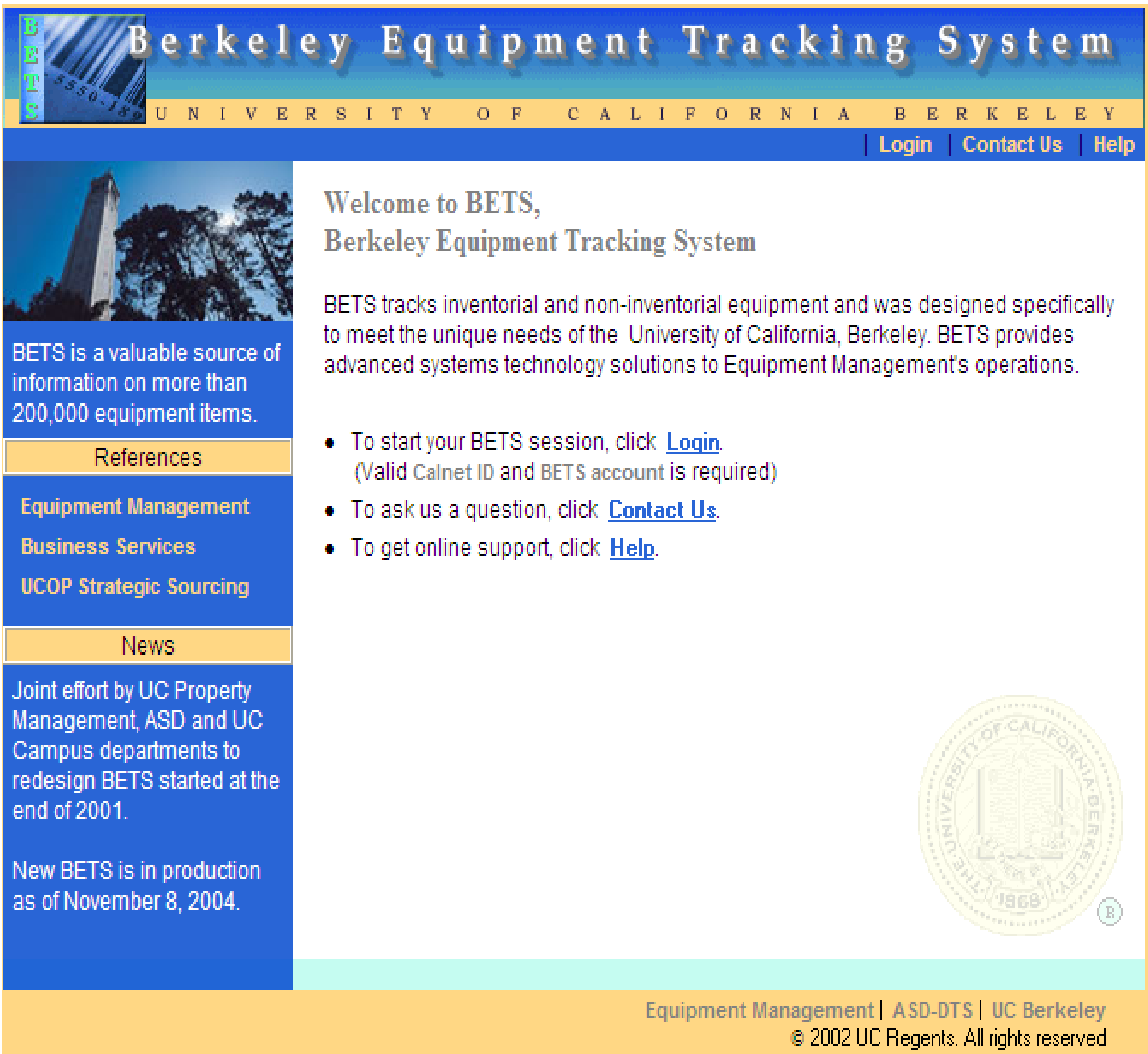
Berkeley Equipment Tracking System

UNIVERSITY OF CALIFORNIA BERKELEY

Contents

The Berkeley Equipment Tracking System-BETS



The Initial screen welcomes the user to BETS and displays system news. It also provides links to the following websites that contain policy and procedures relating to the care and maintenance of the university's capitalized assets:

- Equipment Management
- Business Services
- UCOP Strategic Sourcing

From this point the user will be able to:

- Log into a session by clicking Login
- Contact system support by clicking Contact Us
- Access online Help by clicking Help

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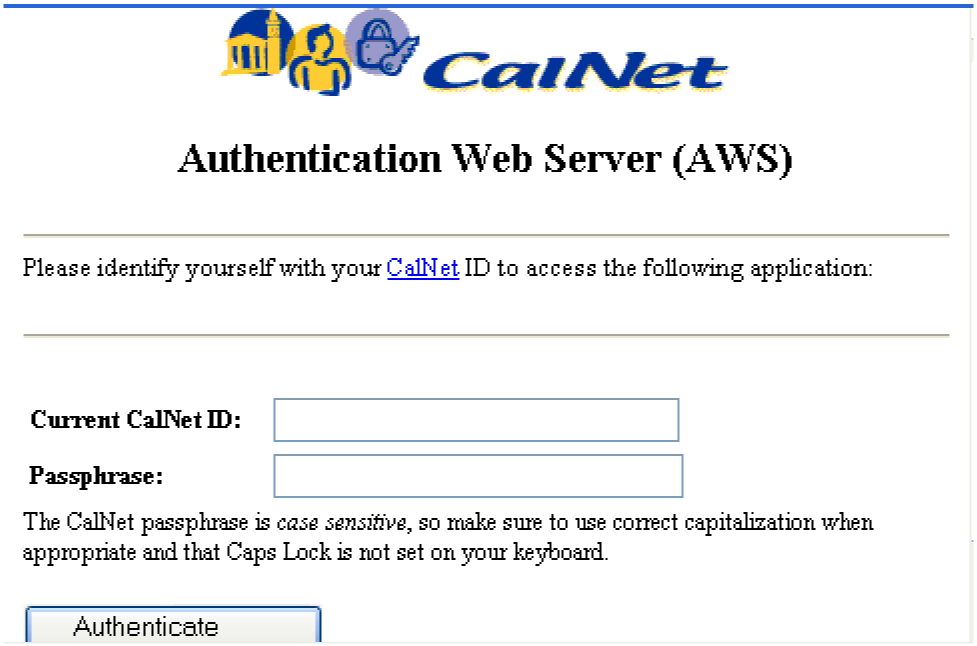
BETS Login



CalNet gateway allows user to log into BETS using CalNet ID and Passphrase.

Contact your departmental CalNet Deputy to establish CalNet ID and Passphrase if you don’t have one.

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Welcome Screen

From the Welcome User Screen you may:

- **Contact Us:** to ask a question or report a technical problem. Contact us at betshelp@berkeley.edu
- **Help:** to look up a specific topic in online help feature
- **Logout:** to close BETS session

This screen provides the user with:

- **System Information:** announcements from Equipment Management regarding training, system enhancements, etc.
- **Attention Items:** notifies the Equipment Custodian that Equipment Inventory Modification Requests (EIMR) are in the following status: Approval Pending, Process Pending or Rejected. Notifies Contact person when EIMR's are Approval Pending or Denied by Equipment Custodian. To access EIMR Status screen click **GO.**

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Equipment Inventory Modification Request (EIMR) Status

This session provides instructions on how to view the status of an EIMR using Selection Criteria for a specified date range.

The screen consists of two parts; EIMR Search and EIMR Search Result.

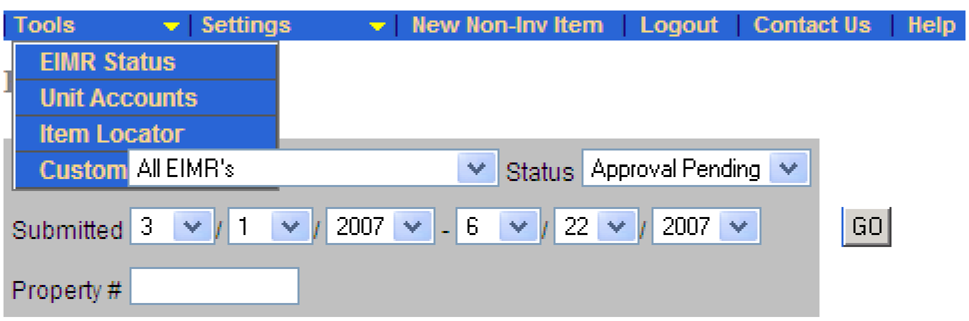
The system sets the Category default at All EIMR’s and the EIMR Standing at Approval Pending.

The default may be changed based on selections from pull down menu.

By the end of this session, you will be able to:

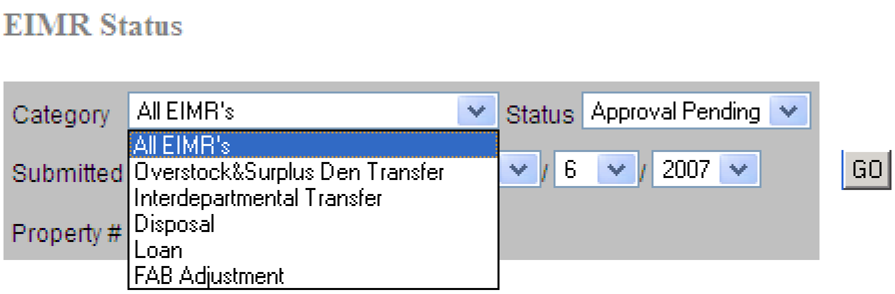
- Review EIMR’s submitted by Category within a specified date range
- Review the Standing of EIMR’s within a specified date range
- Select individual or all EIMR’s for action
- Approve or Delete EIMR – this option is available to the Equipment Custodian only
- Deny EIMR - this option is available to the Equipment Custodian only

To view the status of an EIMR – From the main menu under Tools, select EIMR Status.

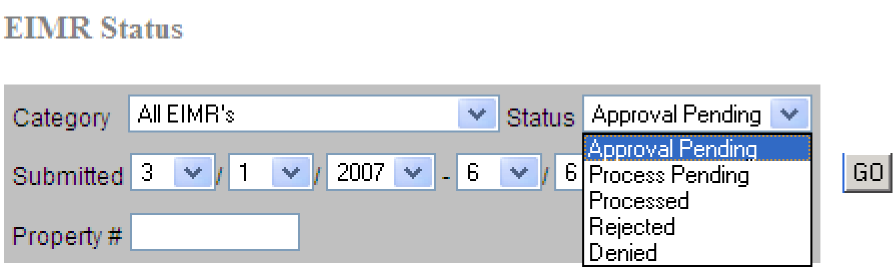


EIMR Search for Approval Pending

EIMR Search provides flexible search tools based on the following selections:



- EIMR Category:
  All EIMR's
  Overstock & Surplus Den Transfer
  Disposal
  Loan
  FAB Adjustment



- EIMR Status:
  Approval Pending
  Process Pending
  Processed
  Rejected
  Denied

- Date range EIMR's were submitted
- Property number of specific item

EIMR Search Results

EIMR Search Result displays records found and the following fields for each EIMR:

- Property Number – click on the property number to display Asset details screen
- Custody Code
- EIMR Category
- Date Submitted
- Submitted by user name
- EIMR Number-system generated, will display only on EIMR's processed by Equipment Management
- Processed-will display date only on EIMR's processed by Equipment Management

Depending on EIMR Status and User Access Type, the following actions are available on selected EIMR's:

- Approve EIMR - Executed by Equipment Custodian to approve EIMR's submitted by a Department Contact before it is processed by Equipment Management
- Delete EIMR - Executed by Equipment Custodian or Department Contact to deleted EIMR before it is approved or processed
- Deny EIMR – Executed by Equipment Custodian to deny EIMR submitted by Contact – a note (comment) is **required** to be completed for this action – the deny EIMR button is not displayed when a Contact person is viewing this screen

Access Type is based on security level assigned to user

EIMR Status is the current status of submitted EIMR:

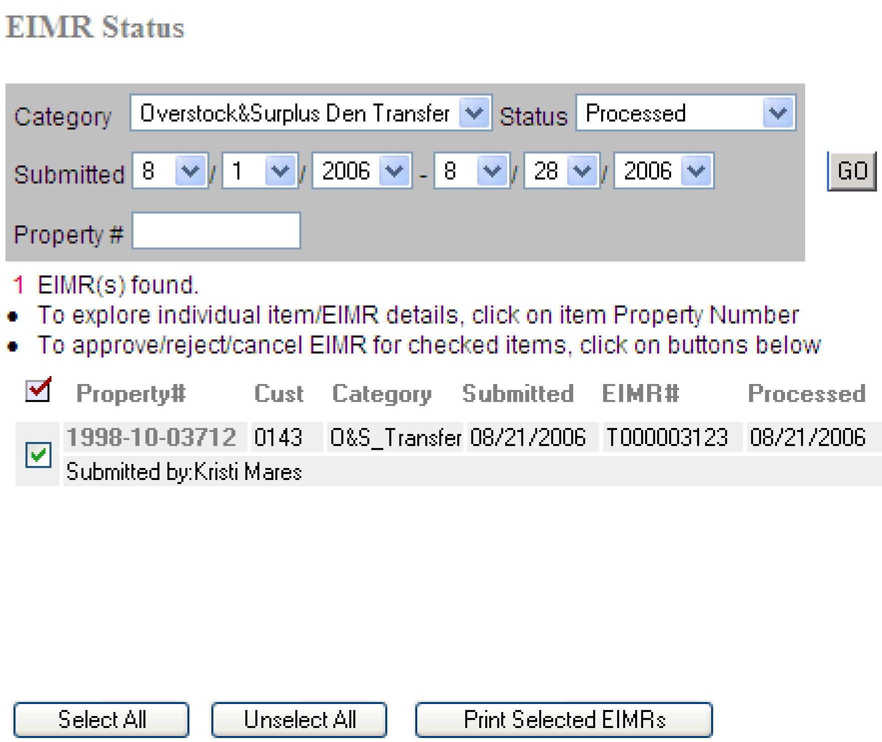
- Approval Pending – EIMR submitted by Contact requires Equipment Custodian approval
- Process Pending – EIMR submitted or approved by Equipment Custodian requires- processing by Equipment Management
- Processed – EIMR processed by Equipment Management
- Denied – EIMR submitted by Contact and denied by Equipment Custodian
- Rejected – EIMR submitted or approved by Equipment Custodian and rejected by Equipment Management

Printing the Equipment Inventory Modification Request-EIMR

This section provides the user with instructions on how to print an EIMR using EIMR Status screen (refer to EIMR Status section)

The EIMR number is system generated once Equipment Management processes the EIMR.

Note: This copy is for your records only. Do not send this copy to Equipment Management or Cal Overstock & Surplus Den.



To print the EIMR:

- Select **Processed** from the EIMR Standing menu
- Specify the date range EIMR's were submitted.
- Check box next to property number
- Click on **Print Selected EIMR's**

The Print EIMR option provides a paper copy of selected EIMR's

Berkeley Equipment Tracking System — June 6, 2007

Equipment Inventory Modification Request(EIMR)

EIMR No D000044563

EIMR Type	Disposal			**Date**	10/03/2006
Submitter	Mary Laverty	**Phone**	2-2068	**EMail**	mlaverty@berkeley.edu

Property No	2006-10-00612	**Ref(PO) No**	0000000001
Custody Code	9906	**Department**	Ucop-Yearend Capitalization
Building No	9001	**Building**	Offcampus
Room No	NONE	**Value**	$1,298,571.59
Serial No	NONE	**PI/User**	
Description	Low value equip/ucop required		

Disposal Code 29 **Description** Miscellaneous

Comment/Note

reverse the $1,298,571.59 for location 1 and $6,036.08 for location j for property numbers 20061000612 and 20061000613 recorded in bets per op's confirmation

The EIMR may be viewed on screen or you have the option to print a hard copy for your records.

This section provides instructions on how to:

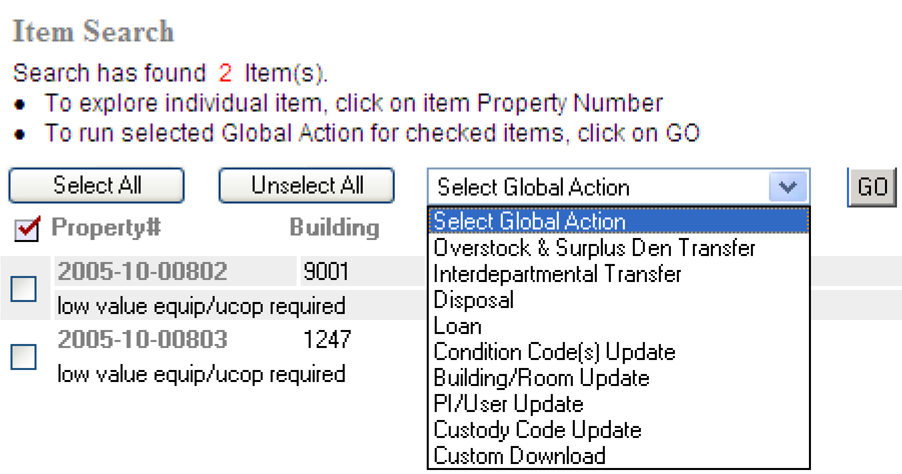
- Conduct global changes to assets
- Submit global EIMR's
- Create Custom Download

The Equipment Custodian is assigned global access during account set up by Equipment Management.
The Equipment Custodian assigns global action access to other users in the department during account setup.

- Global actions may include asset updates or EIMR requests.
- A pull down menu provides global action types.
- Use the Item Search Screen to locate all items for global action.

To process Global Action:

- Check box next to property number to select individual items or check Select All to process global action on all items
- Select type of global action from pull down menu
- To run selected global action for check items, click GO

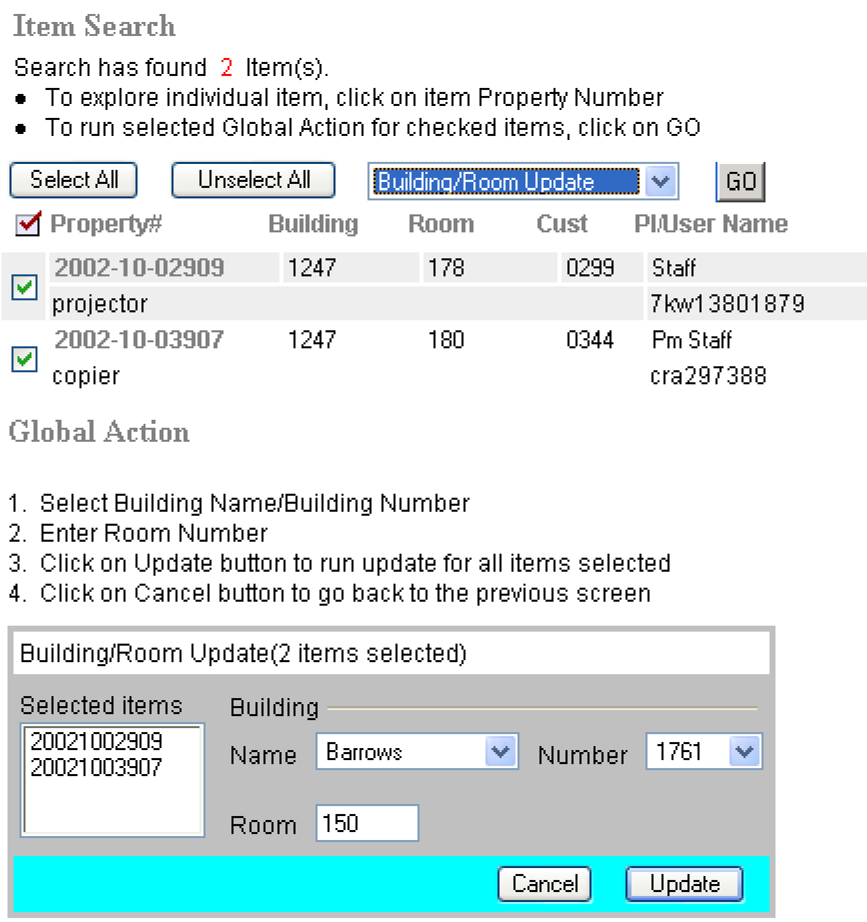


Global Action – Building

To change the building and room number for selected assets:

- Check box next to property number to select individual items or check Select All to process global action on all items.

- Select Building/Room Update under select global action, click GO.
- Click on item property number to view details of individual item(s)



The Selected Items column shows the property numbers requested for global action building change.

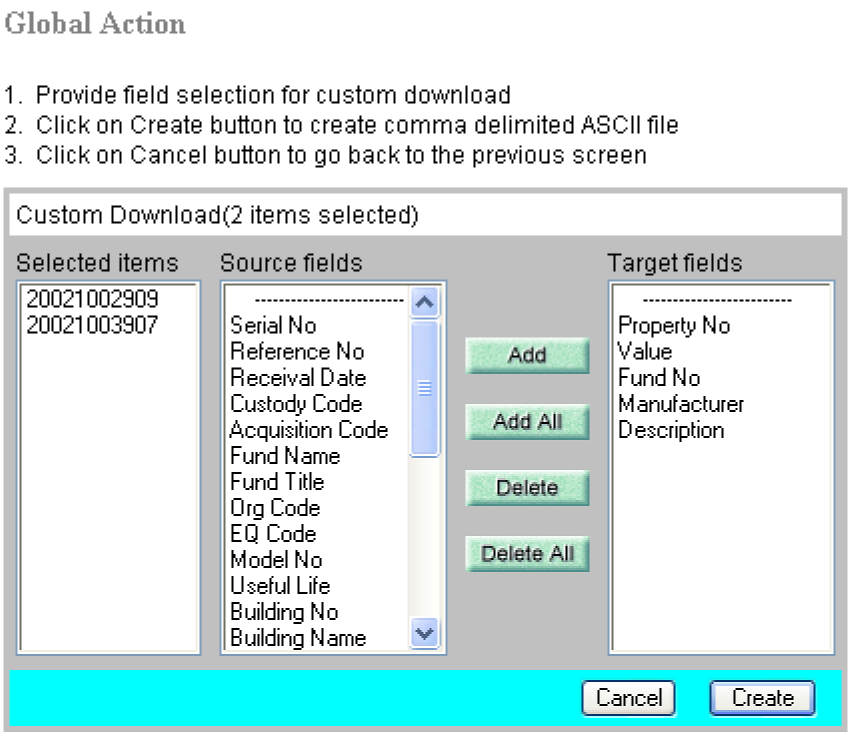
To update building name or number:

- Use pull down Building to select new building by name or number
- Click on building number if the building number is not known.
- Enter the first digit of the building number or first letter of the building name to move quickly through selections.
- Enter room number (must be valid room number)
- Click on Update button to run update for all items selected
- Click on Cancel button to go back to previous screen

Custom Download

The custom download provides a report of items based on selection criteria and fields selected. Property numbers selected during Item Search will display on the Item Search screen.

- **Check** each property number to include in custom download or click **Select All**.
- Select **Custom Download** from **Select Global Action** pull down menu.
- Click on **Go** to start process for selected items.



To create custom download for property numbers listed under **Selected Items:**

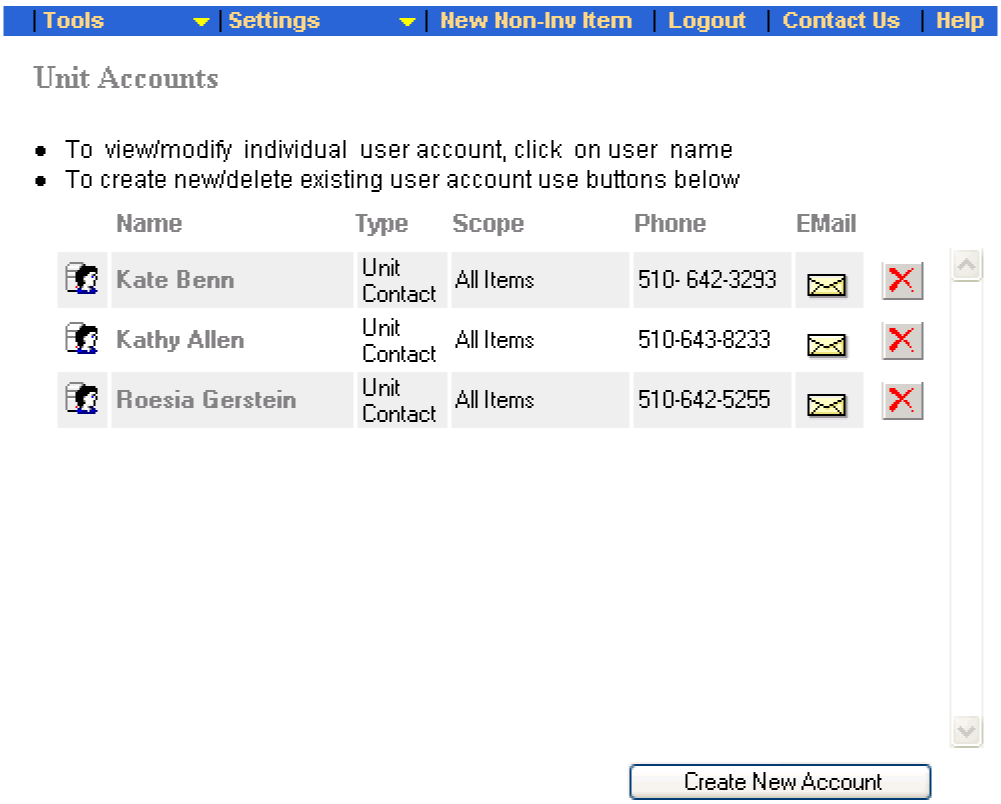
- Choose field listed under **Source fields**
- Click **Add** to move Source fields to **Target fields**
- Click **Create** to create comma delimited ASCII file to be used in Excel or other software
- Click on **Cancel** button to go back to the previous screen.

Tool Bar - Tools

This section provides instructions on how to use the Unit Accounts screen listed under the Tools menu.

The Equipment Custodian is responsible for managing individual user accounts for their department.

Unit Accounts

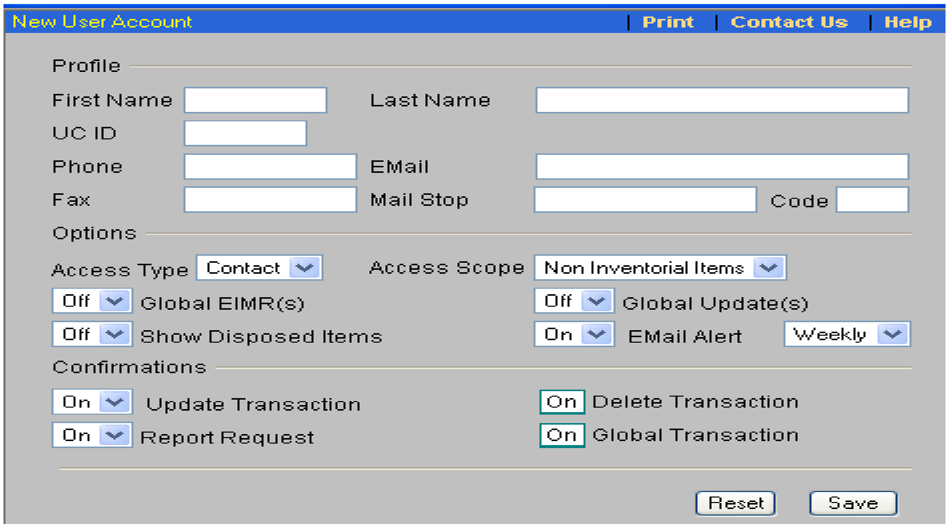


The following fields are displayed for every user account:

- User Name (link to User Account details page)
- Access Type (Contact/Inquiry)
- Access Scope (All Items/Inventorial Items/Non Inventorial Items/Disabled)
- Phone
- Email
- X (click X to delete user)

To create a new user account, click on **Create New Account** button on **Unit Accounts** screen.

Create New User Account



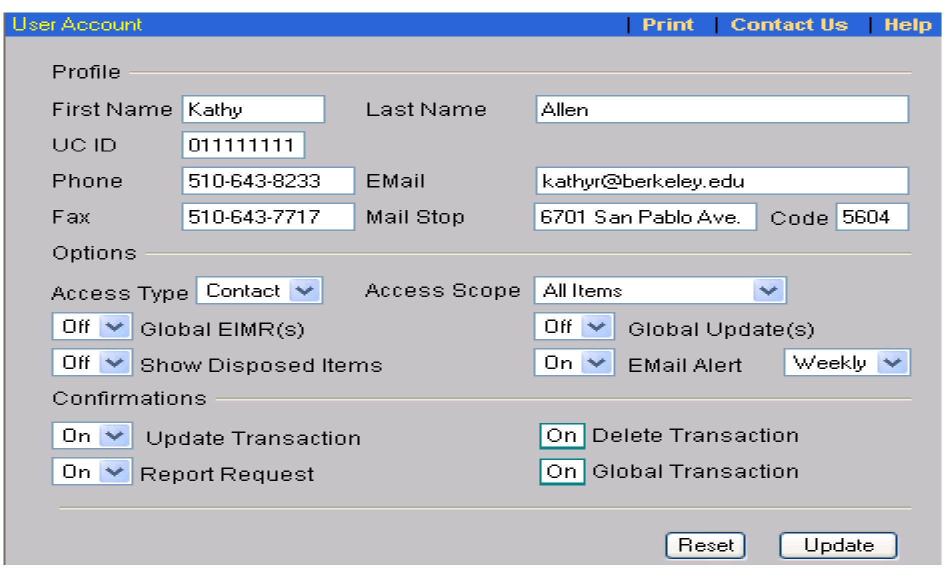
Populate required fields under **Profile** section with new account information.

Use the pull-down menus to assign **Access Type** and **Access Scope**.

Click on **Save** button to add new user to system.

Click on **Reset** button before you save to restore original information.

Update User Account



Update current user information.
Click Update button to save changes.
Click Reset button before you click Update to restore old values of fields.

Tool Bar - Settings

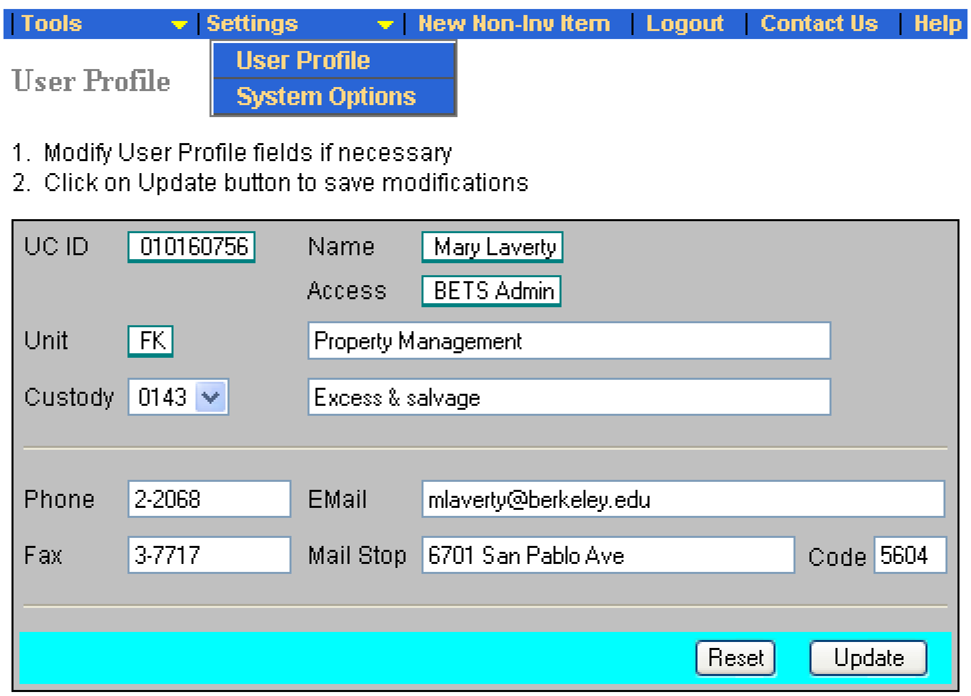
This section provides instructions on how to modify User Profile or System Options.

To change User Profile, make selection from pull-down menu under Settings.

User Profile

This screen displays fields initially populated during the setup of a new user on the Create New User Account Screen.

Information displayed on the lower portion of the User Profile screen may be modified.



Click **Update** button to save changes.

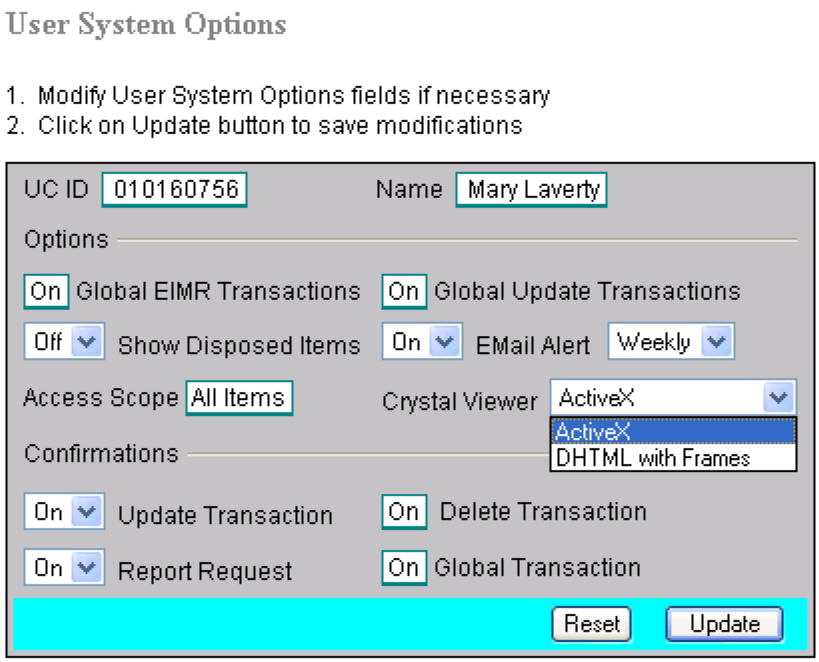
Click **Reset** button before you click Update to restore old values of fields.

System Options

To modify **System Options**, make selection from pull-down menu under Settings.

This screen displays fields initially populated during the setup of a new user on the **Create New User Account Screen**.

Only fields with pull-down menus may be modified.



Options:
Email Alert is initially established during setup and is used to notify the Equipment Custodian when EIMR's or Equipment Loan transactions require attention.

Crystal Viewer client (ActiveX, DHTML with frames) is used to handle all reporting needs. Capabilities of client depend on user platform (PC, MAC) and web browser used.

Settings for Crystal Viewer client may be verified or changed.

Confirmations:
Update Transaction – Receive a popup system confirmation when fields are updated.
Report Request – Receive a popup system confirmation when a report is requested.
Settings for Delete Transactions or Global Transaction cannot be modified.

Click the **Update** button to save changes.

Click the **Reset** button before you click Update to restore old values of fields.

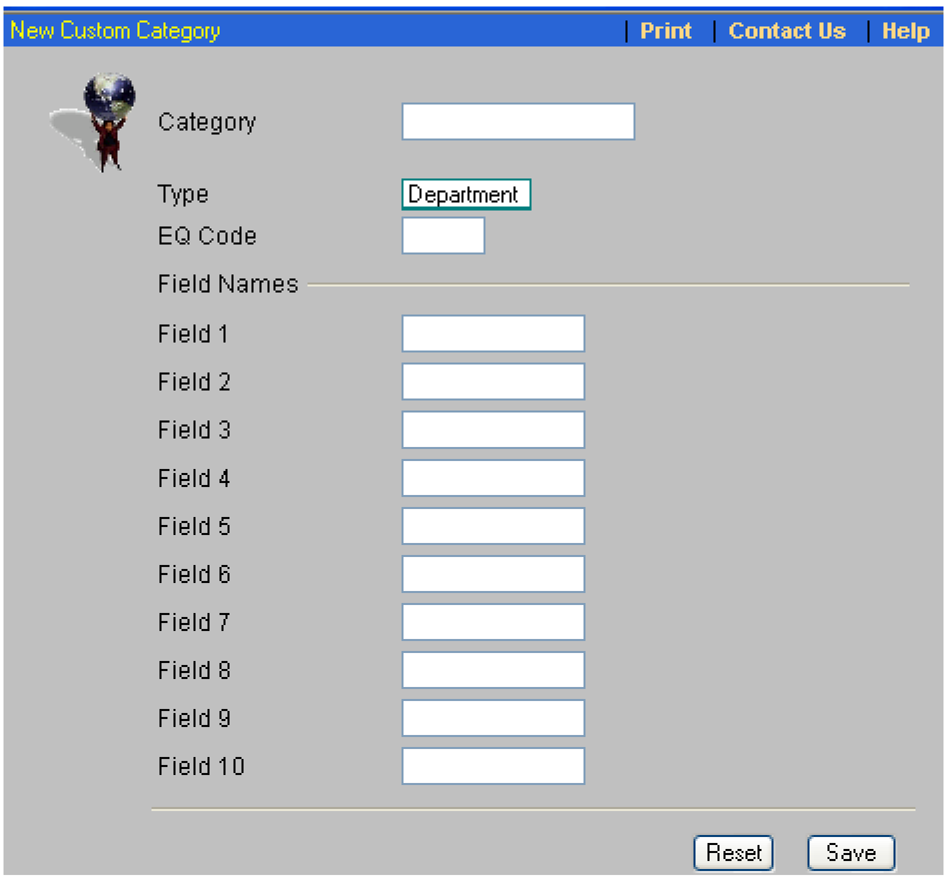
Custom Categories

This section provides instructions on how to use and manage **Custom Categories**.

By the end of this section, you will be able to:

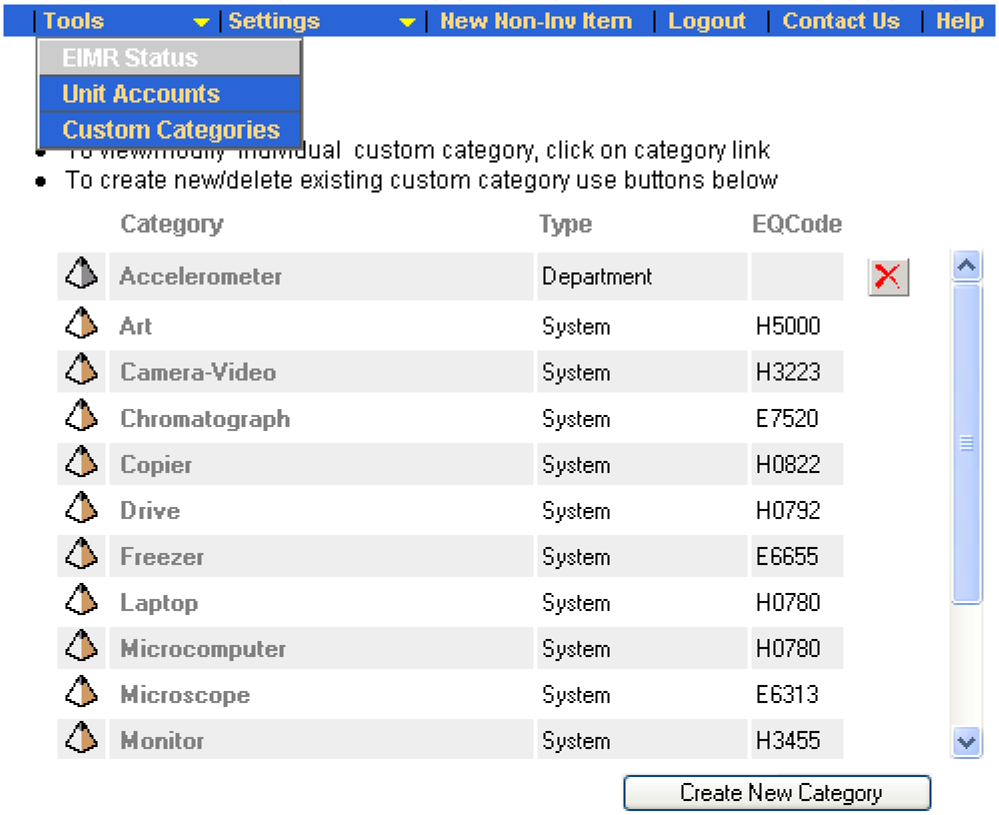
- Manage (View/Create/Update/Delete) Custom Categories
- Assign item to Custom Category

New Custom Category



The Equipment Custodian uses the **New Custom Category** screen to manage (view/modify/create/delete) custom item classifications. This screen provides departmental users with the ability to add up to 10 custom fields to any inventorial or non-inventorial item.

Individual Custom Category



Following fields are displayed for every Custom Category:

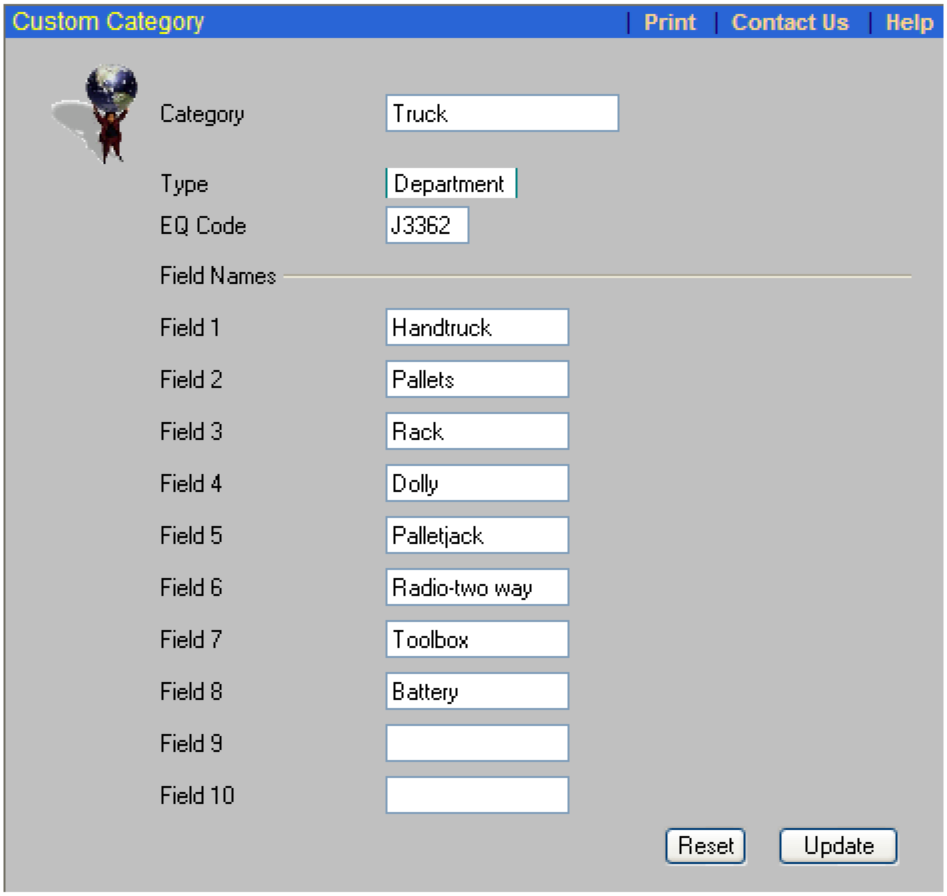
- Category Name
- Category Type (System/Department)
- EQ Code

There are two types of **Custom Categories**:

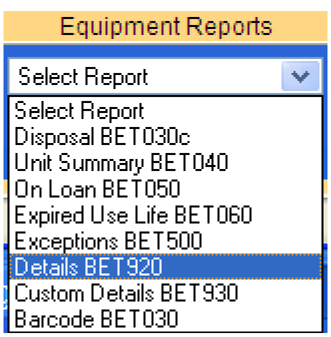
- **System** - established by Equipment Management and used by all units.
- **Department** - established by Equipment Custodian and may be used and modified only by department who created it.

To update an existing **Custom Category** – click on category name link on the **Custom Category** screen. Update required fields and click **Update**. Only **department type categories** may be updated/deleted.

Example: New Custom Category set up for a Truck

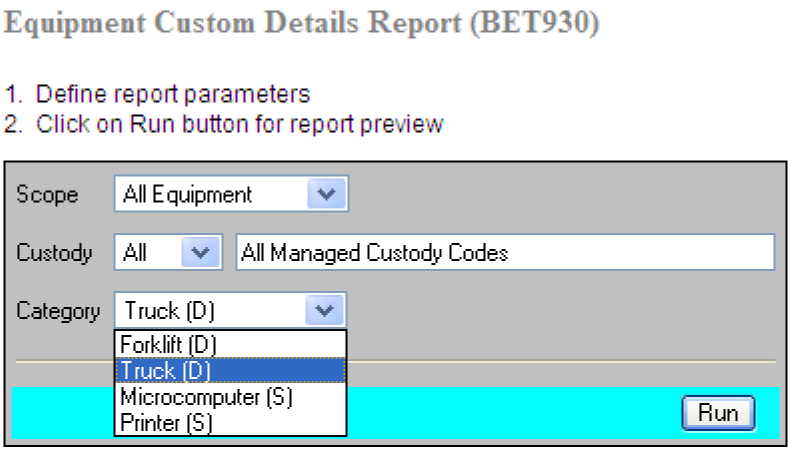


To Run a Report on Custom Category for Asset

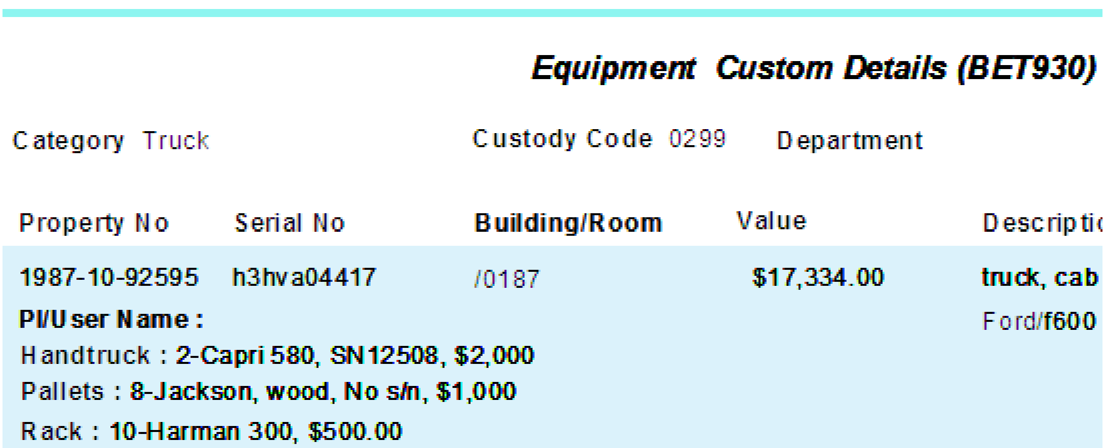


Select Custom Details BET930 from Reports

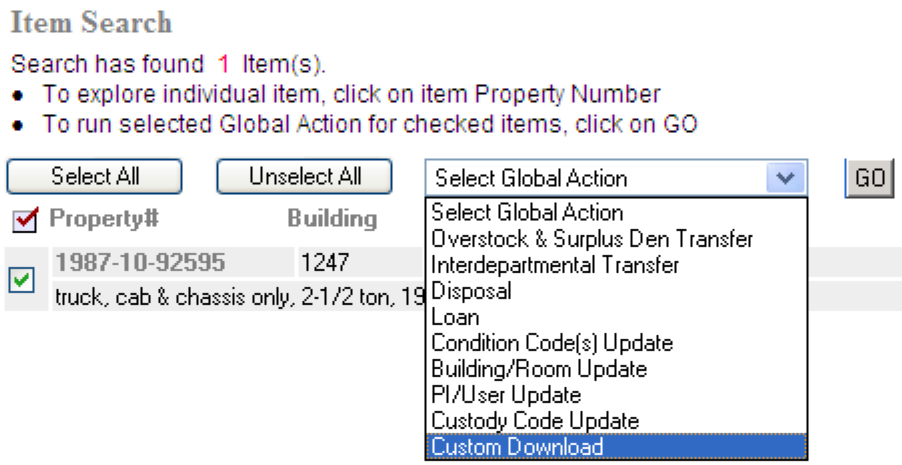
Equipment Custom Details Report (BET930)



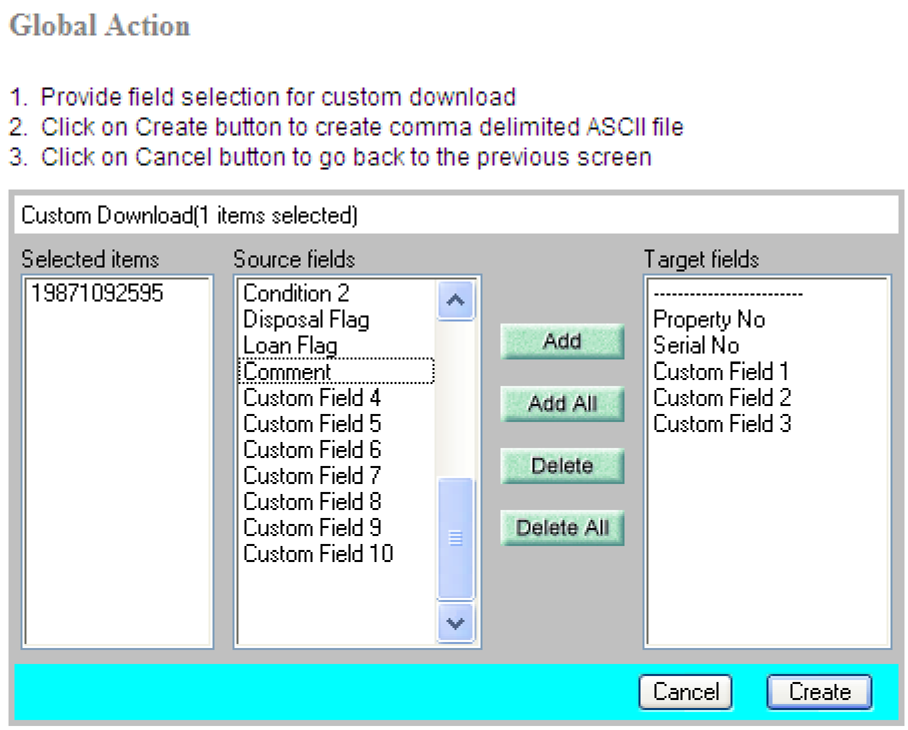
Report lists Property number with Asset details and Custom Categories



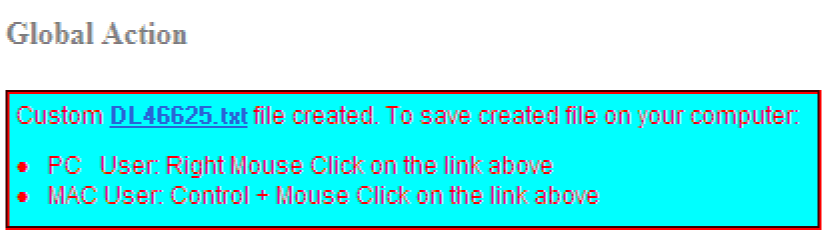
Printing a Custom Category report of specific property number using Excel



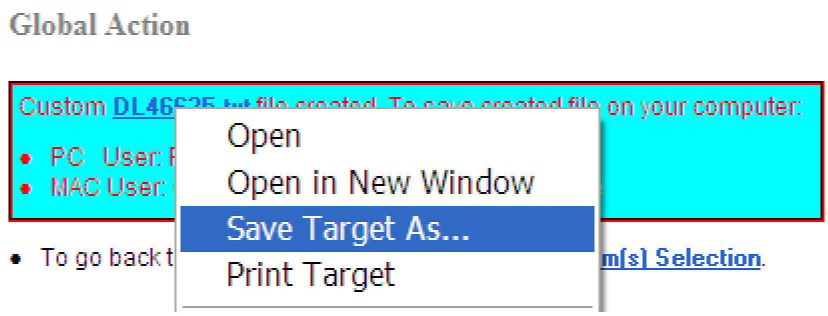
Select property number and click on Custom Download from Select Global Action pull down menu and click GO.



Double click on Source field choices to move them to Target fields
Click on Create when all choices have been made. This will create a comma delimited ASCII file.

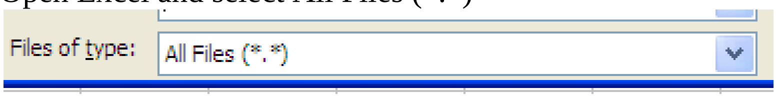


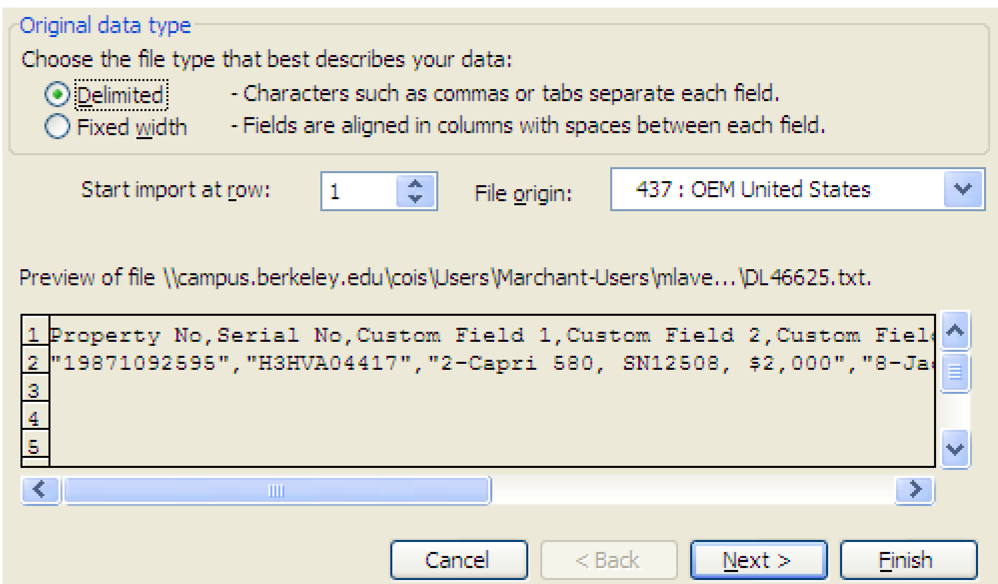
PC User: Right Mouse Click on the link
MAC User: Control + Mouse Click on the link



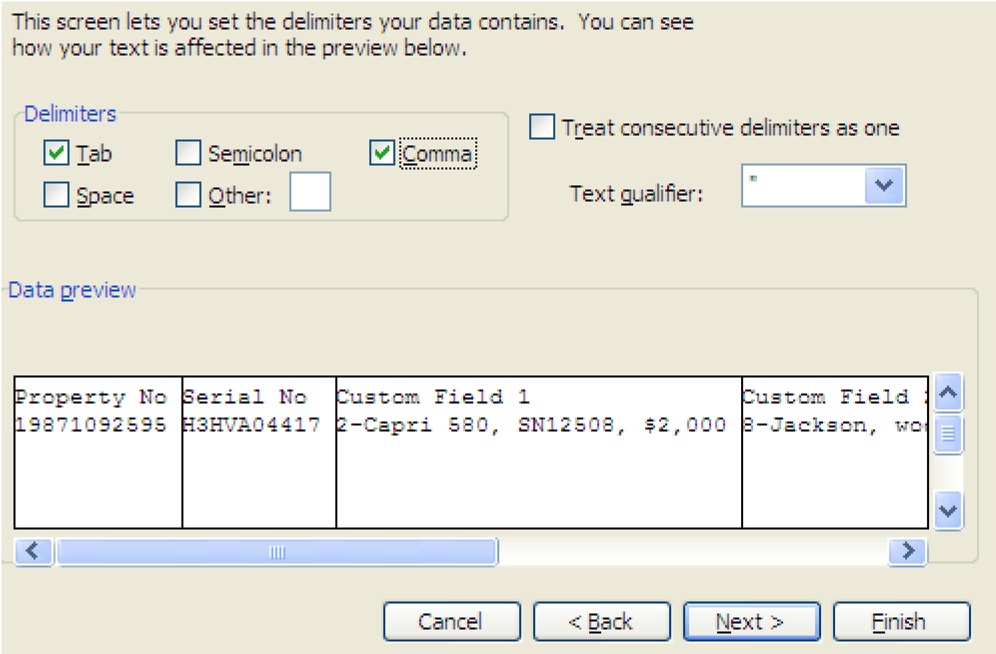
Select Save Target As to save file

Open Excel and select All Files (*.*)

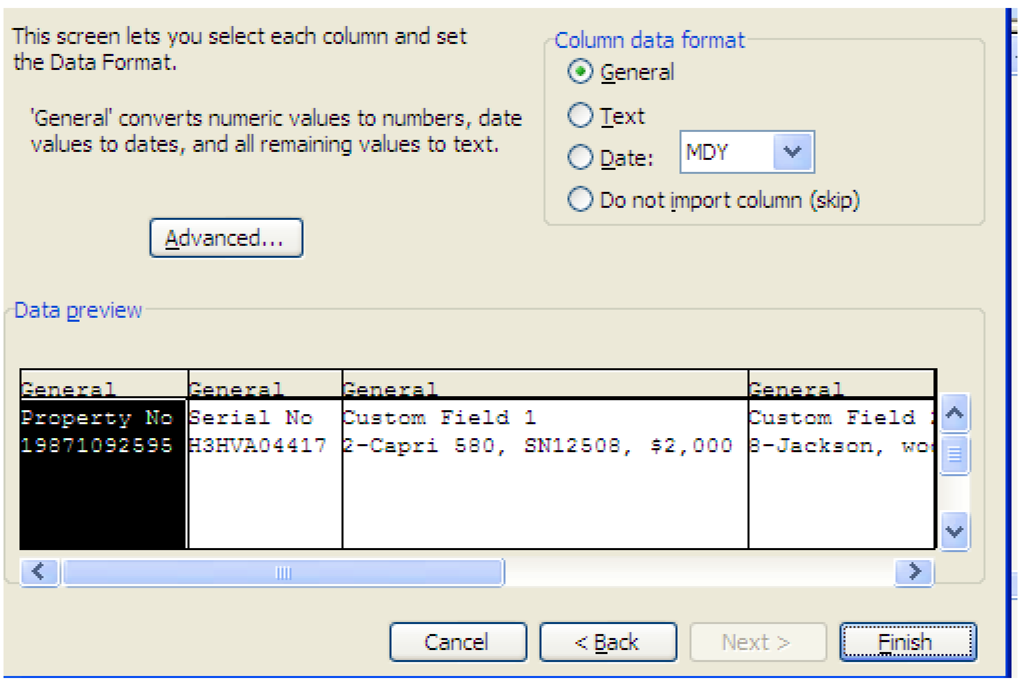




Select Delimited and click Next



Click on Comma and click Next



Click on Finish to view Excel file

Non-Inventorial Asset

The acquisition threshold for inventorial equipment is $5,000. Items acquired for less than $5,000 are not tracked in the Inventorial module of BETS, but may be tracked using the Non-Inventorial module.

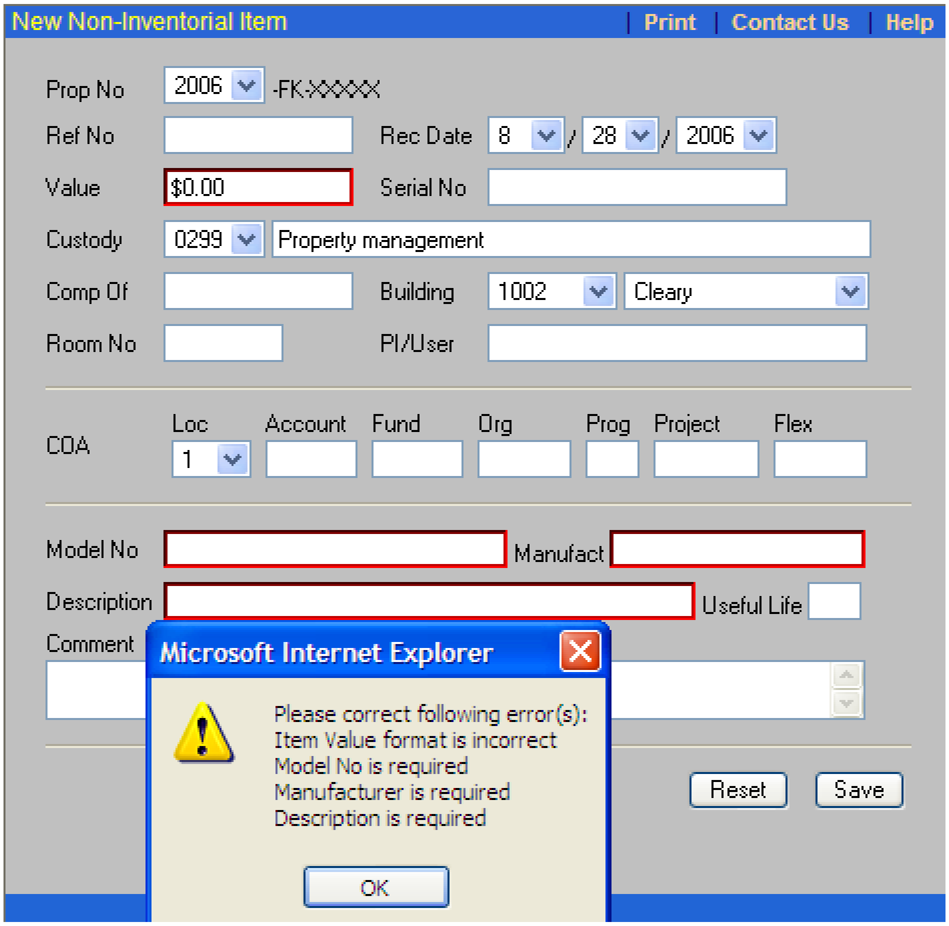
Items under $5,000 previously recorded in BETS were moved to the non-inventorial module.

New purchases of non-inventorial items may be added to this module and disposed of through the Cal Overstock & Surplus Den by submitting an EIMR.

To create a new Non-Inventorial item, click on **New Non-Inv Item** on the Tool Bar**.**

The following fields are required:

- **Prop No -** Property number consists of year of purchase, two-character Unit code and five sequential systems generated numbers. (e.g., 2004-FK-00001)
- **Value** – Value of item from purchase document.
- **Model No** – Manufacturer's Model number.
- **Manufacturer** –Manufacturer's Name.
- **Description** – Description of item.



An error flag will appear if required fields are not completed.

Additional fields **not required** by the system to create item, but beneficial for tracking purposes:

- **Ref Number** – Reference Number refers to document used to purchase item. (e.g., purchase order, TSE order)
- **Rec Date** – Default is current date. Department receives use full down date menu to select date item.
- **Serial No** – Manufacturer's serial number on item.
- **Custody** – Select Custody Code from pull down menu.
- **Department** – Department name associated with selected Custody Code.
- **Comp Of** – Property number of component used with this item.
- **Building** – Select Building Number and Name from pull down menu.
- **Room No** – Enter room location of equipment.
- **COA** – Enter Chart of Accounts information from purchase document.
- **Useful Life** – Useful Life is located on the Equipment Management website.
- **Comment** – Enter comments if needed.

Click **Save** to add new **Non-Inventorial** item to records.
Click Reset button before you click Update to restore old values.

Non-Inventorial items may be included in search on **Item Search** screen.

Non-Inventorial items added to BETS by Equipment Management

- Items costing less than $5,000 with an expended useful life were moved from the department's **Inventorial** module to the **Non-Inventorial** module. .

Item Search

Search has found 12 Item(s).

- To explore individual item, click on item Property Number
- To run selected Global Action for checked items, click on GO

Select All | Unselect All | Select Global Action | GO

Property#	Building	Room	Cust	PI/User Name
2004-FK-00002	1247	0218	0299	Laverty
microcomputer				kclk3ky
2004-FK-00003	1247	0218	0299	Crawford
microcomputer				kclh3nl
2004-FK-00004	1247	0187a	0299	Anglim
microcomputer				kclc4bf

Transfer and Disposal of Non-Inventorial Items

- Disposal of all Non-inventorial items through Cal Overstock & Surplus Den requires that you submit an EIMR for pickup of the items.
- Use one of the Disposal codes listed on the EIMR pull down menu for items dismantled or junked internally within your department.
- EIMR's submitted for Transfer of Non-inventorial items are not processed by Equipment Management. These transactions are processed directly by Cal Overstock & Surplus Den.

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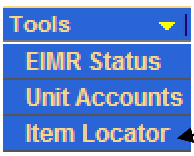
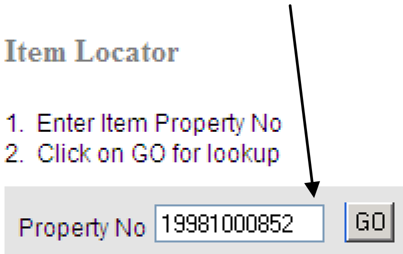
Item Locator-Search Entire Database by UC Property Number

This feature will allow the user to search BETS by UC Property Number for equipment not assigned to their Custody Code.

From the **Main Toolbar** select the **Tools** pull down Menu and choose **Item Locator**



Enter the **UC Property Number** of the item you are trying to locate and click **GO**



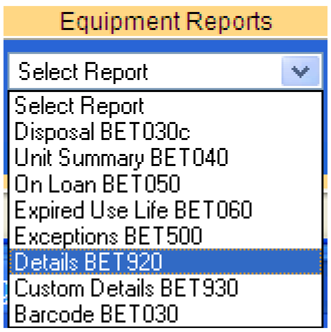
Information associated with the UC Property Number will be displayed on the screen.

Property No	1998-10-00852
Status	Active
Description	Truck, cab & chassis
Department	Property Management
Custodian	Kristi Mares
EMail	kristim@berkeley.edu
Phone	(510) 642-5374

Reports

Reports are listed under the Equipment Reports pull down menu.

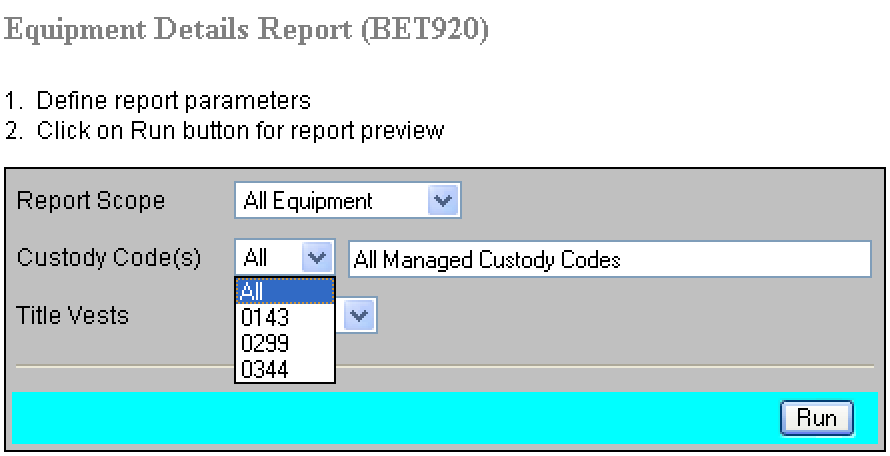
Parameters may be defined on all reports based on report selected.



To print, save or preview a report:
- From pull down menu select report
- Define parameters of report
- Click on Run button

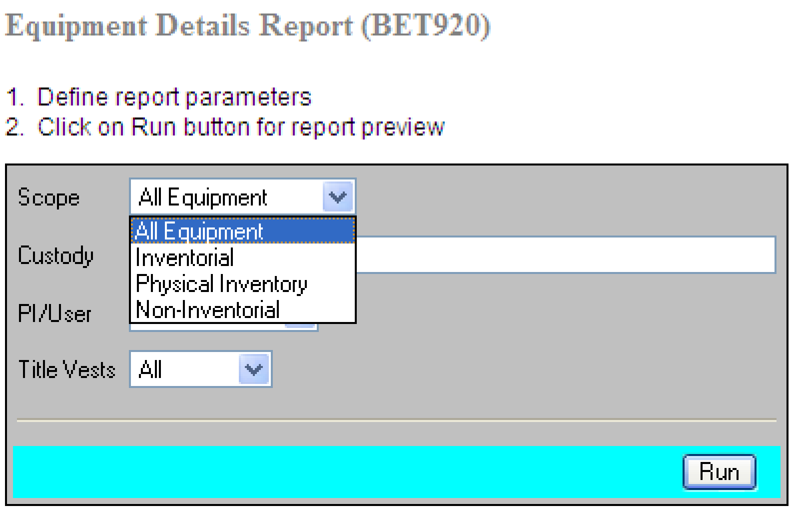
To Produce BET920 Annual Equipment Details Report select custody code from pull down menu.

Default is set at **All Managed Custody Codes**, if a department has more than one custody code use pull down menu to select specific custody code for report.

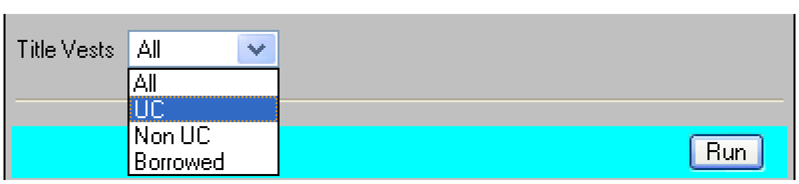


Define Report Parameters

- **All Equipment-**lists all equipment assigned to the specific custody code.
- **Inventorial-**lists items over $5,000 and items less than $5,000 with remaining useful life
- **Physical Inventory-** provides a list of equipment that departments must verify during the biennial physical inventory of their departments' equipment.
- **Non-inventorial-**lists non inventorial items with an acquisition value less than $5,000. (These items were initially inventorial and were moved from the inventorial module when the equipment threshold changed to $5,000). Departments may also create non-inventorial assets for new purchases under $5,000.



Reports may be produced according to ownership by selecting a **Title Vests** option.



- **All**-report will list all equipment under selected custody code.
- **UC**-report will list equipment where title is vested in UC.
- **Non-UC**-report will list equipment where title is vested in the federal government.
- **Borrowed-report** will list equipment on loan to UC from a non-UC entity.

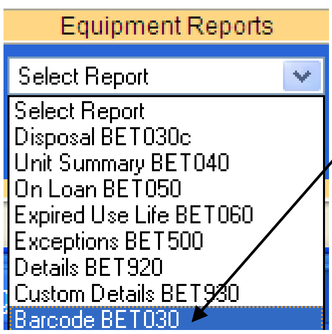
Printing Barcode Property Tags

Barcode Tags may be printed for non-inventorial items.

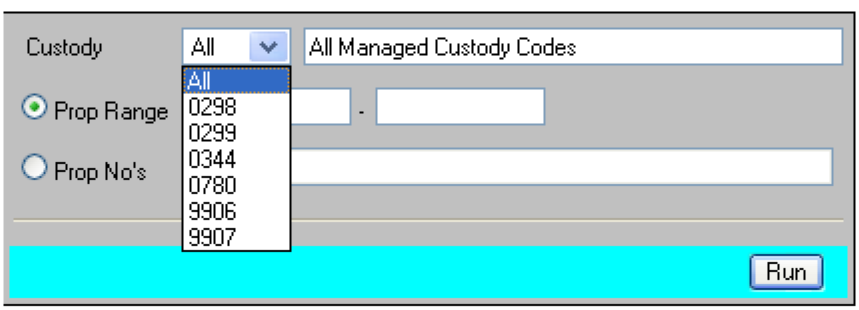
- The standard Avery 2.625 x 1 label may be used for printing adhesive tags.
- Set printing option **Page Scaling** to **None** if using Avery labels.
- Be sure that printed Barcode labels are readable by scanner.

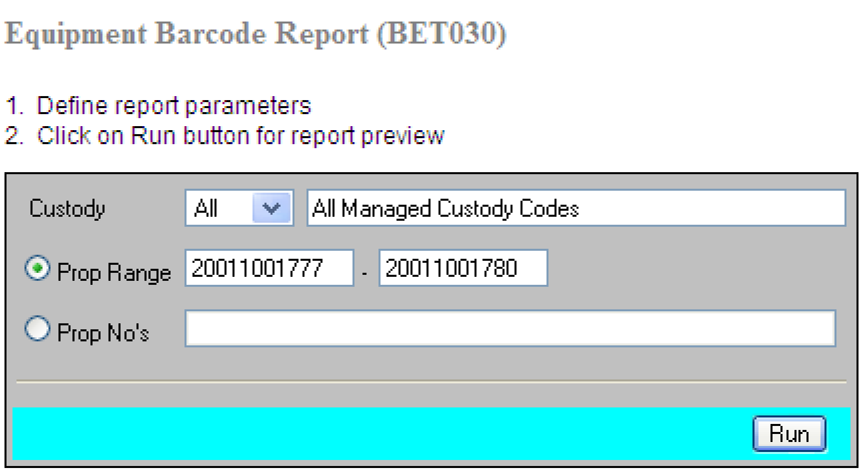
➢ **Note: Equipment Management is responsible for printing barcode tags for inventorial equipment.**

To print barcode tags select **Barcode BET30B** from the **Reports** pull down menu

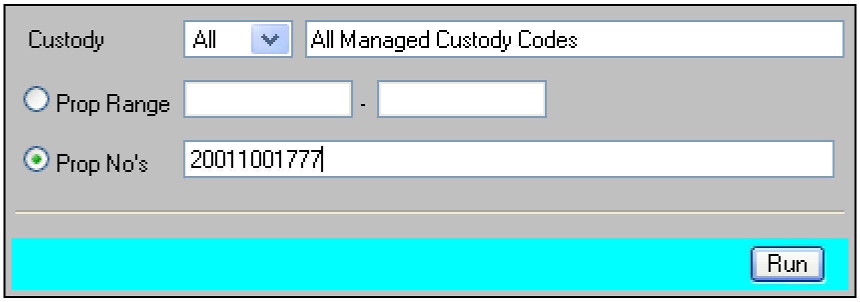


The **Custody Code** default is set at **All Managed Custody Codes**.
Select from pull down menu to select specific code, if you have multiple Custody Codes.



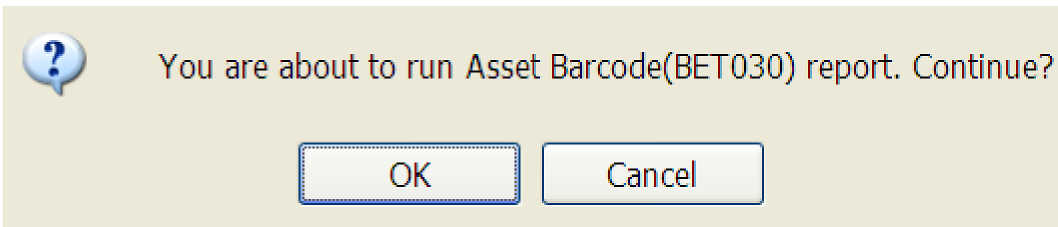


To print barcode tags for a specific range of property numbers, select **Prop Range** and enter a sequential range of property numbers.



To print barcode tags for individual property numbers, select **Prop No's** and enter one property number or enter multiple numbers, separated by comma delimeter.

After you click **Run** the following message will appear. Click **OK**



The barcode tag will print onto the Avery label.

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Projector-lcd
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