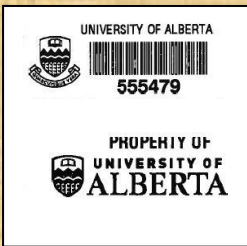




Moveable Equipment Asset Management

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:
eilst@ualberta.ca

Surplus Services

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

Email:
smssurplus@ualberta.ca

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

To gain access to the module, complete the [Request for Financials Access](#) form. Send the completed form to your department's PeopleSoft designate. Asset Management queries begin with "ZAM". Separate query access is required to make use of those queries (ZZZ_QUERY_VIEWER). User access can be requested under "Additional Roles or Comments" by entering "ZAM_EQUIP_ENTRY." Users will be able to enter asset records one at a time in the module or they can be entered into an upload template that would be submitted to Equipment Services (ES) to complete the upload. To get the template please contact ES. For instructions on how to use the Asset Management Module please see the manual available in [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 3-5 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 (2007 – 2017)
- 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)

Moveable Equipment Asset Management

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.

Spring/Summer 2017

Beginning May 1, 2017 Supply Management Services will perform 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 verify which assets should remain active in the central inventory system. Equipment Services will focus on Professional Expense Reimbursement (PER) purchases and equipment less than 10 years old with a value => than \$5,000.

Equipment Services will 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.

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.

Disposals/Forms

The University has various procedures for disposing of equipment assets that are no longer needed by departments. This applies to all assets whether tracked or not tracked. Examples of equipment disposals (and appropriate forms) are:

Old/Unused equipment – [Surplus Disposal Form](#)

Equipment Sales – [Surplus Disposal Form](#) (indicate intention of selling)

Equipment being transferred or sold from one University Unit to another – [Transfer or Sale \(Internal\) to Another University Unit](#) and [Market Evaluation Form](#)

Equipment leaving with departing staff member – [Direct Sale to Departing Staff](#) and/or [Gift to Staff Member](#)

Equipment going to another institution with or without a professor – [Request to Transfer Equipment to Another Institution](#) as well as [Confirmation of Acceptance of Equipment From the University of Alberta](#)

Donating equipment – [Donation to Registered Charity](#)

Lost or stolen equipment – [Form](#)