



## Contents

The Berkeley Equipment Tracking System-BETS .....	3
BETS Login.....	4
Welcome Screen.....	5
Equipment Inventory Modification Request (EIMR) Status .....	6
EIMR Search for Approval Pending .....	7
EIMR Search Results .....	7
Access Type is based on security level assigned to user .....	8
Printing the Equipment Inventory Modification Request-EIMR .....	9
The Print EIMR option provides a paper copy of selected EIMR's .....	10
Global Action – Building .....	11
Custom Download .....	12
Tool Bar - Tools .....	14
Unit Accounts .....	14
Create New User Account .....	15
Update User Account .....	15
Tool Bar - Settings.....	17
User Profile.....	17
System Options.....	17
Custom Categories.....	19
New Custom Category.....	19
Individual Custom Category.....	20
To Run a Report on Custom Category for Asset.....	21
Equipment Custom Details Report (BET930).....	22
Printing a Custom Category report of specific property number using Excel .....	23
Non-Inventorial Asset .....	26
Non-Inventorial items added to BETS by Equipment Management .....	28
Item Locator-Search Entire Database by UC Property Number .....	29
Reports.....	30
Define Report Parameters.....	31



# The Berkeley Equipment Tracking System-BETS

**Berkeley Equipment Tracking System**  
UNIVERSITY OF CALIFORNIA BERKELEY

[Login](#) | [Contact Us](#) | [Help](#)

**Welcome to BETS,  
Berkeley Equipment Tracking System**

BETS tracks inventorial and non-inventorial equipment and was designed specifically to meet the unique needs of the University of California, Berkeley. BETS provides advanced systems technology solutions to Equipment Management's operations.

- To start your BETS session, click [Login](#).  
(Valid Calnet ID and BETS account is required)
- To ask us a question, click [Contact Us](#).
- To get online support, click [Help](#).

**References**

- Equipment Management
- Business Services
- UCOP Strategic Sourcing

**News**

Joint effort by UC Property Management, ASD and UC Campus departments to redesign BETS started at the end of 2001.

New BETS is in production as of November 8, 2004.

Equipment Management | ASD-DTS | UC Berkeley  
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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](#)

## BETS Login



### Authentication Web Server (AWS)

Please identify yourself with your [CalNet](#) ID to access the following application:

**Current CalNet ID:**

**Passphrase:**

The CalNet passphrase is *case sensitive*, so make sure to use correct capitalization when appropriate and that Caps Lock is not set on your keyboard.

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.

## Welcome Screen

Welcome Mary,

Today is June-22-2007.

- To explore BETS user interface, use navigation and search controls.
- To ask us a question, click [Contact Us](#).
- To get online support, click [Help](#).
- To close BETS session, click [Logout](#).

System Information:

Please, make sure to read topic "BETS Frequently Asked Questions" in BETS Help if your experience any problem.

Attention Items:

- Your approval is required for 3 Modification Request(s) → [GO](#)

From the Welcome User Screen you may:

- **Contact Us:** to ask a question or report a technical problem. Contact us at [betshelp@berkeley.edu](mailto: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**.

## 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.

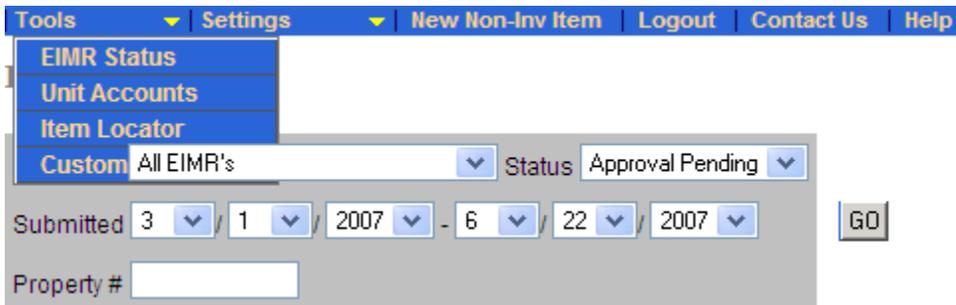
The system sets the Category default at All EIMR's and the EIMR Standing at Approval Pending.

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.



The screenshot shows the Berkeley Equipment Tracking System interface. At the top, there is a navigation bar with the following items: Tools, Settings, New Non-Inv Item, Logout, Contact Us, and Help. Below this, a dropdown menu is open, showing options: EIMR Status, Unit Accounts, Item Locator, and Custom. The Custom option is selected, and the search criteria are set to 'All EIMR's'. The Status dropdown is set to 'Approval Pending'. The Submitted date range is set to 3/1/2007 - 6/22/2007. There is a 'GO' button to the right of the date range. Below the date range, there is a 'Property #' input field.

## *EIMR Search for Approval Pending*

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

### **EIMR Status**

The screenshot shows a search interface with the following elements:

- Category:** A dropdown menu with 'All EIMR's' selected. A list of options is visible: 'All EIMR's', 'Overstock&Surplus Den Transfer', 'Interdepartmental Transfer', 'Disposal', 'Loan', and 'FAB Adjustment'.
- Status:** A dropdown menu with 'Approval Pending' selected.
- Submitted:** Three date range selectors: '3 / 1 / 2007', '6 / 6 / 2007', and '6 / 6 / 2007'.
- Property #:** A text input field.
- GO:** A button to execute the search.

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

### **EIMR Status**

The screenshot shows a search interface with the following elements:

- Category:** A dropdown menu with 'All EIMR's' selected.
- Status:** A dropdown menu with 'Approval Pending' selected. A list of options is visible: 'Approval Pending', 'Process Pending', 'Processed', 'Rejected', and 'Denied'.
- Submitted:** Three date range selectors: '3 / 1 / 2007', '6 / 6 / 2007', and '6 / 6 / 2007'.
- Property #:** A text input field.
- GO:** A button to execute the search.

- EIMR Status:
  - Approval Pending
  - Process Pending
  - Processed
  - Rejected
  - Denied

The screenshot shows a search interface with the following elements:

- Submitted:** Three date range selectors: '3 / 1 / 2007', '6 / 6 / 2007', and '6 / 6 / 2007'.
- Property #:** A text input field.
- GO:** A button to execute the search.

- 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

<p><b>Access Type is based on security level assigned to user</b></p>
---

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.**

### EIMR Status

Category  Status

Submitted  /  /  -  /  /

Property #

1 EIMR(s) found.

- To explore individual item/EIMR details, click on item Property Number
- To approve/reject/cancel EIMR for checked items, click on buttons below

<input checked="" type="checkbox"/>	Property#	Cust	Category	Submitted	EIMR#	Processed
<input checked="" type="checkbox"/>	1998-10-03712	0143	D&S_Transfer	08/21/2006	T000003123	08/21/2006
Submitted by:Kristi Mares						

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)**

<b>EIMR Type</b>	Disposal	<b>EIMR No</b>	D000044563
<b>Submitter</b>	Mary Lavery	<b>Date</b>	10/03/2006
<b>Phone</b>	2-2068	<b>E-Mail</b>	mlavery@berkeley.edu
<b>Property No</b>	2006-10-00612	<b>Ref(PO) No</b>	0000000001
<b>Custody Code</b>	9906	<b>Department</b>	Ucop-Yearend Capitalization
<b>Building No</b>	9001	<b>Building</b>	Offcampus
<b>Room No</b>	NONE	<b>Value</b>	\$1,298,571.59
<b>Serial No</b>	NONE	<b>PI/User</b>	
<b>Description</b>	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

### Item Search

Search has found 2 Item(s).

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

<input type="button" value="Select All"/> <input type="button" value="Unselect All"/>		<input type="button" value="Select Global Action"/>	<input type="button" value="GO"/>
<input checked="" type="checkbox"/>	<b>Property#</b>	<b>Building</b>	<div style="border: 1px solid black; padding: 5px;">             Select Global Action              Overstock &amp; Surplus Den Transfer              Interdepartmental Transfer              Disposal              Loan              Condition Code(s) Update              Building/Room Update              PI/User Update              Custody Code Update              Custom Download           </div>
<input type="checkbox"/>	2005-10-00802	9001	
	low value equip/ucop required		
<input type="checkbox"/>	2005-10-00803	1247	
	low value equip/ucop required		

### 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)

### Item Search

Search has found 2 Item(s).

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

<input checked="" type="checkbox"/>	Property#	Building	Room	Cust	PI/User Name
<input checked="" type="checkbox"/>	2002-10-02909 projector	1247	178	0299	Staff 7kw13801879
<input checked="" type="checkbox"/>	2002-10-03907 copier	1247	180	0344	Pm Staff cra297388

### Global Action

1. Select Building Name/Building Number
2. Enter Room Number
3. Click on Update button to run update for all items selected
4. Click on Cancel button to go back to the previous screen

Building/Room Update(2 items selected)

Selected items	Building	
20021002909 20021003907	Name <input type="text" value="Barrows"/>	Number <input type="text" value="1761"/>
	Room <input type="text" value="150"/>	

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.

## Global Action

1. Provide field selection for custom download
2. Click on Create button to create comma delimited ASCII file
3. Click on Cancel button to go back to the previous screen

Custom Download(2 items selected)

Selected items	Source fields	Target fields
20021002909 20021003907	Serial No Reference No Receival Date Custody Code Acquisition Code Fund Name Fund Title Org Code EQ Code Model No Useful Life Building No Building Name	Property No Value Fund No Manufacturer Description

Buttons: Add, Add All, Delete, Delete All, Cancel, Create

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

---

Tools Settings New Non-Inv Item Logout Contact Us Help

### Unit Accounts

- To view/modify individual user account, click on user name
- To create new/delete existing user account use buttons below

Name	Type	Scope	Phone	E-Mail
 Kate Benn	Unit Contact	All Items	510- 642-3293	 
 Kathy Allen	Unit Contact	All Items	510-643-8233	 
 Roesia Gerstein	Unit Contact	All Items	510-642-5255	 

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

---

**New User Account** | [Print](#) | [Contact Us](#) | [Help](#)

**Profile**

First Name  Last Name

UC ID

Phone  Email

Fax  Mail Stop  Code

**Options**

Access Type  Access Scope

Global EIMR(s)  Global Update(s)

Show Disposed Items  EMail Alert

**Confirmations**

Update Transaction  Delete Transaction

Report Request  Global Transaction

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

---

**User Account** | [Print](#) | [Contact Us](#) | [Help](#)

**Profile**

First Name  Last Name

UC ID

Phone  Email

Fax  Mail Stop  Code

**Options**

Access Type  Access Scope

Global EIMR(s)  Global Update(s)

Show Disposed Items  EMail Alert

**Confirmations**

Update Transaction  Delete Transaction

Report Request  Global Transaction

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.



1. Modify User Profile fields if necessary
2. Click on Update button to save modifications

UC ID	<input type="text" value="010160756"/>	Name	<input type="text" value="Mary Laverty"/>	
		Access	<input type="text" value="BETS Admin"/>	
Unit	<input type="text" value="FK"/>		<input type="text" value="Property Management"/>	
Custody	<input type="text" value="0143"/>		<input type="text" value="Excess &amp; salvage"/>	
Phone	<input type="text" value="2-2068"/>	E Mail	<input type="text" value="mlaverty@berkeley.edu"/>	
Fax	<input type="text" value="3-7717"/>	Mail Stop	<input type="text" value="6701 San Pablo Ave"/>	Code <input type="text" value="5604"/>
<input type="button" value="Reset"/> <input type="button" value="Update"/>				

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.

### User System Options

1. Modify User System Options fields if necessary
2. Click on Update button to save modifications

The screenshot shows a form for user system options. At the top, there are two text input fields: 'UC ID' with the value '010160756' and 'Name' with the value 'Mary Lavery'. Below these is a section titled 'Options' containing several controls: 'Global EIMR Transactions' (On), 'Global Update Transactions' (On), 'Show Disposed Items' (Off), and 'Email Alert' (On) with a frequency dropdown set to 'Weekly'. The 'Access Scope' is set to 'All Items'. The 'Crystal Viewer' dropdown menu is open, showing 'ActiveX' as the selected option and 'DHTML with Frames' as an alternative. Below the 'Options' section is a 'Confirmations' section with four controls: 'Update Transaction' (On), 'Delete Transaction' (On), 'Report Request' (On), and 'Global Transaction' (On). At the bottom of the form are two buttons: 'Reset' and 'Update'.

#### 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

---

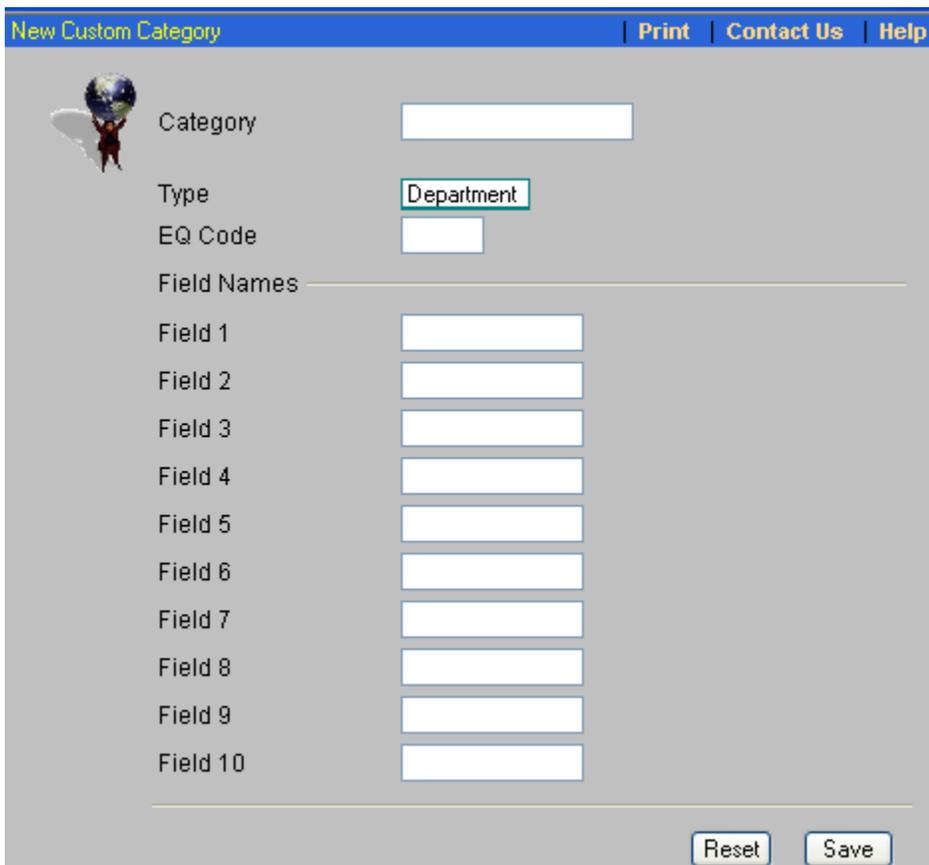
This section provides instructions on how to use and manage **Custom Categories**.

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

---



New Custom Category | [Print](#) | [Contact Us](#) | [Help](#)

 Category

Type

EQ Code

Field Names

Field 1

Field 2

Field 3

Field 4

Field 5

Field 6

Field 7

Field 8

Field 9

Field 10

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

Tools Settings New Non-Inv Item Logout Contact Us Help

EIMR Status  
Unit Accounts  
Custom Categories

- To view/modify individual custom category, click on category link
- To create new/delete existing custom category use buttons below

Category	Type	EQCode	
 Accelerometer	Department		
 Art	System	H5000	
 Camera-Video	System	H3223	
 Chromatograph	System	E7520	
 Copier	System	H0822	
 Drive	System	H0792	
 Freezer	System	E6655	
 Laptop	System	H0780	
 Microcomputer	System	H0780	
 Microscope	System	E6313	
 Monitor	System	H3455	

Create New 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**

**Custom Category** | [Print](#) | [Contact Us](#) | [Help](#)



Category

Type

EQ Code

Field Names

---

Field 1

Field 2

Field 3

Field 4

Field 5

Field 6

Field 7

Field 8

Field 9

Field 10

***To Run a Report on Custom Category for Asset***

**Equipment Reports**

Select Report

- Select Report
- Disposal BET030c
- Unit Summary BET040
- On Loan BET050
- Expired Use Life BET060
- Exceptions BET500
- Details BET920**
- Custom Details BET930
- Barcode BET030

Select Custom Details BET930 from Reports

## Equipment Custom Details Report (BET930)

### Equipment Custom Details Report (BET930)

1. Define report parameters
2. Click on Run button for report preview

Scope	All Equipment	▼
Custody	All	▼ All Managed Custody Codes
Category	Truck (D)	▼
	Forklift (D)	
	Truck (D)	
	Microcomputer (S)	
	Printer (S)	
<input type="button" value="Run"/>		

Report lists Property number with Asset details and Custom Categories

### Equipment Custom Details (BET930)

Category	Truck	Custody Code	0299	Department	
Property No	Serial No	Building/Room	Value	Description	
1987-10-92595	h3hva04417	/0187	\$17,334.00	truck, cab	
<b>PI/User Name :</b>					Ford/f600
Handtruck : 2-Capri 580, SN12508, \$2,000					
Pallets : 8-Jackson, wood, No s/n, \$1,000					
Rack : 10-Harman 300, \$500.00					

## Printing a Custom Category report of specific property number using Excel

### Item Search

Search has found 1 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
<input checked="" type="checkbox"/> Property#	Building	Select Global Action	
<input checked="" type="checkbox"/> 1987-10-92595	1247	Overstock & Surplus Den Transfer	
truck, cab & chassis only, 2-1/2 ton, 19		Interdepartmental Transfer	
		Disposal	
		Loan	
		Condition Code(s) Update	
		Building/Room Update	
		PI/User Update	
		Custody Code Update	
		Custom Download	

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

### Global Action

1. Provide field selection for custom download
2. Click on Create button to create comma delimited ASCII file
3. Click on Cancel button to go back to the previous screen

Selected items	Source fields	Target fields
19871092595	Condition 2 Disposal Flag Loan Flag Comment Custom Field 4 Custom Field 5 Custom Field 6 Custom Field 7 Custom Field 8 Custom Field 9 Custom Field 10	Property No Serial No Custom Field 1 Custom Field 2 Custom Field 3

Buttons: Add, Add All, Delete, Delete All, Cancel, Create

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.

### Global Action

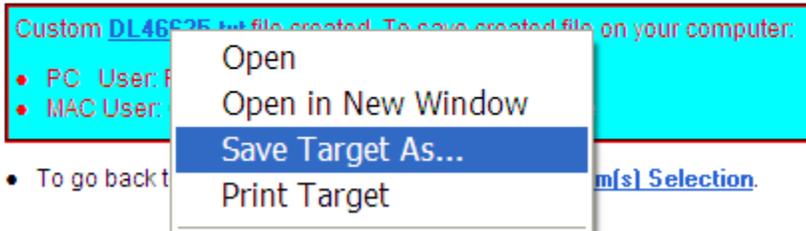
Custom [DL46625.txt](#) file created. To save created file on your computer:

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

PC User: Right Mouse Click on the link

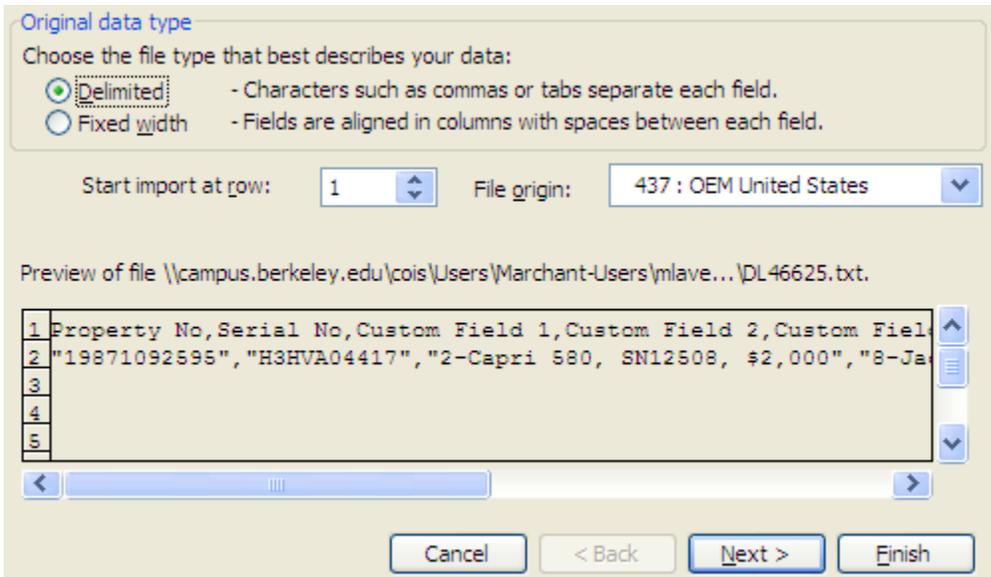
MAC User: Control + Mouse Click on the link

### Global Action

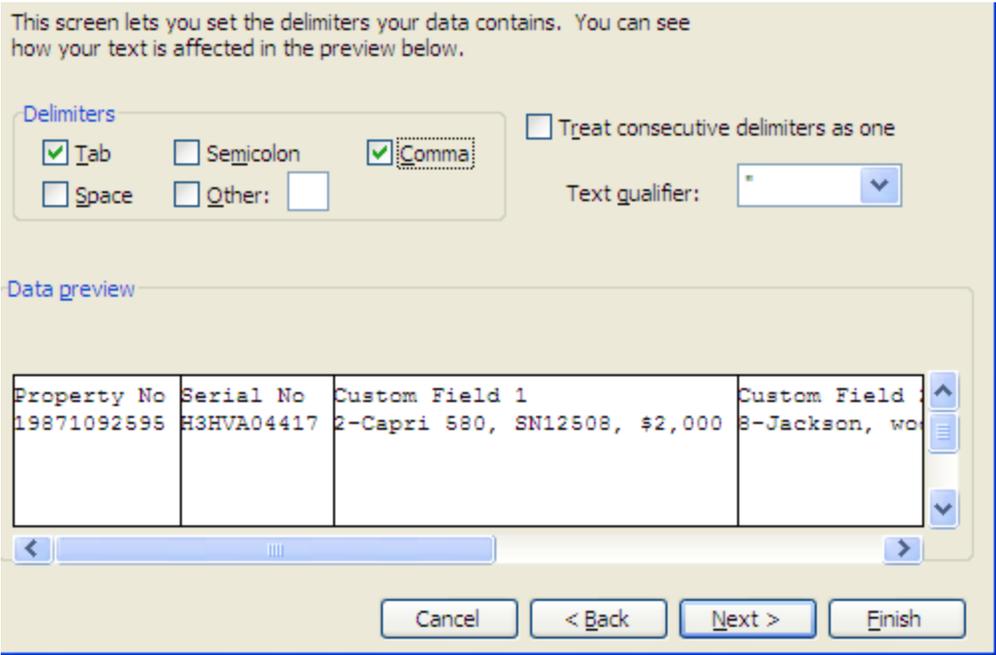


Select Save Target As to save file

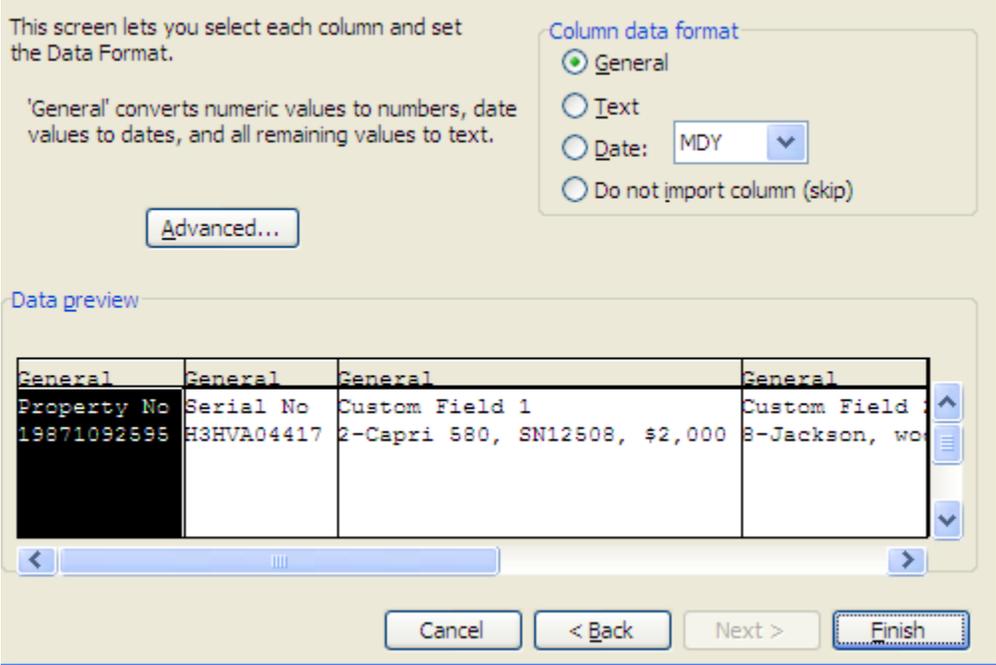
Open Excel and select All Files (\*.\*)



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.

**New Non-Inventorial Item** | [Print](#) | [Contact Us](#) | [Help](#)

Prop No: 2006 -FK-XXXXXX  
 Ref No:  Rec Date: 8 / 28 / 2006  
 Value: \$0.00 Serial No:   
 Custody: 0299 Property management  
 Comp Of:  Building: 1002 Cleary  
 Room No:  PI/User:

COA: Loc: 1 Account:  Fund:  Org:  Prog:  Project:  Flex:

Model No:  Manufact:   
 Description:  Useful Life:   
 Comment:

Reset Save

**Microsoft Internet Explorer**

Please correct following error(s):  
 Item Value format is incorrect  
 Model No is required  
 Manufacturer is required  
 Description is required

OK

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

<input type="button" value="Select All"/>	<input type="button" value="Unselect All"/>	<input type="button" value="Select Global Action"/>	<input type="button" value="GO"/>		
<input checked="" type="checkbox"/>	<b>Property#</b>	<b>Building</b>	<b>Room</b>	<b>Cust</b>	<b>PI/User Name</b>
<input type="checkbox"/>	2004-FK-00002	1247	0218	0299	Laverty
	microcomputer				kclk3ky
<input type="checkbox"/>	2004-FK-00003	1247	0218	0299	Crawford
	microcomputer				kclh3nl
<input type="checkbox"/>	2004-FK-00004	1247	0187a	0299	Anglim
	microcomputer				kclc4bf

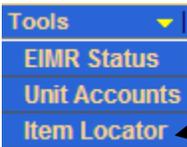
### Transfer and Disposal of Non-Inventorial Items

- 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.

### *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**

#### **Item Locator**

1. Enter Item Property No
2. Click on GO for lookup

Property No

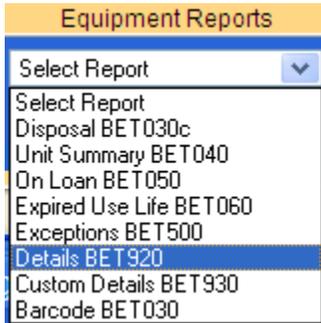
**Information associated with the UC Property Number will be displayed on the screen.**

Property No	1998-10-00852
Status	Active
Description	Truck, cab & chassis
Department	Property Management
Custodian	Kristi Mares
E-Mail	<a href="mailto:kristim@berkeley.edu">kristim@berkeley.edu</a>
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.

### Equipment Details Report (BET920)

1. Define report parameters
2. Click on Run button for report preview

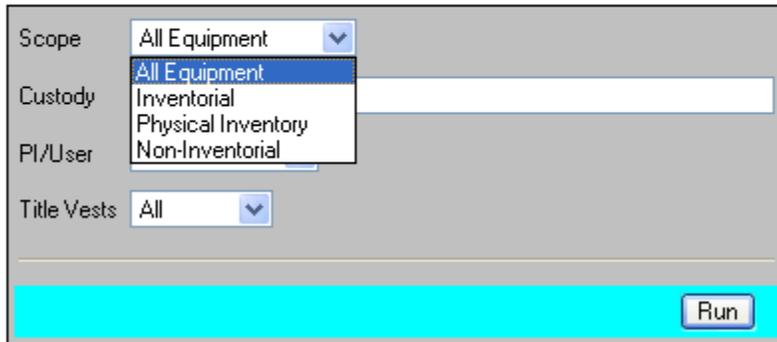


## Define Report Parameters

- **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.

### Equipment Details Report (BET920)

1. Define report parameters
2. Click on Run button for report preview



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



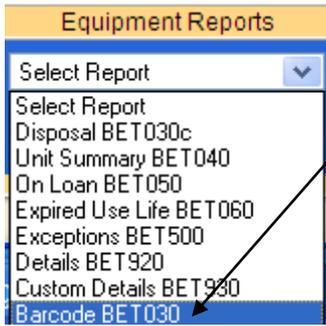
- **All**-report will list all equipment under selected custody code.
- **UC**-report will list equipment where title is vested in UC.
- **Non-UC**-report will list equipment where title is vested in the federal government.
- **Borrowed-report** will list equipment on loan to UC from a non-UC entity.

# Printing Barcode Property Tags

Barcode Tags may be printed for non-inventorial items.

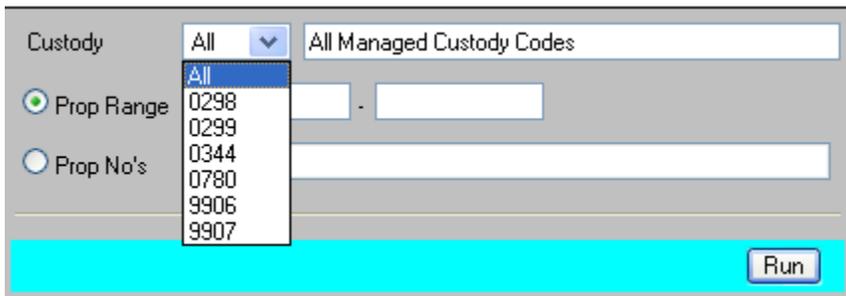
- The standard Avery 2.625 x 1 label may be used for printing adhesive tags.
  - Set printing option **Page Scaling** to **None** if using Avery labels.
  - Be sure that printed Barcode labels are readable by scanner.
- **Note: Equipment Management is responsible for printing barcode tags for inventorial equipment.**

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



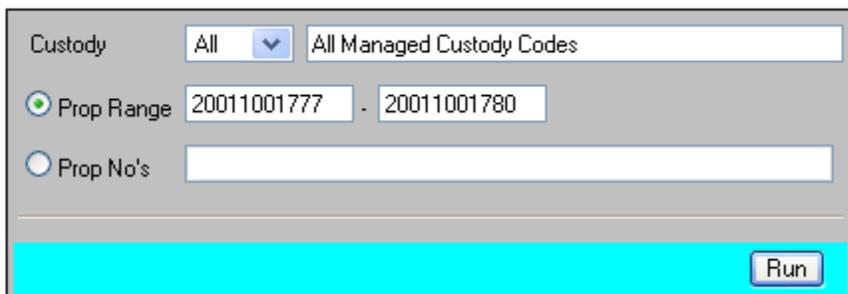
The **Custody Code** default is set at **All Managed Custody Codes**.

Select from pull down menu to select specific code, if you have multiple Custody Codes.

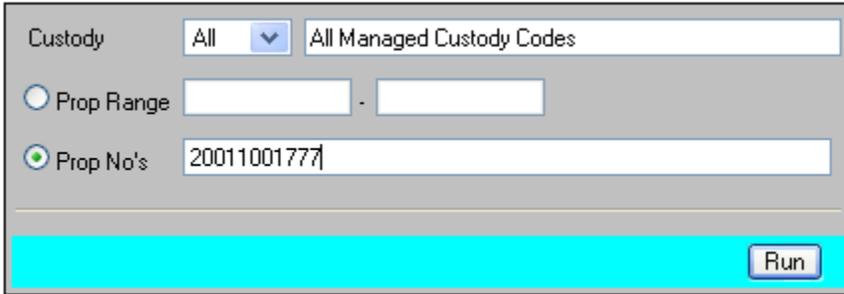


## Equipment Barcode Report (BET030)

1. Define report parameters
2. Click on Run button for report preview



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



Custody: All (dropdown) All Managed Custody Codes

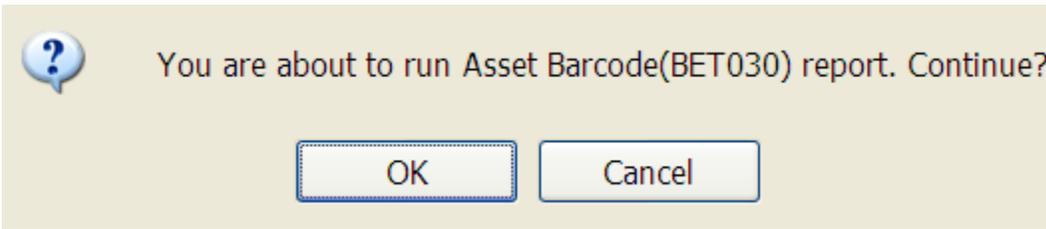
Prop Range

Prop No's: 20011001777

Run

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

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



The barcode tag will print onto the Avery label.

