



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

The screenshot shows the 'Equipment Inventory' dashboard under the 'Finance' tab. It features a navigation menu with 'Lookups', 'General Ledger', 'Grants', 'Purchasing', and 'Equipment Inventory'. The main area is titled 'Prompts' and contains several search filters:

- Book Type:** Radio buttons for 'FMS CORP BOOKS' (checked) and 'SPONSOR EQUIP'.
- Organization:** A dropdown menu.
- Organization Name:** A dropdown menu.
- *ORG Parent Level:** A dropdown menu with 'C' selected.
- ORG Parent #/Desc:** A dropdown menu.
- Building Name:** A dropdown menu.
- Room:** A dropdown menu.
- Serial Number:** A dropdown menu with 'is equal to / is in' selected.
- Tag Number:** A dropdown menu with 'contains any' selected.
- Asset Number:** A text input field.
- PO Number:** A dropdown menu with 'is equal to / is in' selected.
- Cost:** A text input field with '>=' operator.
- Employee Name:** A dropdown menu with 'is equal to / is in' selected.
- Category Description:** A dropdown menu with 'is equal to / is in' selected.
- Asset Description:** A dropdown menu with 'contains any' selected.
- Date Placed in Service:** A date range selector with 'Between' and calendar icons.

 At the bottom, there is a checkbox for 'Only Show Assets Assigned to Terminated Employees' (set to 'N') and 'Apply' and 'Reset' buttons.

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

Equipment Inventory in Use

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

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
48116	Konica Minolta MS 600 MKII Digital Microform Scanner	MOVABLE EQUIPMENT	SCIENTIFIC AND RESEARCH	OTHER SCIENTIFIC	06/14/2010	\$12,145.00	Muhammad, Robin	134610	100060	AFRICAN AMERICAN STUDIES	ARTS AND SCIENCES	31 SOUTH COURT	140	298860	IDT4366		PCJOHN050310	YES	12

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**.

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
48116	Konica Minolta MS 600 MKII Digital Microform Scanner	MOVABLE EQUIPMENT	SCIENTIFIC AND RESEARCH	OTHER SCIENTIFIC	06/14/2010	\$12,145.00	Muhammad, Robin	134610	100060	AFRICAN AMERICAN STUDIES	ARTS AND SCIENCES	31 SOUTH COURT	140	298860	IDT4366		PCJOHN050310	YES	12

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

1

2

Finance Lookups

GL Funds Available Grants Funds Available Transaction Export Segment Lookup Object Lookup

Prompts

Book Type
 FMS CORP BOOKS
 SPONSOR EQUIP

Organization: --Select Val--
Organization Name: --Select Value--
Planning Unit: --Select Value--
Building: --Select Value--

Serial Number: is equal to / is in
Employee Name: is equal to / is in

Tag Number: contains any --Select Value--
Category Description: is equal to / is in --Select Value--

Equipment Inventory

Asset Number	Asset Description	Major Category	Category Sub1
49116	Konica Minolta HS 600 MKII Digital Microform Scanner	MOVABLE EQUIPMENT	SCIENTIFIC AND RESEARCH

Select Values

Available

Name: Starts
Search
 Match Case

Selected

Move
Move All
Remove
Remove All

Help OK Cancel

3

Select Values

Available

Name: Starts
Search
 Match Case

100050
100070
100090

Selected

100050

Move
Move All
Remove
Remove All

Help OK Cancel

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.