

Texas A&M System

Annual Property Certification and Barcoding

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I. Policy

A. The annual certification of property is a process required for all state agencies. In accordance with Texas Government Code Ann. Sec. 403.273 and SPA Process User's Guide (revised December 2010), the Office of the Comptroller requires the following:

"(e) A state agency shall conduct an annual physical inventory of all property in its possession. The comptroller may specify the date on which the inventory must be conducted.

(f) Not later than the date described by the comptroller, the head of the state agency shall submit to the comptroller:

(1) A signed statement describing the methods used to conduct the agency's annual physical inventory under section (e);

(2) A copy for the results of the inventory; and

(3) Any other information concerning the inventory that the comptroller requires."

B. All Texas A&M AgriLife (AgriLife) departments must conduct an annual physical inventory and submit a report to the AgriLife Property Manager by the required deadline.
 <u>It is critical that each department meet the scanning and submittal deadlines so that AgriLife can meet the overall deadline imposed by the Comptroller.</u>

II. Incircuit Scan and Validate

AgriLife uses the web-based program, Incircuit Scan and Validate, in conjunction with hand-held scanners to manage the annual property inventory process.

A. Scanners

- 1. The scanners are set up on a first-come first-serve basis and are shared by the departments.
- 2. Annual certification will rotate throughout the fiscal year.
- 3. Schedules will be first come first serve basis with final time determined by the Property Manager.
- 4. The department is provided a user ID and password for use with the scanner and webbased program.
- 5. Preparations in advance are a must to set-up the scanner and scan departmental assets within the allotted time (scan time is usually 2-14 days, depending on the department's inventory size).
- 6. If for any reason a delay is expected, please contact the Property Manager and reschedule the scanner in order to keep the device in use with another department.

B. Scheduling Scanners

- 1. For on-campus departments, the scanner will be delivered to the department or can be picked up at the fiscal office, and is set up by the departments Business Office.
- 2. For urban offices, the scanner is shipped and will be setup via telephone with the Property Office to ensure proper program connections are made so that the scanner can properly synchronize with the web-based program, which is located at the following web address: <u>http://web3.incircuit.com/sv/login.cfm</u>.

III. Inventory Process

A. Scanning Inventory

- 1. Definitions and terms that are used in this Guide:
 - a. Sync Sync, also known as "Synchronize" refers to process of transferring data back and forth between the scanner and the Scan & Validate server. It is an automated process, and it is done by placing the scanner in the cradle and pressing the Sync button (the sync button shows, once the scanner has been installed) in the Scan & Validate application on the scanner.
 - b. Subset Scan & Validate allows property management to break the data down into groups for conducting the inventory. The scanner will be loaded with the data assigned to the user by the Manager. This data is referred to as the "subset" and is the equivalent of an AgriLife Department four letter Code.
- 2. Powering on scanner
 - a. To power on the scanner, press the small round red button in the lower right hand corner of the scanner.
- 3. Login/Logout
 - a. From the main menu, click the "Login/Logout" button to log a user into the scanner.
 - b. This button facilitates logging in and out of the PDA application. Tapping on this button will produce the following screen:



the login screen appears, type in the assigned ID and password in the space indicated and press the "OK" button (see above).

d. When the setup connection has been completed, the department inventory should load onto the scanner. This is evident when the user ID and department name are displayed in the "Subset" section across the bottom of the screen.

a. Because the system is administered from a central location, the Login ID and password entered on the scanner are not validated until the scanner is synchronized with the main system. This means that the scanner will allow access to the data currently on the scanner even if there was a mistake made on the Login ID. However, if a valid ID and Password is not entered correctly, the scanner will not synchronize properly.

NOTE: The user ID and Password are CASE SENSITIVE.

b. After all connestions are extablished, the website is accessed with the same assigned ID and password; the website will also require a "database" which will always be either "Agrilife or Texas Vet Medical Diag Lab.

B. Conducting Inventory

 To begin collecting inventory data, tap the Physical Inventory button on the Main Menu. This screen prompts the user to scan the Asset Number (bar code tag). Users can also enter this value using the scanner keypad. Once an item is successfully scanned, S&V will display the detail record for the matched item. Image 1



- a. Scan an asset tag to begin the inventory, image 1.
- b. As items are scanned, their records are displayed and can be confirmed. When data is first assigned to a Subset, Scan & Validate gives a status of "NoScan" to every item in the set (meaning the item has never been scanned or validated). If the item's real-world condition matches the scanner-record, it can be marked Correct by pressing the Correct button. This will assign a status of Correct to this item and automatically prompt the user to scan the next item see Image 2.

View Detail			Image 2
Status: NoScan	Entr	y:	
AssetNum	167189	_	
Desc_1	BATON PRESIDE	NTS	
Desc_2	60IN WOOD/SILV	/ER	
Building	0002		
Room/Floor	204		
Custodian			-
Dept	10100		
SubDept	AA		
DeptName	PRESIDENT OFC	-	1
Back	Change	Correct	

- c. If something in the item detail is not correct, the item's record can be modified on the spot by pressing the Change button. Pressing the Change button will automatically set the Status to "Change", and allow the user to edit whatever needs to be updated.
- 2. Note that the "search by" field is a drop-down list. Tapping on the arrow will produce the following screen:

Phys Invento	Ϋ́	
Search by: Search for:	AssetNum AssetNum Desc_1 Desc_2 Building Room/Floor Custodian Dept	
<< Main	Menu OK >>	

S&V allows users to search the scanner database by any field available in that database.

If the tag is missing or damaged, users can search for the item using the serial number.

C. View Inventory

1. From the main menu select "View Inventory". The "View Inventory" module provides filter utilities and summary information on the records in the scanner. Tapping the View Inventory button from the main menu will produce the following screen:

W02048 W03628 W04736	PRINTER COMPUTER MINI CREDENZA/CHER	
W05329 W05330 W05331	CABINET-STG CH CREDENZA 26 X	IERRY
W05332 W05333 W05334	CABINET-STG CH DESK W/LH RETU CABINET-STG CH	JRN
Back	Filter	Info

When first accessed, View Inventory displays the all inventory items on the scanner (whether the user has validated the item yet or not).

From this screen, users can either set a filter on the data or press the Info button to see a summary screen.

2. Pressing the Filter button will produce the following screen:

From this screen, users can enter a value for any field in the scanner database to create a subset of all matches.

For example, before leaving a Location, users could set a filter on that location and then using the Info button, view all NoScan items in that location.

This process can also be applied with multiple filters such as NoScan items in a particular room in a particular Location.

\backslash	Filter					
	Asse	tNum	I			
	Desc	_1				
	Desc	_2				
	Build	ing				
	Roon	n/Floor				
	Cust	odian				
	Dept					
	SubD	ept				
	Dept	Name				
	Maka	•				-
		Clear	Filter	Set	Filter	

D. Synchronizing Data

- 1. The final part of using the scanner is to perform a Sync or "synchronization". During synchronization, all data entered is sent from the scanner to the database server, and the latest information is retrieved from the database server and copied to the scanner.
- 2. To perform synchronization, place the scanner in the cradle. On the Scan & Validate main menu, hit the Sync button to begin the synchronization. Once the synchronization is complete, all items scanned will be update on the database server, and all new information will be retrieved.



E. Validating Inventory

- 1. Validation Progress
 - a. Log onto to the online website at http://web3.incircuit.com/sv/login.cfm

🕒 💭 🖉 http://web3.incircuit.com/sv/login.cfm	- 🔛 😽 🗙 📴 Bing 🛛 🔎 -
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× €Convert ▼ Select	🗶 🔛 Snagit 🧮 🖽
🚖 Favorites 🛛 😥 Scan & Validate Login - InCircuit Scan	🏠 🔹 🔂 👻 🖃 🚋 👻 Bage 🔹 Safety 👻 Tools 👻 🔕 🛀
Scan & Validate Login Welcome to InCircuit Scan & Validate!	

2. Summary page

a. Managers may view the progress of the inventory process. The page lists all subsets that have been created, along with the last date/time the subset was synchronized. It will also display the last user ID that performed the synchronization. To view the actual contents of any of the subsets, click on the subset name link. Most departments will only have one subset.

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- b. Click on the inventory that requires review and a pop-up box with the first 20 line items will appear.
 - i. Navigate screen to screen by using the (First Page, Previous Page, Next Page & Last Page) buttons across the bottom of the pop up box.
 - ii. To review any individual item, click on the line item. This will bring up a screen with a side-by-side comparison of the "Original Value" and the "Validation Value."

If the information is correct, it will remain the same information as before. If the information required edits, it will highlight the differences in red (see below).

🏉 Asset Detail - InC	ircuit Scan & Validate - Internet Explorer	provided by Dell		
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<u>File Edit View</u>	/ F <u>a</u> vorites <u>T</u> ools <u>H</u> elp			
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Scan &	Validate		ǎ 🌢 🗳 🤗 😨	⇒
			Inventory Reports Admin News Help	Sign Out
user: InCircu		db: demo		
Asset Deta	il			
This record wa	is last updated on 08/13/2008 at	: 10:1:00 AM by ld using the PC keyboard		
	Validation Value	Original Value		
Approved				
Status	Change 👻			
Division	1-772	2-135		
AssetNum	00062820	00062820		
Description	MONITOR EV730 17	MONITOR EV730 17		
Make	GAT	GAT		=
Model				
ModelYear	2003	2003		
SerialNum	MU17108G0113923	MU17108G0113923		
Building	SURPLUS	HIN		
Room	PALLET1	14		
PersonResposi				
Notes1	PR			
Entry	P			
Scanned	N			
Mod User	ld			
Mod Date Mod Time	08/13/2008			
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<< Cancel	Save >>			
				•
Done			🏹 😜 Internet Protected Mode: Off	🔍 100% 🔻

2. Changes

If assets has a change, scroll down to the bottom of the page and make a simple and understandable note of the change. In the example above, a room and user change was made; scroll to the note line and type "room/user/UIN change" or "room chg and user/UIN chg."

- a. As long as the note makes sense as to what changes were made, it will most likely be acceptable. The Property Manager will review all changes and contact the department with any questions before approving.
- b. If a replacement bar code label is needed for an asset, please make that the first part of the note.
 - i. All "No Scans" must include a note to inform the Property Manager the reason why the items did not get scanned.
 - a) Common reasons for this include the asset is out on location, out on business, at someone's home (should have a AG-311 or

AG-322 form on file), missing (should have a missing form on file), still missing (if the item was previously reported missing), transfer in progress (show transfer reference number for Surplus or Department).

- b) Any property that is out on location, out on business or at someone's home should have email verification as backup; any transfers should have a signed copy of the transfer attached to the final certification as backup.
- 3. Review

The user should review all assets on-line to complete all notes on any affected assets, and make required email verifications and follow-ups.

- a. Email verification is required on assets that are located outside of the scanning area; for example, someone has a laptop or printer that is used at home, someone from the department is housed out of town. Email should have picture of tag in order to verify each year. If someone has equipment at home, the asset should be brought in at least once every two years for scanning.
- b. When everything has been properly documented, and the process is completed notify the Property Manager that the department is ready to certify.
 - i. During this time, collect any and all email verifications and any other backup that is needed for certification.
- c. The Property Manager will review the online listing to verify that all requirements are met.
 - i. The department will be contacted with any questions before final approval.
 - ii. After final approval is made, the Property Manager will contact the department to print the final certification.

F. Final Certification

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- 1. Log into the web-based inventory system, <u>https://scanandvalidate.com/ptgsv/login.asp</u>, click on the Reports Icon located in the upper right hand corner. *Note this is a different web-address used for reports only.
 - a. Click on the "Custom Reports".
 - b. A reports page with four reports listed on it will appear.
 - c. Move the cursor to the last report called "Certification Prompt for Unit" and click.

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I Certification
Ecrtification - Grouped By Subset
III Certification - Grouped By Unit
II Certification - Prompt for Unit

2. Another screen will pop-up asking the user to "Please specify the unit to display on the certification report" with a white box. In the box, specify each department's 4-letter <u>code</u> and proceed as instructed by the system.

<pre></pre>	»
Please specify the unit to display on this certification report.	~
Unit: ANSC	
OK	
	~
Done 😜 Internet 🖓 🕶 🔍 100% 🔻	

Example: Department of Animal Science, department code is ANSC.

File Edit Vie	w Favorites Tools Help			
< 🍖 🔹				
🖕 Favorites	👍 🏉 Suggested Sites 👻 🙋 Free Hotmail	👼 Free AOL & Unlimit	ed Internet 🛛 🙋 Get M	ore Add-ons 🔹
) https://scanar	dvalidate.com/ptgsv/reports/rpt_custo			
	TEXAS TRANSPOR CERTIFICATION OF PHYSICA	TATION INSTITUTI AL INVENTORY		
as been take ccounted for	ble Property Officer of the following acc n of all State property entrusted to my a . The information on the listing is correct able on the property. Exceptions are lis	ctivities. All items of The inventory nur	on the attached listin	g are present or
ANSC	Department of Animal Science			
		-		
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- 3. After the report has been printed, close the form by using the red x in the upper right corner of your screen. This will take you back to the Unit box screen, where you can enter more departments (if you are doing inventory for multiple departments).
- 4. After reports have been printed:
 - a. Make sure that the comments section at the bottom of each page has been filled in with requested information:
 - i. listing all the names of individuals that help during the inventory process.

- ii. any and all copies of back (emails, transfer forms, loan forms, etc.).
- 5. The Certification form <u>MUST</u> be signed by the Accountable Property Office (department or unit head) and dated.
- 6. After the proper signatures are obtained mail the original certification with all backup to the Property Manager for processing.

IV. Contacts

A. Cyndie Michalak; Property Manager Phone: 979-845-4791 <u>ca-michalak@tamu.edu</u>

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