



# Fall 2023 PACE Meeting PMO - 3000

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October 24, 2023

# Welcome!

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## Agenda

- Welcome New DPAs!
- PMO Staffing Updates
- SPARC Disposals
- Inventory Updates
- FY 23 Metrics
- Audit Reports
- Sunflower Demo
- Capital Cost Transfer Updates
- DPA Roles, form and function
- Upcoming Training Opportunities



# Welcome New DPAs!

## July and October 2023 Classes

- **Shawn Forzetting**
- **Angelica Trejo**
- **Jonathan Clough**
- **Jonathan Clark**
- **Sonam Kumari**
- **Priya Shah**
- **Blake Hennessy Bottorff**
- **Kevin Lo**
- **Yawen Li**
- **Jeremy Lucky**
- **Julianne Spitler**
- **Michelina Pilo**

- **Wendy Fang**
- **Elise Pimenta Estanislau**
- **Judy Womack**
- **Vanessa Ayala**
- **Gabrielle Burns**
- **Ven Su**
- **Frankie Wilson**
- **Mailan Smith**
- **Joshua Gomez**
- **Carol Guthrie**
- **Sara Mulinyawe**



# PMO-1000 FY23 Class Metrics





A photograph of several white paper cutouts of human figures holding hands, arranged in a line. The figures are set against a light green background. A white, torn-edge paper strip separates this image from the black background on the right.

# PMO Staffing Updates

- Welcome!
  - Josh Strahan CPPA, Research Property Administrator
- Rebecca Galvin is no longer at PMO, she has taken a position with UIT
- The Property Programs Manager position is open, job req #100781 and is hybrid-eligible schedule.



# SPARC Device Disposition – Staff Purchases

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*In the event a staff person wishes to purchase their used computer or phone, the following specific steps are needed to accomplish this:*

1. **Device user** obtains a guesstimate of the device's market value (<https://www.gazelle.com/> or <https://ebay.com> are possible sources)
2. **User** contacts **DPA** to request initiation of purchase
3. **DPA** obtains approvals to buy from Department Manager and/or Chair
4. **DPA** contacts **SPS** to obtain price quote (If purchased within one year, Dept. to provide purchasing information. Device will be sold for purchase price or fair market value, whichever is greater)
5. **Devices with cellular service:** Department issues an Order-IT request to submit a Cancel-Order, requesting release of the device to a personal account
6. **User** backs-up and removes iCloud account or Google log-in (unlocks device/phone)
7. **DPA** creates Service Now (SNOW) ticket for device to be sanitized or wiped a. Reference the ticket number in the notes of the SPARC excess request
8. **Once the Order-IT is processed**, it is turned over to Mobile Device Services, who will release financial responsibility to the user. Once the transfer is authorized with the new carrier, the user receives emailed instructions on how to assume liability of the phone number, if desired. Instructions are also provided on how to contact the new carrier directly.
9. **User** performs remote reset/device wipe to ensure all SU is data removed
10. *If price is acceptable to buyer*, **DPA** generates SPARC request for sale
11. **SPS** sends invoice, **buyer** pays invoice
12. **SPS** opens SNOW (help) ticket to release device from MDM & ASM
13. **User** is now in possession of phone





# Furniture Disposal

- Furniture removal should be coordinated with the assistance of Steven Magee, Reutilization Specialist.
- **NO SPARC Excess is needed for furniture disposals**
- Small quantities or small projects (<10 items or a large group of matching chairs):
  - Contact Steven Magee
  - Send photos to him to decide what should go into the ReUse Program
  - Arrange move of furniture to warehouse/PSSI as appropriate via UG2 – a work order is needed through Building Grounds Maintenance (BGM) website or through a 3<sup>rd</sup> Party mover
- Large quantities or projects (2 -3 offices or more)
  - Contact Steven Magee
  - Arrange for a walk-through for evaluation
  - Steven Magee will tag the furniture to go to ReUse
  - Arrange with UG2 or 3<sup>rd</sup> Party movers
  - If using a 3<sup>rd</sup> Party mover, please coordinate with Steven Magee for delivery
  - A PSSI workorder is needed for broken/unacceptable material





## B23 Inventory Update

- B23 Inventory Closed on August 31, 2023
- All resolutions have been entered into SFA
- Overall University result is ~96%
  - The impact of the Covid period is reflected in these inventory results
- Thank you to ALL!



# Lessons Learned

Communication and relationship building is essential

Schedules and accessibility  
effect inventory progress

Record  
Maintenance

->

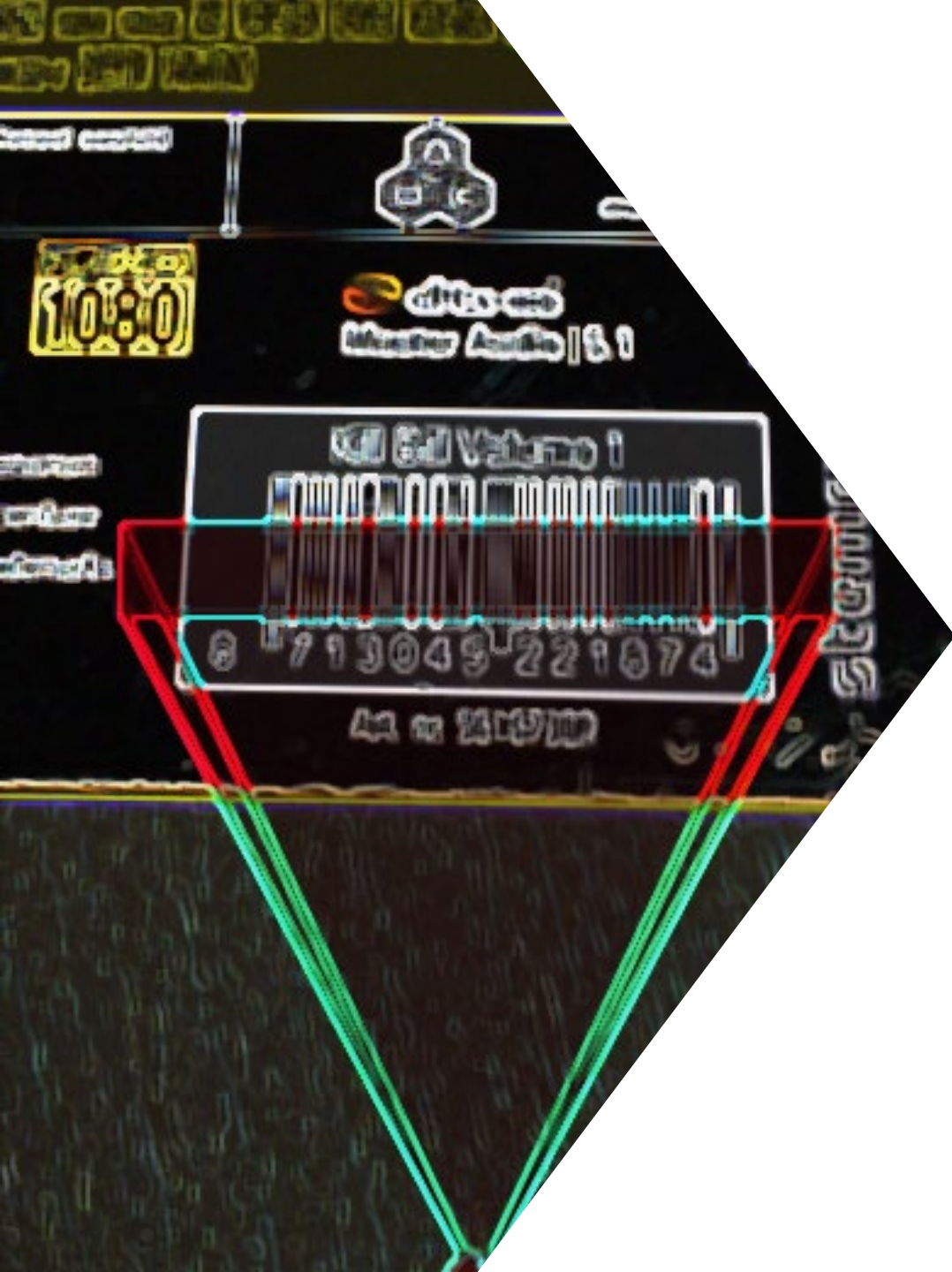
Location,  
Custodian  
updates,  
adding photos

Integrity of  
Affidavit  
verification

Physically  
verifying your  
equipment

Other  
thoughts?

Remember: Inventory Matters !



## B25 Inventory Update

- Began in September 2023
- ***UnMatched purchase order clean-up prior to initial scan***
- ***DPA scheduling***
- Initial scans conducted to date include:
  - University IT
  - Law School
  - Psychology
  - Land, Buildings and Real Estate (LBRE)
- Upcoming initial scans:
  - Stanford Redwood City
  - HEPL/KIPAC
  - Physics
  - Pulse Institute/SUNCAT/SLAC
  - Art and Art History
- Stanford Research Computing Facility expansion





# PMO METRICS

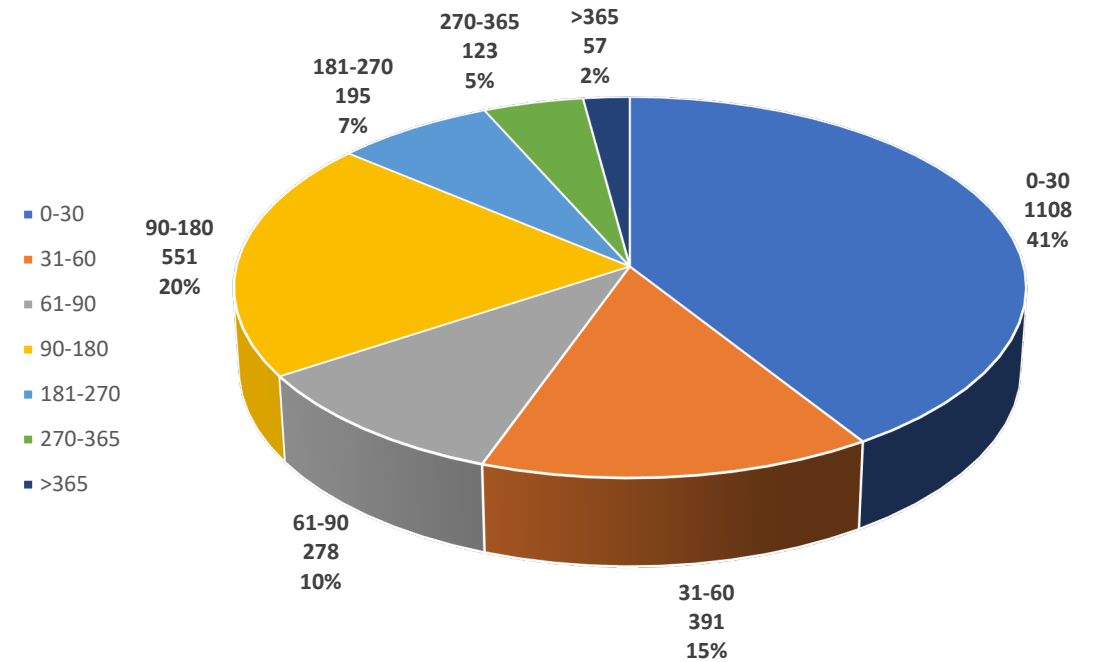
The Year in Review



# Record Creation

- Over 2,700 capital records were created in FY23
- An additional 600 non-capital assets were also recorded

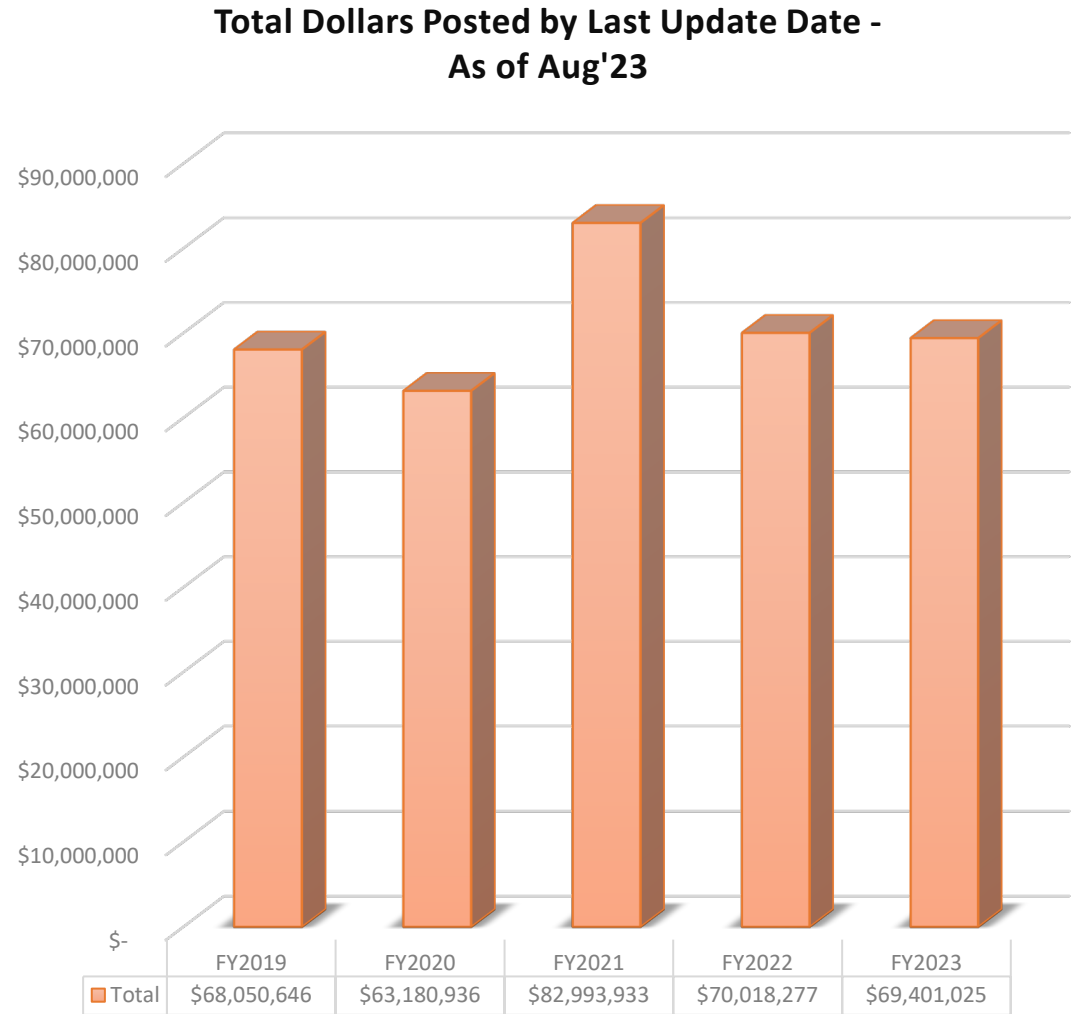
**Record Creation After Receipt, in days**  
Overall average: 86.4





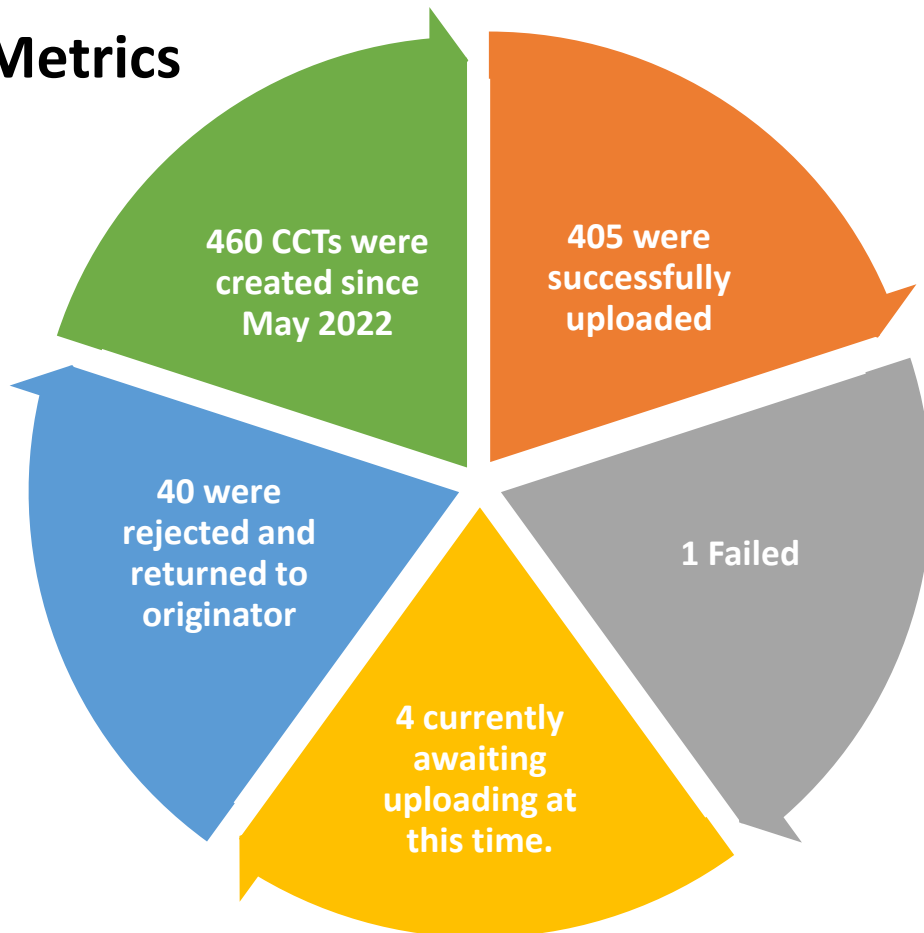
# Reconciled Acquisitions

- Note:
- FY21 spike due to post-pandemic receipts and record creations



# Capital Cost Transfer – Metrics & Updates

## Metrics



## Updates

- The Project Team is updating the CCT application to include validations that will alert originators and approvers if there is a problem with the PTAE, expenditure item date, vendor site/number, and transaction control.
- DPA should advise originators to verify that PTAEs are active/valid, especially for sponsor awards which should be within the start/end dates.
- Enter data in the date field completely (MM/DD/YYYY). Errors can cause a backlog prior to AP INV uploads.



# Capital Requisitions Reviewed

- Total requisitions reviewed 3,712
- Total errors 469
- Error Rate 12.6%

## Error Breakdown

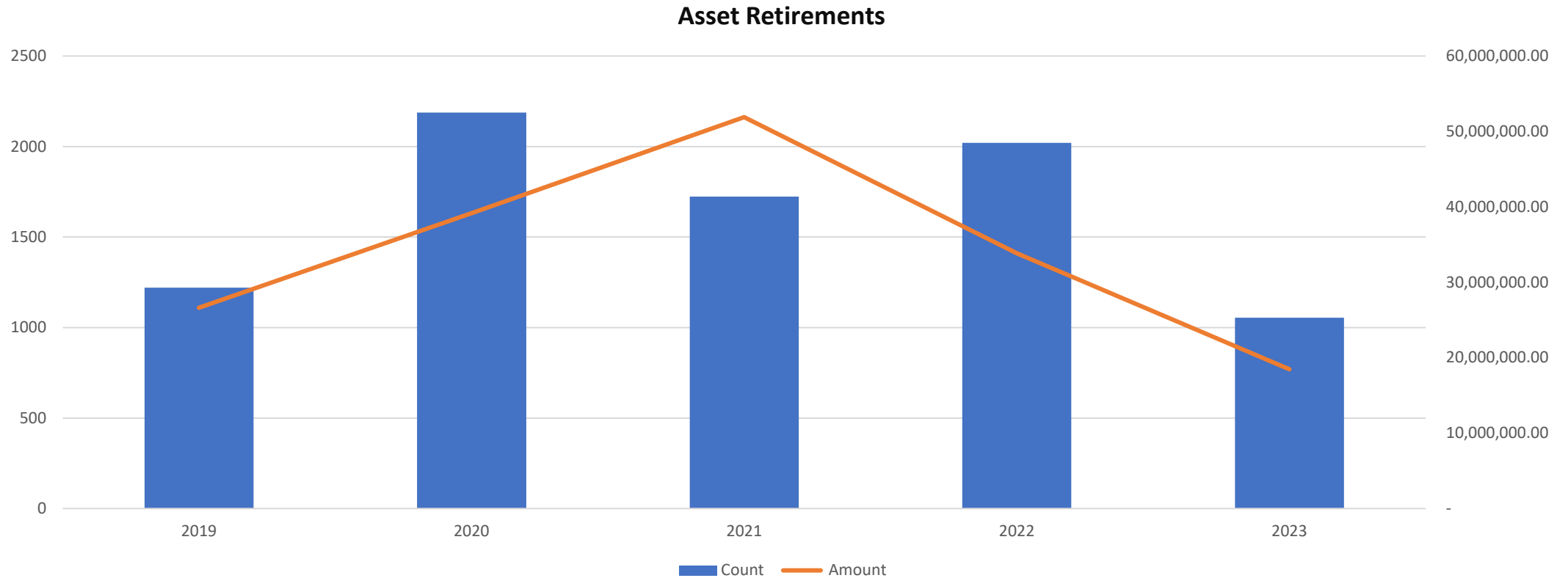
- Wrong ET 200
- No Screening 187
- Award End 30
- Tax on Fed 4
- Other\* 48

- 12.6% is an improvement from FY22 (13.5%)

- \*"Other" primarily consists of sales tax errors, where the tax is erroneously itemized in the requisition, resulting in the tax being taxed (occurred 21 times).

- Also includes Pcard use for capital, req not matching quote, quote missing, etc.

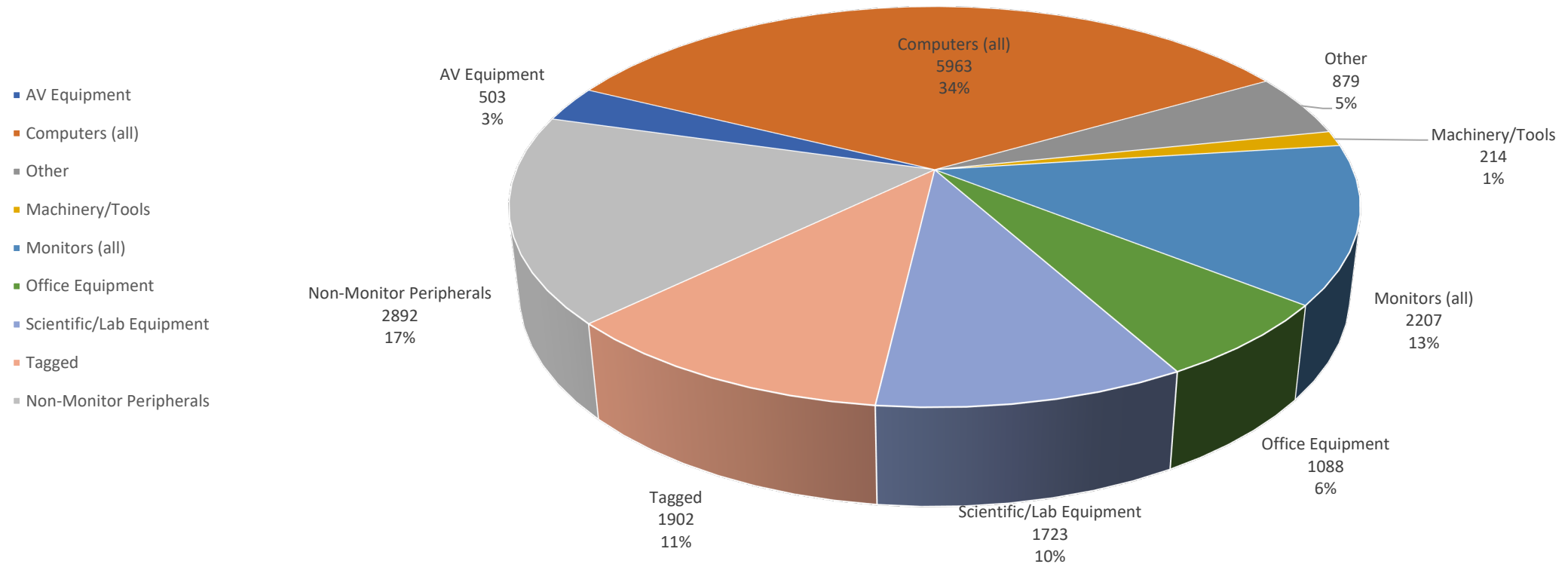
# Retirements Processed (through June 2023)





# Dispositions via SPARC

SPARC Excess Requests FY23 - by category



# Disposal Volume by Quad

## Top Five Quads

07 – Med School\*

08 – GSB

14 – UIT

04 – Engineering\*\*

02 – Engineering

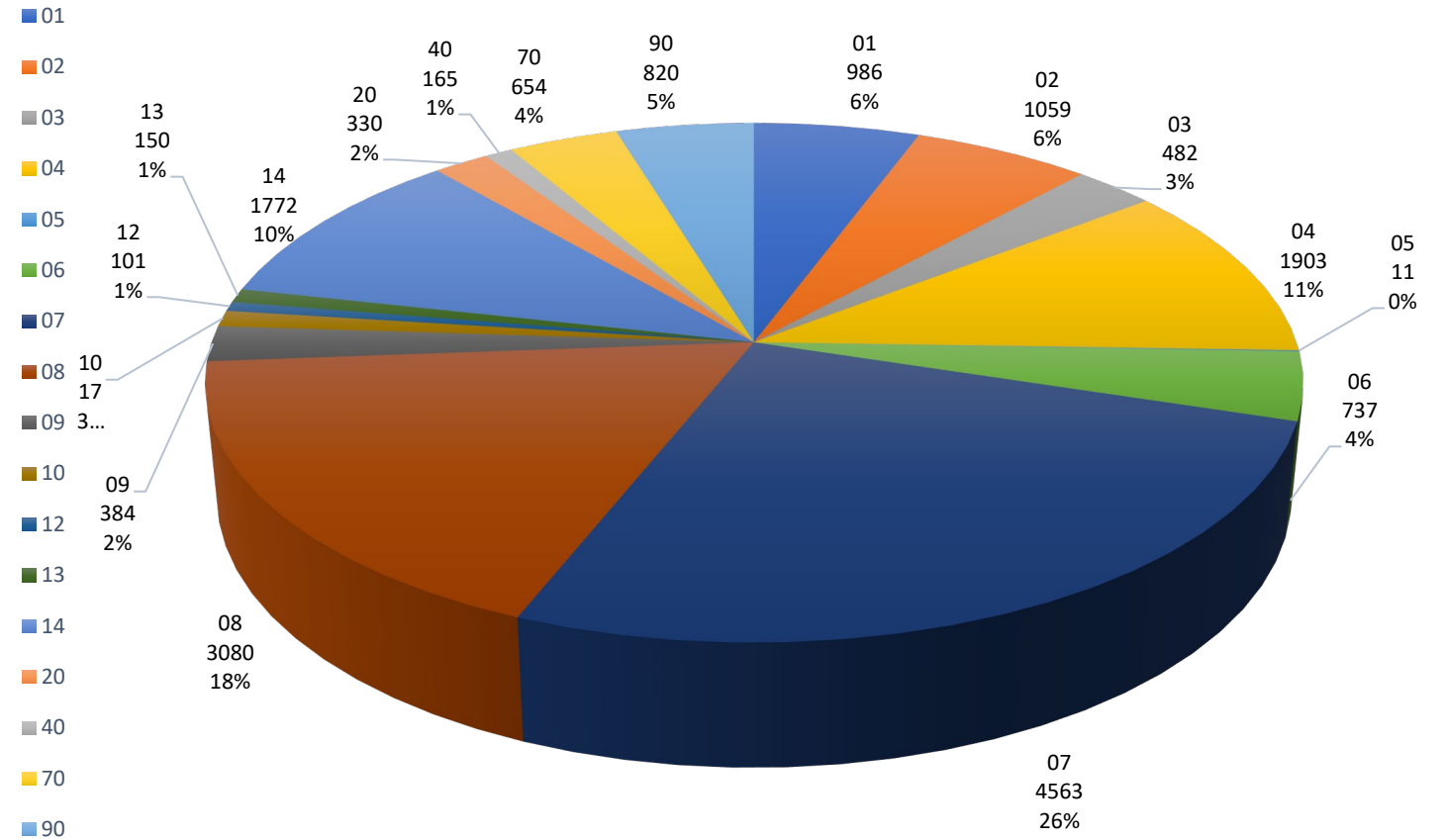
\*Also includes:

Chemistry and Biology

\*\*Also includes:

Physics, HEPL, GLAM

## SPARC Excess Requests FY23 Total Items by Quad





## Reuse Furniture Program

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- Items Reused: \$5,213
- Disposal Cost Avoided: \$317,806
- Replacement Cost Avoided: \$295,714
- Total Savings to Stanford: **\$613,520**
  
- Landfill Diversion: 280,204 lbs. (140.1 tons)
- CO2 Emission Reduction: 445.58 metric tons

**NOTE: Of the 5,213 items diverted, 1,504 were reused on campus, the balance were sold or donated**



# Audit Update

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- Office of Naval Research - Property Control System Analysis (PCSA)
  - Conducted August 2023
  - No findings or observations
- Alameda County and Monterey County
- Upcoming:
  - Uniform Guidance (conducted by PwC)
  - IT Audit
- **Reminder** – Stanford can be subject of an Audit by any Sponsor
  - If you are contacted directly by a sponsor or auditing agency, please reach out to PMO immediately.



# Federal Year End

- October 31, 2023
- PMO Sponsor Compliance Team providing reports to all Federal Sponsors
- Keeping up with UnMatched purchase orders vital to effort

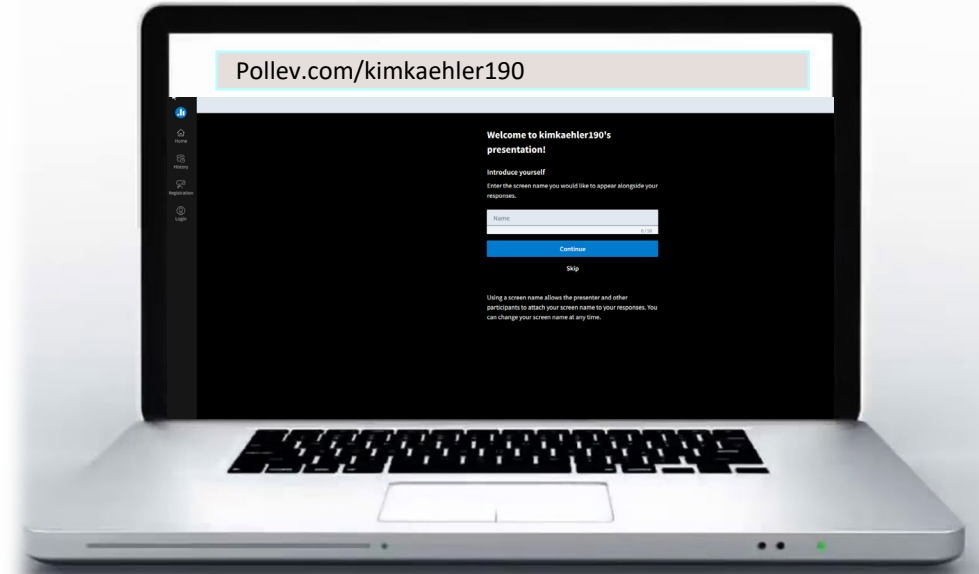
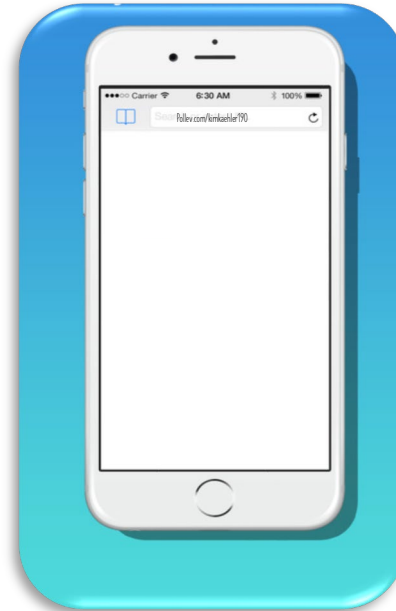
# Calendar Year End

- December 31, 2023
- To be recognized in Tax Year 2023 by the IRS, donations must be physically received by 12/31/2023
- Get the word out to donors

# TIME FOR POLLEV!

Let's hear from you!

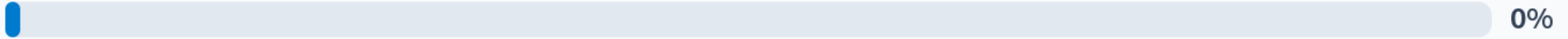
In your Internet Browser  
[Pollev.com/kimkaehler190](http://Pollev.com/kimkaehler190)



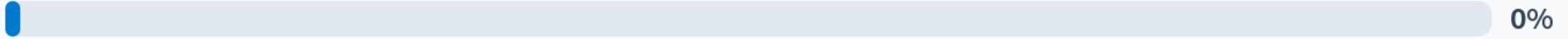


## Select the training topics that would most interest you (select all the apply)

Unmatched tips and tricks



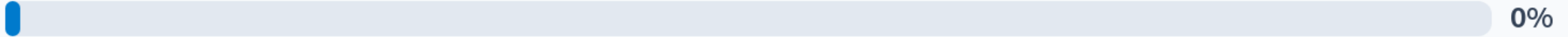
Capital Cost Transfers



Physical Inventory Preparation Training



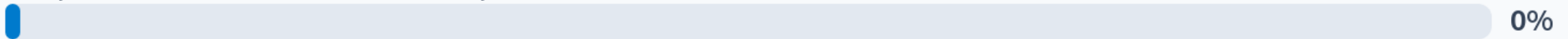
Advanced DPA class (focused on research policy and procedures)



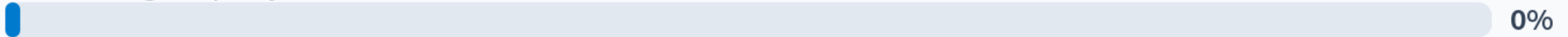
Property Professional Development



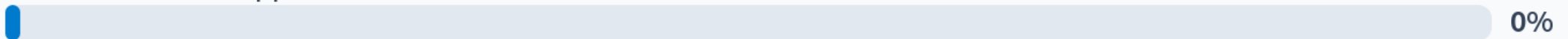
Disposition Process, Roles and Responsibilities



Promoting Property Awareness



DPA Review and Approval Process



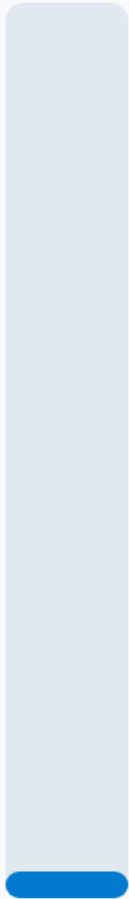
As part of PMO's FY24 Outreach program, we are focused on providing added information and support to our campus community. What are some topics or areas of concern you may like additional information about?

Nobody has responded yet.

Hang tight! Responses are coming in.

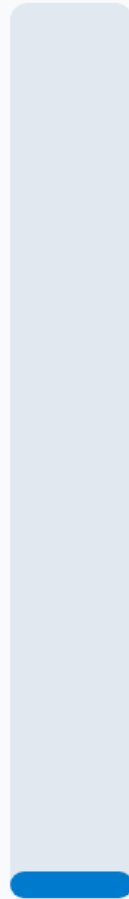
If PMO facilitates an informational session for your organization, would you prefer:

0%



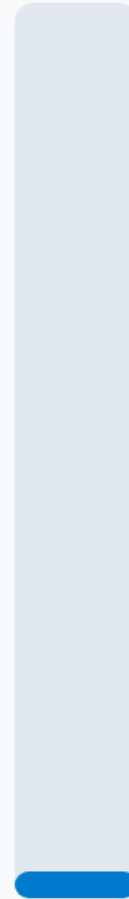
In-Person Meeting

0%



Virtual Meeting

0%



Combination of both



# Creating multiple records from a single purchase order

Sunflower Systems  
September 28, 2023

The first step to create your records is to enter the PO number in the PO Interface Identifier field. Click enter to populate the capital line items.

This PO is showing three pieces of exercise equipment, lines 1, 2, and 6. To start allocating your lines, click the Show List button at the bottom of the form.

Sunflower Enterprise - Production 5.4.2 - 09/28/2023 (KKAehler@OF2UAT)

Exit Agree Contract Mgmt Maintenance Finance Inactive Excess Review IT Components Barcode Configuration Shipments Admin Reports Functions Utility Window Help

Purchase Orders - aspo0010 (Page 1 of 3)

Purchase Orders

Cmpl? NP PO Identifier Po Supplier Organization Pmo Update Flag

63001164 PACIFIC FITNESS PRODUCTS LPRO Y

Comments

PO Item Details

NP Item #	Description	QUANTITY		ALLOCATED			Remaining Balance	
		Ordered	Received	Assets *	Non-Material *	Material *		
<input type="checkbox"/> <input type="checkbox"/> 1	FREEMOTION DUAL CABLE CROSS (WHEEL	1	1	0	0	0	\$6,333.33	
<input type="checkbox"/> <input type="checkbox"/> 2	NUSTEP T5 RECUMBENT STEPPER, STAND	1	1	0	0	0	\$5,102.72	
<input type="checkbox"/> <input type="checkbox"/> 6	SCIFIT PRO 1 UPPER BODY W/ADJ HEAD, CP	1	1	0	0	0	\$4,868.00	
<input type="checkbox"/> <input type="checkbox"/> 7	SHIPPING & HANDLING	1	1	0	0	0	\$2,315.50	
<input type="checkbox"/> <input type="checkbox"/> 8	DELIVERY & SETUP (INSTALLATION)	1	1	0	0	0	\$2,275.00	
<input type="checkbox"/> <input type="checkbox"/>								
<input type="checkbox"/> <input type="checkbox"/>								
<input type="checkbox"/> <input type="checkbox"/>								
<input type="checkbox"/> <input type="checkbox"/>								
<input type="checkbox"/> <input type="checkbox"/>								
<input type="checkbox"/> <input type="checkbox"/>								

<< View >> Show List Change Log





Clicking the box will populate that line item in the allocation box to the right. When you have all line items you need to include on your asset record, click the Allocate button. Double Arrow

This will take you to the record entry form.

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Exit Agree Contract Mgmt Maintenance Finance Inactive Excess Review IT Components Barcode Configuration Shipments Admin Reports Functions Utility Window Help

Purchase Orders - aspo0010 (Page 1 of 3)

Purchase Orders

Cmpl? NP PO Identifier Po Supplier Organization

63001164 PACIFIC FITNESS PRODUCTS LPRO

Comments

PO Item Details

NP Item #	Description	QUANTITY		ALLOCATED		
		Ordered	Received	Assets *	Non-Material *	Material
<input checked="" type="checkbox"/> 1	FREEMOTION DUAL CABLE CROSS (WHEEL	1	1	0	0	
<input type="checkbox"/> 2	NUSTEP T5 RECUMBENT STEPPER, STAND	1	1	0	0	
<input type="checkbox"/> 6	SCIFIT PRO 1 UPPER BODY W/ADJ HEAD, CF	1	1	0	0	
<input type="checkbox"/> 7	SHIPPING & HANDLING	1	1	0	0	
<input type="checkbox"/> 8	DELIVERY & SETUP (INSTALLATION)	1	1	0	0	
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

Selected POs

PO

Item #

Add to list

PO	Item #	Unallocated Quantity
63001164	1	1

Serialized Assets  
 Serialized Materials  
 Non-Serialized Materials

Allocate

<< View >> Show List Change Log

Check box to select a line  
Record: 1/5









Notice that the line item from your created record is still in the allocation box. Click OK to and minimize the allocation box and close the record form to return to the PO Interface.

The screenshot displays the Sunflower Enterprise - Production 5.4.2 - 09/28/2023 (KKAehler@OF2UAT) interface. The main window is titled "Process Inventory Asset PO Interface Records - aspo0020 (Page 2 of 3)". It features a menu bar (Action, Edit, Query, Block, Record, Field, Lookup, Help, Window) and a toolbar. The interface is divided into several sections:

- Assets:** A table with columns "Ok", "SU", "Barcode #", and "\* New Asset". The first row contains "TAG NEEDED" and is highlighted in yellow. Below the table are "Create" and "Assets" buttons, with "1" entered in the "Assets" field. A checkbox "Use next available identifier?" is checked. There are also "Unprocessed Interface Records" buttons for "Assets" (0) and "Asset Value Components" (0).
- Asset Form:** A form with tabs "Asset" and "Additional Details". Fields include "Identifier Type", "Catalog", "Model" (highlighted in yellow), "Serial Number", "Record Last Updated" (09/28/2023), "Last Name", "User Identifier", "Last Name", "Location", and "Do Not Use".
- Selected POs:** A table with columns "PO" and "Item #". The first row contains "63001164" and "1", which is highlighted with a red box.
- Message Dialog:** A small dialog box titled "Forms" with a red speech bubble icon. The message reads: "AS-01390: Transaction complete. Successfully created/updated 1 of 1 asset(s)". An "OK" button is present.

At the bottom of the window, a status bar shows the message: "AS-01390: Transaction complete. Successfully created/updated 1 of 1 asset(s)" and "Record: 1/1".

When you return to the PO Interface. Note that the line 1 box is still checked, and that there is a 1 in the Assets column. This means that you have created an asset with that line. If you double-click on the 1 in the Assets column a pop up will show you the SUID tag number and if the record processed correctly.

To create another record from this PO, click the Show List button again to bring up your Allocation Box.

Sunflower Enterprise - Production 5.4.2 - 09/28/2023 (KKAehler@OF2UAT)

Exit Agree Contract Mgmt Maintenance Finance Inactive Excess Review IT Components Barcode Configuration Shipments Admin Reports Functions Utility Window Help

Purchase Orders - aspo0010 (Page 1 of 3)

Purchase Orders

Cmpl? NP  PO Identifier: 63001164 Po Supplier: PACIFIC FITNESS PRODUCTS Organization: LPRO Pmo Update Flag: Y  
 Comments:

PO Item Details

NP Item #	Description	QUANTITY		ALLOCATED			Remaining Balance
		Ordered	Received	Assets *	Non-Material *	Material *	
<input checked="" type="checkbox"/> 1	FREEMOTION DUAL CABLE CROSS (WHEEL	1	1	1	1	0	\$ .00
<input type="checkbox"/> 2	NUSTEP T5 RECUMBENT STEPPER, STAND	1	1	0	0	0	\$5,102.72
<input type="checkbox"/> 6	SCIFIT PRO 1 UPPER BODY W/ADJ HEAD, CF	1	1	0	0	0	\$4,868.00
<input type="checkbox"/> 7	SHIPPING & HANDLING	1	1	0	0	0	\$2,315.50
<input type="checkbox"/> 8	DELIVERY & SETUP (INSTALLATION)	1	1	0	0	0	\$2,275.00
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

<< View >> Show List Change Log

PO Identifier: Record: 1/1

The Allocation Box will pop-up and it is very important to remove the selected line item by unclicking the checked box or use the double back arrows to clear the Box.

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Exit Agree Contract Mgmt Maintenance Finance Inactive Excess Review IT Components Barcode Configuration Shipments Admin Reports Functions Utility Window Help

Purchase Orders - aspo0010 (Page 1 of 3)

Purchase Orders

Cmpl? NP PO Identifier Po Supplier Organization

63001164 PACIFIC FITNESS PRODUCTS LPRO

Comments

PO Item Details

NP Item #	Description	QUANTITY		ALLOCATED		
		Ordered	Received	Assets *	Non-Material *	Material
<input checked="" type="checkbox"/> 1	FREEMOTION DUAL CABLE CROSS (WHEEL	1	1	1	1	
<input type="checkbox"/> 2	NUSTEP T5 RECUMBENT STEPPER, STAND	1	1	0	0	
<input type="checkbox"/> 6	SCIFIT PRO 1 UPPER BODY W/ADJ HEAD, Cf	1	1	0	0	
<input type="checkbox"/> 7	SHIPPING & HANDLING	1	1	0	0	
<input type="checkbox"/> 8	DELIVERY & SETUP (INSTALLATION)	1	1	0	0	
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

Selected POs

PO

Item #

Add to list

PO	Item #	Unallocated Quantity
63001164	1	0

Serialized Assets

Serialized Materials

Non-Serialized Materials

Allocate

<< View >> Show List Change Log

PO Identifier

Record: 1/1

Sunflower Enterprise - Production 5.4.2 - 09/28/2023 (KKAehler@OF2UAT)

Purchase Orders - aspo0010 (Page 1 of 3)

Purchase Orders

Cmpl? NP PO Identifier Po Supplier Organization  
  63001164 PACIFIC FITNESS PRODUCTS LPRO

Comments

Selected POs

PO Item # Unallocated Quantity

PO

Quantity Allocation Table:

NP Item #	Description	QUANTITY		ALLOCATED		
		Ordered	Received	Assets *	Non-Material *	Material
<input type="checkbox"/> 1	FREEMOTION DUAL CABLE CROSS (WHEEL	1	1	1	1	1
<input type="checkbox"/> 2	NUSTEP T5 RECUMBENT STEPPER, STAND	1	1	0	0	0
<input type="checkbox"/> 6	SCIFIT PRO 1 UPPER BODY W/ADJ HEAD, C	1	1	0	0	0
<input type="checkbox"/> 7	SHIPPING & HANDLING	1	1	0	0	0
<input type="checkbox"/> 8	DELIVERY & SETUP (INSTALLATION)	1	1	0	0	0

Serialized Assets  
 Serialized Materials  
 Non-Serialized Materials

Allocate

Record: 1/5



Sunflower Enterprise - Production 5.4.2 - 09/28/2023 (KKAehler@OF2UAT)

Purchase Orders - aspo0010 (Page 1 of 3)

Purchase Orders

Cmpl? NP PO Identifier Po Supplier Organization  
  63001164 PACIFIC FITNESS PRODUCTS LPRO

Comments

Selected POs

PO Item # Unallocated Quantity

PO 63001164

Quantity Allocation Table:

NP Item #	Description	QUANTITY		ALLOCATED		
		Ordered	Received	Assets *	Non-Material *	Material
<input type="checkbox"/> 1	FREEMOTION DUAL CABLE CROSS (WHEEL	1	1	1	1	1
<input checked="" type="checkbox"/> 2	NUSTEP T5 RECUMBENT STEPPER, STAND	1	1	0	0	0
<input type="checkbox"/> 6	SCIFIT PRO 1 UPPER BODY W/ADJ HEAD, C	1	1	0	0	0
<input type="checkbox"/> 7	SHIPPING & HANDLING	1	1	0	0	0
<input type="checkbox"/> 8	DELIVERY & SETUP (INSTALLATION)	1	1	0	0	0

Serialized Assets  
 Serialized Materials  
 Non-Serialized Materials

Allocate

Record: 2/5

With an empty Allocation Box, select another line item and continue the record creation(s).





Sunflower Enterprise - Production 5.4.2 - 09/28/2023 (KKAehler@OF2UAT)

Exit Agree Contract Mgmt Maintenance Finance Inactive Excess Review IT Components Barcode Configuration Shipments Admin Reports Functions Utility Window Help

Purchase Orders - aspo0010 (Page 1 of 3)

Purchase Orders

Cmpl? NP PO Identifier Po Supplier Organization

63053730 OLYMPUS CONTROLS QCSS

Comments

PO Item Details

NP Item #	Description	Q U A N T I T Y		A L L O C A T E D		
		Ordered	Received	Assets *	Non-Material *	Material *
<input checked="" type="checkbox"/> <input type="checkbox"/> 1	GX8-A653SSTD, TABLE TOP, STRAIGHT, BAC	5	5	0	0	0
<input type="checkbox"/> <input type="checkbox"/> 2	RC700D CONTROLLER FOR GX8 SERIES	1	1	0	0	0
<input checked="" type="checkbox"/> <input type="checkbox"/> 3	15 METER POWER AND SIGNAL CABLE, S-S	5	5	0	0	0
<input checked="" type="checkbox"/> <input type="checkbox"/> 4	RC700A WITH FORCE SENSING	5	5	0	0	0
<input type="checkbox"/> <input type="checkbox"/>						
<input type="checkbox"/> <input type="checkbox"/>						
<input type="checkbox"/> <input type="checkbox"/>						
<input type="checkbox"/> <input type="checkbox"/>						
<input type="checkbox"/> <input type="checkbox"/>						
<input type="checkbox"/> <input type="checkbox"/>						
<input type="checkbox"/> <input type="checkbox"/>						

<< View >> Show List Change Log

Check box to select a line  
Record: 4/4

Selected POs

PO

Item #

Add to list

PO	Item #	Unallocated Quantity
63053730	1	5
63053730	3	5
63053730	4	5

Serialized Assets  
Serialized Materials  
Non-Serialized Materials

Allocate

Here lines 1, 3 and 4 have been selected for the first record. Click Allocate and complete the record.

Sunflower Enterprise - Production 5.4.2 - 09/28/2023 (KKAehler@OF2UAT)

Process Inventory Asset PO Interface Records - aspo0020 (Page 2 of 3)

Assets

Ok SU Barcode # \* New Asset

TAG NEEDED

Asset Additional Details

Identifier Type

Catalog Model

Serial Number

Record Last Updated 09/28/2023

Actn Forms

Asset

Bus

D

Custodia

Last Name

User Identifier

Last Name First

Location

Do Not Use

Message

Selected POs

View Purchase Order

View PO Item Details

PO	Item #
63053730	1
63053730	3
63053730	4

AS-01390: Transaction complete. Successfully created/updated 1 of 1 asset(s)

OK

Create 4 Assets

Use next available identifier?

Unprocessed Interface Records

0 Assets

0 Asset Value Components

AS-01390: Transaction complete. Successfully created/updated 1 of 1 asset(s)

Record: 1/1



Sunflower Enterprise - Production 5.4.2 - 09/28/2023 (KKAehler@OF2UAT)

Purchase Orders - aspo0010 (Page 1 of 3)

Purchase Orders

Cmp? NP PO Identifier Po Supplier Organization

63053730 OLYMPUS CONTROLS QCSS

Comments

Selected POs

PO

Item #

Add to list

PO Item Details

NP Item #	Description	QUANTITY		ALLOCATED			Unallocated Quantity
		Ordered	Received	Assets *	Non-Material *	Mat	
<input checked="" type="checkbox"/> 1	GX8-A653SSTD, TABLE TOP, STRAIGHT, BAC	5	5	1	1		4
<input type="checkbox"/> 2	RC700D CONTROLLER FOR GX8 SERIES	1	1	0	0		4
<input checked="" type="checkbox"/> 3	15 METER POWER AND SIGNAL CABLE, S-S	5	5	1	1		
<input checked="" type="checkbox"/> 4	RC700A WITH FORCE SENSING	5	5	1	1		4

Serialized Assets

Serialized Materials

Non-Serialized Materials

Allocate

<< View >> Show List Change Log

PO Identifier

Record: 1/1



Here lines 1, 3 and 4 will remain in the Allocation Box, click OK and return to the PO interface. You have the same 3 lines allocated and you can just click Allocate and complete the next record because the line items on the records are the same. Continue until you have created all 5 records.

# STANFORD UNIVERSITY

Rundate: 10/19/2023  
Last Closed Period: SEP-2023

Comprehensive Dashboard

User ID: ibachar  
Database: DW2\_PRD  
OF1PRD

SUID Tag Number	--Select Value-- ▼	Steward/Parent Org	--Select Value-- ▼	Quad Number	--Select Value-- ▼	Accountable SPO Number	--Select Value-- ▼
Description	--Select Value-- ▼	Dept Code	--Select Value-- ▼	Bldg-Floor	--Select Value-- ▼	Agreement Number	--Select Value-- ▼
Untaggable Indicator	--Select Value-- ▼	Dept Name	--Select Value-- ▼	Room Number	--Select Value-- ▼	Acquisition Method	--Select Value-- ▼
Asset ID Number	--Select Value-- ▼	Manufacturer Name	--Select Value-- ▼	Parcel Number	--Select Value-- ▼	User Name	--Select Value-- ▼
Project Number	--Select Value-- ▼	Model Number	--Select Value-- ▼	Street Address	--Select Value-- ▼	Custodian Name	--Select Value-- ▼
Task Number	--Select Value-- ▼	Serial Number	--Select Value-- ▼			DPA Name	--Select Value-- ▼
Award Number	--Select Value-- ▼	Sponsor Tag Number	--Select Value-- ▼			Fleet ID Number	--Select Value-- ▼
PO/Acq Doc Identifier	--Select Value-- ▼	Owner	--Select Value-- ▼			Acquisition Date	Between <input type="text"/>  - <input type="text"/> 
						Asset Life Status:	--Select Value-- ▼

Apply Reset ▼

Please select Asset Life Status before running the Report.  
You may enter more Parameter Values to narrow the search.



## STANFORD UNIVERSITY

Rundate: 10/23/2023  
Last Closed Period: SEP-2023

Comprehensive Dashboard

User ID: kkaehler  
Database: DW2\_PRD  
OF1PRD

SUID Tag Number	--Select Value--	Steward/Parent Org	--Select Value--	Quad Number	--Select Value--	Accountable SPO Number	--Select Value--
Description	--Select Value--	Dept Code	WAZB	Bldg-Floor	--Select Value--	Agreement Number	--Select Value--
Untaggable Indicator	--Select Value--	Dept Name	--Select Value--	Room Number	--Select Value--	Acquisition Method	--Select Value--
Asset ID Number	--Select Value--	Manufacturer Name	--Select Value--	Parcel Number	--Select Value--	User Name	--Select Value--
Project Number	--Select Value--	Model Number	--Select Value--	Street Address	--Select Value--	Custodian Name	--Select Value--
Task Number	--Select Value--	Serial Number	--Select Value--			DPA Name	--Select Value--
Award Number	--Select Value--	Sponsor Tag Number	--Select Value--			Fleet ID Number	--Select Value--
PO/Acq Doc Identifier	--Select Value--	Owner	--Select Value--			Acquisition Date	Between 09/01/2020 10/23/2023
						Asset Life Status:	Active

Please select Asset Life Status before running the Report.  
You may enter more Parameter Values to narrow the search.



# Report Data Arrangement

- from right to left

SUID Tag Number	Description	Manufacturer Name	Model Number	Serial Number	Year of Mfr	Owner	Org Code	Dept Name	DPA	Custodian	User	Service Center Indicator	IDC Flag	Building Name	Quad	Building-Floor	Room	Street Address	Parcel Number	
7246838	PROFILER	NANOSTRING TECHNOLOGIES	NCT-SPRINT DEMO	1512P0058	2016	STANFORD UNIVERSITY	WAZB	WAZB-Genetics - Genome Center	Bajorek, Eva S.	Coller, John A.	Unknown	Y	UNALLOW	590-00-CENTER FOR CLINICAL SCIENCES RESRCH	07 - MEDICAL CENTER	590-00	0120	269 CAMPUS DR STANFORD	142-05-045	
7246838 Total																				

## Asset Description

- SUID, Description, Manufacturer, Model Number, Serial Number, Owner, Org, DPA, Custodian, Service Center/IDC flag, Location

Acquisition Date	Acquisition Method	PO/Acq Doc Identifier	SFA Acq Amount	Net Book Value	FA Distribution Amount	Percent Breakdown	Project	Task	Award	Expenditure Type Code	Award End Date	Fixed Asset ID Number	Fixed Asset Invoice Flag Indicator	SPO Number	Accountable SPO Number	Asset Agreement Number	PMO Audit Code	Sponsor Tag Number
9/30/2022	PURCHASE	62959256	0.00	0.00	42,075.00	100.00%	1126741	800	XIABC	53115	8/31/2035	1870981	Y	NA				
			42,075.00	33,660.00	0.00					NA		1870981	N	NA				
			42,075.00	33,660.00	42,075.00													

## Financial Information

- Acq. Date, Method, PO, Acq. Amount, NBV, FA Distribution, %, PTA, ET, Award End Date, Fixed Asset ID, Invoice Flag, SPO, Agreement, PMO Audit and Sponsor Tag Number

Fleet ID Number	Last Inventory Resolution	Last Inventory Date	Untaggable Indicator	PMO Due Date	Status	Condition	Final Event Date	Final Event Method	Final Event Method Description	Fixed Asset Retire Status	FA Retirement Date	Cost at Retirement Amount	Surplus Property Sales Invoice Number	Attachments Code
	BARCODE SCAN	3/15/2023	TAGGABLE	5/15/2018	IN SERVICE	GOOD CONDITION				-		0.00		C,A
	BARCODE SCAN	3/15/2023	TAGGABLE	5/15/2018	IN SERVICE	GOOD CONDITION				-				C,A
												0.00		

## Asset History

- Fleet ID, Last Inventory Resolution/Date, Untaggable indicator, PMO Due Date, Status, Condition, Final Event Information and Retirement, Attachment Codes

# Equipment Fabrications

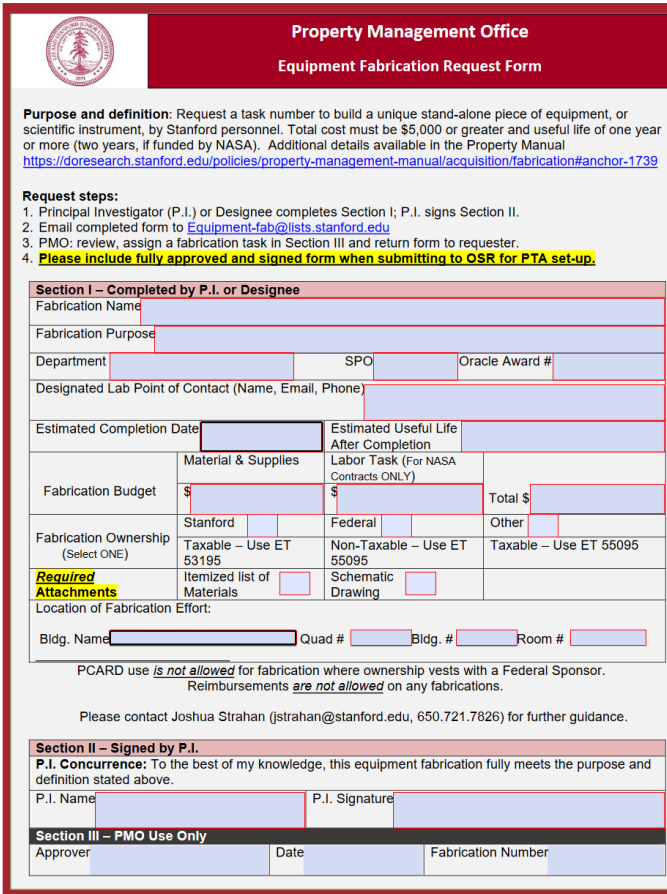
- Request and Completion forms available on the PMO website

- <https://ora.stanford.edu/resources/property-management-manual/51-property-management-office-forms-and-documents>

- Reminder to use the current documents and not old ones with incorrect information

- We are currently down to our final 30 numbers in the 4000 range

- Moving to 5 –digits once we assign fabrication #4999



**Property Management Office**  
Equipment Fabrication Request Form

**Purpose and definition:** Request a task number to build a unique stand-alone piece of equipment, or scientific instrument, by Stanford personnel. Total cost must be \$5,000 or greater and useful life of one year or more (two years, if funded by NASA). Additional details available in the Property Manual <https://doresearch.stanford.edu/policies/property-management-manual/acquisition/fabrication#anchor-1739>

**Request steps:**

1. Principal Investigator (P.I.) or Designee completes Section I; P.I. signs Section II.
2. Email completed form to [Equipment-fab@lists.stanford.edu](mailto:Equipment-fab@lists.stanford.edu)
3. PMO: review, assign a fabrication task in Section III and return form to requester.
4. **Please include fully approved and signed form when submitting to OSR for PTA set-up.**

**Section I – Completed by P.I. or Designee**

Fabrication Name: \_\_\_\_\_

Fabrication Purpose: \_\_\_\_\_

Department: \_\_\_\_\_ SPO: \_\_\_\_\_ Oracle Award #: \_\_\_\_\_

Designated Lab Point of Contact (Name, Email, Phone): \_\_\_\_\_

Estimated Completion Date: \_\_\_\_\_ Estimated Useful Life After Completion: \_\_\_\_\_

Fabrication Budget	Material & Supplies		Labor Task (For NASA Contracts ONLY)		Total \$
	\$		\$		
Fabrication Ownership (Select ONE)	Stanford <input type="checkbox"/>	Federal <input type="checkbox"/>	Other <input type="checkbox"/>		
<b>Required Attachments</b>	Taxable – Use ET 53195 <input type="checkbox"/>	Non-Taxable – Use ET 55095 <input type="checkbox"/>	Taxable – Use ET 55095 <input type="checkbox"/>		
	Itemized list of Materials <input type="checkbox"/>	Schematic Drawing <input type="checkbox"/>			

Location of Fabrication Effort:

Bldg. Name: \_\_\_\_\_ Quad #: \_\_\_\_\_ Bldg. #: \_\_\_\_\_ Room #: \_\_\_\_\_

PCARD use is not allowed for fabrication where ownership vests with a Federal Sponsor. Reimbursements are not allowed on any fabrications.

Please contact Joshua Strahan ([jstrahan@stanford.edu](mailto:jstrahan@stanford.edu), 650.721.7826) for further guidance.

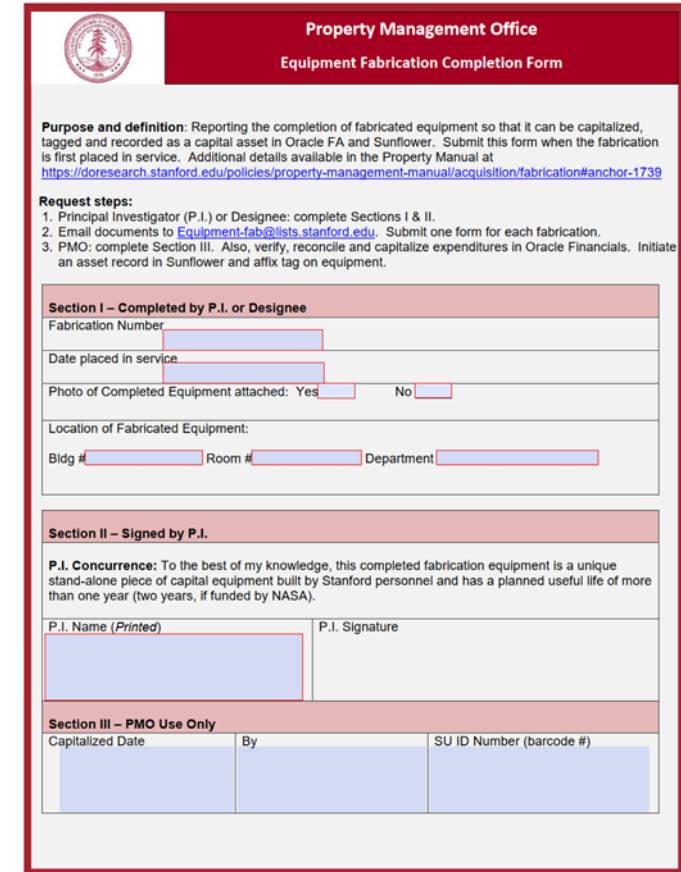
**Section II – Signed by P.I.**

**P.I. Concurrence:** To the best of my knowledge, this equipment fabrication fully meets the purpose and definition stated above.

P.I. Name: \_\_\_\_\_ P.I. Signature: \_\_\_\_\_

**Section III – PMO Use Only**

Approver	Date	Fabrication Number
_____	_____	_____



**Property Management Office**  
Equipment Fabrication Completion Form

**Purpose and definition:** Reporting the completion of fabricated equipment so that it can be capitalized, tagged and recorded as a capital asset in Oracle FA and Sunflower. Submit this form when the fabrication is first placed in service. Additional details available in the Property Manual at <https://doresearch.stanford.edu/policies/property-management-manual/acquisition/fabrication#anchor-1739>

**Request steps:**

1. Principal Investigator (P.I.) or Designee: complete Sections I & II.
2. Email documents to [Equipment-fab@lists.stanford.edu](mailto:Equipment-fab@lists.stanford.edu). Submit one form for each fabrication.
3. PMO: complete Section III. Also, verify, reconcile and capitalize expenditures in Oracle Financials. Initiate an asset record in Sunflower and affix tag on equipment.

**Section I – Completed by P.I. or Designee**

Fabrication Number: \_\_\_\_\_

Date placed in service: \_\_\_\_\_

Photo of Completed Equipment attached: Yes  No

Location of Fabricated Equipment:

Bldg #: \_\_\_\_\_ Room #: \_\_\_\_\_ Department: \_\_\_\_\_

**Section II – Signed by P.I.**

**P.I. Concurrence:** To the best of my knowledge, this completed fabrication equipment is a unique stand-alone piece of capital equipment built by Stanford personnel and has a planned useful life of more than one year (two years, if funded by NASA).

P.I. Name (Printed): \_\_\_\_\_ P.I. Signature: \_\_\_\_\_

**Section III – PMO Use Only**

Capitalized Date	By	SU ID Number (barcode #)
_____	_____	_____



# These roles are unique in form and function:

## Re DPA Screening Authority

- Role related to requisition review
- Responsibility of the DPA routed to review, "screen", approve
- Oracle role provides flexibility for an alternate DPA to be selected for review/approval to expedite approval if the official DPA is unavailable
- Caveat -- DPA approving will be the one routed for Unmatched resolution

## DPA Directory

- SPARC application
- Designation imported from Sunflower: Primary and Back-up DPA
- Unrelated to Oracle DPA Screening role

## Sunflower "Steward" or DPA

- Grants editing capability for asset records within specific department code(s)
- Defines who SPARC Excess Request for capital equipment (or other tagged equipment) routes for approval
- Assigned by PMO upon completion of training



# Upcoming Training Opportunities



## 1:1 PPM

Please don't hesitate to contact your PPM with your questions or training needs



## PMO-1000

DPA Certification class – in person, one day class - SRWC February 21, 2024.



## PMO-5010

Self-paced introduction to creating a Capital Cost Transfer in SPARC.



## PMO-2000

DPA review and refresher class, single session, via zoom January 23, 2024.



welcome to the

## National Property Management Association

NPMA is a non-profit membership association for professionals who are responsible for the effective and efficient management of equipment, materials, and other moveable and durable assets for their organization.

LEARN MORE

# NPMA CLASSES and SEMINARS

**Wednesday, November 1, 2023**

**[Autumn Virtual Seminar](#)**

11/1/2023 » 11/2/2023

**Monday, November 6, 2023**

**[100 Worst Mistakes in Property Management Online November 2023](#)**

11/6/2023 » 11/8/2023

**Tuesday, November 28, 2023**

**[CPPS Certification Review Online](#)**

11/28/2023 » 12/1/2023

**Monday, December 4, 2023**

**[CPPA Certification Review Online](#)**

12/4/2023 » 12/7/2023

**Tuesday, January 30, 2024**

**[Navigating, Reviewing and Understanding Contractual Terms & Conditions Related to Property Online](#)**

1/30/2024

**Tuesday, February 6, 2024**

**[CPPS Certification Review Online](#)**

2/6/2024 » 2/9/2024

**Tuesday, March 12, 2024**

**[CPPA Certification Review Online](#)**

3/12/2024 » 3/15/2024





# Thank You for Attending!

Next PACE Meeting - April of 2024

PMO-3000 in STARS