

Annual Inventory Certification Instructions - Fiscal Year 2024

Agencies: Texas A&M AgriLife Research, Texas A&M AgriLife Extension and
Texas A&M Veterinary Medical Diagnostic Laboratory

Dates: **January 29 – April 19, 2024** (must file extension if not completed by date)

AssetWorks: <https://sv.assetworks.com/sv/f?p=1001:101>

BASIC PROCESS – DEPARTMENTS & OFF-CAMPUS CENTERS (County Offices – See Separate Instructions on Last Page)	
1	Place scanner in charging base, connect base to power and charge scanner . Allow to charge before scanning. Power on and connect inventory scanner to Wi-Fi. (Additional information is provided in detail section below.)
2	Connect scanner to Wi-Fi. If you skip this step, you cannot login. (See detailed instructions on Page 2.) Login to inventory scanner , department inventory will load to scanner. <ul style="list-style-type: none"> • Username: UIN • Password: AgriLife2024! • Customer: agrilife • The first time you login, you will be asked if you want to erase prior data and sync with new data – answer YES to sync to the new year inventory. • Select Inventory from the menu choices • When the screen has a field for Asset Number, you are ready to begin scanning
3	Login to AssetWorks online at https://sv.assetworks.com/sv/f?p=1001:101
4	Begin scanning inventory items by pressing yellow button on barcode scanner and pointing the scanner ray at the barcode label on the asset. <ul style="list-style-type: none"> • If the item is found on inventory, review and update the following data for each asset: <ul style="list-style-type: none"> ○ Building ○ Room/Floor ○ Other Location ○ User Group ○ Condition Code • If discrepancies are found in the description, manufacturer name/model, or serial number indicate the correction that needs to be made in the NOTES at the bottom – do not change these items in the fields. Example of items to enter in NOTES field: <ul style="list-style-type: none"> ○ Update Description (enter what Description should be) ○ Update Serial Number (enter what Serial Number should be) ○ Asset is Missing ○ Asset Surplused (include Reference Number and Date if possible) ○ Transferred (include Reference Number and Date if possible) ○ Sold (include Reference Number and Date if possible) ○ Verified by picture/email ○ Verified with AG-311 ○ Need Barcode Label • After edits are made, or if everything is correct on the asset, click CONFIRM to save the asset as completed and scan the next item. • If the display shows the item was not found, do <u>not</u> add the item to inventory. This item is either a new purchase, on the inventory of another unit, or possibly an item that is no longer on inventory and will need to be handled separately. • If items are away from the assigned location, they must be brought to the department for physical inventory or verified by photos showing the asset, barcode label and serial number. If verified by photo,


	<p>store photos with inventory backup to submit with Certification of Physical Inventory. In Notes field, enter “verified by photos.”</p> <ul style="list-style-type: none"> Assets can also be manually updated online in AssetWorks, but it is preferable to use the scanner for inventory verification.
5	Sync barcode scanner to AssetWorks online to update percent complete (inventory will auto update via Wi-Fi, unless you are out of reach or outdoors, and then sync will happen when you are in Wi-Fi range).
6	Complete asset away forms (AG-311) for any mobile or portable items, including cameras, laptops, projectors, vehicles, etc. and store in Laserfiche 5.02.09.02.1 under your department folder.
7	Complete property transfers to surplus for all surplus equipment and handle according to surplus procedures.
8	<p>If any inventory is missing, mark appropriately in AssetWorks and complete necessary paperwork.</p> <ul style="list-style-type: none"> Select CHANGE Update fields as follows: <ul style="list-style-type: none"> Building: 00003 Room: MISS Other Location: MISSING AG308-FY (FY = current fiscal year) Complete AG-308 and submit with Inventory Certification
9	When AssetWorks online shows 100% completion , submit Certification of Physical Inventory AG-320 (with printout of inventory attached) in Laserfiche WIP-Inventory. Keep photos of items that were not physically brought to office with inventory records.
10	Logoff of inventory scanner. Go to Wi-Fi settings and forget your Agnet credentials so that next user can login.

Steps for Connecting AgriLife Owned Inventory Scanner to Wi-Fi

- Swipe up from the bottom of the screen to see all the apps.
- Scroll down to the Settings app, which has a green background and a white gear as the picture, click on it to open it
- Click on Network & Internet
- Select the Wi-Fi network you want to use by clicking on it. If you are in College Station, please use the **TAMU_WiFi** network. For **Off-Campus centers**, Auto Connect should work to connect to the Wi-Fi in your building with no issue, but if it does not work, please use the manual configuration settings below.
- Please make the following configuration for your Wi-Fi network:
 - **EAP Method** – select PEAP
 - **Phase 2 authentication** – select MSCHAPV2
 - **CA certificate** – select Do not validate
 - **Identity** – This is your NetID (if you are not in College Station, this would be your AgNet Credentials [FIRST.LAST])
 - **Anonymous Identity** – Leave Blank
 - **Password** – This is your NetID password (if you are not in College Station, this would be your AgNet password)
 - Click on **Advanced Options** and then scroll up
 - **Proxy** – select None
 - **IP Settings** – select DHCP

If you have any issues connecting your scanner to the Wi-Fi in your building, please contact FirstCall, your Regional IT Specialist, or Shawn Whitley (979-314-0951 | shawn.whitley@ag.tamu.edu).

Tips for Using Inventory Scanner (Departments/Centers Only)

1. The Scan & Validate app is loaded on the new scanner and is on the desktop. 
The icon for Scan & Validate is:
2. Click the icon once to launch the app.
3. Once it opens, you should see a screen that asks you to enter your **Username** (UIN) and **Password**.
4. On the next screen, which is the Menu, you should see 3 choices in gray boxes: **Inventory**, **Search Inventory**, **Settings**.
5. Select **Inventory** and this will take you to a screen to Search an AssetNumber. Press the yellow button on the scanner and point the beam at the barcode. If the item is found in the inventory, you will see the Inventory Detail on the screen and can scroll through the information.
6. Review all of the data fields shown in the table on Page 1 of these instructions. Make the needed corrections and click **CONFIRM** on the screen. If no corrections are needed, click **CONFIRM** on the screen. If you made changes the item will save as "CHANGE." If you did not make changes, the item will save as "CORRECT."
7. While connected to Wi-Fi, the scanner will sync every 60 seconds. If you are out of range of Wi-Fi (i.e. parking lot), the changes will update once you rejoin Wi-Fi connection.
8. If you select **Search Inventory** on the Menu screen and leave the status as All, and then hit search in the top right-hand corner of the screen under the clock, you can view all your assets by scrolling through them.

Tips for Updating Assets on New Scan & Validate Website

1. You can manually update your assets manually by using the Scan & Validate website
<https://sv.assetworks.com/sv/f?p=1001:101>
2. Log on to the Scan & Validate website with your Username, Password and Customer from Page 1.
3. Click on your **department code** on the Inventory by Subset page, which will be the main page you see when you log into the website, to view all your assets for that department code.
4. Once you see all the assets for your department code, you can account for each asset by clicking on the **Pencil icon** under the **View/Edit column**, or by clicking on the **Asset Number**, and see all the information fields for that certain asset.
5. Review the items listed on Page 1 under Item 2 for accuracy and update as needed.
When updating the Condition Code, do NOT use the "N1-N4 Codes." Please click the link below for a full list of codes:
<https://agnettamu0.sharepoint.com/sites/AdminServices/Shared%20Documents/Asset%20Management/Inventory/property-control-codes.pdf?web=1>
6. If no corrections are needed, select "Correct" in the "Status" dropdown menu at the top and click "Save" at the bottom of the screen.
7. If changes are needed, select "Change" in the "Status" dropdown menu at the top, make the corrections, and click "Save" at the bottom of the screen. See Page 1 of instructions for more information.
8. **Notes Section:** Enter the following information as needed in the Notes section for each asset:
 - Update Description (enter what Description should be)
 - Update Serial Number (enter what Serial Number should be)
 - Asset is Missing

- Asset Surplused (include Reference Number and Date if possible)
- Transferred (include Reference Number and Date if possible)
- Sold (include Reference Number and Date if possible)
- Verified by picture/email
- Verified with AG-311
- Need Barcode Label

The following information is **NOT NECESSARY** to be entered in the NOTES section:

- Corrected (Updated) Building Number
- Corrected (Updated) Room Number
- Corrected (Updated) User Group
- Corrected (Updated) Other Location
- Corrected (Updated) UIN

9. **Missing Items:** If an item is not found, mark the asset as missing. Select “Change” in the Status dropdown and make these edits, then “Save” at the bottom of the screen.

Bldg: 00003

Room: MISS

Other Location: MISSING AG308-FY (Current)

Notes: Item Reported Missing (Current FY) Certification; AG-308 submitted

*Each Department/District/County will need to submit an AG-308 Missing or Stolen Property Report for any Missing asset(s). The asset(s) will be marked with a MS (Missing Request) code for 2 years, and if they are not found at the end of the 2 years, the asset(s) will be deleted from the Department’s inventory and the AG-308 form will be used as the Deletion form (in place of the AG-302).

10. **Verification by Photos:** Photos and emails for items verified by photos do not need to be submitted with the AG-320 form, but units should keep this documentation in their office in the event of a post-inventory audit in accordance with the TAMUS Records Retention Schedule for inventory records.

Documentation should include:

- a. Picture of item showing the asset and its tag number.
- b. If a vehicle, license plate number.
- c. Email from end-user confirming they have the asset
- d. Completion of AG-311 Property Used Away from Assigned Location Form.

11. **Assets Located Away from Assigned Location:** Each employee who uses assets away from the assigned location must annually complete the AG-311 form, to be **filed by the unit in Laserfiche 5.02.09.02.1**.

Examples of items to include on AG-311 are laptops, personal computer, tablets, cameras, projectors, vehicles. AG-311 forms should not be included with the inventory paperwork stored in WIP-Inventory.

12. As you complete each asset, your home screen shows the % completed progress. Continue this process until all assets have been changed from No Scan to either **Correct** or **Change** and your inventory is 100% complete.

Requesting Extension to Complete Inventory Certification

If a Department/District/County is not able to complete their inventory certification by April 14, 2024, an AG-327 Request for Extension of Time for Annual Inventory Certification form should be submitted to Shawn Whitley. Form link: <https://agnettamou0.sharepoint.com/sites/AdminServices/Forms/ag-327.pdf?web=1>

The AG-327 form will need to be filled out completely, signed and submitted to the Property & Fleet Management Office for review. **No Extensions will be granted after Wednesday, May 15th.**

Submitting Completed Certification to Property & Fleet Management Office

After all assets are scanned and inventory is 100%, complete the AG-320 Annual Certification of Physical Inventory of Property Form. <https://agnettam0.sharepoint.com/sites/AdminServices/Forms/ag-320.pdf?web=1>

- The only assets that are to be listed on the AG-320 form are ones that are missing, stolen, surplus, sold and transferred. Please use additional copies of the AG-320 form to list your assets as needed.
- Submit the signed AG-320 to the Texas A&M AgriLife Property and Fleet Management Office by scanning to WIP-Inventory / respective agency folder in Laserfiche.
- The Property and Fleet Management Office will run an Error Report when the inventory is downloaded back into FAMIS, and departments/districts/counties will be contacted for clarification of issues as needed.
- Extension District Offices will complete a separate AG-320 for the district office and each county office location in the district.
- Store AG-311 Property Used Away from Assigned Location forms in unit folders in Laserfiche (update annually)
- Submit missing items paperwork with inventory certification.
- Store photos and other inventory backup locally in department inventory file, destroy in accordance with TAMUS Records Retention Schedule.

Please contact the Texas A&M AgriLife Property and Fleet Management Office with any questions or issues you may have regarding your Annual Inventory Certification:

Shawn Whitley – Inventory, Property, & Fleet Control Director

- 979-314-0951, shawn.whitley@ag.tamu.edu

Tracy Farris, Assistant Manager

- 979-314-0127, tracy.farris@ag.tamu.edu

BASIC PROCESS – COUNTY EXTENSION OFFICES

1	District Office received inventory instructions from Property Office.
2	<p>District Office - Login to AssetWorks online to download county inventories:</p> <ul style="list-style-type: none"> • Select REPORTS from left menu. • Select report name ALL ASSETS BY SUBSET. • Scroll to bottom of report and click DOWNLOAD. • Go to downloads folder and find Excel document. • Document will be sorted by subset, starting with the district office and then by county in numerical order of county code for inventory. • Hide columns that counties won't need to see (Columns B, C, M, N, P, R, S, T, U, W and X). • Add a Notes column in Column Y. • Add cell lines for the worksheet. • Hide the rows containing the district office inventory, then highlight the rows and columns for the first county; print selection to PDF; save PDF file as FY24 Inventory CoName. • Send separate emails to each county containing instructions and their inventory list. <ul style="list-style-type: none"> ○ Request that two people in county perform physical inventory, verify the asset number, serial number, description, condition code, user group, and location information. Ask them to make any notes for changes, or write correct in the Notes column. ○ Do not give counties the URL at this time; just ask them to complete the physical inventory by the date when you schedule a Teams training with them.
3	<p>Review downloaded spreadsheet for each county. Look for these potential problems:</p> <ul style="list-style-type: none"> • How many computers are on the inventory compared to the number of employees working in the office? If there are too many computers, some are probably not in use and need to be surplus. • How old are the assets? Are they possibly no longer in use and need to go to surplus? • Review age of assets – has the county been changing the condition code every 2 or 3 years? • Question counties with items that look odd, or if there is excess inventory. • You can do audits by offering to “help the county with their inventory” and go live to the county.
4	Schedule Teams meeting for county support staff to complete inventory during live training. They should complete their physical inventory with two people before the date of the Teams meeting.
5	<p>During Teams meeting, counties will login to AssetWorks and complete inventory during meeting:</p> <ul style="list-style-type: none"> • (District Office) Pick a county to demonstrate during training (maybe one with a vacancy or new support staff). *District Office logs in as county office to complete demonstration. • Counties login to AssetWorks: <ul style="list-style-type: none"> ○ Username: countyname (no spaces, i.e. sanpatricio) ○ Password: AgriLife2024! ○ Customer: agrilife • Give county support staff 15-20 minutes to complete inventory online, stay on for questions. • If a county has problems logging in, help troubleshoot and seek help from Shawn Whitley if needed. • Share your screen with the home screen in AssetWorks, verifying completion of the counties as they tell you they are done. If they are finished and your screen shows 100%, then they can leave the Teams meeting. • If they make changes, but it is not showing on AssetWorks, ensure they are clicking SAVE. • If items are verified by photos, county should send the email and pictures to district office.
6	After all county inventories and district inventory are 100% complete, proceed with instructions above for the AG-320, missing inventory and property used away from assigned location.