



# FY23 Equipment Survey

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# Importance of the Equipment Survey

- ▶ Compliance with federal guidelines:
  - ▶ Annual Survey is required under Code of Federal Regulation Title 2 § 200.313
  - ▶ Agencies have right to audit UD's management of federally funded equipment, e.g. ONR audit August 2022
- ▶ Accurate record keeping:
  - ▶ Verifying equipment exists and is being used
  - ▶ Safeguarding of assets
- ▶ Financial reporting implications:
  - ▶ Functionalization of depreciation on financial statements, e.g. depreciation of a microscope in a lab allocated to Sponsored Research based on room coding

# Stewardship

- ▶ Departments are the stewards of the equipment assigned to them
- ▶ Webforms are required when there is a change to the asset
  - ▶ Active/Inactive
  - ▶ Location Change
  - ▶ Change of department
  - ▶ Selling or removing an asset
- ▶ All assets require an attached UD Tag
  - ▶ Tags should be printed from Tagging Webform and affixed to the equipment
  - ▶ Contact Asset Management if it cannot be attached

# FY23 Equipment Survey

- ▶ Appropriate departmental contacts were confirmed by the Asset Management Team between March 22<sup>nd</sup> and April 7<sup>th</sup>
- ▶ Surveys distribution April 10<sup>th</sup>
- ▶ Surveys need to be returned by May 5<sup>th</sup>
  - ▶ All updates will need to be recorded in Webforms by May 5, 2023

# Steps to Complete the Equipment Survey

- 1) Review the Equipment Inventory Listing (see slides 7-11).
- 2) Complete any necessary Equipment Activity Webforms (see slides 12-14).
- 3) Return the completed Equipment Inventory Listing to the Asset Management Team by email at [asset-mgmt-survey@udel.edu](mailto:asset-mgmt-survey@udel.edu) by 05/05/2023.

# Equipment Inventory Listing

Dept	Department Name	Tag #	Tag Descr	Acq Dt	Building	Building Name	Floor #	Tag Serial Num	Model #	End User	Profile ID	Descr	Room Status	Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
EX01	Example	206454	Example 1	1/1/2013	NN05	Example	0325	ABC	A	M. Rothfuss	0008419664	TABLE, WORK	A	<input type="checkbox"/>					
EX02	Example	203173	Example 2	3/20/2013	NN05	Example	0653	DEF	B	M. Rothfuss	0008947434	TABLE, WORK	A	<input type="checkbox"/>					
EX03	Example	204791	Example 3	6/27/2013	NN05	Example	0441	GHI	C	M. Rothfuss	0006209459	TABLE, WORK	A	<input type="checkbox"/>					
EX04	Example	200278	Example 4	10/20/2015	NN05	Example	0150	JKL	D	M. Rothfuss	0006805362	TABLE, WORK	I	<input type="checkbox"/>					
EX05	Example	200321	Example 5	4/27/2017	NN05	Example	0565	MNO	E	M. Rothfuss	0009988363	TABLE, WORK	I	<input type="checkbox"/>					
EX06	Example	205222	Example 6	5/4/2017	NN05	Example	0766	PQR	F	M. Rothfuss	0006050830	TABLE, WORK	A	<input type="checkbox"/>					
EX07	Example	217639	Example 7	1/28/2020	NN05	Example	0716	STU	G	M. Rothfuss	0006339646	TABLE, WORK	I	<input type="checkbox"/>					
EX08	Example	212982	Example 8	2/3/2020	NN05	Example	0693	VWY	H	M. Rothfuss	0000615504	TABLE, WORK	A	<input type="checkbox"/>					
EX09	Example	215630	Example 9	5/12/2020	NN05	Example	0161	YZ	I	M. Rothfuss	0008898829	TABLE, WORK	I	<input type="checkbox"/>					

- Departments will receive an Excel spreadsheet listing of their equipment.
- Any line highlighted in orange indicates a Webform must be submitted to update the room location because it is currently located in an inactive room.
- Data provided represents system records as of 3/31/2023.

# Reviewing Equipment Data

Dept	Department Name	Tag #	Tag Descr	Acq Dt	Building	Building Name	Floor #	Tag Serial Num	Model #	End User	Profile ID	Descr	Room Status	Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
Example1	Example	000101	Example 001	1/1/2013	NN05	Example	0111	ABC	A	M. Rothfuss	0000350785	TABLE, WORK	A	<input checked="" type="checkbox"/>					

Click the confirmation box to confirm data is correct

Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
<input checked="" type="checkbox"/>					

Click the confirmation box to confirm data is correct

- Review each line of data in the Equipment Inventory Listing.
- For all lines that are correct, click the confirmation box in column O. Data should represent status at time of survey completion.
- Any inaccurate data must be updated as described in the following slides.



# Updating Incorrect Data

Dept	Department Name	Tag #	Tag Descr	Acq Dt	Building	Building Name	Floor #	Tag Serial Num	Model #	End User	Profile ID	Descr	Room Status	Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
Example1	Example	000101	Example 001	1/1/2013	NN05	Example	0111	ABC	A	M. Rothfuss	0000350785	TABLE, WORK	A	<input type="checkbox"/>	STC11	0123		5551234	Updated location

If the record needs to be updated  
Please put updated information in cells P-R  
Go to Webform and fill out a relocation form  
Add Webform number into column S

Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
<input type="checkbox"/>	STC11	0123		5551234	Updated location

If the record needs to be updated  
Please put updated information in cells P-R  
Go to Webform and fill out a relocation form  
Add Webform number into column S

- Enter changes that need to be made in columns P-R.
- For each piece of equipment that needs to be updated, complete an Equipment Webform.
- Fill in Webform # in column S.

# Known Errors: Records Highlighted in Orange

Dept	Department Name	Tag #	Tag Descr	Acq Dt	Building	Building Name	Floor #	Tag Serial Num	Model #	End User	Profile ID	Descr	Room Status	Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
Example1	Example	000101	Example 001	1/1/2013	NN05	Example	0111	ABC	A	Michael Rothfuss	0000350785	TABLE, WORK I		<input type="checkbox"/>	NN05	0400		5555678	Updated Room

The record is in a room that is no longer active  
Please update location in cells P-R  
Complete a Relocation Webform  
Add Webform ID in Cell S

- All records that are highlighted in orange indicate inaccurate data.
- These must be updated via webform.
- Note the webform # as indicated above.

# Equipment: Inactive or No Longer in UD Possession

Dept	Department Name	Tag #	Tag Descr	Acq Dt	Building	Building Name	Floor #	Tag Serial Num	Model #	End User	Profile ID	Descr	Room Status	Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
Example1	Example	000101	Example 001	1/1/2013	NN05	Example	0111	ABC	A	M. Rothfuss	0000350785	TABLE, WORK	A	<input type="checkbox"/>				5555679	Junk

The equipment is no longer active or we no longer with UD highlight line red  
 Complete a corresponding Webform with correct reasoning (Junk, Sold, etc.)  
 Add Webform ID in Cell S  
 Add comment in Cell T with reasoning

Confirm	Updated Building	Updated Room	Updated End User	Webform #	Comments
<input type="checkbox"/>				5555679	Junk

The equipment is no longer active or we no longer with UD highlight line red  
 Complete a corresponding Webform with correct reasoning (Junk, Sold, etc.)  
 Add Webform ID in Cell S  
 Add comment in Cell T with reasoning

For any items that are no longer active:

- Highlight the line red
- Complete an Equipment Webform to remove the asset
- Fill in Webform # in column S
- Fill in comments in column T for reason for removal (see definitions in the Equipment Survey Instructions document for proper terminology).

# Equipment Activity Webform

The screenshot shows the top of the webform with the University of Delaware logo and the title 'EQUIPMENT ACTIVITY'. Below the title are links for 'Menu', 'Help', and 'Logout'. A paragraph of instructions follows, explaining the purpose of the form and providing contact information for tagged equipment. Two main sections are visible: 'Non-Tagged (non-capital) equipment' and 'Tagged (Capital) equipment'. The 'Tagged (Capital) equipment' section includes a list of actions with a drop-down arrow on the left of each item.

**UNIVERSITY OF DELAWARE**

**EQUIPMENT ACTIVITY**

[Menu](#) [Help](#) [Logout](#)

Use an appropriate option below to record changes in the status of equipment, and certify compliance of [policy 5-06](#) for digital media. The equipment cannot be disposed or relocated until the originator has received an approved copy of this form. Questions regarding tagged equipment should be directed to [Asset Management](#) at (302) 831-2175. For non-tagged equipment, contact Procurement Services at (302) 831-2161.

**Non-Tagged (non-capital) equipment**  
Equipment or materials without a tag number (generally under \$5,000).

Use the [Non-Tagged Equipment/Materials](#) form to record changes in the status of equipment.

**Equipment with digital media:** University policy requires that digital media (hard drives, flash drives, etc.) must be sanitized of all University information if it is to be reused by a non-University entity or another University department that has no need to know the University information. Before disposal, digital media must be completely sanitized of University information or destroyed using official University channels. You must certify compliance with [University policy 5-06](#).

**Tagged (Capital) equipment**  
Equipment or materials with a tag number (generally \$5,000 and greater). [More info](#).

Choose the appropriate action below to display more information.

- ▶ Disposal
- ▶ Location change
- ▶ New asset creation
- ▶ Loan
- ▶ Trade
- ▶ Funding change
- ▶ Transfer-in
- ▶ Gifts

- Access Equipment Webforms at [udapps.nss.udel.edu/webforms/embtform?wf\\_id=355&wf\\_ty=blank](https://udapps.nss.udel.edu/webforms/embtform?wf_id=355&wf_ty=blank)
- Click on the drop-down that best correlates with the record change

# Equipment Activity Webform Continued

## Tagged (Capital) equipment

Equipment or materials with a tag number (generally \$5,000 and greater). [More info.](#)

Choose the appropriate action below to display more information.

▼ **Disposal**

Choose one of the following disposal types to inactivate the equipment in your inventory. [See disposition definitions.](#)

Type of disposal: **Junk (JU)**

**Cannibalized (CA)**

**Stolen (CR)**  
(All thefts of University property must be reported to the University Police (831-2224). Attachment of University Police report is required for tagged equipment.)

**Permanent transfer off-campus (TO)**  
(A form using this option should not be started until all negotiations are final.)

**Sold (SO)**

For further information, refer to the following policies:

- Use and Disposal of University Equipment and Material (5-06)
- Class I Movable Equipment (5-10)
- Transfer of Equipment Purchased on Research and Training Contracts and Grants (6-08)

**Disposal of equipment with digital media:** Before disposal, University information must be completely removed from equipment with digital media in accordance with [policy 5-06](#). You must certify that any digital media has been completely sanitized of University information or destroyed using official University channels.

- Click on type of Equipment Webform to complete

# Equipment Activity Webform Continued

**EQUIPMENT ACTIVITY**

Menu Help Logout

Req ID: 5612336

**Action to be taken: Junk (JU)**

This form is used to record changes in the status of equipment. The equipment cannot be disposed or relocated until the originator has received an approved copy of this form. If you have any questions contact [Asset Management](#) at (302) 831-2175.

Symbol key: \* Required information, ! Error

Form originator

Originated by: Rothfuss, Michael (702667039)  
Controller's Office (04710)  
302-831-0251

Enter equipment tag number(s)

Valid equipment tags are at least six characters. If you have an older equipment tag with only five digits, enter a zero as the first number in the tag.

Tag number:

Supporting document

Attach supporting document: Use the Browse or Choose file button to locate the file(s) on your local drive. Note: All attached files on this page must total less than 31 MB.

No file chosen

Tag numbers associated with this attachment: Use Ctrl-Click (PC) or Command-Click (Mac) to choose more than one.

- Complete form
  - Multiple tags can be used on a single form
- Do not dispose of or relocate assets until the form has been approved
- Contact Asset Management for any questions

# Contact

Contact Asset Management at [asset-mgt@udel.edu](mailto:asset-mgt@udel.edu) with any questions.

Thank you for your participation in this important process!