INVENTORY GUIDANCE DOCUMENT 2013

UNIVERSITY OF Hull

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Introduction

The University has kept a central database of equipment since 1997 in the form of the Assets and Inventory system. The Inventory System operates by accessing a single screen which contains a main header section of mandatory fields and a series of supplementary information areas accessed by tabs. Purchasing information can be pulled through from the Purchasing system (POP) by entering an order and line number, rather than having to re-key the data. The inventory also has a reporting functionality and the ability to load reports in Excel for manipulation. The Financial Regulations of the University now requires that all equipment valued at £1000 or more **MUST** be entered on the system. The only exceptions to this rule are iPads, Smart Phones and Laptop which still need to be added. To help staff decide if an item should be logged on the inventory system, there is a standard cost tab within the Inventory system. Departments may want to include all their low value electrical and non-electric items to the inventory and there is no reason why these cannot be added if there is a wish to have a complete list of all inventory in one place.

Under recent EU Legislation (WEEE directive) all electrical items must be disposed of correctly and as a consumer of electrical and electronic equipment, the University has a duty to arrange the correct disposal of waste electrical equipment through appropriate arrangements. Attached is the WEEE disposal form which must be completed when disposing of an electrical item, once completed the item is then sent to the appropriate personnel to be disposed. Further information about the WEEE directive can be found on the Purchasing and Insurance Office Websites under the Inventory System link. To help comply with the University's procedure for disposal of electrical equipment all departments **MUST** enter on the inventory system the method of how the equipment was disposed of and the date it was deleted.

It must be emphasised that the initial entry of an item into the system is only a small part of the necessary process of keeping the records accurate and up to date. Equally important, is the updating of the records if the location of an item changes or the user changes or ownership is transferred to another department. The system has been designed to make these changes easy to undertake. It is also essential that disposal records are accurately kept to comply with the legislation.

All inventories must be regularly spot checked by the departments. It is suggested that 25% of the list is spot checked annually and the results of the check advised to Helen McCreath.

Each department is responsible for maintaining its own inventory and at least one person in each department must be set up to use the system.

User Manual & Guidance

All staff needing to become an Inventory user must be registered on the system otherwise they will not have access to the system. A registration form is attached to this document or can be downloaded from the Purchasing and Insurance Website via the Inventory link.

1.1   Start up in windows

Click on the **START** button and then **APPLICATIONS, CORPORATE SYSTEMS, WINDOWS APPLICATIONS, INVENTORY SYSTEM**.

You will then be asked to enter your **LOGIN** and your **PASSWORD** (these will have been given to you via Corporate Systems). If your **LOGIN** and **PASSWORD** are correct you will be allowed to enter the Inventory System.

2.0   Creating, updating or disposing of inventory

Once you have successfully logged on, you will be able to start using the Inventory System to add new inventory, update and edit records already stored in the system and dispose of equipment. You will also be able to run reports on your inventory, but this will be considered later. The Inventory Main Menu looks like this:
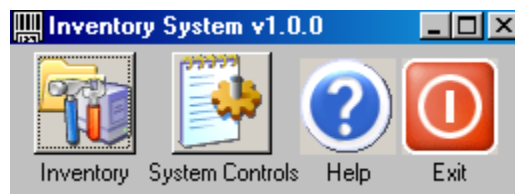
2.1   Adding a New Item of Inventory

From the Main Menu, select the icon and select Maintain / Browse Inventory and the following frame will be displayed:

Complete this screen as follows - all are mandatory fields.

Code	This will remain blank until you select 'Add New' after completing all the following fields. This description will be used for all reports.
Description	Type in the description of the equipment / inventory here (maximum 40 characters)
Long Description	Type in a longer description of the equipment / inventory you are adding if required (maximum 120 characters). If you do not complete this box it will be filled from the Description box above.
Status	A = Active, all new inventory will have this status.
Inventory Category	Enter the inventory category if known or use the Search facility to select e.g. CO for computers, VE for vehicles
Inventory Type	Inventory Types are specific to the Inventory Category, i.e. only valid types can be used against each category. e.g. When Category is CO then types will be LAP for laptops, PRI for Printers, SER for server etc.
Owner Faculty	Enter the Faculty code which represents your Faculty or choose use the search facility e.g. 002 is Administration
Owner Dept	Enter the Department code which represents your department or use the search facility e.g. 372 is the Insurance Office
Building	Enter the building code representing the building in which the item of inventory is kept or use the search facility
Room	Enter the room number code representing the room in which the item of inventory is kept or use the search facility.
Quantity	Enter 1 unless a software licence where number of users can be entered
Acquisition date	Enter the date when the inventory arrived at the university. This will be overwritten by date of delivery if you complete the Purchasing Information fields later.
Parent inventory code	Sometimes you may have purchased an 'add-on' to an existing piece of equipment. There is a facility to 'link one item of inventory to another. Enter the inventory code of any item or enter "none" if not linked.

Serial number	Enter Serial number from item or "none". The serial number should be no longer than 12 characters for it to appear in 'excel' reports
Ownership status	Enter O for owned by the university or L for on loan, or choose either of these selections from drop down list.
Is Electrical	Enter yes or no depending on whether electrical or not (battery powered is electrical as well as mains powered)
Name of user	Enter the name of the main user of the inventory or a contact name if in a general area
Equipment User phone number	Enter the telephone contact details of the person named above
Value	Purchase price including VAT rounded up to nearest pound. If actual amount not known, refer to STANDARD COSTS tab.
Dept ID	Optional field to add the department user

Then click on 'SAVE'

Please note that throughout the System there are Help Screens. If you are not sure of what to do select **HELP**.
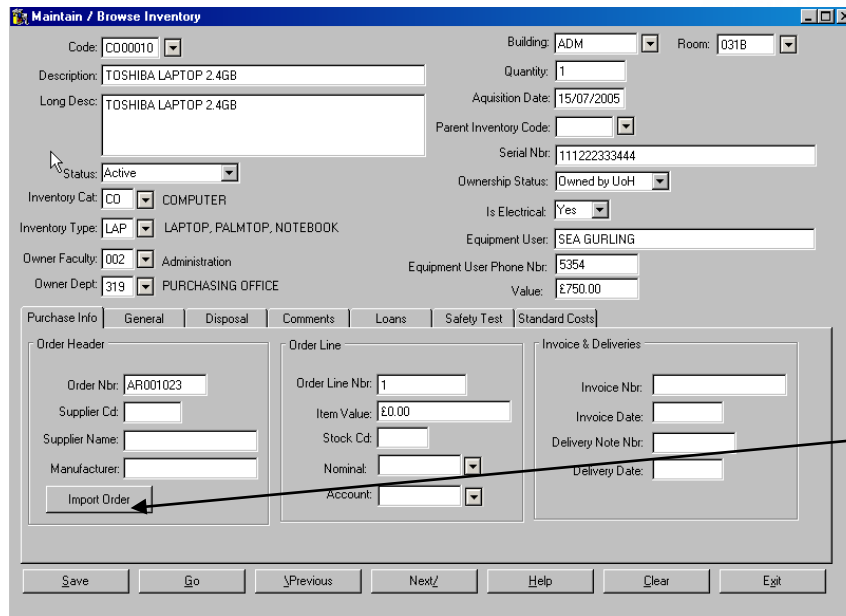
An Inventory number will be generated by the system. You will note that all equipment/inventory for a particular Inventory Category will have a code which commences with the same alpha character (i.e. **CO**000001 = Computers).

Once the Inventory Master Record is completed and saved it is possible to enter further details about the item on inventory by clicking on any of the tabs on the lower part of the screen. The options available to you are:

- Purchasing Information
- General Information
- Loans Information
- Safety Test Information
- Disposal Information
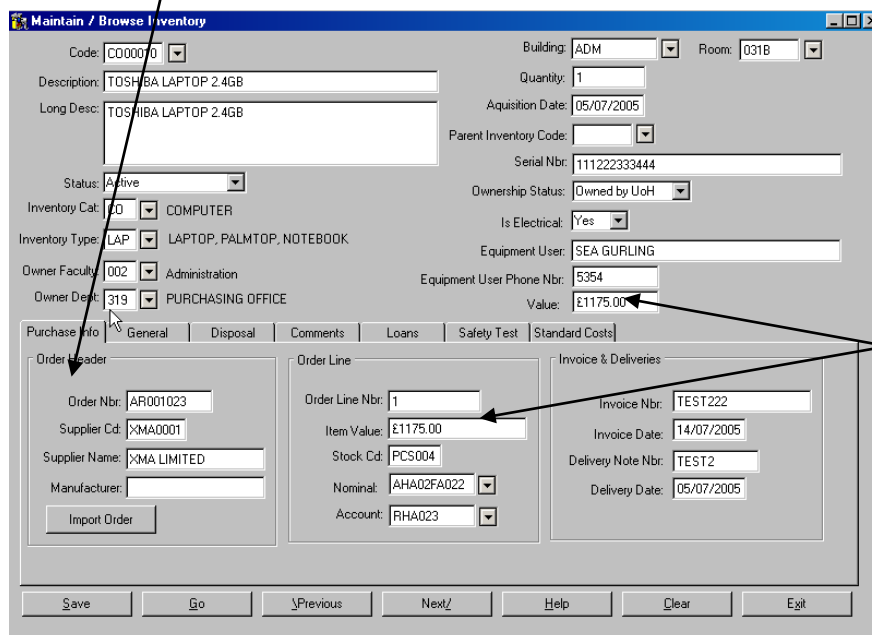- Comments

2.2   Adding Purchasing Information

The system has been designed so that upon entering a valid POP Order and Line Number, the relevant details are pulled through from the Purchasing System without the need for the user to re-key the information. Any of the fields can be overwritten or left blank should you choose to do so.

The only field that is not in the POP system is the Manufacturer, you can enter this manually

To import order enter Purchase order number and Order line number then click on Import order

You can either enter the details of the purchase order manually, or import from the Purchasing System. To import enter the purchase order number and then the purchase order line number and then click on Import Order to transfer the order details onto the screen, otherwise type in as many of the fields as you have information for. If you 'import order' the screen will display information held against the Purchase Order:
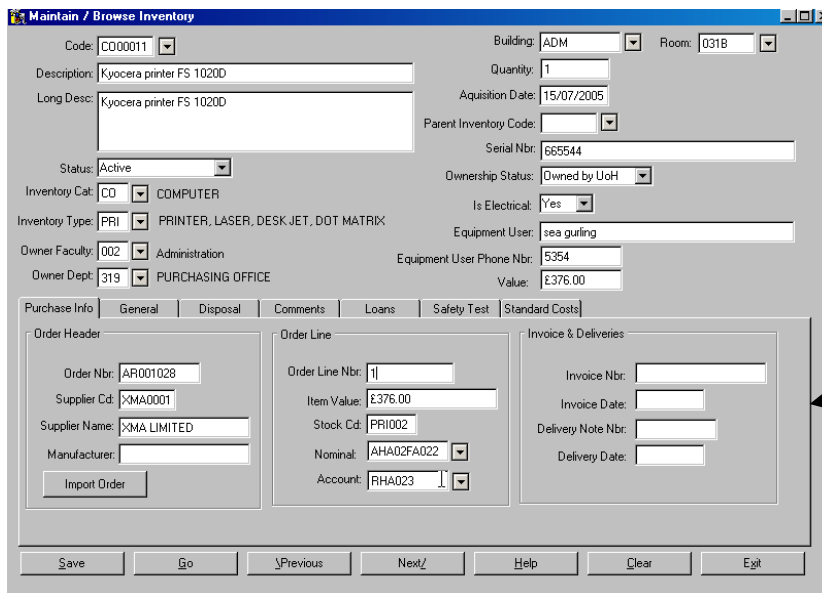
If the value of the order is different to the value entered on the Inventory header record the inventory header record will be updated from the order information

Purchase Order number	Text field up to x characters
Supplier Code	Enter supplier code if known or use the search facility
Supplier Name	Normally filled from Supplier Code but can be entered manually
Manufacturer name / ref	Text field This is the only field on this screen that is not imported from the POP system and will need entering

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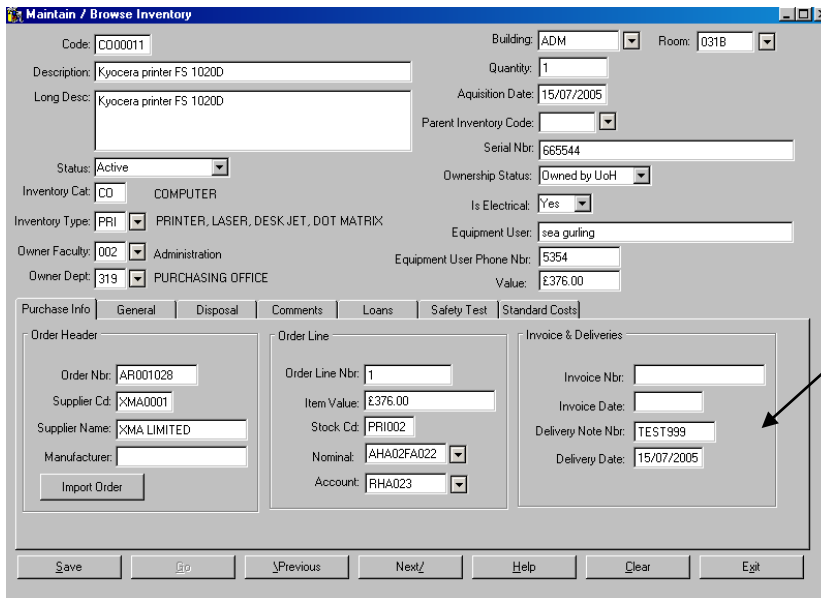|	manually
Purchase order line number	Whole number up to 999
Item Value	Amount, including VAT (If you do not know the price of an item then click on the STANDARD COSTS tab to find a cost of a similar item
Stock Code	The stock code used on the purchase order line
Purchase Order Nominal	Text field x characters or use the search facility to select a current valid Dream/finance code
Purchase Order Account	Text field x characters or use the search facility to select a current valid Dream/finance code
Invoice number	Text field x characters
Invoice Date	The date of the supplier invoice number
Delivery note number	Text field x characters
Delivery date	The date the item was delivered

SAVE upon completion.

If, when you import a Purchase order there are no deliveries or invoice details in the POP system, these fields will be blank when you import. You can click on 'import order' again the next time you call up the item of inventory and if deliveries or invoices have subsequently been added in POP these will now be imported into the Inventory system. The facility to 'import order' a second time is only suitable if there is only one delivery/invoice against a particular order line. If the order line was for more than a quantity of 1 and there were multiple deliveries/invoices against the order line, you must type the delivery and invoice details in manually. See the following screens:

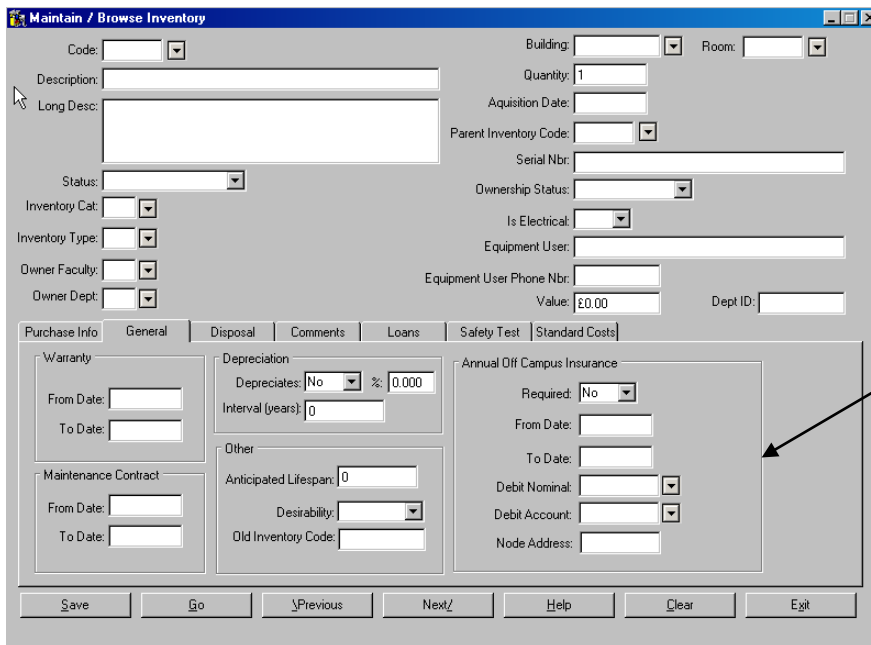Order Imported with no delivery or invoice details at time of import

Click on 'import order' again later on and because there are now delivery details against the order these will be displayed

2.3   General information

You have the option to record additional information about any item of inventory on the system, such as maintenance contracts, warranty dates etc. This screen can also be used by those departments who wish the University to arrange off campus insurance for equipment such as laptops which are frequently removed from site. It should be noted that insurance is only effective for equipment which is located on one of the University sites. For further information about this insurance, contact the Insurance Office on ext 6403.

Enter your request for Equipment Off Campus Insurance. You must enter a nominal and account to charge this to (details of costs are available from the insurance Office web site on http://hull.ac.uk/insurance and click on insurance forms).

Any or all of the fields on this screen can be completed if required:

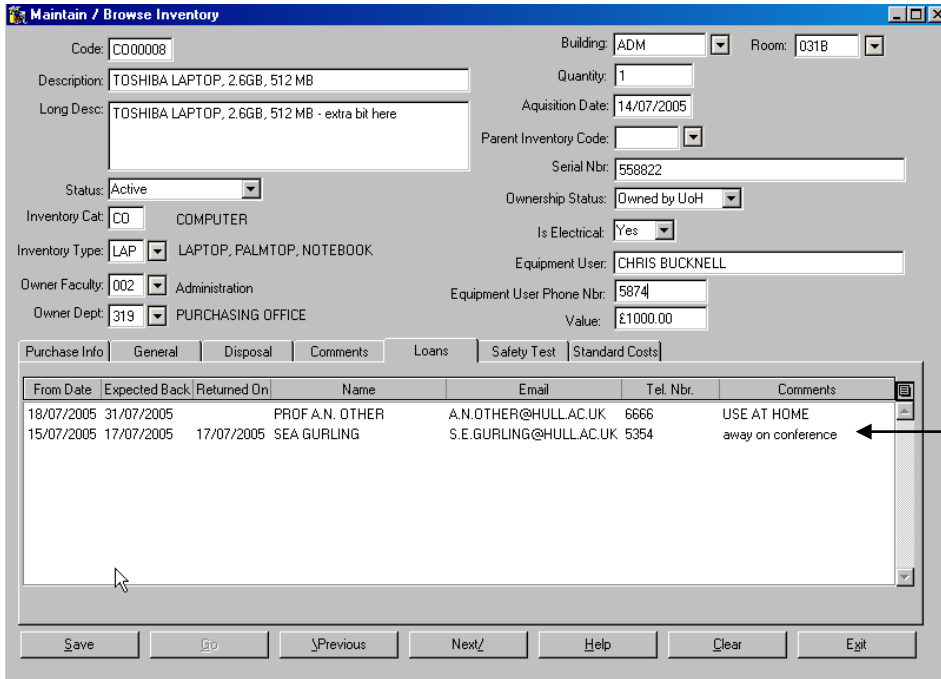| Warranty from date	Enter start date of warranty period. Warranty periods on equipment are usually 12 months from date of delivery.
Warranty to date	End expiry date of warranty period
Maintenance contract from date	Start date of maintenance period
Maintenance contract to date	End date of maintenance period

Depreciates	Enter details if known
Depreciation %	Enter details if known
Interval (years)	Enter details if known
Anticipated Lifespan	Enter number of years, whole number up to x
Desirability	You can select whether the inventory item is an essential one to your department or desirable
Old Inventory Code	The old inventory code used in the old inventory system will be displayed here for all users who migrated their existing inventory onto the new system.
Annual Off Campus Insurance Required	Yes or No
Annual Off Campus insurance From date	Enter date when off campus insurance required
Annual Off Campus To date	Enter date when off campus insurance should end
Insurance to be charged to Nominal	Enter nominal code where insurance premium can be debited
Insurance to be charged to account	Enter account where insurance premium will be debited
Node Address	The node address is only applicable to computers

As before, **SAVE** any information entered on completion.

2.4 Equipment on Loan Information

If a department loans equipment such as laptops to staff, students or outside organisations they can use the Inventory system to keep a record of such loans. Select '**LOANS'** tab and complete the line as appropriate.
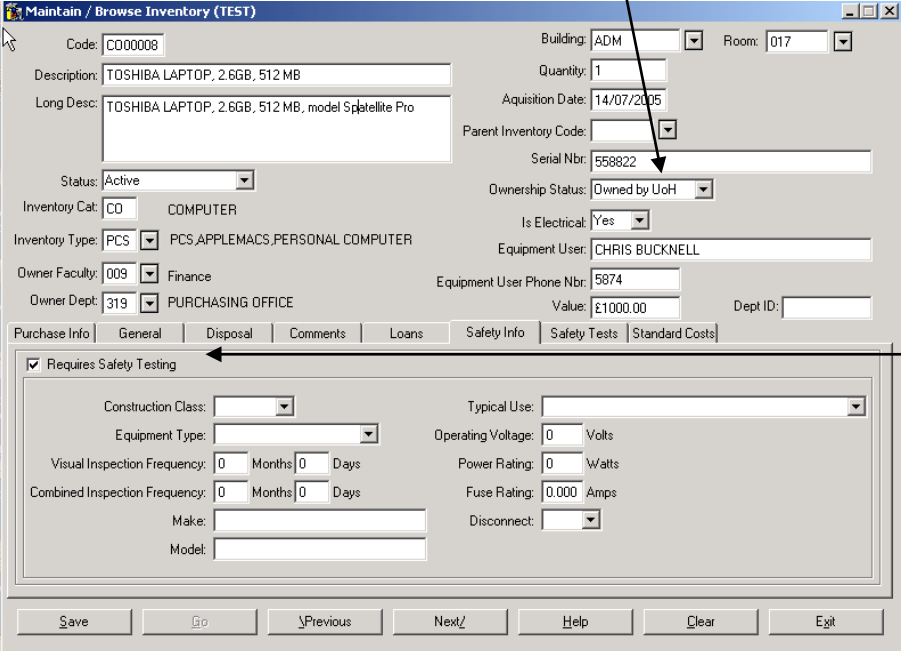

The Loans section can keep track of equipment that has been issued out on loan. It retains the information in descending date order

This screen will enable you to keep a record of who has the equipment at any time and when it is expected back. The system will keep a track of previous loans in descending date order (i.e. most recent loan will be shown on the first line)

2.5   Adding Safety Test Information

The Inventory system incorporates two screens to record Safety Information and Test recording. All electrical items should be properly tested in accordance with instructions given by the Health and Safety Office. The procedures can be found in the document **Code of Practice Portable Electrical Appliance Inspection and Testing (Including Policy and Guidance Notes)** dated August 2006. The Inventory System allows for the safety test information to be recorded against individual items of inventory and for a range of reports to be produced.
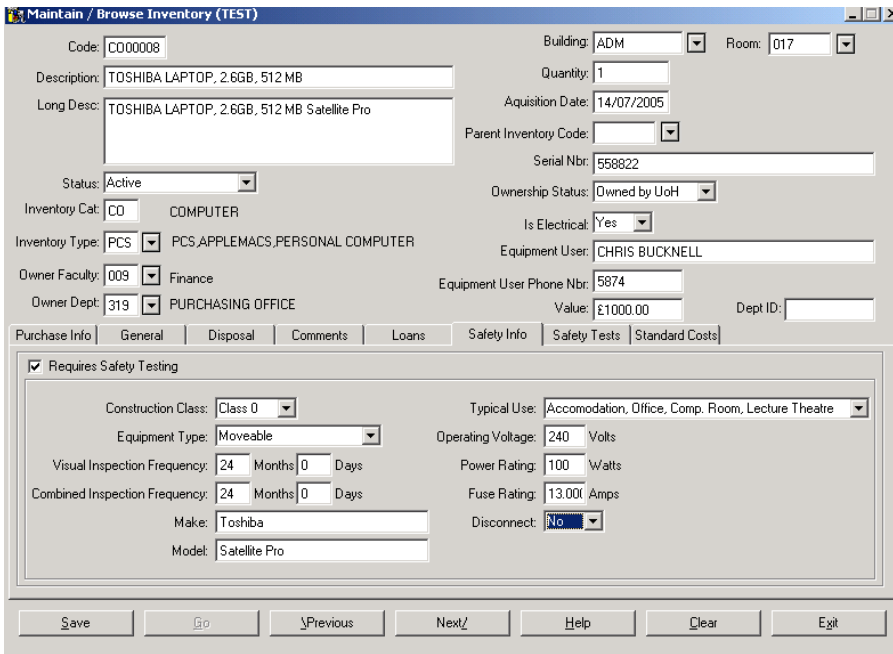
On every item of inventory that is electrical you need to select 'Yes' on the inventory header record.

To record safety information, click on the Safety Info Tab and check the box 'Requires Safety Testing' on the top left hand of the screen. Then complete the rest of the fields on this screen by following the instructions in the document provided by the Safety Office. If you have any queries on electrical safety testing you should contact the Safety Office on (46) 5165 for assistance.

Select **SAVE** to retain any information entered on completion.

Once the safety information screen has been completed, click on the 'Safety Tests' tab and enter the date of the safety testing and whether each area is a pass or fail. There are two types of test:

CIT – combined inspection and test

FVI - a formal visual inspection

Again, Select **SAVE** on completion.

2.6 Adding Comments

There is a screen available to enter any additional comments about an item of inventory that a department may wish to record. This is a free text area.

If you wish to add any additional comments relating to a particular piece of equipment, select **COMMENTS** tab and enter and additional details you wish to record.

When entered, select SAVE.

2.7   Editing Inventory

From time to time inventory records will require alteration or additional information adding to the record. For example, if an item is being moved from one room in a building to another, the user changes or, perhaps a maintenance contract has been taken out for a particular piece of equipment or the equipment has undergone a safety test and the data needs entering against the item.

To search for an existing item of inventory you can either

a) Use the Inventory Search Facility. Click on the next to the Code field to bring up a search screen. You will see in the left hand side of the screen all the Inventory Categories that you have permissions to create or edit. Click on the Category the inventory that you wish to edit will be contained within and all items will be displayed on the right hand side of the screen (see screen below).
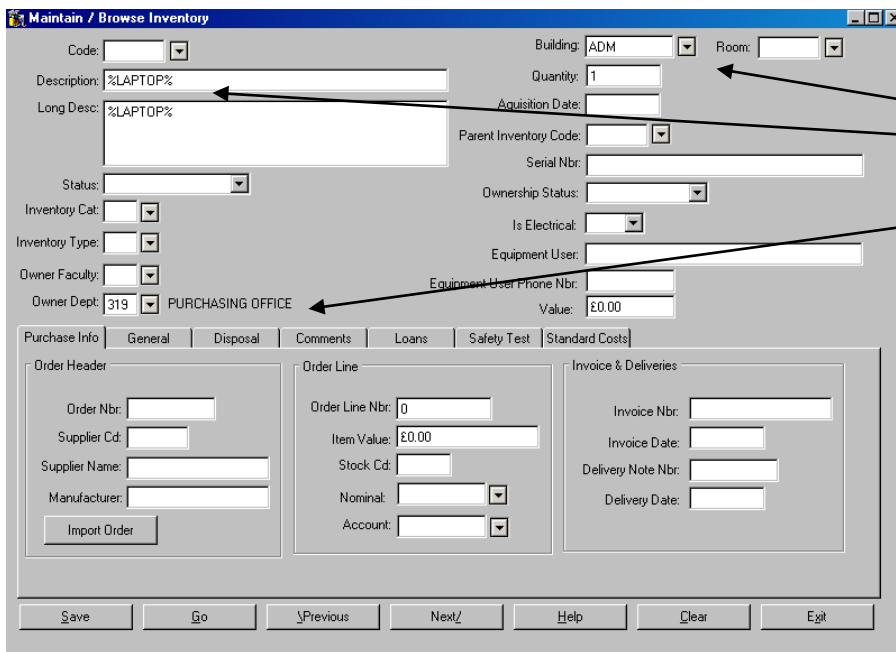
You can change the sort order of the information on the right hand side of the screen by clicking on the top header row of any column to sort. Double click the item to return it to the main screen ready for editing.
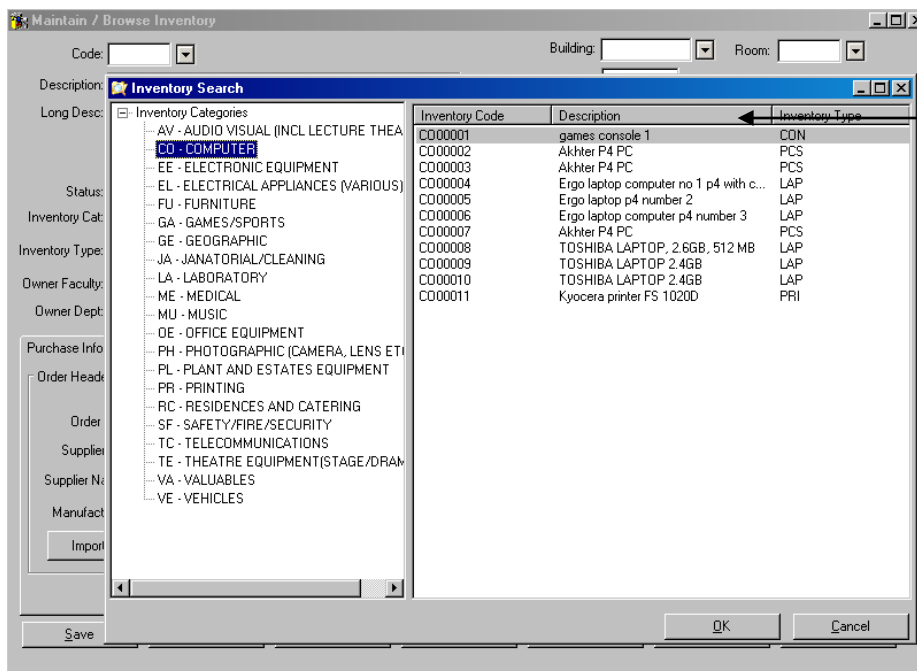
You can change the order that the inventory is displayed in by clicking on the header row to change the sort order

Or

b) You can enter some of the information into any of the fields on the main screen :

If you enter part of a description, use % before and after the search word to allow a fuzzy match.

2.7.1 Editing a single record within Maintain/Browse Inventory Screen

When you have entered in or called up the inventory code of the item you wish to amend (if you enter a known inventory code i.e. CO000011 you will have to click GO to recall the current details to the screen. Amend any of the fields that require changing. On completion select SAVE. If you have many items for updating at the same time there is a bulk edit / update facility - see below.

2.7.2 Editing multiple records

There is a facility to update multiple records at one time so that if, for example all the equipment in one room is moving to another room this can be done easily and quickly. Select 'Multiple Update' from the Inventory Icon and follow these instructions:

In order to retrieve records for multiple editing you need to enter search criteria into the header fields (you do not need to enter the wildcard %) Once you have entered these, click 'Go' to retrieve all the records that match the criteria.

2.7.2.1 Editing multiple individual records or fields

Click on, or tab to the column and row where you want a record changing and enter the new information (such as change of building or room or department). Once you have altered all the fields you wish on a line or more than one line, click 'save'.

Enter the criteria you wish to search by, then 'Go'

Tab to or click on the record you wish to change and amend the status, faculty, department, building room etc. Then 'Save'

2.7.2.2 Editing many records at once

You can also use this screen to update records en masse by changing the information in one column and then clicking on 'Apply to All'; this will update all the rows to the information you have entered in the highlighted column. Your cursor must be in the cell (the column and row). Before you 'save' the information make sure your changes are correct. If not, click on 'Undo' to revert to the information you had entered before you tried to 'Apply to All'

For example if all the equipment in room 031A has moved to 031B you can search for the equipment in 031A and then change the first line of inventory displayed to room to 031B and then click on 'Apply to All' to change all the other items to room 031B and then click 'save'.

This feature is only available to the Main Department Users and to Super Users of the system and not to standard inventory users.

2.8 Disposal of Inventory

When the equipment/inventory is no longer used or needs to be disposed of, you must record the disposal details on the inventory system. It is essential that this requirement is complied with as the EU legislation regarding the disposal of electrical or electronic equipment came into force in August 2005. Further details about this legislation and the University's Equipment Disposal Policy and Procedures can be found in the Financial Regulations or on the **Purchasing website.** A disposal Pro-Forma is available from Amanda Peacock in Accounting Services. A copy of this form is attached in the appendix.

Those fields noted as M = mandatory fields

M	Date of disposal	Enter date of disposal
M	Disposal Method	Chose method of disposal from drop down list
	Sold To	If item sold or donated, enter name of buyer / recipient
M	WEEE Category	Chose from drop down list.
	Value obtained on disposal	If you received an income when you sold/disposed on the item of inventory, enter the amount here.
	Cost of disposal	Enter cost in whole pounds. Nil if sold and realisation achieved.
	Value credited to nominal	Enter nominal credited or use the search facility to select a valid/current Dream/Financial code.
	Value credited to Account	Enter account credited or use the search facility to select a valid/current Dream/Financial code.
	Weight of Equipment	Enter weight of item in KGS if known
M	Hazardous?	Y/N
M	Holds sensitive data?	Enter yes or no - or choose from drop down list
M	If yes to sensitive data, has item been decommissioned / cleaned?	Enter yes or no - or choose from drop down list
M	WEEE category	Enter appropriate WEEE category from the drop down list (select N/A for inventory that is not electrical, electronic or holds sensitive data)

Remember to **SAVE** on completion of the updates.

3.0   <u>Importing inventory from a spreadsheet into the Inventory System</u>

There is the facility to upload inventory details from an excel spreadsheet using a template which can be found on either the Purchasing Website or the Insurance Website under

Inventory System. If you use this it is **ESSENTIAL** that you complete all the columns as instructed. (Spreadsheet attached for your records only, hard copies of this document will not be accepted.)

Once you have your spreadsheet finalised you are then in a position to import the details onto the system and for the system to allocate Inventory Codes to them. Email the Spreadsheet in full to h.a.mccreath@hull.ac.uk for the equipment to be uploaded. You will then receive an email confirming the upload has either been successful or unsuccessful. If unsuccessful you will be advised of the reasons why it has failed.

4.0   Inventory Reports

The following reports are available to you:
- Department Inventory Report
- Disposals Report
- Inventory on Loan Report

You can produce a report detailing all inventory/equipment plant by Asset Owner (i.e. 106 = Geography, 315 = Finance). The report can be as wide or as narrow as you want depending on what type of information you are trying to capture. This report can be for all Asset Categories and Equipment Types or can be broken down so that a report only by a particular Asset Category (CO=Computers, ME= Medical) or only by a particular Equipment Type (i.e. AUD = Audio Visual, COP = photocopiers) or only by the building in which the equipment/inventory is housed. You can also report on equipment/inventory that had an original value between a range of prices.

Select **REPORTS MENU**, then select the report you wish to run, complete the screen and then click on **GO** for a report in word format or on **EXCEL** if you want the report to be in excel format so that you can manipulate the data if required.

5.0   Inventory/Equipment Coding Structure

The following Inventory/Equipment Coding Structure has been used. Please note that you can only use an inventory type that belongs within an Inventory category.

Category	Inventory Type Description	Type	Inventory Category Type Description
AV	AUDIO VISUAL (INCL LECTURE THEATRE)	AUD	AUDIO,RADIO, HIFI, AMPLIFIER
AV	AUDIO VISUAL (INCL LECTURE THEATRE)	LTE	THEATRE EQUIPMENT GENERAL
AV	AUDIO VISUAL (INCL LECTURE THEATRE)	PRJ	OVERHEAD/DATA PROJECTOR
AV	AUDIO VISUAL (INCL LECTURE THEATRE)	VIS	TV,VIDEO,DVD,
CO	COMPUTER	CON	GAMES CONSOLES
CO	COMPUTER	DOC	DOCKING STATION
CO	COMPUTER	HDD	HARD DRIVE, CPU ETC
CO	COMPUTER	LAP	LAPTOP, PALMTOP, NOTEBOOK
CO	COMPUTER	MON	MONITOR
CO	COMPUTER	MOU	MOUSE
CO	COMPUTER	OTH	OTHER COMPUTER EQUIPMENT

CO	COMPUTER	PCS	PCS,APPLEMACS,PERSONAL COMPUTER
CO	COMPUTER	PDA	PDA, HANDHELDS
CO	COMPUTER	PRI	PRINTER, LASER, DESK JET, DOT MATRIX
CO	COMPUTER	SCA	SCANNER
CO	COMPUTER	SER	SERVER/MAINFRAME
CO	COMPUTER	SOF	SOFTWARE
CO	COMPUTER	WOR	WORKSTATION,SUN,SILICON,APOLLO ETC
EE	ELECTRONIC EQUIPMENT	ELE	ELECTRONIC EQUIPMENT
EL	ELECTRICAL APPLIANCES (VARIOUS)	COE	COIN OPERATED EQUIPMENT
EL	ELECTRICAL APPLIANCES (VARIOUS)	HEA	HEATING APPLIANCES
EL	ELECTRICAL APPLIANCES (VARIOUS)	LIG	LIGHTING
EL	ELECTRICAL APPLIANCES (VARIOUS)	MEA	MEASURING EQUIPMENT
EL	ELECTRICAL APPLIANCES (VARIOUS)	TES	TEST EQUIPMENT
EL	ELECTRICAL APPLIANCES (VARIOUS)	TLS	POWER TOOLS
FU	FURNITURE	CHA	SEATING,OFFICE/RESIDENTIAL
FU	FURNITURE	DIN	DINING/BAR FURNITURE
FU	FURNITURE	FLR	FLOORING
FU	FURNITURE	OFF	OFFICE FURNITURE
FU	FURNITURE	RES	RESIDENTIAL FURNITURE
FU	FURNITURE	STO	STORAGE FURNITURE
GA	GAMES/SPORTS	GAM	GAMES EQUIPMENT
GA	GAMES/SPORTS	SPT	SPORTS EQUIPMENT
GE	GEOGRAPHIC	GEO	GEOGRAPHIC EQUIPMENT
JA	JANATORIAL/CLEANING	CLE	OTHER CLEANING EQUIPMENT
JA	JANATORIAL/CLEANING	FLC	FLOOR CLEANING, POLISHING ETC
LA	LABORATORY	MIC	MICROSCOPE
LA	LABORATORY	SCI	SCIENTIFIC GENERAL
LA	LABORATORY	SPC	SPECTROMETER
ME	MEDICAL	MED	MEDICAL EQUIPMENT
MU	MUSIC	MSC	MUSICAL INSTRUMENT
OE	OFFICE EQUIPMENT	CAL	CALCULATOR
OE	OFFICE EQUIPMENT	CLK	CLOCK, TIMEPIECE
OE	OFFICE EQUIPMENT	COP	PHOTOCOPIER
OE	OFFICE EQUIPMENT	DFA	DESK,OFFICE FANS
OE	OFFICE EQUIPMENT	FAX	FACSIMILE MACHINE
OE	OFFICE EQUIPMENT	MIS	MISCELLANEOUS OFFICE EQUIPMENT
OE	OFFICE EQUIPMENT	SHR	SHREDDER
OE	OFFICE EQUIPMENT	TYP	TYPEWRITERS
PH	PHOTOGRAPHIC (CAMERA, LENS ETC)	PHO	PHOTOGRAPHIC EQUIPMENT (CAMERA, LENS ETC
PH	PHOTOGRAPHIC (CAMERA, LENS ETC)	PRO	PHOTOPROCESSING EQUIPMENT
PL	PLANT AND ESTATES EQUIPMENT	AIR	AIRCONDITIONING
PL	PLANT AND ESTATES EQUIPMENT	BMS	BUILDING MANAGEMENT SYSTEMS
PL	PLANT AND ESTATES EQUIPMENT	FLT	HANDLING EQUIPMENT
PL	PLANT AND ESTATES EQUIPMENT	GAR	GARDENING EQUIPMENT
PL	PLANT AND ESTATES EQUIPMENT	PLA	PLANT(LIFTS,AIRCON,BOIL,MOT,ELEC
PR	PRINTING	PRT	PRINTING EQUIPMENT (PRINT ROOM)
RC	RESIDENCES AND CATERING	BAR	BAR EQUIPMENT
RC	RESIDENCES AND CATERING	CAS	CASH REGISTERS
RC	RESIDENCES AND CATERING	KIT	KITCHEN EQUIPMENT
RC	RESIDENCES AND CATERING	REF	REFRIGERATION EQUIPMENT
RC	RESIDENCES AND CATERING	VEN	VENDING MACHINE
SF	SAFETY/FIRE/SECURITY	CCT	CCTV EQUIPMENT
SF	SAFETY/FIRE/SECURITY	FIR	FIRE FIGHTING EQUIPMENT

SF	SAFETY/FIRE/SECURITY	SAF	SAFETY EQUIPMENT
SF	SAFETY/FIRE/SECURITY	SEC	SECURITY EQUIPMENT
TC	TELECOMMUNICATIONS	MOB	MOBILE TELEPHONES
TC	TELECOMMUNICATIONS	PAY	PAYPHONE
TC	TELECOMMUNICATIONS	PHN	TELEPHONE HANDSETS/ANSWERMACHINES
TC	TELECOMMUNICATIONS	RAD	2 WAY RADIOS
TC	TELECOMMUNICATIONS	SWT	TELEPHONE SWITCHBOARD,EXCHANGE
TC	TELECOMMUNICATIONS	TCM	TELECOMMUNICATIONS, OTHER
TC	TELECOMMUNICATIONS	TEL	TELEPHONES ETC
TE	THEATRE EQUIPMENT(STAGE/DRAMA)	SOU	SOUND EQUIPMENT
TE	THEATRE EQUIPMENT(STAGE/DRAMA)	TEO	THEATRE EQUIPMENT - MISCELLANEOUS
TE	THEATRE EQUIPMENT(STAGE/DRAMA)	THE	THEATRE LIGHTING
VA	VALUABLES	ACO	ART - ARTS COUNCIL
VA	VALUABLES	ACT	ART - CONTEMPORARY
VA	VALUABLES	AOL	ART - ON LOAN
VA	VALUABLES	APT	ART - PORTRAITS
VA	VALUABLES	ART	ART - COLLECTION
VA	VALUABLES	CER	CERAMICS COLLECTION
VA	VALUABLES	COI	COIN COLLECTIONS
VA	VALUABLES	SIL	SILVER COLLECTIONS
VA	VALUABLES	VAL	MISCELLANEOUS VALUABLES
VE	VEHICLES	CAR	CAR
VE	VEHICLES	GEN	OTHER VEHICLES - ALL TYPES
VE	VEHICLES	OFR	OFF ROAD VEHICLE
VE	VEHICLES	VAN	VAN

6.0   Standard Costings

Some inventory you may own may have been in the department for a long time and you may not have details on the value of the inventory. On the inventory screen there is a tab **STANDARD COSTINGS**, this lists many common items of inventory and gives an indicative cost that you can use for the value of your, similar, item. These costs are a guide only.

7.0   Collecting Inventory Information.

A form for collecting inventory details has been produced and is available to download from the purchasing web site (inventory page) The use of this form will ensure that departments collect all the necessary information on each item. If a department is commencing on the collection of bulk inventory items not yet on the Inventory System they can complete this Excel ™spreadsheet and it can be imported directly into the Inventory System or manually entered if preferred.

8.0   Sample Form for use to record inventory changes

In order to ensure that the inventory records remain up to date, it is essential that people know who to inform about moves, disposal or acquisition of   inventory. Below is an example of a form that could be used by staff to communicate inventory changes:

CHANGES TO INVENTORY REGISTER

To:	
From:	

Date:		Tel:	

Please note the following equipment changes. Please amend the Inventory Register, and arrange the appropriate action, ensuring that all WEEE disposal forms are completed for.*

	Item 1	Item 2	Item 3
Type of Change**			
Type of Equipment			
Description of Equipment/Model			
Serial No			
Location From			
Location To			
Room No (From/To)			
Department			
Date of Disposal/Purchase			
Value (New Item or Disposal)			
Order Number			
Electrical Testing Required?			
Other Comments			
(Office use only) Inventory Ref			

* *Please see example on back of form for information on how to complete it.*
** **Change Categories are: Move, Disposal or New Item**

(Office Use Only) **Actioned by:**		**Date Actioned:**	

Example of completed form:

To:	*Name and Department*		
From:	*Name and Department*		
Date:	*Date*	Tel:	*Your Extn No*

Please note the following equipment changes. Please amend the Inventory Register, and arrange the appropriate action, ensuring that all WEEE disposal forms are completed for.*

	Item 1	Item 2	Item 3
Type of Change	Move	Disposal	New Item
Type of Equipment	PC Tower	PC Desk top	Mouse
Description of Equipment/Model	Pentium P4 3.0 Gb	BBC Computer	Belkin Wireless
Serial No	ABC123456789	987654321	K7SF8E849MSE
Location From	Venn	Larkin	
Location To	Venn		53 Salmon Grove
Room No (From/To)	031A to 220	220	003
Department	Finance	History	Facilities Directorate
Date of Disposal/Purchase	n/a	1/1/08	n/a
Value (New Item or Disposal)		0.00	£10.99
Order No			XC123456
Electrical Testing Required?	n/a	No	n/a
Other Comments	Move of Office, Location change only	Obsolete equipment. Disposed of using University WEEE disposal methods.	New equipment for A N Other
(Office use only) Inventory Ref			

x:\facilities directorate\kerry harrison\inventory\changes to inventory register.docx

ACADEMIC SERVICES - *CORPORATE SYSTEMS*
USER REGISTRATION FORM for
ASSETS & INVENTORY

FULL NAME	
COMPUTER CENTRE USER ID	
DEPARTMENT	
PAYROLL NUMBER	
TELEPHONE NUMBER	**01482. 46**
E-MAIL ADDRESS	
Do you already have access to *CORPORATE SYSTEMS*? Other *CORPORATE SYSTEMS* that you may have registered for are: Admissions, Purchasing, Personnel etc.	**YES [ ] NO [ ]**

All		LA Laboratory		RE Religious Items	
CO Computers		JA Janitorial		GA Games/Sports	
VA Valuables		MU Music		EE Electronic	
OE Office Equipment		LT Lecture Theatre		ME Medical	
FU Furniture		PR Printing/Xeroxing		HA Halls & Catering	
VE Vehicles		SF Safety/Fire		GE Geographic	
PL Plant		TE Theatre Equipment		PH Photographic	

Please give any further details that may be useful:.

Authorisation of Head of Department/Section or Service for this person to be allowed access to the systems named	**Signature:** **Date:**
Please return completed form to	**Helen McCreath – *INSURANCE OFFICE***

For Inventory Systems Use Only	
Asset User Permission Group	
Authorisation Date	
Signature	

For Corporate Systems Use Only	
User Password	
Authorisation Date	
Signature	

Notes:

1   The Payroll Number must be completed. This can be obtained from the Staff Intranet under Staff, Update your personnel details.

2   Please complete a form for each application. The completed form should be sent to the Inventory System Administrator who will allocate your application permissions.

3   If you already have access to Corporate Systems, the Inventory System Administrator will be able to complete the registration process.

4   If you do not already have access to Corporate Systems the Inventory System Administrator will set-up your application permissions and forward the form to Corporate Systems who will allocate a password.

5   If you do not already have access to Corporate Systems and are applying for access to several applications, it is only necessary to indicate on one form that you do not have access to Corporate Systems.

6   Once the set-up process is complete you will be notified by email.

7   You must have a valid contract of employment in order to register. When you leave the University access will automatically be terminated.

8   Please contact the Inventory System Administrator should you change jobs or move to another department.

REQUEST FOR REMOVAL OF WEEE (WASTE ELECTRICAL, ELECTRONIC OR EQUIPMENT CONTAINING BATTERIES ETC)

To	Chris King, Facilities	Date of Request	
(delete as appropriate)	Sharon O'Flynn, Computer Centre		
	Shaun Wadsworth, Scarborough		
From Name		From Department	

Equipment Disposal Codes:					
IT Equipment (001)	Refrigerator/Freezer (004)	Scientific/Medical/Research Equip(007)	Televisions (010)	Sports & Leisure Equip & Toys(013)	Clock/Calculator (016)
Lighting Equipment (002)	Catering Equipment (005)	Telecommunications Equipment (008)	Flourescent Lamps and tubes (011)	Monitoring & Control Instruments (014)	Other Equipment (017)
Small Appliances (003)	Automatic Dispensers (006)	General Office Equipment (009)	Electric and Electronic Tools (012)	Audio Visual Equipment (015)	

Brief Description	Type of Equipment to be disposed of (enter code from above list)	Inventory Code	Date of Acquisition	Date of Disposal	Value of Equipment when purchased	Weight of Equipment (approx Kg)	Is item Hazardous Y/N	If Y, details of hazards	Has an alternative to disposal as waste for re-cycling been considered? (i.e. sale/donation etc)
Hard Drive	*001*	*i.e. C123456*	*01/08/2003*	*01/09/2005*	*£1,000.00*	*6.00*	*N*	*N/A*	*NO*
Samsung Fax	Telecommunications Equipment (008)	oe00160	14/02/2002	20/09/2007	£160.00	4.00	n		yes

For Facilities/Computer Centre use only:	
Date Equipment Disposed of	
Disposed of with which Contractor	
Cost to dispose to recylcer	