



# Spring 2024 PACE Meeting PMO - 3000

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April 17, 2024

# Welcome!

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## Agenda

- Welcome New DPAs!
- PMO Staffing Updates
- Surplus Property Sales Relocation
- Unmatched Awareness
- Leases
- Business Affairs EUHL Initiative
- Data Quality Assurance – Serial Numbers
- NEW – Comprehensive Report in BI
- Transfers
- Audit Update
- Fabrication Number Update
- B25 Inventory Update
- Reminders
- DPA Spreading Awareness



Stanford University  
Property Management Office

# Welcome New DPAs!

## 2024 February Class – first in person DPA Certification in four years!

- Blake Koach-Gates
- Blanca Tezanos
- Jennifer Bijan
- John Lee
- Julianna Trinitade
- Leia Grefalda
- Lynn Floyd
- Marc Blackwood
- Marian Moreno-Lane
- Michelle Blanco
- Trinh Luu
- Victoria Hunter
- Victoria Lewis



# PMO Staffing Updates

- Welcome!
  - Miguel Angel Figueroa – new PPM
  - One additional PMO headcount – Approved for FY 24!
  - Jimmy Baca will be on leave beginning in May



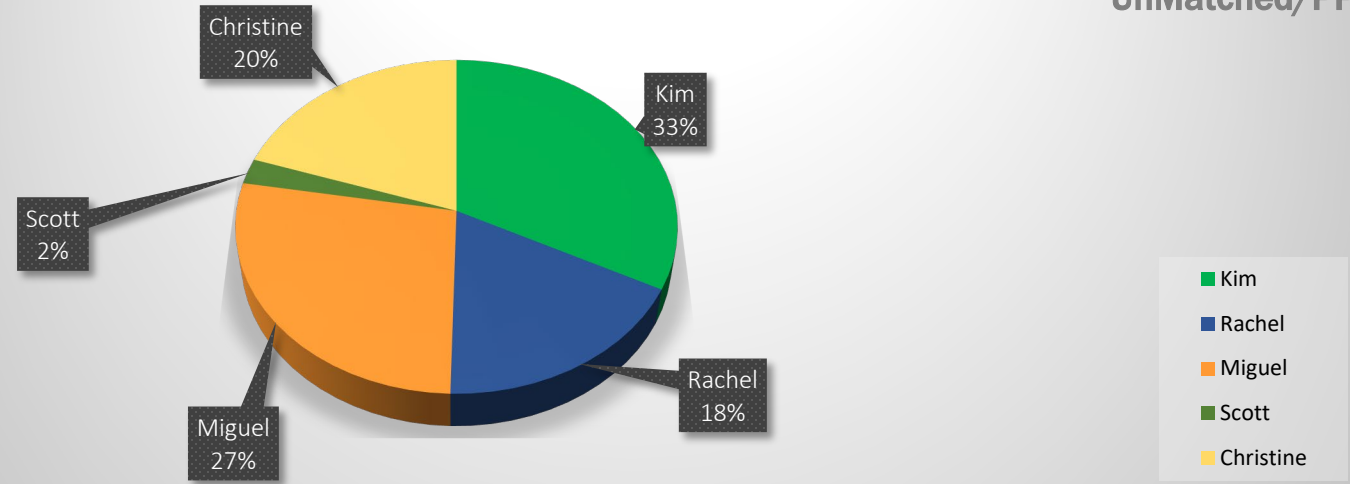
# Surplus Property Sales Relocation

- SPS vacating Bonair Siding
  - Bonair Siding scheduled for demolition beginning June 2024
  - Anticipate our relocation to be complete by May
  - Some changes in process at the leased warehouse
- Attempting to minimize impact on services during transition period
- SPS will relocate to RWC
- Share space with Furniture Reuse Program
- Space more limited; throughput will need to be quicker
- SPARC Excess Requests for items to be collected
  - **S/Ns required for all computing devices**
- Updates have been made to Property Manual
- What can you do to help?
  - Be flexible
  - Allow as much advance notice as possible

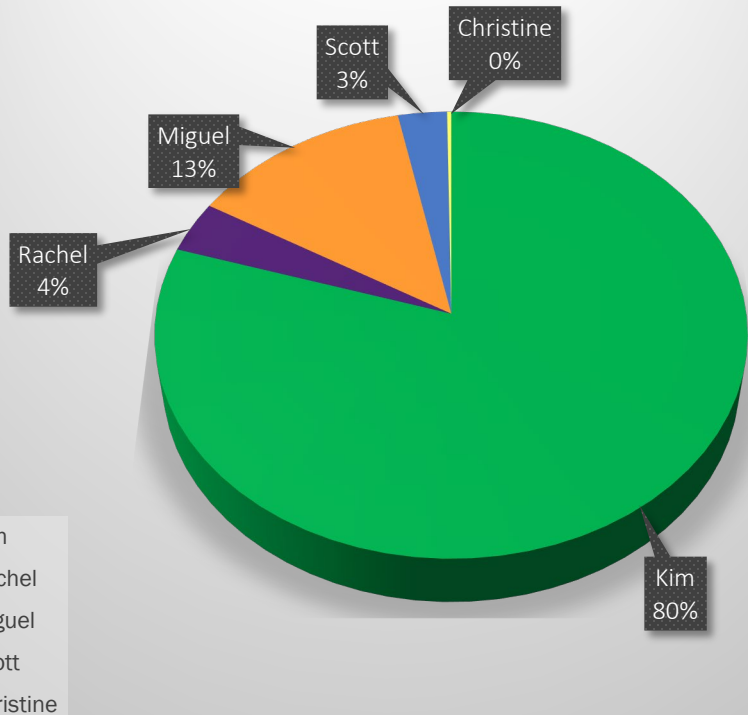


# Unmatched Awareness

Metrics as of March 2024



## Waiting/PPM



- Importance of 30 Days receipt to record
  - Affects Inventory Process
  - Non-timely identification and recording allows potential for equipment to go missing
  - Creates more work for DPA and PMO
- Don't Wait, Be Proactive
- Communicate with your PPM
  - Provide Updates as received
- \$38 Million in total unmatched Purchase Orders
- \$49 Million in total Waiting Purchase Orders



# Why we track leased equipment



Federal Accounting Standards Board (FASB) now requires more reporting on Leases.



FMS records all leases greater than \$50,000 as part of their financial liability requirement



PMO reviews and approves leases on a quarterly basis.



# Leased Equipment- What we track in SFA



Total lease term commitment  
over one year.



Total financial commitment  
over \$5000



Lease with a term under one  
year, with an option to renew



# Lease Tracking Process

PMO

- Informs PPM of lease
- PPM provides financial and physical information for lease record to DPA

DPA

- Creates SFA record from scratch
- Includes: lease term, serial number, location, value of entire lease as well as descriptive asset information, Department and Custodian.

PPM

- Follows up on lease record creation
- Reaches out at the end of term for return, buy out or extension of lease

# Lease Expenditure Types



52910	LEASE EQUIPMENT >1yr; <\$5K	Less than \$5K commitment, Greater than one year
52921	LEASE GEN PURPOSE EQUIP >\$5K	\$5K+ commitment, Greater than one year, Non-research equipment
52951	LEASE SPEC PURPOSE EQUIP >\$5K	\$5K+ commitment, Greater than one year, Research equipment
52981	LEASE EQUIP. 1 MO TO 1 YEAR	Greater than one month but less than one year, and \$ commitment
52992	RENT OTHER	<1 MO or other rental



## 2024 Business Affairs Performance Year Initiative

### EUHL Initiative

- Focused on intentional and full life cycle tracking of computing devices
  - Identifying and tracking s/n of computing devices from time of purchase through final disposition
  - Reconciling acquisitions with total dispositions
  - Essentially managing the risk with prior limited visibility of devices
- May include potential service options from IT
- Project focusing on Business Affairs
  - From PMO perspective, will apply campus-wide
- Process change recommendations will be proposed at the end of April
- Updates made to property manual
- Communications and awareness activity
  - Business Affairs, targeted audiences, and campus-wide
  - PMO DPA Training will be enhanced
  - Tools and resources enhanced
  - Seeking to develop new employee property awareness module

# Data Quality Assurance - Importance of Serial Numbers

- Provides a secondary source for Capital asset confirmation
- Primary source for non-cap computers
- Accuracy of SFA records
- Data Quality Assurance
  - Monthly report run
  - Reviewed for a variety of different areas
    - Serial Number
    - Location
    - Purchase Order
    - Missing data
  - Campus Support team notified to follow-up with DPA



# Fabrication Number Update/Change

Previously all fabrications assigned 4-digit number

As of January 1, 2024 5 - digit numbers being assigned beginning with a 4

Request process remains unchanged

# B25 Inventory Update

- **Year 1 scanning continues**
  - 20 Departments and/or Schools scanned.
  - School of Engineering currently being scanned
  - Affidavit inventory scheduled for summer 2024
- **New Posters Available**
- **Steps to Prepare For An Inventory**
  - Resolve Unmatched Purchase Orders
  - Notify Faculty, Labs, Staff of upcoming scanning dates
  - Walk space
  - Continue excessing as needed



**Stanford University Biennial Equipment Inventory**  
Taking place at this location on:

**What to expect**  
The PMO Inventory team will arrive to scan your building at a pre-determined day and time, moving through the space as efficiently as possible. Your Department Property Administrator will often accompany the PMO scanner(s).

**Why it's important**  
Assets with barcode tags are very important, we track them for a variety of stewardship, financial and compliance reasons. Successful inventories make Stanford a preferred Institution for external funding.

**How you can help**  
Please have any equipment with a barcode tag out and visible to facilitate scanning and verification. Contact your DPA with any days/times that your space is inaccessible during scanning to reschedule.

**DPA Contact Info:**

**Stanford University Property**  
000003 039564



**Stanford University Biennial Equipment Inventory**  
Will take place at this location on:

**What to expect**  
• The PMO Inventory team will arrive to scan your building at a pre-determined day and time, moving through the space as efficiently as possible. Your Department Property Administrator will often accompany the PMO scanner(s).

**Why it's important**  
• Assets with barcode tags are very important, we track them for a variety of stewardship, financial and compliance reasons. Successful inventories make Stanford a preferred Institution for external funding.

**How you can help**  
• Please have any equipment with a barcode tag out and visible to facilitate scanning and verification. Contact your DPA with any days/times that your space is inaccessible during scanning to reschedule.

**Where to go for more information**  
• Your DPA  
• PMO website: <https://ora.stanford.edu/ora-units/property-management-office>



# Uniform Guidance Audit Updates

- All requested documents submitted
- Physical verification conducted on Thursday April 11, 2024
  - Thank You to all who participated
- Awaiting final report from PwC





## Comprehensive Dashboard Report

This report provides physical attributes of all equipment records housed in the Sunflower property management database. Also includes financial details for capital equipment reconciled in the Oracle Financials system. Can be configured to include active records, retired records, or both. Exportable as both formatted and tabular output.

Here is the link to the new Dashboard for PMO central reports and PMO Department Reports.

<https://bi.stanford.edu/analytics/saw.dll?Dashboard&PortalPath=%2Fshared%2FFinance%2F%20Management%20Office%20Reporting&page=Excess%20Inactive%20Assets>

Save to your favorites for easy access once the old reports are taken down.



# Here's what you'll see:

Oracle log in (SUnet ID and password)

Add this link to favorites!

Click the Comprehensive Dashboard Report to get started

## PMO Department Dashboard Links

Click this link...	...for reports about
<a href="#">Comprehensive Dashboard Report</a>	This report provides physical attributes of all equipment records housed in the Sunflower property management database. Also includes financial details for capital equipment reconciled in the Oracle Financials system. Can be configured to include active records, retired records, or both. Exportable as both formatted and tabular output.
<a href="#">295 Excess Asset Report</a>	Contains disposal information for retired assets, including date and method of disposal, with accompanying details when available.
<a href="#">Equipment Depreciation Forecast Report</a>	Lists, by a specified organization code and fiscal year, all active records in Oracle Financials Fixed Assets with remaining net book value (depreciation), as well as a forecast for current or future years for the estimated monthly depreciation of each asset. Particularly useful for service centers or others when developing budgets and/or asset replacement schedules.
<a href="#">196 Capital Equipment Expenditure Transactions Report</a>	Reflects all capital transactions from any source (APINV, PCARD, JNL) for a given Project, Task, and/or Award within a specified date range, including fiscal year to date and project to date.

Always use the search and select feature for your criteria entries

## 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--	<b>Dept Code</b>	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

Acquisition Date	Between	09/01/2020	-	10/23/2023
Asset Life Status:	Active			

Apply Reset

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

Building-Floor	Room	Street Address	Parcel Number	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	Fleet ID Number	Last Inventory Resolution	Last Inventory Date	Untaggable Indicator	PMO Date
590-00	0120	269 CAMPUS DR STANFORD	142-05-045	9/30/2022	PURCHASE	62959256	0.00	0.00	42,075.00	100.00%	1126741	800	XIABC	53115	8/31/2035	1870981	Y	NA						BARCODE SCAN	3/15/2023	TAGGABLE	5/15/2023
							42,075.00	33,660.00	0.00	NA				1870981	N	NA	BARCODE SCAN	3/15/2023	TAGGABLE	5/15/2023							
							<b>42,075.00</b>	<b>33,660.00</b>	<b>42,075.00</b>																		
097-01	1208	3155 PORTER DR PALO ALTO	142-18-042	3/15/2022	PURCHASE	62731771	0.00	0.00	297,563.35	100.00%	1259622	100	PAJIQ	53115	9/19/2022	1950980	Y	189707						INVENTORY ASSET INITIAL EVENT	11/23/2022	TAGGABLE	
							297,563.35	208,229.34	0.00	NA				1950980	N	NA	INVENTORY ASSET INITIAL EVENT	11/23/2022	TAGGABLE								
							<b>297,563.35</b>	<b>208,229.34</b>	<b>297,563.35</b>																		
590-00	0233	269 CAMPUS DR STANFORD	142-05-045	7/11/2022	PURCHASE	62881171	0.00	0.00	15,951.13	100.00%	1126741	800	XIABC	53115	8/31/2035	1862988	Y	NA						INVENTORY ASSET INITIAL EVENT	9/21/2022	TAGGABLE	
							15,951.13	12,229.23	0.00	NA				1862988	N	NA	INVENTORY ASSET INITIAL EVENT	9/21/2022	TAGGABLE								
							<b>15,951.13</b>	<b>12,229.23</b>	<b>15,951.13</b>																		
590-00	0120	269 CAMPUS DR STANFORD	142-05-045	9/8/2022	PURCHASE	62904689	0.00	0.00	5,931.81	100.00%	1126741	800	XIABC	53115	8/31/2035	1924990	Y	NA						INVENTORY ASSET INITIAL EVENT	11/23/2022	TAGGABLE	
							5,931.81	4,745.46	0.00	NA				1924990	N	NA	INVENTORY ASSET INITIAL EVENT	11/23/2022	TAGGABLE								
							<b>5,931.81</b>	<b>4,745.46</b>	<b>5,931.81</b>																		
590-00	0128	269 CAMPUS DR STANFORD	142-05-045	4/22/2023	PURCHASE	63113844	0.00	0.00	12,106.24	100.00%	1126741	800	XIABC	53115	8/31/2035	2015997	Y	NA						INVENTORY ASSET INITIAL EVENT	7/10/2023	TAGGABLE	
							12,106.24	11,097.20	0.00	NA				2015997	N	NA	INVENTORY ASSET INITIAL EVENT	7/10/2023	TAGGABLE								

FORMATTED REPORT DATA

# Report Data Arrangement

- from left to right

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 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



ALLOW	974R-02-2370 WATSON CT, PALO ALTO	90 - AREAS NOT IN 1-14	974R-02	213	2370 WATSON CT PALO ALTO		5/25/2017	PURCHASE	61432521	0.00	0.00	-24,210.43	-182.87%	1028077	626	EAFGS	53115	8/31/2027	1223923	Y	NA	124394	N/A		BARCODE SCAN	9/2
										0.00	0.00	37,449.79	282.87%	1195855	100	UAIGW	53115	7/31/2018	1223923	Y	124394	124394	N/A		BARCODE SCAN	9/2
																									BARCODE SCAN	9/2
ALLOW	974R-02-2370 WATSON CT, PALO ALTO	90 - AREAS NOT IN 1-14	974R-02	255A	2370 WATSON CT PALO ALTO		5/25/2017	PURCHASE	61432521	0.00	0.00	12,105.21	100.00%	1028077	626	EAFGS	53115	8/31/2027	1223928	Y	NA				BARCODE SCAN	9/2
										12,105.21	0.00	0.00					NA		1223928	N	NA				BARCODE SCAN	9/2
										<b>12,105.21</b>	<b>0.00</b>	<b>12,105.21</b>														
ALLOW	974R-02-2370 WATSON CT, PALO ALTO	90 - AREAS NOT IN 1-14	974R-02	212	2370 WATSON CT PALO ALTO		3/29/2018	PURCHASE	61667380	0.00	0.00	0.00	0.00%	1208092	100	UAKYI	53115	1/31/2019	1357786	Y	131981	124428	N/A		ONLINE PHYSICAL	7/1
										0.00	0.00	2,206.34	4.11%	1213748	209	EAFGS	53115	8/31/2027	1357786	Y	NA	124428	N/A		ONLINE PHYSICAL	7/1
										0.00	0.00	6,829.06	12.72%	1192400	100	UAVEL	53115	1/31/2019	1357786	Y	124428	124428	N/A		ONLINE PHYSICAL	7/1
										0.00	0.00	44,651.56	83.17%	1195855	100	UAIGW	53115	7/31/2018							ONLINE PHYSICAL	7/1
										53,686.96	0.00	0.00					NA								ONLINE PHYSICAL	7/1
										<b>53,686.96</b>	<b>0.00</b>	<b>53,686.96</b>														
ALLOW	974R-02-2370 WATSON CT, PALO ALTO	90 - AREAS NOT IN 1-14	974R-02	212	2370 WATSON CT PALO ALTO		11/20/2017	PURCHASE	61604954	0.00	0.00	9,780.29	100.00%	1205165	100	PAKYM	53115								BARCODE SCAN	9/2
										9,780.29	0.00	0.00					NA								BARCODE SCAN	9/2
										<b>9,780.29</b>	<b>0.00</b>	<b>9,780.29</b>														
ALLOW	220-01- CHEM-H AND NEURO	14 - JORDAN QUAD	220-01	E161	290 JANE STANFORD WAY STANFORD	142-05-054	11/20/2017	PURCHASE	61593949	0.00	0.00	21,042.50	100.00%	120			53120	4/30/2019		Y	131084	131084	5U01EY02547705		ONLINE PHYSICAL	5/1
										21,042.50	0.00	0.00					NA		1305824	N	NA	131084	5U01EY02547705		ONLINE PHYSICAL	5/1
										<b>21,042.50</b>	<b>0.00</b>	<b>21,042.50</b>														

# Exporting Data

Print/Export function is at the bottom center of the report. Report formatting choices expand as selected.

21,042.50 100.00% 120

- Excel
- CSV
- Tab Delimited
- XML

21,042.50 0.00

21,042.50 0.00

Print -Export

When the export process is complete - Click to open report from drop-down

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The screenshot displays a web application interface with a data table and two overlaid elements. The table contains columns for numerical values, percentages, and alphanumeric codes. A download menu is open on the right side, listing several files with their completion status and sizes. A confirmation dialog box is centered over the table, indicating that the export process is complete.

Value 1	Value 2	Value 3	Value 4	Value 5	Value 6	Code 1	Code 2	Date	Code 3	Code 4	Code 5	Code 6	Code 7	Code 8	Code 9	Code 10	Code 11	Code 12
0.00	0.00	-24,210.43	-182.87%	1028077	626	EAFGS	53115	8/31/2027	1223923	Y								
0.00	0.00	37,449.79	282.87%	1195855	100	UAIGW	53115	7/31/2018	1223923	Y								
3,239.36	0.00	0.00					NA		1223923	N								
3,239.36	0.00	13,239.36																
0.00	0.00	12,105.22	100.00%	1028077	626	EAFGS	53115	8/31/2027	1223927	Y								
2,105.22	0.00	0.00					NA		1223927	N								
2,105.22	0.00	12,105.22																
0.00	0.00	12,105.21	100.00%	1028077	626	EAFGS	53115	8/31/2027	1223928	Y	NA							BARCODE SCAN
2,105.21	0.00	0.00					NA		1223928	N	NA							BARCODE SCAN
2,105.21	0.00	12,105.21																
0.00	0.00	0.00				JAKYI	53115	1/31/2019	1357786	Y	131981	124428	N/A					ONLINE PHYSICAL
0.00	0.00	2,244.28				EAFGS	53115	8/31/2027	1357786	Y	NA	124428	N/A					ONLINE PHYSICAL
0.00	0.00	6,886.96				JAVEL	53115	1/31/2019	1357786	Y	124428	124428	N/A					ONLINE PHYSICAL
0.00	0.00	44,686.96				JAIGW	53115	7/31/2018	1357786	Y	124394	124428	N/A					ONLINE PHYSICAL
3,686.96	0.00	0.00					NA		1357786	N	NA	124428	N/A					ONLINE PHYSICAL
3,686.96	0.00	53,686.96																

**Download Menu:**

- Comprehensive - Active(4).xlsx Completed — 10.4 KB
- Comprehensive - Active(3).xlsx Completed — 10.4 KB
- Comprehensive - Active.csv Completed — 38.0 KB
- exrv6010c\_20240327\_062242.csv Completed — 7.0 KB
- forms.jnlp File moved or missing

**Confirmation Dialog:**

Confirmation  
The Export process is complete.  
OK

# Filtering Data

To filter financial data scroll right to the Fixed Asset Invoice Flag field (column BA). (Select All) is the default.

Includes both SFA and FA financial data

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T			
1	SUID Tag N	Untaggabl	Sponsor T	Fleet ID N	Descriptio	Manufac	Model Nu	Serial Nur	Year of Mf	Accounta	Owner	Service Ce	IDC Flag	Ir	Last Inven	Status	Condition	Acquisitio	Attachme	Final Ever	Surplus Pr	PN
2	7297298	TAGGABLE			SPECTRAL HEIDELBEF HRA+OCT	SPEC-KT-0		2017			STANFORD UNIVERS	ALLOW	BARCODE	IN SERVIC	GOOD COI	PURCHASI	C,P					
3	7297298	TAGGABLE			SPECTRAL HEIDELBEF HRA+OCT	SPEC-KT-0		2017			STANFORD UNIVERS	ALLOW	BARCODE	IN SERVIC	GOOD COI	PURCHASI	C,P					
4	7318399	TAGGABLE			OPTICAL T NEWPORT RS4000	04SM2288301		124394			STANFORD UNIVERS	ALLOW	BARCODE	IN SERVIC	GOOD COI	PURCHASI	C					
5	7318399	TAGGABLE			OPTICAL T NEWPORT RS4000	04SM2288301		124394			STANFORD UNIVERS	ALLOW	BARCODE	IN SERVIC	GOOD COI	PURCHASI	C					
6	7318399	TAGGABLE			OPTICAL T NEWPORT RS4000	04SM2288301		124394			STANFORD UNIVERS	ALLOW	BARCODE	IN SERVIC	GOOD COI	PURCHASI	C					
7	7318443	TAGGABLE			OPTICAL T NEWPORT RS4000	04SM2287		2017			STANFORD UNIVERS	ALLOW	BARCODE	IN SERVIC	GOOD COI	PURCHASI	C					
8	7318443	TAGGABLE			OPTICAL T NEWPORT RS4000	04SM2287		2017			STANFORD UNIVERS	ALLOW	BARCODE	IN SERVIC	GOOD COI	PURCHASI	C					
9	7318450	TAGGABLE			OPTICAL T NEWPORT RS4000	04SM2289		2017			STANFORD UNIVERS	ALLOW	BARCODE	IN SERVIC	GOOD COI	PURCHASI	C					
10	7318450	TAGGABLE			OPTICAL T NEWPORT RS4000	04SM2289		2017			STANFORD UNIVERS	ALLOW	BARCODE	IN SERVIC	GOOD COI	PURCHASI	C					
11	7319921	TAGGABLE			LASER NKT PHOT EXU6	17490186		2017	124428		STANFORD UNIVERS	ALLOW	ONLINE PH	IN SERVIC	GOOD COI	PURCHASI	C					
12	7319921	TAGGABLE			LASER NKT PHOT EXU6	17490186		2017	124428		STANFORD UNIVERS	ALLOW	ONLINE PH	IN SERVIC	GOOD COI	PURCHASI	C					
13	7319921	TAGGABLE			LASER NKT PHOT EXU6	17490186		2017	124428		STANFORD UNIVERS	ALLOW	ONLINE PH	IN SERVIC	GOOD COI	PURCHASI	C					
14	7319921	TAGGABLE			LASER NKT PHOT EXU6	17490186		2017	124428		STANFORD UNIVERS	ALLOW	ONLINE PH	IN SERVIC	GOOD COI	PURCHASI	C					
15	7319921	TAGGABLE			LASER NKT PHOT EXU6	17490186		2017	124428		STANFORD UNIVERS	ALLOW	ONLINE PH	IN SERVIC	GOOD COI	PURCHASI	C					
16	7319969				MONOCHI MIKROTRC3CXP	00177		2017	131084		STANFORD UNIVERS	ALLOW	BARCODE	IN SERVIC	GOOD COI	PURCHASI	C					
17	7319969				MONOCHI MIKROTRC3CXP	00177		2017	131084		STANFORD UNIVERS	ALLOW	BARCODE	IN SERVIC	GOOD COI	PURCHASI	C					
18	7319983	UNTAGGABLE			WAVEFOR ALAZAR TI AT S9416-C	S820057		2017	131084		STANFORD UNIVERS	ALLOW	ONLINE PH	IN SERVIC	GOOD COI	PURCHASI	C					
19	7319983	UNTAGGABLE			WAVEFOR ALAZAR TI AT S9416-C	S820057		2017	131084		STANFORD UNIVERS	ALLOW	ONLINE PH	IN SERVIC	GOOD COI	PURCHASI	C					
20	7329036				OPTICAL T NEWPORT RS4000	1863322		2017			STANFORD UNIVERS	ALLOW	ONLINE PH	IN SERVIC	GOOD COI	PURCHASI	C					
21	7329036				OPTICAL T NEWPORT RS4000	1863322		2017			STANFORD UNIVERS	ALLOW	ONLINE PH	IN SERVIC	GOOD COI	PURCHASI	C					
22	7390654	TAGGABLE			OPTICAL T NEWPORT 04SM1947	10275443		2021			STANFORD UNIVERS	ALLOW	ONLINE PH	IN SERVIC	GOOD COI	PURCHASI	C					
23	7390654	TAGGABLE			OPTICAL T NEWPORT 04SM1947	10275443		2021			STANFORD UNIVERS	ALLOW	ONLINE PH	IN SERVIC	GOOD COI	PURCHASI	C					
24	7390685	UNTAGGABLE			DIGITIZER ALAZAR TI AT S9416	S820194		2021			STANFORD UNIVERS	ALLOW	INVENTOF	IN SERVIC	GOOD COI	PURCHASI	C					
25	7390685	UNTAGGABLE			DIGITIZER ALAZAR TI AT S9416	S820194		2021			STANFORD UNIVERS	ALLOW	INVENTOF	IN SERVIC	GOOD COI	PURCHASI	C					

AV	AZ	BA	BB
Asset Steward	Org Code	Fixed Asset Invoice Flag	PO/Acq Doc Identifier
XDCI			61565580
XDCI			61565580
XDCI			61432521
XDCI			61432521
XDCI			61432521
XDCI			61432521
XDCI			61432521
XDCI			61432521
XDCI			61432521
XDCI			61432521
XDCI			61667380
XDCI			61667380
XDCI			61667380
XDCI			61667380
XDCI			61667380
XDCI			61667380
XDCI			61604954
XDCI			61604954
XDCI			61593949
XDCI			61593949
XDCI			61507860
XDCI			61507860
NKJB			62517738
NKJB			62517738
XDCI			62706089
XDCI			62706089
XDCI			62349777
XDCI			62349777
XDCI			62223255
XDCI			62223255
XDCI		N	61934139
XDCI		Y	61934139
XDCI		Y	61934139
XDCI		N	61934139
XDCI		Y	62067756
XDCI		Y	62067756
XDCI		N	62067756
XDCI		Y	61865388

Sort A to Z

Sort Z to A

Sort by Color

Sheet View

Clear Filter From "Fixed Asset Invo..."

Filter by Color

Text Filters

Search

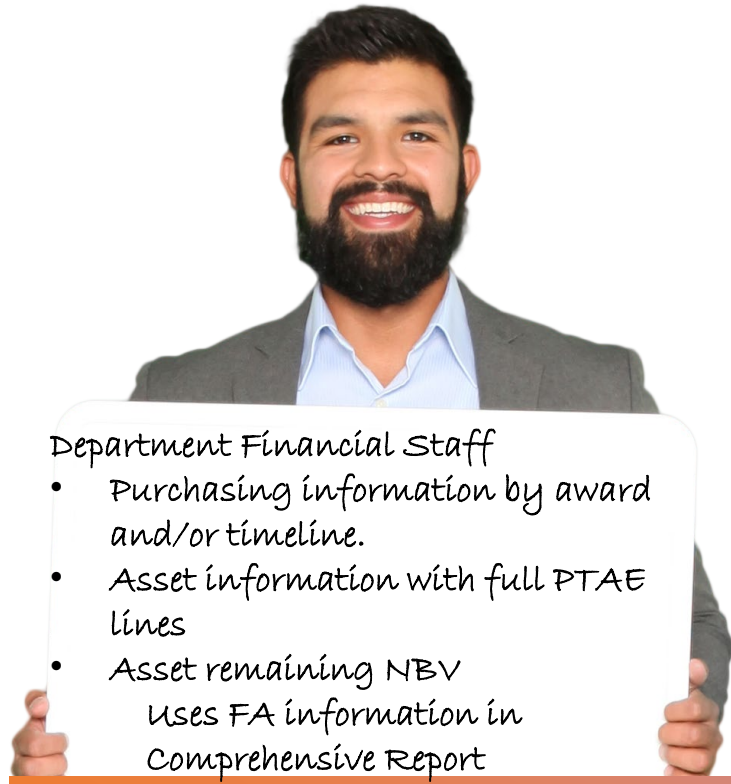
(Select All)

N

Y

OK Cancel

SFA data only = N  
FA data only = Y



Department Financial Staff

- Purchasing information by award and/or timeline.
- Asset information with full PTAE lines
- Asset remaining NBV  
Uses FA information in Comprehensive Report



service center financial staff

- Uses DEPRECIATION FORECAST RPT.
- Uses FA INFORMATION IN COMPREHENSIVE REPORT
  - PTAE REVIEW
  - REPORT BY TIMELINE
  - ALLOW/UNALLOW FLAG REVIEW



Department Property Administrators

- Asset information for Custodian
- Asset information by location
- Asset information with full PTAE lines
- Asset remaining NBV  
Uses SFA/FA information in Comprehensive Report

Who Uses What and Why?



# Equipment Transfers-DPA Process

## • **Transfer In – to Stanford**

- Contact your PPM as soon as you hear of an incoming transfer
- Gather information:
  - Faculty member's name and move timeframe
  - Institution transferring from
  - Manufacturer, Model and Description of equipment
  - Funding source, acquisition date and value
  - Contact in Property at the transferring institution

## • **Transfer Out – to another Institution**

- Contact your PPM as soon as you hear of an outgoing transfer
- Gather information:
  - Faculty member's name and move timeframe
  - Institution transferring to
  - Run a Comprehensive report for equipment they wish to transfer
    - This report will provide all information needed by the PPM to evaluate the proposed transfer
  - Contact in Property at the receiving institution

An illustration of a person with long brown hair, wearing an orange long-sleeved shirt and dark pants, walking away from the viewer on a light-colored path. The path curves through a green landscape. In the background, there is a small village with several houses with red roofs. Further back are rolling hills in shades of green and blue. The sky is a mix of blue and yellow, suggesting a sunset or sunrise. A wooden signpost with a single arrow pointing left is visible on the right side of the path.

# Equipment Transfers- watch for bumps in the road!

- Assets with remaining NBV will need more review and approvals
- A new faculty member's equipment shows up without any background documentation
- There is split funding and award status for an asset transferring
- They are transferring a data handling device with the purchasing grant

Contact your PPM!

A group of diverse office professionals in a meeting, smiling and looking at documents. The background is a blurred office setting with desks, computers, and plants. The text is overlaid on the image in a large, white, sans-serif font.

# New Staff and Faculty Property Orientation

Handling and Disposal of Stanford Equipment

Soon to be part of New Employee Orientation resources

# SPARC Excess Request Enhancements

- Expanded Announcement and Instructions
- Delete unnecessary drafts to avoid program errors
- Contact information explanations Coming Soon!
- Serial number field will become a required for non-capital computer equipment. Always separate multiple serial numbers with a comma

Stanford University | Property Administration Resource Center (SPARC) Search Kim Kaehler

SPARC Home page | Dashboard | DPA Tasks | PMO Tasks | Reports | About | Authorities | Getting Started | Quick Links | Help

**Excess** **Excess Approvals 21** [PMO Review](#)

**Announcement & Instructions**

*PMO's webpage has been revised to include more information on disposals.* Please see the link below to access the new information.  
<https://ora.stanford.edu/ora-units/property-management-office/surplus-property-overview>

**Furniture and Office Supplies are not collected by Surplus.** Please use the Reuse web site, visit our re-utilization page or contact Steven Magee (for furniture reuse) at swmagee@stanford.edu.  
<https://ora.stanford.edu/ora-units/property-management-office/reutilization-furniture>

**Instructions**

**For specific steps in handling disposals,** please visit our web site at:  
<https://ora.stanford.edu/ora-units/property-management-office/surplus-property-sales/surplus-property-disposals>

**For specific steps in handling personal computing devices and smart phone disposals,** please visit:  
<https://ora.stanford.edu/ora-units/property-management-office/disposals-end-user-computers-tablets-and-phones>

Please note - the numbers needed for either a PSSI or a UG2 work request are the REQUEST numbers. You do not need to wait for the request to be converted to a work order. The Service Request (SR) number is the expected value

**My Drafts**

ER ↓	Request Org Code	Items	Date Created	Category	Old Req	Attachments	Del
61732T	-	-	05-APR-24	Standard	-	0	🗑
61728T	XFDC	1	04-APR-24	Standard	-	0	🗑
61727	-	-	04-APR-24	Standard	-	0	🗑

**Contact Information**

**Primary Contact** ⓘ

\* SUnet ID:  ⓘ

\* Name:

\* Phone:

**Backup Contact** ⓘ

\* SUnet ID:

\* Name:

\* Phone:

# SPARC Tagged Excess Request Enhancements

- Tagged Excess Request Updates
- SUID tag numbers search:
  - Click +Add Item to begin search

## Collection Information

\* Quad-Building 07-306 (E.D. S  
Earliest Pickup 04/10/2024  
Proceeds PTA ?  
\* Award BAAAA  
Billable PTA ?  
\* Award BAAAA  
PSSI BGM #  
UG2 Req #

### Add Tag Items

**Request ID** 61732  
Tag Number   
Description   
Serial #

### Tag Items List

Tag Number	Description	Serial #
------------	-------------	----------

## Items

Q v

Delete Checked Rows + Add Item

Review Prior To Submit Save Changes

X Close

+ Add

- Reports >
- About
- Authorities
- Getting Started
- Quick Links >
- Help >

### Collection Information

\* Quad-Building 07-306 (E.D. S

Earliest Pickup 04/10/2024

Proceeds PTA ?

\* Award BAAAA

Billable PTA ?

\* Award BAAAA

PSSI BGM #

UG2 Req #

### Items

Q

Delete Checked Rows + Add Item

Review Prior To Submit Save Changes

### Add Tag Items

Request ID 61732

Tag Number

Description 0678742

Serial #

Tag #	Description	Model	Make	Serial #	Org Code
0678742	CART	PPC16-MS-N...	ANTHRO CO...	-	

Show More

### Tag Items List

Close

# SPARC Tagged Excess Request Enhancements

- Tagged Excess Request Updates
- SUID tag numbers search:
  - Click +Add Item to begin search
  - Click in Tag Number field and click search icon, click on SUID number to fill the search fields
  - Click +Add Item button to create row
  - Select +Add Item to create another asset row (within your Department Org Code) or click Close to continue.

tems

# SPARC Tagged Excess Request Enhancements

Q  Go Actions

<input type="checkbox"/>	Tag Number	Description
<input type="checkbox"/>	0678742	CART

Delete Checked Rows Add Item

- Tagged Excess Request Updates
- SUID tag numbers search:
  - Click +Add Item to begin search
  - Click in Tag Number field and click search icon, click on SUID number to fill the search fields
  - Click +Add Item button to create row
  - Select +Add Item to create another asset row (within your Department Org Code) or click Close to continue
  - Select Review Prior to Submit and Submit as usual

# Reminders

## Approving Requestions/tagging and record entry

It is PMO policy for the DPA to ensure tagging and recording Capital Equipment on Requisitions they approve.

An exception can be made if a DPA is filling in for another during a vacation or illness. Make a note of that in the requisition notes.

## Possible reasons a PO is not available in the PO Interface

The PO has not been received in iProcurement (overnight refresh to flow into Interface)

The equipment on the PO was coded as non-capital

You have entered the wrong PO or there is a typo/extra space in the entry

## Allocation of PO lines to record

Capital equipment or system

Accessories and/or start up supplies

Shipping, handling and vendor installation



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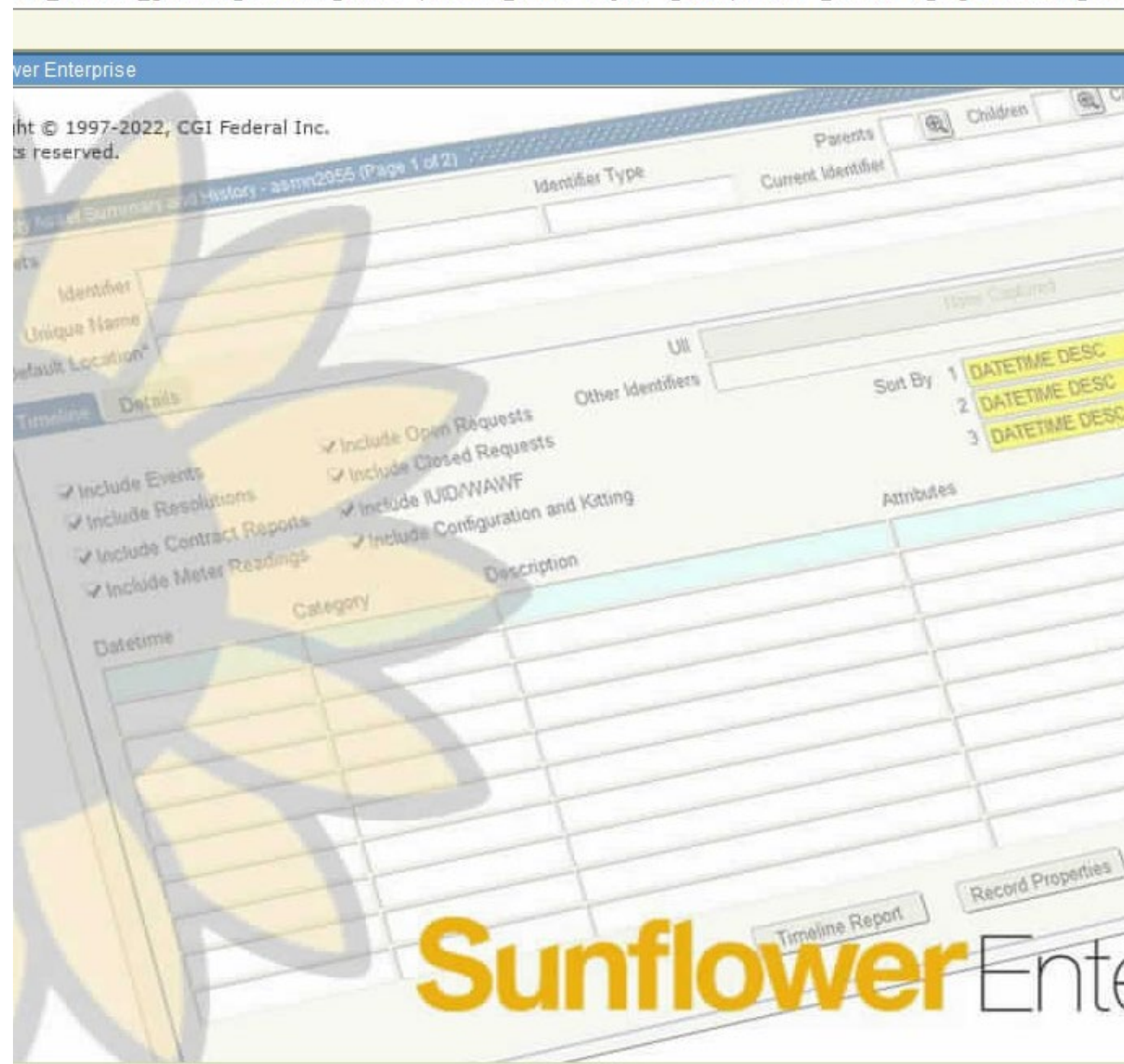
Capital equipment or system

Accessories and/or start up supplies

Shipping, handling and vendor installation

# Sunflower Upgrade

- Annual upgrade planned
- Latest release occurred late March – eliminating JAVA issues
- Aiming to implement prior to graduation code freeze
- May affect PO Interface
- Sunflower is preparing a more modern user interface



**Sunflower** Enterprise

# Spread Property Awareness and Outreach

- Make sure your Department staff and labs know who you are and what you do.
- Let them know why good Property management is important to them.
- Share how your position benefits the goals of the University.
- Encourage stewardship
  - Responsible handling of equipment and devices
  - Proper disposals when needed
- Be their go-to person for Department property!

# 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, two morning class - Zoom June 18 & 19, 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 October 2024.

# EDUCATION IS A WIN

## ★ GO ALL IN WITH ★

NPMA 2024 National Education Seminar



Reno, Nevada

July 29 – August 1, 2024



## NPMA Educational Opportunities

- NES July 29-Aug 1, Reno, Nevada at the Peppermill Resort
  - Early Registration Rate in effect until June 3.  
<https://www.npma.org/events/register.aspx?id=1778000&itemid=fc7b3538-4340-415d-8288-1258aa6215fb>
  - STAP funds-eligible
  - Will include many topics and workshops applicable to us at Stanford
- Higher Education and Research Chapter Fall Workshop last week in October
- NPMA Fall Chapter Seminar – first full week in November



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Thank You for  
Attending!

Next PACE Meeting  
October 17, 2024  
PMO-3000 in STARS