AIMS – Asset Inventory Management System

Asset Inventory Management System (AIMS) is a new BASIS application that combines the following areas into one integrated system:

Property Inventory - Tracking and reporting (including depreciation) of all University owned capital equipment. Annual physical inventories of all University owned capital equipment.
Departments - Capability to create and maintain records for your non-capital assets, maintain your own information for capital assets, and include in the annual physical inventory and surplus processes.
Surplus - the state sanctioned means of disposing of items (capital and non-capital) that are no longer needed. AIMS provides for a process for identifying items to surplus, approval by management of items to be disposed, items picked up and moved to the Surplus Warehouse, and items auctioned to the public.

How to Find Assets

Several lists are available to find assets:

> ➢ **LABU (List Assets for BU, Status, Capital & Date)** lists capital or departmental assets for a specified status for an optional BU on or after acquisition date
> ➢ **LASR (List Assets for Status and Room)** lists assets for a specified status (Active or Disposed) for a room tag number for optional capital code and on or after acquisition date
> ➢ **LARE (List Assets for a Responsible Employee)** lists active assets for an employee id acquired on or after an optional date
> ➢ **LAR (List Assets for Room)** lists the assets for a room tag number.
> ➢ **LALH (List Asset Location History)** lists the location history for an asset.

How to Find Assets for a BU

LABU (List Assets for BU, Status, Capital & Date) lists capital or departmental assets for a specified status for an optional BU on or after acquisition date.

There are several asset statuses in AIMS: **AI** (Active Inventoried), **AU** (Active Untagged), **AN** (Active but Not inventoried), and **AQ** (Active Queued for surplus). The asset capital code is either **C** (Capital) or **N** (Non-capital or departmental asset). If you enter a date (date acquired), the list will start with assets acquired on or after the date specified.

Control number vs. Tag number

Control No is a unique system generated identifier for each asset. This number stays with the asset throughout its life. **Tag No** is the official number assigned by Property Accounting. Once an asset is tagged, this number is the primary identifier of an asset.

When entering a tag number in the Control No field, you must prefix the it with a T.

Viewing Asset Information

A (Asset) displays all the information about an asset.

The first screen displays all of the primary information about the asset. The asset's description is located to the right of the control number in the body of the screen. The physical location and responsible employee are displayed. The extended text can be accessed by pressing **PF9** (EText). The asset cost distribution can be accessed by pressing **PF10** (CDst).

The second screen displays audit information such as how and when the asset's last location was verified. Information relating to the disposition of an asset is displayed, if appropriate.

The third screen displays departmental information. If any information was entered related to either capital and non-capital assets, it is displayed.

The fourth screen displays all the audit log information. This screen is primarily used by Property Accounting.

How to Change an asset's BU, responsible employee, and/ or location

These processes eliminate the paper forms previously required by Property Accounting.

How to Transfer Assets from one BU to Another

ABRL (Asset BU, Responsible Emp and Location) allows a user to transfer an asset from one BU to another**.** Anyone is permitted to initiate this change since it has to be approved by the BU currently assigned the asset and the BU receiving the asset. The status of the asset must be **AI** (Active Inventoried capital asset or active departmental asset) or **AN** (Active but Not inventoried capital asset). The keys are Action **U** (to initiate the transaction) and **Tag No** of the asset.

- ➢ *BU*   enter the receiving budgetary unit who will be assigned responsibility for the asset.
- ➢ *Room Tag*   enter the new room tag number or other location where the asset will be located in the receiving BU. Press **PF1 (Help)** for a list of rooms for a specified building. Most rooms have a barcode with this Room Tag Number affixed to the doorway.
- ➢ *Off site location*   only use if the physical location of the asset is 'off site'. Use of the Off-Site Location is mutually exclusive with the Room Tag Number, which will be zero for an off site asset.
- ➢ *Responsible Employee*   enter the ID of the receiving BU's employee assigned responsibility of the asset. Press **PF1 (Help)** to find the employee's ID using a name search.

Press **PF10 (Save)** to submit the asset BU change for approval. BU transfers are approved at a department head/director level for both the receiving BU and the BU from where the asset was transferred.

How to Change the Physical Location of an Asset

ABRL (Asset BU, Responsible Emp and Location) allows a user to change the physical location of an asset**.** The status of the asset must be **AI** (Active Inventoried capital asset or active departmental asset) or **AN** (Active but Not inventoried capital asset). The keys are Action **U** (to initiate the transaction) and **Tag No** of the asset.

- ➢ *BU*   leave as is unless you are also transferring to another BU.
- ➢ *Room Tag*   enter the new room tag number or other location where the asset will be located in the receiving BU. Press **PF1 (Help)** for a list of rooms for a specified building. Most rooms have a barcode with this Room Tag Number affixed to the doorway.
- ➢ *Off site location*   only use if the physical location of the asset is 'off site'. Use of the Off-Site Location is mutually exclusive with the Room Tag Number, which will be zero for an off site asset.
- ➢ *Responsible Employee*   leave as is unless you are also changing the employee assigned responsibility of the asset. Press **PF1 (Help)** to find the employee's ID using a name search.

Press **PF10 (Save)** to submit the location change for approval. Location and responsible employee changes are approved by the departmental contact person (unless otherwise specified by the department). The transaction is automatically approved if the person initiating the change and approving it are the same.

How to Change the Responsible Employee for an Asset

ABRL (Asset BU, Responsible Emp and Location) allows a user to change the responsible employee of an asset**.** The keys are Action **U** (to initiate the transaction) and **Tag No** of the asset. *Note:* if you have several assets for which you need to change the responsible employee, please refer to How to Mass Change the Responsible Employee.

- ➢ *BU*   leave as is unless you are also transferring to another BU.
- ➢ *Room Tag*   leave as is unless you are also changing the physical location of the asset, then enter the new room tag number or other location where the asset will be located in the receiving BU. Press **PF1 (Help)** for a list of rooms for a specified building. Most rooms have a barcode with this Room Tag Number affixed to the doorway.
- ➢ *Off site location*   only use if the physical location of the asset is 'off site'. Use of the Off-Site Location is mutually exclusive with the Room Tag Number, which will be zero for an off site asset.
- ➢ *Responsible Employee*   enter the new employee ID who will be assigned responsibility of the asset. Press **PF1 (Help)** to find the employee's ID using a name search.

Press **PF10 (Save)** to submit the location change for approval. Location and responsible employee changes are approved by the departmental contact person (unless otherwise specified

by the department). The transaction is automatically approved if the person initiating the change and approving it are the same.

An email is sent to the new responsible employee to notify him/her of his/her new asset responsibility.

How to Mass Change the Responsible Employee

MCRE (Mass Change of Responsible Employee) allows a user to change the responsible employee for all assets for which that employee is responsible. This function is designed to ease the changes to the responsible employee due to turn over or job reassignments. This function only changes the responsible employee for a specified BU. If that employee is responsible for assets in several budgetary units, then a separate change will have to be processed for each BU. The keys are Action **U** (update), **BU**, and **Responsible Emp ID**.

Security by value restrictions will be applied such that the user must be authorized for the Asset BU.

> ➤ *New Responsible Emp ID*   enter the new employee ID – must be a currently appointed employee - who will be assigned responsibility of the assets. Press **PF1 (Help)** to find the employee's ID using a name search.

Press **PF10 (Save)** to the change of the responsible employee ID. *Note:* only the contact person for a BU will be allowed to process this change.

An email is sent to the new responsible employee to notify him/her of his/her new asset responsibility.

Departmental Assets and Information

AIMS provides departmental users with the capability to create and maintain records for their non-capital assets and to maintain their own information for capital assets. Non-capital assets are equipment where the unit cost is less than the capitalization threshold of $2,500.00. For departments that want to track non-capital assets, the **DAI (Departmental Asset/Information***)* allows for creating assets in the university asset database. The new departmental asset is routed to the budgetary unit's manager for approval. Once the transaction has been approved, the asset can be viewed in AIMS using a variety of online lists.

Departmental assets can be included in the annual physical inventory and surplus processes required for capital assets.

DAI also allows users to add and maintain additional departmental information for capital assets.

How to Create a Non-Capital Asset

DAI (Departmental Asset/Information) provides the facility for creating, updating, and viewing non-capital departmental assets. This function is also used for entering, updating, and viewing the additional departmental information fields for either capital or departmental assets. The keys are Action (**A**dd) and **Tag No** (the official tag number for an asset whether capitalized or not assigned by Property Accounting. For non-capital assets, it's the blue tag.). *Note:* you can request blue tags from Property Accounting.

Security by value restrictions will be applied such that the operator must be authorized for the Asset BU. Once completed, the transaction will route to the BU contact person (unless otherwise specified by the department) for approval.

***Screen 1

- *Description* — enter a short description of the asset. This description will be used on AIMS screens and in reports to aid in identifying the asset.
- *Tag Loc* — an optional notation used to identify where on an asset the 'tag' has been physically placed.
- *Acquired* — enter the date the asset was acquired or leave blank.
- *Vendor* — enter the name of the vendor from whom the asset was acquired.
- *Acquisition Method* — enter the method by which the asset was obtained. Press **PF1 (Help)** for a list of acquisition methods.
- *Cost* — enter the total cost of the asset including any proportional share of sales/use tax, freight or miscellaneous expense, or discount received.
- *Make* — enter the brand or manufacturer of the asset or leave blank.
- *Model* — enter the manufacturer's assigned style, type, or version of the asset or leave blank.
- *Serial #* — enter the manufacturer's assigned serial number or leave blank.
- *Item* — enter a classification that broadly identifies the asset. Press **PF1 (Help)** for a list of asset items. This field will default to Departmental Asset, if you don't want to further classify your asset.
- *BU* — enter the budgetary unit assigned responsibility for the asset.
- *Room Tag* — enter the room tag number that is assigned to the room or other location where the asset is located. Press **PF1 (Help)** for a list of rooms for a specified building. Most rooms have a barcode with this Room Tag Number affixed to the doorway. *Note:* please contact Property Accounting if the room does not have a barcode.
- *Off site location* — only use if the physical location of the asset is 'off site'. Use of the Off-Site Location is mutually exclusive with the Room Tag Number, which will be zero for an off site asset.
- *Responsible Employee* — enter the ID of the employee assigned responsibility of the asset. Press **PF1 (Help)** to find the employee's ID using a name search. This individual may have a direct relationship with the asset (such as personal use of a laptop, PDA, or other piece of equipment) or indirectly assigned responsibility (such as a department head or manager of a department where the asset is used).

Press **PF8 (NextS)** to complete your data entry on screen 2.

***Screen 2

➢ *Warranty Expiration* enter the date that the warranty for the asset expires or leave blank.
➢ *Possessing BU* enter the budgetary unit that actually possesses the asset versus the BU assigned management responsibility for the asset or leave blank if they are the same.
➢ *Asset Class* enter a classification of the asset or leave blank. A department can create their own list of asset classifications that may be used for assets within their BU.
➢ *Image URL* enter your departmentally maintained uniform resource locator for an image of the asset or leave blank.
➢ *Information Codes and Values* enter up to 32 pairs of departmental information codes and values. Press **PF8 (Info+)** for additional information codes and values. Press **PF7 (Info-)** to return to previous codes and values.
- The departmental **code** identifies a specific data item stored in an associated value field, i.e.: OS (operating system), MEM (memory), or DLS (date last serviced). Press **PF1 (Help)** for possible codes. *Note:* these codes are maintained by Property Accounting and shared by all departments. Requests for new codes are directed to Property Accounting.
- The specific data **value** for an associated departmental information code. This is the actual information being retained while the code identifies the type of information. Dates are stored as YYYYMMDD, a numeric is stored with leading zeroes up to its maximum field size, and character data is stored in all upper case.

Additional information may be added by pressing **PF9 (DDesc)**.

Press **PF10 (Save)** to submit the new departmental asset for approval.

How to Copy a Non-Capital Asset

Display the non-capital asset you want to copy on **DAI (Departmental Asset/Information).** Change the action to **C** (copy) and enter the new asset's tag number in the *Tag No* field and press enter. The departmental asset information is copied and displayed so you can change the information as appropriate. *Note:* the asset cost and serial number fields are blank.

Security by value restrictions will be applied such that the user must be authorized for the Asset BU.

➢ *Cost* enter the total cost of the asset including any proportional share of sales/use tax, freight or miscellaneous expense, or discount received. Leave blank if you can't identify a cost for the asset.
➢ *Serial#* enter the manufacturer's assigned serial number or leave blank.

Press **PF8 (NextS)** to make any necessary changes on screen 2.

Additional information may be added by pressing **PF9 (DDesc)**.

Press **PF10 (Save)** to submit the departmental asset for approval.

How use Departmental Asset Classifications

 DAC (Departmental Asset Classification) allows users to define asset classifications to use for their own purposes of aggregating, sorting, or selecting their assets. Once the departmental asset classifications have been defined for your BU, go to DAI to add the asset classifications to your assets.

> ➢ departmental asset classifications are user defined for their BU
> ➢ LDCC (List Departmental Asset Classes) lists assets classes for a BU
> ➢ LDCD (List Departmental Asset Classes by Desc.) lists assets classes for a BU by the asset class description
> ➢ **LBUD (List assets for BU, Status & Dept class)** lists assets in a specified status for a BU and asset class on or after acquired date

How use Departmental Information Codes and Values

Departmental information codes and values are valuable tools to record information about your capital and departmental assets.

> ➢ Only Property Accounting can add new codes
> ➢ departmental **code** identifies a specific data item stored in an associated value field, i.e.: OS (operating system), MEM (memory), or DLS (date last serviced)
> ➢ data **value** for an associated departmental information code - this is the actual information being retained while the code identifies the type of information. Dates are stored as YYYYMMDD, a numeric is stored with leading zeroes up to its maximum field size, and character data is stored in all upper case.
> ➢ displays the value-data type, the maximum length of the value-data type, minimum and maximum values for the value-data types, and discrete values, if any.
> ➢ LDIC (List Dept Information Codes by code) lists departmental information codes
> ➢ **LBUI (List assets for BU, Status & Info code)** lists assets in a specified status for a BU and departmental information code starting with an optional departmental information value

How to Dispose of a Departmental Asset

DOA (Disposal of Asset) allows users to dispose of departmental assets.

> ➢ dispose departmental assets that were replaced by warranty or traded in
> ➢ surplused departmental assets should be handled via the surplus process
> ➢ Security by value restrictions – user must be authorized for the Asset BU
> ➢ **LDAD (List Disposed of Assets for Disp. Code)** lists assets for a specified disposition code and capital code on or after disposed of date
> ➢ **LDBU (List Disposed of assets for BU)** lists disposed of assets for a BU