



Eagle Eye

newsletter from your Asset Management team.

2022 | Issue: 24

Special Edition - REQUISITIONS

Let's Start at the Very Beginning....

Did you know?—Asset ID information is generated from the information provided in purchase orders. If you are trained in ePro, you can save yourself time conducting inventory maintenance by including additional information within your requisitions. If you do not place orders for your department, consider working closely with the person who does... More information up front = cleaner reports and streamlined inventory practices.

In the initial setup of a requisition, you will land on this screen:

Shipping Defaults

Ship To: **A** Add One Time Address **C**

Due Date: Attention: **D**

Distribution Defaults

SpeedChart:

Accounting Defaults Personalize | Find | |

Chartfields1 | Details | Asset Information

Dist	Percent	Location B	GL Unit	Account	Alt Acct	Dept	Fun
1	<input type="text"/>	<input type="text" value="LIFE A114"/> <input type="button" value="Q"/>	<input type="text" value="NT752"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>	<input type="text"/> <input type="button" value="Q"/>

A – “Ship To” is the location the vendor will ship the order to. Any assets should automatically go to USB 135 (central campus receiving) or NTRP H142 (Discovery Park receiving) for tagging by Asset Management prior to delivery. **All assets (controlled or capital) are considered restricted items, and must be purchased via requisition** (please see Procurement’s [P-Card Program Guide](#) for more info).

B – “Location” is the specific place on campus Asset Management will delivery your orders to. This field is very important for ensuring your orders don’t go to the wrong place! In most cases, this field will default to your office. The Location field also has another key purpose—inventory location. If you know the inventory location upon placing the order, you can enter it for a specific line. Otherwise, you will have to wait until the order has been placed, delivered, paid, and processed for inventory before making such updates. If you do not know the building mnemonic, click the magnifying glass to search by description. ****NOTE: The Location field does not affect the vendor shipping address.**

C – If your order is oversized or requires special handling by the vendor, you can set a specific delivery location for direct shipment. For these type of orders, assets can be tagged on site, rather than at the Central Receiving warehouse.

D – “Attention” specifies the point of contact for delivery.

THESE FIRST STEPS ARE CRUCIAL IN PROPER FINAL DELIVERY OF YOUR ITEMS

With over 65% of the requisitions being incorrect and/or incomplete as seen at Central Receiving, this 'special edition' Eagle Eye focuses entirely on the requisition.

We continue to find that many problems with the requisition, purchase, receiving, inventory control and maintenance of an item may have been avoided in the beginning, if the requisition would have been properly completed with as much information as possible.

Thank you to Ryan for putting this together last year to help us all be more efficient in the requisition process.

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Next....

After completed the initial setup of your requisition, you will reach the checkout screen:

*Ship To: USB 135
Address: UNT Central Receiving, 2310 N. I-35E, Denton, TX 76205
Attention To:
Due Date:
Quantity: 1.0000
Price: 0.0000
Price Adjustment
Pegging Inquiry
Pegging Workbench
Custom Fields

Accounting Lines
*Distribute By: Qty
SpeedChart

AM Business Unit	Profile ID	Tag Number	CAP #	Sequence	Empl ID
NT752	204				F

E – “Profile ID” is a little-known tool that has significant potential for inventory coordinators. This field is typically generated automatically from the [Category Code](#), and provides a way to sort inventory items by type. If you wish to review the Profile ID for accuracy, you can find it under the **Accounting Lines** dropdown menu in the **Asset Information** tab. When searching for inventory items in EIS, you can utilize the assigned ID to look for a list of all your computers, vehicles, microscopes... anything!

Find an Existing Value

Search Criteria

Business Unit:
Asset Identification: begins with
Tag Number: begins with
Department: begins with
Serial ID: begins with
Description: begins with
Asset Status: =
Asset Profile ID: begins with 204
Location Code: begins with
Custodian EmplID: begins with
Custodian: begins with
Custodian EUID: begins with

This Asset is Offsite
 Include History Case Sensitive

Search Clear Basic Search Save Search Criteria

SHARE 203	SERVERS
SHARE 203L	LEASED SERVERS
SHARE 204	COMPUTER,DESKTOP
SHARE 205	PERIPHERAL DEVICES MICROCOMPU
SHARE 208	PRINTERS
SHARE 208L	LEASED PRINTERS
SHARE 209	TERMINAL,MONITOR
SHARE 210	DO NOT USE
SHARE 213	COMPUTER HARDWARE OTHER

F – “Empl ID” is the custodian the (single) asset on a particular line will be assigned to. Yes—that means you can enter it before the item is even delivered! Once the asset appears on your inventory, this info will already be assigned, and no further action is required.

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Lastly....

Category Codes are an important part of the procurement process. As the name suggests, the codes are split items into categories which determine D-Level/5-digit accounts and Profile ID assignments (discussed earlier). The codes also serve one other purpose—asset identification. Certain codes automatically flag items for inspection and tagging in the receiving process. If a non-asset code is used for a controlled/capital item, it may bypass the inspection process, causing it to not appear on your inventory.

If you submit ePro requisitions for your department, these codes can be entered into each line by clicking the name of the item in the checkout phase. You may be wondering, how do I know which code to use? EIS has a built-in search function, but it is strongly recommended that you use the [Category Tool](#) for reference, available on the [System Procurement Website](#). This spreadsheet provides much more info, including examples of which kinds of items fall under each category. If your requisition has multiple lines that are all part of one main capital asset system, the same code may be used for each line.

****NOTE: Requisitions using grant funds may have specific category code requirements. Contact System Purchasing for more information.**

Category codes are reviewed by the **University Budget Office** as part of the requisition approval process. For questions on which codes to use, please contact Asima Chauhan (asima.chauhan@unt.edu).

The image shows two screenshots from a procurement system. The left screenshot shows a 'Requisition Lines' table with one line item: 'Computer, Apple MacBook Pro' with a quantity of 1 and a supplier of 'Apple Computer Inc'. The right screenshot shows a 'New Requisition' form with the same item details, and the 'Category' field is set to '204-52'. A red arrow points from the item name in the first screenshot to the 'New Requisition' form in the second.

898-01	Hazardous Equipment less \$5000 Each	Any individual Hazard Equipment Item Less than \$5000 Each. Requisitions automatically ro Equip Cont
037-52	Promotional Items	Items (not clothing) that contain promotional information or used in a promotional activit Equip Expn
040-00	Animals live less \$5000	Any individual live Animal less than \$5000 Each Equip Expn
200-10	Non Uniform, T-Shirts	Clothing purchased and given to individuals, not returned. Usually promotional in nature Equip Expn
204-64	Computer Parts	Any individual Computer part Item less than \$5000 Each. Includes cables and memory stor Equip Expn
204-68	Computer Related Equip-Less \$5000	Includes Monitors, Keyboards, Sound bars, and Servers if under \$5000. Does not include T. Equip Expn
280-20	Software less than \$100,000	Software Purchase less than \$100,000. Does not include site license or maintenance Equip Expn
330-01	Furniture or Equipment Parts Less \$5000	Any individual Furniture or Equipment Part Less than \$5000 Each. Equip Expn
334-06	Furniture or Equipment Less \$5000, include Lab Equipment	Includes any individual Furniture or Lab Equipment Item Less than \$5000 Each. Does NOT ii Equip Expn
715-01	Books or Reference Material	Book or reference material under \$5000 each for department collection, not University Lib Equip Expn
715-10	Subscriptions, Periodicals	Includes Books, Periodicals, Microfilm hard copy - not electronic. Includes Library Loan Fe Equip Expn
725-55	Telecom Equipment Less \$5000	Any individual Telecom Item less than \$5000 Each Equip Expn
725-59	Telecom Equipment Parts Less \$5000	Any individual Telecom Parts less than \$5000 Each Equip Expn
850-45	Fabrics and Linens	Includes bulk fabric, table cloths and towels. Does not include Cleaning Services of these Equip Expn

Inventory 101 - Knowing what you got and where it's at.....at all times!

ASSET MANAGEMENT

<https://assetmanagement.unt.edu/>
email - Asset.Management@unt.edu

**Central Receiving
(UNT main campus)
2310 N. Interstate 35E
Denton, TX 76205
940-565-2391**

**Central Receiving
(Discovery Park)
3940 N. Elm, H142
Denton, TX 76207
940-565-4680**

**Surplus Warehouse
925 Precision Drive
Denton, TX 76207
940-369-7199**

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