Employee Equipment Acknowledgment Form (EEAF)

System Manual

November 1, 2017
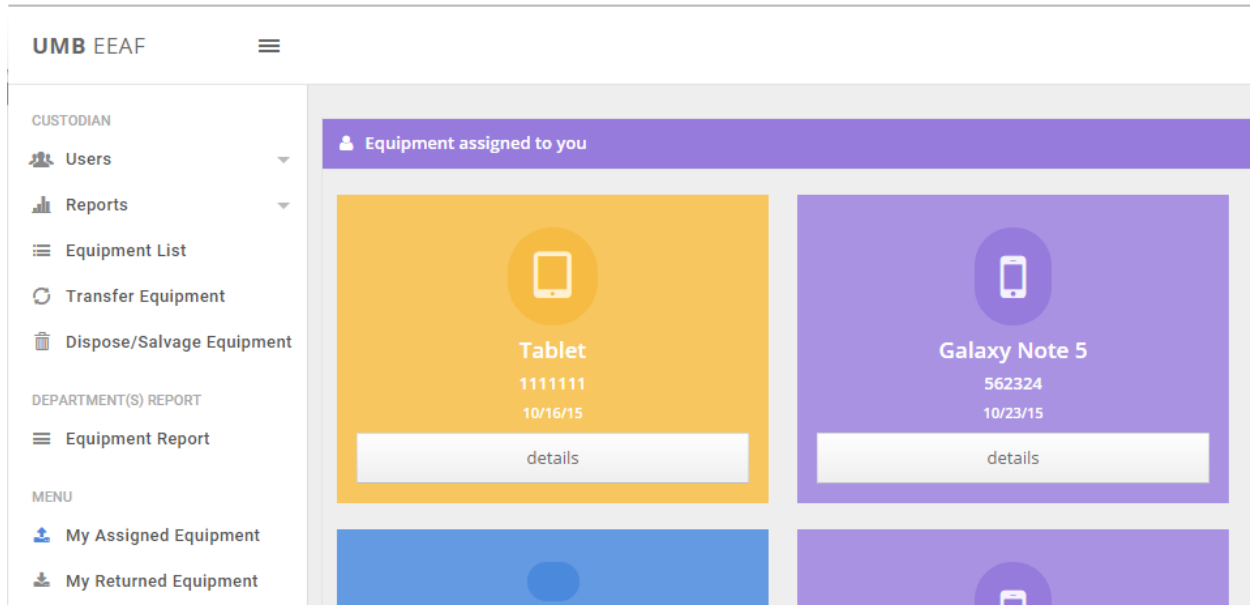
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Employee Equipment Acknowledgment Form (EEAF) System

Section 1: Application Information

The application is divided into two main columns. The menu is displayed in the left column and the content is displayed in the right column:

There are two campus-wide security levels: Custodian and Users. Custodians control equipment records for Users according to the departmental access assigned by Financial Services-General Accounting (FS-GA). Users are the general campus population who receive equipment.

Section 2: Custodian Role

Note: A Custodian is not able to assign or return his/her own equipment.

The custodian menu has three components: Users, Equipment, and Reports.

A. **Manage Users**
   A User record is created when the User logs into the EEAF System. The System populates the User record (e.g. department, email) with information retrieved from the Directory.

   To determine if a User record exists:
   1. Select Manage Users.
   2. Type in the User's last name or email address.
   3. Click Go.

If the User record does not exist:

1. Select Add email.
2. Select Click Here.
3. Select Send email. The System will send a link to the User inviting the User to log into the System. The Custodian will receive an email stating that the User has logged in and a record has been created.

B. **Duplicate User Records**

If more than one User record exists for the same individual, the records can be merged. See D-6 How to Merge Duplicate User Records.

C. **Manage Equipment**

Equipment has three attributes: type, status, and condition:
- Equipment Type: A general description of the equipment. Examples are laptop and tablet. FS-GA manages the list of types. Please contact FS-GA to request additional equipment types.
- Equipment Status:
  i. **Pending Assignment:** Default status. Equipment is available for assignment.
  ii. **Assigned:** Assigned to User.
  iii. **Returned:** Equipment returned to the available equipment stock. Equipment may be reassigned, transferred, or disposed. This is a temporary status. The system will automatically change the status to Pending Assignment. However, the User will see the equipment as "Returned" in the "My Returned Equipment" section.
  iv. **Lost:** Equipment lost. All equipment in Lost Status must have documentation. Custodians should request a written statement from the User confirming the equipment is lost. An Excess Property Declaration/Capital Asset Deletion Form is also required.
  v. **Stolen:** Equipment stolen. A police report and Excess Property Declaration/Capital Asset Deletion Form are required.
  vi. **Disposed/Salvaged:** Equipment is no longer in circulation.   An Excess Property Declaration/Capital Asset Deletion Form is also required.
- Equipment Condition: Satisfactory or Unsatisfactory

→ The first step is to create the Equipment List.

1. **How to Add Equipment**
a. Go to Equipment List on the menu.
b. Click Add Equipment.
c. Enter the following required fields:
   i. Serial Number – Unique number.
   ii. Equipment Type – Select the type. The equipment listed in red print are the required DNCAs. Other items may be added to the system at the department's discretion. Contact FS-GA to add items to the list.

iii.   Department – Select the department that is responsible for the equipment.

iv.   Equipment Description – Additional information to identify the equipment may be entered in this field.

d.   The additional fields (i.e. tag, PO (purchase order), project ID, etc.) are not required.

e.   If applicable, check the box indicating the equipment will be used by multiple users or in a shared space, such as a conference room or lab. Shared equipment must be assigned to a custodian for tracking purposes. The custodian is responsible for managing the equipment in the EEAF System (e.g. transfer, disposal, lost, etc.); however, the custodian is not held personally liable for damage or loss caused by another user. Accordingly, EEAFs generated for shared equipment differ from EEAFs generated for individual users.

f.   Click on the "Add New Equipment" button to submit.

👤 Equipment Information Update		
Serial No* 12112015A	**Tag No**	
Equipment Type Audio / Visual ▼	**Department** 🔖 06203000 - Financial Services ▼	
Description* test	**Purchase Date*** 📅 12/11/2015	
PO	**Amount** $ $0.00	
Project ID	**Added Date/Time** 🕐 Dec 11, 2015 11:54:42 AM	
Building - ▼	**Floor**	
Room/Location	**Comment**	
☐ Equipment will be in a shared space or in an open lab		Edit Equipment

2. How to Assign Equipment

a.   Note or copy the serial number for the equipment that will be assigned.

b.   Go to Manage Users from the menu.

c.   Find the User who will receive equipment.

d.   Click on "Edit Options" at the right corner of the User information.

e.   Choose "Assign Equipment" option from the dropdown menu.

f.   Enter or paste the serial number in the "Find Equipment" box.

g.   Verify the information populated into the fields is correct.
Note: Possession status changes to "Assigned".

h.   Click on the "Assign Equipment" button to submit.

i. After assignment two events occur:

1. The system confirms assignment.

2. The User receives an email alert.

From: fmhelpdesk@umaryland.edu [mailto:fmhelpdesk@umaryland.edu]
Sent: Friday, December 11, 2015 12:02 PM
To: Dodson-Lake, Victoria
Subject: EEAF - New Equipment Assigned to Victoria Dodson-Lake

You have been assigned a New Equipment

Dear Victoria
You have been assigned a new equipment by Cynthia Lyons. The equipment information is as follows.

Serial No:	**12112015A**
Equipment:	**Dell Tablet for Inventory**
Assigned Date:	**12/11/15**
Time:	**12:01 PM**

To accept or decline this equipment click on the button below

Review New Equipment

j. The User may accept or decline the equipment. The Custodian will receive an email alert after the User accepts or declines the equipment.

3. How to Return Equipment

When the User returns equipment the Custodian changes the equipment status to "Returned":

a. Go to Manage Users from the menu.
b. Find the User who is returning equipment.
c. Click on "Edit Options" at the right corner of the User information.
d. Choose "Review Assigned Equipment" option from the drop down menu.
e. Select the correct equipment by clicking on the corresponding "Edit" button.
f. Change Possession Status to "Returned".
g. Click on the "Edit Assigned Equipment" button to submit.
h. System confirms change in status:

> ✔ **Update successful.** Equipment Assignment Updated

4. How to Reassign Equipment

a. Note or copy the serial number for the equipment that will be assigned.
b. Go to Manage Users from the menu.
c. Find the User who will receive equipment.
d. Click on "Edit Options" at the right corner of the User information.
e. Choose "Assign Equipment" option from the dropdown menu.
f. Enter or paste the serial number in the "Find Equipment" box.
g. Verify the information populated into the fields is correct.
h. Click on the "Assign Equipment" button to submit.

Note: After equipment is reassigned the Custodian can view the Equipment History to trace possession: Equipment List >Find Desired Equipment>Edit Options>Equipment History. Individual Users can view returned equipment through the "My Returned Equipment" screen.

Equipment History

Issued Date	Return Date	Name	
10/20/2015		Susan McKechnie	no terms
	10/20/2015	Susan McKechnie	
10/20/2015		Candace Chow	no terms

5. How to Mark Equipment Lost, Stolen, or Disposed

a. Go to the menu "Equipment List" found on the menu.

b. Find the equipment to edit.

c. Click on "Edit Options" at the right corner of the equipment information.

d. Select desired option from the dropdown menu

e. Click on the "Choose File" button to navigate to file(s) for upload.

f. Required documentation:

Reason	Required Documents
Lost	1. Written statement from User. 2. Excess Property Declaration/Capital Asset Deletion Form
Stolen	1. Police report. 2. Excess Property Declaration/Capital Asset Deletion Form
Disposed	Excess Property Declaration/Capital Asset Deletion Form

g. Click on red button to submit.

h. When successfully uploaded and submitted, the documentation as well as the User and date information will appear on the right side of the page:
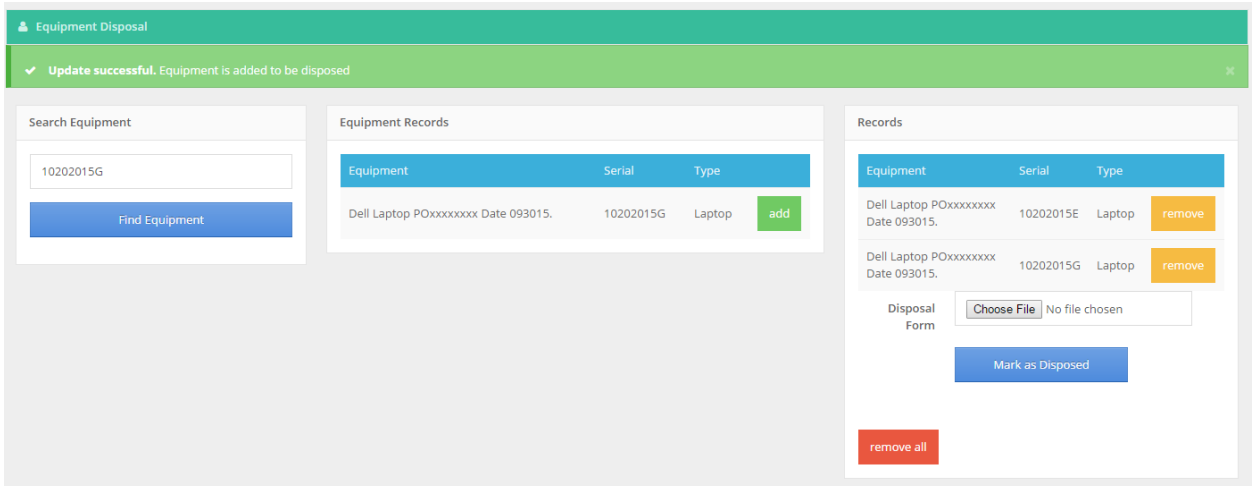
Note: Contact FS-GA if a lost or stolen item is recovered. FS-GA will change the equipment status to "Pending Assignment".

D. **Tools**

1. **How to Dispose Multiple Assets**

Follow the instructions in Number 5 above to dispose assets. The Equipment Disposal page allows multiple disposals:

- Enter serial number(s) for desired equipment in the Search Equipment box.
- The system will populate the Equipment Records box with the desired equipment.
- Click "Add" to move the desired equipment to the Records box.
- Upload documentation.
- Click "Mark as Disposed" to submit.

2. **How to Transfer Equipment to another Department**

a. Go to the menu "Transfer Equipment" found on the left navigational menu.

b. Enter the serial number.

c. Click on "Go".

d. Select the correct equipment by clicking on the "Select" button.

e. Verify the equipment information.

f. Select the receiving department from the dropdown box.

g. Click "Assign New Department".

Note: FS-GA and receiving department Custodians are the only personnel who can reverse this action.
All equipment transferred will be available for record keeping under Reports > Equipment Transfer:

	Serial No	Tag No	Description	From Department	To Department	Transfered
1	10202015	789654	Dell purchased FY2016	06203000 - Financial Services	06202000 - Budget & Financial Analysis	Oct 20, 2015 1:40:08 PM

3. How to Review Equipment History

a. Go to Equipment List.
b. Search using specific criteria or leave as "all".
c. Select the equipment to review.
d. Click on "Edit Options" at the right corner of the equipment information.
e. Choose "Equipment History" option from the dropdown menu.

4. Reports

Various reports are available as indicated in the Reports menu found on the left navigation bar.
Reports may be exported in PDF or excel format:

PDF ⟶ [🄿 | ↧] ⟵ Excel
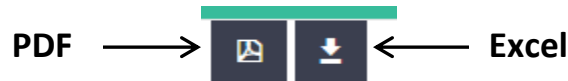
5. How to Print Terms and Conditions for User

a. Go to Manage Users from the menu.
b. Find the desired User.
c. Click on "Edit Options" at the right corner of the User information.
d. Choose "Review Assigned Equipment" option from the dropdown menu.
e. Find the desired equipment and click the "Edit" button.
f. Click "Print Acknowledgment".
g. Click "Print".
h. A User may sign the form and the Custodian can upload the form as a PDF file:
   • Go back to the Edit Equipment page and click "Choose File".
   • Click "Upload" to submit.
   • After the file is uploaded the signed acknowledgment is available for viewing:

Edit Equipment Assigned to *Avis Suber*

✔ **Upload successful.** New acknowledgement uploaded successfully.   ✕

Serial No* 12112015	Tag No 568945697
Equipment Type Laptop	Possession Status Assigned
Description * Dell Laptop for Sheri	Purchase Date* 12/11/2015
PO PO 123456789	Amount $ $1,500.00
Project ID 12345678	Added Date/Time Dec 11, 2015 9:43:59 AM
Building Saratoga Building	Floor 13
Room/Location 02-125	Comment To replace obsolete equi|
Condition Status Satisfactory	Issued Date 12/11/2015 12:15 PM

Open Signed Acknowledgement   Print Acknowledgement   Edit Assigned Equipment

Acknowledgement to upload   Choose File   No file chosen

🔔 Valid upload types are Word and PDF

Upload

6. How to Merge Duplicate User Records

a. Go to Merge Users from the menu.

b. Type in the User's Last Name for the correct record.

c. Select the desired Master Record.

d. Type in the User's Last Name for the record to merge with the Master Record.

e. Carefully read the Merge screen to ensure the information is correct.

You have selected to Merge the following record

Name	GUID	Email
John Smith		john.smith@umaryland.edu

With this record (this record will be permanently erased)

Name	GUID	Email
John Smith		jsmith@umaryland.edu

◯ I want to Merge   Merge [Action Not Reversable]

f. Select "I want to Merge."

g. Click red button.

Section 3: User Role

Users are employees and affiliates who are assigned DNCAs. Users receive an email after equipment is assigned and are required to accept the terms and conditions described in the agreement. Users are required to return the equipment when no longer used for UMB business. Employees must immediately report lost, stolen, or damaged equipment to their supervisor. Affiliates must immediately report lost, stolen, or damaged equipment to the appropriate UMB fiscal administrator.

Section 4: Support

Send requests for assistance with the EEAF System to DL-AFEEAFSupport@umaryland.edu.