SAMPLE
MyReports
Enhancement Concept Form

Enhancement Type:	☐ Enhancement to existing report	☒ New report
Report Name:	Asset Management Report	

Problem Statement: Provide a brief description of the problem or issue leading to the requested change.	UCOP and federal regulations require that departments perform a periodic physical inventory and verification of all capitalized assets. This report will serve as the basis for completing the required inventory process.
Proposed Solution: Provide a summary of the business requirements and the recommended solution. *Required:* Include report mockup or screenshot with sample of proposed enhancement.	Users should have the ability to run a standardized Asset Management Report to manage their equipment inventory and ensure that all capital assets are verified against the system of record. The Asset Management Report should list detailed information about capitalized assets to enable departments to perform their physical inventory. The report can also be used for basic inquiry, including the status of an asset. Users should have the ability to run the report by date and chartstring filters, as well as data filters which include PO number, custodian, asset tag ID or number, serial ID, asset status, asset location code, or manufacturer. The report should include the following data: chartstring, project ID, PO, asset tag ID, asset ID, description, serial number, model, profile ID, acquisition date, manufacturer, status, custodian, custody code, location, location description, and cost. Users should be able to sort by chartstring, PO, Asset Tag ID, Custodian, and Location. Hyperlinks should be included on the PO number so that users can drill down to the Purchase Order for additional detail if required. See report mockup on page 2.
Impact: Provide the projected impact of implementing the requested change	Without this report users will either maintain their own records on Excel, or they will need to develop a PeopleSoft query to extract the information required. Either option has a significant probability for error. Providing a standard report from the system of record reduces the campus liability and risk of error.

Requestor Information:	**Name:** Lori Cripps	**Email:** Lori.Cripps@ucsf.edu
	Dept/Control Point: Controller's Office/FAS	**Date:** 5/28/14
	Advisory Group Member Name: Judy Fuller/Julie O'Neal	

For Advisory Group Use Only -- Prioritize this request relative to other requests submitted by your Control Point users:

☐ 5 - Needed	☐ 4 - Recommended	☐ 3 - Nice to Have	☐ 2 - Consider in Future	☐ 1 - Not Needed

Asset Management Report - mockup

Status	Asset Tag ID ▲▼	Asset ID	Custody Code	Custodian	Acquisition/ Disposal Date	Profile ID	Location	Location Desc	Business Unit	Fund	Dept ID	Project	Activity Period	Function	Flexfield	Description	Manufacturer	Model	Serial ID	Purchase Order	Cost
I		999112001038	5318	Denny,Matthew R.	8/11/11	E6654	3002N585	600 16th St	SFCMP	4301	333023	113183A	01	44		CONTAINER, CRYO	FISHER	LOCATOR 6		0000364194	-
I	002000383	000002000383	7672	Denny,Matthew R.	3/13/00	H3410	3002S512	600 16th St	SFCMP	4301	333023	1111111		45		PROJECTOR	EPSON	7350	BBQ0990212K	115241	6,629.00
I	002000442	000002000442	7672	Denny,Matthew R.	3/22/00	E6713	3002S501	600 16th St	SFCMP	4301	333023	1111111		45		CENTRIFUGE, REFRIGERATED	KENDRO	RC-5C		115552	7,854.00
I	002000857	000002000857	7648	Denny,Matthew R.	5/1/00	E7520	3002S132	600 16th St	SFCMP	4301	333023	106097A	01	44		HPLC SYSTEM	LC PACKINGS USA	ULTIMATE	2000-0099	117390	24,885.00
I	002001547	000002001547	7637	Denny,Matthew R.	6/22/00	H3410	3002N104	600 16th St	SFCMP	4000	333023	1111111		45		PROJECTOR, DIGITAL	JVC	DLA-G15U	14410075	118452	14,292.00
I	002001592	000002001592	7637	Denny,Matthew R.	6/26/00	H3455	3002N474B	600 16th St	SFCMP	4000	333023	1111111		45		MONITOR, 50" PLASMA DISPLAY	PIONEER	PDP-50MX	UBSS003720NJ	117982	16,528.00
I	002003576	000002003576	7702	Denny,Matthew R.	11/7/00	E6755	3002N576	600 16th St	SFCMP	4000	333023	1111111				OVEN, MELTING POINT UNIT	BUCHI	B-540	408275010003	121591	3,809.00
I	012000429	000012000429	0141	Sampior,George P.	2/20/01	H0770	3002S132	600 16th St	SFCMP	4000	333023	1111111		45		PROTEOMICS ANALYZER, W/TOF/TOF	APPLIED BIOSYSTEMS	4700	7016	123429	475,714.70
I	012000959	000012000959	7648	Denny,Matthew R.	3/21/01	E6655	3002S132	600 16th St	SFCMP	4000	333023	1111111		45		FREEZER, ULTRALOW UPRIGHT -86C	REVCO	ULT2186-5-D34	P09L-520803-PL	124501	6,659.00

Proposed report columns:

Asset ID data:

Status	Asset Tag ID	Asset ID	Custody Code	Custodian	Acquisition/ Disposal Date	Profile ID	Location	Location Desc

Chartfield data:

Business Unit	Fund	Dept ID	Project	Activity Period	Function	Flex Field

Asset detail data:

Description	Manufacturer	Model	Serial ID	Purchase Order	Cost

Sort Options: Ability to sort and subtotal report by Custody Code, Location Code, Fund, Dept ID, or Project.
Ability to sort ascending/descending by Asset Tag ID

Asset Status Options: Ability to run report by status "In Service" or "All".
Default report status should be "In Service"