1. Introduction
2. New Responsibilities
3. Transactional Processes
4. Use of PeopleSoft User Role
Definition of Responsibilities

1. Department Manager-Responsible official appointed by the Dean or Department Head for each Area ID
2. Custodial Contact-Primary Area ID contact for property administration
3. Custodian-Individual assigned responsibility for University property
4. Property Administration-Responsible for assets from purchase order to disposal
Department Manager Responsibilities:

- Responsible for the proper custody, maintenance and safekeeping of UTD property assigned to his/her department.
- The department manager or his/her appointee can act as departmental property manager; however, responsibility for property rests with the department manager.
- Responsible for ensuring that all department assets are validated annually.
- Responsible for ensuring that all items, missing from department inventory are thoroughly researched, act as signature authority for all missing reports.
Custodial Contact Responsibilities:

• Responsible for controlling, maintaining and monitoring all Controlled and Capital assets that are assigned to their Area ID.

• Maintain the Custodian information for laptops and tablets.

• Perform annual inventory, audits, transfer assets between departments and submit Missing/Stolen Reports when necessary.

• Responsible for maintaining all documentation required to support departmental assets during their lifecycle.
Custodian Responsibilities:

- Responsible for the proper custody, maintenance and safekeeping of UTD property assigned for their use.
- It is the responsibility of each user to report when an asset is lost, missing, broken, relocated or needs repairs.
Property Administration Responsibilities

LOGISTICS

• Preview all purchase orders for accuracy and make necessary corrections.
• Maintain asset records and update records when necessary.
• Conduct and coordinate annual Scan & Validate inventories.
• Track Missing and Stolen assets.
• Transfer assets between departments.
• Respond to emails in a timely manner.
• Prepare inventory progress reports for Provost and VP’S.

Distribution

• Receive all freight into receiving warehouse, tag and deliver them to departments.
• Maintain asset records and update records when necessary
• Pick up technology recovery devices from departments upon request and move them to Surplus.
• Respond to emails in a timely manner.
• Responsible for the custody and safekeeping of all items in Surplus until they are sold.
Procedures and Processes

• Identify all P-Card asset within 48 hours
  Email to Inventory@utdallas.edu to inform of this purchase.
  Attach a copy of the receipt and the cost center that this unit will be charged to.

• Provide the Custodian name and UTD employee ID upon receipt of laptop/tablet by encrypted
  Email to Inventory@utdallas.edu, Employee ID’s must be sent by encrypted email for security reasons.
Inventory Control Procedures

• Mobile Technology Device (MTD) Validation
• Stationary Asset Validation
• Off-site Asset Validation
• Scanning Options
• Inventory Validation Email
## Asset Classification

<table>
<thead>
<tr>
<th>Asset Classification</th>
<th>Definition</th>
<th>Method of Validation</th>
<th>Type of Validation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stationary Assets</td>
<td>Any asset remaining in stationary location for daily use</td>
<td>Scan and Validate</td>
<td>Location</td>
</tr>
<tr>
<td>Mobile Technology Devices</td>
<td>Any asset subject to frequent movement on or off Campus</td>
<td>Department provided spreadsheet</td>
<td>Custodian Name and UTD ID</td>
</tr>
<tr>
<td>Permanently off Campus Assets</td>
<td>Any asset permanently located at a site not owned or leased by the University</td>
<td>E-mail</td>
<td>Physical location, Name and UTD ID of employee</td>
</tr>
<tr>
<td>Unresolved</td>
<td>Any asset not validated by one of the three validation methods</td>
<td>Missing Report</td>
<td></td>
</tr>
</tbody>
</table>
MTD Validation

- A mobile asset validation Report will be sent your custodial contact.
- The return report must be routed to Dean than submit as e-mail attachment.
Scanning Options

- The department has the option of having our inventory team perform the scanning or doing the scanning themselves.
- We recommend that the inventory team perform the inventory due to being more proficient with the scanner and knowing all of the procedures.
- If Scan and Validate team is used, departmental responsibility includes facilitating entry into all areas.

Inventory Validation Email

- An email will be sent to certify that your inventory is completed when all requirement for the annual inventory have been met.
- Please keep this email for your records.

Unsolved Assets

- Unsolved assets are assets not validated by one of the three validation methods.
## FY14 Cyclical Inventory Schedule

<table>
<thead>
<tr>
<th>Inventory Period</th>
<th>Functional Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>September - February</td>
<td>Provost</td>
</tr>
<tr>
<td>March</td>
<td>VP Student Affairs</td>
</tr>
<tr>
<td>April</td>
<td>The President&lt;br&gt;Security Administration&lt;br&gt;VP Public Affairs&lt;br&gt;VP Research&lt;br&gt;VP Development and Alumni Relations&lt;br&gt;VP Communications&lt;br&gt;VP and CIO Information Resources&lt;br&gt;VP Diversity and Community Engagement</td>
</tr>
<tr>
<td>May/June</td>
<td>VP Administration&lt;br&gt;VP Budget and Finance</td>
</tr>
</tbody>
</table>
**Requesting Updates**

- We will process any request for updates as quickly as possible.
- An email can be sent to Inventory@utdallas.edu, Greg White at gvwhite@utdallas.edu, Don Stephens Dons@utdallas.edu and Rick Nelson at rbn061000@utdallas.edu for any request for updates, reports etc.

**Report Missing/Stolen Asset**

- Missing/Stolen report is the only paper form still in use due to state requirements.
- A police report must be filed and submitted with the assigned Missing/Stolen report if an asset is suspected of being stolen.
- A missing report will only need to be submitted the first year that the asset is reported missing.
- Each missing item must have its own missing report.