Spring 2024 PACE Meeting
PMO - 3000

April 17, 2024

Welcome!

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

▶

Welcome New DPAs!

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

- **Blake Koach-Gates**
- **Blanca Tezanos**
- **Jennifer Bijan**
- **John Lee**
- **Julianna Trinidade**
- **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!
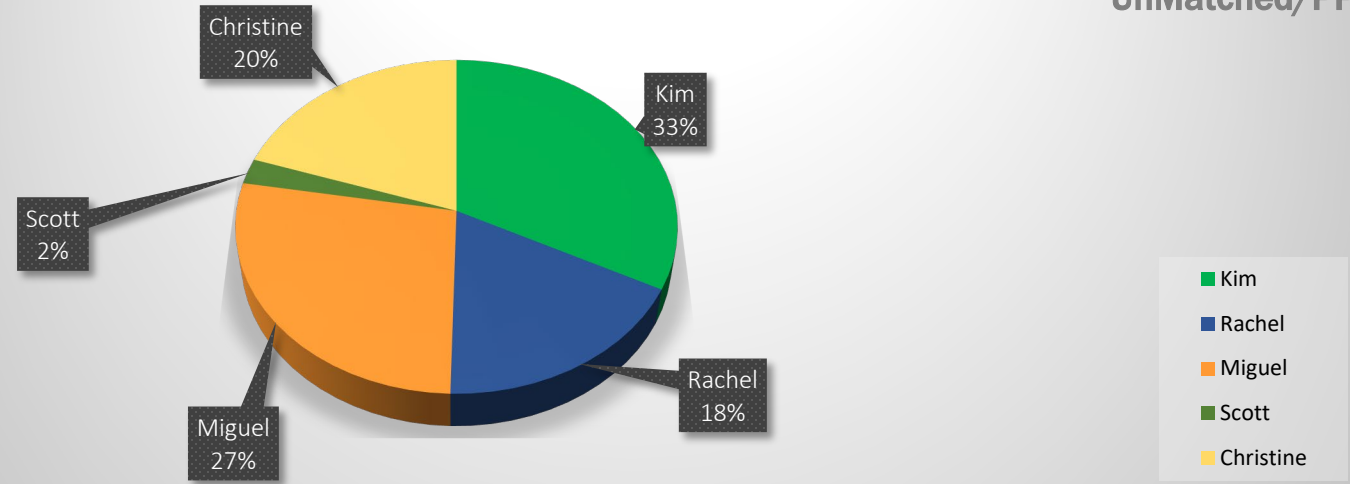 - Jimmy Baca will be on leave beginning in May

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
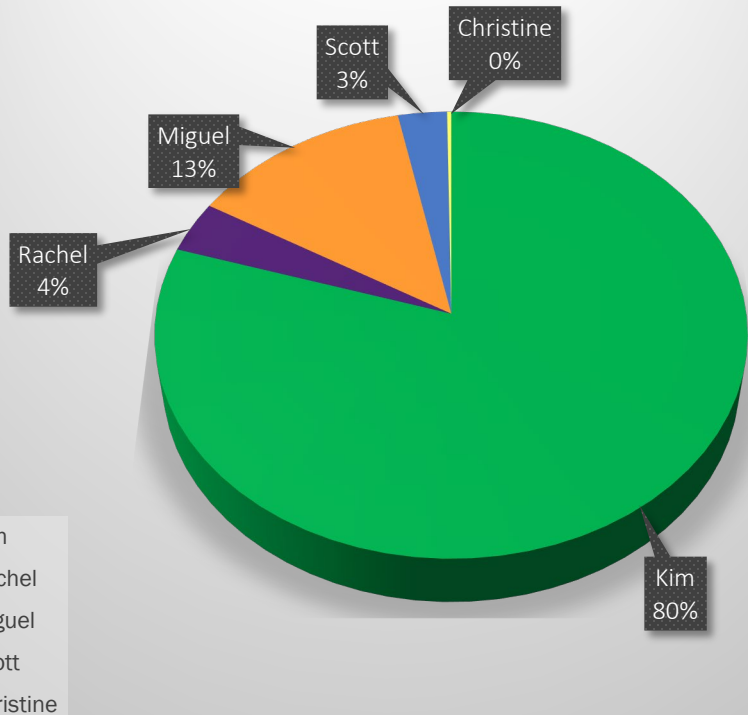 - Allow as much advance notice as possible

Unmatched Awareness
Metrics as of March 2024

Kim 33%
Rachel 18%
Miguel 27%
Scott 2%
Christine 20%

Legend: Kim, Rachel, Miguel, Scott, Christine

Christine 0%
Scott 3%
Miguel 13%
Rachel 4%
Kim 80%

Legend: Kim, Rachel, Miguel, Scott, Christine

- 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

Buy or Lease?

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

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%2[...]nagement%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

Comprehensive Dashboard Report

STANFORD UNIVERSITY

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

Comprehensive Dashboard

User ID: kkaehler
Database: DW2_PRD
OF1PRD

Always use the search and select feature for your criteria entries

Field	Value	Field	Value	Field	Value	Field	Value
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--
Untagable 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

Apply   Reset ▼

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

FORMATTED REPORT DATA

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	Untagable 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
							42,075.00	33,660.00	0.00					NA		1870981	N	NA						BARCODE SCAN	3/15/2023	TAGGABLE	5/15
							42,075.00	**33,660.00**	**42,075.00**																		
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	20,094.34	0.00					NA		1950980	N	NA						INVENTORY ASSET INITIAL EVENT	11/23/2022	TAGGABLE	
							297,563.35	**28,2..34**	**297,563.35**																		
590-00	0233	269 CAMPUS DR STANFORD	142-05-045	7/../2022	PURCHASE	62881..	0.00		15,951.13	100.00%	112..74	800	XIAB.	53115	8/..2035	..629..	Y							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	
							15,951.13	**12,229.23**	**15,951.13**																		
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	
							5,931.81	**4,745.46**	**5,931.81**																		
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	11,097.39	0.00					NA		2015997	N	NA						INVENTORY ASSET INITIAL EVENT	7/10/2023	TAGGABLE	

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	Untagable 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

Exporting Data

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	974... WA... PAL...																							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
										12,105.21	**0.00**	**12,105.21**													
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/...						ONLINE PHYSICAL	7/1
										53,686.96	0.00	0.00				NA								ONLINE PHYSICAL	7/1
										53,686.96	**0.00**	**53,686.96**													
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
										9,780.29	**0.00**	**9,780.29**													
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	4/30/20...		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
										21,042.50	**0.00**	**21,042.50**													

Export menu:
- Formatted
  - Data ▸
- Excel
- CSV
- Tab Delimited
- XML

Print - Export

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

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

Filtering Data

Includes both SFA and FA financial data
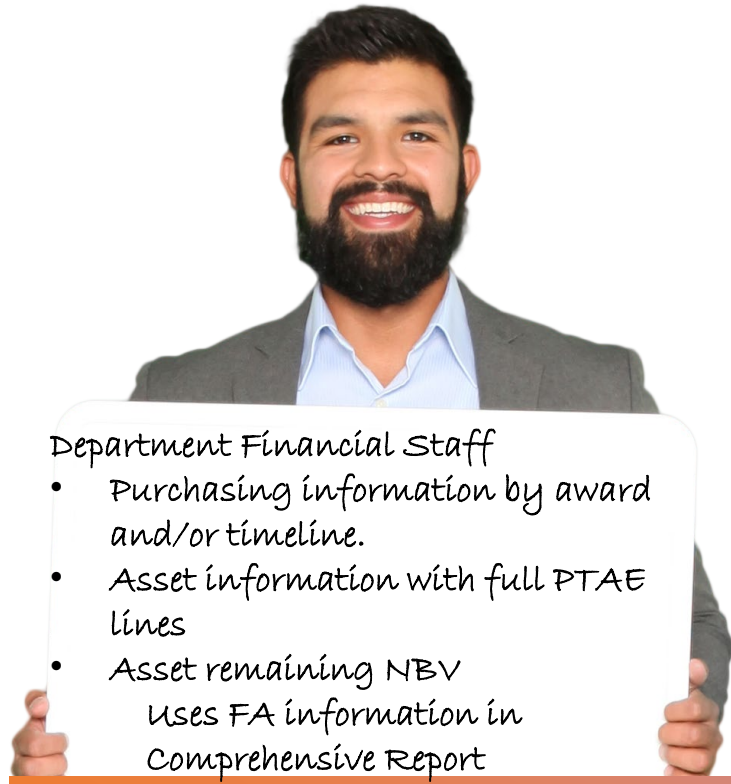
SFA data only = N
FA data only = Y

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

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!

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

SPARC Tagged Excess Request Enhancements

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

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.

SPARC Tagged Excess Request Enhancements

tems

🔍⌄ [   ] | Go | Actions ⌄

☐ **Tag Number**

☐ 0678742

Description

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

Reminders

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It is PMO policy for the approving DPA to tag and record that Capital Equipment.

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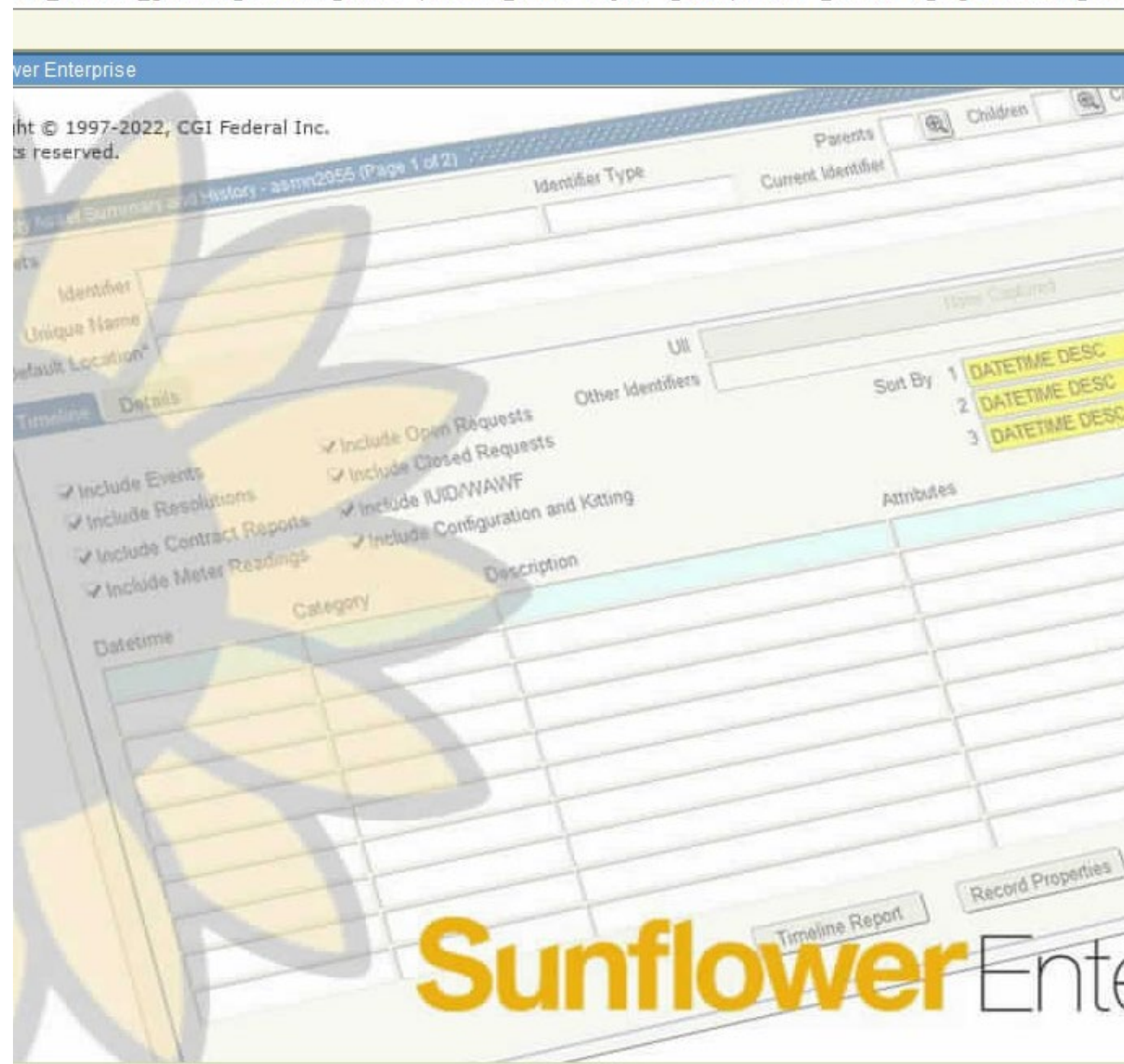
Allocation of PO lines to record

Capital equipment or system

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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

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-5010
Self-paced introduction to creating a Capital Cost Transfer in SPARC.

PMO-1000
DPA Certification class – in person, two morning class - Zoom June 18 & 19, 2024.

PMO-2000
DPA review and refresher class, single session, via zoom October 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

Thank You for Attending!

Next PACE Meeting

October 17, 2024

PMO-3000 in STARS