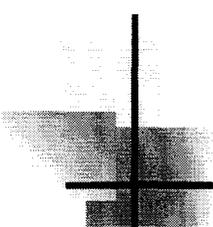


Asset Management at JPL

Presented to NPMA
Saddleback Chapter
May 21, 2002

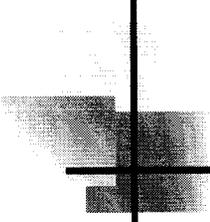
Cary Fox, Manager
Logistics Information Technology and Services



Asset Management at JPL

BACKGROUND

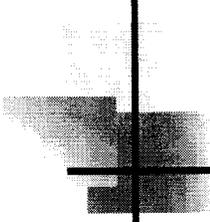
- Began *NBS* Project in 1995
- Selected Oracle As Database of Choice
- Down Selected to *Peoplesoft, SAP, & Oracle*
- After Demonstrations and Benchmarking,
 - Selected *Oracle Applications*
 - With Oracle Fixed Assets
- Implement *NBS* in October 1998



Asset Management at JPL

PROPERTY REQUIREMENTS

- **Integrate With Procurement and Finance**
- **Eliminate Labor-Intensive Signature Cards**
- **Involve Custodians in Process**
- **Improve Inventory Process**
- **Improve Valuation Process**
- **Retain Property Administration Functionality**



Asset Management at JPL

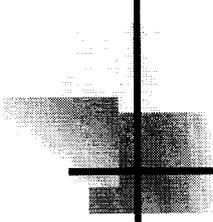
Oracle Financials with Assets

- **Add Asset from Receiving (Custom)**
- **Valuation from Accounts Payable (Vanilla+)**
- **Inventory Scans and Uploads (Custom)**
- **Retirement Feature for Disposals (Vanilla)**
- **Extensive User Defined Fields (Vanilla)**

Asset Management at JPL

Oracle Financials with Assets (cont.)

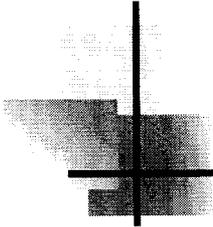
- **Email Alerts (Vanilla)
for Receipts, Transfers, and Rejections**
- **History for Assignments and Value (Vanilla)**
- **Manual Adds from Asset Workbench (Vanilla)**
- **Web Based With Release 11i (Vanilla)**



Asset Management at JPL

Web Features (Custom)

- **Acceptance of Responsibility**
Section Contacts
- **Reassignment / Relocation**
Transportation Request
- **On-Line Inventory**
- **Declare As Excess**
- **Query and Reutilization**
- **Available to ALL Web Users at JPL**



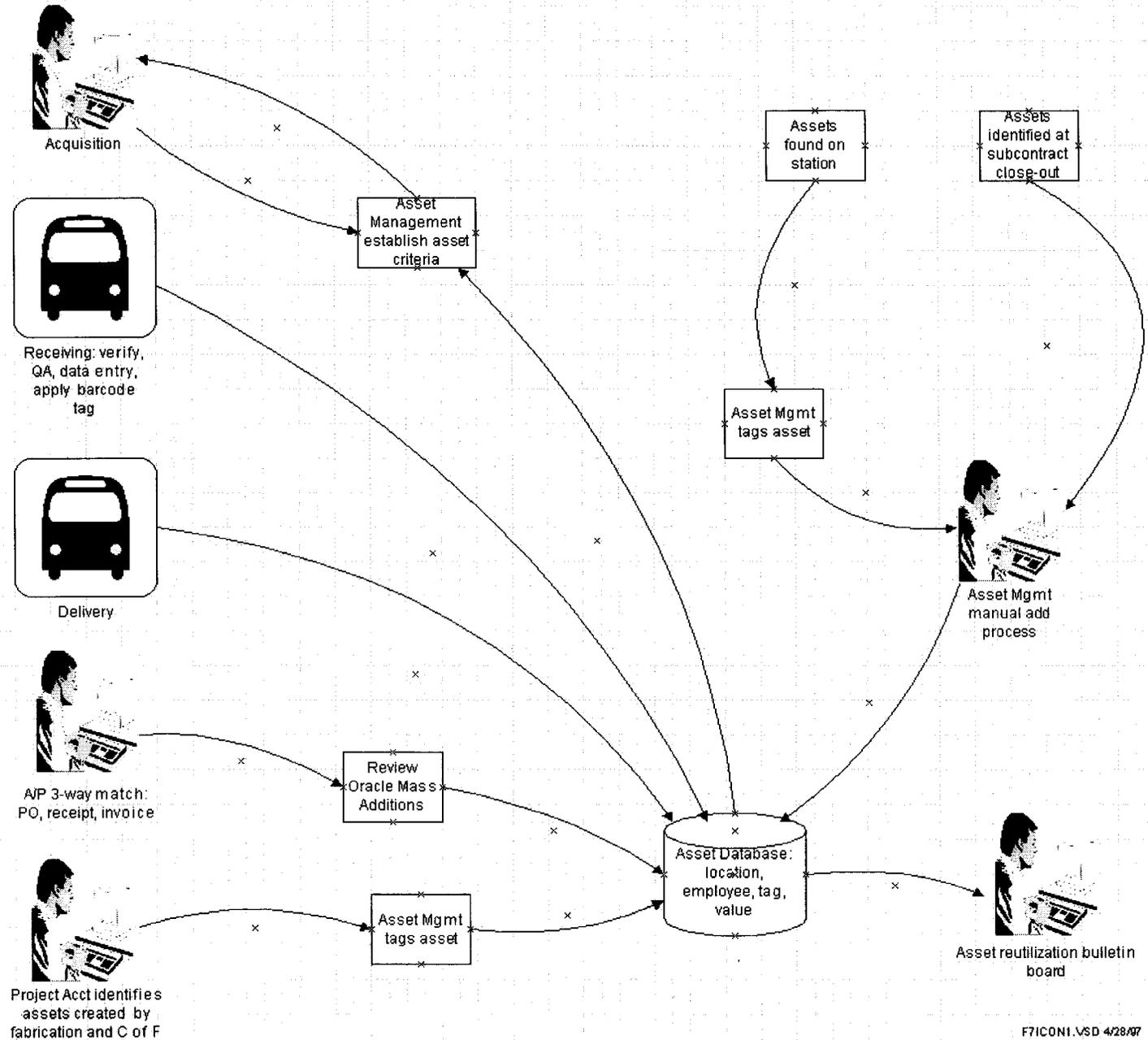
Asset Management at JPL

Lessons Learned

- **Full Involvement of Functional Areas**
- **Active Change Control (CCB) Process**
- **Minimize changes to Core (vanilla) Code**
- **Interface Design and testing is Critical**
- **Include all Essential Requirements**
- **User Query and Reporting is Essential**
- **Initial and Ongoing Training**

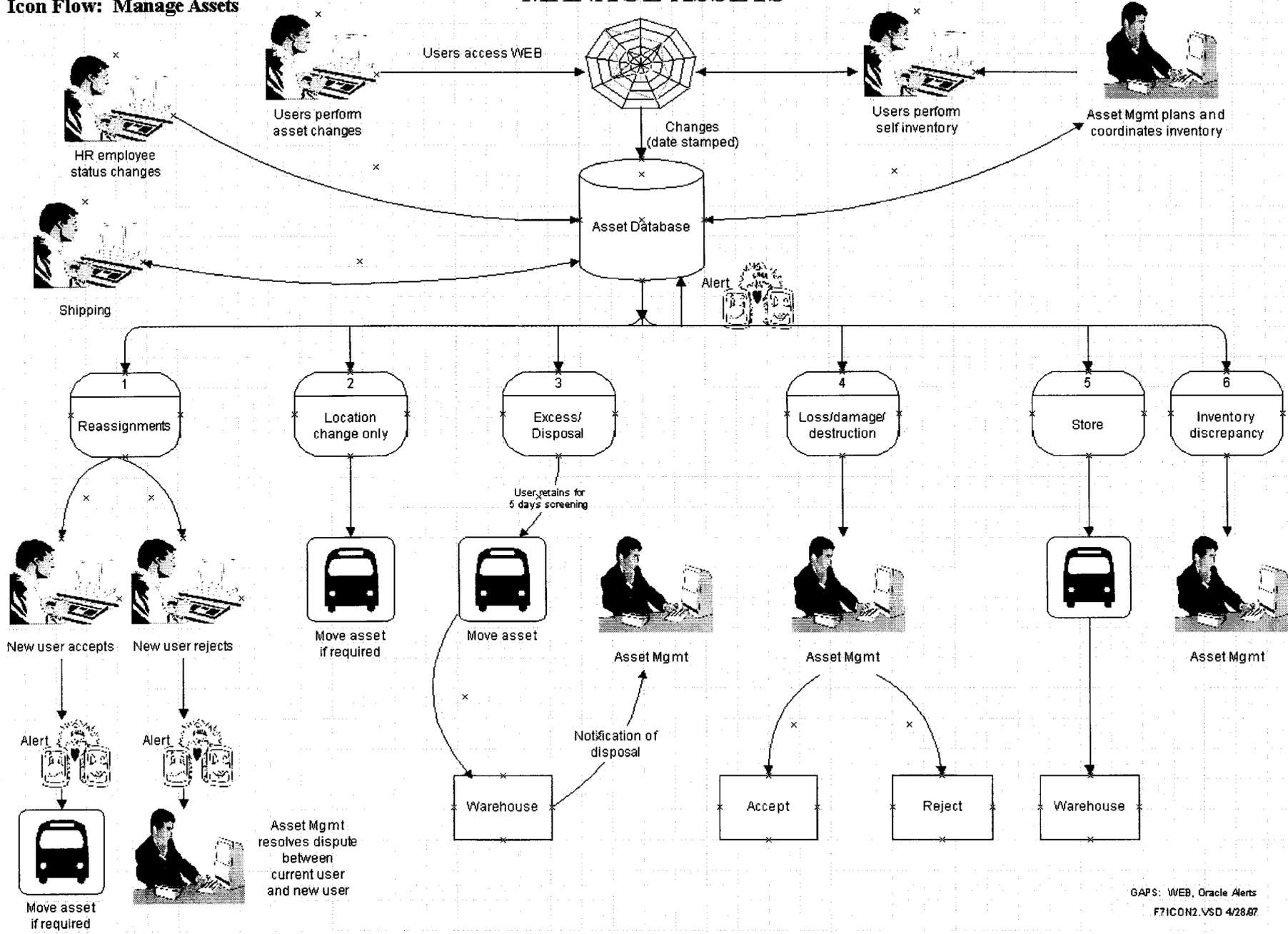
NBS: Finance: Asset Management
Icon Flow: Identify Assets

IDENTIFY ASSETS



NBS: Finance: Asset Management
Icon Flow: Manage Assets

MANAGE ASSETS



GAPS: WEB, Oracle Alerts
 F71CON2.VSD 4/28/07

Assets Main Menu

For assistance with this Application, contact your Property Administrator. For a list of these individuals, use this link: [Property Administrators](#)

Name: FOX, CARY A

Role(s): Employee Contact FOX, CARY A

Show items requiring inventory.

Assigned Items

To perform a transaction, first mark the asset's check box, and click on your selection.

	Tag	Description	Location	Last Inv. Date	
<input checked="" type="checkbox"/>	1305290	COMPUTER-PRINTER	111.146.JPL	13-FEB-2001	Detail
<input checked="" type="checkbox"/>	1315409	COMPUTER-MODEM	111.116C.JPL	20-APR-2001	Detail
<input checked="" type="checkbox"/>	1485130	COMPUTER-MONITOR-COLOR	601.157F.JPL	15-MAR-2001	Detail
<input checked="" type="checkbox"/>	1485289	COMPUTER, MICRO	111.116C.JPL	18-APR-2001	Detail
<input checked="" type="checkbox"/>	1487116	COMPUTER-PRINTER-LASER	111.22.JPL	22-JUN-2001	Detail
<input checked="" type="checkbox"/>	1487826	COMPUTER, MICRO	111.116C.JPL	18-APR-2001	Detail
<input checked="" type="checkbox"/>	1470106	CMPTR-DISC DRIVE-ZIP (IN CLOSET)	NONE.NONE.OSL	28-FEB-2001	Detail
<input type="checkbox"/>	1472704	COMPUTER-MICRO-LAPTOP	NONE.NONE.OST	18-JAN-2002	Detail
<input type="checkbox"/>	1688818	NOKIA 8290 CELLULAR PHONE	NONE.NONE.OST	30-APR-2002	Detail

Legend: P = Pending Transaction
 I = Property Accountability Resolving
 Yellow = Requires Inventory



Reassign / Relocate

PRINT AND ATTACH FORM! IF TRANSPORTATION IS REQUIRED, PLEASE BE SURE TO PRINT AND SECURELY ATTACH THE TRANSPORTATION FORM TO EACH ITEM.

Name: FOX, CARY A

Items Selected for Reassignment

Tag	Description	From Location	To Person	To Location	Transp. Req'd	Over 50 lbs	
<input checked="" type="checkbox"/>	1305290 COMPUTER-PRINTER	111.145.JPL	WEN, TONY Y	111.145.JPL	No	No	Detail
<input checked="" type="checkbox"/>	1315409 COMPUTER-MODEM	111.116C.JPL	<input checked="" type="checkbox"/> WEN, TONY Y	<input type="checkbox"/> 111.116C.JPL	No	No	Detail
<input checked="" type="checkbox"/>	1465130 COMPUTER-MONITOR-COLOR	601.157F.JPL	<input checked="" type="checkbox"/> WEN, TONY Y	<input type="checkbox"/> 601.157F.JPL	No	No	Detail
<input checked="" type="checkbox"/>	1465299 COMPUTER, MICRO	111.116C.JPL	<input checked="" type="checkbox"/> WEN, TONY Y	<input type="checkbox"/> 111.116C.JPL	No	No	Detail
<input checked="" type="checkbox"/>	1467116 COMPUTER-PRINTER-LASER	111.22.JPL	<input checked="" type="checkbox"/> WEN, TONY Y	<input type="checkbox"/> 111.22.JPL	No	No	Detail
<input checked="" type="checkbox"/>	1467826 COMPUTER, MICRO	111.116C.JPL	<input checked="" type="checkbox"/> WEN, TONY Y	<input type="checkbox"/> 111.116C.JPL	No	No	Detail
<input checked="" type="checkbox"/>	1470106 CMPTR-DISC DRIVE-ZIP (IN CLOSET)	NONE.NONE.OSL	<input checked="" type="checkbox"/> WEN, TONY Y	<input type="checkbox"/> NONE.NONE.OSL	No	No	Detail

Transportation Pickup Form Cancel/Back Submit

Use the checkboxes next to the "To Person" and "To Location" fields to copy the value from the previous row.

Reassignment Instructions:

1. To select a new assignee (see note below), use the drop-down list of values to perform a query.
2. Type the name, hit enter, and click on your selection.
3. To select a new location, perform like steps 1 & 2.
4. If Transportation is not required, click on the Submit button to complete the transaction.
5. If Transportation is required, select "Yes" option and see steps 6-10.
6. If Over 50 lbs., select "Yes" option.
7. Click on the Transportation Pickup Form button to review and add comments.
8. To print, select file & print from the menu.
9. Securely attach the form to the item.
10. Click on the Submit button to complete the transaction.

Note: To reassign a PC/Mac for charging purposes, please contact your Unified Charging System (UCS) representative. For a list of these reps, use this link: [UCS Reps](#)

Assets Main Menu

For assistance with this Application, contact your Property Administrator. For a list of these individuals, use this link: [Property Administrators](#)

Name: FOX, CARY A

Role(s): Employee Contact FOX, CARY A

Show items requiring inventory.

Outbound Transfers

Tag	Description	To Location	To Person
1305290	COMPUTER-PRINTER	111.145 JPL	WEN, TONY Y
1315409	COMPUTER-MODEM	111.116C JPL	WEN, TONY Y
1465130	COMPUTER-MONITOR-COLOR	601.157F JPL	WEN, TONY Y
1465289	COMPUTER, MICRO	111.116C JPL	WEN, TONY Y
1467116	COMPUTER-PRINTER-LASER	111.22 JPL	WEN, TONY Y
1467828	COMPUTER, MICRO	111.116C JPL	WEN, TONY Y
1470106	CMPT-R-DISC DRIVE-ZIP (IN CLOSET)	NONE NONE OSL	WEN, TONY Y

Tag	Description	To Location	To Person
1305290	COMPUTER-PRINTER	111.145 JPL	WEN, TONY Y
1315409	COMPUTER-MODEM	111.116C JPL	WEN, TONY Y
1465130	COMPUTER-MONITOR-COLOR	601.157F JPL	WEN, TONY Y
1465289	COMPUTER, MICRO	111.116C JPL	WEN, TONY Y
1467116	COMPUTER-PRINTER-LASER	111.22 JPL	WEN, TONY Y
1467828	COMPUTER, MICRO	111.116C JPL	WEN, TONY Y
1470106	CMPT-R-DISC DRIVE-ZIP (IN CLOSET)	NONE NONE OSL	WEN, TONY Y

Assigned Items

To perform a transaction, first mark the asset's check box, and click on your selection

Tag	Description	Location	Last Inv. Date
<input type="checkbox"/>	COMPUTER-PRINTER	111.145 JPL	13-FEB-2001
<input type="checkbox"/>	COMPUTER-MODEM	111.116C JPL	20-APR-2001
<input type="checkbox"/>	COMPUTER-MONITOR-COLOR	601.157F JPL	15-MAR-2001
<input type="checkbox"/>	COMPUTER, MICRO	111.116C JPL	18-APR-2001
<input type="checkbox"/>	COMPUTER-PRINTER-LASER	111.22 JPL	22-JUN-2001
<input type="checkbox"/>	COMPUTER, MICRO	111.116C JPL	18-APR-2001
<input type="checkbox"/>	COMPT-R-DISC DRIVE-ZIP (IN CLOSET)	NONE NONE OSL	28-FEB-2001
<input type="checkbox"/>	COMPUTER, MICRO	111.116C JPL	18-APR-2001
<input type="checkbox"/>	COMPUTER-MICRO-LAPTOP	NONE NONE OSL	18-JAN-2002



Assets Main Menu

For assistance with this Application, contact your Property Administrator. For a list of these individuals, use this link: [Property Administrators](#)

Name: WEN, TONY Y

Role(s): Employee Contact

Show items requiring inventory.

Inbound Transfers

Tag	Description	To Location	From Person	Accept	Reject
1305290	COMPUTER-PRINTER	111.146.JPL	FOX, CARY A	Accept	Reject
1315409	COMPUTER-MODEM	111.116C.JPL	FOX, CARY A	Accept	Reject
1465130	COMPUTER-MONITOR-COLOR	601.157F.JPL	FOX, CARY A	Accept	Reject
1465289	COMPUTER, MICRO	111.116C.JPL	FOX, CARY A	Accept	Reject
1467116	COMPUTER-PRINTER-LASER	111.22.JPL	FOX, CARY A	Accept	Reject
1467826	COMPUTER, MICRO	111.116C.JPL	FOX, CARY A	Accept	Reject
1470106	CMPTR-DISC DRIVE-ZIP (IN CLOSET)	NONE.NONE.OSL	FOX, CARY A	Accept	Reject

You currently have no assets assigned to you.

[View Excess](#)

[Assets Query](#)





Inventory

Name: FOX, CARY A

Employees are required to physically verify each asset when performing their "Web" inventory.*

Assigned Items Selected for Inventory

	Tag	Description	Location	Last Inv. Date	Inv. Type	
<input checked="" type="checkbox"/>	1705140	COMPUTER SYSTEM	601.157F.JPL	15-MAR-2001	SCN	Detail
<input checked="" type="checkbox"/>	1705141	COMPUTER SYSTEM	111.119.JPL	22-JAN-2001	WEB	Detail

[Cancel/Back](#) [Submit](#)

*All transactions submitted herein are subject to audit by Property Accountability and Governmental Agencies



██████████ Declare as Excess

PRINT AND ATTACH FORM!

PLEASE BE SURE TO PRINT AND SECURELY ATTACH THE EXCESS FORM TO EACH ITEM.

Name: FOX, CARY A

Assigned Items to be Declared as Excess

	Tag	Description	Location	Condition Code	Over 50 lbs		
<input checked="" type="checkbox"/>	2083383	SERVER, FILE	111.118C.JPL	(1) New or Unused - Good	No	Excess Reason	Detail

Excess Notes:

1. For DNS items, please contact your Unified Charging System (UCS) Representative to discontinue charging. For a list of these representatives: [UCS Reps.](#)
2. For items containing hazardous materials (e.g., chemicals, oils, etc.), please contact Environmental Affairs at x4-0635 for prior authorization.
3. Properly prepare the item(s) for pickup by disconnecting all cables, attaching the excess form so as to not obscure the tag, and place in a clearly visible spot within a secure location--not in a hallway!

Excess Instructions:

1. To select a new location, use the List of Values to perform a query.
 - Type the location, hit enter, and click on your selection.
2. Select Condition Code from drop-down list of values.
3. If Over 50 lbs., select "Yes" option.
4. Click on the Excess Reason button and select a reason.
5. Click on the Excess Form button to review and add comments.
6. To print, select File > Print from the menu.
 - For multiple items, select the Next button for remaining forms.
7. Securely attach the form to the item.
8. Click on the Submit button to complete the transaction.



Assets Query

To Narrow Your Search, Complete The Following Parameter Fields:

Query Parameters

Employee: <input type="text" value="Number"/>	Tag Number: <input type="text"/>
Description: <input type="text"/>	Location: <input type="text"/>
Manufacturer: <input type="text"/>	Model Number: <input type="text"/>
Other: <input type="text"/>	Organization: <input type="text"/>

Inventory Parameters

Selection:

Inventory by Organization Report

Organization Number:

Search Tips:

- Employee Name** - Enter the employees name in the following format: [LastName, FirstName MI] (ex. Doe, John X).
 - Location** - Enter the location in the following format: [Bldg.Room.JPL] (ex. 601.155Z.JPL)
 - Organization** - Enter the 4 digit number of the org (ex. [2200]).
 - Project/Task** - Enter the project and task numbers in the following format: [Project#/Task#] (ex. 1111/1.2.3)
- For questions or comments about this page, please contact the [WebMaster](#)