CAMPUS ASSET MANAGEMENT SYSTEM TRAINING 101

(Tips and Tricks, Version 1, 3/5/2010)

This Tips and Tricks document will preview five modules: 1) Profiles and Permissions, 2) Navigate CAMS, 3) Introduction of the Asset Detail screens, 4) Transfers and Disposals, and 5) Technical Requirements.

Module One: Profiles and Permissions

1) Profiles
   a) Equipment Management/General Account Office
      i) System Administrator, technical support for the application. Maria Lieggi
      ii) Campus Asset Management Administrator (CAMS-A) Jamie Wheat and Steve Ste Marie
   b) Department Users: (Custodian is the highest department level)
      i) Departmental Equipment Custodian (DEC), equivalent to Final Approver for EAMS Web
      ii) Departmental Equipment Administrator (DEA), equivalent to Property Administrator
      iii) Guest – Tip: everyone must register as a Guest first via Single Sign On, and then follow up with your DSA to request additional access.
   c) Surplus Sales
      i) Surplus Administrator
      ii) Surplus Operator

2) First time users READ THIS FIRST:
   a) How to access CAMS for the first time? All users must login to gain a Guest profile.
   b) Blink Business Tools will have a link to CAMS, click the link and you will taken to the Single Sign On (SSO) login page. Login and you will be directed to the SSO Welcome page, click the OK button to access CAMS as a Guest (this is the first step for CAMS access).

   c) Contact your DSA immediately following your login as a Guest to request additional access. Tip: know your custody codes, contact your MSO/Department Head for a list of the custody codes you will be responsible for and they should tell you your profile level as well.
   d) As a Guest you can view “only” the assets in the system and run reports.
   e) Once your DSA has assigned your profile to specific custody codes all Profile Edits are done by CAMS-Administrator in the Equipment Management office. Tip: know your custody codes, contact your
3) How are you set up in CAMS? By your guest level contact information. EQM has more details about each user based on custody codes and profiles.

4) How to access CAMS once you are set up with your user profile of DEC or DEA:
   a) Click the CAMS link on Blink Business Tools (CAMS).
   b) UCSD Single Sign On (SSO) just as you do to access Financial Link and other UCSD programs.
   c) The next screen is the CAMS (InCircuit) SSO Welcome page. Click the OK button to access CAMS
   d) The next screen is the Welcome page which allows you to quick search for an Asset.
Module Two: Navigate CAMS

1) Welcome Page: This is the main welcome display after you sign in to the application.
   a) The top of the screen contains the following links:
      - Home - returns you to this main welcome page
      - Help - opens a window with additional help about the current screen
      - Support - opens a window that allows you to send a message or question to technical support staff.
      - Sign Out - signs you out of the application when you are finished.
      Under these links are tabs that represent the menu of options available to you. If you click on any of these tabs, you will see a sub-menu listed under the tab with additional options.
   i) User Tabs are displayed and sub-tabs are displayed just below the main tab.
   ii) The first two regions on the screen contain the Quick Search and User Info boxes:

   - Quick Search - enter any portion of an asset number and then press the Enter key or click the Search button to retrieve a list of assets that have matching asset numbers. Note: the Tab key navigates you for one field to the next or you can click in the field with your mouse (Enter key does not tab to next field).

   (1) Tip – click Help for demo on how to use Quick Search. From the Welcome tab, Help explains what features are available from the Welcome screen, and from the Assets tab the Help function demonstrates in detail Quick Search, Advanced Search and Create an asset. Tutorials are specific to the tab you are on.

   ![Quick Search and User Info boxes](image)

   b) Quick Search vs. Assets tab Advance Search – enter a portion of the UCID or the entire UCID number to view the Asset by UCID # (Asset number).

   i) Two quick search options are available:
      (1) Quick Search from the Welcome screen (search default Asset Status of All).
      (2) Quick Search from the Assets tab (search Assets by default status of Not Inactive and Assets tab offers sub-tabs for Advance Search and Create).

      (a) From the Quick Search sub-tab you can search by UCID# or Description.

      (b) Asset Status is very important, and the Not Inactive status will be a very popular status search option. Not Inactive displays everything but Inactive assets (Disposals). Asset Status All will display every asset in the system.
(c) The more exact the UCID number the better your search will be with Quick Search.

ii) To view the Asset Detail record click the View icon.

iii) Quick Search also allows you to search multiple Assets. Enter the first part of the UCID number and view multiple Assets (see more details regarding Quick Search by clicking Help at the top of the screen).

**Asset Quick Search (click Help to see the tutorial video)**

This screen allows you to quickly search for assets based on their **asset number** or **description**. In the appropriate field, enter either the entire value or just a portion of the value and then either press the Enter key on your keyboard or click the Search button. The system will find assets that match your criteria and then display the results in a grid.

The **results grid** will display the first 15 matching assets. If there are more than 15 matching assets, you will see a link labeled "Next" at the bottom right of the grid. If you click on the Next link, the grid will show you the next 15 matching assets. You can also download the results of the grid to a spreadsheet by clicking the "Download" link on the bottom left of the grid. To view or edit a particular asset you see in the grid, click the icon display in front of the asset number.

There is also an **asset Status** drop-down listed at the top of the screen that allows you to choose which statuses to included in your filter. For example, if you choose “Inactive” from the drop-down, then the system will only return matching assets that have a status of “Inactive”.

iv) From Assets tab your options are Quick Search, or perform an Advanced Search, or Create a Non-Inventorial asset (Elective). Notice the Asset Status defaults to “Not Inactive” which means everything but Not Active (disposals) Assets.
• Click view next to the selected Asset to view the Asset Detail.

v) CAMS Feature: Download a worksheet of the assets searched by clicking the Download button.

(1) Tip: For introductions on how to use the Assets tab click the Help option at the top of the screen and watch the tutorial video presentations. Click the View row for specific video demonstrations related to Search and Edit Asset to tracking History, how to get Support notices to EQM and how to Run Reports.

(2) Click

<table>
<thead>
<tr>
<th>View</th>
<th>Video Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>🎥</td>
<td>Search for Assets</td>
</tr>
<tr>
<td>🎥</td>
<td>Edit an Asset</td>
</tr>
<tr>
<td>🎥</td>
<td>History/Audit Trail</td>
</tr>
<tr>
<td>🎥</td>
<td>Contact Support Team</td>
</tr>
<tr>
<td>🎥</td>
<td>Run Reports</td>
</tr>
</tbody>
</table>

1 - 5
Module Three: Introduction of the Asset Detail screens

1) Enter the UCID number or Description to view Asset Detail screen.
   
   a) **Enter a UCID number or Asset Description to quickly search and review the Asset Detail** (see screen shot of Asset Detail on the next page).

   (1) Tip: While on the Asset Detail screen click Help anytime to read and learn more about the functionality and features associated with the Asset Detail screen. Asset Detail Help explains how to edit an Asset, provides an overview of the *Types of Fields*, and provides an overview of the *Expandable Regions* at the bottom of the screen.

   (2) Tip: To report technical or functionality issues click on Support at the top of the screen. Explain in detail the issue you are having, complete all fields and click send to report the issue to the Support Team.

ii) **Remember,** if you edit the Asset record you must click the Save Asset button at the top of the screen.

b) **Expandable Regions:** located at the bottom of the Asset Detail Screen are explained on the next page.
**Expandable Regions at Bottom of Screen**

At the bottom of the screen there are additional regions that can be expanded to display additional information about the asset. Click the plus icon next to the region and it will expand to show additional information. The following is a list of common regions (but the regions you actually see on your screen depends on your permissions, so you may not see all of these):

**Accounting** - This region displays the accounting ledger for the asset and lists entries such as Original Acquisition, Upgrade, Depreciation, and Disposal. To view or edit the details about a particular entry, click the View icon on the beginning of the line.

**Documents & Images** - This region allows you to attach and view images and documents related to the asset. To view or edit an existing document or image, simply click on the small thumbnail of the image and a new window will open. To attach a new document or image, click the Insert File button and a new window will open and allow you to choose a file from your computer.

**History** - This region lists all changes made to the asset. Each line displays the following: Date/Time the change was made, the Field that was changed, the New and Old values for the field that was changed, the Username of the user that made the change, and the History Type (the type of change that was made, such as User Edit, Import, or Change Request).

**Validation** - The region displays information collected from bar code scanner during the inventory process. It displays the date/time the asset was scanned, the user that scanned it, and whether the asset information was correct as-is or was modified.

i) Accounting Region for Asset 096030927:

Next screen: Accounting Detail (future enhancement – add UCID number to the Accounting Detail screen)

ii) Documents & Images:
c) History Region – is view only, but you can download the detail to a worksheet.
d) **Validation Region** - Scan and Validate – more training at a later date.

i) Scan & Validate is end-to-end software for automating the asset inventory process. It works with scanners to automate the collection of inventory data in the field, but it’s much more than scanner software. Scan & Validate easy-to-use features automate the reconciliation, validation, reporting and all administrative oversight of your inventory.

ii) Scan and Validate presentation, click link below.


iii) Look for announcements for Scan and Validate training in the near future.

iv) Equipment Management will be sending a notice to request a completion of Physical Inventory very soon after go live of CAMS. Please watch for the announcement.
Module Four: Transfers and Disposals

1) Transfers:
   d) Three types of Transfers – Inter Departmental (UCSD campus only); Temporary Transfer (loan to another department at UCSD, not within your custody codes); Surplus Transfer Requests (all transfers to Surplus Sales) which include Assets (inventorial) and Elective assets (Non-Inventorial).

   e) Paper EIMRs and electronic EIMRs on EAMS Web will no longer be used to Transfer or Dispose of an Asset. At least not the way EIMRs exist in the current EAMS systems.

   f) Approvals: CAMS uses a strict automated process which requires an automated approval and automated receive system. Everything activity is tracked in the History region. No approval required for transferring assets within a department that has multiple custody codes (e.g. School of Medicine).

   a) EIMR numbers in EAMS are an eight digit number with the first two digits set at 99xxxxxx. The CAMS application will be using a new number sequence of 10001. Old EIMR number will stay with the original EIMR, but all Transfers and Disposals processed after March 8, 2010 will use the new number sequence of 10xxx.

   b) CAMS Transfers tab includes two distinct sub-tabs, “Transfer” and “Surplus.” First we will discuss the Transfer sub-tab and second we will discuss the Surplus sub-tab.

      i) Transfer sub-tab: this is the default sub-tab

         (1) Three regions to the Transfer sub-tab: Quick Search, Search Transfers and Create Transfer.

         (a) Tip: from the Transfers tab click Help for details regarding the Transfers sub-tab.

Transfers sub-tab

This screen allows you to search for transfers or initiate new transfers of assets.

Quick Search Transfers
To quickly search for a transfer by its Transfer Number, enter a Transfer Number into the field and press your Enter key or click the Search button.

Search Transfers
To perform a more advanced search on your transfers, click the plus icon on the Search Transfers region. This will open up the region and allow you to specify additional criteria.
To initiate a new transfer of one or more assets, click the plus icon on the Create Transfer region, enter the header information relevant to the transfer, then click the Create button. This will create the transfer header and then give you a new screen where you can specify the assets you are placing onto the transfer.

- Example of Create Transfer:

- Click the Create button to advance to Add Asset screen:
• Click Add Asset button to Approve the Transfer.
  
  o A DEA or DEC can create a Transfer.
  
  o The DEC required to approve a transfer outside your custody code range at UCSD (Interdepartmental). Custody transfer within your custody code group does not require approval or receipt approval.
  
  o The DEC is the person approving the Transfer, however they can delegate the task of creating the transfer to the DEA.

  
  • Click the Approval button to go the next step in processing the Transfer.
- The next screen allows you to edit the Approval Status and Save the change which will set the transfer up to be received by the receiving depart. Custody code changes at Receive.

- Note: A transfer will stay "waiting to be received" or "approved but not received" status until it’s received. The assets on the transfer will keep the status of In Transfer until the Transfer is received.
• **Waiting to be Received**

• Now the Asset is waiting to be “received” by the transfer to department. How do you Receive an Asset In Transfer? The process is as follows:
  
  o Enter the Transfer number or search Transfer status “Waiting to be Received” from the Transfers tab.
  
  o Review the transfer to confirm the Asset is the correct one and click the Receive button.
  
  o Next screen is the “Receive Asset” screen (see process on the next page).
  
  o Email confirmations will be sent out announcing the Asset was received.

• **Note:** A transfer will stay "waiting to be received" or "approved but not received" status until it's received. The assets on the transfer will keep the status of In Transfer until the Transfer is received.
• **Receive Asset process**
  - Modify Status by clicking the drop down and select “Received”
  - Receive Date is auto-populated
  - Enter Building number, use look up or type in the building code
  - Enter the Room number
  - Enter person responsible
  - Click Save to finalize the Receive process.
(Module Four continued)

2) Transfers to Surplus Sales:
   a) Transfers sub-tab “Surplus”
   b) The Surplus sub-tab relates specifically to Surplus Transfer Requests (STR).
   c) Surplus search options are the same processes as with the Transfer sub-tab.
   d) Surplus Transfer differs from Transfer in various ways, specifically with creating a Surplus Transfer Request.
   e) Note: no Tutorial Videos exist for Surplus at this time. Coming soon.

![Surplus Transfer Screen]

Surplus
This screen allows you to search for surplus transfers or initiate new surplus transfers of assets.

Quick Search Transfers
To quickly search for a surplus transfer by its Surplus Number, enter a Surplus Number into the field and press your Enter key or click the Search button.

Search Surplus
To perform a more advanced search on your surplus transfers, click the plus icon on the Search Surplus region. This will open up the region and allow you to specify additional criteria.

Insert Transfer
To initiate a new surplus transfer of one or more assets, click the plus icon on the Insert Surplus region, enter the header information relevant to the transfer, then click the Create button. This will create the transfer header and then give you a new screen where you can specify the assets you are placing onto the transfer.

![Insert Surplus Screen]
Step 1: Complete the form with as much detail as possible:

Step 2: Review information and click the Save button:

Step 3: The next screen is the Surplus Detail Screen (STR Header Information)

Note: If you enter a UCID number not in your custody code you will receive an error and you must re-enter a valid UCID #.
Step 4: Approve the Surplus Transfer: Department Only, no more EQM approvals. Tracked in History!

Step 5: Approval process is the same as the Transfer module discussed earlier (see Transfer above). Surplus Sales will Receive the Asset which will remove it from your custody code.

How to add a Non-Inventorial Asset to a Surplus Transfer (scenario: no NI record exists, creating an NI asset just for this STR, “on the fly”).

Step 6: Add a Non-Inventorial asset to STR #10046

   Step 6a: Add the NI Number if known.

   Step 6b: Click Create New Asset (NI only).
Step 7: Complete the Insert Surplus Elective Asset detail and click Save.

Step 7a: Must complete required fields (*)

Step 7b: Accounting cost can be $0.00 or please feel free to put a value.

Step 7c: Class code type is part of the description and multiple options will be offered in the lookup.

Step 7d: NI Equip No will be auto assigned at Save process.

Step 7e: Click Save & Done. NI asset will be automatically placed in the Surplus Transfer.

Step 8: View your NI asset. Open the NI asset by click the View icon to attach documents, pictures, worksheets, etc.

Tip: Use the back button to return to your Surplus Transfer, or make note of the Surplus Transfer number.

Tip: If you are sending a LOT of NI assets to surplus you must make the LOT similar items and attach a worksheet of each item. Description of NI LOT might read, “pallet of 5 computers.”

TIP: Notice there is no Approval button, click the refresh icon or press the F5 key!
Step 9: Approve the Surplus Transfer, click Cancel to return to the Transfers tab or click another Tab.

Step 10: Surplus Sales will contact you about pick schedule.

3) Disposals (see Business and Finance Bulletin 29, pp. 40-42)

This screen allows you to search for disposals or initiate new disposals of assets.

Quick Search Disposals
To quickly search for a disposals by its Disposal Number, enter a Disposal Number into the field and press your Enter key or click the Search button.

Search Disposal
To perform a more advanced search on your transfers, click the plus icon on the Search Transfers region. This will open up the region and allow you to specify additional criteria.

Create Disposal
To initiate a new disposal of one or more assets, click the plus icon on the Create Disposal region, enter the header information relevant to the disposal transfer, then click the Create button. This will create the transfer header and then give you a new screen where you can specify the assets you are placing onto the transfer.

To request a Disposal of an Asset (Inventorial Assets Only)

1) Click on the Disposal tab:

2) Open the Create Disposal region:
3) Enter the correct custody code, disposal method, and remarks:

4) Add Asset(s) to your disposal request:
5) Once the Add Assets to Disposals

a) CAMS-A will Approve the Disposal. Please attach any all documents required for the Disposal of an Asset according the BUS 29.
Module Five: Technical Requirements

- If using IE, must use version 7 or higher. For other browsers, reports are rendered as PDF so Adobe PDF Viewer must be installed. Also, if using IE the user must have all pop-up blockers turned off and the ability to install ActiveX installers. For other browsers, reports are rendered as PDF so Adobe PDF Viewer must be installed. This would cover MAC users. There are no limitations with Firefox except that the reports cannot be exported. The reports come up in Acrobat Viewer/Reader on Firefox just like any other browser (except for IE). They can be saved if need be, but in pdf format only.

Additional Equipment Management Information:

http://www.ucop.edu/ucophome/policies/bfb/bus29.html (download the BUS 29) The Business and Finance Bulletin 29 has many more links to assist you with understanding the rules associated with Equipment Management.

Fabrications: Fabrication Requests will stay with the same process as has existed with EAMS until further notice. We are working with InCircuit to finalize the enhancements for FABS. Please submit Fabrication Request Forms to EQM via MC 0953 or email them to eqm@ucsd.edu. We do plan to enhance the FAB process in the very near future.

UCOP Class Codes Link: http://eulid.ucop.edu/index.php

Facilities Link on Blink: Request access to Building Codes.