

Asset Management and Eprocurement

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Agenda

- 1.) Assets
- 2.) Leases
- 3.) Questions

Epro and AM

History

- UNSPSC/Category Codes
- Tag Numbers, Custodians, Locations
- Profile IDs and AM Business Units
- Pending Links
- Receiver Status = Moved
- Interfaces
- Asset Flags
- Receivers
- AM 5 Phase Clean Up
- Capital Account Codes
- Requisitioners
- Query:
SOIPO_Asset_Flagged_POs
- Buyers/Approvers

Epro and AM Plan

- August Weekly Distributions of partial list of SOIPO_Asset_Flagged_POs query results to Agencies
 - Partial List contains information from 07-01-2010 through Present
- Post and Track results of Sent Files
- Contact Agencies not showing progress

SOIPO Asset Flagged POs

Short Term Goals

- Understand how the query works, what is populating the results, how to distinguish the assets from non assets, and how to fix the non-assets
- Review the results
- Remove the AM BU and Profile ID from the non-asset items

- The goal is not to have zero query results. The goal is to have only the correct, taggable, future inventory items in the results.

SOIPO Asset Flagged POs

Long Term Goals

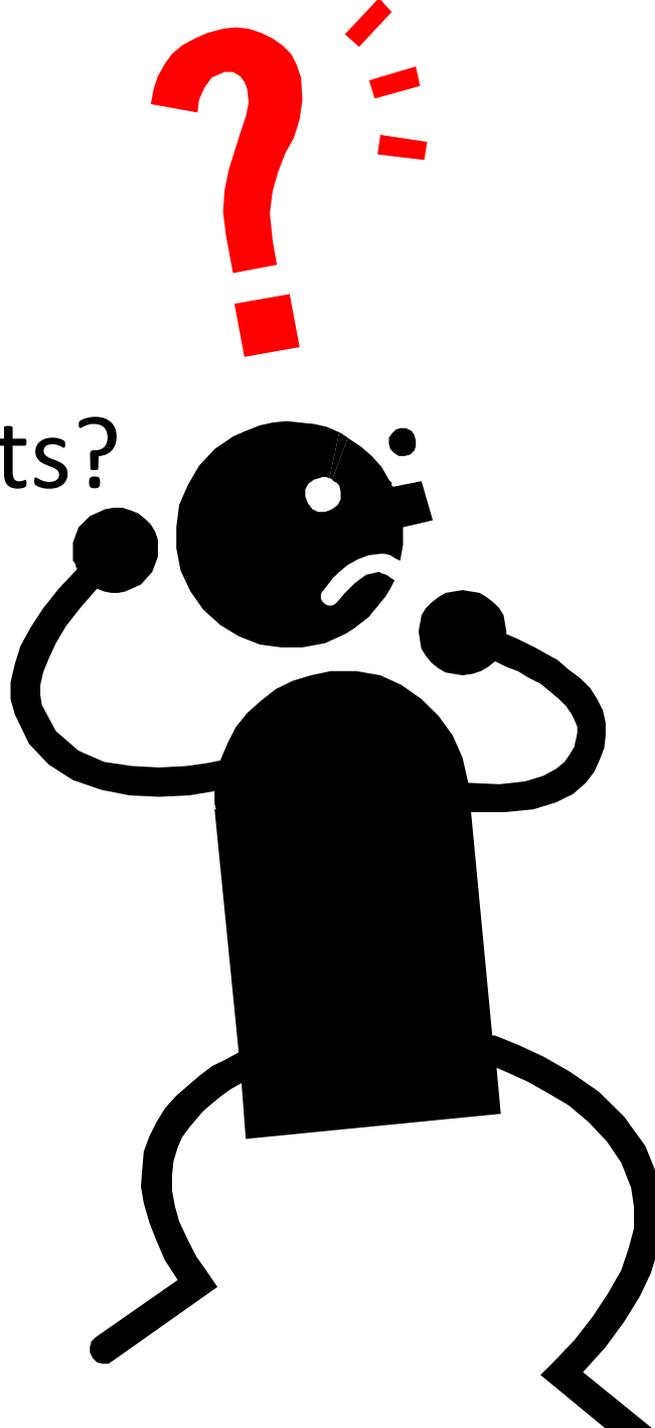
- Track the Buyer's ability to monitor the requisitions and POs for asset related info including profiles and account codes
- Have the agency establish procedures to regularly run SOIPO_Asset_Flagged_POs Query
- Encourage communication between ePro and AM Staff members

SOIPO Asset Flagged POs Explanation

This public query returns all POs lines that:

- Have a Profile ID
- Were created after 07-01-2009
- Do not have a header or line status of cancelled, completed, or closed
- Examples

Questions
about Assets?



Leases

- State of Indiana – Lease Accounting Packet
 - Beginning on July 1st, please route the packet Fred Van Dorp at AOS either through email (fvandorp@auditor.in.gov) or interdepartmental mail.
 - Additional information related to Lease POs can be found in the leasing section at: <http://www.in.gov/idoa/2342.htm> .



Training

- Questions
- Request for Quoted
- Procurement Contracts
- Purchase Orders
- Stage/Source Requests
- Acknowledgements
- Manage Change Orders
- Reconcile POs
- Review PO Information
- Reports
- idol.Instate Express
- POs
- idol.Update POs**
- Improve Amounts
- Release PO IDs
- Maintain Distributions
- Research POs
- Print Document
- Interface
- Budget Check
- Print Event Request
- Vendor Workflows

Maintain Purchase Order

Is this a Lease?

Unit: 00001 PO ID: 0010501776 Vendor: AANDMFARMC-001

Updated Answer

No Yes

OK Cancel Refresh

Is this a lease?

Leases, follow up

- Need packets for all POs marked as “Yes.”
- There should be no asset flags for Leased lines on POs
- Pay attention to the account codes used for Lease purchases
- Encompass Location is the “Ship to” location from the schedule tab of PO
- Include either full name (last, first, initial) and/or employee ID for the custodian

Leases, follow up

- Public query SOIPO_Leased_POs is still under construction.
 - The query will list all POs with “Lease = Yes.”
 - This is the list that we use to determine if we have received the correct number of packets from your agency.
 - Until the query is completed and made public, leased PO lists can be requested from fvandorp@auditor.in.gov

Questions
about Leases?

