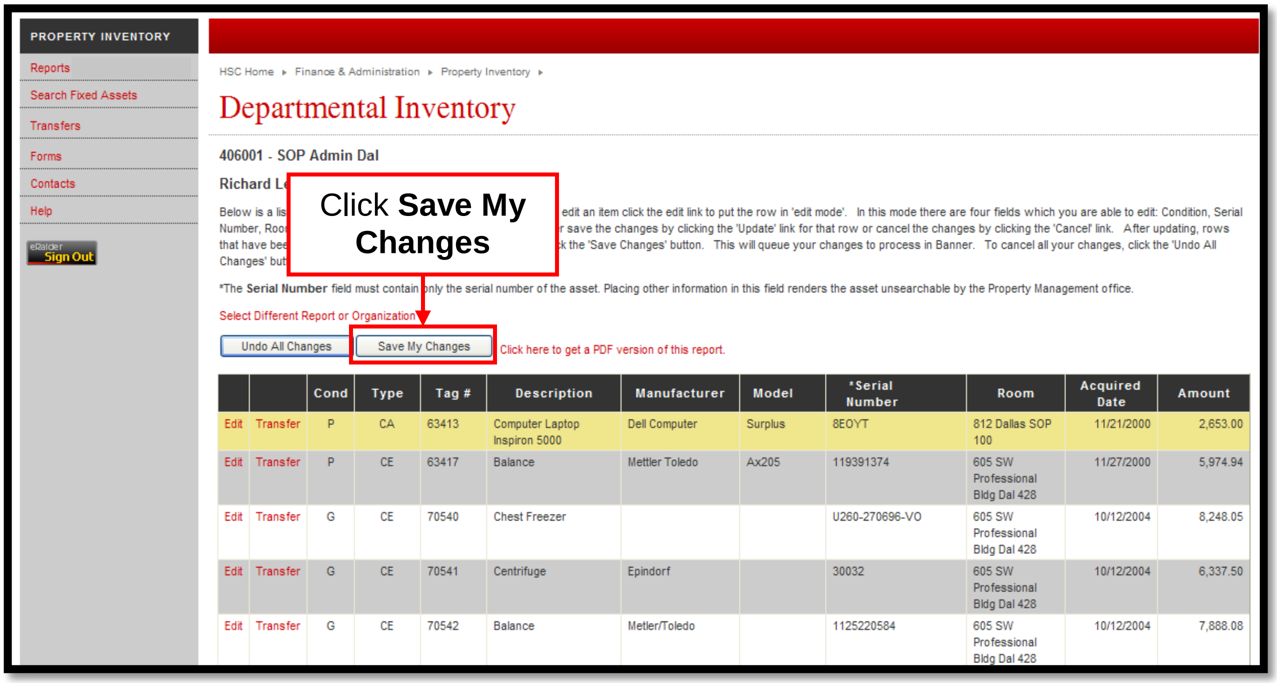
To edit the **Room** location, you must first select the correct **Building** from the drop down menu.



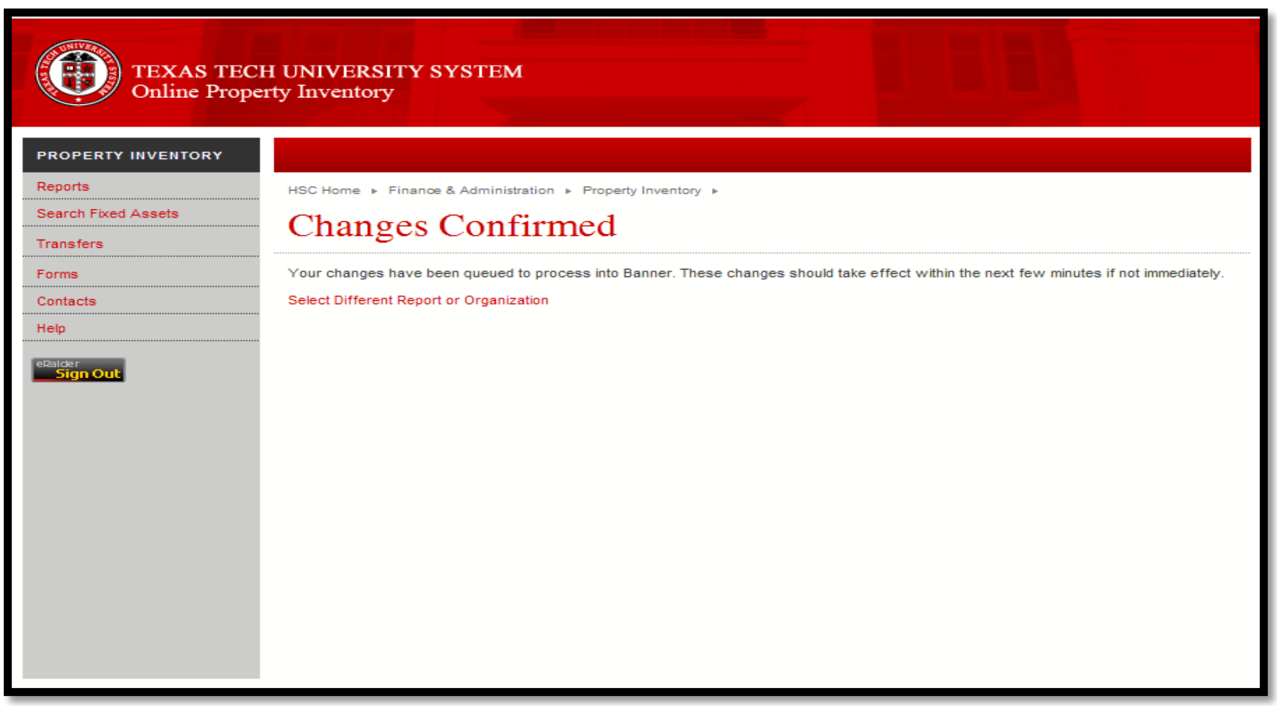
After you have selected the correct **Building**, select the correct **Room** number from the drop down menu. If you wish to cancel the changes you made for an item, click on the **Cancel** link. After all the changes are complete, click on **Update**.



After Updating, the rows where you have made your changes will be highlighted in yellow. To cancel all your changes, click on the **Undo All Changes** button. Verify that all the changes you have entered are correct and then click on **Save My Changes**.



Selecting **Save My Changes** will queue your changes to process in Banner. You will be able to verify your changes the next business day in the Property Inventory System.



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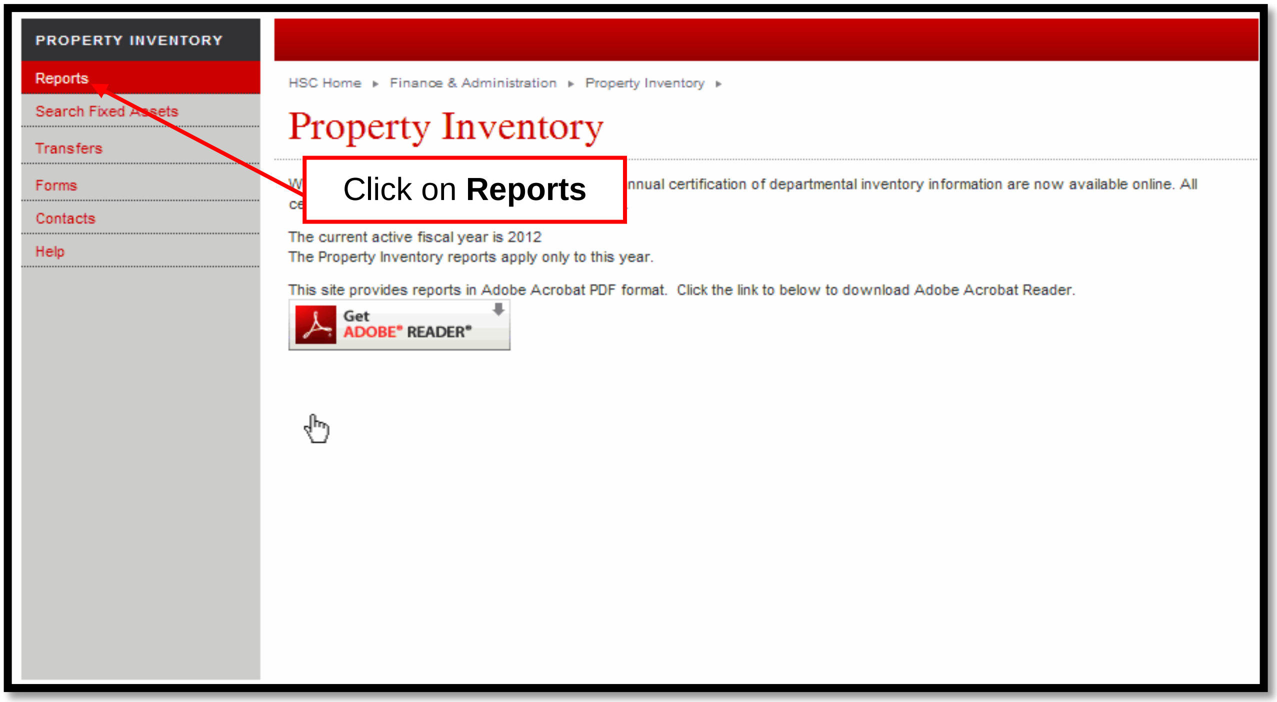
The next step in the certification process requires you to complete the **Items Not Yet Tagged** report. Click on the **Reports** link from the menu bar on the left side of the page.



From the Select Report page, select the appropriate **Organization** and the **Items Not Yet Tagged** report from the Available Reports. When you have completed your selection, click on **Go To Report.**

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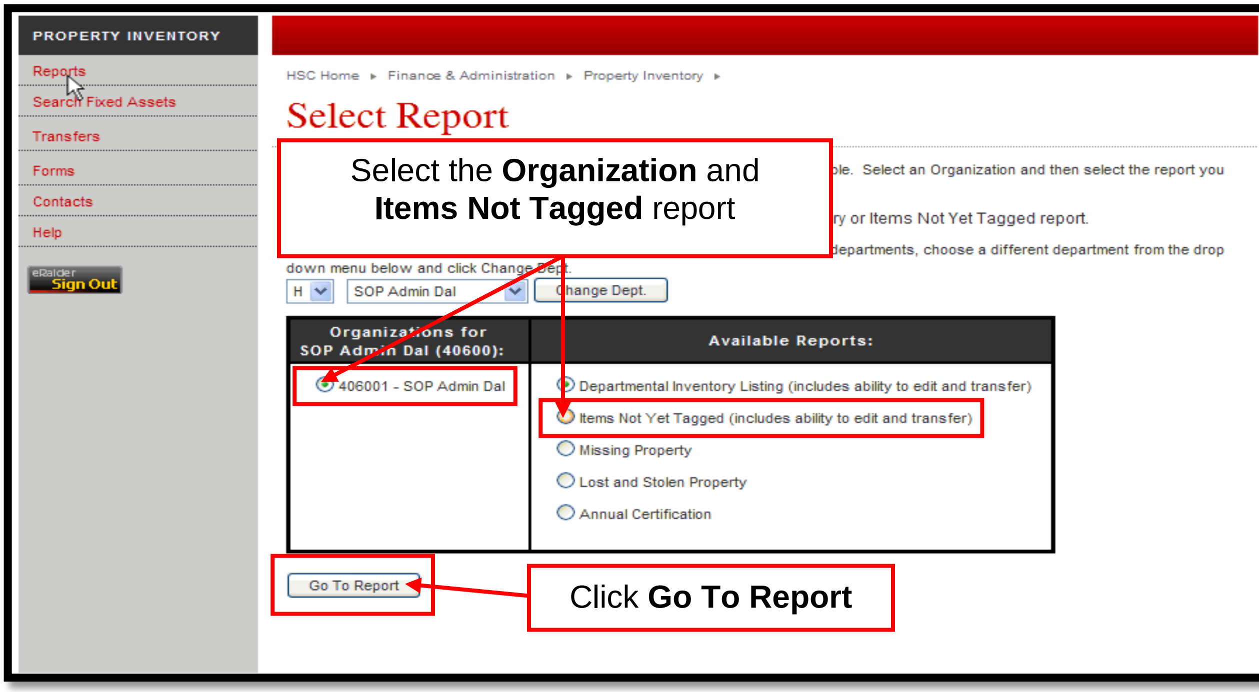
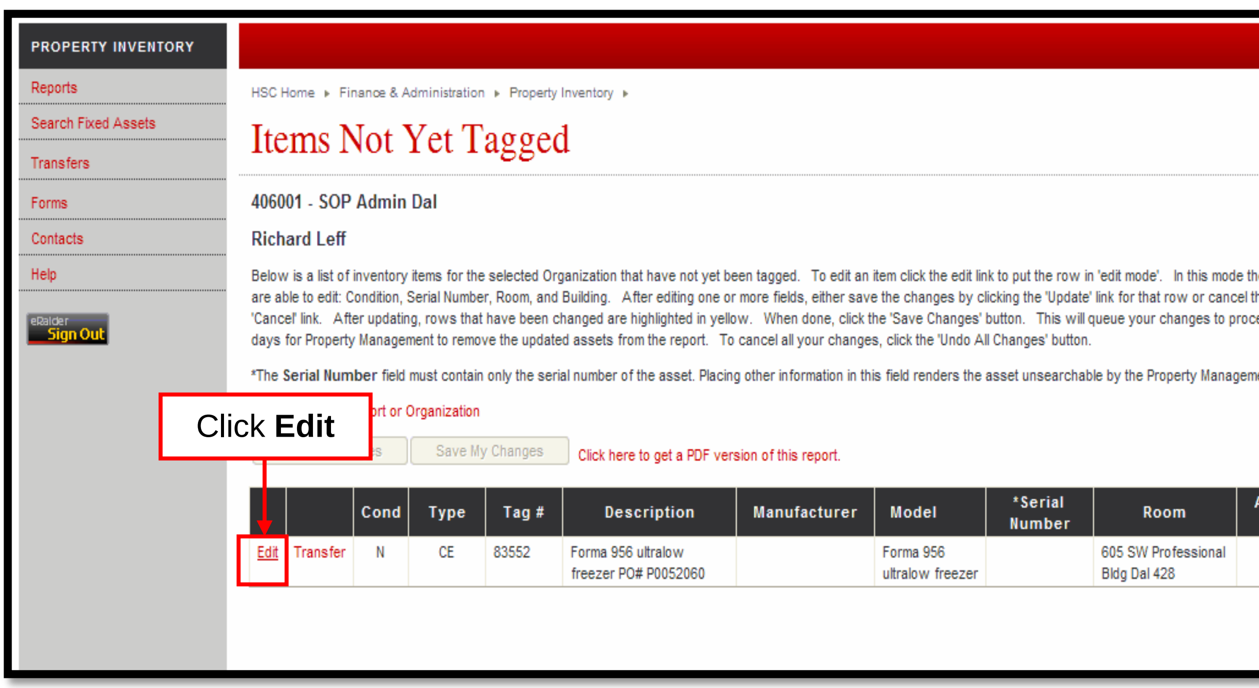
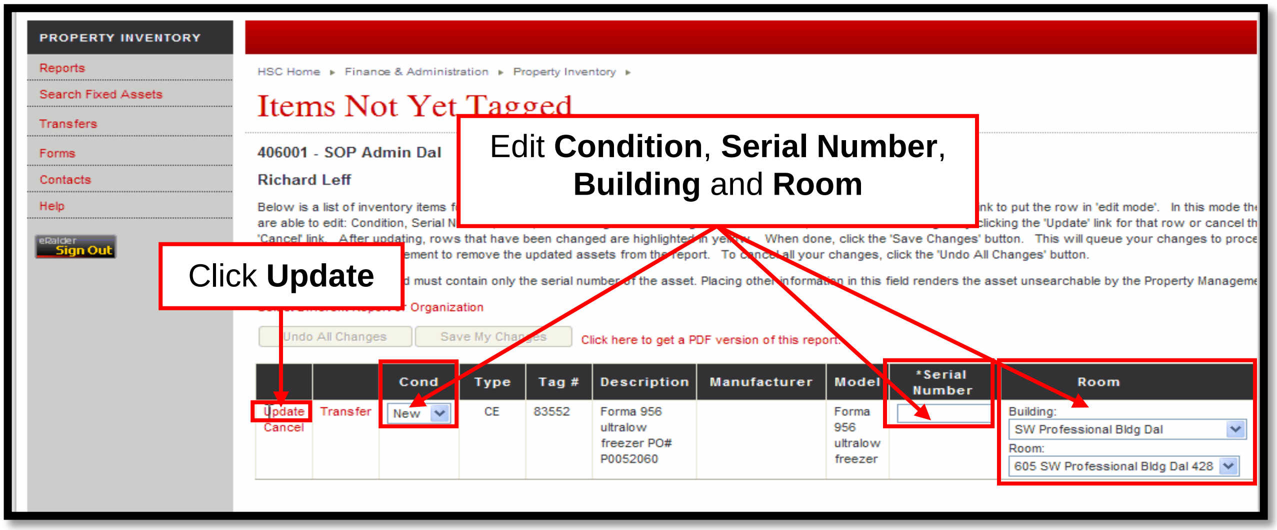


The **Items Not Yet Tagged** page will display a list of inventory items from the selected Organization that have not yet been tagged. To edit an item, click on **Edit**.

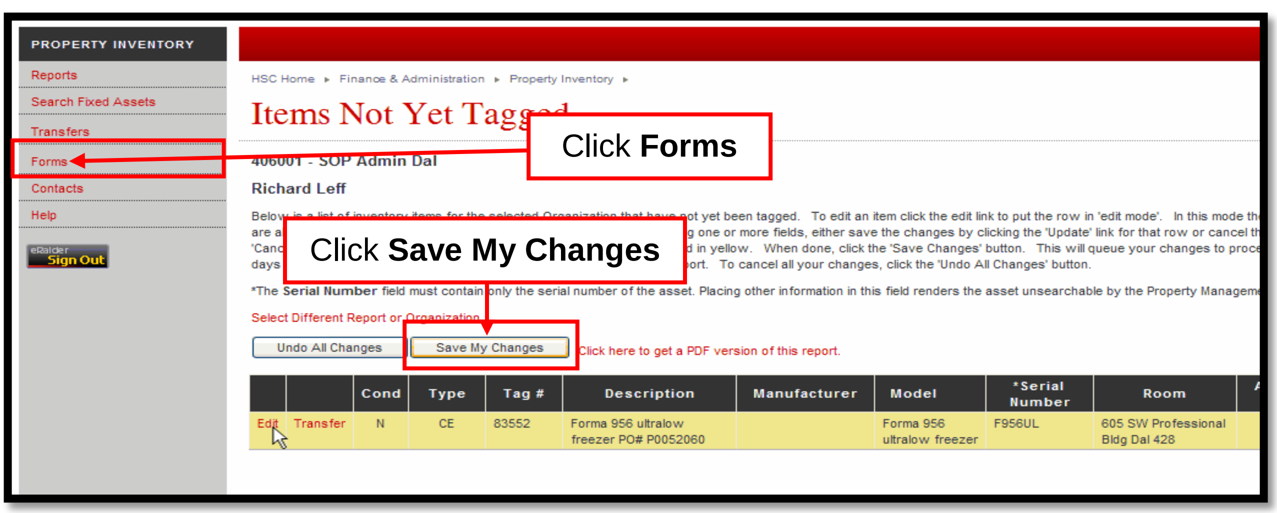


By selecting **Edit**, you will place the row in the Edit Mode allowing you to enter any missing information or edit the **Condition**, **Serial Number**, **Room** and **Building** fields. It is important to note that the **Serial Number** must be entered as the serial number assigned by the manufacturer. Do not enter any other information in this field. Placing other information in this field renders the asset unsearchable. You can cancel the changes by clicking on the **Cancel** link, or you can save these changes by selecting **Update** for each row that a change was entered.

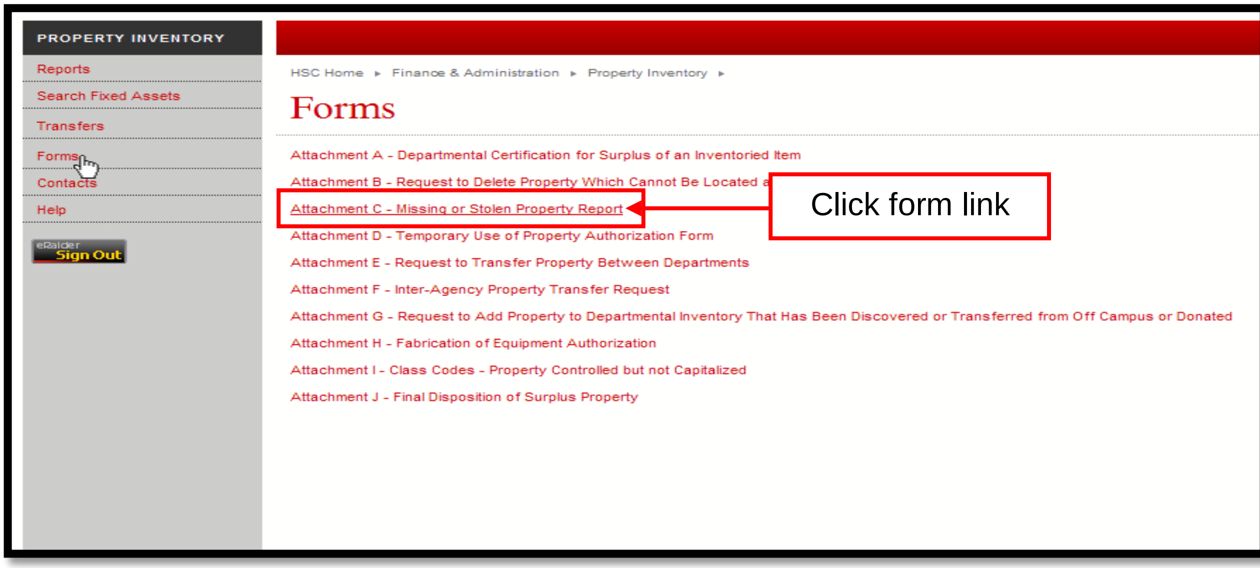


After Updating, the rows where you have made your changes will be highlighted in yellow. To cancel all your changes, click on the **Undo All Changes** button. Verify that all the changes you have entered are correct and then click on **Save My Changes**. This will queue your changes to process in Banner. Allow 3 to 5 business days for Property Management to remove the updated assets from the **Items Not Yet Tagged** report.

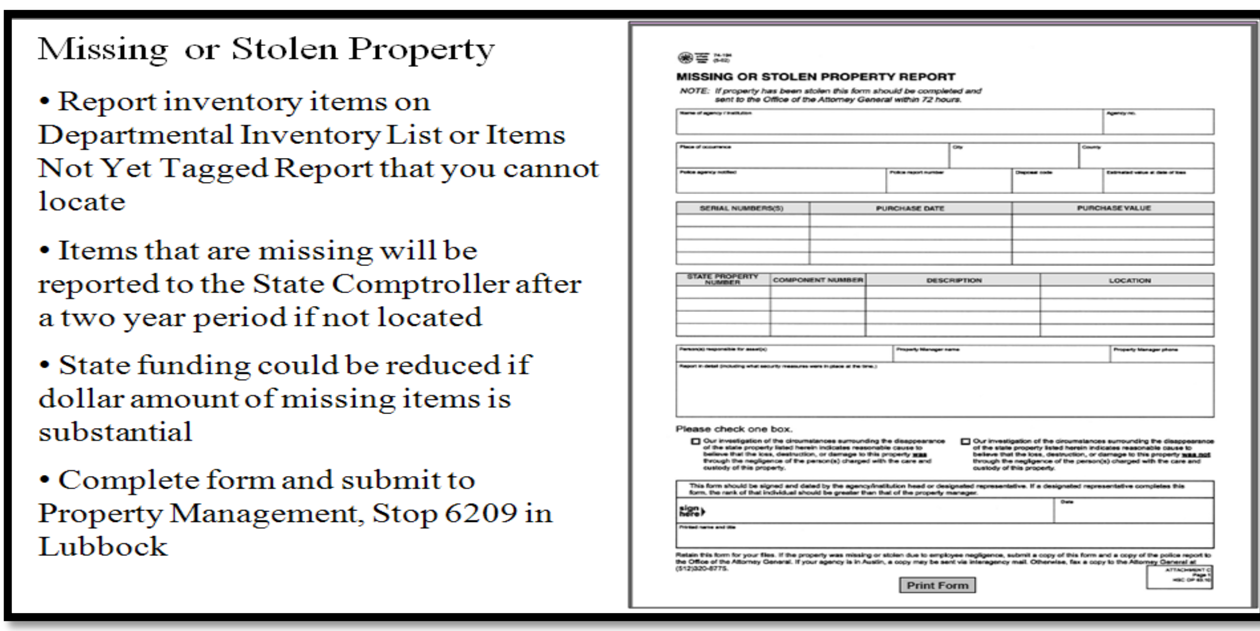
To continue the Certification Process, click on the **Forms** link in the menu bar on the left side of the page.



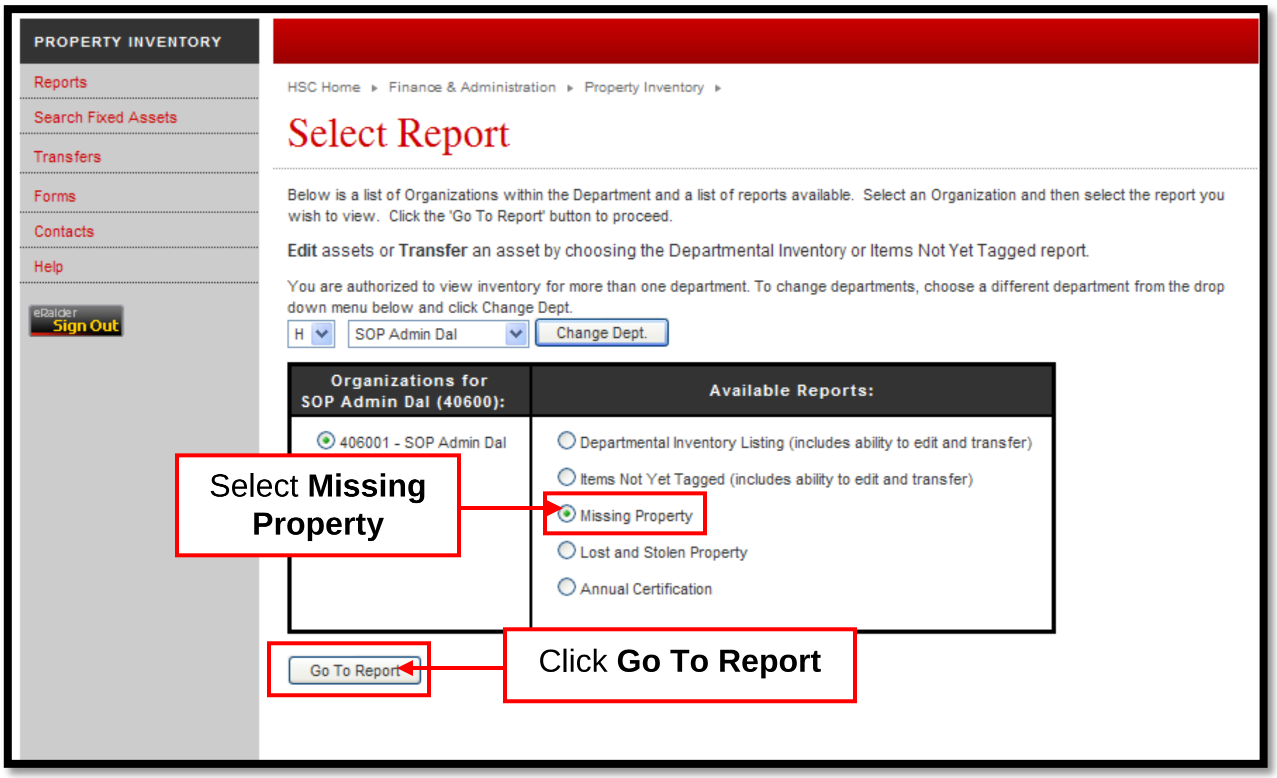
The **Forms** page will display. If there are inventory items that are on the **Departmental Inventory List** or **Items Not Yet Tagged** report and you cannot physically locate the items, you must report the items as missing. Due diligence must be made to locate the items before you report them as missing. Report the missing items by completing and submitting a **Missing or Stolen Property Report** to Property Management. Click on the form link (Attachment C) to access the form.



Complete the **Missing or Stolen Property Report** form and submit it to Property Management. Please allow 3 to 5 business days for Property Management to process the form. The missing or stolen items must appear on the **Missing Report** before proceeding with the Certification Process.



After allowing adequate time for the missing or stolen items to be processed, you can proceed to the Missing Property step of the Certification Process. Click on the **Reports** link in the menu bar on the left side of the page. Select the **Missing Property** report from the list of **Available Reports** and click on **Go To Report**.



The **Missing Property** page will display. You can print this report for your records by selecting the **Click here to get a PDF version of this report** link. Please verify that the items listed on the **Missing Property** page are actually missing. If there is an item on this list that has been located, notify Property Management at propertymanagement@TTUHSCEP.edu. If an item on this list has been stolen, you must submit the **Request to Delete Property Which Cannot Be Located as a Result of Theft or Loss** form to Property Management. You can access this form by clicking on the **Forms** link in the menu bar on the left side of the page. Please make every attempt to locate all missing items as they will be reported to the State Comptroller's Office after two calendar years from the date that it was determined the property was missing.

To proceed, click on the **Reports** link in the menu bar on the left side of the page.

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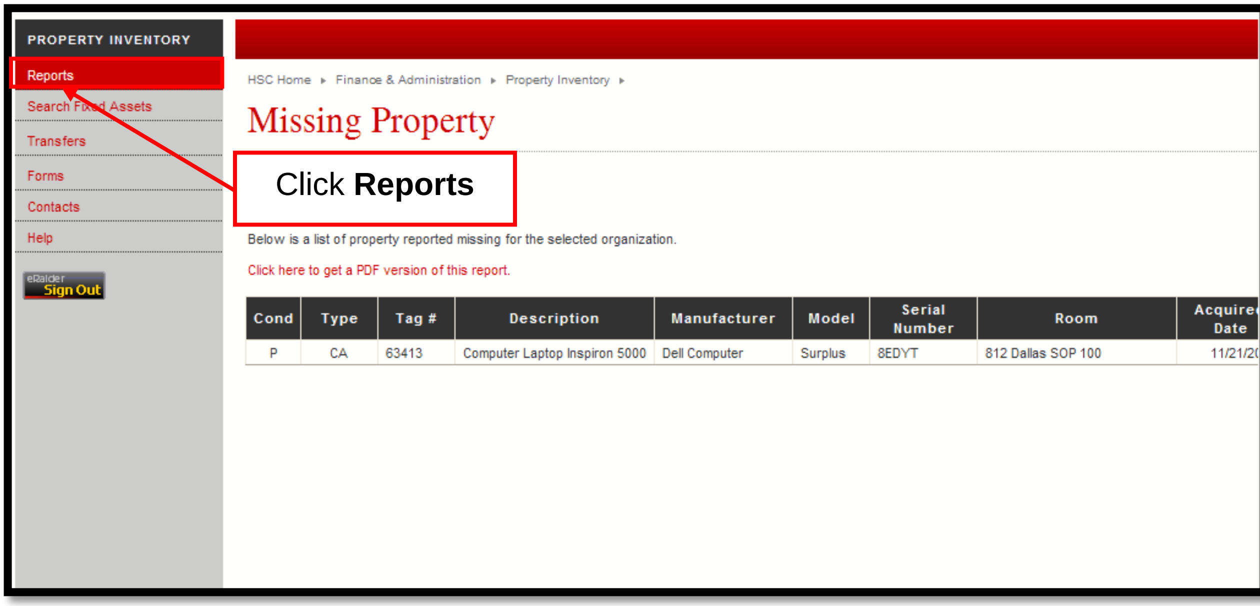
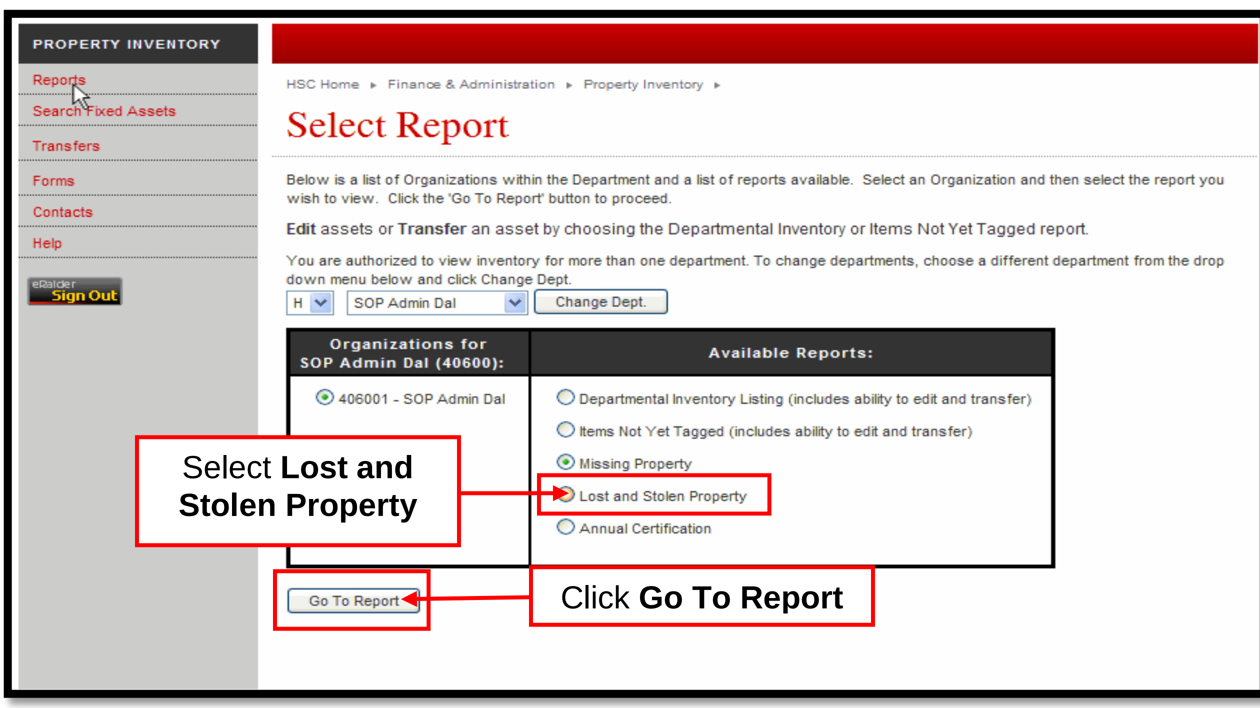
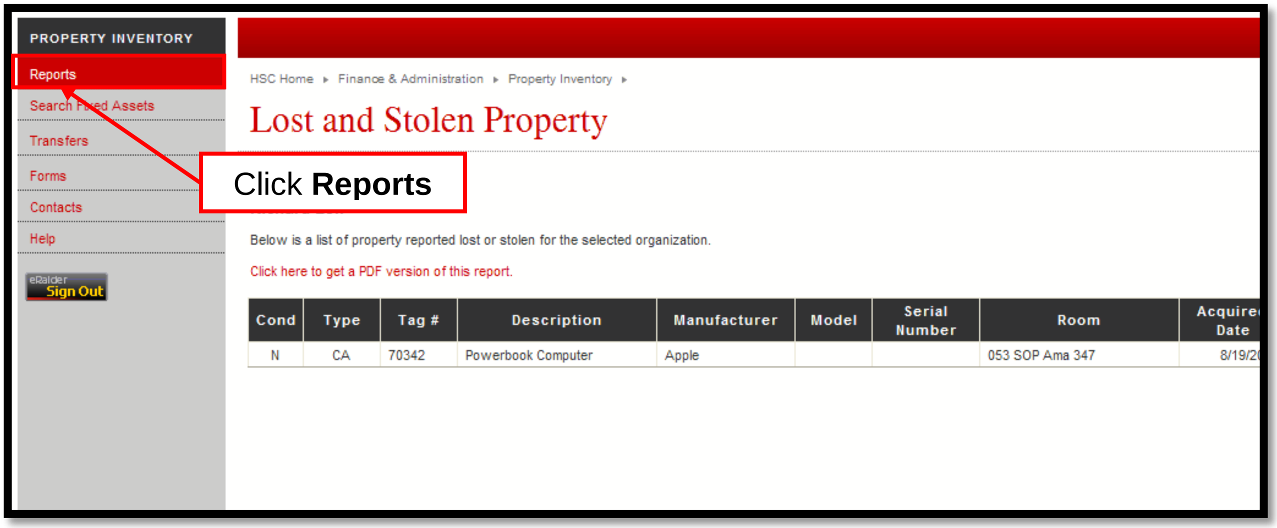


The **Select Report** page will display. Select the **Lost and Stolen Property** report from the list of **Available Reports** and click on **Go To Report**.

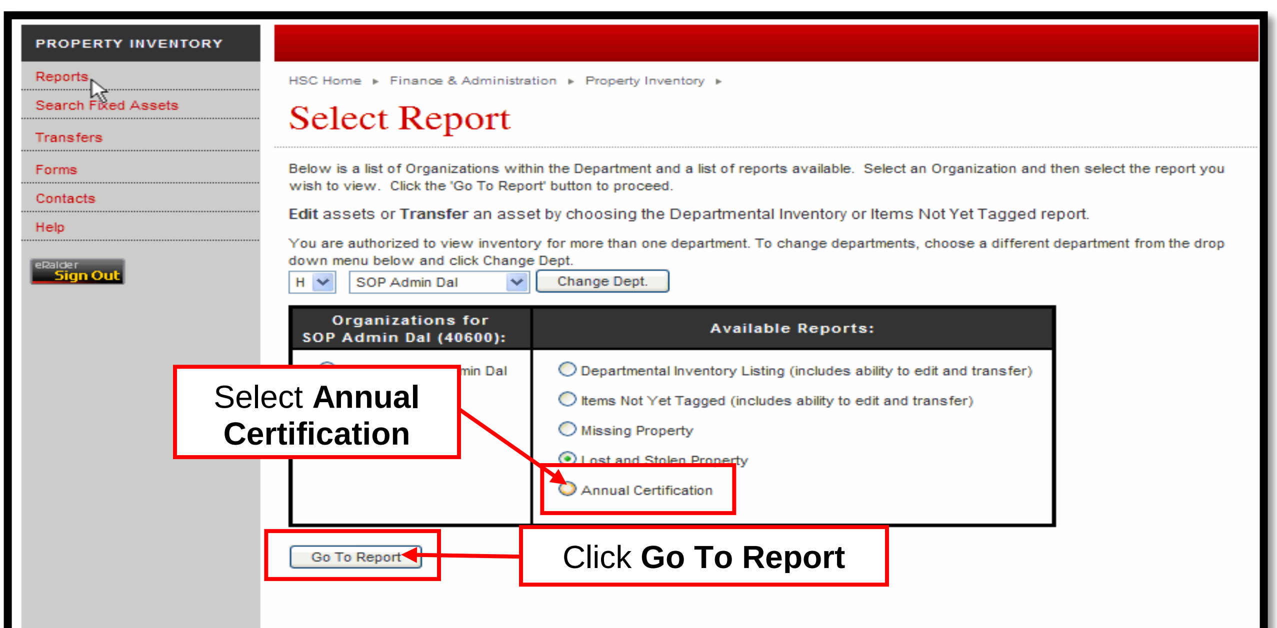


The **Lost and Stolen Property** page will display. If items on this list have been located, please notify Property Management at propertymanagement@TTUHSCEP.edu. After two years, the items that have been reported as missing are moved to the **Lost and Stolen Property** report and submitted to the State Comptroller's Office. If the amount of loss is substantial, TTUHSCEP could lose a proportional amount of state funding. Please make every effort possible to locate missing property before it is submitted to the State Comptroller's Office. You can print this report for your records by selecting the **Click here to get a PDF version of this report** link.

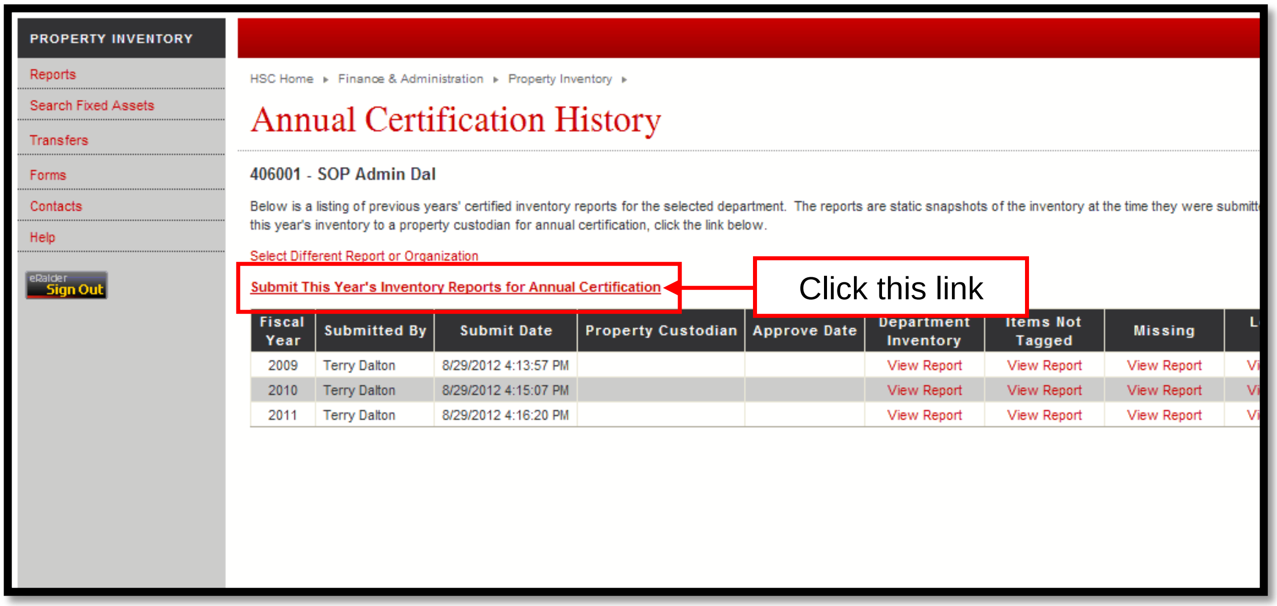
To proceed to the next step, click on the **Reports** link in the menu bar on the left side of the page.



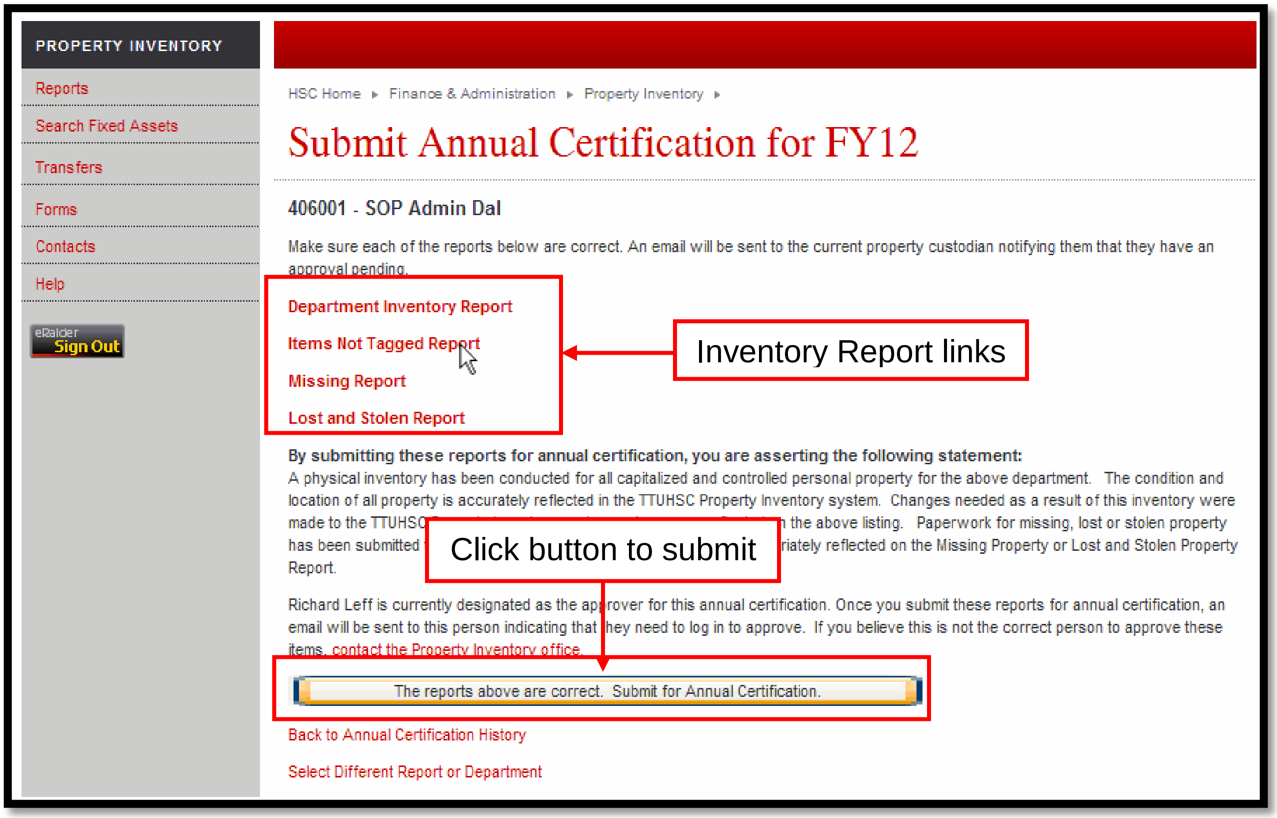
The **Select Report** page displays. After you have completed all edits and transfers, reported missing items, and verified that your **Departmental Inventory Listing** is correct, you are ready to submit this year's reports for certification. Please keep in mind that any changes that were submitted to Property Management could take several days to process and you must ensure these items are appropriately reflected on the reports. Select **Annual Certification** from the list of **Available Reports** and click on **Go To Report**.



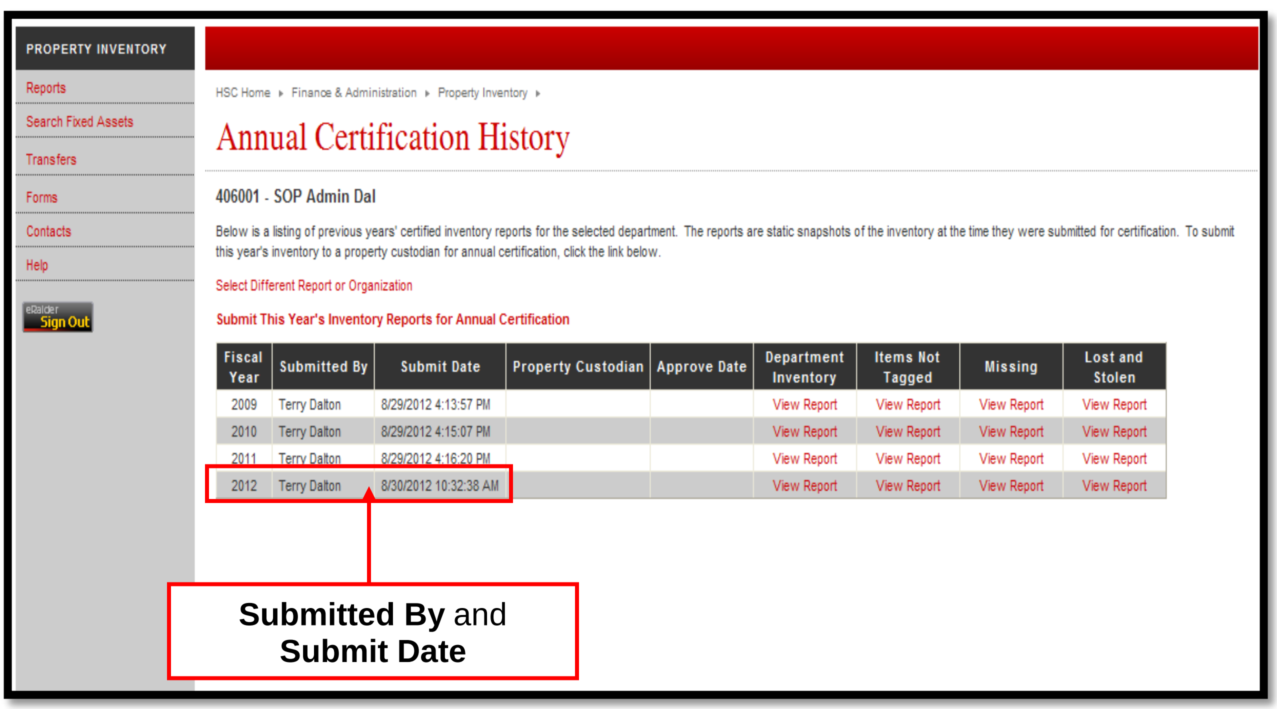
The **Annual Certification History** page displays. This page includes a listing of previous years' certified inventory reports for the selected Organization. Click on **Submit This Year's Inventory Reports for Annual Certification** link.



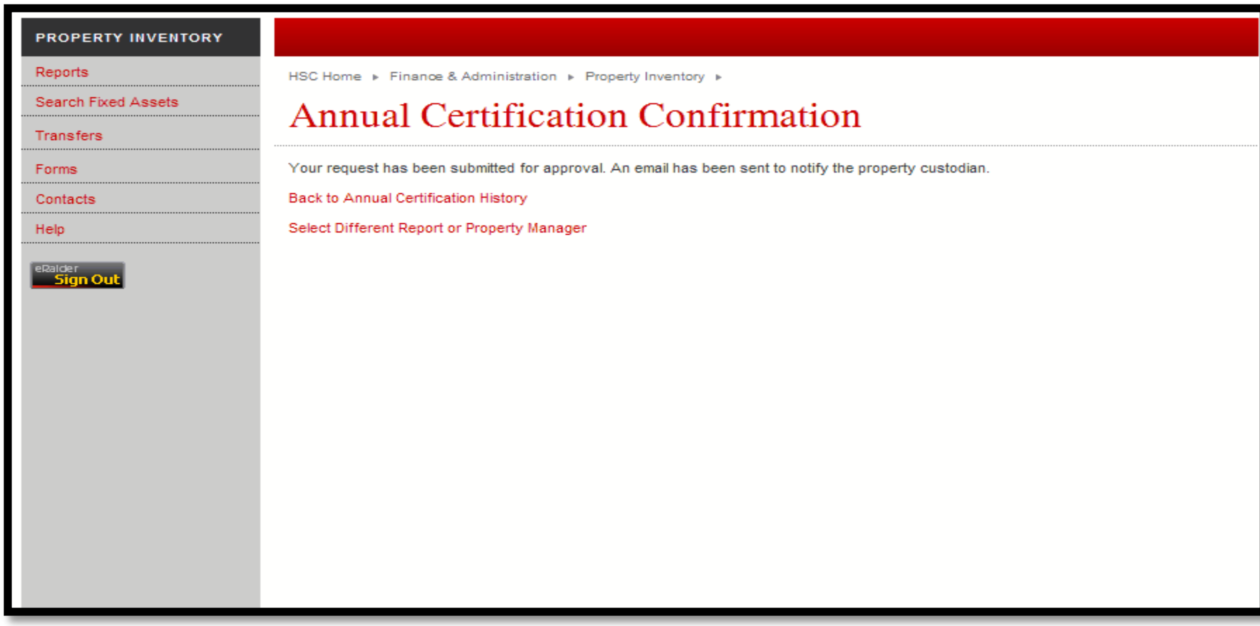
The **Submit Annual Certification** page displays. The top part of the page provides links to each of the inventory reports that will be submitted. Click on the links and make sure each of the reports is correct. The middle of the page contains a statement that you are asserting to when you submit your certification. It is important to read this statement and understand that you are affirming that the condition and location of all property is accurately reflected in the TTUHSCEP Property Inventory System. The bottom of the page lists the name of the person designated as the approver for the certification of the annual property inventory. If the person listed is not the correct person, contact Property Management. The bottom of the page also contains the button to submit the certification. After verifying the inventory is correct, click on **The Reports above are correct. Submit for Annual Certification** button.



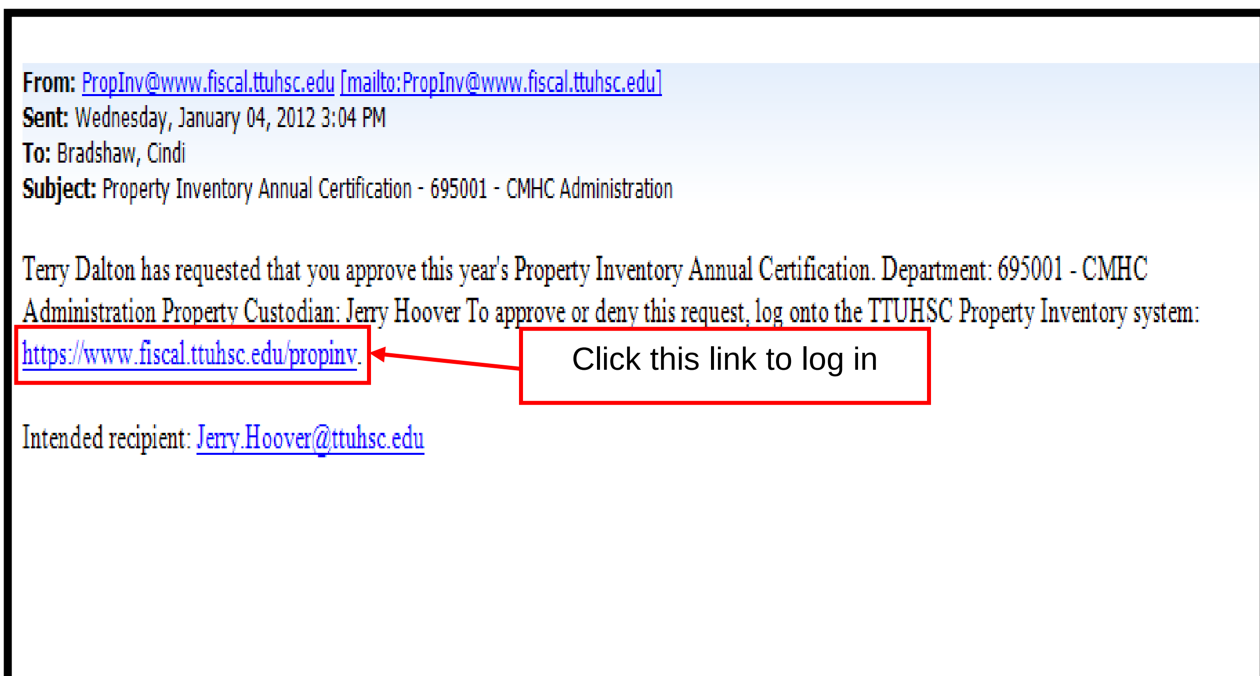
When the departmental inventory is submitted for certification, the submitter and the date the report was submitted will display on the **Annual Certification History** page.



The Confirmation screen confirms the Annual Certification has been submitted for approval.



An automated email is sent to the departmental property custodian to notify them that the inventory is ready for annual certification. When the property custodian receives the email notification, they must click on the link in the email and log into the TTUHSCEP Property Inventory System. Select **Certify the Annual Inventory** to approve the Property Inventory Annual Certification and complete the process.



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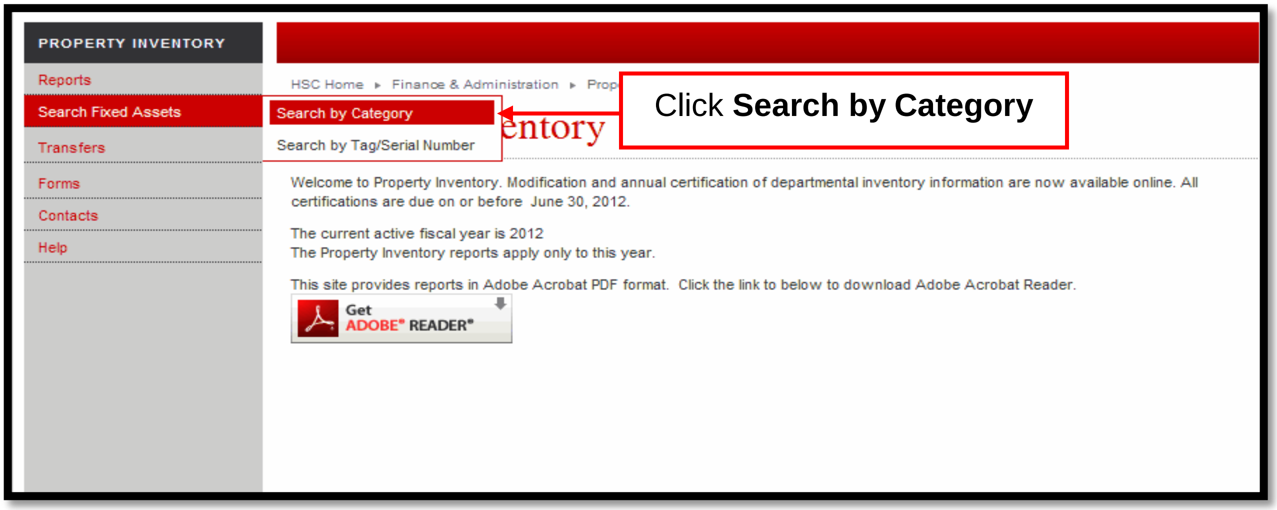
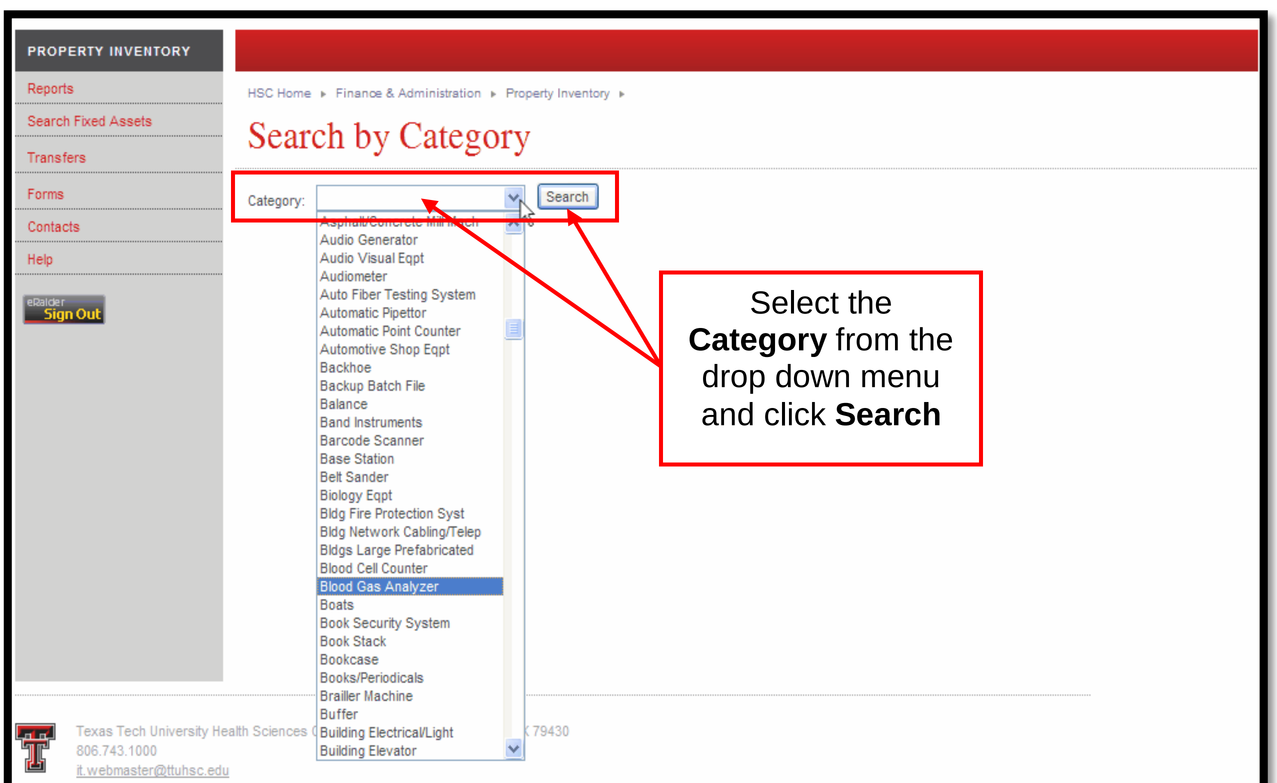
Search Fixed Assets

The Property Inventory System has two search options to search for Fixed Assets. You can **Search by Category** and **Search by Tag/Serial Number**. To search by category, select the **Search Fixed Asset** link from the menu bar on the left and click on **Search by Category**.



The **Search by Category** page displays. Select the **Category** from the drop down menu and click on **Search**.



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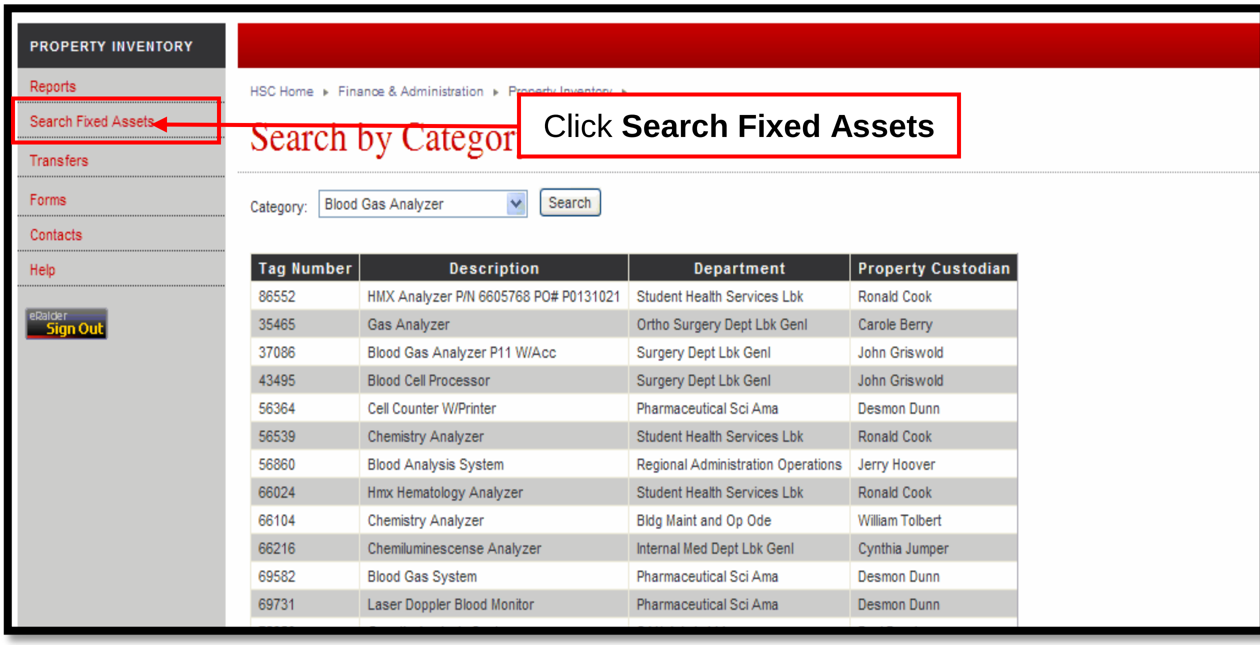
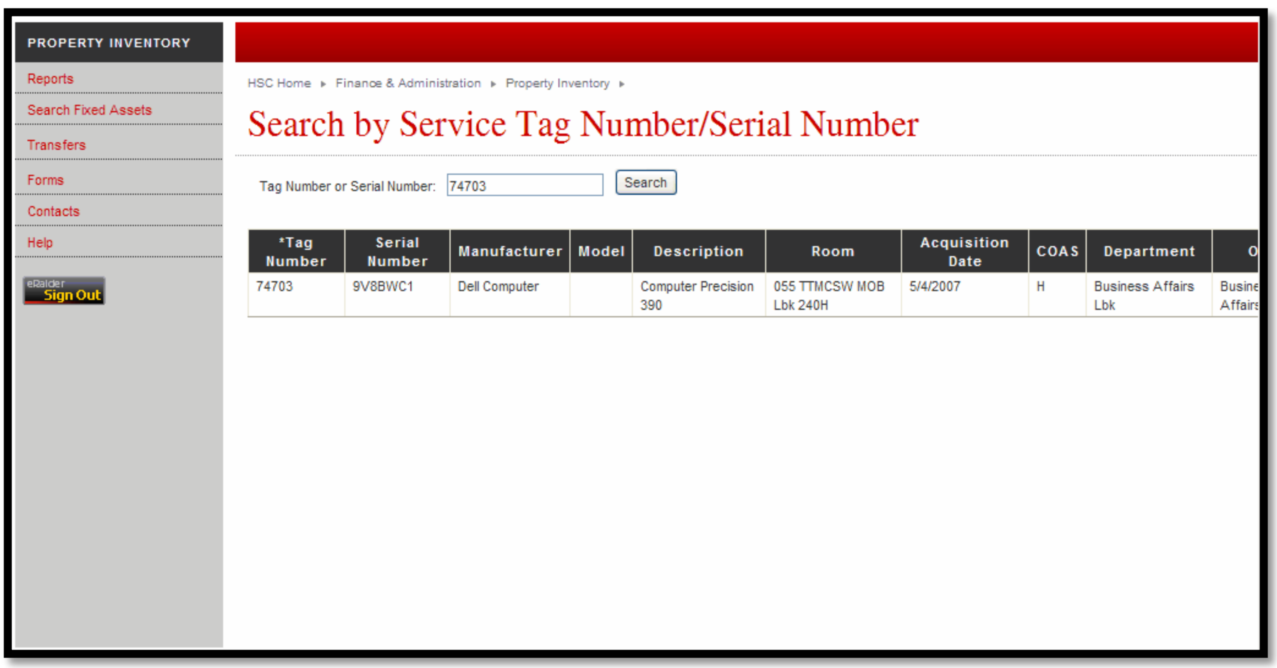
A list of all items at TTUHSCEP that are in the category selected will display with the **Tag Number**, **Description**, **Department** and **Property Custodian**. To continue to search fixed assets, click on the **Search Fixed Assets** link in the menu bar on the left side of the page.



The **Search Fixed Assets** page displays. If you find items in your department that are not on your inventory list, you can search by either tag or serial number to determine whose inventory list the item is on. It is possible that one department transferred an item to your department, but the documentation was not completed. Please notify Property Management if this is the case. To search by tag or serial number, click on the **Search By Tag or Serial Number** link.

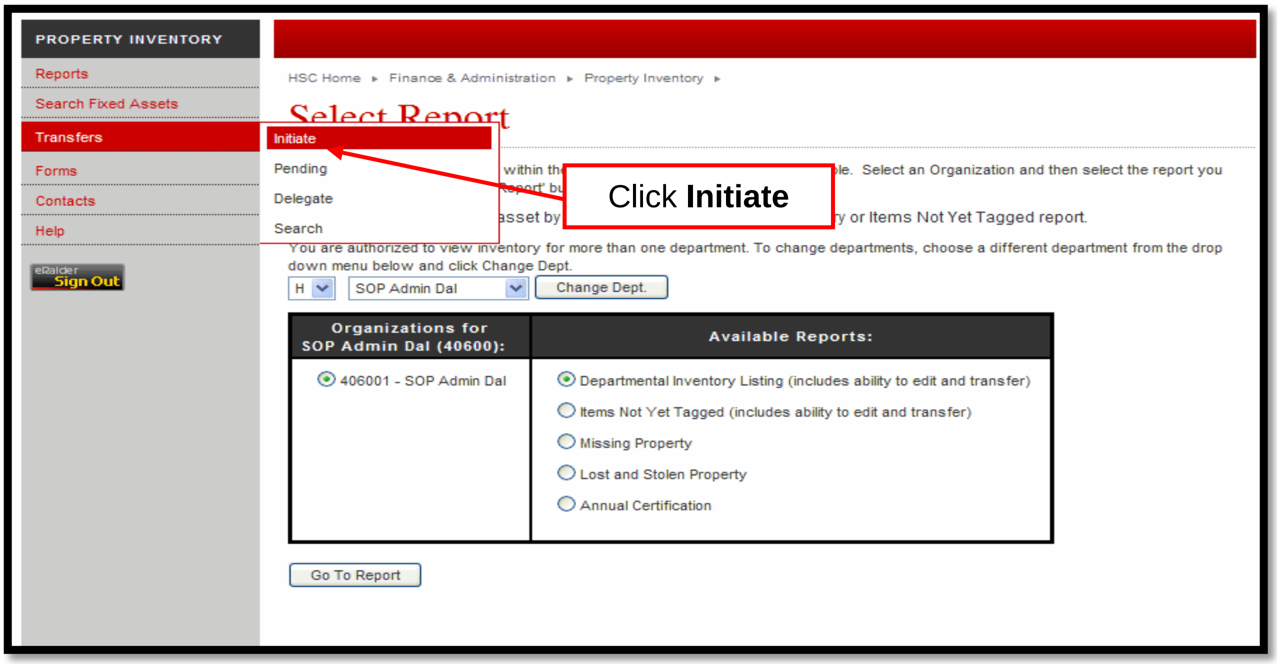
Enter the **Tag Number** or **Serial Number** and click on **Search**.

The search results will display with the **Tag Number**, **Serial Number**, **Manufacturer**, **Model**, **Description**, **Location (Room and Building)**, **Acquisition Date**, **Department**, **Organization**, and **Property Custodian**.

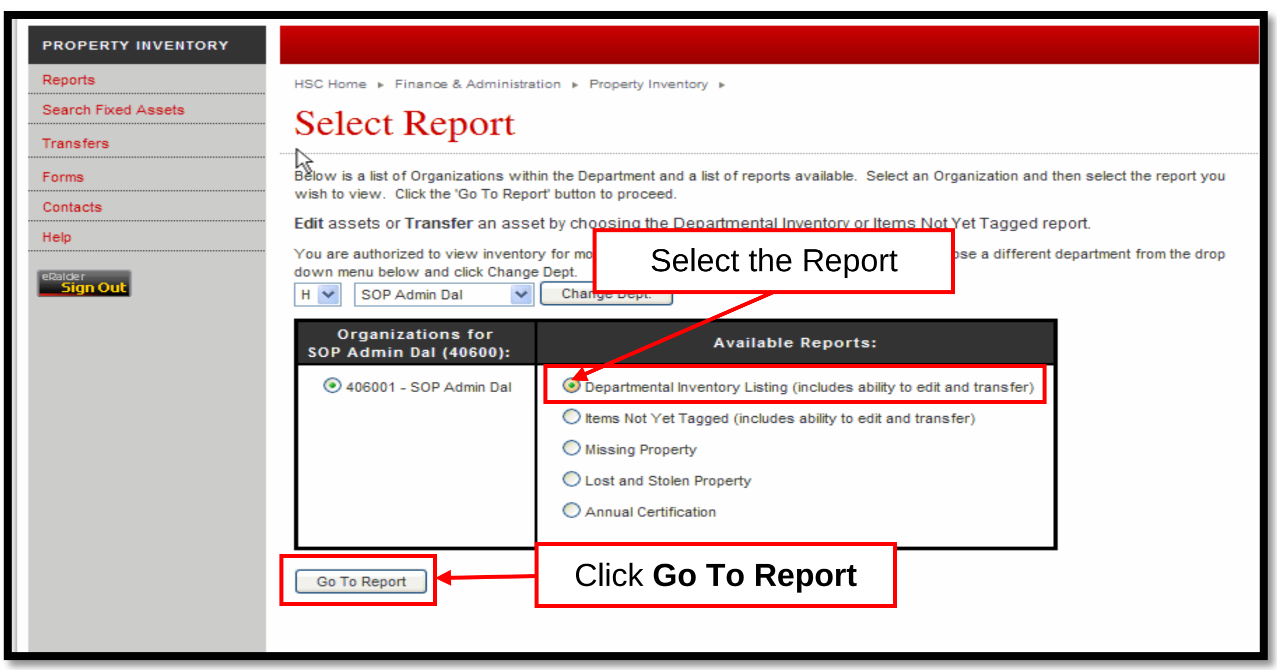


Transfers

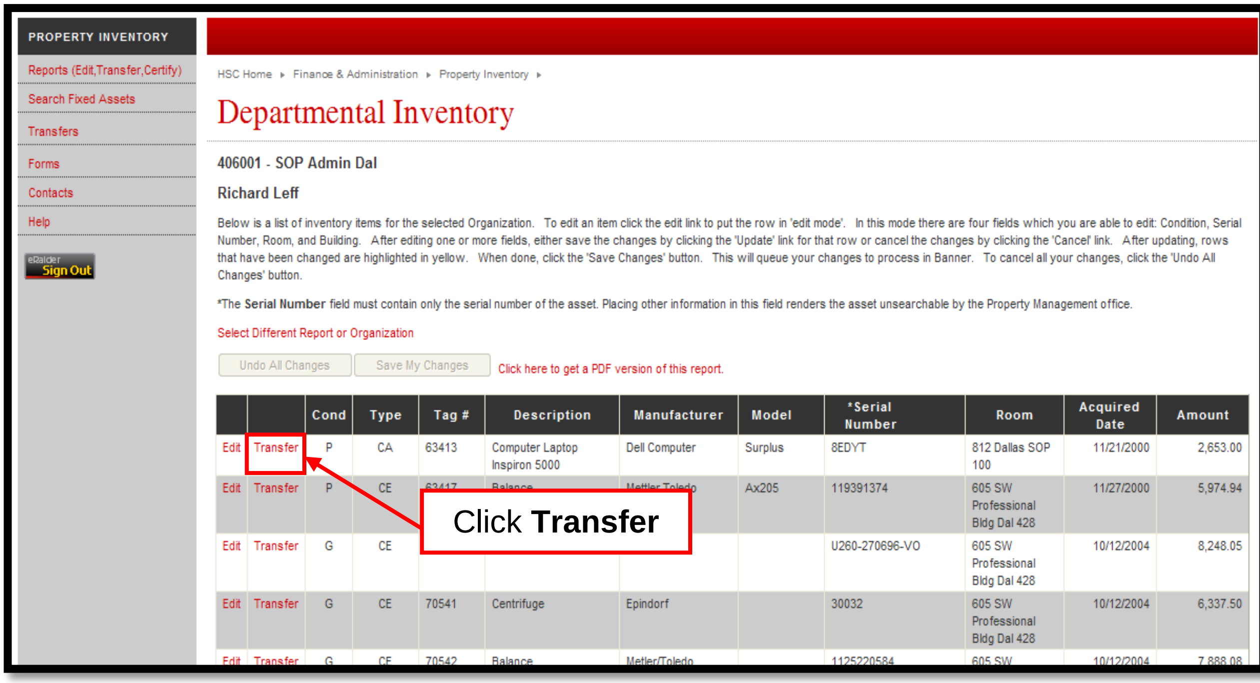
If during the verification process you have inventory items that need to be transferred to another department, select the **Transfers** link in the menu bar on the left side of the page and click on **Initiate**.



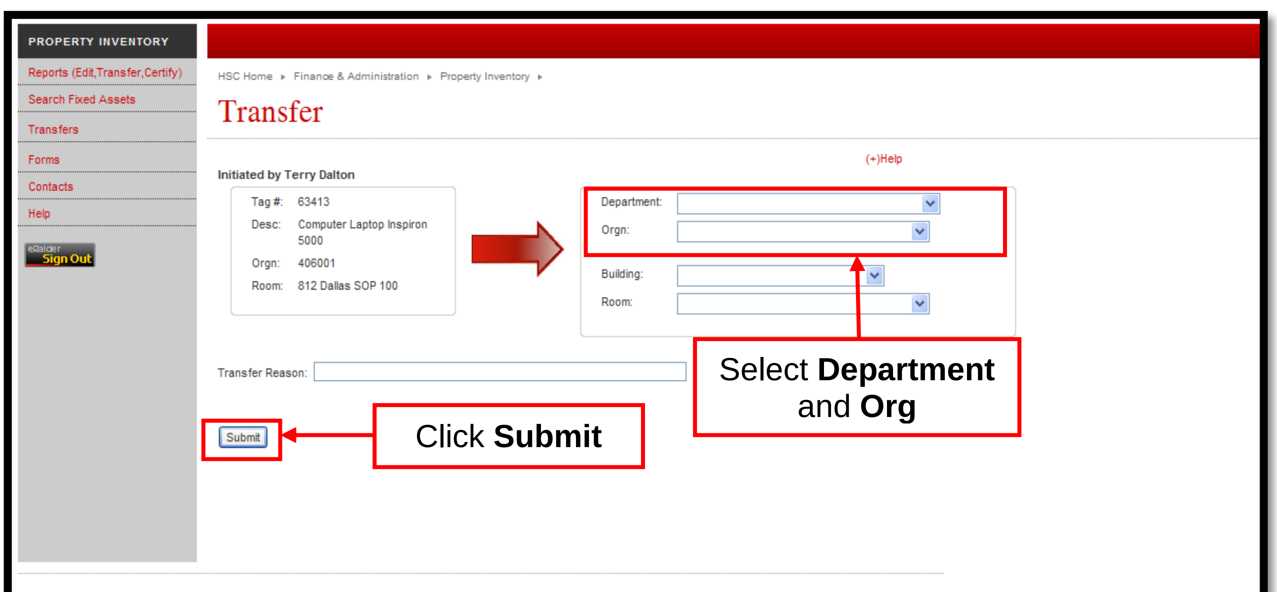
You can transfer an asset from the **Departmental Inventory Listing** or **Items Not Yet Tagged** Report. Select the report from the list of available reports and click on **Go To Report**.



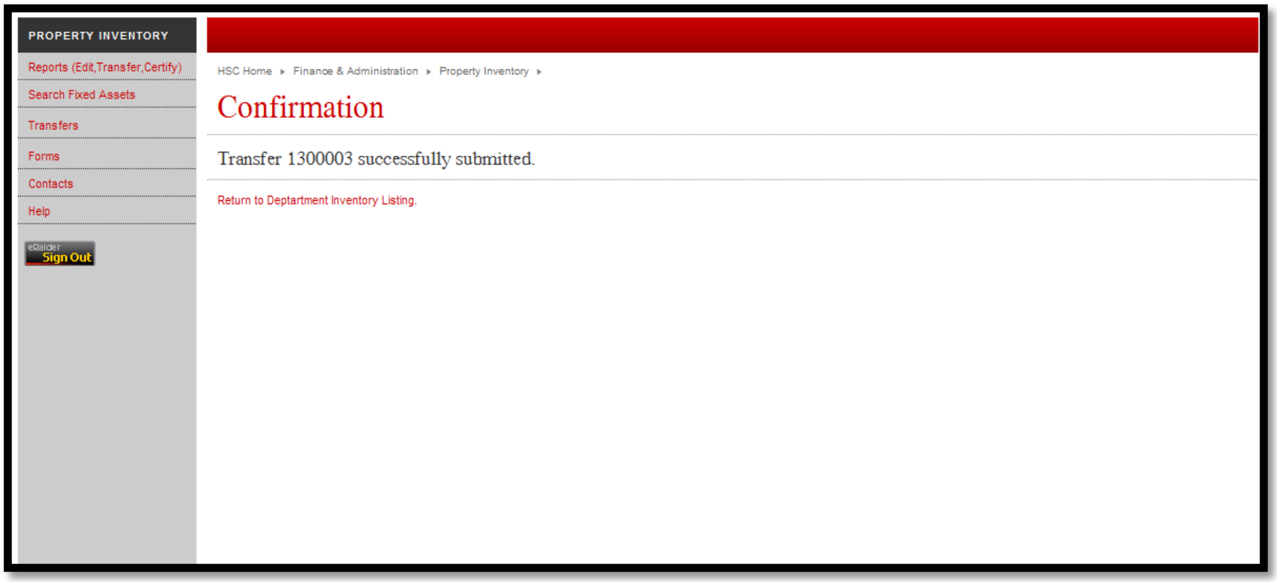
You can initiate a transfer by clicking on the red **Transfer** link located on the line item of the asset you wish to transfer.



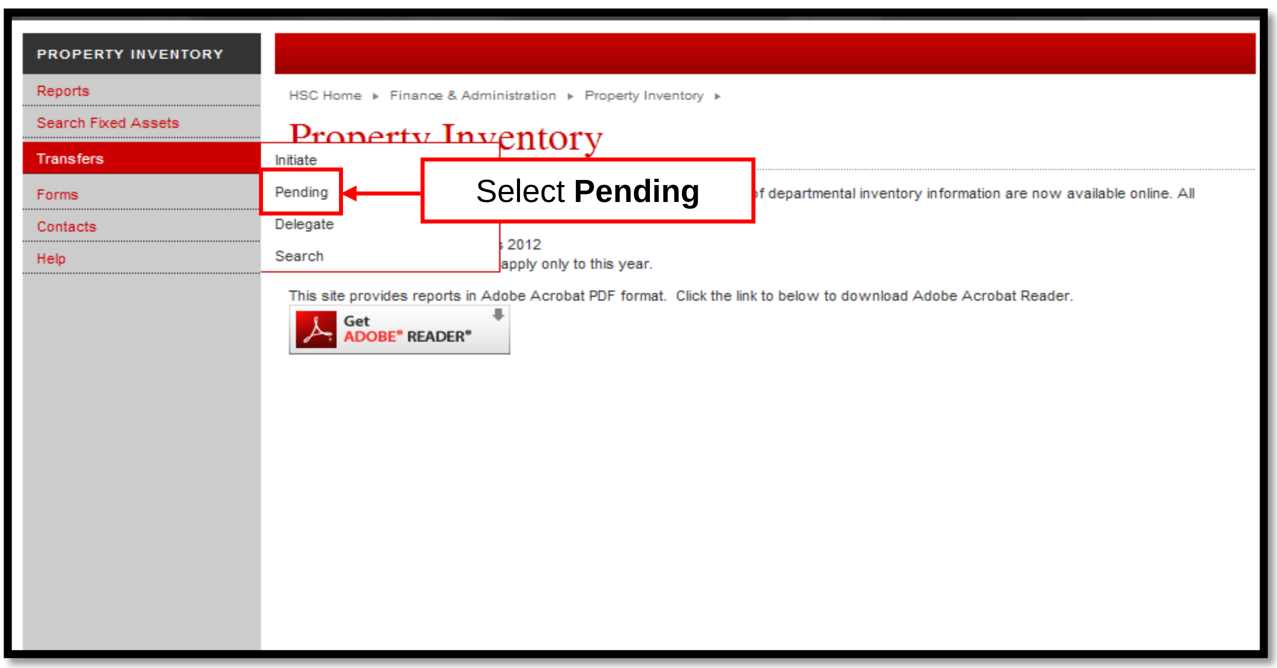
The Transfer page will be pre-populated in the left box with the Tag#, Description, Orgn and current Room location of the asset you have selected to transfer. Displayed in the right box are the Department, Orgn, Building and Room the asset is to be transferred to. The initiator must enter the Department and Orgn from the drop down menu for submission. The Building, Room and Transfer Reason may be entered at this point but are not required for submission. From the drop down menu, select the **Department** and **Orgn** and click on **Submit**.



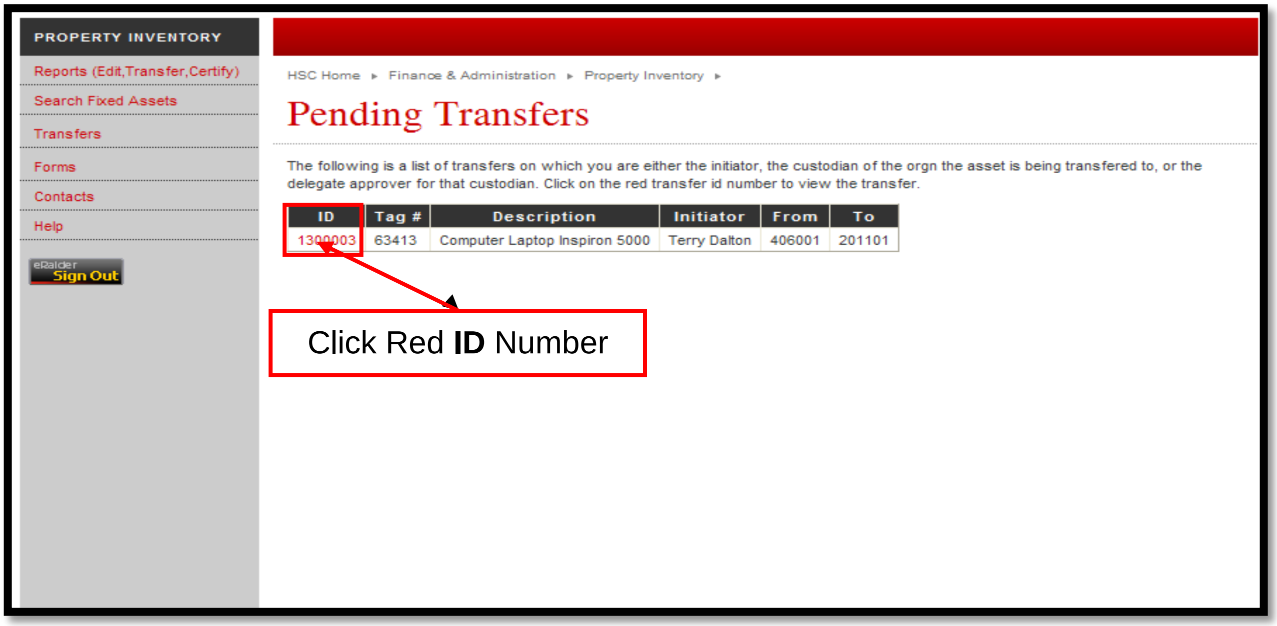
You will receive a Confirmation screen indicating the transfer has been successfully submitted and the Transfer Number will also be provided. An automated email is sent to the property custodian of the Department the asset is being transferred to.



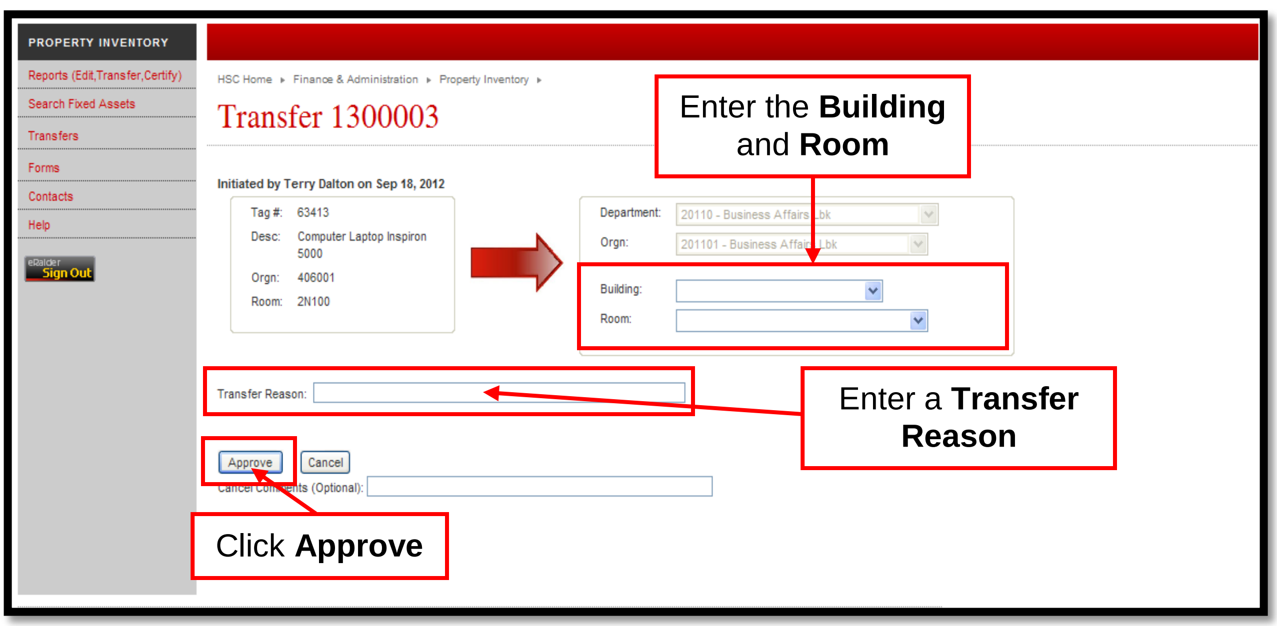
To view the transfer, mouse over the **Transfers** tab in the menu bar on the left side of the page and select **Pending**.



The Pending Transfers page will provide a list of transfers on which you are either the initiator, the custodian of the Department the asset is being transferred to, or the delegate approver for that custodian. Click on the red transfer **ID** number link to view the transfer.



If you are the initiator of the transfer you can cancel a transfer if the transfer is in a submitted status (not approved or rejected). Entering comments for the reason of cancellation is recommended but not required. When the initiator of a transfer cancels a transfer, an automated email will be sent to the property custodian. In some instances, the initiator of the transfer may also be the approver as the receiving department's property custodian or the custodian's delegate. To approve this transfer, enter the **Building** and **Room** from the drop down menu and enter a **Transfer Reason**. When completed, click on **Approve**.



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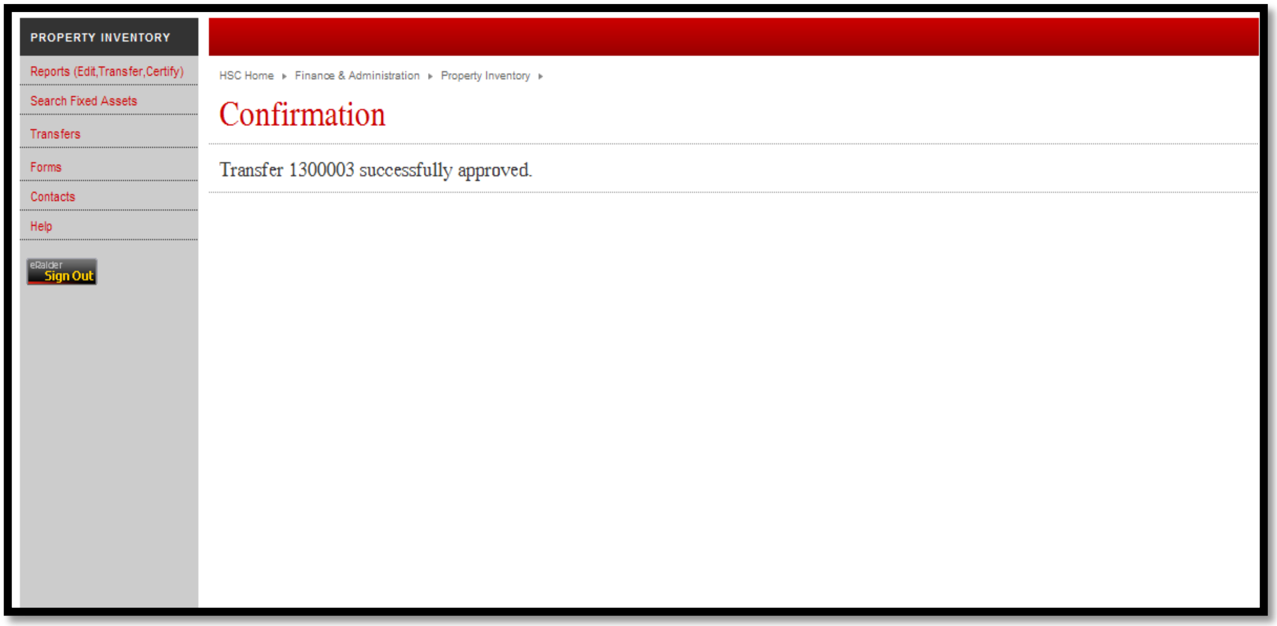
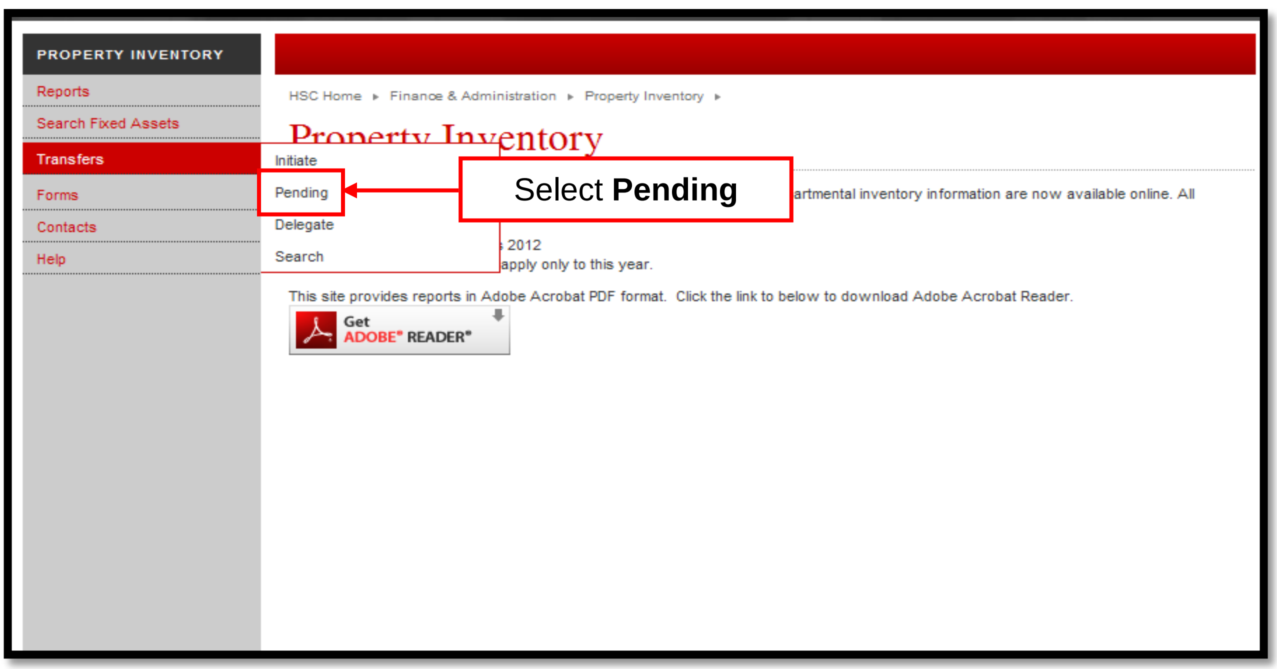
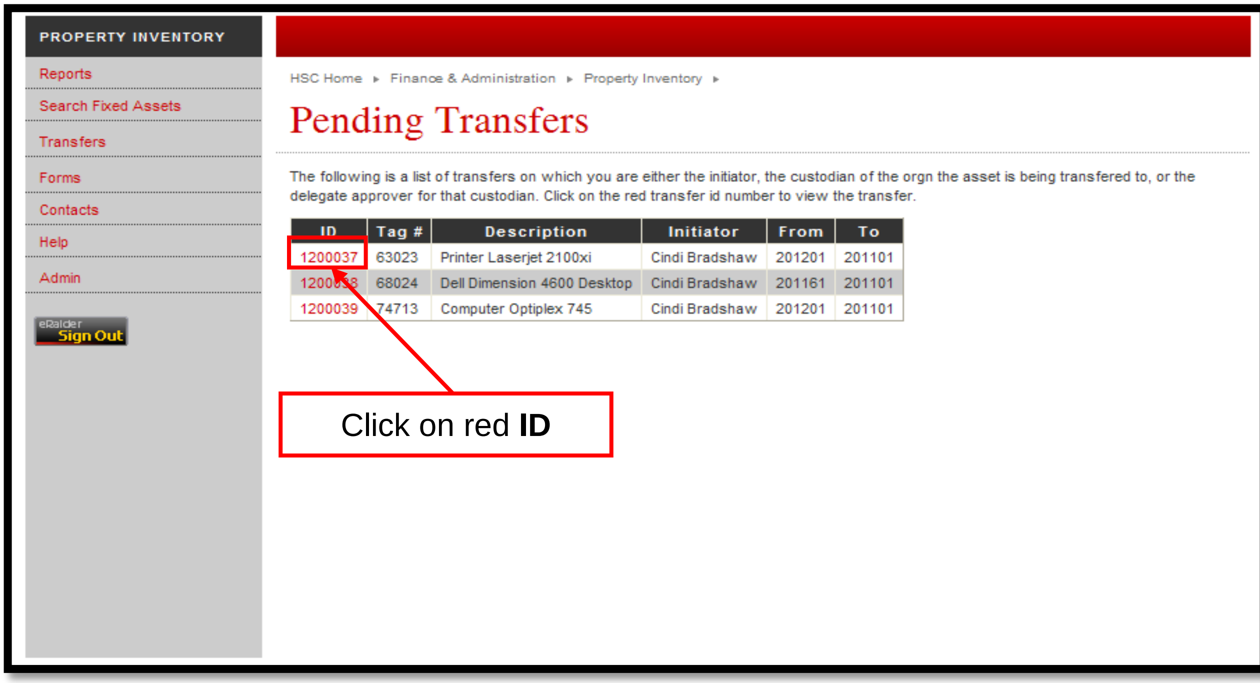
You will receive a confirmation screen indicating the transfer has been successfully approved. An automated email will be sent to the initiator when a transfer has been approved.



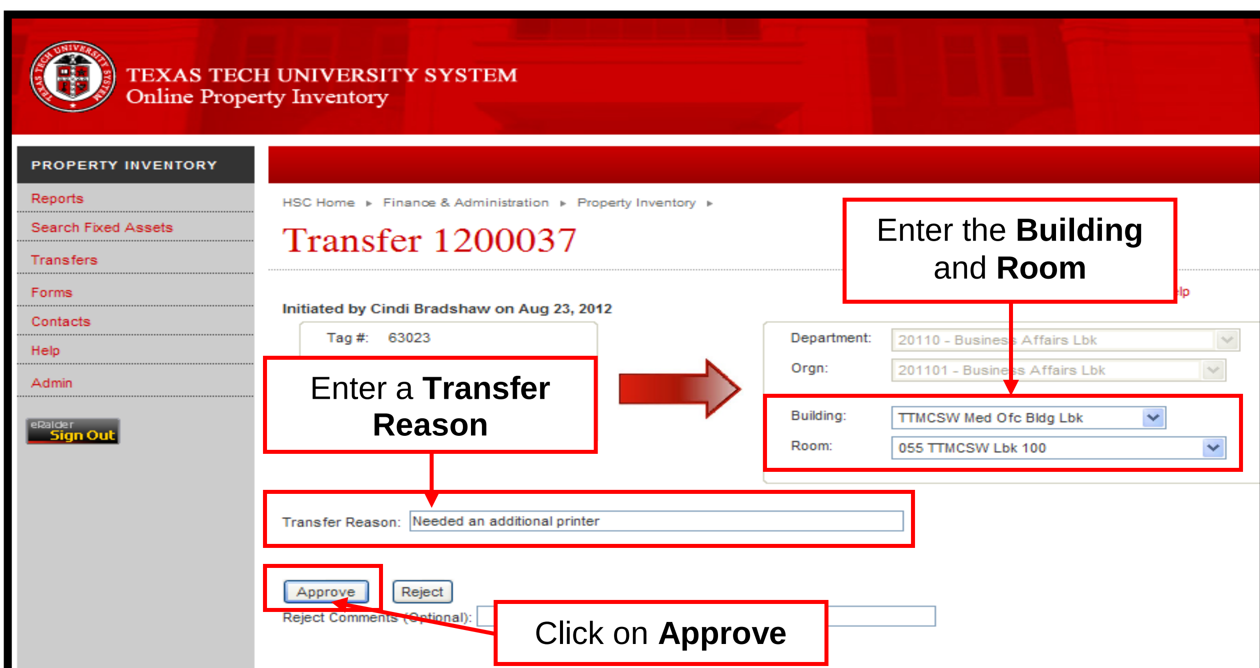
To view and approve transfers initiated to the Department where you are the property custodian or delegate approver, mouse over the **Transfers** tab in the menu bar on the left side of the page and select **Pending**.



On the Pending Transfers page, locate the transfer you wish to view and approve, and Click on the red transfer **ID** number link.



As the receiving department's custodian or custodian's delegate, you can reject a transfer by clicking on Reject if the transfer is in a submitted status (not approved or cancelled). Entering comments for the reason of rejection is recommended but not required. An automated email is sent to the initiator when a transfer is rejected. To approve this transfer, enter the **Building** and **Room** from the drop down menu and enter a **Transfer Reason**. When completed, click on **Approve**.



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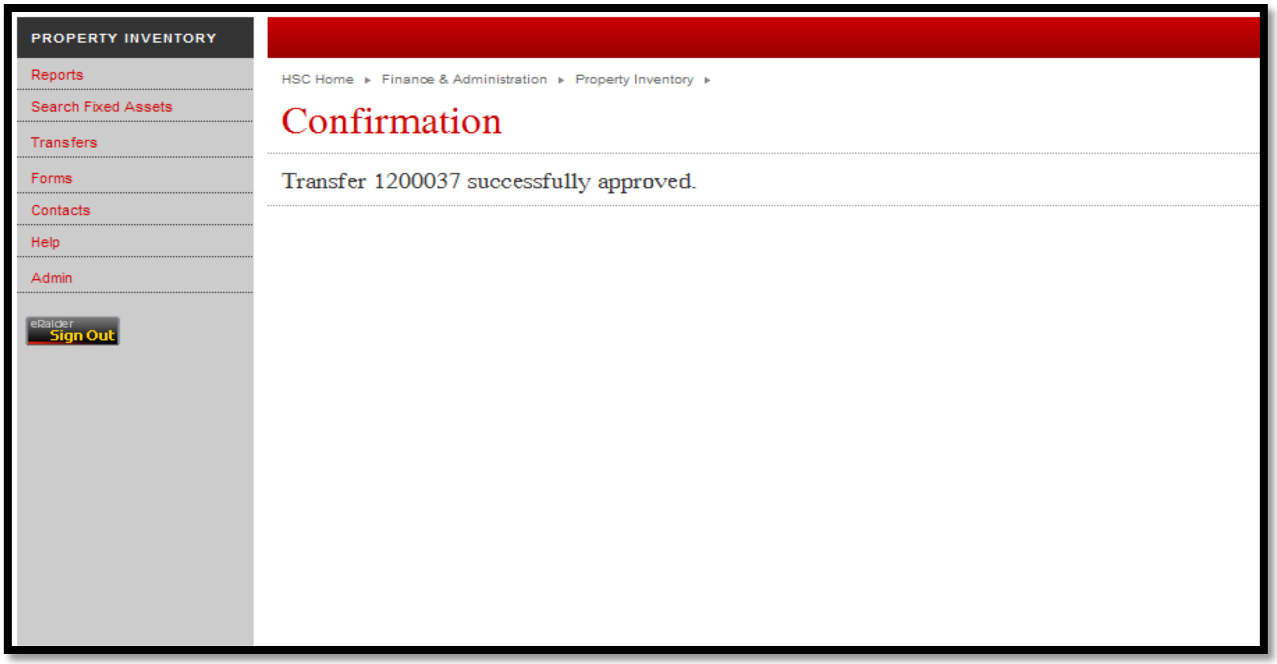
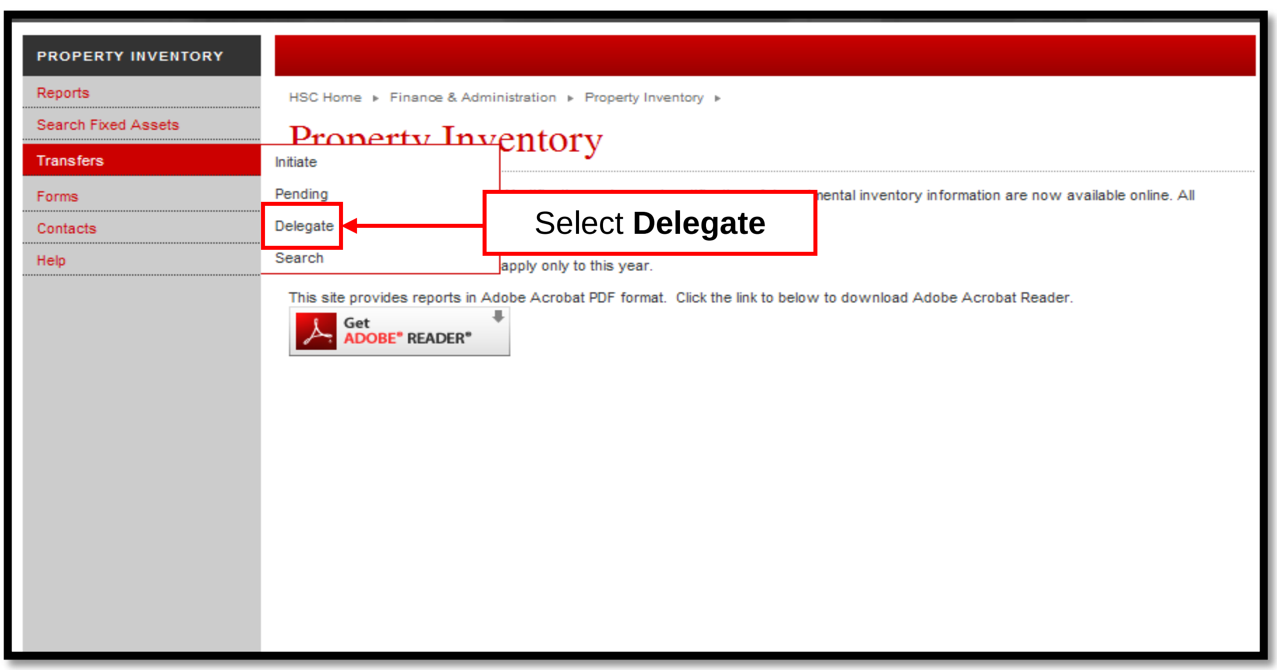
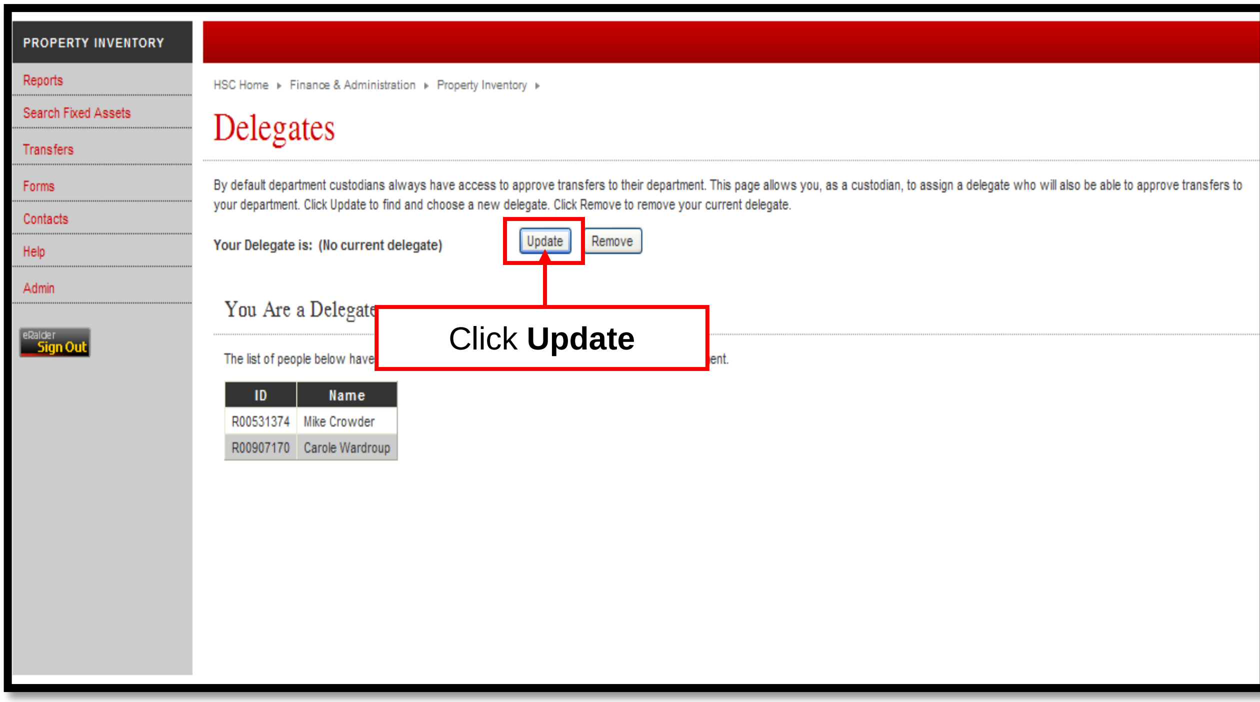
You will receive a confirmation screen indicating the transfer has been successfully approved. An automated email will be sent to the initiator when a transfer has been approved.



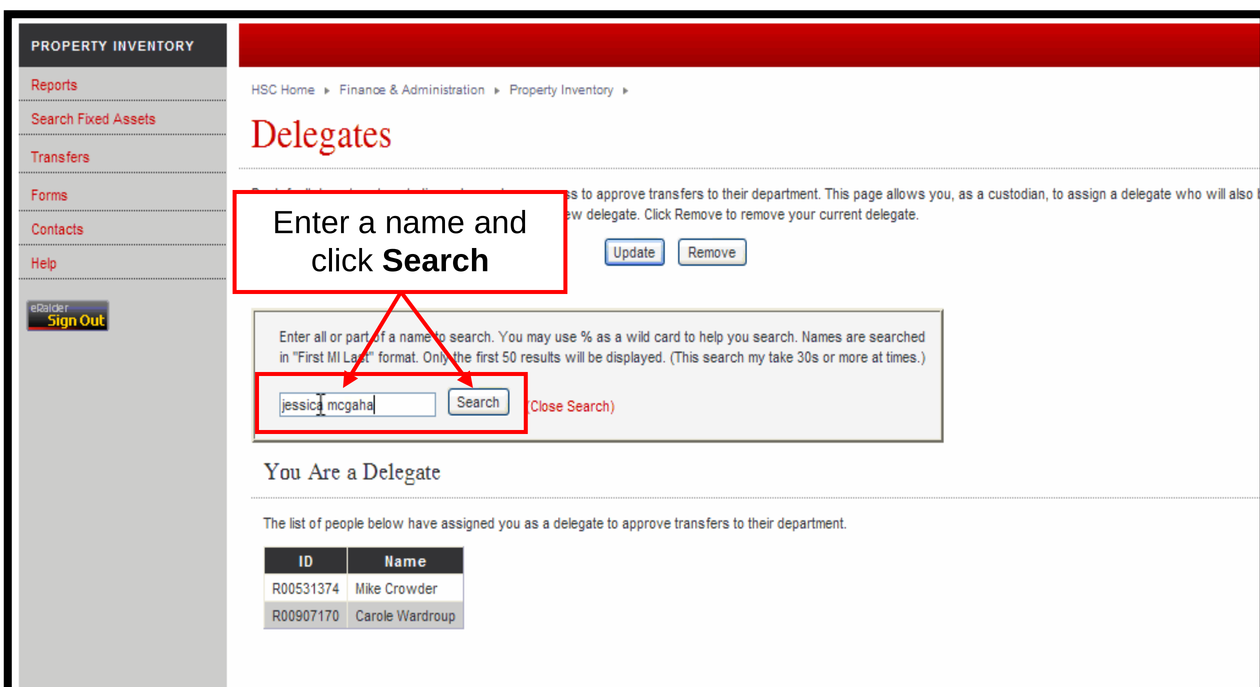
Department custodians by default always have access to approve transfers to their department. As the custodian, you are able to assign a delegate who will also be able to approve transfers to your department. The Delegates page will allow you to assign a delegate. To access the Delegates page, mouse over Transfers in the menu bar on the left side of the page and select Delegate.



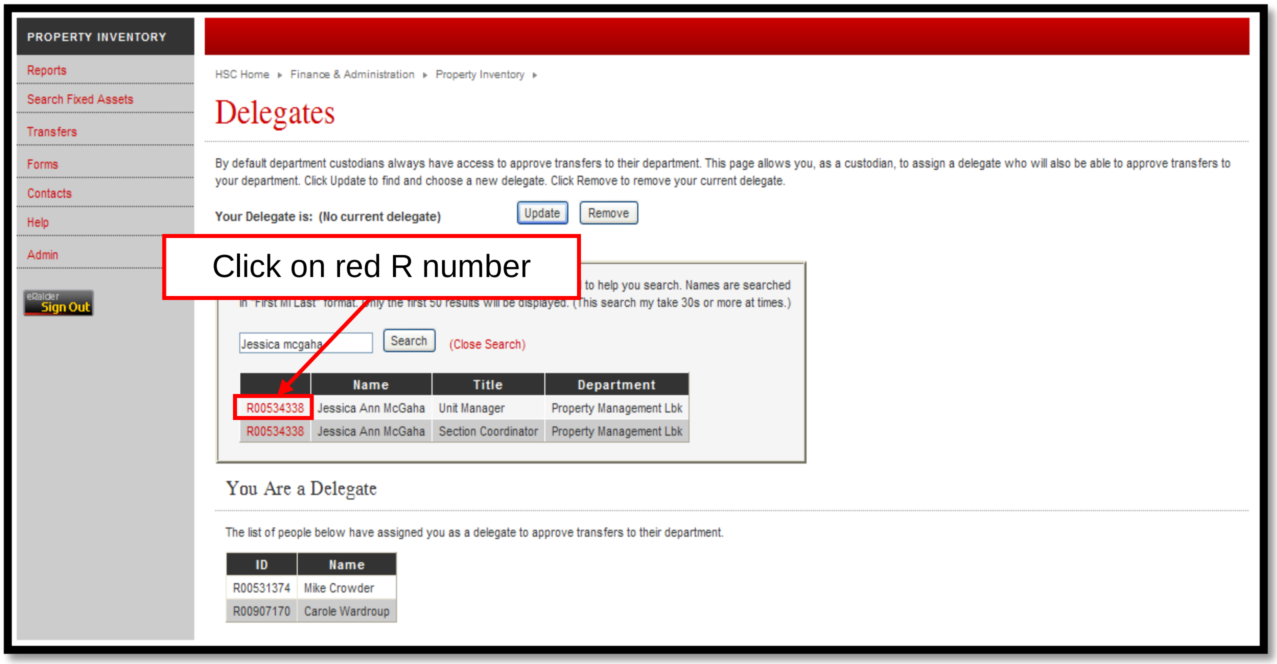
On the Delegates page, you can find and select a new delegate by clicking on **Update**. To remove a current delegate, click on **Remove**.



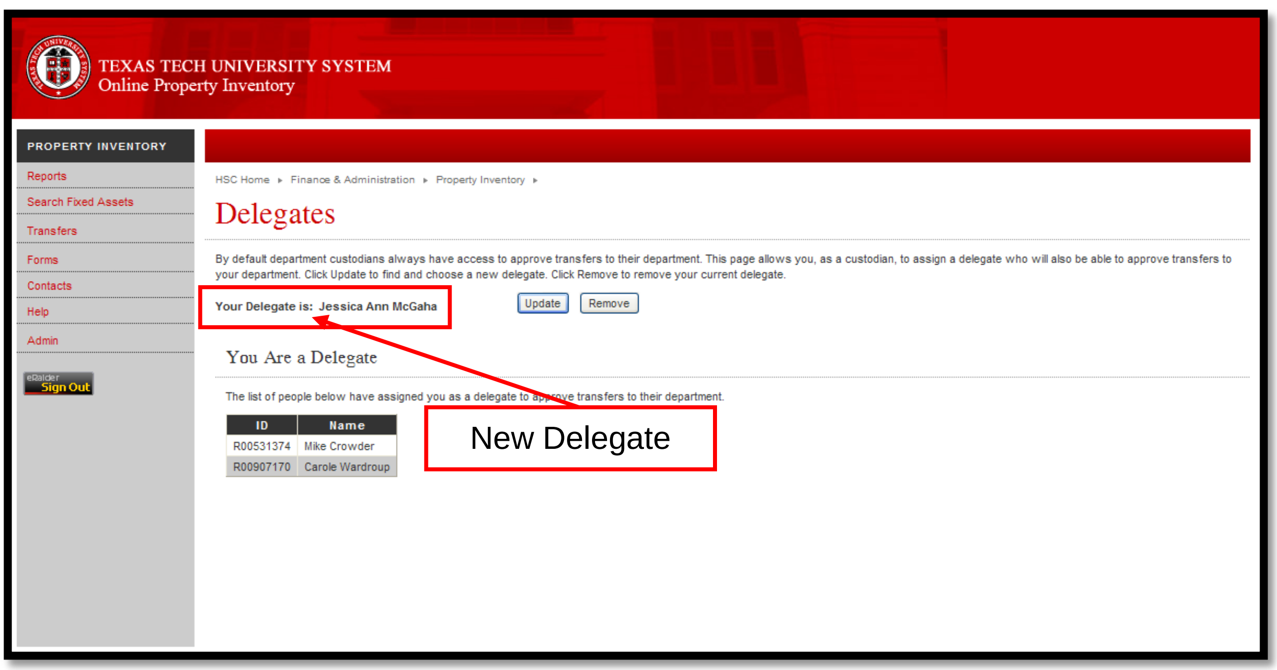
Names are searched in “First, MI, Last” format. You may use the percent symbol (%) as a wild card to help you search. Enter all or part of a name to search and click on **Search**.



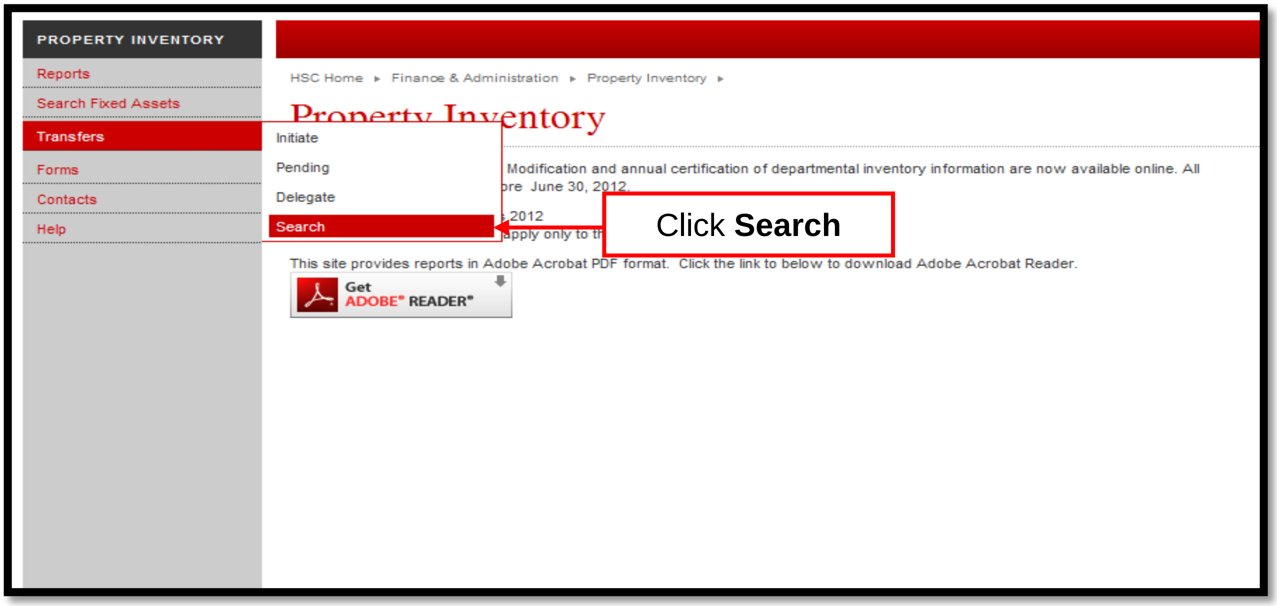
Select the delegate by clicking on the red R number link.



The new delegate will now be assigned.

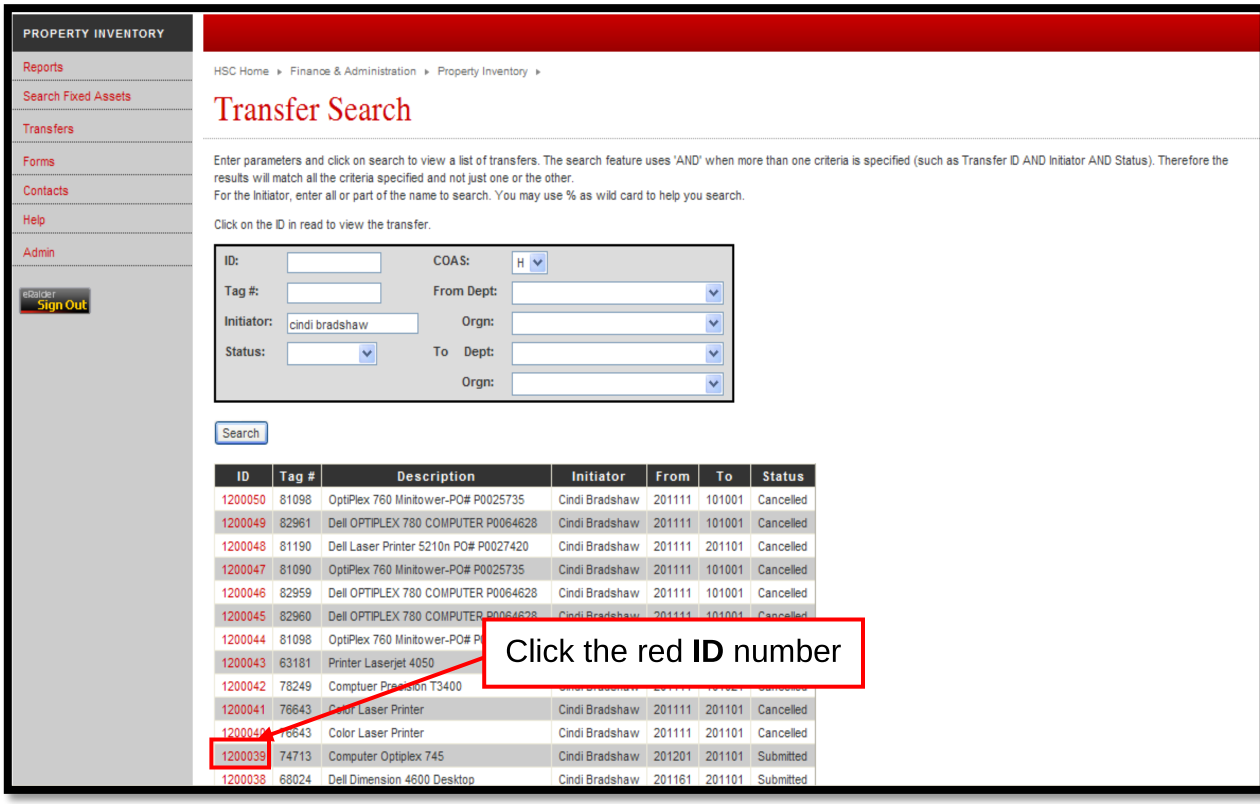


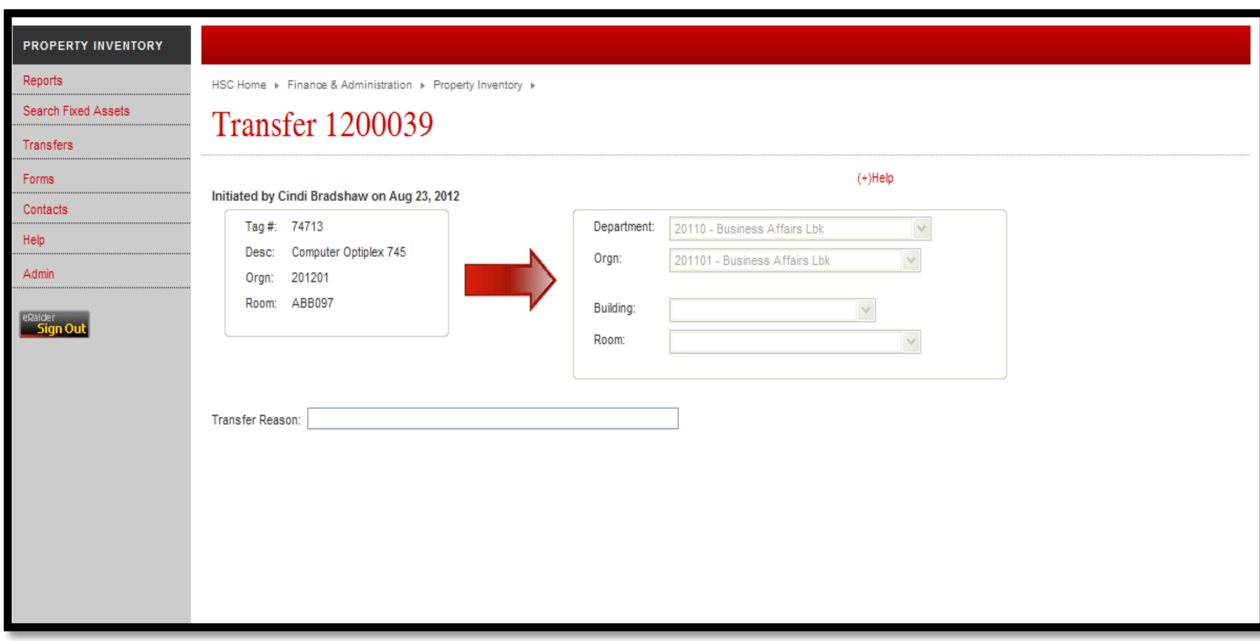
To search for a Transfer, mouse over **Transfers** in the menu bar on the left side of the page and click on **Search**.



On the Transfer Search page, you can enter parameters to view a list of transfers. The search feature uses "AND" when more than one criteria is specified, so the results will match all the criteria specified and not just one or the other. For the initiator, enter all or part of the name to search. You may use the percent symbol (%) to help you search. Enter the desired search criteria and click on **Search**.

Click on the red **ID** number link to view the transfer.





For additional information, please contact Property Management at propertymanagement@TTUHSC.edu or by calling Cindy Collazo at 915-215-4512 or Jennifer Meinberg at 915-215-4515.