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
- B2S 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 Trinidad
- 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

• Importance of 30 Days receipt to record
  o Affects Inventory Process
  o Non-timely identification and recording allows potential for equipment to go missing
  o Creates more work for DPA and PMO
• Don’t Wait, Be Proactive
• Communicate with your PPM
  o 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.
<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total lease term commitment over one year.</td>
<td>Total financial commitment over $5000</td>
</tr>
<tr>
<td>Lease with a term under one year, with an option to renew</td>
<td></td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>52910</td>
<td>LEASE EQUIPMENT &gt;1yr; &lt;$5K</td>
<td>Less than $5K commitment, Greater than one year</td>
</tr>
<tr>
<td>52921</td>
<td>LEASE GEN PURPOSE EQUIP &gt;$5K</td>
<td>$5K+ commitment, Greater than one year, Non-research equipment</td>
</tr>
<tr>
<td>52951</td>
<td>LEASE SPEC PURPOSE EQUIP &gt;$5K</td>
<td>$5K+ commitment, Greater than one year, Research equipment</td>
</tr>
<tr>
<td>52981</td>
<td>LEASE EQUIP. 1 MO TO 1 YEAR</td>
<td>Greater than one month but less than one year, and $ commitment</td>
</tr>
<tr>
<td>52992</td>
<td>RENT OTHER</td>
<td>&lt;1 MO or other rental</td>
</tr>
</tbody>
</table>
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
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
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.


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
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept Code</td>
<td>WAZB</td>
</tr>
<tr>
<td>Acquisition Date</td>
<td>10/23/2023</td>
</tr>
<tr>
<td>Asset Life Status</td>
<td>Active</td>
</tr>
</tbody>
</table>

Please select Asset Life Status before running the Report. You may enter more Parameter Values to narrow the search.
<table>
<thead>
<tr>
<th>Building Floor</th>
<th>Room</th>
<th>Street Address</th>
<th>Parcel Number</th>
<th>Acquisition Date</th>
<th>Acquisition Method</th>
<th>PO/Account Number</th>
<th>SPA Acq Amount</th>
<th>Net Book Value</th>
<th>FA Distribution Amount</th>
<th>Percent Breakdown</th>
<th>Project Phase</th>
<th>Task</th>
<th>Award</th>
<th>Expenditure Type Code</th>
<th>Award End Date</th>
<th>Fixed Asset ID</th>
<th>Fixed Asset Tracking</th>
<th>Fixed Asset Tracking Seq</th>
<th>SPO Number</th>
<th>Accountable SPO Number</th>
<th>Asset Agreement Number</th>
<th>PMO Audit Code</th>
<th>Sponsor Tag Number</th>
<th>Fleet ID Number</th>
<th>Last Inventory Resolution</th>
<th>Last Inventory Date</th>
<th>Untaggable Indicator</th>
<th>PMO Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>590-00</td>
<td>0120</td>
<td>269 CAMPUS DR</td>
<td>142-05-045</td>
<td>9/30/2022</td>
<td>PURCHASE</td>
<td>029520500</td>
<td>0.00</td>
<td>0.00</td>
<td>42,075.00</td>
<td>100.00%</td>
<td>1126741</td>
<td>800</td>
<td>XABC</td>
<td>53115</td>
<td>8/31/2035</td>
<td>1870981 Y</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>BARCODE SCAN</td>
<td>3/10/2023</td>
<td>TAGGABLE 515</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>097-01</td>
<td>1208</td>
<td>3165 PORTER DR</td>
<td>142-18-043</td>
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<td>PUIQ</td>
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<td>9/19/2022</td>
<td>1950980 Y</td>
<td>189707</td>
<td>INVENTORY ASSET INITIAL EVENT</td>
<td>11/23/2022</td>
<td>TAGGABLE</td>
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<tr>
<td>590-00</td>
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<td>269 CAMPUS DR</td>
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<td>8/31/2035</td>
<td>1924990 Y</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>INVENTORY ASSET INITIAL EVENT</td>
<td>9/21/2022</td>
<td>TAGGABLE</td>
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<td></td>
</tr>
<tr>
<td>590-00</td>
<td>0120</td>
<td>269 CAMPUS DR</td>
<td>142-05-045</td>
<td>8/8/2022</td>
<td>PURCHASE</td>
<td>02804569</td>
<td>0.00</td>
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<td>5,931.81</td>
<td>100.00%</td>
<td>1126741</td>
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<td>1924990 Y</td>
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<td>NA</td>
<td>NA</td>
<td>INVENTORY ASSET INITIAL EVENT</td>
<td>11/23/2022</td>
<td>TAGGABLE</td>
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<tr>
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<td>NA</td>
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<td>7/10/2023</td>
<td>TAGGABLE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**FORMATTED REPORT DATA**
## Report Data Arrangement
- from left to right

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

<table>
<thead>
<tr>
<th>SUID</th>
<th>Tag</th>
<th>Description</th>
<th>Manufacturer</th>
<th>Model Number</th>
<th>Serial Number</th>
<th>Year of Mfr</th>
<th>Owner</th>
<th>Org Code</th>
<th>Dept</th>
<th>DPA</th>
<th>Customer</th>
<th>User</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>7246631</td>
<td>PROFILER</td>
<td>HANDSTRING TECHNOLOGIES</td>
<td>NCT-SPRINT DEQUI</td>
<td>1512P0358</td>
<td>2016</td>
<td>STANFORD UNIVERSITY</td>
<td>W28</td>
<td>WADZ - Genetics</td>
<td>070</td>
<td>Genome Center</td>
<td>Colleen John A</td>
<td>Unknown</td>
<td>Y</td>
<td>UNHALLOW</td>
<td>070-05 CENTER FOR CLINICAL SCIENCES RESEARCH</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### 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**

<table>
<thead>
<tr>
<th>Acquisition Number</th>
<th>Acquisition Method</th>
<th>PO/Acq Doc Identifier</th>
<th>KSA Acq Amount</th>
<th>Net Book Value</th>
<th>FA Distribution Amount</th>
<th>Percent Breakdown</th>
<th>Project</th>
<th>Task</th>
<th>Award</th>
<th>Expenditure Type Code</th>
<th>Award End Date</th>
<th>Fixed Asset ID Number</th>
<th>Fixed Asset Invoice Flag Indicator</th>
<th>SPO Number</th>
<th>Accountable SPO Number</th>
<th>Asset Agreement Number</th>
<th>PMO Audit Code</th>
<th>Sponsor Tag Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>0320022</td>
<td>PURCHASE</td>
<td>629625256</td>
<td>0.00</td>
<td>0.00</td>
<td>42,075.00</td>
<td>100.00%</td>
<td>1226471</td>
<td>800</td>
<td>4461A</td>
<td>53115</td>
<td>8/10/2035</td>
<td>1870981</td>
<td>Y</td>
<td>NA</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>42,075.00</td>
<td>33,669.00</td>
<td>0.00</td>
<td>NA</td>
<td>1870981</td>
<td>N</td>
<td>NA</td>
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</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Fleet ID</th>
<th>Number</th>
<th>Last Inventory Resolution</th>
<th>Last Inventory Date</th>
<th>Untaggable Indicator</th>
<th>PMO Due Date</th>
<th>Status</th>
<th>Condition</th>
<th>Final Event Date</th>
<th>Final Event Method</th>
<th>Final Event Method Description</th>
<th>Fixed Asset ID Number</th>
<th>FA Retirement Date</th>
<th>Cost at Retirement</th>
<th>Sales Property Sales Invoice Number</th>
<th>Attachments Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>BARCODE SCAN</td>
<td>3/15/2023</td>
<td>TAGGABLE</td>
<td>5/15/2018</td>
<td>IN SERVICE</td>
<td>GOOD CONDITION</td>
<td>-</td>
<td>0.00</td>
<td>D,A</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BARCODE SCAN</td>
<td>3/15/2023</td>
<td>TAGGABLE</td>
<td>5/15/2018</td>
<td>IN SERVICE</td>
<td>GOOD CONDITION</td>
<td>-</td>
<td>0.00</td>
<td>D,A</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
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<td></td>
</tr>
</tbody>
</table>

|
### Exporting Data

The Print/Export function is located 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

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

SFA data only = N
FA data only = Y
Who Uses What and Why?

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
# 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 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.
<table>
<thead>
<tr>
<th>Tag Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>0678742</td>
<td>CART</td>
</tr>
</tbody>
</table>

**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
- Select Review Prior to Submit and Submit as usual
<table>
<thead>
<tr>
<th>Approving Requisitions/tagging and record entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Possible reasons a PO is not available in the PO Interface</th>
</tr>
</thead>
<tbody>
<tr>
<td>The PO has not been received in iProcurement (overnight refresh to flow into Interface)</td>
</tr>
<tr>
<td>The equipment on the PO was coded as non-capital</td>
</tr>
<tr>
<td>You have entered the wrong PO or there is a typo/extra space in the entry</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Allocation of PO lines to record</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital equipment or system</td>
</tr>
<tr>
<td>Accessories and/or start up supplies</td>
</tr>
<tr>
<td>Shipping, handling and vendor installation</td>
</tr>
</tbody>
</table>
### Approving Requests/tagging and record entry

It is PMO policy for the approving DPA to tag and record that Capital Equipment. 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
<table>
<thead>
<tr>
<th>Approving Requestions/tagging and record entry</th>
<th>Possible reasons a PO is not available in the PO Interface</th>
<th>Allocation of PO lines to record</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is PMO policy for the approving DPA to tag and record that Capital Equipment. 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.</td>
<td>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</td>
<td>Capital equipment or system Accessories and/or start up supplies Shipping, handling and vendor installation</td>
</tr>
</tbody>
</table>
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-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.
NPMA Educational Opportunities

- NES July 29-Aug 1, Reno, Nevada at the Peppermill Resort
  - Early Registration Rate in effect until June 3.
  - 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