**Commonly Asked Questions:**

1. **For those purchasing transactions impacted, what are the specific changes to the purchasing and receiving process?**

**Creating a Requisition**
- The Item Category must be a category for Major Equipment >$5,000. Each Item Category is assigned to a pre-defined account code. The Controller’s office policy is that the **Account number** cannot be changed once the Item Category is chosen.
- Enter comments in the **Additional Comments** field to describe assets that are being shared by a department or made up of multiple parts, such as fabricated equipment.
- Review the **Asset Information** tab to verify that this item is set up as an asset.

**Receiving**
- If the item is an asset, 2 columns will be shown, Serial and Asset Status.
  - Check the **Serial** checkbox when receiving multiple quantities of the same item at one time.
  - Click on the **Asset Status** Pending link to go to Asset Management Information page.
- Enter the **Serial ID (Serial Number)** on the Asset Information tab
- Enter the name of the Asset’s **Custodian** on the More Details tab.
- **Asset Location** is automatically defaulted from the **Ship To Location** on the requisition. This **Location** may be changed, if necessary.
- Enter other information such as **Model, Manufacturer, and VIN** (this information is optional)
- When you receive an item with multiple distribution lines (split funding), receive each distribution line separately, and click the **Use One Asset ID** button before you click OK.

2. **Why can’t I change/override account code when creating a requisition?**

Requisitions represent expenditures for the University and thus must reflect the use/nature of the transaction. Therefore, to ensure consistency with reporting financial results, edits to the account code will not be permitted when creating a requisition.

3. **If I have an account code that is not currently associated to an Item Category, how can I get it fixed?**

A listing of Item Categories and their associated account codes and descriptions are available at: [http://www.case.edu/projects/erp/asset/ITEM_CAT.pdf](http://www.case.edu/projects/erp/asset/ITEM_CAT.pdf) If an account code is not currently associated with any Item Category, please contact Rich Cowie (rlc31@case.edu).
4. What is Asset Location?

The asset location is a 10 character location code comprised of the building and room number and is different from the Mail Stop Location Code. The first four digits of the asset location code represent the building number. A list of building numbers is available on the Campus Planning & Facilities Management website at http://www.case.edu/finadmin/planop/Building%20List.pdf.

To update a Ship To location or asset location email cwrushipto@case.edu.

5. What’s the definition for an asset custodian?

An asset custodian is the person responsible for assisting the Equipment Accounting Office in the tagging and identifying of equipment, conducting physical inventories, reporting all equipment transactions including movement and disposals, and assisting in reconciling any unaccounted equipment.

6. How will my item be tagged (who and when)?

The Controller’s Office will be tagging most items on a periodic basis. Equipment located at the Hospitals or off campus shall be sent to the custodian.

7. How do we change a custodian after the item has been received and an asset has been created and tagged?

Please use the Equipment Inventory Update form and submit the form to equipment-contact@case.edu.

8. How do I change the asset location? If an asset is moved from one location to another.

Please use Equipment Inventory Update form and submit the form to equipment-contact@case.edu.

9. How do I retire an asset?

Please use form Equipment Retirement Form and submit the form to equipment-contact@case.edu.