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Property Inventory Process (Click to return to TOC)

TTU OP 63.08, Property Management, defines the scope of property management at Texas Tech University, and provides the policy and procedures to manage, control and account for all institutional property at TTU.

Texas Tech Policy requires departments complete a physical inventory annually. Department personnel will complete this inventory review, or Annual Certification, using the most recent listing from the Property Inventory System. The inventory certification may occur anytime throughout the year. Starting in April, email reminders route to property custodians and delegates of the annual certification deadline of June 30.

How to access the Property Inventory System (Click to return to TOC)
The Property Inventory System is accessible by logging into the Raiderlink portal or through the Property Management website quick links. See the steps for both below:

A & F Work Tools:
Select the A & F Work Tools tab. In the Finance portlet under Property Management, click on Property Inventory System.

Quick Link Property Management website:
Navigation Menu Bar
The primary method of navigating within the system is using the navigation menu bar along the top of the page. The navigation menu bar is on every page of the application, allowing movement from one page to another quickly.

Property Inventory Page (Click to return to TOC)
The application opens to the Property Inventory page. The user can select View, Edit, Transfer Inventory or Annual Certification with the corresponding radio button.

If authorization is given to view inventory for more than one department/organization, change departments by selecting a different department and organization from the drop-down menus. The department/organization selected will display on the page.
Department Inventory Reports
The following department inventory reports are available in the drop-down menu for Department Inventory:

- All Property (including Missing info and Missing)
- Items Missing Information
- Missing Property
- Lost and Stolen Property

Departments should use these reports to review and update information while performing annual inventory reviews. The column headers can be used to sort the inventory listing. The reports can be exported to either PDF or Excel by selecting the corresponding icon.

All Property (including Missing Info and Missing) (click to return to TOC)
This report lists all property associated with a department and includes a Missing Column to identify assets recorded as missing or missing required information. Assets with missing data are denoted with a MI and missing assets are denoted with a M. Verification includes confirming the Condition, Serial Number, and Room location of the asset. The department may adjust these fields when needed. This report should be reviewed and updated on an ongoing basis.
To edit an asset, click the red **Tag Number**. Notes regarding the asset may be added by clicking the yellow page icon on the left of the tag number.

To edit the **Condition** of the asset, click the drop-down arrow on the Condition field and select from **New**, **Good**, **Fair** or **Poor**.

- **New**—Condition assigned to newly issued inventory tags by Property Management (excellent condition).
- **Good**—Somewhat used or reconditioned property that, while still in useable condition, is slightly shopworn, soiled or otherwise precluded from being considered “new” (the condition of the property does not impair the utility of the property).
- **Fair**—Property that is soiled, shop worn, rusted, deteriorated, or damaged to the extent that utility is slightly impaired; or reconditioned property that has been repaired or renovated but has since deteriorated and which needs or may need additional repair or renovation soon.
- **Poor**—Property so badly broken, soiled, rusted, mildewed, deteriorated, or damaged that its utility is seriously impaired; or property that has been repaired or renovated but has since seriously deteriorated due to factors such as major wear and tear, corrosion, or exposure to weather.

To edit the **Serial Number**, enter the serial number in the text box. The serial number must match what the manufacturer assigned to the asset. For fabricated assets that will not have a serial number, enter “fabrication”. Do not enter any other information in this field as it may render the asset unsearchable.

To edit the **room location**, first select the correct **Building** from the drop-down menu. The room drop down list will populate to allow the selection of the appropriate room to assign to the asset. After all changes are complete, click **Save**. Selecting **Save** completes the process and updates the information in the Property Inventory System. To cancel the changes of an item, click **Cancel**.
The **Items Missing Information Report** will display a list of inventory items from the selected organization that require a serial number and/or room location. Maintaining this report on an ongoing basis is very important. This report should be clear prior to submitting the department Annual Certification. **Outstanding items on this report will result in the rejection of the Annual Certification.**
**Missing, Damaged or Stolen Property** (Click to return to TOC)
Report inventory items listed on the All Property (including Missing Info and Missing) report that cannot be physically located to Property Management immediately. Due diligence must be made to locate the items before reporting them as missing.

- Before submitting the Annual Certification, all items that are missing during the review must appear on the Missing Property Report.
- For items already reported and coded with (M) that show on the missing report from previous inventory cycles and are still missing, no further action is required.
- For items reported in previous inventory cycles that were located during the current review, notify Property Management at Property.Management@ttu.edu to have the items removed from the missing report.
- For items identified as missing in the current review that are not already on the report, submit the Request to Report Missing or Damaged Property Report form to Property Management. To access the form, select Forms in the link in the top menu bar. Click TTU then the link for the form.
- Items determined stolen require the submission of the Request to Delete Stolen Property Report form. A copy of the official police report is also required.
- Please allow 3 to 5 business days for Property Management to process the form. The missing, stolen, damaged or destroyed items must appear on the report before proceeding with the Certification process.

**Annual Certification** (Click to return to TOC)
Prior to submitting the department Annual Certification, review all reports and make sure to complete any necessary edits and transfers. Please keep in mind to verify all changes submitted to Property Management reflect in the inventory reports before submitting the certification. Be advised these changes could take several days. The Property Inventory Checklist provides preparation steps to check off prior to submitting.

*The Annual Certification is a two-step process. It must first be submitted and then approved.*

**Submitting the Annual Certification**
The Property Custodian or Delegate can submit the Annual Certification. However, the Property Custodian must process the final approval. Property Management will reject the certification if unauthorized staff approve it.
On the Property Inventory Page, click on **Annual Certification**.

To submit the current year inventory, click on **Submit**.

Click on each of the report links to verify data is correct. If the reports are not correct, click **Cancel** and complete necessary steps to correct the data. If all data is accurate, click the check box I **have read and agree to the statement above**. Click on **Submit**.

**Delegates may submit the Annual Certification, but the Property Custodian must process the final approval.**
An automated email routes to the current Property Custodian and Delegate as notification that there is a pending approval with a link to access the Property Inventory System. Only the Property Custodian should process this approval.

**Approving the Annual Certification**
The Property Custodian must approve the Annual Certification. A pending Annual Certification notice will appear in the top right-hand corner of the Property Inventory page for the Property Custodian and the Delegate when a pending annual certification needs approval. The Delegate should follow up with the Property Custodian to make sure the approval is processed.

The Property Custodian should perform the following steps: Make sure each of the listed reports are accurate. If the reports are not correct, click **Deny**.

Selecting **Deny** will return the user to the Property Inventory page. Make corrections as needed then resubmit the certification. Follow the steps under **Submitting the Annual Certification**.

Then click on **Yes**.
If the reports are correct, click on **Approve**. Again, the authorized Custodian must approve the Annual Certification. Property Management will reject certifications if the approval is by an unauthorized individual.

Click on the checkbox next to **I have read and agree to the statement above**.

Click **Approve**.
When the Annual Certification submission is complete and approved, the submitter is returned to the Property Inventory Page. The certification will show as below once complete.

**Search Fixed Assets** *(Click to return to TOC)*

The Property Inventory System allows the user to search assets by Tag Number, Category, Serial Number, Institution, Department and Organization. An Institution must be selected for every search.

To search for assets, click on **Search Fixed Assets** on the top menu bar.

Deleted assets show highlighted in the search results.
Search by Tag Number (Click to return to TOC)

To search by Tag Number, enter the Tag Number, select the Institution from the drop down list and click Search. The search results will display with the Tag Number, Serial Number, Manufacturer, Model, Description, Room (Building and Room), Acquisition Date, COAS, Department, Organization, Property Custodian and Category.

Search by Category (Click to return to TOC)

To search by Category, select the Category and the Institution from the drop-down menus and click Search. The search results will display with the Tag Number, Serial Number, Manufacturer, Model, Description, Room (Building and Room), Acquisition Date, COAS, Department, Organization, Property Custodian and Category.
**Search by Serial Number** (Click to return to TOC)

To search by Serial Number, enter the **Serial Number**, select the **Institution** from the drop-down menu and click **Search**. The search results will display the Tag Number, Serial Number, Manufacturer, Model, Description, Room (Building and Room), Acquisition Date, COAS, Department, Organization, Property Custodian and Category. The serial number search is not case sensitive.

**Search by Department and Organization** (Click to return to TOC)

The Organization drop down menu is dependent on the Department chosen first. To search by Department and Organization, select the **Institution** from the drop-down menu. Select the **Department** and then the **Organization** from the drop-down menus and click **Search**. The search results will display with the Tag Number, Serial Number, Manufacturer, Model, Description, Room (Building and Room), Acquisition Date, COAS, Department, Organization, Property Custodian and Category.

If items do not show on the department’s All Property list, search by either tag or serial number to verify if the asset is located on another department’s inventory. It is possible that the transfer physically occurred, but the online transfer was not completed. Please notify Property Management at Property.Management@ttu.edu if this is the case.
Transfers (Click to return to TOC)

Transfers between different Chart of Accounts (T, S, H and E) do not process in the Property Inventory System. Property Management will process an Inter-Agency transfer manually. Please submit the Request to Transfer Equipment To Another Agency/Institution form (OP 63.08 Attachment F) to Property.management@ttu.edu.

Active Transfers, Initiate Transfer, or Search Transfer

To review pending active transfers, see below:
**Initiate Transfer** (Click to return to TOC)

To initiate a transfer, click the **Transfer Box** located on the line item of the asset. Click the **Transfer** button.

**Note:** The **All Property (including Missing Info and Missing)** report and the **Items Missing Information report** allow transfer transactions. In addition, the asset's originating Building and Room location are required to initiate a transfer.

To transfer an asset to another department within TTU, go into Property Inventory select the department, and organization that the asset(s) are to be transferred out of or from.
The transfer form populates and contains the Tag Number, Description, current Orgn and current Room location of the asset. Displayed on the right side are drop down menus to select the **receiving** Department, Orgn, Building and Room for the transfer. The **receiving** Building and Room locations are not required for the initiator; the receiving department will complete these. Click **Save** to initiate the transfer.

A confirmation page will pop up. A transfer ID number populates and an automated email routes to the receiving department’s Property Custodian and Delegate.

The system will also route a pop-up notice to the receiving department’s Property Inventory Page as shown below.
**Approving Transfers** (Click to return to TOC)

To approve (receive) a transfer, click on the **check box** for the asset and click the **Approve** button.

The transfer screen will pop up and the receiving department must assign the new **Building** and **Room** from the drop-down menus to approve before approving the asset transfer. If the data is missing an error message will be received, and the transfer will not process.
Once the approval is processed, a confirmation screen will populate indicating the transfer is complete and an automated email routes to the initiator notifying them of the transfer completion.

To reject an initiated transfer, click **Cancel Transfer**. Property Management recommends entering a rejection reason, but it is not required. Once rejected, an automated email notifies the initiator the transfer was not completed.
Transfer to Surplus (Click to return to TOC)

Surplus is under the management of the Ops Division of Planning and Admin C2006. Please reference TTU OP 63.07 Disposal of Surplus, Obsolete, or Uneconomically Repairable Inventory, and visit the Surplus website for further instruction. **Before a transfer can be completed the asset must have the original location assigned.**

The following are steps to initiate a transfer to the Operations Property Surplus Inventory Organization code C20061 for TTU and TTUS. Surplus will schedule a pickup and then will approve the transfer once the asset is in their possession. Transfers are required to be processed in the Property Inventory System.

![Image of Transfer to Surplus process]

**Step 1** choose the asset or multiple assets to be transferred, click TRF/REM radio button.

**Step 2** click transfer button.
Once the Transfer data is populated and the transfer reason is updated, click save.

The room number is not required to be assigned by the transferring department. Surplus will update the room location at the time the transfer is approved in the system.
**Search Transfer** (Click to return to TOC)

The Search Transfer page allows users to enter parameters and click on Search to view a list of transfers. The Institution and at least one search parameter is required. The search feature uses “AND” when more than one criterion is specified, so the results will match all criteria specified and not just one of the other. The user enters all or part of the name to search. The percent symbol (%) may be used to help with a search. Enter desired search criteria and click **Search**.

Search Transfer is located under the Transfer link in the Property Inventory page ribbon, shown below.

![Search Transfer Image]

Use the drop-down lists to choose the Institution and the transfer from organization. Click the red **ID** number to view the transfer.

![Search Transfer Details Image]
The transfer details will populate on the screen.

Questions and Help (Click to return to TOC)
For additional resources, click HELP in the top menu bar and then click TTU. Select any of the PDF documents to assist with Property Inventory.

For questions, contact Property Management at Property.Management@ttu.edu.
Property Inventory Certification Checklist

Use this check list as a guide to complete all steps in the annual certification process. The Property Inventory System Guide and Property Inventory Videos 3 and 4 provide instructions on how to process these updates in the Property Inventory System. Updates may take several days to process. Please plan accordingly to meet the June 30th deadline.

☐ **Department Inventory (All Property) Report**: Verify/Update the assets
  - Condition: Update in the Property Inventory System (Video 3)
  - Description, Manufacturer, and Model: Notify Property Management at Property.management@ttu.edu
  - Serial Number: Update in the Property Inventory System (Video 3)
  - Building and Room Location: Update in the Property Inventory System (Video 3)

☐ **Items Missing Information Report**: Verify report is blank
  - Missing Serial Number: Update in the Property Inventory System (Video 3)
  - Missing Building and Room Location: Update in the Property Inventory System (Video 3)

*Note: If the Serial Number or Location is missing, the Approved certification will be returned.*

☐ **Missing Report**: Identified on the Department Inventory report with an M in the Missing column
  - Verify all assets not located are included on the report.
  - To add missing assets, complete the Request to Report Missing or Damaged Property Report

☐ **Lost and Stolen equipment**
  - Complete the Request to Delete Stolen Property Report
  - Include copy of the police report for any stolen asset

☐ **Transfers**: Verify all pending transfer are processed via the Property Inventory System
  - Accept pending Transfers-In. (Video 4)
  - Verify pending Transfers-Out are approved by receiving department (Video 4)
  - Process any additional transfers needed

☐ **Trade In**: Verify items used as Trade-Ins are no longer on the department’s inventory

☐ **Remote or Loaned Assets**: Verify a Temporary Use Authorization Form is completed for each asset loaned or being used off campus. Forms must be updated annually.

☐ Discovered assets missing from Department Inventory Report: Complete the Discovered or Donated Equipment Form

☐ Verify all updates processed above are showing in the Property Inventory System

☐ Submit Property Inventory Certification: This can be submitted by the Property Custodian or the Delegate (Video 1)

☐ Custodian Approves/Certifies Property Inventory by June 30th each year (Video 1)

*Note: If anyone other than the Custodian Approves the Certification, it will be returned.*