

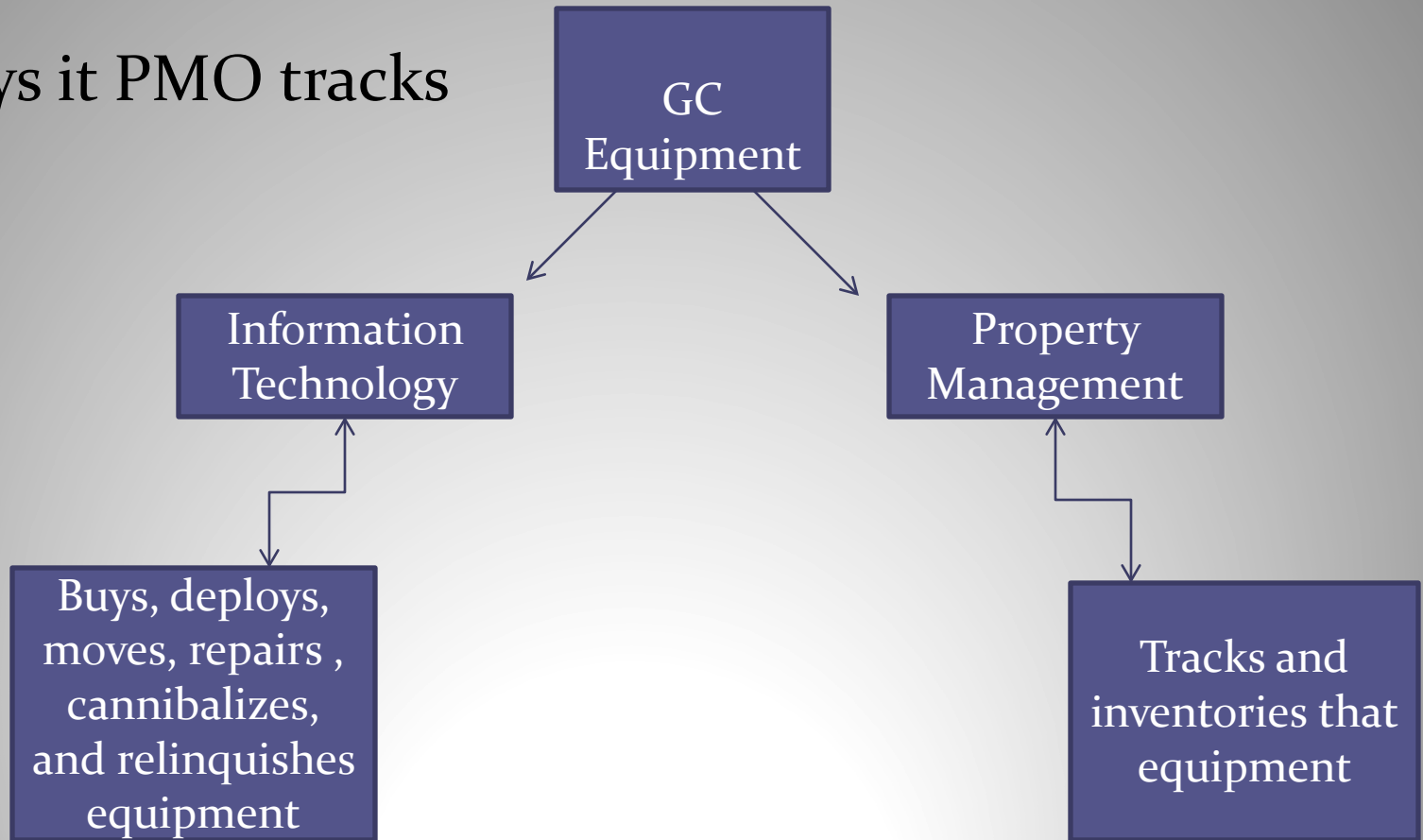
Welcome to the Information Technology (IT) and Property Management Office (PMO) Connection Workshop



by Nancy C. Saieh and Renee Marrero

You buy it We track it

IT buys it PMO tracks it!



Property Management Overview

- In 1984, CUNY was not in compliance with Federal regulations which required that all federally and non-federally funded equipment be tracked and inventoried. They were at risk of losing federal dollars for research and other sponsored activities.
- CUNY then became interested in improving the management of its assets for compliance with supervisory agencies; and for extracting meaningful data for decision making purposes.
- The State Division of Budget was also interested in the inventory information for the University's annual budget request.

• Three major components of Property Management were implemented:

1. Property Managers were hired at all senior colleges in 1984 and the community colleges joined the system in 1986.

2. “INSITE” an automated Property Management Tracking System was purchased from Massachusetts Institute of Technology (MIT). The system was tailored to our needs and is operating at the University Computer Center.

3. An appraisal firm was hired and conducted the initial inventory of all equipment at all the senior colleges.

University Controller's Office

- The PMO is under the guidance of the University Controller's Office at CUNY Central and under Assistant V.P. for Finance at the Graduate Center.
- The University Controller's Office responsibilities include:
 - General administration of the system.
 - Establishment of policies and procedures.
 - Coordination with other agencies (State, City, Research Foundation).
 - Oversight of University contracts associated with property management.
 - Monitoring of college compliance with policies and procedures.
 - Maintenance of the computerized property management system.

Property Management Responsibilities:

- The Property Management Office responsibilities include:
 - Establishing internal policy and procedures.
 - Identification and tagging of equipment.
 - Inputting, updating, and generating reports from the college database.
 - Maintaining the integrity of the database.
 - Reconciliation of property records with college, Tax Levy, Non-Tax Levy, Research Foundation, Dormitory Authority, Tech Fees, and Capital Funds financial records.
 - Coordination of the disposition of college equipment.
 - Conducting an annual inventory.
 - Property Removal Passes.
 - Equipment Move or Disposition Change Form.

Dollar Thresholds for Equipment

There are various dollar thresholds for tagging equipment:

- Computer & Computer related equipment have a \$1,000 threshold.
- Software and non-computer equipment have a threshold of \$5,000.

Fund Codes

- Equipment bought from the various fund codes below must be tagged within a 10 day period, otherwise the GC funds are at risk to be cut.
 - a) Tax Levy
 - b) Non-Tax Levy
 - c) Research Foundation
 - d) Dormitory Authority (DASNY)
 - e) Tech Fees
 - f) Capital

Equipment Tagging Requirements

PMO will only tag equipment if it meets the following criteria:

1. The dollar threshold for computer and computer related equipment or the threshold for non-computer equipment.
2. Receives a purchase order, voucher, and invoice from the accounts payable department.

Tagging

- During tagging the PMO staff will verify the description, make, model, serial number, and location of the equipment. A CUNY barcode tag number is then placed on the item and the pertinent information is recorded on an input sheet and entered into the “INSITE” tracking system.
- That information becomes a permanent record in “INSITE” and must be inventoried annually.

NPT – Not Physically Taggable Equipment

- Equipment that is unable to be tagged for one reason or another.
- A CUNY barcode tag is placed on an input sheet and the information is entered into the “INSITE” database to capture the cost.
- If the NPT item resides inside a piece of tagged equipment, the tag number that the NPT is housed in will be reflected in the database for identification and location purposes.
- All NPT equipment is inventoried annually.

Buying Department and User Department

- Buying department is the one that pays for the equipment.
- User department is the one who is using the equipment.
- One department can be both the buyer and the user.

Annual Inventory

PROPERTY MANAGEMENT

Policy on Inventory of Equipment/Software

Annual Inventory:

The Property Management Office (PMO) conducts an annual physical inventory of the College's equipment and software purchased by the College with a threshold of \$1,000 for computer and computer-related equipment and a \$5,000 threshold for software and non-computer related equipment.

Department Heads are responsible for assuring that equipment/software purchased and allocated to their respective department can be accounted for during the annual inventory. All equipment that was not located during the initial scanning of the building must be verified for make, model, serial number, CUNY barcode tag number, and location.

Annual Inventory

The PMO distributes an annual report listing the not-found equipment/software for each area and forwards it to the appropriate Department Head. Department Heads are ultimately responsible and accountable for all not-found equipment on and off campus, therefore, it is the Department Heads responsibility to review their report of not-found equipment, account for the disposition and location of each not-found item, sign the report, and return the report to the PMO by the designated date.

Heads of Department(s) who authorize equipment to be used at home or off campus for faculty, staff or student members of the Graduate Center, must verify the equipment's location during the annual inventory. All equipment including those for home use and off campus must be returned to the Graduate Center prior to being separated from service. It is the Graduate Center's practice to withhold separating employee' check(s) who have not returned equipment prior to his/her last day of service.

Moving Equipment

PROPERTY MANAGEMENT / INFORMATION TECHNOLOGY
Procedure for Moving Graduate Center Equipment

To Have Equipment Moved

Department Heads who require Graduate Center equipment to be moved from one location to another within the Graduate Center must contact the Help Desk either at helpdesk@gc.cuny.edu or ext. 7300.

When moving equipment from one location to another an IT technician must complete a Move or Disposition Change Form.

[S:\PRP_MGT_files\All Property Management\Forms\Equipment Move Form Updated 7 15 2010.doc](#)



The Graduate Center
 The City University of New York
 365 Fifth Avenue
 New York, NY 10016

Work Order # _____
 For IT Use Only

Equipment Move or Disposition Change Form

This form should be used whenever a piece of equipment is moved from one location to another.
 Please forward to Nancy Saieh, Property Management, Room 8105.06

From :	Department Name	Department Head Name	Room #	Telephone #		
To :	Department Name	Department Head Name	Room #	Telephone #		
EQUIPMENT INFORMATION						
Description	GRA Tag #	Manufacturer	Model	Serial #	From Rm #	To Rm #
DISPOSITION DETAILS						
Please check the appropriate boxes						
Salvaged	Cannibalized	Moved	At Home Use	Off Campus Use	Returned	Is equipment in working condition? Y N
REQUIRED SIGNATURES						
_____		_____		_____		
"FROM" Department. Authorization		Information Technology		Property Management		
_____		_____		_____		
Date		Date		Date		

White Copy Property Management
Yellow Copy Information Technology
Pink Copy User Department

Salvage

To Salvage Outdated/Obsolete Graduate Center Equipment

Department Heads who require equipment to be salvaged should contact the Property Management Office at propertymanagement@gc.cuny.edu. IT and the PMO will arrange to have the outdated/obsolete equipment salvaged and removed from the premises. The PMO will then update the Graduate Center's "INSITE" tracking system database to reflect the change in the disposition of the equipment.

According to today's regulatory standards, the salvaging vendor will remove sensitive data off hard drives safely and securely.

Procedure for Returning Graduate Center Equipment

PROPERTY MANAGEMENT/INFORMATION TECHNOLOGY Procedure for Returning Graduate Center Equipment

To return Graduate Center equipment, please follow the procedure below:

1. Return equipment to the Department Head.
2. The Department Head or his/her designee will contact the Help Desk either at helpdesk@gc.cuny.edu or ext. 7300 to request to have the equipment picked-up; an IT staff member will open and close a work order stating that the equipment has been returned.
3. IT will send relevant information to the Property Management Office (PMO) stating that the equipment has been returned along with its current location.
4. The PMO will update the Graduate Center's "INSITE" tracking system database to reflect any changes pertaining to the equipment being returned.

Policy and Procedure for Loss or Stolen Property

According to internal control guidelines issued by the State Comptroller, all Senior Colleges must report the theft or loss of state-funded property with a value in excess of \$1000.00. The Graduate Center's policy and procedure on loss and stolen property is listed below:

Graduate Center's Policy and Procedure on Loss and Stolen Equipment

All equipment resulting from theft (stolen) or that has been destroyed resulting from damage from fire, flood, or vandalism (loss), should be reported to the Office of Security and Public Safety immediately. An incident report should be filled out and copy of that report will be forwarded to the Property Management Office. The Property Management Office will then update the disposition field in the "INSITE" database to reflect the change in status of the equipment.

Property Removal Pass

- [S:\PRP_MGT_files\All Property Management\Forms\Property Removal Pass.pdf](S:\PRP_MGT_files\All_Property_Management\Forms\Property_Removal_Pass.pdf)



The Graduate Center
 The City University of New York
 365 Fifth Avenue
 New York, NY 10016

0048

Number

PROPERTY REMOVAL PASS

Property Removal Passes may be obtained by emailing a request to propertymanagement@gc.cuny.edu. Request must include CUNY Tag#, Manufacturer, Model, Serial# for all items to be removed from the building. All boxes will be opened for inspection. Mailroom staff will re-seal boxes if necessary. Only passes with authorized signatures will be accepted.

Department	Extension	Bearer (Please Print)			Date
Description	CUNY Tag#	Manufacturer	Model	Serial#	
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					

VOID

Destination

_____ *Authorized Signature	_____ Property Management Signature	_____ Mailing Center Signature (Unsealed Boxes)	_____ Security Signature
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White Copy Property Management
 Canary Copy Bearer
 Pink Copy Security
 Goldenrod Copy Information Resources

PROPERTY MANAGEMENT

Procedure for Property Removal Pass

- To remove Graduate Center equipment from the building a Property Removal Pass is required. Please follow the procedure below:
 1. The Department Head or his/her designee sends an email or memo to propertymanagement@gc.cuny.edu notifying the Property Management Office (PMO) that Graduate Center equipment will be taken off campus. The email or memo should include the following:
 - a) Description of the equipment (Example: Computer, Printer).
 - b) Manufacturer (Example: Dell, Apple).
 - c) Model Number (Example: Model: Optiplex 755). Model numbers are located in different places on equipment; however, you can locate the model number by finding the designation “Model” before the number.
 - d) Serial Number (Example: S/N: 223476, Service Tag). A serial number is usually located on the back or bottom of equipment. However, different manufactures place them elsewhere. Therefore, you can identify the serial number by looking for the designation “S/N” or the word “serial” or “service tag” before a number.

- e. CUNY barcode tag number. This is a white sticker that is placed on equipment by the PMO. On the top of the sticker it has CUNY written in black letters and underneath that are the barcodes. Below the barcodes is a number that starts with “GRA” for Graduate Center, followed by numbers. (Example: Gra-0026098).



2. The Heads of Department or his/her designee must visit the PMO, Room 8105.06, to sign the Property Removal Pass. (**Important Note:** Only the Heads of Departments, Academic Offices, and Heads of Centers and Institutes are authorized to approve equipment being taken off campus and are ultimately responsible and accountable for that equipment). Off campus and at home equipment must be verified during the annual inventory and upon return to the Graduate Center it must be in working condition.

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3. A PMO staff member will then sign the Property Removal Pass and remove the top copy of the pass. The remaining copies will be given to the Department Head. The Department Head will retain a copy for his/her records and give the remaining copies to the person authorized to remove the equipment.

4. Security will open, inspect, and verify the contents of all unsealed boxes and packages. If a package must be sealed, the package along with the signed property removal pass must be taken to the Mailroom. The contents will be verified, the package will be sealed, and the property removal pass will be signed by Mailroom personnel.
5. When the bearer exits the building, Security signs the Property Removal Pass and returns the remaining copies to Property Management.

FOR IT STAFF ONLY:

Complete a Property Removal Pass form when sending equipment out for repairs.

IT/PMO Collaboration Committee

I would like to thank Sheldon Grant, Renee Marrero, Elaine Montilla, and Tawana Spellens who were instrumental in refining the equipment policies and procedures. Also, Heydi Hernandez who suggested changes to the Move and Disposition Change Form.