PMO General Updates

- Campus Support Team and Department Realignments
  - In Process, anticipate complete transition within FY22
  - Focus on maintaining effective service levels
  - Emphasis on cross-training and continued staff development

- PMO Website Transition in process

- Enhancing resources, property awareness, and educational/training delivery strategies
  - Implement new online tools
  - Future projects include several addressing specialized research administrator/research DPA, new faculty/PI welcome, and new DPA supervisor outreach.
Campus Support Team Realignment Update

Transition Continues
• SoM, DoR, H&S Departments among those transitioned

No Interruption of Service Noted

Last transition takes place in June 2022
Welcome New DPAs!
January 2022 Class

Manuel Pulido
Julie Shih
Thomas McCarthy
Matthew Franzen
Rachel Lubrin
Nathan Villanueva
Natalie Darling-Cabrera
Elizabeth Jibuike
Bilge Kuckukdogan
Demirer
Joyce Tseng
Rudolfo Martinez
Xinmin Zhao
Gina Sakuri
A slack channel for DPA's to ask questions, network and share individual best practices. Will also include occasional announcements from PMO in addition to what is sent out via email.
Surplus Reminders

- SPARC is the primary communication portal for all disposals requiring physical collection and all sales

- Record retirements for any other reason goes through your Property Programs Manager (Transfer, Return to Mfr, Trade-in, etc.)

- Label your items with the orange excess label! This is a requirement!

- Large items (hoods, centrifuges, copiers) will be forwarded to UG2 for pickup

- Freezers will be forwarded to PSSI for pickup

- Third party (non-UG2) deliveries MUST be coordinated with Alex, Jimmy, or Magee
Computing Device Disposals

• Enhanced management and oversight of data devices at Stanford

• Disposal is part of this expanding effort

• Please include serial number of all data devices being disposed
Sales of Cell Phones

• We do not encourage the practice of selling smart phones or other data devices to departing staff. However, if your department insists...

• First steps for selling a mobile data device:

  • User can check eBay for prevailing price – this is usually very close

  • User contacts DPA and Dept. Mgt. to obtain approval for sale
    • Include review of current contracts and whether to release phone number
    • DPA provides S/N to Surplus to obtain price, user decides to purchase
    • DPA submits SPARC request, noting it is to conduct a sale and to whom
    • Surplus provides invoice
    • User submits payment
    • Surplus releases phone

(see next slide)
Sales of Cell Phones continued

Once the phone is sold and payment verified, the user must have the phone ‘disconnected’ from Stanford.

Steps to separate phone from Stanford:

- User removes iCloud (unlocking phone)
- User submits ServiceNow ticket to disconnect from MDM
  - VERY IMPORTANT - Failure to do this can cause major issues later!
- UIT removes all data (wipe/hard reset)
- UIT removes phone from all university accounts
- Additional ServiceNow ticket needed to release phone number
Risk Management Disposals – New Policy

• When placing a claim with Risk Management to replace damaged property, the item(s) must be sent to Surplus for the claim to be paid.

• The item must be intact (no cannibalization)

• Note in the SPARC Excess Request the claim number

• Surplus will collect the item, attempt to recoup any residual value and forward that to Risk Management to help offset costs
Capital Cost Transfers (CCT)

- A new application in SPARC is nearing completion! Testing is currently underway.

- Replaces the emailed “Cap-Template” or “Capital Cost Adjustment” forms.

- The rollout will include significant campus communication, as this will impact a broad swath of our campus community.

- Information, user guides, tutorials, and other reference material is being developed for publishing on the ORA web site and Fingate.

**GO-LIVE estimated early summer 2022**
Capital Template
Capital Transaction Adjustment
Capital Cost Transfer
Your Personal Dashboard

Expand to view Status of requests

### My Drafts

<table>
<thead>
<tr>
<th>Request Number</th>
<th>PO Number</th>
<th>Orig Request #</th>
<th>Created Date</th>
<th>Notes</th>
<th>Delete</th>
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</thead>
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<td></td>
<td>03/11/2022</td>
<td></td>
<td></td>
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<tr>
<td>163</td>
<td>62208914</td>
<td></td>
<td>03/11/2022</td>
<td></td>
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<tr>
<td>101</td>
<td>61101011</td>
<td></td>
<td>03/10/2022</td>
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</table>

### My Outstanding Requests

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<tr>
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<th>PO Number</th>
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<th>Created Date</th>
<th>Notes</th>
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<tbody>
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<td></td>
<td>03/11/2022</td>
<td></td>
<td>03/11/2022</td>
<td>In Progress</td>
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</tbody>
</table>

### My Revoked Requests

### My Completed Requests

- Requests for Financial Approval
- Requests for PMO Approval
Create PO Cost Transfer

Click the down arrow to display the search box
Create PO Cost Transfer

Begin typing and a list of PO numbers will appear below
Create PO Cost Transfer

Select the correct PO
Create PO Cost Transfer

Click Search
Complete General Information

Please fill out the form below. Fields marked with * are required.

### Request ID

116

### Contact Information

**Originator**
- **Name**: Stan Dunn
- **Email**: standunn@stanford.edu
- **Phone**: (650) 725-0081

**DPA**

If you don’t know your DPA, use the SPARC DPA Directory

### Collection Information

- **PO Number**: 62631120
- **Vendor Number**: 147667 (Sartorius Corporation)
- **Vendor Site**: BDHEMAACH
- **SU ID Tag Number(s) affected, if any (Optional)**:
- **Justification**: Justification is required, same as journals

*Auto-populates after first entry*

*Auto-populates from PO information*
Ready for new PTAE data entry

The credit lines fill in automatically

Now you can:

<table>
<thead>
<tr>
<th>Invoice Adjustment Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Original Invoice #</strong></td>
</tr>
<tr>
<td>9112251653</td>
</tr>
<tr>
<td>9112251653</td>
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<tr>
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<td>9112261691</td>
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</tbody>
</table>
Ready for new PTAE data entry

The credit lines fill in automatically

Now you can:

Add debit lines to split costs to multiple PTAE

---

### Invoice Adjustment Lines

<table>
<thead>
<tr>
<th>Original Invoice #</th>
<th>Original Invoice Distribution #</th>
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<th>Original Invoice Line</th>
<th>Original Invoice Line #</th>
<th>Invoice #</th>
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<th>Award #</th>
<th>Project #</th>
<th>Task #</th>
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<td>S115</td>
<td>06/20/2021</td>
<td>2,650.00</td>
<td>2,650.00</td>
</tr>
</tbody>
</table>
Ready for new PTAE data entry

The credit lines fill in automatically

Now you can:

- Add debit lines to split costs to multiple PTAE
- Mass Update all to a single new PTAE
Ready for new PTAE data entry

The credit lines fill in automatically

Now you can:

- Add debit lines to split costs to multiple PTAE
- Mass Update all to a single new PTAE
- Add individual PTAE to single lines
Ready for new PTAE data entry

Click the “Mass Update Debit PTAE” button

The most common change is to move all payment lines of a PO from one PTAE to another.
Mass Update (1:1 / PTAE:PTAE)

NOTE:
If you have lines that involve different ETs, such as warranties, maintenance agreements, or other non-capital items, change those individually first, then select “Update blank PTAE only” for this step.

Select the radio button “Update All” to capture all invoices.

Next enter the new Award, Project, Task Number, Expenditure type and original expenditure date.
Selecting PTA – Nested Data

1. Enter the Award Number.

2. The Project Number list of values will be limited to those in the selected award.

3. Likewise, the Task Number will be limited to those in the selected project.
Submitting the request

<table>
<thead>
<tr>
<th>Original Invoice #</th>
<th>Original Distribution Line #</th>
<th>Original Invoice Date</th>
<th>Invoice #</th>
<th>Upload Line Type</th>
<th>Award #</th>
<th>Project #</th>
<th>Task #</th>
<th>Exp Type</th>
<th>Exp Start Date</th>
<th>Exp End Date</th>
<th>Credit Amount</th>
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</thead>
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<td>08/18/2021</td>
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<td>53115</td>
<td>08/18/2021</td>
<td>126,610.26</td>
<td></td>
</tr>
</tbody>
</table>

- Save Changes if you want to return later
- Or, click Review Prior to Submit to continue
Final Review

Pre-Submission status. Review details prior to submitting for approval routing.

Note the Financial Approver. This is based on the individual with the approval authority for the account being debited, based on the debit amount – the person with the lowest dollar level authority above that amount is automatically populated.

Recommended: Let them know it is coming!
Final Submission

1. You now have the opportunity to add any notes (visible to approvers)
2. You can also go back to edit the request if needed
3. Once satisfied all is ready, click Submit

Once submitted, it will flow to the Financial Approver(s) Queue
Financial Approver – Email Notification
Financial Approval

Approving the Request

- Review originator, DPA, other details
- See summary of total paid by PTAE
- See original invoice lines being modified

Approve or reject entire request

OR

Approve/reject individual lines
Retrieving Non-Cap POs (or those >2 years old)

Open “Create PO Cost Transfer”

In the search field that appears type the PO number:

Click on Overnight Data Retrieval – tomorrow the PO will be available when you search again

The PO number entered is not available at this time. Please click on Overnight Data Retrieval and an overnight process will pull the data from AP.
Non-PO Capital Cost Transfers

Although there are policy prohibitions against the use of PCards and Reimbursements for capital acquisitions, we all know there are occasional circumstances that arise…

The application includes a means for creating a capital cost transfer request on any transaction that is not a Purchase Order.
Initiating a Non-PO Capital Cost Transfer

Begin with the same steps, entering DPA name.

You will need to look up the vendor (supplier) in the SU Inquiry Tools and Forms on the Oracle Financials (ofweb) landing page.

Enter the vendor number, then select pay site from the list of values.

Add tag number if known

Don’t forget the justification!
Select original transaction type

The credit and debit lines will need to be created from scratch – click “Add Line’ to begin.

A new row will be created, and you can select the type of transaction being modified: Invoice (ER), PCard, or iJournal.
Create Debit and Credit Lines

### Invoice Adjustment Lines

<table>
<thead>
<tr>
<th>Trx Type</th>
<th>Trx #</th>
<th>Award #</th>
<th>Project #</th>
<th>Task #</th>
<th>Exp Type</th>
<th>Exp Item Date</th>
<th>Credit Amount</th>
<th>Debit Amount</th>
</tr>
</thead>
<tbody>
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<td></td>
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</tbody>
</table>

1 rows selected  Total 2

[Save Changes]  [Review Prior to Submit]
Create Debit and Credit Lines

You may now **Save Changes** to complete later or click **“Review Prior to Submit”**
Create Debit and Credit Lines

As with other transactions, you will have a summary page to review where you can add notes, return to make edits, or submit the transaction for approval routing.
Coming Soon!

Be on the lookout for more information on Capital Cost Transfer in SPARC
OBI Reporting Project

• The development of the PMO subject area is in final stages and testing

• Next stage – development of reports in the shared file catalog

• Initial public reports available this summer, replacing the current comprehensive and award management reports (286/296)

• Additional reports (Unmatched/288, etc.) to follow
Use of PCards and Employee Reimbursements

• PCards and Employee Reimbursements are prohibited for capital acquisitions. There are numerous reasons for this, including federal regulatory compliance issues surrounding purchasing.

• **PLEASE** help ensure your staff (including faculty) are aware of this policy.

• Repairing a capital purchase via PCard is very difficult:
  • Oracle requires an active vendor for capital transactions
  • Non-approved vendors make APINV uploads impossible
  • Alternative processes are very time-consuming
  • Lack of solid audit trail invites added scrutiny
Revenue Accounts

- Service Centers and University Affiliates (HHMI, SLAC, Carnegie) operate on revenue accounts. Supplies, salaries, and other non-capital expenses are all managed through these accounts.
- Capital transactions are not permitted on revenue accounts.
- Typically, these accounts begin with ACxxx thru ALxxx, or ATxxx.

- Capital purchases must be made with unrestricted department funds and paid back, or funding arranged through Capital Planning and Management (CP&M). The capital cost will be amortized based on the depreciable life of the asset(s) and paid back on that schedule.

See the Fingate and DoResearch web sites for further details.
Property System Audits

• Property Management Systems Analysis (or Assessment)
  • Performed by Office of Naval Research Contracting Officer
  • Estimated dates – latter part of July
  • May assess all property processes applicable to selected sample
  • Sample selected from ONR-Administered Awards
  • Limited review due to volume of Federally-Owned property on ONR-Administered awards
    • We consistently strive to obtain title to reduce audit risk
  • Target outcome – continued acceptance of our Property Management System
Property System Audits, continued

• FY21 Uniform Guidance Audit
  • Performed by PwC
  • Financial Compliance Audit – currently in process
  • Assess various property processes with emphasis on Acquisition, Records, Inventory, and Disposition
  • Includes review of Procedures, Physical verification, and Supporting Documentation Review
  • Samples selected from entire active record population
  • Target outcome – successful completion with no significant observations or findings
B23 Inventory Updates:

**Facilitated Scans**

- Law School
- Psychology
- Vice Provost for Undergraduate Education
- ChemH/Neuroscience Bldg
- Art History
- School of Engineering

**Upcoming Scanning Events**

- GLAM
- Libraries
- School of Earth Science
- LBRE
- Environmental Health and Safety
- Athletics
B23 Inventory Updates continued:

Federal Inventory
- Moved from June to September.
- Scan facilitated September 6-9, 2022

New Scanner Guns in testing phase
- Android Operating System
- Will eventually replace scanners currently in use

B23 Year Two Scanning Schedule
- Begins August 2022
  - Chemistry
  - SoM Off-Campus
  - SoM Main Campus
Custodian and Catalog Clean-Up Projects

Projects Facilitated by the Inventory Team
• Both projects to be facilitated over a long period of time

Custodian Clean-Up
• Facilitated by Jose Medina
• Involves working with DPA to update assets records where custodians who are no longer affiliated with University
• Jose will be developing a process and will be reaching out

Catalog Clean-Up
• Facilitated by Jose Plascencia
• Addresses long standing need with the SFA Catalog
• Multi-step process which will begin with investigating Manufacturers and will eventually expand to other areas such as Description and model.
PMO Website Update

- URL: https://ora.stanford.edu/ora-units/property-management-office

- Website Pages Include:
  - Property Management Manual
  - Team Members
  - Campus Support Team
  - Surplus Property Sales
  - Training
  - Forms and Documents

- Continued Site Development And Pages Expected
UPCOMING TRAINING EVENTS

PMO-1000 – DPA Certification Modules I and II
June 8 – 9, 2022 via Zoom – ½ day sessions

PMO-2000 – DPA Refresher Course
July 26, 2022 via Zoom – ½ day session

PMO-4000 – NEW!! Advanced Research Course
Coming soon!
National Property Management Association

2022 NATIONAL EDUCATION SEMINAR (NES)

- STAP Funds Eligible!
- In-person only, no virtual option

Focus Area Sessions:
- Best Practices and Innovations
- Date Management and Records
- Inventory Management
- Property Accounting and much more
Thank You for joining us today

Questions or Comments?