

Physical Inventory

Previously the TBAR004 Inventory Verification List has been provided for your department each fiscal year to take an account of all the equipment the university is maintaining on its books. At this time we plan to continue providing you with this list, but many of the procedures for the Physical Inventory have changed. The FY04 Physical Inventory was completed using the Protégé Incircuit Scan & Validate System. All assets were retagged with a barcode tag in order to be read by our barcode scanners. From now on the Physical Inventory will be scheduled throughout the year rather than all at the same time. A schedule will be set up to provide a specific time for every department. Each department must complete their inventory within the allotted time in order for all departments to be accommodated. We request that you follow these important procedures in order to correctly complete the physical inventory:

1. About a week before your scheduled time for inventory, check your inventory list to see if any special arrangements should be made for certain items (laptops, cameras brought in; planning for items in the field, etc.). Any item not scanned will show up as missing.
2. At the scheduled time, you will go to the Property Management office (Room 105, College Hall) and sign out the scanner you will use for the physical inventory. When your inventory is completed you will return the scanner to Property Management and sign back in. Once the information on the scanner has been uploaded by Property Management, you may log in to Protégé <http://www.scanandvalidate.com> and look at the data for your department. This will give you easy access to the details for your department inventory.
3. Complete and return the 'Equipment Deletion/Transfer Notices' or 'Missing or Stolen Property Report' as needed for 'NoScan' items on your inventory.
4. Department Head, the Alternate APO, and any other employee actually verifying the physical inventory should sign the Certification of Physical Inventory of Property. Please use the lines on this page to make a note of any bar-coded items you have that are not showing on your inventory.

Property Management appreciates your full cooperation in getting this done correctly and promptly. Your annual Certification of Physical Inventory needs to be returned no later than your specifically assigned due date each year.

Instructions for Protégé Incircuit Scan and Validate Website

At the welcome screen use the following:

Login ID = first initial and last name of Alt APO (all lower case)
Password = initials of Alt APO (lower case)
Database = tamuk (lower case)

Click on "Login".

Click “View subsets”.

Click on Dept name. (Ignore last sync date and sync user)

Click on “Approved” or “Unapproved”. (This will show details for the scan of you department)

Click “View Reports”. Then click on the type of report you want to see.

Click “Logoff” when done.

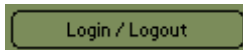
Instructions for Protégé Bar Code Scanner

Please use the stylus that is included with the scanner. Other items could mar the surface of the screen.

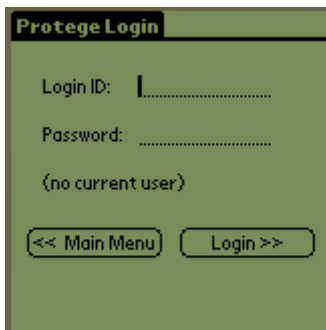
When you turn on the scanner the following screen should appear:



The first thing you should do is look at the bottom of the screen and verify that the scanner is set up for your department. If this screen does not appear when you turn on the scanner, tap on the house (go home), then click on the icon labeled Protégé. If you accidentally log out while you have the scanner, use the 'login' button to log in again.



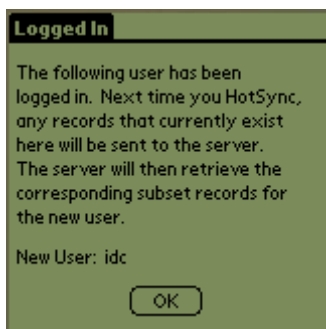
Tapping on this button will produce the following screen:



Log in to the system using the same ID and Password you use to access the Scan & Validate application in the web-browser. This ID/password will be provided by the System Administrator.

When the Login button is pressed, the system will automatically log the current user out of the application and prompt for a new log in ID. Protégé will not allow access beyond the Login screen until a Login ID and Password are entered.

Once a Login ID and Password are entered, the following screen will appear:



This screen explains that the data on the scanner will be sent to the database server, then property items from your current subset will be retrieved down to the scanner.

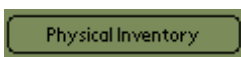
Because the system is administered from a central location, the Login ID and Password entered on the scanner are not validated until the scanner is synchronized with the main

system. This means that the scanner will allow access to the data currently on the scanner even if you make a mistake on the Login ID. However, if you do not enter a valid ID and Password the scanner will not synchronize properly.

NOTE: The user ID and Password are case sensitive.

PHYSICAL INVENTORY

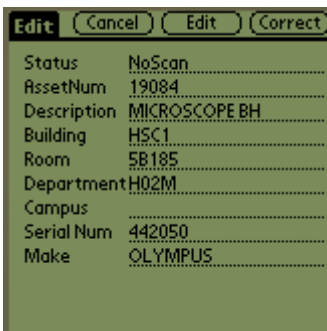
From the main menu, select "Physical Inventory".



The Physical Inventory module facilitates the inventory process. Tapping this button will produce the following screen:



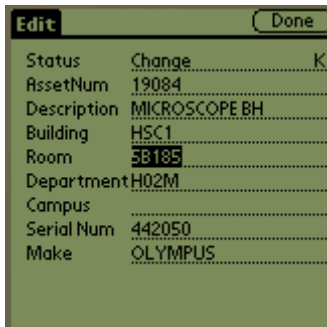
This screen will prompt you to scan the Asset Number (bar code tag). Once an item is successfully scanned, Protégé will display the detail record for the matched item.



As items are scanned, their records are displayed and can be confirmed. When data is first assigned to a Subset, Protégé 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 display, it can be marked Correct by pressing the Correct button.

This will assign a status of Correct to this item and automatically prompt you to scan the next item.

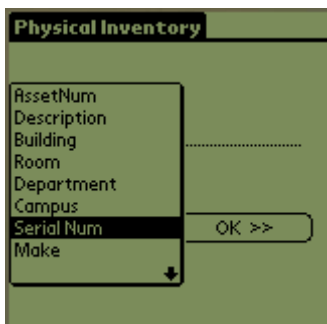
If the location (room number and name of person using the equipment) or the serial number in the item detail does not match the “real-world”, the item’s record can be modified on the spot by pressing the Edit button.



Pressing the Edit button will automatically set the Status to “Change”, and allow you to edit whatever needs to be updated. Later, the system will display the original information alongside of the changed information so the edit can be approved. When you are finished, simply press the Done button and Protégé will prompt you to scan the next item.



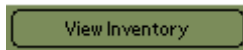
Note that the prompt for the field value label is preceded by a downward pointing arrow. Tapping on this arrow will produce the following screen:



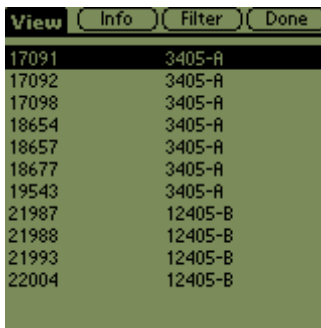
Protégé allows you to search the scanner database by any field available in that database. If the tag is missing or damaged, you can search for the item using the serial number. If the serial number is bar coded, you can simply scan it in.

VIEW INVENTORY

From the main menu select "View Inventory".



The "View Inventory" module provides filter utilities and summary information on the Physical Inventory. Tapping the View Inventory button from the main menu will produce the following screen:

A screenshot of the "View Inventory" screen. It features a dark green background with a white header bar containing four buttons: "View", "Info", "Filter", and "Done". Below the header is a list of inventory items with two columns: a serial number and a tag ID. The items are: 17091 (3405-A), 17092 (3405-A), 17098 (3405-A), 18654 (3405-A), 18657 (3405-A), 18677 (3405-A), 19543 (3405-A), 21987 (12405-B), 21988 (12405-B), 21993 (12405-B), and 22004 (12405-B).

Serial Number	Tag ID
17091	3405-A
17092	3405-A
17098	3405-A
18654	3405-A
18657	3405-A
18677	3405-A
19543	3405-A
21987	12405-B
21988	12405-B
21993	12405-B
22004	12405-B

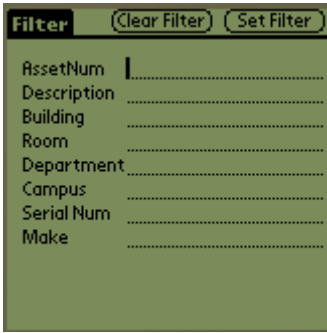
When first accessed, View Inventory displays all the inventory items from your current subset on the scanner (whether you've validated the item yet or not). From this screen, you can either set a filter on the data or press the Info button to see a summary screen. Pressing the Info button will display the following screen:

A screenshot of the "Filter Info" screen. It has a dark green background with a white header bar containing the text "Filter Info". Below the header are five rows, each with a label and a number in a rounded rectangular button: "NoScan Items: 213", "Changed Items: 1", "Correct Items: 0", "New Items: 0", and "Total Items: 214". At the bottom center is an "OK" button.

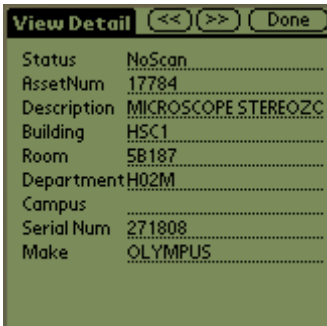
NoScan Items:	213
Changed Items:	1
Correct Items:	0
New Items:	0
Total Items:	214

This example subset has 214 total items. The filter Info screen automatically separates the records by status and provides a count for each status. To view the actual items in any status-subset, simply tap on the number-button. For example, tapping on the **213** in the NoScan Items row will display the list of all items not yet found in your current subset of data. This feature is especially useful when used in conjunction with the Filter.

Pressing the Filter button will produce the following screen:



From this screen, you can enter a value for any field in the scanner database to create a subset of all matches. For example, before leaving a building, you could set a filter on that building and then using the Info button, view all NoScan items in that building. This process can also be applied with multiple filters such as NoScan items in a particular room in a particular building.



Once a filter is set, you can use the scroll buttons at the top of the screen to check for all items that still need to be located in that room.

To reset a filter, simply click on the Filter again and press the Clear Filter button. At any point, clicking the Done button will bring you back to the main menu.

TEX. GOV'T CODE ANN. sec. 403.273(f), (g) (Vernon Supp. 1997) reads:

"(f) On the date prescribed by the comptroller, a state agency shall make a complete physical inventory of all property in its possession. The inventory must be completed once each year.

TEX. GOV'T CODE ANN. sec. 403.277 (Vernon Supp. 1997) reads:

"If a state agency fails to keep the records or fails to take the annual physical inventory required by this subchapter, the comptroller may refuse to draw warrants or initiate electronic funds transfers on behalf of the agency."