



FLORIDA
INTERNATIONAL
UNIVERSITY

PantherSoft Financials Upgrade Project Version 9.0

Asset Management

A thick, yellow, brushstroke-style underline that curves upwards at both ends, positioned below the 'Asset Management' text.

Agenda

AGENDA



- ✓ Handouts
- ✓ Quick Tips
- ✓ What's New in Asset Management
- ✓ Flow Chart
- ✓ BP- Notable Reminders
- ✓ Live Training on PantherSoft
- ✓ Hands on Activity - 9.0 via UPK
 - ✓ Know it- test yourself
- ✓ Q&As

Quick Tips

- ✓ Where to find a specific process- based on security
 - ✓ *Search Box:*

The image shows two side-by-side screenshots of the FIU website interface. The left screenshot shows the 'Menu' section with a search box containing the word 'asset'. The right screenshot shows the search results for 'asset', listing three items: 'Copy Existing Asset', 'Retire/Reinstate Asset', and 'Retire/Reinstate Non-Fin Asset'. Each item includes a brief description and a breadcrumb trail.

FIU
Personalize [Content](#) | [Layout](#)

Menu

Search:
asset

- ▷ My Favorites
- ▷ Student Administration
- ▷ Employee Self-Service
- ▷ Manager Self-Service
- ▷ Supplier Contracts
- ▷ Customers
- ▷ Products

FIU

Search

Enter search keywords separated by a space. Use quotes for any phrases. For example: Cities Countries 'United States'

New Search Search Within Results

asset [Customize Settings](#) [Search Tips](#)

[Hide Summaries](#) [Next >>](#)

Search Results

- [Copy Existing Asset](#)
Copy existing asset information to a new asset ID.
Home>Asset Management>Asset Transactions>Owned Assets>Copy Existing Asset
- [Retire/Reinstate Asset](#)
Retire and reinstate financial assets
Home>Asset Management>Asset Transactions>Asset Disposal>Retire/Reinstate Asset
- [Retire/Reinstate Non-Fin Asset](#)
Retire and reinstate non-financial assets
Home>Asset Management>Asset Transactions>Asset Disposal>Retire/Reinstate Non-Fin Asset

Quick Tips

- ✓ Where Can I Access UPK (User Productivity Kit)?
 - ✓ panthersoft.fiu.edu/financials
- ✓ You will be able to view:
 - ✓ Flow Charts by Module
 - ✓ Business Processes
 - ✓ Quick Reference Guides (Job Aids)
 - ✓ Training Guides
 - ✓ Online UPK player

What's New in Asset Management?

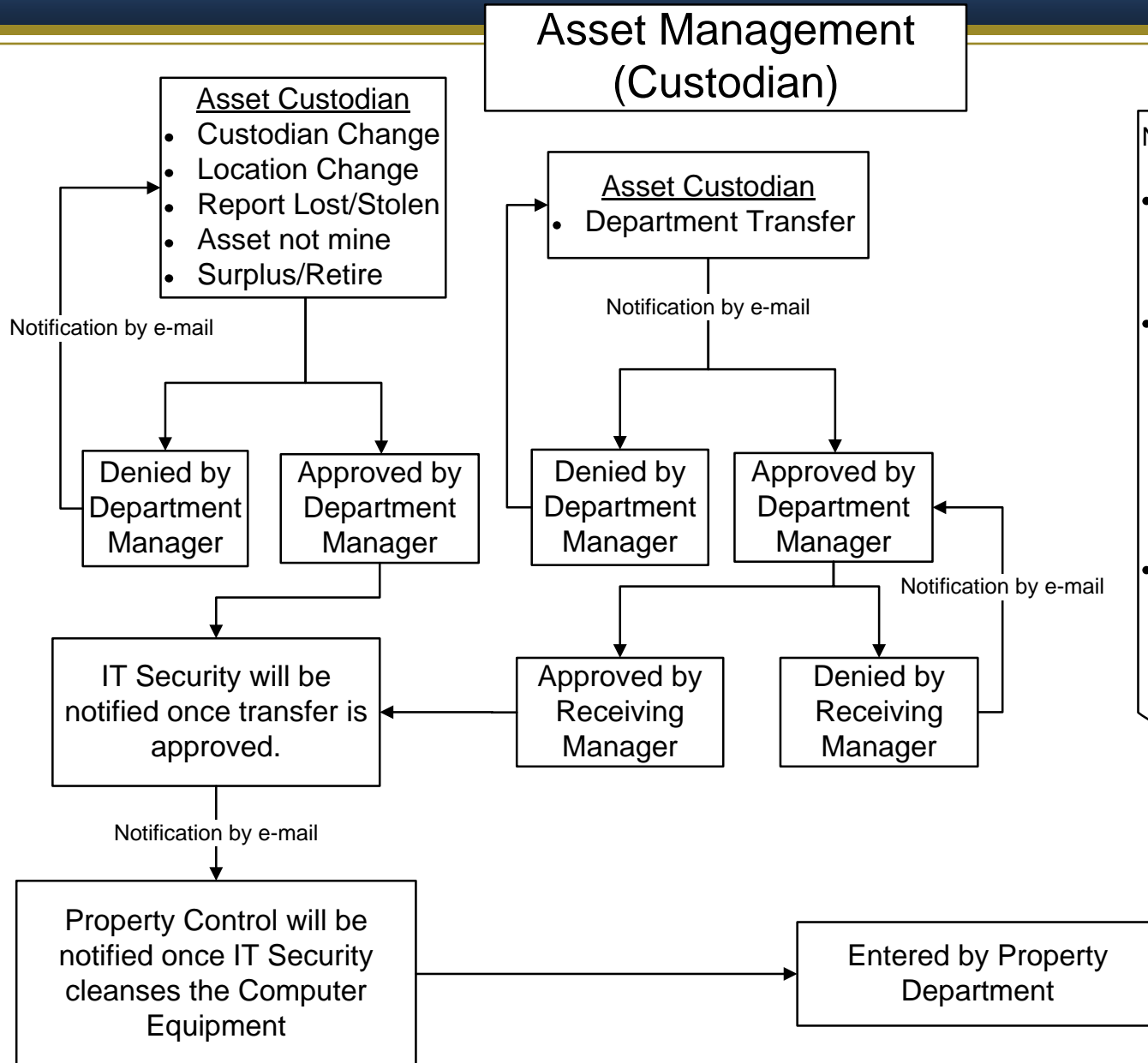
New module: Tracking an Asset is completely new to FIU.

Asset Management

- ✓ Logging On
- ✓ Adding Favorites
- ✓ Employee Self-Service
 - ✓ Transferring an Asset
 - ✓ Viewing Assets
 - ✓ Reporting Lost/Stolen Assets
- ✓ Manager Self-Service
 - ✓ View Department Assets
 - ✓ Approving Asset Transfers
 - ✓ Approve Reporting Lost/Stolen Assets

Flow Chart- Custodian

Asset Management (Custodian)

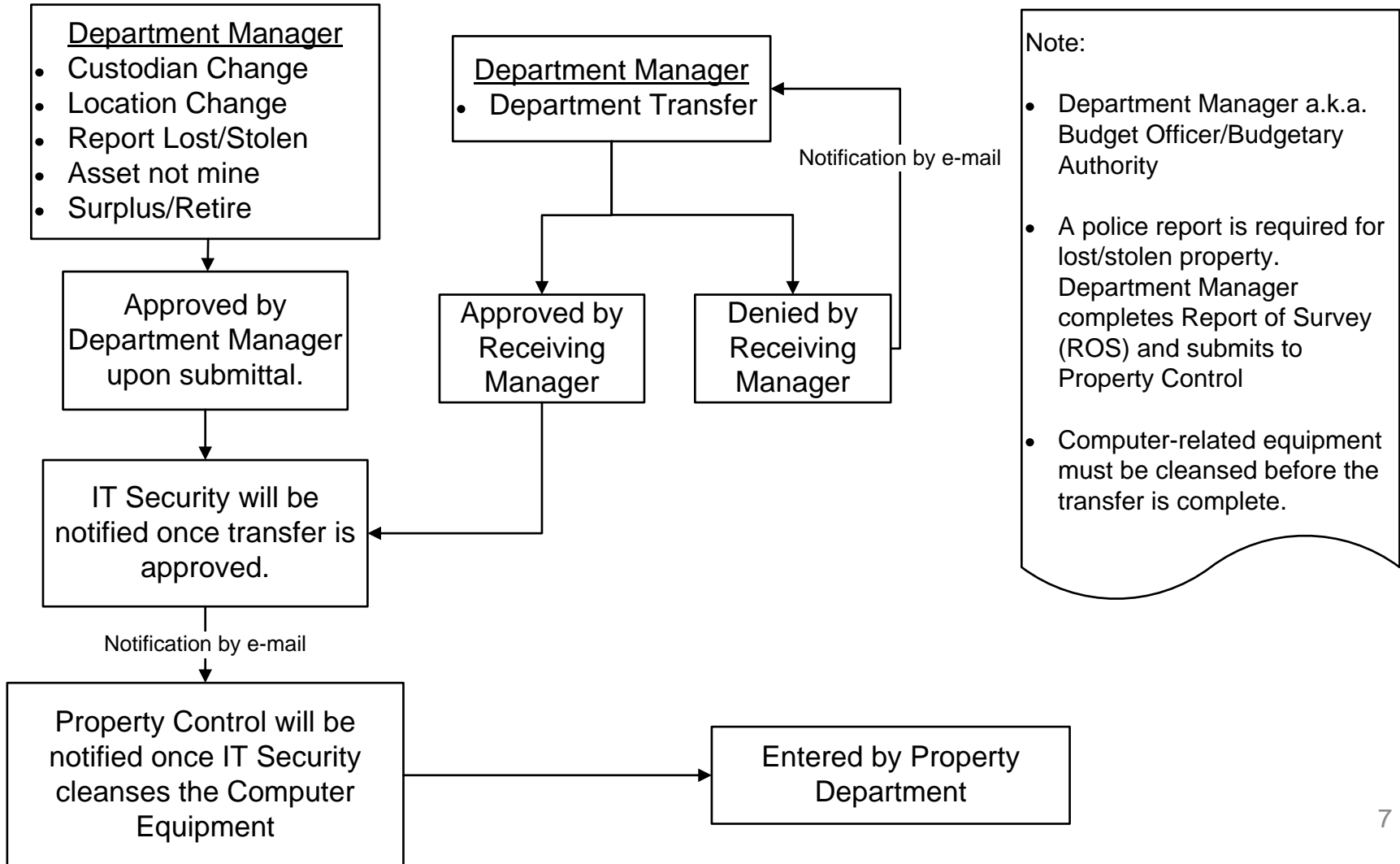


Note:

- Department Manager a.k.a. Budget Officer/ Budgetary Authority
- A police report is required for lost/stolen property. Department Manager completes Report of Survey (ROS) and submits to Property Control
- Computer-related equipment must be cleansed before the transfer is complete.

Flow Chart- Dept. Manager

Asset Management (Department Manager a.k.a. Budget Officer/Budgetary Authority)



Business Process

Notable Reminders

What is an Asset?

- ✓ Accountable Property – Tangible, movable, personal property with a value of \$1000 or more and which has a normal expected life of one year or more.
- ✓ "Attractive" Property – Accountable property, but is less than \$1000 in value. Items include: VCRs, cameras, printers, monitors, etc. items valued less than \$1000. This list is submitted yearly to the Office of Environmental Health & Safety.
- ✓ Computers Software and Related Equipment –Valued at \$1000 or more are listed in the property record with a special code. Items include: monitors, modems, disc drives, etc.

IT Security

- ✓ Any computer equipment with data must be cleansed before transferring. IT Security will contact the department to schedule data storage cleansing appointment.

Off Campus Use

- ✓ Property may be used off campus only if for the use of the University. Such removal shall be authorized by the Department's Accountable Officer and an Off Campus Form shall be furnished to Property Control for accountability.

Business Process

Notable Reminders-*continues*

Loss or Stolen:

- ✓ Notify the University's Public Safety Office or the appropriate law enforcement agency.
- ✓ The custodian will send a memo of the theft and a copy of the police report to the accountable Department Manager of this property.
- ✓ The Department Manager will report the loss to Property Control, along with the copy of the police report, including the statement of the person claiming the loss.

Mass Transfers:

- ✓ For Mass Transfers of Assets between Departments/Projects, Property Control should be notified via the Property Control Transfer form that is available on their Website <http://finance.fiu.edu/controller/forms.html>

Hands-on Activity

- ✓ After Demo, it will be your turn!
- ✓ Exercise provided - via UPK
- ✓ Go Live:
 - ✓ **July 13, 2009 - Monday**



Questions

