

Instructions for Completing the **Addition to Fixed Asset Inventory** Form

It is the responsibility of the Departmental Inventory Clerk to insure and maintain an accurate inventory of equipment for the department.

Departmental Inventory Clerks must complete the Addition to Fixed Assets Inventory form found at <http://solomon.longwood.edu/finance/fixed-assets/> for equipment additions, if the equipment meets one of the following conditions.

1. Technology items in which theft or loss of such items would represent a significant risk to the University (including, but not limited to, computers, netbooks, iPads, iPods, Kindles, iPhones or other mobile technology)
2. Equipment purchased with Equipment Trust Fund monies.
3. Equipment not covered in 1 or 2 with a cost (including freight) of \$5,000 or greater.

NOTE: On Dell equipment the serial number that Longwood uses is called a Service Tag.

Fixed Assets will perform a monthly analysis of Equipment expense accounts for the above criteria. The appropriate departmental inventory clerk and their respective Department Chair or Vice President will be notified via email if items are found through this analysis without supporting forms.

Instructions:

1. Open your web browser and go to <http://solomon.longwood.edu/finance/fixed-assets/> and select the **Addition to Fixed Asset Inventory** link under Forms on the main page. This link will open to a PDF form in a separate window. (If you have a pop-up blocker you will need to disable the blocker on this page)
2. You must complete all blocks in RED. In addition you must select one of the five options under Action. Also, you must select one of the following three options from: eVa purchase; Point of sale; Foundation funds.

http://www.longwood.edu/budget/Addition_Fixed_Assets.pdf - Windows Internet Explorer

http://www.longwood.edu/budget/Addition_Fixed_Assets.pdf

Please fill out the following form. When finished, click Submit Form to return the completed form.

Addition to Fixed Assets Inventory

The following item of equipment is University owned and should be added to the fixed assets inventory. Supporting documentation must be attached to verify the purchase price (or appraised value if the purchase price is not known), packing slip, the acquisition date, the location of the asset, and the method of acquisition (e.g. donation, fabrication, transfer from another University, credit card) If purchase is an Apple computer also make a photocopy of the Serial # on the box). Please complete the * required fields. Print or save a copy of the document for your files.

Action*: (YOU MUST SELECT ONE OF THE ITEMS BELOW)

☐ Donation(gift) ☐ Transferred from another University (Agency)

☐ Fabricated ☐ Found

- Once the form is completed click on the Submit button in the upper right corner.

The Send Form box will appear.

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Action*: (YOU MUST SELECT ONE OF THE ITEMS BELOW)

☒ Donation(gift) ☐ Transferred from another University (Agency)

☐ Fabricated ☐ Found

☐ Purchased

Banner Index/Account # **test**

Item Description*: **test**

Manufacturer*: **test**

Model Number*: **test** Date Received*: **test**

Serial Number*: **test**

Send Form

To: hastingsj@longwood.edu
 Subject: Submitting Completed Form
 Attachment: Addition_Fixed_Assets.pdf

From:
 Email Address:
 Full Name:
☐ Remember me

To save your email address and name in Acrobat's Identity preferences, check Remember me. Do not check this box if you are using a public computer.

Send Cancel

- In the Email Address field type your Longwood University email address.
- In the Full Name field type your name.
- Select the send button.

The Select Email Client box will appear.

The screenshot shows a web browser window displaying a form titled "Addition_Fixed_Assets.pdf". The form is for adding fixed assets and includes fields for "Banner Index/Account Charged", "PO/PCO #", "Item Description", "Manufacturer", "Model Number", "Serial Number", "Cost (including freight)", and "Date Received". A "Select Email Client" dialog box is open, asking the user to choose between "Desktop Email Application" and "Internet Email". The "Desktop Email Application" option is selected. The form also includes checkboxes for "Donation(gift)", "Fabricated", and "Purchased", and a "Submit Form" button.

http://www.longwood.edu/budget/Addition_Fixed_Assets.pdf - Windows Internet Explorer

http://www.longwood.edu/budget/Addition_Fixed_Assets.pdf

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http://www.longwood.edu/budget/Addition_Fixed_As...

1 / 1 130% Collaborate Sign Comment Find

Please fill out the following form. When finished, click Submit Form to return the completed form. Highlight Fields Submit Form

☒ Donation(gift) ☐ Transferred from another University (Agency)

☐ Fabricated

☐ Purchased

Banner Index/Account Charged *

PO/PCO # test

Item Description*: test

Manufacturer*: test Cost (including freight)*: \$0.00

Model Number*: test Date Received*: test

Serial Number*: test

Foundation Funds

IF PURCHASED)

Select Email Client

Please indicate the option which best describes how you send mail.

☒ Desktop Email Application

Choose this option if you currently use an email application such as Microsoft Outlook Express, Microsoft Outlook, Eudora, or Mail.

☐ Internet Email

Choose this option if you currently use an Internet email service such as Yahoo or Microsoft Hotmail. You will then need to save your form and return it manually to hastingsj@longwood.edu using your Internet email service.

☐ Don't show again

OK Cancel

7. Select the Desktop Email Application toggle box.

8. Select the Ok button.

The Outgoing Message Notification box will appear.

The screenshot shows the same web form as before, but now with an "Outgoing Message Notification" dialog box open. The dialog box informs the user that an email message with the form attached has been sent to their default email application. It also includes a "Don't show again" checkbox and an "OK" button. The form fields and other elements remain the same.

http://www.longwood.edu/budget/Addition_Fixed_Assets.pdf - Windows Internet Explorer

http://www.longwood.edu/budget/Addition_Fixed_Assets.pdf

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1 / 1 130% Collaborate Sign Comment Find

Please fill out the following form. When finished, click Submit Form to return the completed form. Highlight Fields Submit Form

☒ Donation(gift) ☐ Transferred from another University (Agency)

☐ Fabricated

☐ Purchased

Banner Index/Account Charge

PO/PCO # test

Item Description*: test

Manufacturer*: test Cost (including freight)*: \$0.00

Model Number*: test Date Received*: test

Serial Number*: test

Foundation Funds

(YOU MUST SELECT ONE OF THE ABOVE ITEMS IF PURCHASED)

Outgoing Message Notification

An email message with "Addition_Fixed_Assets.pdf" attached has been given to your default email application. If your email application is configured to send email automatically on a schedule, the email will be sent automatically.

If not, you will need to send the message manually.

☐ Don't show again

OK

9. Select the Ok button.

Once you select Ok, the email will be placed in your Outlook Outgoing Mailbox to be sent to Fixed Assets.

After the item is sent you can go into your sent items folder in Outlook and locate the email which will have a copy of the form in the attachment box. You should open the file and either save a copy electronically or print a copy for your records.