Welcome!

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

- Total Trained
- Primary DPA
- Back up DPA
- Non-DPA
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

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/](https://www.gazelle.com/) or [https://ebay.com](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 3rd 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 3rd Party movers
  - If using a 3rd 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 affect 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
Reconciled Acquisitions

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

Total Dollars Posted by Last Update Date - As of Aug'23

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Dollars</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY2019</td>
<td>$68,050,646</td>
</tr>
<tr>
<td>FY2020</td>
<td>$63,180,936</td>
</tr>
<tr>
<td>FY2021</td>
<td>$82,993,933</td>
</tr>
<tr>
<td>FY2022</td>
<td>$70,018,277</td>
</tr>
<tr>
<td>FY2023</td>
<td>$69,401,025</td>
</tr>
</tbody>
</table>
Capital Cost Transfer – Metrics & Updates

**Metrics**
- 405 were successfully uploaded
- 40 were rejected and returned to originator
- 1 Failed
- 460 CCTs were created since May 2022
- 4 currently awaiting uploading at this time.

**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)
### SPARC Excess Requests FY23 - by category

<table>
<thead>
<tr>
<th>Category</th>
<th>Requests</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computers (all)</td>
<td>5963</td>
<td>34%</td>
</tr>
<tr>
<td>AV Equipment</td>
<td>503</td>
<td>3%</td>
</tr>
<tr>
<td>Monitors (all)</td>
<td>2207</td>
<td>13%</td>
</tr>
<tr>
<td>Office Equipment</td>
<td>1088</td>
<td>6%</td>
</tr>
<tr>
<td>Scientific/Lab Equipment</td>
<td>1723</td>
<td>10%</td>
</tr>
<tr>
<td>Machinery/Tools</td>
<td>214</td>
<td>1%</td>
</tr>
<tr>
<td>Non-Monitor Peripherals</td>
<td>2892</td>
<td>17%</td>
</tr>
<tr>
<td>Other</td>
<td>879</td>
<td>5%</td>
</tr>
<tr>
<td>Tagged</td>
<td>1902</td>
<td>11%</td>
</tr>
</tbody>
</table>

**Total Dispositions:** 19020
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

- 07: 1903 items, 11%
- 08: 4563 items, 26%
- 14: 1772 items, 10%
- 02: 1059 items, 6%
- 03: 482 items, 3%
- 06: 737 items, 4%
- 05: 11 items, 0%
- 09: 101 items, 1%
- 10: 150 items, 1%
- 01: 986 items, 6%
- 04: 11 items, 0%
- 03: 737 items, 4%
- 06: 4563 items, 26%
- 07: 4563 items, 26%
- 08: 4563 items, 26%
- 14: 1772 items, 10%
Reuse Furniture Program

- 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

- 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 POLLEVV!

Let's hear from you!

In your Internet Browser
Pollev.com/kimkaehler190
<table>
<thead>
<tr>
<th>Training Topic</th>
<th>Interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unmatched tips and tricks</td>
<td>0%</td>
</tr>
<tr>
<td>Capital Cost Transfers</td>
<td>0%</td>
</tr>
<tr>
<td>Physical Inventory Preparation Training</td>
<td>0%</td>
</tr>
<tr>
<td>Advanced DPA class (focused on research policy and procedures)</td>
<td>0%</td>
</tr>
<tr>
<td>Property Professional Development</td>
<td>0%</td>
</tr>
<tr>
<td>Disposition Process, Roles and Responsibilities</td>
<td>0%</td>
</tr>
<tr>
<td>Promoting Property Awareness</td>
<td>0%</td>
</tr>
<tr>
<td>DPA Review and Approval Process</td>
<td>0%</td>
</tr>
</tbody>
</table>
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:

- In-Person Meeting: 0%
- Virtual Meeting: 0%
- Combination of both: 0%
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.
This box will pop up, it is called the allocation box. To add a line item, click the small box to the far left of the line.
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.
You can reduce the allocation box by clicking the arrow in the blue header.
Now you have full view of your form. Fill out the form as usual.
When your record is complete, click the blue disc icon at the top left of the ribbon to save.
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.
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.
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.
With an empty Allocation Box, select another line item and continue the record creation(s).
In another example, this PO has 5 identical systems that will need 5 records.
Here lines 1, 3 and 4 have been selected for the first record. Click Allocate and complete the record.
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.
Please select Asset Life Status before running the Report.
You may enter more Parameter Values to narrow the search.
**STANFORD UNIVERSITY**

**Comprehensive Dashboard**

- **User ID:** kkaehler
- **Database:** DW2_PRD
- **OF1PRD**

**Parameters:**

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept Name</td>
<td>Select Value</td>
</tr>
<tr>
<td>Dept Code</td>
<td>Select Value</td>
</tr>
<tr>
<td>Steward/Parent Org</td>
<td>Select Value</td>
</tr>
<tr>
<td>SUID Tag Number</td>
<td>Select Value</td>
</tr>
<tr>
<td>Description</td>
<td>Select Value</td>
</tr>
<tr>
<td>Untagable Indicator</td>
<td>Select Value</td>
</tr>
<tr>
<td>Asset ID Number</td>
<td>Select Value</td>
</tr>
<tr>
<td>Project Number</td>
<td>Select Value</td>
</tr>
<tr>
<td>Task Number</td>
<td>Select Value</td>
</tr>
<tr>
<td>Award Number</td>
<td>Select Value</td>
</tr>
<tr>
<td>PO/ACQ Doc Identifier</td>
<td>Select Value</td>
</tr>
<tr>
<td>Quad Number</td>
<td>Select Value</td>
</tr>
<tr>
<td>Bldg Floor</td>
<td>Select Value</td>
</tr>
<tr>
<td>Room Number</td>
<td>Select Value</td>
</tr>
<tr>
<td>Parcel Number</td>
<td>Select Value</td>
</tr>
<tr>
<td>Street Address</td>
<td>Select Value</td>
</tr>
<tr>
<td>Agreement Number</td>
<td>Select Value</td>
</tr>
<tr>
<td>Acquisition Method</td>
<td>Select Value</td>
</tr>
<tr>
<td>User Name</td>
<td>Select Value</td>
</tr>
<tr>
<td>Custodian Name</td>
<td>Select Value</td>
</tr>
<tr>
<td>DPA Name</td>
<td>Select Value</td>
</tr>
<tr>
<td>Accountable SPO Number</td>
<td>Select Value</td>
</tr>
<tr>
<td>Asset Life Status</td>
<td>Active</td>
</tr>
</tbody>
</table>

**Filter Options:**

- **Acquisition Date:** Between 09/01/2020 and 10/23/2023

**Additional Information:**

Please select Asset Life Status before running the report. You may enter more Parameter Values to narrow the search.
**Formatted Data**

Can still be exported to .xlsx
### Report Data Arrangement
- from right to left

<table>
<thead>
<tr>
<th>SUID Tag Number</th>
<th>Description</th>
<th>Manufacturer/Name</th>
<th>Model Number</th>
<th>Serial Number</th>
<th>Year of Inv.</th>
<th>Owner</th>
<th>Org Code</th>
<th>Dept Name</th>
<th>DPA</th>
<th>Custodian</th>
<th>Service Center indicator</th>
<th>IDC Flag</th>
<th>Building Name</th>
<th>Quad</th>
<th>Building Floor</th>
<th>Room</th>
<th>Street Address</th>
<th>Parcel Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>7266818 PROFILER</td>
<td>NANOSTRING TECHNOLOGIES</td>
<td>NCT-SPRINT DEMO</td>
<td>1512P03586</td>
<td>2016</td>
<td>STANFORD UNIVERSITY</td>
<td>WAZB</td>
<td>Biogenix: Eva S.</td>
<td>COLC, John A.</td>
<td>Unassigned</td>
<td>Y</td>
<td>UNALLOCATED</td>
<td>07 - MEDICAL CENTER</td>
<td>500-00</td>
<td>0120</td>
<td>260 CAMPUS DR</td>
<td>STANFORD</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

### 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

### Asset History
- Fleet ID, Last Inventory Resolution/Date, Untaggle indicator, PMO Due Date, Status, Condition, Final Event Information and Retirement, Attachment Codes
Equipment Fabrications

- Request and Completion forms available on the PMO website
  - 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
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.

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