



### Equipment Inventory Dashboard Page

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 interface. At the top, there is a navigation bar with several tabs: 'Finance Lookups', 'GL Funds Available', 'Grants Funds Available', 'Transaction Export', 'Segment Lookup', 'Object Lookup', 'Conversion Lookup', 'Legacy Transaction Export', 'Cost Center Lookup', 'PO Summary', 'Payments', and 'Equipment Inventory' (which is highlighted with a red box). Below the navigation bar is a 'Prompts' section containing various search filters and dropdown menus for 'Book Type', 'Organization', 'Organization Name', 'Planning Unit', 'Building Name', 'Room', 'Serial Number', 'Tag Number', 'Asset Number', 'PO Number', 'Cost', 'Employee Name', 'Category Description', 'Asset Description', and 'Date Placed in Service'. There are also 'Apply' and 'Reset' buttons at the bottom right of the prompts section.

Prompts	Definition
<b>Book Type</b>	The Book Type separates items that are Ohio University owned (green tag) or sponsored equipment (red tag).
<b>Organization</b>	Is the 6-digit number that represents an organization. Search and review all of the assets assigned to a specific organization.
<b>Organization Name</b>	If you do not know the 6-digit organization number, you can look up the inventory list by organization name.
<b>Planning Unit</b>	Review inventory listing by planning unit.
<b>Building Name</b>	Review inventory located in specific buildings.
<b>Room</b>	Review inventory by a specific room number.
<b>Serial Number</b>	Lookup an asset by serial number.
<b>Tag Number</b>	Lookup an asset by assigned tag number.
<b>Asset Number</b>	Lookup an asset by assigned asset number.
<b>PO Number</b>	Lookup assets by the PO used to purchase.
<b>&gt;=Cost</b>	Lookup assets greater than or equal to a specific cost.
<b>Employee Name</b>	Lookup assets assigned to specific Ohio University Employees.
<b>Category Description</b>	View assets by category description.
<b>Asset Description</b>	Lookup assets by description.
<b>Date Placed in Service</b>	Lookup assets based off the date they were added to Equipment Inventory.



### Equipment Inventory in Use

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

Finance Lookups Home Catalog Favorites v Da

GL Funds Available Grants Funds Available Transaction Export Segment Lookup Object Lookup Conversion Lookup Legacy Transaction Export Cost Center Lookup PO Summary Payments **Equipment Inventory** FARM Approvers

**Prompts**

Book Type  FMS CORP BOOKS  SPONSOR EQUIP  
 Organization: 100060 Organization Name: --Select Value-- Planning Unit: --Select Value-- Building Name: --Select Value-- Room: --Select Value--

Serial Number: is equal to / is in --Select Value-- Tag Number: contains any --Select Value-- Asset Number: PO Number: is equal to / is in --Select Value-- Cost: >=

Employee Name: is equal to / is in --Select Value-- Category Description: is equal to / is in --Select Value-- Asset Description: contains any --Select Value-- Date Placed in Service: Between @ @ Apply Reset v

**Equipment Inventory**

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
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

[Refresh](#) - [Print](#) - [Export](#)

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**.

After the assets populate it is recommended that you export to Excel, see image below. The information is easily filtered and sorted.

Finance Lookups Home Catalog Favorites v Da

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**Prompts**

Book Type  FMS CORP BOOKS  SPONSOR EQUIP  
 Organization: 100060 Organization Name: --Select Value-- Planning Unit: --Select Value-- Building Name: --Select Value-- Room: --Select Value--

Serial Number: is equal to / is in --Select Value-- Tag Number: contains any --Select Value-- Asset Number: PO Number: is equal to / is in --Select Value-- Cost: >=

Employee Name: is equal to / is in --Select Value-- Category Description: is equal to / is in --Select Value-- Asset Description: contains any --Select Value-- Date Placed in Service: Between @ @ Apply Reset v

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PDF

**Excel 2007+**

Powerpoint 2007+

Web Archive (.mht)

Data

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.

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 Value--  
 NULL  
 100050  
 100060  
 100070  
 100090  
 100100  
 100120  
 100130

Organization Name: --Select Value--

Planning Unit: --Select Value--

Building: --Select Value--

Serial Number: is equal to / is in Value--

Tag Number: contains any --Select Value--

Employee Name: is equal to / is in Value--

Category Description: is equal to / is in --Select Value--

Equipment Inventory

Asset Number	Asset Description	Major Category	Category Sub1
48116	Konica Minolta MS 600 MKII Digital Microform Scanner	MOVABLE EQUIPMENT	SCIENTIFIC AND RESEARCH

Select Values

Available

Name Starts

Search

Match Case

100050  
100060  
100070  
100090  
100100  
100120  
100130  
100140  
100150  
100160  
100170  
100184  
100190  
100192  
100200  
100210

Selected

Move  
Move All  
Remove  
Remove All

Help

OK Cancel

3

Select Values

Available

Name Starts

Search

Match Case

100050  
100070  
100090

Selected

100060

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 in Export to CSV

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.