Addition

Click on each area to expand the section:

Purpose

- This form exists for the purpose of inventory control for each department notifying the Inventory Control section of any asset additions through purchasing, gifting, or fabrication.

Web form:

1. To begin the DocuSign/RT process click here (link to be added after go-live)
2. Choose Inventory Addition in the Reason for Adjustment dropdown menu.
3. Click here to check the custodian for a department in the custodian list. You can also find this list by looking at the useful links on the top right of the DocuSign page.
4. After entering the names, look up the department by the department number or name. After selecting the department from the list, click the Next button.
5. The forms will populate with the necessary fields and prompt you with required fields. There may be attachments required. The link to add attachments can be found at the bottom of the form.
6. When complete, submit for approval.

Docusign Form

- Requires a purchase option
- Requires at least one attachment (supporting documentation: invoices/receipts, documentation from Institutional Advancement for donations)
- Requires a comment
- Requires a signature
- Requires you to put the following attributes for each piece of equipment
  - Item Description
  - Original cost
  - Purchase Date, in the format of MM/DD/YYYY (required for depreciation purposes)
  - Serial Number
  - Building
  - Room
  - Fund Code
  - Prog-Fin
  - Dept Code

Overall Process:

Inventory Control reviews the DocuSign addition form and supporting documentation. At the time they assign the tags, they will change the ticket status to “ready for pickup.” This automatically results in an email sent to the custodian, indicating their tags are ready. The email will have a link, which takes them to Asset Management’s child Google calendar, which will have available time slots. The custodian chooses a time and it automatically updates both calendars. The appointment will be added to the RT ticket. Any needed rescheduling or scheduling outside of the slots on the calendar will occur promptly and will be added as a comment on the RT ticket. Inventory Control has part-time custodians’ work schedules on hand to be sure the appointments are made when the custodians are available.

After the custodian picks up the tags, Inventory Control updates Asset Management in PeopleSoft. They then close the ticket.

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