

UCSB Equipment Management

**CATS**

(Capital Assets Tracking System)

Online EIMR Processing  
Instruction and Information  
Manual

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# I. PROVIDING ACCESS TO THE ONLINE EIMR

In order for your department to process Online Equipment Inventory Modification Requests, the individuals who prepare and approve them must have access to COMPLETE and to ALLN01.

1. Once this access has been established, your Department Security Administrator (DSA) authorizes your access to the Online EIMR, using your department's standard procedure. You can be authorized to prepare or approve EIMRs, depending upon your role. Your DSA will assign one or both security groups to your account/UserID:

<b>Security Group Code</b>	<b>Security Group Description</b>
CT-PREP	PREPARE EIMRS
CT-APPR	APPROVE EIMRS

*NOTE: In order to ensure proper separation of duties, the same individual should not prepare and approve an EIMR, although this is not prohibited.*

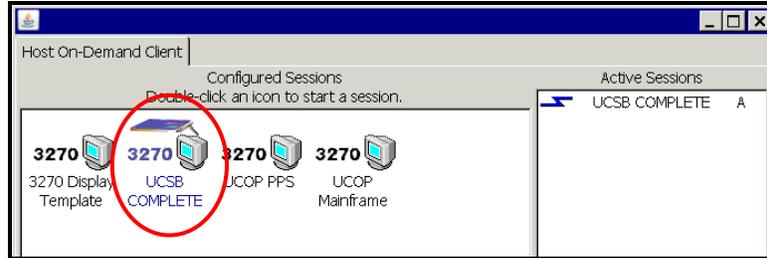
2. Access to inventorial records is restricted by Equipment Management inventorial (custody) codes. Our four digit custody codes are linked to Accounting codes: for example, Purchasing 0403 (custody code) = PURC (Accounting code). The DSA assigns access based upon the Accounting code. If an individual requires access to more than one department (or Accounting code) the DSA must assign access under each separate code.

Please note that CATS cannot restrict access beyond the four-digit inventorial code level, therefore, departments that have many inventorial subcodes consisting of the four-digit inventorial code plus a five-digit fund number cannot restrict an individual's access to only one (or several) of these sub codes.

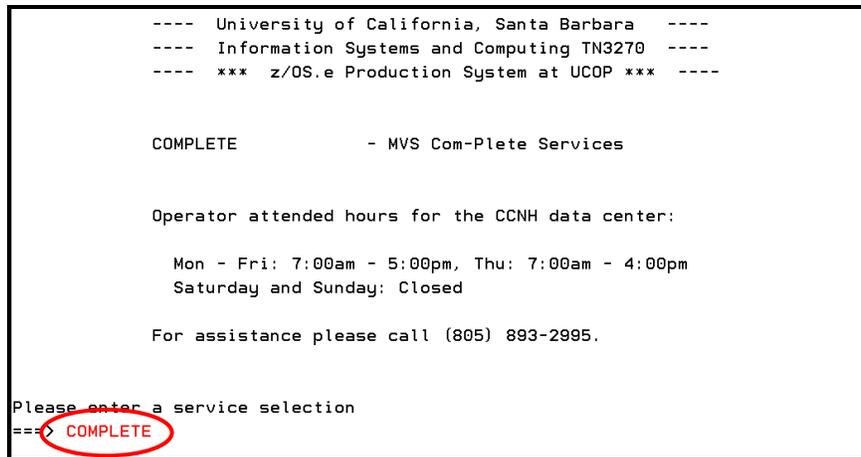
We have attempted to map all of our inventorial codes to specific accounting codes, but errors may have occurred during the process. If you cannot access your records, please contact Vaughn Boyle at x7377. If an error has occurred, a simple change in our custody code table should correct it.

## II. LOGGING ONTO ALLN01 / ONLINE EIMR

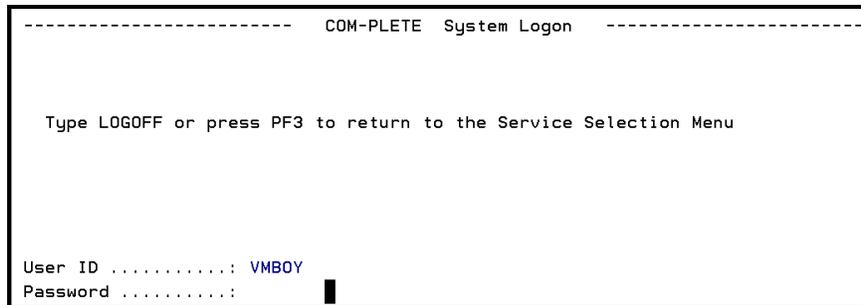
1. On the Host On-Demand, select UCSB COMPLETE by clicking the icon.



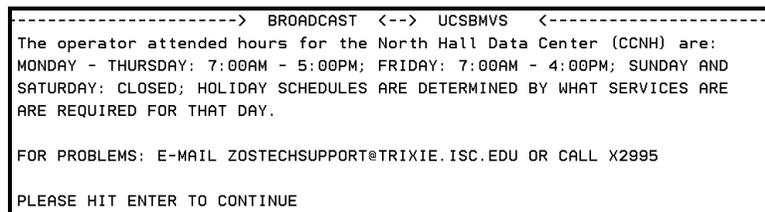
2. On the login page, type **COMPLETE** and hit ENTER.



3. On the COMPLETE login page, type your **User ID** and **Password** and hit ENTER.



4. Hit ENTER to continue past the next screen.



5. On the COM-PASS screen, hit the **F1** key.

```

09:36:08      TID  13      UCSBMVS      User VMBOY      03/27/10
                -- COM-PASS --
                USTS
                Suspended Programs      Program Services
-----
Programs  Name  C Level  PF      Service Description  Programs  ID  PF
-----
                1      13      Natural      NAT22      A  01
                2      14      UPROF      UPROF      B  02
                3      15      Cost of Session  UCOST      C  03
                4      UQ      Full Screen Editor  UEDIT      E  05
                5      Development Natural  DEVNAT      F  06
                6      UDS      UDS      UDS      G  07
                7      UPDS      UPDS      UPDS      H  08
                8
                9
Enter Input:                                HELP      ?

```

6. On the Natural System page, type **ALLN01** as the application, and hit ENTER.

```

Welcome To The UCSB Natural System

Logon to application NEWS to see current Natural 2
news and system change announcements.

Application : ALLN01__

Enter the desired application name or
a ? to see your authorized applications.
The '999' selection is not operational.

FIN will terminate your Natural session.

```

7. On the ALLN01 Main Menu, type **CT – Browse/Update CATS Inv. and EIMR Data** as the System Code and hit ENTER.

```

03/27/10      ***** Financial Systems Functions All-In-One *****      FSAUP017
VMBOY                - Main Menu -                ALLN01

Code      System
-----
RX      Requisition EXpress
AP      Approvals of Requisitions
VE      Vendor File Queries
CT      Browse/Update CATS Inv. and EIMR data
CA      Chart of Accounts

-----
Code: CT
*Dept: BURC

```

*NOTE: Not all of these selections may appear on your screen, as they depend upon your system authorizations.*

8. The CATS Inventory and EIMR Data menu appears, type EI as the System Code and hit ENTER.

```
03/27/10      ***** CATS Inventory and EIMR Data *****      ASEQP100
VMBOY                - Main Menu -                                ALLN01

Code   System
-----
M0    Modify CATS Inventory Data
BR    Browse CATS Inventory Data
EI    Equipment Inventory Modification Request

Code: EI
```

*NOTE: Not all of these selections may appear on your screen, as they depend upon your system authorizations.*

9. The EIMR Main Menu appears, from which you will select either DM or TM, as described in the following sections of the Manual.

```
03/27/10      ***** Equipment Inventory Modification Request *****      ASEQP150
VMBOY                - Main Menu -                                ALLN01

Code   System
-----
DM    EIMR Disposal Menu
TM    EIMR Transfer/Loan/Loan Termination Menu

Code: _
```

### III. INTRODUCTION TO THE ONLINE EQUIPMENT INVENTORY MODIFICATION REQUEST (EIMR)

The Online Equipment Inventory Modification Request (EIMR) provides departments with the ability to submit two types of electronic equipment modification transactions:

1. transfers, loans, and loan terminations
2. direct disposals of assets by departments \*\*

Once an EIMR is has been created by a campus department, it is automatically and electronically routed from the Preparer to the Approver (or Approvers, in the case of transfers or loans in which a receiving department must also approve the EIMR) and then to Equipment Management.

As in other electronic systems (such as Requisition Express (REX) or PPS), the user logon constitutes his or her “electronic signature” on an Online EIMR.

Either Approver, or Equipment Management, may disapprove an EIMR if an error or problem is detected. In this case, the EIMR is automatically routed back to the Preparer for modification or purging. Only the Preparer can modify an EIMR.

Online EIMRs do not have line-item approval. If a multiple-line (asset) EIMR contains one line which must be deleted because it is inappropriate, the EIMR must be returned to the Preparer for modification, then re-routed back along the approval pathway.

Once Equipment Management approves the EIMR, its transactions are transferred into the CATS database and the asset record(s) are updated accordingly.

For record-keeping purposes, a department can print out an “EIMR Report” at any stage of the process, from the moment that an EIMR has been prepared to its final approval by Equipment Management. The current status of the EIMR appears on the EIMR Report. Equipment Management will not send departments a copy of the fully-approved Online EIMR; if a department wishes to have a copy for its files, it must print one.

---

\*\* Disposals of surplus property via pick-up by Central Stores must be processed via the Excess and Surplus Property Disposal form. These disposals require a complicated routing between the originating department, Equipment Management and Central Stores which cannot be handled by the Online EIMR system.

## IV. ONLINE EIMR DEFINITIONS AND DESCRIPTIONS

### The Players

At least three, and sometimes four, individuals must process transactions related to an Online EIMR before it is completed and entered into CATS:

1. **PREPARER** – The individual in the originating department who creates the EIMR. Only the Preparer has the ability to modify an EIMR or purge it from the system.
2. **APPROVER (“FROM” DEPARTMENT)** – The individual in the department originating the EIMR who approves (i.e., “signs”) the EIMR.

While in small departments the Preparer and Approver may be the same individual, it is recommended that two different employees perform these functions in order to maintain separation of duties.

Once approved, the EIMR is sent either to Equipment Management (disposals and transfers/loans to off-campus destinations) or to a “To” Department Approver (interdepartmental transfers/loans).

An Approver may also disapprove an EIMR, returning it to the Preparer for modification or purging.

3. **APPROVER (“TO” DEPARTMENT)** – The individual in the department which receives the equipment (in the case of interdepartmental transfers or loans) who approves (i.e., “signs”) the EIMR.

Once approved, the EIMR is sent to Equipment Management for action.

The “To” Department Approver may also disapprove an EIMR, returning it to the “From” Department Preparer.

4. **TRANSFERRER** – The Equipment Manager, who approves an EIMR and “transfers” the transactions from the ALLN01 environment into the CATS database. The Transferrer may also disapprove an EIMR, returning it to the Preparer.

### Action Codes

Six Action Codes are used to process Online EIMRs. The Action Code field has a Help Screen which may be viewed by either positioning the cursor in the field and hitting **PF1** (Help) or by typing “?” in the field and hitting ENTER. A fuller description of Action Codes follows:

1. **ADD** (create) a new EIMR. This action code is available only to the Preparer.

2. **BROWSE** (view) a list of EIMRs prepared by a department. This action code is available to Preparer, Approver and Transferrer.
3. **CLEAR** the screen contents (if the EIMR number has not yet been added, the screen is cleared of all information; if the EIMR number has been added, all information except the EIMR number is cleared). This action code is available only to the Preparer.
4. **DISPLAY** an existing EIMR. The EIMR number must be entered at the same time. This action code is available to Preparer, Approver and Transferrer.
5. **MODIFY** an existing EIMR (change, delete existing or add new information). The EIMR number must be entered at the same time. This action code is available to Preparer, Approver and Transferrer. The Approver and Transferrer are limited to entering “Y” or “N” in the “Dept Approval” field and entering “Remarks”; only the Preparer may add, change or delete property numbers on the EIMR.
6. **PURGE** an existing EIMR from the file. The EIMR number must be entered at the same time. This action code is available only to the Preparer.

## **Transaction Codes**

There are nine Transaction Codes for Disposals and seven Transaction Codes for Transfer/Loan/Loan Terminations. They are described in detail at the beginning of each of the relevant sections of the Manual.

The Transaction Code field has a Help Screen which may be viewed by either positioning the cursor in the field and hitting **PF1** (Help) or by typing “?” in the field and hitting ENTER.

## **Status Codes**

There are six possible status codes of an Online EIMR:

1. **PREPARED** – The Preparer has created the EIMR and it has been sent to the Approver for action.
2. **APPROVED** – The Approver (“From” Department, in the case of disposals, off-campus and intercampus loans and loan terminations; “To” Department, in the case of interdepartmental transfers and loans) has approved the EIMR and it has been sent to Equipment Management for action.
3. **DISAPPROVED** – The Approver (“From” or “To” Department) has disapproved the EIMR and it has been returned to the Preparer for modification or purging.

4. **FORWARDED** – In the case of interdepartmental transfers or loans, the “From” Department’s Approver has approved the EIMR and it has been forwarded to the “To” Department’s Approver for action. Not applicable to Disposal EIMRs.
5. **RETURNED** – Equipment Management has disapproved the EIMR and it has been returned to the Preparer for modification or purging.
6. **TRANSFERRED** – Equipment Management has approved the EIMR and the transactions on it have been processed and transferred into CATS. The EIMR is officially approved and complete.

# V. GENERAL PROCEDURES

## A. DISPLAYING AN EIMR

Either the Preparer or Approver may display (view) a previously prepared EIMR, as long as he or she knows the EIMR number.

While the following procedure uses the **EIMR Prepare Disposal Screen** as the starting point, the display function can be performed from any of the Prepare or Approve screens, on either the Disposal or Transfer/Loan/Loan Termination menus.

1. In the **Action Code** field, enter **D**.
2. In the **EIMR Number** field, enter the EIMR number.
3. Hit ENTER.

```

05/05/02 ***** Equipment Inventory Modification Request ***** ASEQP152
UMBOY - Prepare Disposal - ALLND
*Action: (A,B,C,D,M,P) D EIMR: 117179 Dept: Status:
*Trans Code: Preparer: Phone:
Remarks:
Jump to Line Nbr: 01 Prepared: Non-UC
Asset Nbr Description Title Value
01
02
03
04
05
Dept Approval: Approver: Date:
Remarks:
Tsfr to CATS: Transferrer: Date:
Direct Command:
  
```

4. The message – **EIMR displayed successfully** – appears. The EIMR may be viewed, modified, printed or purged, depending upon the user’s access privileges.

```

Disposal EIMR displayed successfully
05/05/02 ***** Equipment Inventory Modification Request ***** ASEQP152
UMBOY - Prepare Disposal - ALLND
*Action: (A,B,C,D,M,P) EIMR: 117179 Dept: PURC Status: PREPARED
*Trans Code: 23 Preparer: Boyle,Vaughn M. Phone: 8937377
Remarks: COMPUTERS CANNIBALIZED FOR PARTS
Jump to Line Nbr: 01 Prepared: 05-05-2002 Non-UC
Asset Nbr Description Title Value
01 008001296 MICROCOMPUTER,NOTEBOOK,650MHZ,128MBRAM,6GBHD,24XC Y 2,713.00
02 948003581 MICROCOMPUTER,4MB RAM,250MB HD 3,052.35
03 978003360 MICROCOMPUTER,233MHZ,64MB RAM,4GB HD,12/24XCDROM, 2,971.62
04 998002813 MICROCOMPUTER,256MBRAM,20GBHD,450MHZ,17/40CDROM,1 2,151.00
05 998002819 MICROCOMPUTER,128MBRAM,10GBHD,450MHZ,17/40CDROM,1 1,761.00
Dept Approval: Approver: Date:
Remarks:
Tsfr to CATS: Transferrer: Date:
Direct Command:
  
```

## B. BROWSING EIMRS

The Preparer or Approver may browse the list of EIMRs prepared by the department. Use this function if an EIMR number needs to be determined in order to perform the display function or in order to check the status of an EIMR.

While the following procedure uses the **EIMR Prepare Disposal Screen** as the starting point, the browse function can be performed from any of the Prepare or Approve screens, on either the Disposal or Transfer/Loan/Loan Termination menus.

1. In the **Action Code** field, enter **B**.
2. Hit ENTER.

```
05/05/02 ***** Equipment Inventory Modification Request ***** ASEQP152
UMBOY - Prepare Disposal - ALLND
*Action: (A,B,C,D,H,P) B EIMR: _____ Dept: _____ Status: _____
*Trans Code: _____ Preparer: _____ Phone: _____
Remarks: _____
Jump to Line Nbr: 01 Prepared: _____ Non-UC
Asset Nbr Description Title Value
01 _____
02 _____
03 _____
04 _____
05 _____
Dept Approval: Approver: _____ Date: _____
Remarks: _____
Tsfr to CATS: Transferrer: _____ Date: _____
Direct Command: _____
```

3. The **Browse Disposal EIMRs** Screen appears. Select the number of the EIMR which you wish to view by either moving the cursor to that EIMR number and hitting ENTER or by typing the number in the "EIMR Number" field and hitting ENTER. The EIMR will be displayed.

```
Position cursor or enter screen value to select
05/05/02 ** Equipment Inventory Management Request **
UMBOY - Browse Disposal EIMRs -

Eimr Nbr      Status      Prepared  Approved  Transferred
-----
117179  PREPARED      05-05-2002
117181  PREPARED      05-05-2002
*** End of Data ***

Eimr Type: D Preparer Dept: PURC Eimr Number: _____
Direct command: _____
```

## C. MODIFYING AN EIMR

Only the Preparer can modify an EIMR. If an Approver or Equipment Management requires changes to an EIMR, it must be disapproved and returned to the Preparer.

The following procedure uses the **EIMR Prepare Disposal Screen** as the starting point. The modify function can also be performed on the **EIMR Prepare Transfer/Loan/Loan Termination Screen**.

1. In the **Action Code** field, enter **M**.
2. In the **EIMR Number** field, enter the EIMR number.
3. Hit ENTER.
4. When the EIMR is displayed, make the necessary modifications (in this case, deleting a property number) and hit ENTER.

```

Disposal EIMR displayed successfully
05/05/02      ***** Equipment Inventory Modification Request *****      ASEQP152
UMBOY              - Prepare Disposal -                                  ALLND

*Action: (A,B,C,D,M,P)      M EIMR: 117179 Dept: PURC Status: PREPARED
*Trans Code: 23      Preparer: Boyle,Vaughn M.      Phone: 8937377
Remarks: COMPUTERS CANNIBALIZED FOR PARTS

```

---

```

Jump to Line Nbr: 01      Prepared: 05-05-2002      Non-UC
Asset Nbr Description      Title      Value
01 948003581 MICROCOMPUTER,NOTEBOOK,650MHZ,128MBRAM,6GBHD,24XC Y      2,713.00
02 948003581 MICROCOMPUTER,4MB RAM,250MB HD      3,052.35
03 978003360 MICROCOMPUTER,233MHZ,64MB RAM,4GB HD,12/24XCDROM,      2,971.62
04 998002813 MICROCOMPUTER,256MBRAM,20GBHD,450MHZ,17/40CDROM,1      2,151.00
05 998002819 MICROCOMPUTER,128MBRAM,10GBHD,450MHZ,17/40CDROM,1      1,761.00

```

```

Dept Approval:      Approver:      Date:
Remarks:

```

```

Tsfr to CATS:      Transferrer:      Date:
Direct Command:

```

5. The message – **Disposal EIMR modified successfully** – appears. In this case, only four assets now remain on the EIMR, the fifth having been deleted.

```

Disposal EIMR modified successfully
05/05/02      ***** Equipment Inventory Modification Request *****      ASEQP152
UMBOY              - Prepare Disposal -                                  ALLND

*Action: (A,B,C,D,M,P)      M EIMR: 117179 Dept: PURC Status: PREPARED
*Trans Code: 23      Preparer: Boyle,Vaughn M.      Phone: 8937377
Remarks: COMPUTERS CANNIBALIZED FOR PARTS

```

---

```

Jump to Line Nbr: 01      Prepared: 05-05-2002      Non-UC
Asset Nbr Description      Title      Value
01 948003581 MICROCOMPUTER,4MB RAM,250MB HD      3,052.35
02 978003360 MICROCOMPUTER,233MHZ,64MB RAM,4GB HD,12/24XCDROM,      2,971.62
03 998002813 MICROCOMPUTER,256MBRAM,20GBHD,450MHZ,17/40CDROM,1      2,151.00
04 998002819 MICROCOMPUTER,128MBRAM,10GBHD,450MHZ,17/40CDROM,1      1,761.00
05

```

```

Dept Approval:      Approver:      Date:
Remarks:

```

```

Tsfr to CATS:      Transferrer:      Date:
Direct Command:

```

## D. PURGING AN EIMR

Only the Preparer can purge an EIMR. If either an Approver or Equipment Management requests that an EIMR be purged, it must be disapproved and sent back to the Preparer.

The following procedure uses the **EIMR Prepare Disposal Screen** as the starting point. The purge function can also be performed on the **EIMR Prepare Transfer/Loan/Loan Termination Screen**.

1. In the **Action Code** field, enter **P**.
2. In the **EIMR Number** field, enter the EIMR number.
3. Hit ENTER.

```
05/05/02 ***** Equipment Inventory Modification Request ***** ASEQP152
UMBOY - Prepare Disposal - ALLND
*Action: (A,B,C,D,M,P) P EIMR: 117181 Dept: Status:
*Trans Code: Preparer: Phone:
Remarks:
Jump to Line Nbr: 01 Prepared: Non-UC
Asset Nbr Description Title Value
01 _____
02 _____
03 _____
04 _____
05 _____
Dept Approval: Approver: Date:
Remarks:
Tsfr to CATS: Transferrer: Date:
Direct Command:
```

4. The EIMR is displayed with the message – **Press ENTER to confirm purge** – appearing at the top of the screen.

```
Press ENTER to confirm purge
05/05/02 ***** Equipment Inventory Modification Request ***** ASEQP152
UMBOY - Prepare Disposal - ALLND
*Action: (A,B,C,D,M,P) P EIMR: 117181 Dept: PURC Status: PREPARED
*Trans Code: 22 Preparer: Boyle, Vaughn M. Phone: 8937377
Remarks: LASER PRINTER LOST DURING MOVE FROM HRC TO STORKE-HOLLISTER
Jump to Line Nbr: 01 Prepared: 05-05-2002 Non-UC
Asset Nbr Description Title Value
01 968000024 PRINTER-LASER 2,052.00
02 _____
03 _____
04 _____
05 _____
Dept Approval: Approver: Date:
Remarks:
Tsfr to CATS: Transferrer: Date:
Direct Command:
```

5. Hit ENTER.

- A confirmation box appears, with the message – **Are you sure you want to purge this record (Y/N)?** If the EIMR number is correct, type **Y**. If not, type **N**.

```

***** WARNING *****
ARE YOU SURE YOU WANT TO PURGE THIS RECORD (Y/N)? Y

```

- Hit ENTER.
- The message – **EIMR purged successfully** – appears.

```

Disposal EIMR purged successfully
05/05/02 ***** Equipment Inventory Modification Request ***** ASEQP152
UMBOY - Prepare Disposal - ALLND

*Action: (A,B,C,D,M,P) EIMR: 117181 Dept: PURC Status: PREPARED
*Trans Code: 22 Preparer: Boyle,Vaughn M. Phone: 8937377
Remarks: LASER PRINTER LOST DURING MOVE FROM HRC TO STORKE-HOLLISTER

Jump to Line Nbr: 01 Prepared: 05-05-2002 Non-UC
Asset Nbr Description Title Value
01 968000824 PRINTER-LASER 2,052.00
02 _____
03 _____
04 _____
05 _____

Dept Approval: Approver: Date:
Remarks:

Tsfr to CATS: Transferrer: Date:
Direct Command:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
confm help retrn quit print bkwrd frwr main

```

## E. DETERMINING THE STATUS OF AN EIMR

The status of an EIMR may be determined by either the Preparer or Approver in one of two ways:

1. By using the **Browse** function. The Browse Disposal EIMRs Screen shows the status of each EIMR in the second column of information.

```

Position cursor or enter screen value to select
05/07/02 ** Equipment Inventory Management Request **
UMBOY          - Browse Disposal EIMRs -
    
```

Eimr Nbr	Status	Prepared	Approved Disapproved	Transferred Returned
117179	TRANSFERRED	05-05-2002	05-06-2002	05-06-2002
117182	DISAPPROVED	05-07-2002	05-07-2002	05-06-2002
*** End of Data ***				

```

Eimr Type: D Preparer Dept: PURC Eimr Number: _____
Direct command....: _____
    
```

2. By using the **Display** function. When the EIMR is displayed, the status (Prepared, Approved, Forwarded, etc.) is indicated in the upper right hand corner of the screen, at the far right of the first line of information.

```

Disposal EIMR displayed successfully
05/07/02 ***** Equipment Inventory Modification Request ***** ASEQP157
UMBOY          - Approve Disposal -                               ALLND
    
```

*Action: (B,C,D,M)	D EIMR: 117182	Dept: PURC	Status: DISAPPROVED
*Trans Code: 22	Preparer: Boyle, Vaughn M.	Phone: 8987877	
Remarks: FAX MACHINE LOST DURING MOVE INTO NEW BUILDING			

```

Jump to Line Nbr: 01          Prepared: 05-07-2002          Non-UC
Asset Nbr Description          Title          Value
01 018001015 FACSIMILE MACHINE,600DPI PRINTING,400DPI SCANNING 1,607.00
02 _____
03 _____
04 _____
05 _____
    
```

```

Dept Approval: N Approver: Boyle, Vaughn M.          Date: 05-07-2002
Remarks: THE FAX MACHINE WAS NOT LOST - IT WAS DESTROYED WHEN A CRATE WAS
DROPPED ON IT - PLEASE CHANGE TRANS CODE TO 23
    
```

```

Tsfr to CATS:  Transferrer:          Date:
Direct Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
confm help  retrn quit          print          bkwrd frwr          main
    
```

## F. PRINTING AN EIMR REPORT

An EIMR Report can be printed at any time during the disposal or transfer/loan process. It is recommended that the Preparer print a copy once the EIMR has been created, as a reference in case of questions from another department or Equipment Management.

1. When the EIMR for which you wish to print a report is displayed, hit the **PF5** key.

```

05/07/02      ***** Equipment Inventory Modification Request *****      ASEQP157
UMBOY              - Approve Disposal -                                  ALLND

*Action: (B,C,D,M)      _ EIMR: 117179 Dept: PURC Status: TRANSFERRED
*Trans Code: 23      Preparer: Boyle,Vaughn M.      Phone: 8937377
Remarks: COMPUTERS CANNIBALIZED FOR PARTS

Jump to Line Nbr: 01      Prepared: 05-05-2002      Non-UC
Asset Nbr Description      Title      Value
01 948003581 MICROCOMPUTER,4MB RAM,250MB HD      3,052.35
02 978003360 MICROCOMPUTER,233MHZ,64MB RAM,4GB HD,12/24XCDROM,      2,971.62
03 998002813 MICROCOMPUTER,256MBRAM,20GBHD,450MHZ,17/40CDROM,1      2,151.00
04 998002819 MICROCOMPUTER,128MBRAM,10GBHD,450MHZ,17/40CDROM,1      1,761.00
05

Dept Approval: Y Approver: Boyle,Vaughn M.      Date: 05-06-2002
Remarks: EQUIPMENT MANAGEMENT: THESE COMPUTERS WERE CANNIBALIZED WHEN WE
RECEIVED NEW 2002 DELLs

Tsfr to CATS: Y Transferrer: Boyle,Vaughn M.      Date: 05-06-2002
Direct Command:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
confm help retrn quit      print      bkwrd frwr      main
  
```

2. The **Print EIMR Report** screen appears. The default printer which is used to print your COMPLETE, PPS, etc. jobs will be displayed.

```

05/07/02      ***** Equipment Inventory Modification Request *****      RJENM010
UMBOY              - Print EIMR report -                                  ALLND

User's Name: BOYLE,VAUGHN M.
*Destination: UCSBUM.PURCPRT2
*Priority: 11
Print Lines: 1_ (Thousands)
*Message Class: A
*Job Class: A
CPU Time: 2_ (Minutes)
Account: PU01BOYL
Output Bin: BAB2
*Default Form:
Copies: 1

Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
help retrn quit      submt      main
  
```

3. Hit **PF9** to submit the print job.
4. The message – **ASEQJ156 successfully submitted** – appears in the center of the screen.

ASEQJ156 SUCCESSFULLY SUBMITTED.  
(Press Enter to continue)

5. Hit ENTER. The message is cleared and the main EIMR screen reappears.
6. An EIMR Report prints. It does not resemble the hardcopy EIMR but contains all the same information (and more), in three sections:

Top: Type of EIMR (Disposal or Transfer/Loan/Terminate Loan) and EIMR Number, followed by a block of text containing the Department ID, Department Name and EIMR Status (first line) and Transaction Code (Type) and corresponding Description (second line)

Center: Information related to each asset processed on the EIMR: Asset (Property) Number, Description, Value, Non-UC Title (if applicable) and Custody Code

Bottom: "Signature" blocks for Preparer, Approver(s) and Transferrer (Equipment Management). The date and time that each transaction was processed are included, and any remarks entered by Preparer or Approver(s).

VMBOY	UNIVERSITY OF CALIFORNIA, SANTA BARBARA	PAGE 1
ASEQP156	EQUIPMENT INVENTORY MODIFICATION REQUEST	05/07/02
ASEQR156	DISPOSAL EIMR NUMBER 117179	13:56:04

DEPT ID: PURC	DEPT NAME: PURCHASING OFFICE	STATUS: TRANSFERRED
TRANS CODE: 23	TRANS DESCRIPTION: DESTROYED / CANNIBALIZED FOR PARTS	

ASSET NBR	DESCRIPTION	VALUE	NON-UC TITLE	CUSTODY CODE
948003581	MICROCOMPUTER,4MB RAM, 250MB HD	3,052.35		8 0403 00
978003360	MICROCOMPUTER,233MHZ,64MB RAM,4GB HD,12/24XCDROM,L	2,971.62		8 0403 00
998002813	MICROCOMPUTER,256MBRAM,20GBHD,450MHZ,17/40CDROM,17	2,151.00		8 0403 00
998002819	MICROCOMPUTER,128MBRAM,10GBHD,450MHZ,17/40CDROM,17	1,761.00		8 0403 00

PREPARER ID/DATE	PREPARER REMARKS
VMBOY - Boyle, Vaughn M.	COMPUTERS CANNIBALIZED FOR PARTS
05-05-2002 12:57 Ph: 893-7377	

APPROVER ID/DATE	APPROVER REMARKS
VMBOY - Boyle, Vaughn M.	EQUIPMENT MANAGEMENT: THESE COMPUTERS WERE CANNIBALIZED WHEN WE
05-06-2002 10:22	RECEIVED NEW 2002 DELLS

TRANSFERRER ID/DATE	
VMBOY - Boyle, Vaughn M.	
05-06-2002 10:41	

## VI. DISPOSAL EIMRS

### A. DISPOSAL TRANSACTION CODES AND THEIR USE

(The codes are listed according to the frequency of the type of transaction, not numerically – they run from transaction code 21 through 29.)

1. Destroyed / Cannibalized for Parts – Transaction Code **23**

Used when a department disposes of an asset by placing it directly in the trash, or in cases where an asset is cannibalized for parts before being disposed.

2. Lost / Unable to Locate – Transaction Code **22**

Used when an asset cannot be located and the manner of its disposal cannot be determined.

*In the case of a significant number of lost assets, high-value assets, or recently acquired assets, Equipment Management may require that a department submit a memo explaining the circumstances surrounding the loss and what measures have been undertaken to prevent further loss, before the disposals are processed. The memo must be signed by the Chair or Director and will be attached to the Equipment Management copy of the EIMR.*

3. Theft – Transaction Code **25**

Used when it is determined that an asset has been lost due to theft.

*Additional documentation, in the form of the UCSB Police Report Number (which may be entered into the “Comments” section of the Online EIMR) must be submitted to Equipment Management before the disposal transaction is processed.*

4. Trade-In – Transaction Code **24**

Used when an asset was traded in at the time a new asset was purchased (a copier, for example) and the trade-in was not referenced on the Purchase Order.

5. Sale – Transaction Code **21**

Used when a department sells an asset to an external source (not used in the case of a sale between departments which is treated as a transfer of custody).

**THIS TRANSACTION CODE IS RARELY USED BY DEPARTMENTS.**

*The responsibility for sale of surplus equipment to the public has been delegated to Central Stores. Departments may NOT sell assets directly to the public, except after they have obtained the approval of the Manager of Central Stores.*

6. Return of Government-Title Equipment – Transaction Code **26**

Used when a Government-title asset is shipped to the funding agency as part of the contract or grant close-out.

*A letter or official communication from the funding agency requesting the transfer must be sent to Equipment Management.*

**CONSULT WITH EQUIPMENT MANAGEMENT BEFORE USING THIS TRANSACTION CODE.**

7. Disposal of Government-Title Equipment – Transaction Code **28**

Used when, during the course of a Federal contract or grant, a Government-title asset is disposed of (cannibalized for parts, destroyed, lost, stolen, etc.).

*A letter or official communication from the funding agency, authorizing the disposal, must be sent to Equipment Management as documentation.*

**CONSULT WITH EQUIPMENT MANAGEMENT BEFORE USING THIS TRANSACTION CODE.**

8. Miscellaneous – Transaction Code **29**

Used in a variety of situations; for example, the return or disposal of non-Government, non-UC-title equipment, or donations of equipment by the University.

**CONSULT WITH EQUIPMENT MANAGEMENT BEFORE USING THIS TRANSACTION CODE.**

*In the case of donations, the disposal transaction can be processed only after the Materiel Manager has approved the donation. Additional documentation, in the form of a letter of request from the outside agency (generally, a school or approved non-profit organization), must also be submitted to Equipment Management.*

9. Intercampus Transfer – Transaction Code **26**

Used when equipment is permanently transferred to another UC campus, usually accompanying the transfer of a faculty member.

*Since an Intercampus Transfer must be signed by the Equipment Manager at the campus which is receiving the equipment, once Equipment Management receives an Online EIMR for this type of transaction, it will convert the data into a paper EIMR which will be sent to the second campus. Once this paper EIMR is approved and returned to Santa Barbara, the Online transaction will be processed and the asset deleted from the inventory of the Santa Barbara department.*

## B. PREPARING A DISPOSAL EIMR

1. On the **Equipment Inventory Modification Request Main Menu**,
  - a. Type (Code) **DM**.
  - b. Hit ENTER.

```
05/05/02 ***** Equipment Inventory Modification Request ***** ASEQP150
UMBOY - Main Menu - ALLND

Code System
-----
DM EIMR Disposal Menu
TM EIMR Transfer/Loan/Loan Termination Menu

Code: DM
*Dept: PURC
```

2. On the **EIMR Disposal Menu**,
  - a. Type (Code) **PE**.
  - b. Hit ENTER.

```
05/05/02 ***** Equipment Inventory Modification Request ***** ASEQP160
UMBOY - Disposals - ALLND

Code System
-----
PE Prepare EIMR Disposal Form
AE Approve EIMR Disposal Form
TE Transfer Approved EIMR Disposals to CATS
TD Browse Transferred Disposal EIMRs

Code: PE
*Dept: PURC
```

3. On the **EIMR Prepare Disposal Screen**,
  - a. In the **Action Code** field, enter **A** to add (create) a new EIMR disposal transaction.
  - b. In the **Transaction Code** field, enter the code which corresponds to the type of disposal transaction which you are processing. **23**, for example = Destroyed/ Cannibalized for Parts.
  - c. Enter your **Telephone Number** (optional, but helpful in case Equipment Management needs to contact you with questions about the EIMR).

- d. Enter any **Remarks** (optional, but helpful to Equipment Management in processing the EIMR). The Remarks become part of the permanent record and can be helpful to departments in tracking EIMRs. If back-up documentation is being mailed to Equipment Management, it should be noted in the Remarks field.
- e. Enter the **Asset (Property) Number(s)** of the asset(s) being disposed.

While the **EIMR Prepare Disposal Screen** has space to show only 5 assets, up to 99 Asset Numbers may be entered. Once the first 5 have been entered, hit **PF8** to display entry positions 6-10, repeating as often as necessary. Scroll back and forth through the list of property numbers by using the **PF7** (backward) and **PF8** (forward) keys, or by typing a line number in the **Jump to Line Nbr** field which immediately precedes the list of Asset Numbers.

```

No action performed
05/05/02 ***** Equipment Inventory Modification Request ***** ASEQP152
UMBOY - Prepare Disposal - ALLND

*Action: (A,B,C,D,M,P) A EIMR: _____ Dept: Status:
*Trans Code: 23 Preparer: Phone: 8937377
Remarks: COMPUTERS CANNIBALIZED FOR PARTS

Jump to Line Nbr: 01 Prepared: Non-UC
Asset Nbr Description Title Value
01 948003581
02 998002819
03 978003360
04 998002813
05 _____

Dept Approval: Approver: Date:
Remarks:

Tsfr to CATS: Transferrer: Date:
Direct Command:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
confm help retrn quit print bkwrd frwrd main
  
```

- f. Once all of the information which has been checked and verified, hit ENTER.
- g. The message – **Disposal EIMR added successfully** – appears.

```

Disposal EIMR added successfully
05/05/02 ***** Equipment Inventory Modification Request ***** ASEQP152
UMBOY - Prepare Disposal - ALLND

*Action: (A,B,C,D,M,P) EIMR: 117179 Dept: PURC Status: PREPARED
*Trans Code: 23 Preparer: Boyle,Vaughn M. Phone: 8937377
Remarks: COMPUTERS CANNIBALIZED FOR PARTS

Jump to Line Nbr: 01 Prepared: 05-05-2002 Non-UC
Asset Nbr Description Title Value
01 948003581 MICROCOMPUTER,4MB RAM,250MB HD 3,052.35
02 978003360 MICROCOMPUTER,233MHZ,64MB RAM,4GB HD,12/24XCDROM, 2,971.62
03 998002813 MICROCOMPUTER,256MBRAM,20GBHD,450MHZ,17/40CDROM,1 2,151.00
04 998002819 MICROCOMPUTER,128MBRAM,10GBHD,450MHZ,17/40CDROM,1 1,761.00
05 _____

Dept Approval: Approver: Date:
Remarks:

Tsfr to CATS: Transferrer: Date:
  
```

Information is automatically entered into certain fields: **EIMR Number**, **Department** and **Preparer** (determined by the COMPLETE log-on ID). The **Status** of the EIMR appears as **PREPARED**.

The property numbers of the assets have been sorted from lowest to highest, if not originally entered sequentially.

The Disposal EIMR has been sent to the departmental EIMR Approver for action.

**The system does not notify the Approver that the EIMR has been sent:** the Preparer must inform the Approver in person or via email or phone. The Preparer must provide the Approver with the EIMR number, since the Approver needs it in order to display and approve (disapprove) the EIMR.

Equipment Management cannot view the EIMR until it has been approved and released by the department.

\*\*\*\*\*

## POSSIBLE ERROR MESSAGE

If the property number of an asset which is not in the custody of the Preparer's department has been entered, an error message will appear at the top of the screen: **ACCESS RESTRICTED TO DEPT.** The asset in question will appear at the top of the list (its line number will also appear in the "Jump to Line Nbr" field).

Access restricted to dept: MATERIALS RESEARCH LAB ( MTRL )			
05705702	***** Equipment Inventory Modification Request *****	ASEQP152	ALLND
UMBOY	- Prepare Disposal -		
*Action: (A,B,C,D,M,P)      M EIMR: 117179    Dept: PURC    Status: PREPARED			
*Trans Code: 23      Preparer: Boyle, Vaughn M.      Phone: 8937377			
Remarks: COMPUTERS CANNIBALIZED FOR PARTS			
<hr/>			
Jump to Line Nbr: 05	Prepared: 05-05-2002	Non-UC	
Asset Nbr	Description	Title	Value
05 018001234	MICROCOMPUTER, 1200MHZ, 256MB, 40GB, 32XCDRW		1,935.00
06	_____		
07	_____		
08	_____		
09	_____		
Dept Approval:	Approver:	Date:	
Remarks:			
Tsfr to CATS:	Transferrer:	Date:	

The EIMR cannot be created until this property number has been deleted: use the space bar to blank it out, then hit ENTER again.

If there are multiple assets in the custody of another department the warning message will reappear until all have been deleted.

The department which has official custody of the asset must be contacted: only it can prepare and submit an Online EIMR to dispose of the asset.

## CAUTION

If title to an asset does not vest with the University, a Y appears in the “Non-UC Title” field on the line containing the property number.

05/05/02	***** Equipment Inventory Modification Request *****	ASEQP152
UMBOY	- Prepare Disposal -	ALLND
*Action: (A,B,C,D,M,P) - EIMR: 117179 Dept: PURC Status: PREPARED		
*Trans Code: 23 Preparer: Boyle, Vaughn M. Phone: 8937377		
Remarks: COMPUTERS CANNIBALIZED FOR PARTS		
Jump to Line Nbr: 01	Prepared: 05-05-2002	Non-UC Title
Asset Nbr	Description	Value
01 008001296	MICROCOMPUTER,NOTEBOOK,650MHZ,128MBRAM,6GBHD,24XC Y	2,713.00
02 948003581	MICROCOMPUTER,4MB RAM,250MB HD	3,052.35
03 978003360	MICROCOMPUTER,233MHZ,64MB RAM,4GB HD,12/24XCDROM,	2,971.62
04 998002813	MICROCOMPUTER,256MBRAM,20GBHD,450MHZ,17/40CDROM,1	2,151.00
05 998002819	MICROCOMPUTER,128MBRAM,10GBHD,450MHZ,17/40CDROM,1	1,761.00
Dept Approval:	Approver:	Date:
Remarks:		
Tsfr to CATS:	Transferrer:	Date:

The EIMR will not be blocked, but it is important to remember that the University cannot normally dispose of assets to which it does not hold title without prior written approval of from the agency.

If the Y appears in this field, Equipment Management will ask for back-up documentation in the form of a letter or email from the agency, confirming that it approves of the disposal. If this documentation is not provided, Equipment Management may return the EIMR to the department for modification (for example, deletion of the problem property number).

## C. APPROVING A DISPOSAL EIMR

1. On the **EIMR Disposal Menu**,
  - a. Type (Code) **AE**.
  - b. Hit ENTER.

```

05/06/02      ***** Equipment Inventory Modification Request *****      ASEQP160
UMBOY              - Disposals -                                  ALLND

      Code      System
      -----
      PE      Prepare EIMR Disposal Form
      AE      Approve EIMR Disposal Form
      TE      Transfer Approved EIMR Disposals to CATS
      TD      Browse Transferred Disposal EIMRs

      -----
Code: AE
*Dept: PURC
  
```

2. On the **EIMR Approve Disposal Screen**,
  - a. In the **Action Code** field, enter **M** to modify (approve) the EIMR.
  - b. In the **EIMR Number** field, enter the number of the EIMR to be approved.
  - c. Hit ENTER.

```

No action performed
05/06/02      ***** Equipment Inventory Modification Request *****      ASEQP157
UMBOY              - Approve Disposal -                                  ALLND

*Action: (B,C,D,M)      M EIMR: 117179      Dept:      Status:
*Trans Code:      Preparer:      Phone:
Remarks:

Jump to Line Nbr: 01      Prepared:      Non-UC
Asset Nbr Description      Title      Value
01 _____
02 _____
03 _____
04 _____
05 _____

Dept Approval:      Approver:      Date:
Remarks:

Tsfr to CATS:      Transferrer:      Date:
  
```

3. If there are no problems with the EIMR, tab down to the **Dept Approval** field and enter **Y**. If desired, or necessary, add **Remarks**.

4. Hit ENTER.

```

Enter changes
05/06/02 ***** Equipment Inventory Modification Request ***** ASEQP157
UMBOY - Approve Disposal - ALLND

*Action: (B,C,D,M) M EIMR: 117179 Dept: PURC Status: PREPARED
*Trans Code: 23 Preparer: Boyle,Vaughn M. Phone: 8937377
Remarks: COMPUTERS CANNIBALIZED FOR PARTS

Jump to Line Nbr: 01 Prepared: 05-05-2002 Non-UC
Asset Nbr Description Title Value
01 948003581 MICROCOMPUTER,4MB RAM,250MB HD 3,052.35
02 978003360 MICROCOMPUTER,233MHZ,64MB RAM,4GB HD,12/24XCDROM, 2,971.62
03 998002813 MICROCOMPUTER,256MBRAM,20GBHD,450MHZ,17/40CDROM,1 2,151.00
04 998002819 MICROCOMPUTER,128MBRAM,10GBHD,450MHZ,17/40CDROM,1 1,761.00
05

Dept Approval: Y Approver: Date:
Remarks: EQUIPMENT MANAGEMENT: THESE COMPUTERS WERE CANNIBALIZED WHEN WE
RECEIVED NEW 2002 DELLs

Tsfr to CATS: Transferrer: Date:
Direct Command:
Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
confm help retrn quit print bkwrđ frwrđ main
  
```

5. The message – **Disposal EIMR modified successfully** – appears.

```

Disposal EIMR modified successfully
05/06/02 ***** Equipment Inventory Modification Request ***** ASEQP157
UMBOY - Approve Disposal - ALLND

*Action: (B,C,D,M) EIMR: 117179 Dept: PURC Status: APPROVED
*Trans Code: 23 Preparer: Boyle,Vaughn M. Phone: 8937377
Remarks: COMPUTERS CANNIBALIZED FOR PARTS

Jump to Line Nbr: 01 Prepared: 05-05-2002 Non-UC
Asset Nbr Description Title Value
01 948003581 MICROCOMPUTER,4MB RAM,250MB HD 3,052.35
02 978003360 MICROCOMPUTER,233MHZ,64MB RAM,4GB HD,12/24XCDROM, 2,971.62
03 998002813 MICROCOMPUTER,256MBRAM,20GBHD,450MHZ,17/40CDROM,1 2,151.00
04 998002819 MICROCOMPUTER,128MBRAM,10GBHD,450MHZ,17/40CDROM,1 1,761.00
05

Dept Approval: Y Approver: Boyle,Vaughn M. Date: 05-06-2002
Remarks: EQUIPMENT MANAGEMENT: THESE COMPUTERS WERE CANNIBALIZED WHEN WE
RECEIVED NEW 2002 DELLs

Tsfr to CATS: Transferrer: Date:
Direct Command:
Enter--PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
confm help retrn quit print bkwrđ frwrđ main
  
```

Information is automatically entered into the **Approver** and **Date** fields. The **Status** of the EIMR appears as **APPROVED**.

The Disposal EIMR has been sent to Equipment Management for action. When Equipment Management approves the EIMR, its status will be updated to **TRANSFERRED**. When this status appears, the department knows that the EIMR has been processed and that all transactions have been transferred over to the CATS database.

## D. DISAPPROVING (RETURNING) A DISPOSAL EIMR

Follow all of the steps outlined under C. above until the EIMR has been displayed.

1. Enter **N** into the **Dept Approval** field.

Add **Remarks**, if desired. The Approver will need to inform the Preparer why the EIMR has been disapproved (incorrect Property Number or Transaction Code, etc.). This may be done via the Remarks, a direct conversation or email, especially if the explanation is too lengthy to fit into the Remarks section.

2. Hit ENTER.

```
Disposal EIMR displayed successfully
05/07/02 ***** Equipment Inventory Modification Request ***** ASEQP157
UMBOY - Approve Disposal - ALLND

*Action: (B,C,D,M) M EIMR: 117182 Dept: PURC Status: PREPARED
*Trans Code: 22 Preparer: Boyle,Vaughn M. Phone: 8937377
Remarks: FAX MACHINE LOST DURING MOVE INTO NEW BUILDING

Jump to Line Nbr: 01 Prepared: 05-07-2002 Non-UC
Asset Nbr Description Title Value
01 018001015 FACSIMILE MACHINE,600DPI PRINTING,400DPI SCANNING 1,607.00
02 _____
03 _____
04 _____
05 _____

Dept Approval: N Approver: Date:
Remarks: THE FAX MACHINE WAS NOT LOST - IT WAS DESTROYED WHEN A CRATE WAS
DROPPED ON IT - PLEASE CHANGE TRANS CODE TO 23

Tsfr to CATS: Transferrer: Date:
```

3. The message – **Disposal EIMR modified successfully** – appears.

```
Disposal EIMR modified successfully
05/07/02 ***** Equipment Inventory Modification Request ***** ASEQP157
UMBOY - Approve Disposal - ALLND

*Action: (B,C,D,M) - EIMR: 117182 Dept: PURC Status: DISAPPROVED
*Trans Code: 22 Preparer: Boyle,Vaughn M. Phone: 8937377
Remarks: FAX MACHINE LOST DURING MOVE INTO NEW BUILDING

Jump to Line Nbr: 01 Prepared: 05-07-2002 Non-UC
Asset Nbr Description Title Value
01 018001015 FACSIMILE MACHINE,600DPI PRINTING,400DPI SCANNING 1,607.00
02 _____
03 _____
04 _____
05 _____

Dept Approval: N Approver: Boyle,Vaughn M. Date: 05-07-2002
Remarks: THE FAX MACHINE WAS NOT LOST - IT WAS DESTROYED WHEN A CRATE WAS
DROPPED ON IT - PLEASE CHANGE TRANS CODE TO 23

Tsfr to CATS: Transferrer: Date:
```

Information is automatically entered into the **Approver** and **Date** fields. The **Status** of the EIMR appears as **DISAPPROVED**. Depending upon the nature of the problem, the Preparer will need to either modify or purge the EIMR.

**NOTE:** If the Preparer modifies the EIMR, any Remarks entered by the Approver are cleared when it is re-sent to the Approver. The Approver may enter new Remarks at the time that the EIMR is received for the second time.

## VII. TRANSFER/LOAN/LOAN TERMINATION EIMRS

### A. TRANSFER/LOAN/LOAN TERMINATION TRANSACTION CODES AND THEIR USE

Following Interdepartmental Transfers, the remaining six transaction codes for Loans/Loan Terminations are listed in pairs: the code for the loan followed by the code for the corresponding loan termination. Interdepartmental and, especially, intercampus loans are very infrequent.

#### 1. Interdepartmental Transfer – Transaction Code **90**

Used when the custody of an asset is permanently transferred from one department to another. Both departments must approve the transaction.

*Intercampus Transfers (transaction code 26) are considered DISPOSALS, since the assets are permanently deleted from the UCSB inventory at the time of the transfer. Therefore, they are covered in the previous chapter.*

#### 2. Interdepartmental Loan – Transaction Code **96**

Used when one department loans an asset to another **for a period of six months or more**. (Do not submit an EIMR if the loan is for a shorter period.) Both departments must approve the transaction.

*The asset continues to appear on the original department's inventory and only the original department can initiate transactions involving it.*

#### 3. Terminate Interdepartmental Loan – Transaction Code **11**

Used to terminate the preceding Interdepartmental Loan transaction. Removes the Loan Code from the asset record and terminates the loan period.

*The loan termination transaction must be prepared by the original ("From") department because the asset remains on its inventory and only it can initiate transactions involving the loaned asset.*

#### 4. Off-Campus Loan – Transaction Code **95**

Used in the case of off-campus use of an asset, **for a period of six months or more**. The off-campus use may be by a University employee (usually at his or her residence, or at a research station) or by a non-University individual or agency (local school district, non-profit foundation, etc.).

*The departmental custody remains unchanged during the loan period since neither employees nor non-University individuals or agencies have custody codes.*

5. Terminate Off-Campus Loan – Transaction Code **10**

Used to terminate the preceding Off-Campus Loan transaction. Removes the Loan Code from the asset record and terminates the loan period.

6. Intercampus Loan – Transaction Code **97**

Used when equipment is loaned to another UC campus **for a period of six months or more**. If the loan is to a University outside of the UC system, Transaction Code 95 – Off-Campus Loan – is used. The asset continues to appear on the original UCSB department's custody during the loan period.

*Since an Intercampus Loan must be signed by the Equipment Manager at the campus which is borrowing the equipment, once Equipment Management receives an Online EIMR for this type of transaction, it converts the data into a paper EIMR which is sent to the borrowing campus. Once this paper EIMR is approved and returned to Santa Barbara, the Online transaction is processed and the loan transaction recorded.*

7. Terminate Intercampus Loan – Transaction Code **12**

Used to terminate the preceding Intercampus Loan transaction. Removes the Loan Code from the asset record and terminates the loan period.

*The campus to which the asset was loaned will initiate the loan termination EIMR. When the paper EIMR is received by the Santa Barbara department, it inputs the data as an Online transaction and forwards the hard copy EIMR to Equipment Management.*

## B. PREPARING AN INTERDEPARTMENTAL TRANSFER

1. On the **Equipment Inventory Modification Request Main Menu**,
  - a. Type (Code) **TM**.
  - a. Hit ENTER.

```
05/17/02      ***** Equipment Inventory Modification Request *****      ASEQP150
UMBOY              - Main Menu -              ALLND

Code   System
-----
DM     EIMR Disposal Menu
TM     EIMR Transfer/Loan/Loan Termination Menu

Code: TM
*Dept: PURC
```

2. On the **EIMR Transfers/Loans/Loan Terminations Menu**,
  - a. Type (Code) **PT**.
  - b. Hit ENTER.

```
05/17/02      ***** Equipment Inventory Modification Request *****      ASEQP180
UMBOY              - Transfers/Loans/Loan Terminations -              ALLND

Code   Functions
-----
PT     Prepare EIMR Transfer/Loan/Loan Term.
A1     From Approver Approve EIMR Transfers
A2     To Approver Approve EIMR Transfers
TE     Transfer Approved EIMR Transfers to CATS
TD     Browse Transferred EIMR Transfers/Loans

Code: PT
*Dept: PURC
```

3. On the **EIMR Prepare Transfer/Loan/Loan Termination Screen**,
  - a. In the **Action Code** field, enter **A** to add (create) a new EIMR.
  - b. In the **Transaction Code** field, enter transaction code **90**.
  - c. Enter the Preparer's **Telephone Number** (optional, but helpful in case Equipment Management has questions about the EIMR).
  - d. Enter information pertaining to the department to which the equipment is being transferred – usually it must be obtained from the “To” Department.

- i. **Custodial Code** – Mandatory. Enter the “To” Department’s custody code.
  - ii. **Building Number** – Mandatory. Enter the number of the building in which the asset(s) will be located.  
*If the equipment is not changing physical location, just custody, the old (current) building number must be re-entered.*
  - iii. **Room Number** – Optional. The EIMR can be processed without it, but this information is recommended for equipment tracking.
  - iv. **User** – Optional. The EIMR can be processed without it, but it is recommended that this information be added.
- e. Enter any **Remarks**. They are optional, but can prove helpful to both the “To” Department and Equipment Management in processing the EIMR. If back-up documentation is being mailed to Equipment Management, all note this.
- f. Enter the **Asset (Property) Number(s)** of the asset(s) being transferred.

While the **EIMR Prepare Transfer/Loan/Loan Termination Screen** has space to show only 3 assets at any one time, up to 99 Asset (Property) Numbers may be entered. Once the first 3 property numbers have been entered, hit **PF8** to display entry positions 4-6, repeating as necessary. Scroll back and forth through the list of property numbers by using the **PF7** (backward) and **PF8** (forward) keys, or by typing a line number in the **Jump to Line Nbr** field.

- g. Hit ENTER.

```

03/26/10      ***** Equipment Inventory Modification Request *****      ASEQP172
VMBOY        - Prepare Transfer/Loan/Loan Termination -                    ALLND

*Action: (A,B,C,D,M,P)      A EIMR: _____ Dept:      Status:
*Trans Code: 90      Preparer: _____ Phone:
  To Dept:      Custody Code: 8 0871 00____ Bldg: 568 Room: _____ User: ____
Remarks: TRANSFER CUSTODY OF OLC COPIER TO ACCOUNTING/AP_____

Jump to Line Nbr: 01      Prepared: _____ Non-UC
      Asset Nbr Description      Title      Value
01 018002354
02 _____
03 _____

From Approval:  Approver: _____ Date:
Remarks:
To Approval:  Approver: _____ Date:
Remarks:

Tsfr to CATS:  Transferrer: _____ Date:

```

5. The message – **Transfer EIMR added successfully** – appears.

```

Transfer EIMR added successfully
03/26/10      ***** Equipment Inventory Modification Request *****      ASEQP172
VMBOY          - Prepare Transfer/Loan/Loan Termination -                  ALLND

*Action: (A,B,C,D,M,P)      EIMR: 119874 Dept: PURC Status: PREPARED
*Trans Code: 90      Preparer: Boyle,Vaughn M.      Phone:
To Dept: ACTG Custody Code: 8 0871 00__ Bldg: 568 Room: _____ User: __
Remarks: TRANSFER CUSTODY OF OLC COPIER TO ACCOUNTING/AP_____

-----
Jump to Line Nbr: 01      Prepared: 03-26-2010      Non-UC
      Asset Nbr Description      Title      Value
01 018002354 COPIER/PRINTER-DIGITAL      7,740.00
02 _____
03 _____

From Approval: Approver:      Date:
Remarks:
To Approval: Approver:      Date:
Remarks:

Tsfr to CATS: Transferrer:      Date:

```

Information is automatically entered into certain fields: **EIMR Number**, **Department** and **Preparer** (determined by the COMPLETE log-on ID). The **Status** of the EIMR appears as **PREPARED**.

The property numbers of the assets have been sorted from lowest to highest, if not originally entered sequentially.

The EIMR has been sent to the “From” Department EIMR Approver for action.

## C. APPROVING (DISAPPROVING) AN INTERDEPARTMENTAL TRANSFER – “FROM” DEPARTMENT

1. Following receipt of the preceding email message, on the **EIMR Transfers/Loans/Loan Terminations Menu**,
  - a. Type (Code) **A1**.
  - b. Hit ENTER.

```

05/17/02      ***** Equipment Inventory Modification Request *****      ASEQP180
UMBOY        - Transfers/Loans/Loan Terminations -                        ALLND

      Code      Functions
      -----
      PT      Prepare EIMR Transfer/Loan/Loan Term.
      A1      From Approver Approve EIMR Transfers
      A2      To Approver Approve EIMR Transfers
      TE      Transfer Approved EIMR Transfers to CATS
      TD      Browse Transferred EIMR Transfers/Loans

      -----
Code:  A1
*Dept: PURC
  
```

From this point onward, the procedure for the “From” Department approval (or disapproval) of an Interdepartmental Transfer EIMR is exactly the same as for a Disposal EIMR. Follow the steps outlined under Chapters V.C. or V.D. above, depending upon the case.

2. In order to approve the EIMR, enter **Y** in the **From Approval** field.

When the message – **Transfer EIMR modified successfully** – appears, it has been sent to the “To” Department Approver. Its status is **FORWARDED**.

```

Transfer EIMR modified successfully
05/17/02      ***** Equipment Inventory Modification Request *****      ASEQP177
UMBOY        - Source Dept Approve Transfer/Loan/Loan Termination -      ALLND

*Action: (B,D,M)      EIMR: 117239 Dept: PURC      Status: FORWARDED
*Trans Code: 90      Preparer: Boyle,Vaughn M.      Phone: 8937377
To Dept: ACTG Custodial Code: 8 0871 00      Bldg: 568 Room: 3201 User: SF
Remarks: INTERDEPARTMENTAL TRANSFER OF LASER PRINTER, PER AGREEMENT BETWEEN
DIRECTORS
Jump to Line Nbr: 01      Prepared: 05-17-2002      Non-UC
Asset Nbr Description      Title      Value
01 968000824 PRINTER-LASER      2,052.00
02 _____
03 _____

From Approval: Y Approver: Boyle,Vaughn M.      Date: 05-17-2002
Remarks: THIS IS THE PRINTER DISCUSSED AT YESTERDAY'S MEETING
To Approval: Approver:      Date:
Remarks:
Tsfr to CATS: Transferrer:      Date:
  
```

An email message has been created and directed to the designated Approver in the “To” Department.

The subject line of the email reads: **EIMR needs your approval**

The text of the message reads:

The following EIMR requires your approval:  
EIMR Number : \*\*\*\*\* Date: \*\*\_\*\*\_\*\*\*\* at \*\*:\*\*  
Description : Approve a Transfer, Loan or Loan Termination  
Initiated By : ([Originating Department Preparer's Name](#))

Please logon to ALLN01 to approve or deny this EIMR at your earliest convenience.

## D. APPROVING AN INTERDEPARTMENTAL TRANSFER – “TO” DEPARTMENT

1. Following receipt of the preceding email message, on the **EIMR Transfers/Loans/Loan Terminations Menu**,
  - a. Type (Code) **A2**.
  - b. Hit ENTER.

```

05/17/02 ***** Equipment Inventory Modification Request ***** ASEQP180
UMBOY - Transfers/Loans/Loan Terminations - ALLND

Code Functions
-----
PT Prepare EIMR Transfer/Loan/Loan Term.
A1 From Approver Approve EIMR Transfers
A2 To Approver Approve EIMR Transfers
TE Transfer Approved EIMR Transfers to CATS
TD Browse Transferred EIMR Transfers/Loans

-----
Code: A2
*Dept: ACTG
  
```

From this point onward, the procedure for the “To” Department approval (or disapproval) of an Interdepartmental Transfer EIMR is exactly the same as for a Disposal EIMR. Follow the steps outlined under Chapter V.C. or V.D. above, depending upon the case.

2. In order to approve the EIMR, enter **Y** in the **To Approval** field.

When the message – **Transfer EIMR modified successfully** – appears, the EIMR has been sent to Equipment Management. Its status is **APPROVED**.

```

Transfer EIMR modified successfully
05/17/02 ***** Equipment Inventory Modification Request ***** ASEQP178
UMBOY - Receiving Dept Approve Transfer/Loan/Loan Termination - ALLND

*Action: (B,D,M) EIMR: 117239 Dept: PURC Status: APPROVED
*Trans Code: 90 Preparer: Boyle,Vaughn M. Phone: 8937377
To Dept: ACTG Custodial Code: 8 0871 00 Bldg: 568 Room: 3201 User: SF
Remarks: INTERDEPARTMENTAL TRANSFER OF LASER PRINTER, PER AGREEMENT BETWEEN
DIRECTORS
Jump to Line Nbr: 01 Prepared: 05-17-2002 Non-UC
Asset Nbr Description Title Value
01 968000824 PRINTER-LASER 2,052.00
02
03

From Approval: Y Approver: Boyle,Vaughn M. Date: 05-17-2002
Remarks: THIS IS THE PRINTER DISCUSSED AT YESTERDAY'S MEETING
To Approval: Y Approver: Boyle,Vaughn M. Date: 05-17-2002
Remarks:
Isfr to CATS: Transferrer: Date:
  
```

When Equipment Management approves the EIMR, its status will be updated to **TRANSFERRED**. When this status appears, both “From” and “To” Departments know that the EIMR has been processed and that all transactions contained on it have been transferred to the CATS database.

## E. DISAPPROVING AN INTERDEPARTMENTAL TRANSFER – RECEIVING (“TO”) DEPARTMENT

1. Follow all of the procedures outlined in the Chapter VI.D.
2. In order to disapprove the EIMR, enter **N** in the **To Approval** field.

When the message – **Transfer EIMR modified successfully** – appears, the EIMR has been sent back to the Preparer in the “From” Department. Its status is **DISAPPROVED**.

```

Transfer EIMR modified successfully
05/17/02      ***** Equipment Inventory Modification Request *****      ASEQP178
UMBOY      - Receiving Dept Approve Transfer/Loan/Loan Termination -      ALLND

*Action: (B,D,M)      EIMR: 117242 Dept: PURC Status: DISAPPROVED
*Trans Code: 90      Preparer: Boyle,Vaughn M.      Phone: 8937377
To Dept: ACTG Custodial Code: 8 0871 00      Bldg: 568 Room: 3201      User: SF
Remarks: TRANSFER OF SURPLUS COMPUTER TO ACCOUNTING

Jump to Line Nbr: 01      Prepared: 05-17-2002      Non-UC
Asset Nbr Description      Title      Value
01 998002821 MICROCOMPUTER,128MBRAM,10GBHD,450MHZ,17/40CDROM,1      1,761.00
02 _____
03 _____

From Approval: Y Approver: Boyle,Vaughn M.      Date: 05-17-2002
Remarks: TRANSFER OF COMPUTER, PER MEETING OF 05/16/02
To Approval: N Approver: Boyle,Vaughn M.      Date: 05-17-2002
Remarks: THERE IS A TYPO IN THE PROPERTY # - SHOULD BE 998002812

Tsfr to CATS: Transferrer:      Date:
Direct Command:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
confm help retrn quit      print      bkwrd frwr      main
  
```

In addition, an email message has been created and directed to the Approver in the “From” Department.

The subject line of the email reads: **EIMR needs your review**

The text of the message reads:

The following EIMR requires your attention:  
 EIMR Number : \*\*\*\*\* Date: \*\*-\*\*-\*\*\*\* at \*\*:\*\*\*  
 Description : A Transfer, Loan or Loan Termination has been disapproved  
 Initiated By : (Originating Department Preparer's Name)  
  
 Please logon to ALLN01 to correct this EIMR at your earliest convenience.

The “From” Department Approver cannot modify the EIMR. The Approver must contact his or her Preparer with instructions on how to modify the EIMR. Property numbers may need to be added, deleted or corrected. The entire EIMR may need to be purged.

## F. PRINTING AN INTERDEPARTMENTAL TRANSFER EIMR REPORT

Follow the same procedure as outlined under Chapter IV.F.

A **Transfer/Loan/Loan Termination EIMR Report** closely resembles a Disposal EIMR Report, with several modifications related to the fact that two departments are involved:

1. Both "From" and "To" Department IDs and Names appear at the top of the document.
2. The Custody Codes for both Departments appear next to each asset, recording the original and new custodies.
3. A "signature block" is added for the "To" Department.

VMBOY ASEQP176 ASEQR176	UNIVERSITY OF CALIFORNIA, SANTA BARBARA EQUIPMENT INVENTORY MODIFICATION REQUEST TRANSFER/LOAN/LOAN TERMINATION EIMR NUMBER 117239	PAGE 1 05/17/02 12:48:55			
FROM DEPT ID: PURC TO DEPT ID: ACTG TRANS CODE: 23	FROM DEPT NAME: PURCHASING OFFICE TO DEPT NAME: ACCOUNTING & FINANCIAL SERVICES TRANS DESCRIPTION: INTERDEPARTMENTAL TRANSFER	STATUS: TRANSFERRED			
ASSET NBR	DESCRIPTION	VALUE	NON-UC TITLE	FROM CUSTODY CODE	TO CUSTODY CODE
968000824	PRINTER-LASER	2,052.00		8 0403 00	8 0871 00
PREPARER ID/DATE VMBOY 05-17-2002	- Boyle, Vaughn M. 10:04 Ph: 893-7377 DIRECTORS	PREPARER REMARKS INTERDEPARTMENTAL TRANSFER OF LASER PRINTER, PER AGREEMENT BETWEEN			
FROM APPROVER ID/DATE VMBOY 05-17-2002	- Boyle, Vaughn M. 11:30	FROM APPROVER REMARKS THIS IS THE PRINTER DISCUSSED AT YESTERDAY'S MEETING			
TO APPROVER ID/DATE VMBOY 05-17-2002	- Boyle, Vaughn M. 12:10	TO APPROVER REMARKS			
TRANSFERRER ID/DATE VMBOY 05-17-2002	- Boyle, Vaughn M. 12:48				

## G. INTERDEPARTMENTAL LOANS

*Equipment Inventory Modification Requests for Interdepartmental Loans should be prepared only if the loan period is for six months or more. Shorter term loans should be recorded and tracked internally by the Loaning Department, but not submitted to Equipment Management.*

Essentially, the procedures for preparing and approving Interdepartmental Loans are the same as those for Interdepartmental Transfers.

### 1. On the **EIMR Prepare Transfer/Loan/Loan Termination Screen**,

- a. In the **Action Code** field, enter **A**.
- b. In the **Transaction Code** field, enter transaction code **96**.
- c. Enter the Preparer's **Telephone Number** (optional).
- d. Enter information pertaining to the department to which the equipment is being loaned – usually it must be obtained from “To” Department.
  - i. **Custodial Code** – Mandatory. Enter the “To” Department's custody code.
  - ii. **Building Number** – Mandatory. Enter the number of the building in which the asset(s) will be located.

*If the equipment is not changing physical location, just custody, the old (current) building number must be re-entered.*
  - iii. **Room Number** – Optional. The EIMR can be processed without it, but this information is recommended for equipment tracking.
  - iv. **User** – Optional. The EIMR can be processed without it, but it is recommended that this information be added.
- e. Enter any **Remarks** (optional, but helpful to both the “To” Department and Equipment Management in processing the EIMR. If back-up documentation is being mailed to Equipment Management, it should be noted).
- f. Enter the **Asset (Property) Number(s)** of the asset(s) being loaned.
- g. Hit ENTER.

2. The message – **Transfer EIMR added successfully** – appears.

<b>Transfer EIMR added successfully</b>		
03/27/10	***** Equipment Inventory Modification Request *****	ASEQP172
VMBOY	- Prepare Transfer/Loan/Loan Termination -	ALLN01
*Action: (A,B,C,D,M,P)    EIMR: 122198    Dept: PURC    Status: PREPARED		
*Trans Code: 96    Preparer: Boyle,Vaughn M.    Phone:		
To Dept: BUSS    Custody Code: 8 0110 00    Bldg: 568    Room:    User:		
Remarks: COPIER LOAN TO BUSINESS SERVICES		
-----		
Jump to Line Nbr: 01	Prepared: 03-27-2010	Non-UC
Asset Nbr Description	Title	Value
01 018002354 COPIER/PRINTER-DIGITAL		7,740.00
02 _____		
03 _____		
From Approval:	Approver:	Date:
Remarks:		
To Approval:	Approver:	Date:
Remarks:		
Tsfr to CATS:	Transferrer:	Date:

Information is automatically entered: the next available **EIMR Number**, the **Department** and **Preparer**. The **Status** of the EIMR appears as **PREPARED**.

The property numbers of the assets have been sorted from lowest to highest, if not originally entered sequentially.

The EIMR has been sent to the “From” Department Approver for action. Approvals by both the “From” and “To” Departments, and by Equipment Management, follow the same pathway as outlined earlier for Interdepartmental Transfers.

\*\*\*\*\*

### “ON-LOAN” ASSETS – SPECIAL CONDITIONS

Once an Interdepartmental Loan is processed, the asset remains under “on loan” status until an Interdepartmental Loan Termination EIMR is processed.

While an asset is under “on loan” status, it may NOT be (1) loaned to a second department, (2) transferred permanently to another department, or (3) disposed. The loan must be terminated before any of these transactions may be performed.

Transactions involving the loaned asset(s) may be performed only by the “From” (Original) Department, which retains official custody of the asset(s) throughout the loan period. Even if the “To” Department wishes only to record a room change via Online CATS during the loan period, it must contact the “From” Department and request that it enter the data modification.

## H. INTERDEPARTMENTAL LOAN TERMINATIONS

The “To” Department notifies the “From” Department when it has returned the loaned asset(s). Once the Preparer in the “From” Department has verified the physical return of the loaned assets, the Preparer initiates a Loan Termination EIMR:

1. On the **EIMR Prepare Transfer/Loan/Loan Termination Screen**,
  - a. In the **Action Code** field, enter **A**.
  - b. In the **Transaction Code** field, enter transaction code **11**.

*This transaction code can only be used when an asset is under “on loan” status and has a previous transaction code 96. If Transaction Code 11 is entered for any other asset, an error message – “**terminating loan ‘11’ must have last trans ‘96’**” – is displayed and the transaction is blocked.*

```

Terminating loan '11' must have last trans '96'
05/19/02 ***** Equipment Inventory Modification Request ***** ASEQP172
UMBOY - Prepare Transfer/Loan/Loan Termination - ALLND

*Action: (A,B,C,D,M,P) A EIMR: 117244 Dept: Status:
*Trans Code: 11 Preparer: Phone: 8937377
To Dept: Custodial Code: Bldg: 927 Room: 1101 User: UB
Remarks: TERMINATING INTERDEPARTMENTAL LOAN OF COMPUTER; ASSET RETURNED BY
ACCOUNTING ON MAY 17, 2002
Jump to Line Nbr: 01 Prepared: Non-UC
Asset Nbr Description Title Value
01 958008927 MICROCOMPUTER,80MHZ,8MB RAM,700MB HD,CDROM 4,950.70
02
03

From Approval: Approver: Date:
Remarks:
To Approval: Approver: Date:
Remarks:

Tsfr to CATS: Transferrer: Date:
  
```

- c. Enter the Preparer’s **Telephone Number** (optional).
- d. Do NOT enter a Custody Code: when a Loan Termination is processed, the original Custody Code is automatically restored. If a Custody Code is entered, an error message – **Custodial code not allowed for other than trans code 90 or 96** – is displayed and the transaction is blocked.

```

Custodial Code not allowed for other than trans code 90 or 96
05/19/02 ***** Equipment Inventory Modification Request ***** ASEQP172
UMBOY - Prepare Transfer/Loan/Loan Termination - ALLND

*Action: (A,B,C,D,M,P) A EIMR: 117247 Dept: Status:
*Trans Code: 11 Preparer: Phone: 8937377
To Dept: Custodial Code: 8 0403 00 Bldg: 927 Room: 1101 User: UB
Remarks: TERMINATING INTERDEPARTMENTAL LOAN; FAX MACHINE RETURNED TO PURCHASING
BY ACCOUNTING ON MAY 17, 2002
Jump to Line Nbr: 01 Prepared: Non-UC
Asset Nbr Description Title Value
01 018001015
02
03

From Approval: Approver: Date:
Remarks:
To Approval: Approver: Date:
Remarks:

Tsfr to CATS: Transferrer: Date:
  
```

- e. **Building Number** (must be re-entered, even if the asset is returned to its original location).
  - f. **Room Number, User Code and Remarks** (all optional).
  - g. Hit ENTER.
2. The message – **Transfer EIMR successfully added** – appears.

```

Transfer EIMR added successfully
05/19/02      ***** Equipment Inventory Modification Request *****      ASEQP172
UMBOY        - Prepare Transfer/Loan/Loan Termination -                      ALLND

*Action: (A,B,C,D,M,P)      _ EIMR: 117248 Dept: PURC Status: PREPARED
*Trans Code: 11      Preparer: Boyle,Vaughn M.      Phone: 8937377
To Dept:      Custodial Code:      Bldg: 927 Room: 1101 User: UB
Remarks: TERMINATE INTERDEPARTMENTAL LOAN OF FAX MACHINE; RETURNED TO
PURCHASING BY ACCOUNTING ON MAY 17, 2002
Jump to Line Nbr: 01      Prepared: 05-19-2002      Non-UC
Asset Nbr Description      Title      Value
01 018001015 FACSIMILE MACHINE,600DPI PRINTING,400DPI SCANNING      1,607.00
02
03

From Approval:  Approver:      Date:
Remarks:
To Approval:  Approver:      Date:
Remarks:

Tsfr to CATS:  Transferrer:      Date:
Direct Command:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
confm help retrn quit      print      bkwrd frwrd      cust      main

```

Information is automatically entered into certain fields: the next available **EIMR Number, Department and Preparer**. The **Status** now appears as **PREPARED**.

The Loan Termination EIMR is sent to the “From” Department Approver for action.

Once approved by the “From” Department, the EIMR is automatically routed to Equipment Management. No “To” Department approval is required: the borrowed asset(s) have been returned and, by contacting the “From” Department and notifying it of such, the “To” Department has already indicated its approval.

## I. OFF-CAMPUS LOANS

*Equipment Inventory Modification Requests for Off-Campus Loans should be prepared only if the loan period is for one year or more. Shorter term loans should be recorded and tracked internally by the Loaning Department, but not submitted to Equipment Management.*

Essentially, the procedures for preparing and approving Off-Campus Loans are the same as those for Interdepartmental Loans.

### 1. On the **EIMR Prepare Transfer/Loan/Loan Termination Screen**,

- a. In the **Action Code** field, enter **A**.
- b. In the **Transaction Code** field, enter transaction code **95**.

*This transaction code is used in two different situations:*

- (i) *the off-campus use of an asset by a University employee (either at home or a remote research location)*
  - (ii) *the loan of an asset to a non-University individual or agency.*
- c. Enter the Preparer's **Telephone Number** (optional).
  - d. Do NOT enter a Custody Code. University employees, non-University individuals or agencies do not have UC Custody Codes, therefore the "From" Department's Custody Code continues to be used. If a Custody Code is entered, an error message – **Custodial code not allowed for other than trans code 90 or 96** – is displayed and the transaction is blocked.

<b>Custodial Code not allowed for other than trans code 90 or 96</b>			
05/19/82	***** Equipment Inventory Modification Request *****	ASEQP172	
UMBOY	- Prepare Transfer/Loan/Loan Termination -	ALLND	
*Action: (A,B,C,D,M,P)	A EIMR: 117251 Dept:	Status:	
*Trans Code: 95	Preparer:	Phone: 8937377	
To Dept:	Custodial Code: 8 0403 00	Bldg: 927 Room: 1103	User: UB
Remarks: OFF-CAMPUS USE OF COMPUTER BY VAUGHN BOYLE TO CONDUCT BUSINESS AT HIS RESIDENCE			
Jump to Line Nbr: 01	Prepared:	Non-UC Title	Value
01 998002820			
02			
03			
From Approval:	Approver:	Date:	
Remarks:			
To Approval:	Approver:	Date:	
Remarks:			
Tsfr to CATS:	Transferrer:	Date:	

- e. **Building Number** (a UCSB building number must be entered: use that of the asset's original location, before it was moved off-campus).
- f. **Room Number** (optional; if a University employee is using an asset at home or abroad, enter his or her campus office number).

- g. **User Code** (optional; if the borrower is a University employee, his or her User Code should be entered).
- h. **Remarks** (mandatory: the identity of the borrower and the physical off-campus location of the asset(s) **MUST** be provided).
- i. **Asset (Property) Number(s)** of the asset(s) which are being loaned.
- j. Once all of the information has been checked and verified, hit ENTER.

2. The message – **Transfer EIMR added successfully** – appears.

Transfer EIMR added successfully			
03/27/10	*****	Equipment Inventory Modification Request *****	ASEQP172
VMBOY	-	Prepare Transfer/Loan/Loan Termination -	ALLN01
*Action: (A,B,C,D,M,P)      _ EIMR: 122199 Dept: PURC Status: PREPARED			
*Trans Code: 95      Preparer: Boyle, Vaughn M.      Phone: _____			
To Dept:      Custody Code: _ _ _ _ _ Bldg: 568_ Room: _____ User: _____			
Remarks: COPIER LOAN TO ISLA VISTA SCHOOL_____			
-----			
Jump to Line Nbr: 01	Prepared: 03-27-2010	Non-UC	
Asset Nbr	Description	Title	Value
01	018002354	COPIER/PRINTER-DIGITAL	7,740.00
02	_____		
03	_____		
From Approval:	Approver:		Date:
Remarks:			
To Approval:	Approver:		Date:
Remarks:			
Tsfr to CATS:	Transferrer:		Date:

Information is automatically entered: the next available **EIMR Number**, the **Department** and **Preparer**. The **Status** of the EIMR appears as **PREPARED**.

The EIMR has been sent to the Department Approver for action. Once approved, it is routed to Equipment Management.

\*\*\*\*\*

### “ON-LOAN” ASSETS – SPECIAL CONDITIONS

Once an Off-Campus Loan is processed, the asset remains under “on loan” status until an Off-Campus Loan Termination EIMR is processed.

While an asset is under “on loan” status, it may NOT be (1) loaned to a second department, (2) transferred permanently to another department, or (3) disposed. The loan must be terminated before any of these transactions may be performed.

## J. OFF-CAMPUS LOAN TERMINATIONS

Once the Preparer has verified the physical return of the loaned assets, he or she initiates a Loan Termination EIMR:

1. On the **EIMR Prepare Transfer/Loan/Loan Termination Screen**,
  - a. In the **Action Code** field, enter **A**.
  - b. In the **Transaction Code** field, enter transaction code **10**.

*This transaction code can only be used when an asset is under “on loan” status and has a previous transaction code 95 in place. If Transaction Code 11 is entered for any other asset, an error message – “**terminating loan ‘10’ must have last trans ‘95’**” – is displayed and the transaction is blocked.*

Terminating loan '10' must have last trans '95'			
05/19/02	***** Equipment Inventory Modification Request *****	ASEQP172	
UMBOY	- Prepare Transfer/Loan/Loan Termination -	ALLND	
*Action: (A,B,C,D,M,P)	A EIMR: 117252	Dept:	Status:
*Trans Code: 10	Preparer:	Phone: 8937377	
To Dept:	Custodial Code: _____	Bldg: 927	Room: 1103
Remarks: TERMINATING OFF-CAMPUS LOAN OF COMPUTER; RETURNED TO OFFICE ON MAY 17, 2002.		User: UB	
Jump to Line Nbr: 01	Prepared:	Non-UC	
Asset Nbr Description		Title	Value
01 998002818 MICROCOMPUTER, 128MBRAM, 10GBHD, 450MHZ, 17/40CDROM, 1			1,761.00
02 _____			
03 _____			
From Approval:	Approver:	Date:	
Remarks:			
To Approval:	Approver:	Date:	
Remarks:			
Trsf to CATS:	Transferrer:	Date:	

- c. Enter the Preparer’s **Telephone Number** (optional).
- d. Do NOT enter a Custody Code: when a Loan Termination is processed, the original Custody Code is automatically restored. If a Custody Code is entered, an error message – **Custodial code not allowed for other than trans code 90 or 96** – is displayed and the transaction is blocked.
- e. **Building Number** (must be entered, even if the asset does not change locations).
- f. **Room Number, User Code and Remarks** (all optional).
- g. Hit ENTER.

2. The message – **Transfer EIMR successfully added** – appears.

```
Transfer EIMR added successfully
03/27/10 ***** Equipment Inventory Modification Request ***** ASEQP172
VMBOY - Prepare Transfer/Loan/Loan Termination - ALLN01

*Action: (A,B,C,D,M,P) _ EIMR: 122200 Dept: PURC Status: PREPARED
*Trans Code: 10 Preparer: Boyle,Vaughn M. Phone:
To Dept: Custody Code: _ _ _ _ _ Bldg: 568_ Room: _ _ _ User: _
Remarks: TERMINATE TEST LOAN

Jump to Line Nbr: 01 Prepared: 03-27-2010 Non-UC
Asset Nbr Description Title Value
01 018002354 COPIER/PRINTER-DIGITAL 7,740.00
02 _____
03 _____

From Approval: Approver: Date:
Remarks:
To Approval: Approver: Date:
Remarks:

Tsfr to CATS: Transferrer: Date:
```

Information is automatically entered: **EIMR Number**, **Department** and **Preparer**.  
The **Status** appears as **PREPARED**.

The Loan Termination EIMR is sent to the Department Approver for action. Once approved, the EIMR is automatically routed to Equipment Management.

## K. INTERCAMPUS LOANS

*Equipment Inventory Modification Requests for Intercampus Loans should be prepared only if the loan period is for one year or more. Shorter term loans should be recorded and tracked internally by the Loaning Department, but not submitted to Equipment Management.*

Essentially, the procedures for preparing and approving Intercampus Loans are the same as those for Off-Campus Loans.

1. On the **EIMR Prepare Transfer/Loan/Loan Termination Screen**,
  - a. In the **Action Code** field, enter **A**.
  - b. In the **Transaction Code** field, enter transaction code **97**.
  - c. Enter the Preparer's **Telephone Number** (optional).
  - d. Do NOT enter a Custody Code. While the borrowing department at the other UC campus has a Custody Code, CATS can only accept UCSB Custody Codes: the original Custody Code does not change. If a Custody Code is entered, an error message – **Custodial code not allowed for other than trans code 90 or 96** – is displayed and the transaction is blocked.
  - e. **Building Number** (the UCSB Building Number must be re-entered; CATS cannot accept building numbers from other UC campuses).
  - f. **Room Number** (optional; if a room number is entered, it must be the original UCSB Room Number).
  - g. **User Code** (optional).
  - h. **Remarks** (mandatory: the identity of the borrower, his or her department and the UC campus MUST be provided).
  - i. **Asset (Property) Number(s)** of the asset(s) being loaned.
  - j. Hit ENTER.

2. The message – **Transfer EIMR added successfully** – appears.

Transfer EIMR added successfully		
03/27/10	***** Equipment Inventory Modification Request *****	ASEQP172
VMBOY	- Prepare Transfer/Loan/Loan Termination -	ALLN01
*Action: (A,B,C,D,M,P)    EIMR: 122201 Dept: PURC Status: PREPARED		
*Trans Code: 97    Preparer: Boyle, Vaughn M.    Phone:		
To Dept:    Custody Code: _ _ _ _ Bldg: 568_ Room: _ _ _ _ User: _ _		
Remarks: LOAN TO UC IRVINE		
-----		
Jump to Line Nbr: 01	Prepared: 03-27-2010	Non-UC
Asset Nbr Description	Title	Value
01 018002354 COPIER/PRINTER-DIGITAL		7,740.00
02 _____		
03 _____		
From Approval:    Approver:		Date:
Remarks:		
To Approval:    Approver:		Date:
Remarks:		
Tsfr to CATS:    Transferrer:		Date:

Information is automatically entered: **EIMR Number, Department and Preparer.** The **Status** of the EIMR appears as **PREPARED.**

The EIMR has been sent to the Departmental Approver for action. Once approved, it is routed to Equipment Management.

As noted above, Intercampus Loans must be signed by the Equipment Manager at the borrowing campus. Given this requirement, once Equipment Management receives an Online Intercampus Loan EIMR, it will convert the data into a paper EIMR which will be sent to the borrowing campus. Only when this paper EIMR has been approved and returned to Santa Barbara will the Online transaction be processed and the Intercampus Loan recorded.

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### “ON-LOAN” ASSETS – SPECIAL CONDITIONS

Once an Intercampus Loan is processed, the asset remains under “on loan” status until an Intercampus Loan Termination EIMR is processed.

While an asset is under “on loan” status, it may NOT be (1) loaned to a second department, (2) transferred permanently to another department, or (3) disposed. The loan must be terminated before any of these transactions may be performed.

## L. INTERCAMPUS LOAN TERMINATIONS

Once the UCSB Department verifies that the equipment has been returned from the borrowing campus (a paper Loan Termination EIMR from the borrowing campus should accompany it), the UCSB Department initiates an Intercampus Loan Termination EIMR.

From this point forward, the procedures for preparing and approving Intercampus Loan Terminations are the same as those for Off-Campus Loan Terminations.

1. On the **EIMR Prepare Transfer/Loan/Loan Termination Screen**,

a. In the **Action Code** field, enter **A**.

b. In the **Transaction Code** field, enter transaction code **12**.

*This transaction code can only be used when an asset is under "on loan" status and has a previous transaction code 97 in place. If Transaction Code 12 is entered for an asset which is not under "on loan" status, an error message – "terminating loan '12' must have last trans '97'" – is displayed and the transaction is blocked.*

c. Enter the Preparer's **Telephone Number** (optional).

d. Do NOT enter a Custody Code. When a Loan Termination is processed, the original Custody Code is automatically restored. If a Custody Code is entered, an error message – **Custodial code not allowed for other than trans code 90 or 96** – is displayed and the transaction is blocked.

e. **Building Number** (must be re-entered, even if asset is returned to its original location).

f. **Room Number** and **User Code** (both optional).

g. **Remarks** (Alert Equipment Management to expect receipt, via intercampus mail, of a copy of the paper Intercampus Loan Termination EIMR sent by the borrowing campus. Equipment Management must sign and return it to the Equipment Manager at the borrowing campus.)

h. Hit ENTER.

2. The message – **Transfer EIMR successfully added** – appears.

<b>Transfer EIMR added successfully</b>		
03/27/10	***** Equipment Inventory Modification Request *****	ASEQP172
VMBOY	- Prepare Transfer/Loan/Loan Termination -	ALLN01
*Action: (A,B,C,D,M,P)    _ EIMR: 122202 Dept: PURC Status: PREPARED		
*Trans Code: 12    Preparer: Boyle, Vaughn M.    Phone:		
To Dept:    Custody Code: _ _ _ _ _ Bldg: 568_ Room: _ _ _ _ _ User: _ _		
Remarks: TERMINATE TEST LOAN TO UCI		
-----		
Jump to Line Nbr: 01	Prepared: 03-27-2010	Non-UC
Asset Nbr Description	Title	Value
01 018002354 COPIER/PRINTER-DIGITAL		7,740.00
02 _____		
03 _____		
From Approval:    Approver:		Date:
Remarks:		
To Approval:    Approver:		Date:
Remarks:		
Tsfr to CATS:    Transferrer:		Date:

Information is automatically entered: **EIMR Number, Department and Preparer.**  
The **Status** appears as **PREPARED.**

The Intercampus Loan Termination EIMR is sent to the Department Approver for action. Once approved, the EIMR is automatically routed to Equipment Management.