



# Description

The Equipment Inventory dashboard page is a database for equipment inventory on campus. There are several prompts used to sort and view equipment inventory. This dashboard also includes all of the specific information for each asset including cost, employee name, organization, tag number, PO, and the asset description.

Use Equipment Inventory:

- To view a listing of fixed assets
- To complete quarterly and biennial inventory reviews
- NOTE: Equipment Inventory replaces the Fixed Assets dashboard

Finance			Home Catalog	Favorites   Dashboards
Lookups General Ledger Grants Purchasing Equip	nent Inventory			
Prompts				
Book Type         Organization         Org           ✓ FMS CORP BOOKS         -Select Value ▼         -S           □ SPONSOR EQUIP         -S         -S	anization Name * ORG Parent Level ORG Parent Level ORG Parent Level C - Select Value-	nt #/Desc Building Name Room /alue ▼Select Value ▼Select V	alue 🔻	
Serial Number	Tag Number Asset Num	iber PO Number	Cost	
Employee Name	Category Description	Asset Description	Date Placed in Service	
is equal to / is in	▼ is equal to / is in ▼Select	Value  value	Between	Î
Only Show Assets Assigned to Terminated Employee <ul> <li>N OY</li> </ul>	S			Apply Reset

Prompts	Definition
Book Type	The Book Type separates items that are Ohio University owned (green tag) or sponsored equipment (red tag).
Organization	Is the 6-digit number that represents and organization. Search and review all of the assets assigned to a specific organization.
Organization Name	If you do not know the 6-digit organization number, you can look up the inventory list by organization name.
*ORG Parent Level	Review inventory listing by Org Parent Level.
ORG Parent # Desc.	Review Inventory by Org Parent Description.
Building Name	Review inventory located in specific buildings.
Room	Review inventory by a specific room number.
Serial Number	Lookup an asset by serial number.
Tag Number	Lookup an asset by assigned tag number.
Asset Number	Lookup an asset by assigned asset number.
PO Number	Lookup assets by the PO used to purchase.
>=Cost	Lookup assets greater than or equal to a specific cost.
Employee Name	Lookup assets assigned to specific Ohio University Employees.
Category Description	View assets by category description.
Asset Description	Lookup assets by description.
Date Placed in Service	Lookup assets based off the date they were added to Equipment Inventory.
Only Show assets Assigned to Terminated Employees	Filter asset listing to only show assets that are assigned to employees no longer at the university

## **Equipment Inventory in Use**

The following example is searched by prompt "Organization" number **100060.** 

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lajor Cate	egory Sub1 Category Sub2	Date Placed in Service	Cost	Employee Name	Employee Number	Organization	Organization Name	Planning Unit	Building Desc	Room Number	Tag Number	Part Number	License Plate Number	PO Number	In Use Flag
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Use any of the above prompts to review the inventory. Common uses will be for quarterly and biennial inventory reviews.

- 1. Make sure the book type prompt is correct. By default, the book type is set to "FMS CORP BOOKS". This is for green-tagged equipment. Please use "Sponsor Equip" for red tag items.
- 2. Type in your org number in the prompt "Organization".

#### Click Apply.

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After clicking the Excel dropdown, the file will download. Use this file to review inventory or submit changes to existing inventory.

If you only have partial information, you can use the search function by clicking the down arrow and clicking search. This can be used for any prompt.

# **Equipment Inventory**



Type in the known information and click search. Move the values you want to search to the right and hit ok. This will select the items moved to the right. Hit apply on the dashboard (follow steps on page 2).

### Dashboard Page Columns (on screen)

Asset Number, Asset Description, Major Category, Category Sub1, Category Sub2, Date Placed in Service, Cost, Employee Name, Employee Number, Organization, Organization Name, Planning Unit, Building Desc, Room Number, Tag Number, Part Number, License Plate Number, PO Number, In Use Flag, Life in Years.

### **Additional Fields Included**

Building Number, Campus, State, SE Asset Name, SE Date Acquired, SE Date Posted, SE Grant/Contract No., SE CFDA, SE Agency, SE UIM, Current Units, Comments.