

PROPERTY INVENTORY MANAGEMENT APPLICATION (PIMA) USER'S MANUAL

Versión en Español esta debajo.

In accordance with the Cooperative Agreements between AURA and NSF, a record of all Capital Property (assets over \$5000) must be maintained. PIMA is the application that AURA utilizes to accomplish this requirement.

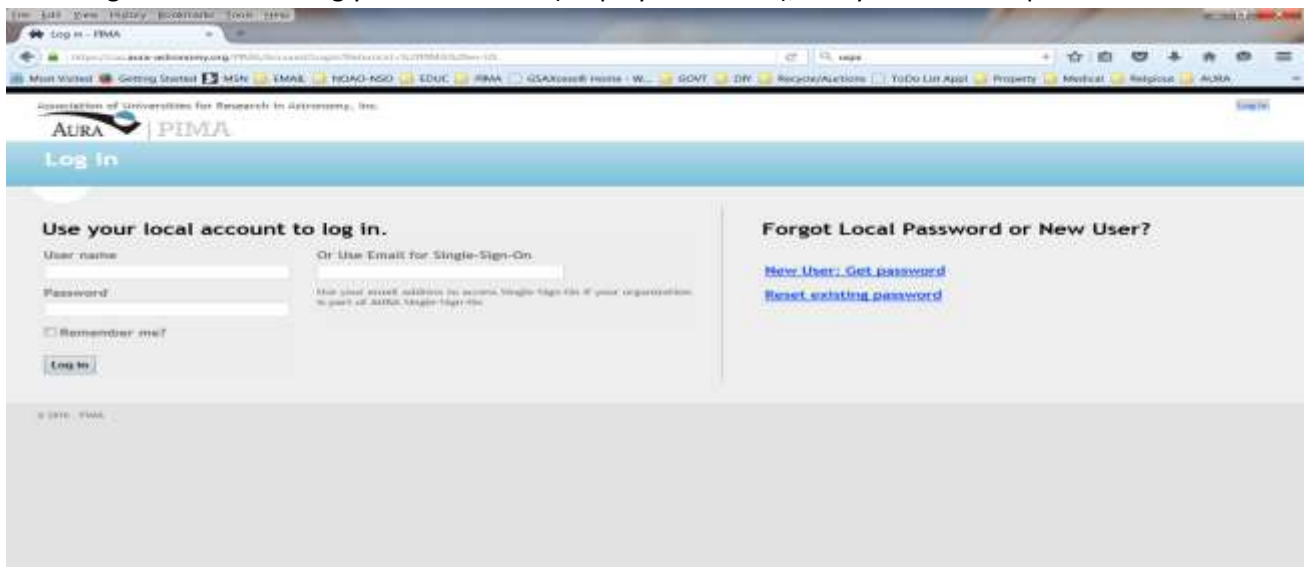
All assets procured over the \$5000 threshold must be recorded, tracked, inventoried and disposed of to satisfy this requirement.

Using PIMA, you can access the purchasing documentation for any asset, including purchase requisition, purchase order, packing slips, invoices, purchasing and financial history.

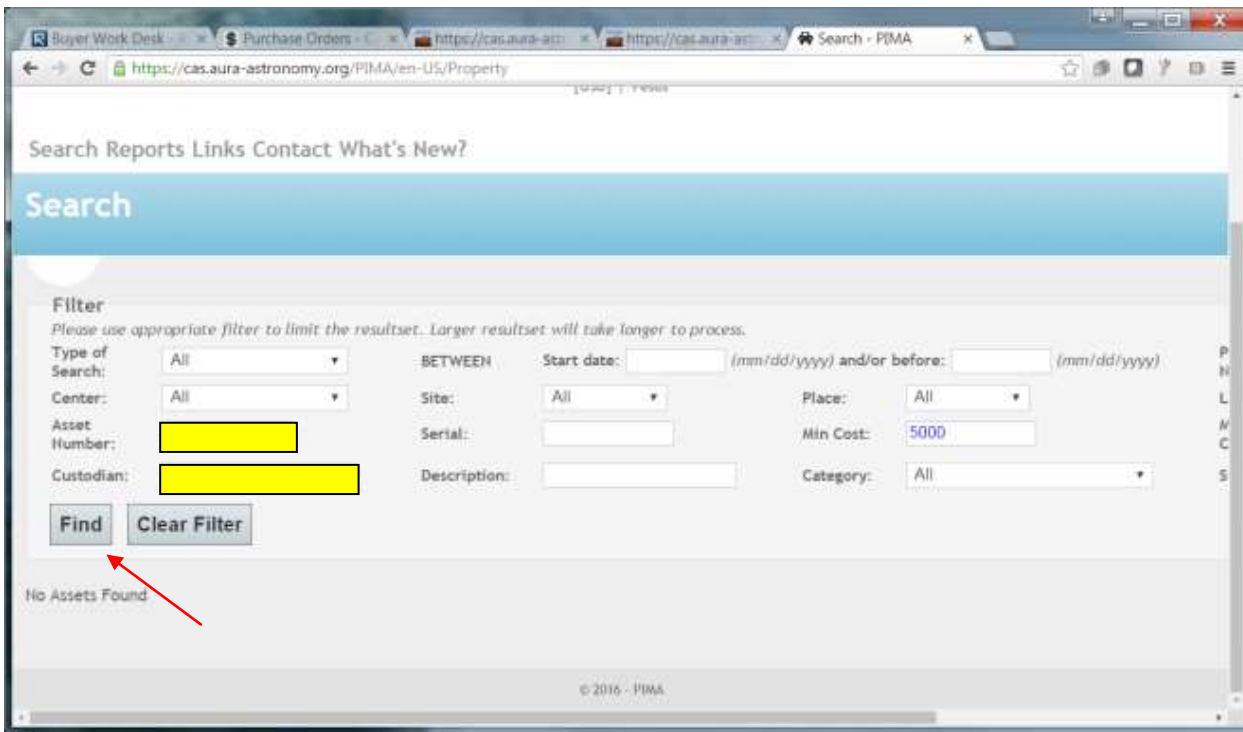
Access PIMA through the link below

<https://cas.aura-astronomy.org/PIMA>

Log into PIMA utilizing your User Name (employee number), and your REQLESS password.



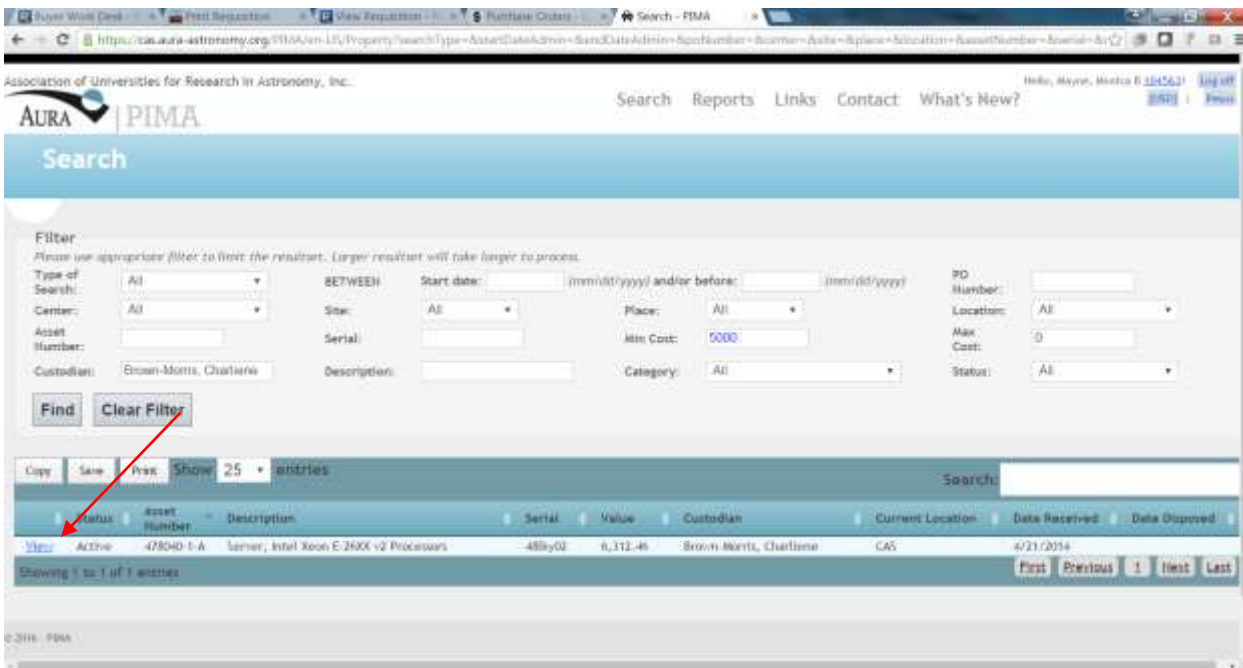
Once logged in, you will be taken directly to the Search screen.

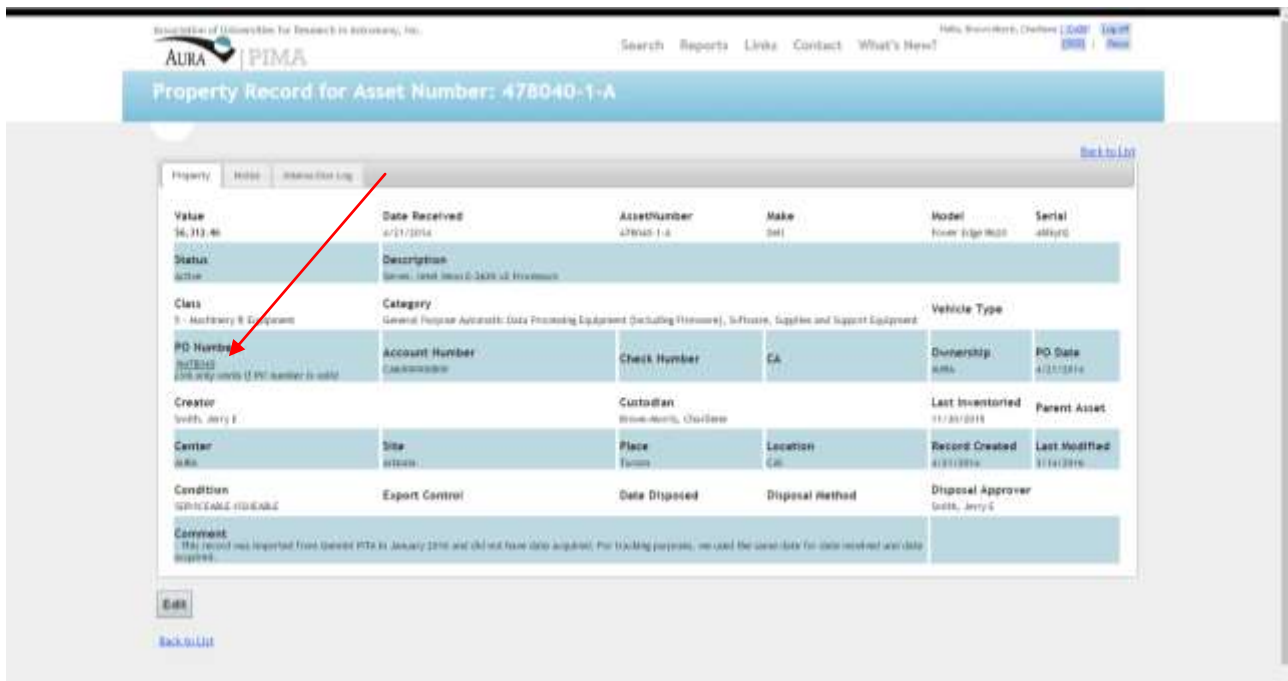


Enter the asset number into the Asset Number box and click Find.

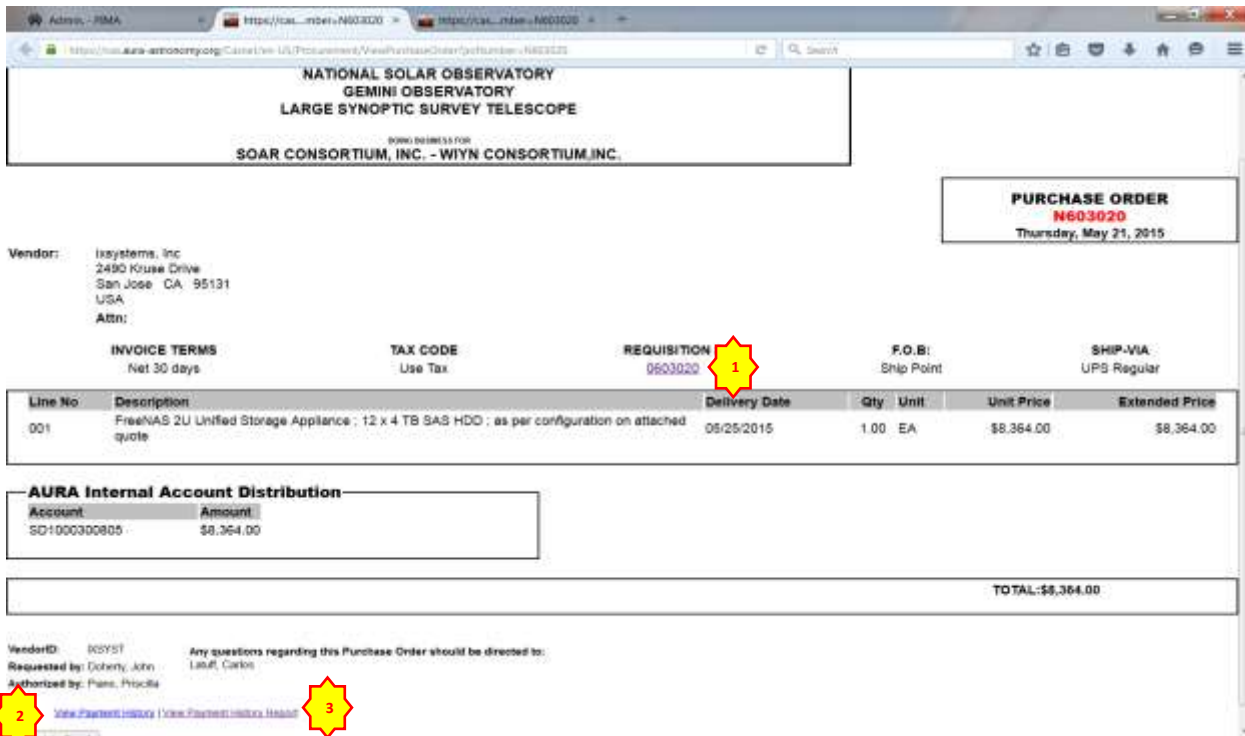
If you do not know the asset number, you may enter the custodian name into the Custodian box, beginning with their last name choose the appropriate custodian from the drop box and click Find for a list of all assets assigned to the particular custodian.

From the asset list, click the View option to the left of the asset to view the Property Record for the asset.





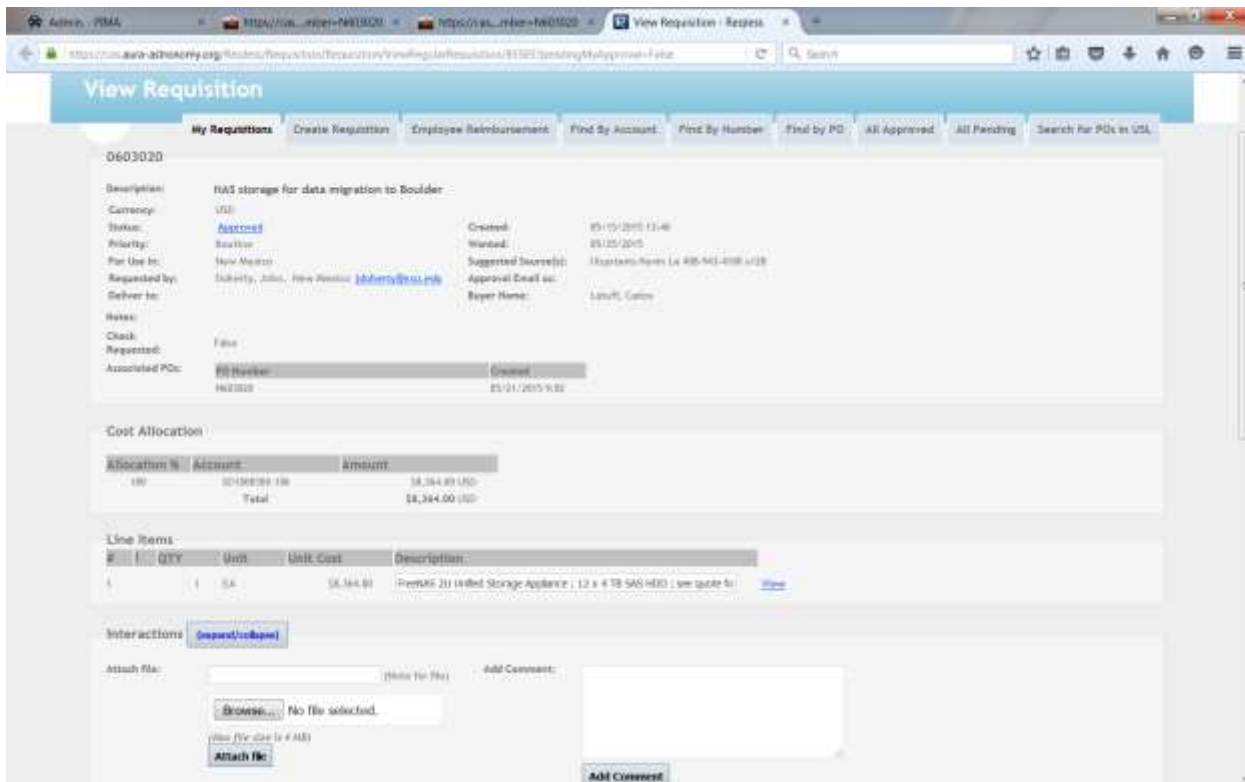
From the Property Record, clicking on the PO Number will direct you to an unofficial version of the Purchase Order in CASNET.



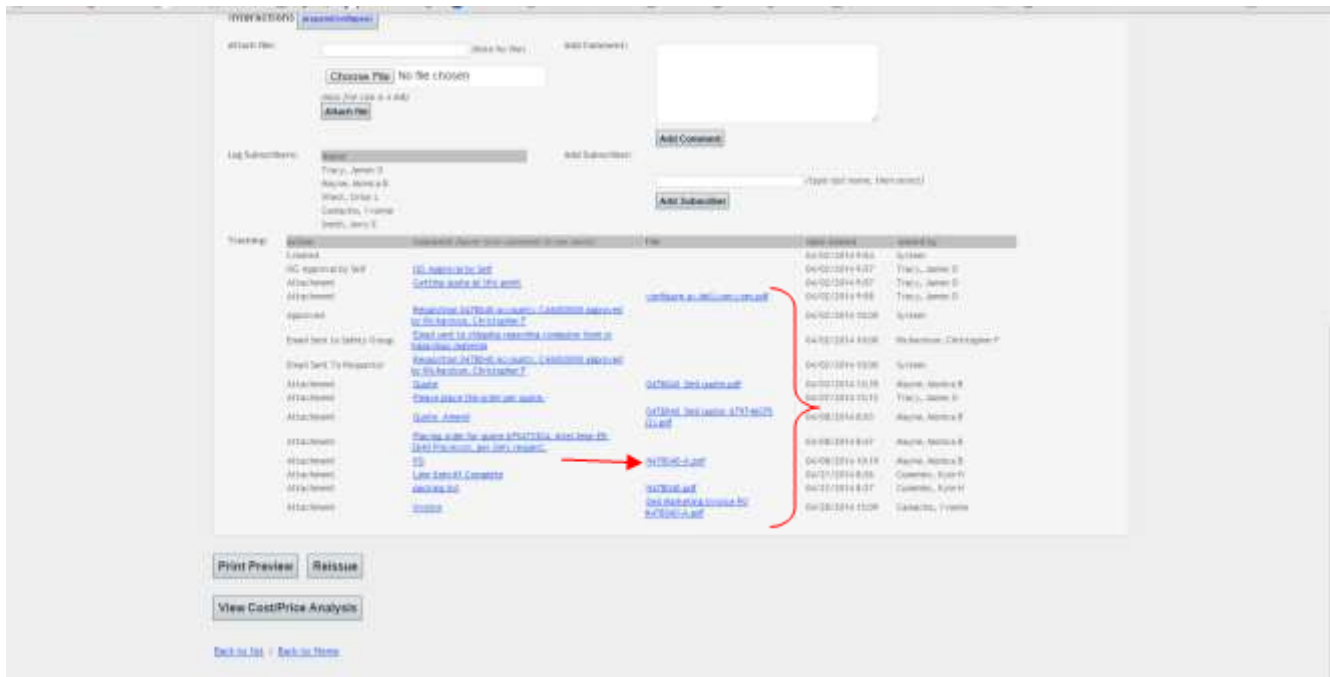
To access the Requisition, click on the requisition number ⁽¹⁾ highlighted in blue at the top of the PO.

From the purchase order, you may access a payment history for the asset by clicking the View Payment History link ⁽²⁾ at the bottom of the page.

Choosing View Payment History Report ⁽³⁾ will access the Purchase Order details.



Choosing the Requisition⁽¹⁾, you may view a copy of the Requisition in ReqLess.

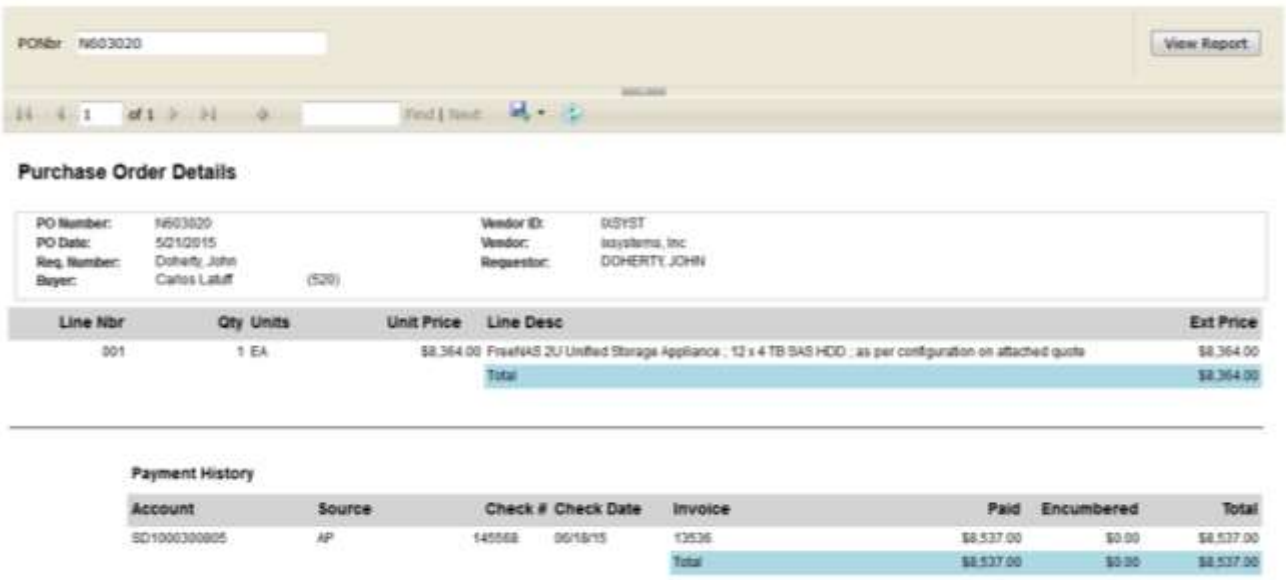


By clicking the links to the attachments at the bottom of the requisition, you may view any documentation pertaining to the asset, to include packing slips and invoices.

To view the official version of the Purchase Order choose the scanned copy from the attachments list.



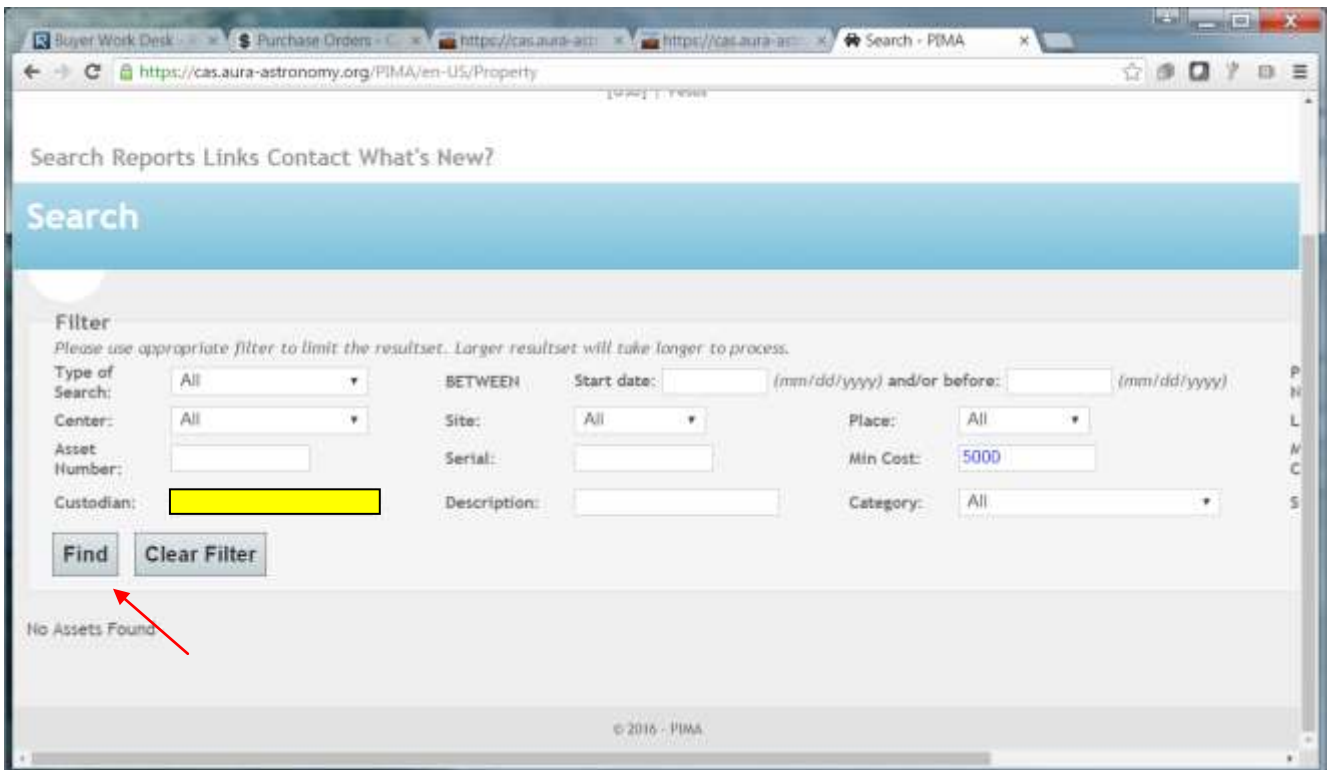
Choosing the Payment History link ⁽²⁾ displays the basic payment information of the Purchase Order for the asset in Casnet.



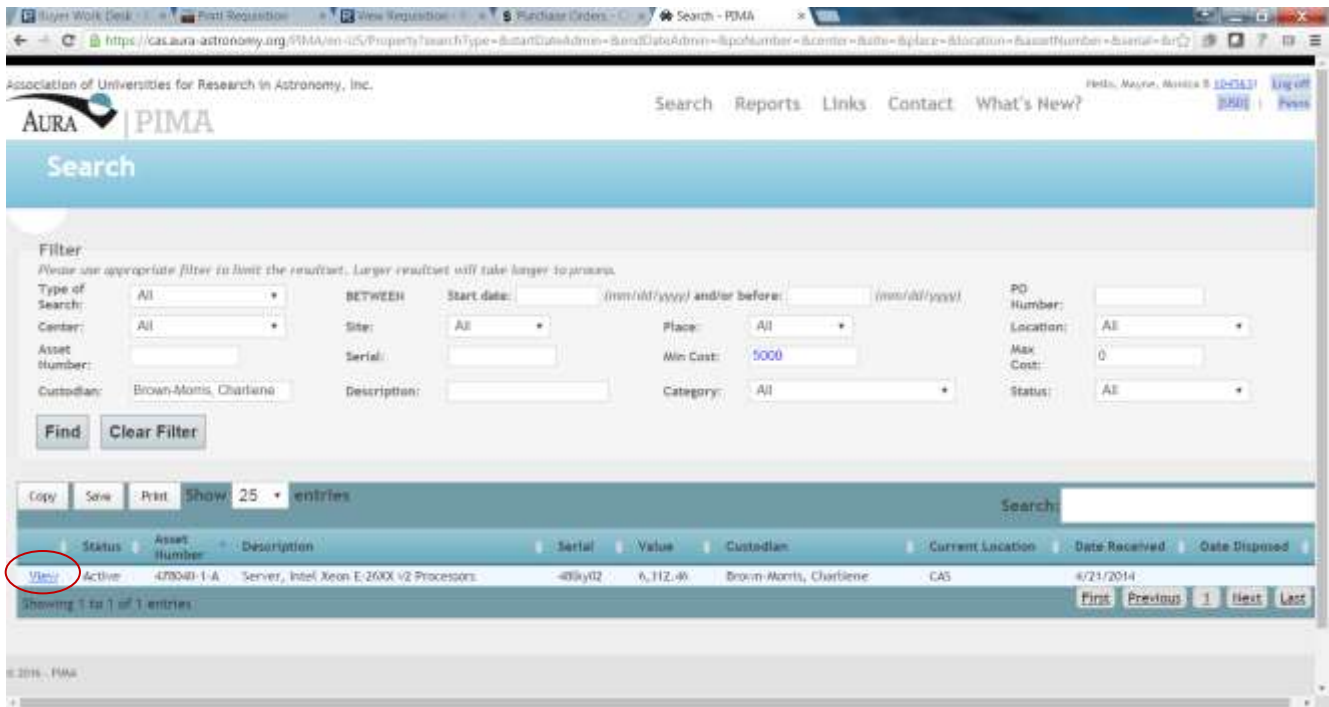
Choosing the View Payment History Report ⁽³⁾, displays a copy of the Purchase Order details including all the payment information.

Custodian Instructions for Updating PIMA Records

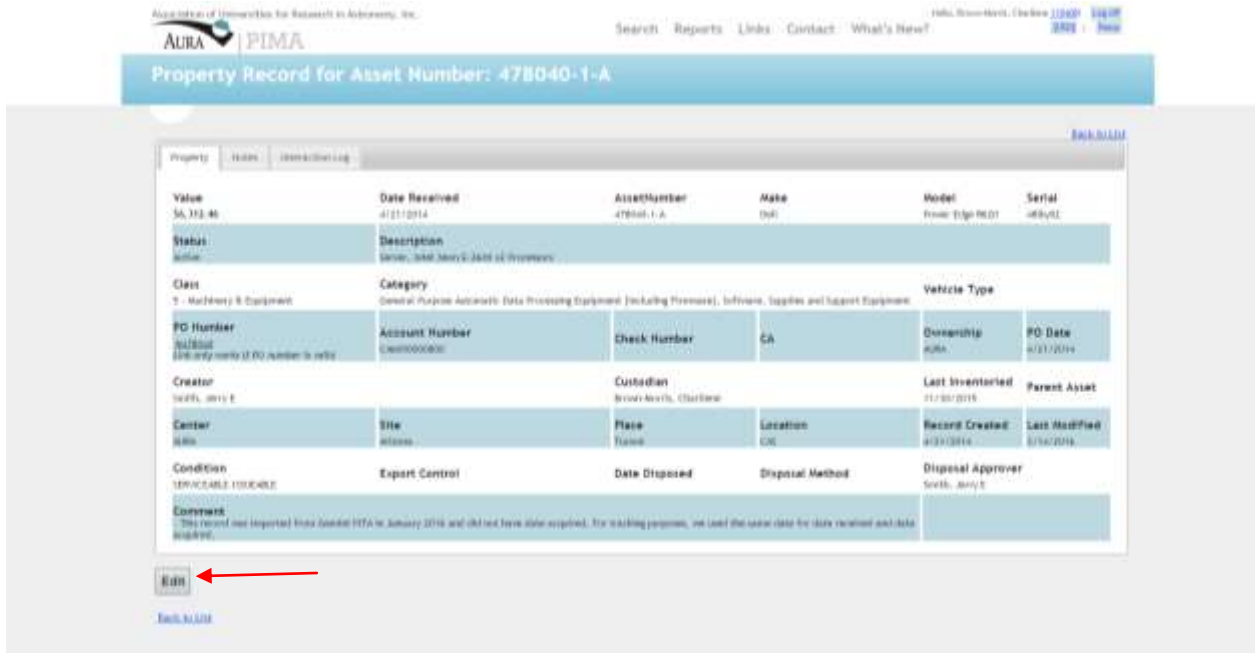
Not every employee is an assigned custodian of AURA assets. For those that are, it is the responsibility of each Custodian to keep the PIMA records up to date for each asset they are assigned. Below are the steps to update a record in PIMA.



Enter your last name into the Custodian cell and select the correct name from the drop down box. Then click Find.



From the list of assets, choose View.



As a custodian of AURA assets, you can edit selected fields, such as Custodian, Center, Site, Place, Location, and Comment. To edit the Property Record, click the Edit box at the bottom of the page.

Property Record for Asset Number: 478040-1-A

Value: \$6,113.44 | Date Received: 4/21/2014 | Asset Number: 478040-1-A | Make: Dell | Model: Power Edge R810 | Serial: d83u02

Status: Active | Description: Server, Intel Atom E 3804 v2 Processor

Class: E - Machinery & Equipment | Category: General Purpose Equipment: Data Processing Equipment (including Peripherals, Software, Supplies and Support Equipment) | Vehicle Type:

PO Number: 478040-1-A | Account Number: 478040-1-A | Check Number: | CA: | Ownership: 478040-1-A | PO Date: 4/21/2014

Creator: Smith, Jerry E | Custodian: Brown-Harris, Charlene | Last Invented: 4/21/2014 | Parent Asset:

Center: | Site: | Place: | Location: | Record Created: 4/21/2014 | Last Modified: 4/21/2014

Condition: SERVICEABLE-ISSUEABLE | Export Control: | Date Disposed: | Disposal Method: | Disposal Approver: Smith, Jerry E

Comment: This record was imported from Gemini PTA in January 2014 and did not have date acquired. For tracking purposes, we used the same date for date received and date acquired.

Buttons: Save, Request Disposal

To edit the information for these fields, choose from the options in the drop down boxes.

Specific physical location of an asset (e.g. “on the bottom shelf of the bookcase”) should be entered into the Comments box. The more specific you are, the more helpful it is during inventory.

Click Save when you have completed your changes or comments.

Property Record for Asset Number: 478040-1-A

Notes

Add Note:

Attach file to note:

Buttons: Save Note, Edit

Additional information on the asset can be entered at the Notes tab at the top of the Property Record. Click the Edit box to add any desired note, then click Save Note.

TRANSFERRING ASSETS TO ANOTHER CUSTODIAN

If you transfer the asset to a new custodian, you must change the record to reflect the new custodian.

Property Record for Asset Number: 478040-1-A

Value	Date Received	AssetNumber	Make	Model	Serial
\$6,712.46	4/21/2014	478040-1-A	Dell	Power Edge R610	483474
Status	Description				
Active	Dell, Dell Server 2000 of Processors				
Class	Category	Vehicle Type			
5 - Machinery & Equipment	General Purpose Automatic Data Processing Equipment (including Printers), Software, Supplies and Support Equipment				
PO Number	Account Number	Check Number	CA	Ownership	PO Date
012520	000000000			00%	4/21/2014
Creator	Custodian	Last Invented	Parent Asset		
Smith, Jerry E	Brown-Morris, Charles	11/30/2013			
Center	Site	Place	Location	Record Created	Last Modified
0000	00000000	Texas	TX	4/21/2014	5/16/2016
Condition	Expert Control	Date Disposed	Disposal Method	Disposal Approver	
UNREPAIRABLE/RELEASABLE				Smith, Jerry E	
Comment: This record was imported from General PITA in January 2016 and did not have date assigned. For tracking purposes, we used the same date for date received and date disposed.					

[Edit](#)

From the Property Record screen, select Edit.

Edit Property Record for Asset Number: 478040-1-A

Value	Date Received	AssetNumber	Make	Model	Serial
\$6,712.46	4/21/2014	478040-1-A	Dell	Power Edge R610	483474
Status	Description				
Active	Dell, Dell Server 2000 of Processors				
Class	Category	Vehicle Type			
5 - Machinery & Equipment	General Purpose Automatic Data Processing Equipment (including Printers), Software, Supplies and Support Equipment				
PO Number	Account Number	Check Number	CA	Ownership	PO Date
012520	000000000			00%	4/21/2014
Creator	Custodian	Last Invented	Parent Asset		
Smith, Jerry E	Brown-Morris, Charles	11/30/2013			
Center	Site	Place	Location	Record Created	Last Modified
0000	00000000	Texas	TX	4/21/2014	5/16/2016
Condition	Expert Control	Date Disposed	Disposal Method	Disposal Approver	
UNREPAIRABLE/RELEASABLE				Smith, Jerry E	
Comment: This record was imported from General PITA in January 2016 and did not have date assigned. For tracking purposes, we used the same date for date received and date disposed.					

[Save](#) [Request Disposal](#)

Using the Custodian cell, type the last name of the new custodian and choose the correct name from the drop down box. Click Save to assign the new custodian. The new custodian will receive an email notifying them of the change.

ACTIONS REQUIRED TO REMOVE OUTDATED, UNSERVICEABLE OR ASSETS NO LONG REQUIRED BY YOU OR YOUR DEPARTMENT

If the asset becomes unserviceable, outdated, or no longer required, the custodian may request disposal.

Association of Universities for Research in Astronomy, Inc. AURA PIMA Search Reports Links Contact What's New? Help, Sign In/Out, Change, Logout, Print

Edit Property Record for Asset Number: 478040-1-3

Back to Asset Back to List

Property	Status	Inventory Log
Value: \$6,112.46	Date Received: 4/21/2014	AssetNumber: 478040-1-3
Make: Dell	Model: Power Edge R430	Serial: d8x02
Status: Active	Description: Server, Intel Atom E 3804 v2, Processor	
Class: IT - Servers & Equipment	Category: General Purpose Hardware: Data Processing Equipment (Including Processors, Software, Updates and Support Equipment)	Vehicle Type:
PO Number: 4072242	Account Number: C1400000000	Check Number:
CA:	Ownership: AURA	PO Date: 4/21/2014
Creator: Smith, Jerry E.	Custodian: Smith, Jerry E.	Last Invented: 4/21/2014
Parent Asset:	Center: AURA	Site: AURA
Place: Texas	Location: CAA	Record Created: 4/21/2014
Last Modified: 4/21/2014	Condition: SERVICEABLE-TOOBERABLE	Export Control:
Date Disposed:	Disposal Method:	Disposal Approver: Smith, Jerry E.
Comment: This record was imported from GenCorp PDS in January 2015 and did not have these assigned. For tracking purposes, we used the same date for date received and date accepted.	Approve Image: Choose File No file chosen	

Save Request Disposal

From the Edit screen, enter a comment describing the detailed condition and status of the asset. Be as specific as possible. When you have completed your comments, click on the Request Disposal tab highlighted in dark blue. Then click on the Save box. Notification will be sent to the Property Officer that the asset is available for disposal.

Property Administrator Instructions

The Property Administrator is responsible for adding, updating, transferring and disposing of all government and AURA assets.

To complete a General Search:

Association of Universities for Research in Astronomy, Inc. AURA PIMA Search Add New Asset Pending Inventory Reports Links Contact What's New? Help, Sign In/Out, Change, Logout, Print

Admin. Search

Filter: Please use appropriate filter to find the results. Larger results will take longer to process.

Type of Search: All

Status: All

Asset: All

Location: All

Category: All

Make: All

Model: All

Serial: All

Year: All

Value: All

PO Number: All

CA: All

Disposal Method: All

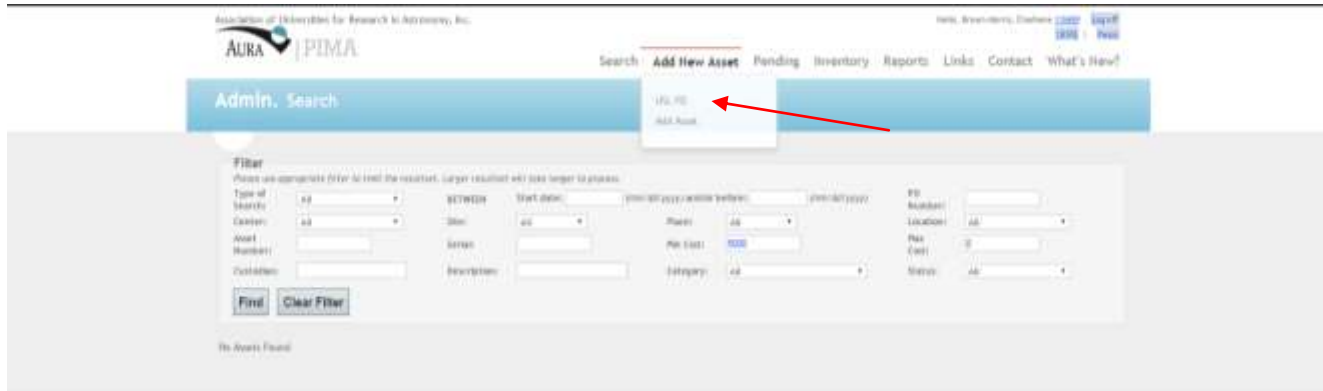
Disposal Approver: All

Find Clear Filter

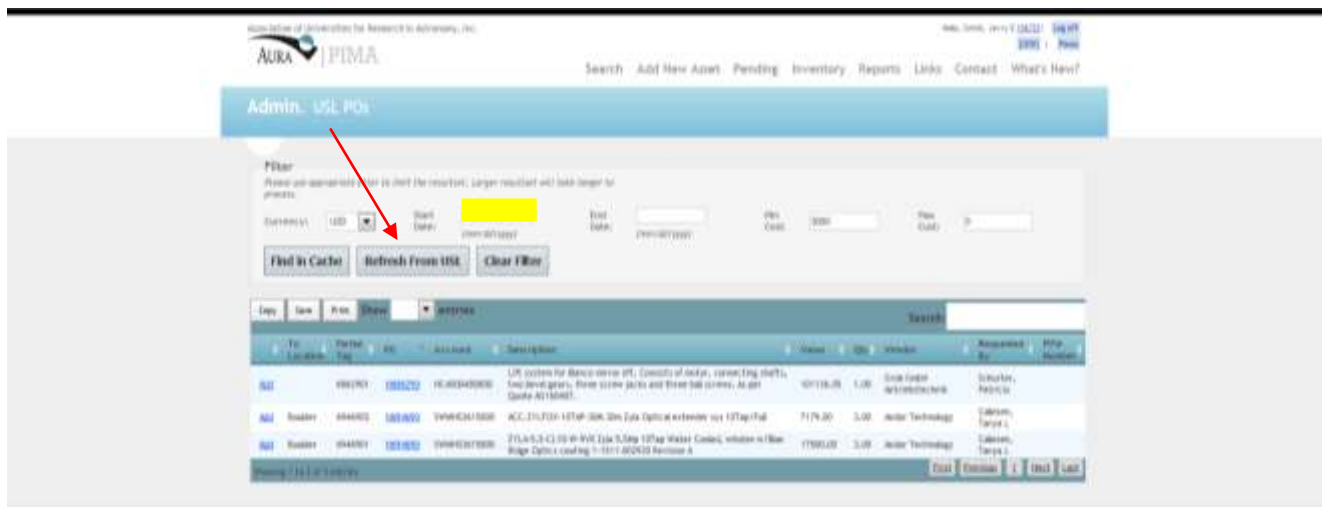
No Assets Found

Using the drop boxes, select the type of search you wish and click Find.

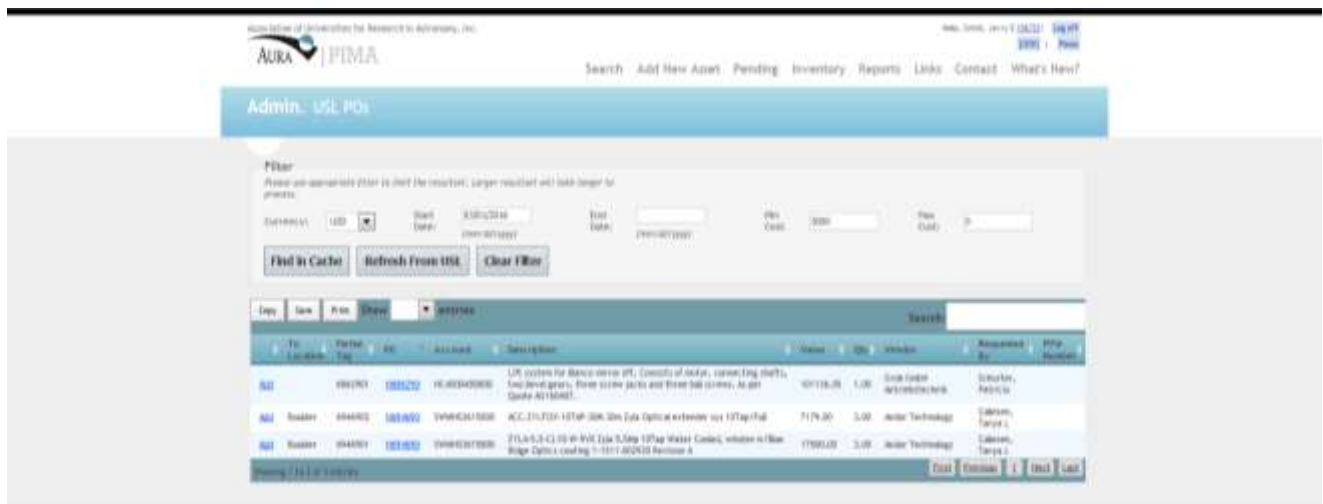
Add New Assets:



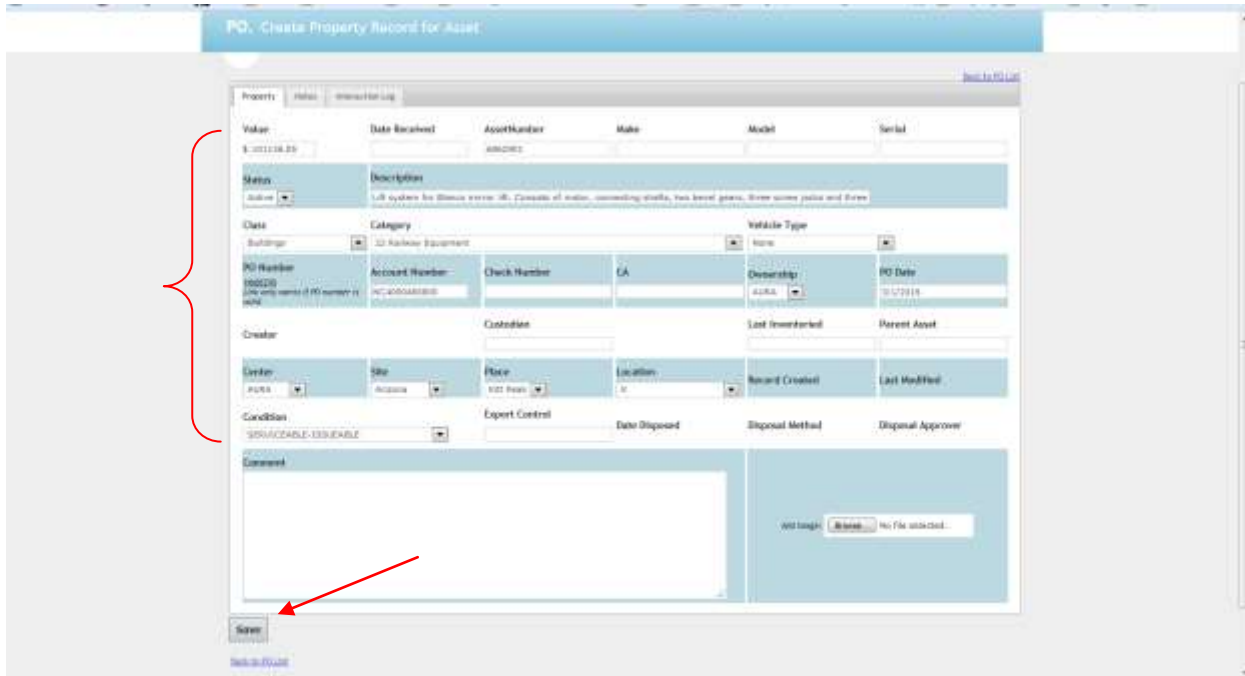
Using the Add New Asset option at the top, select USL PO.



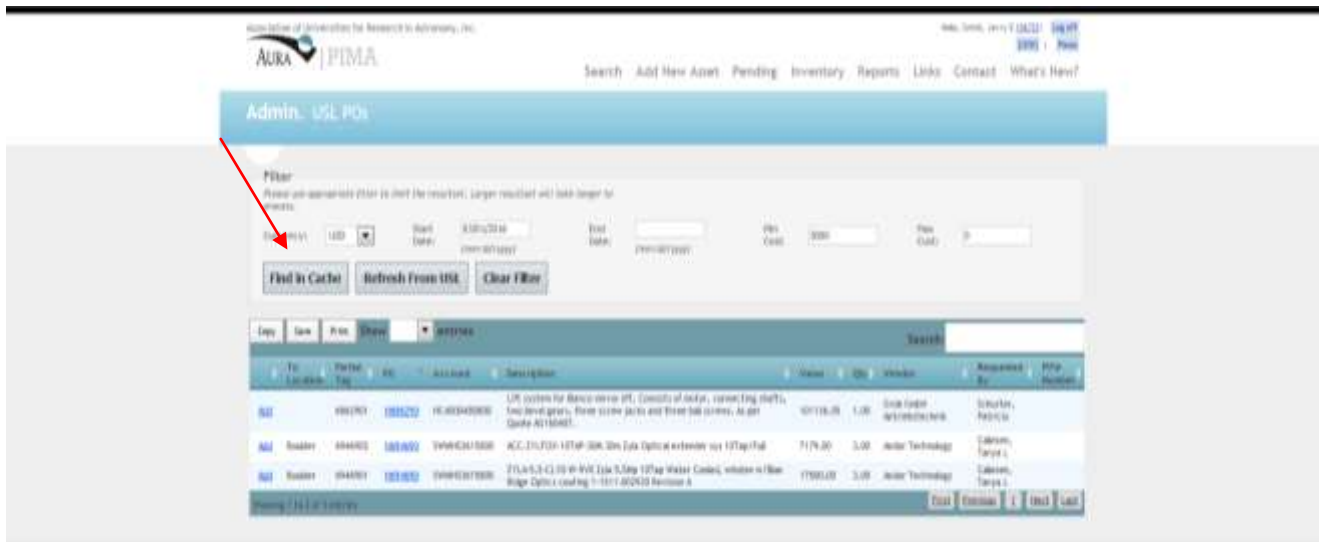
To begin, enter a Start Date (End Date is optional) and then click the Refresh From USL box. This will pull any new asset information from USL into the PIMA system.



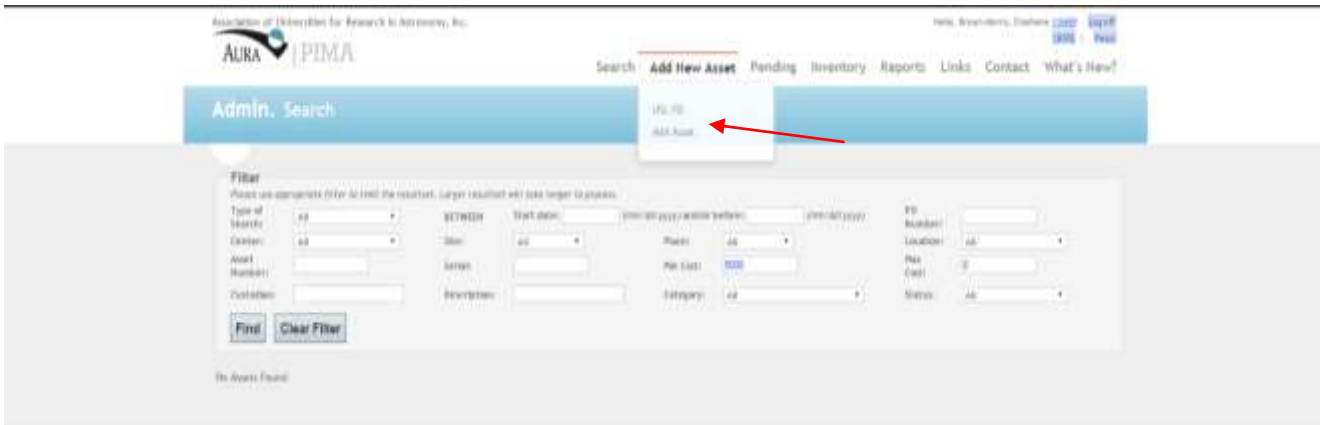
Select Add next to the asset.



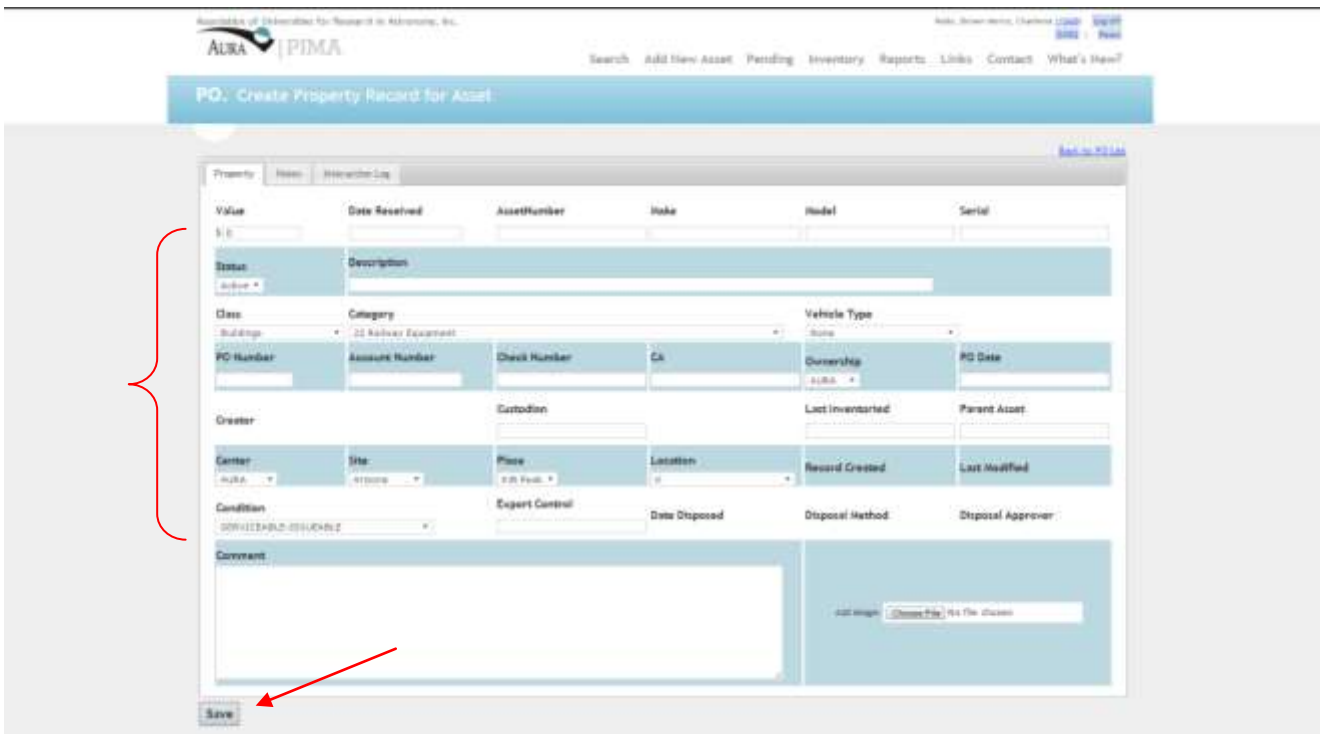
The record will automatically populate. Make any necessary changes and click Save.



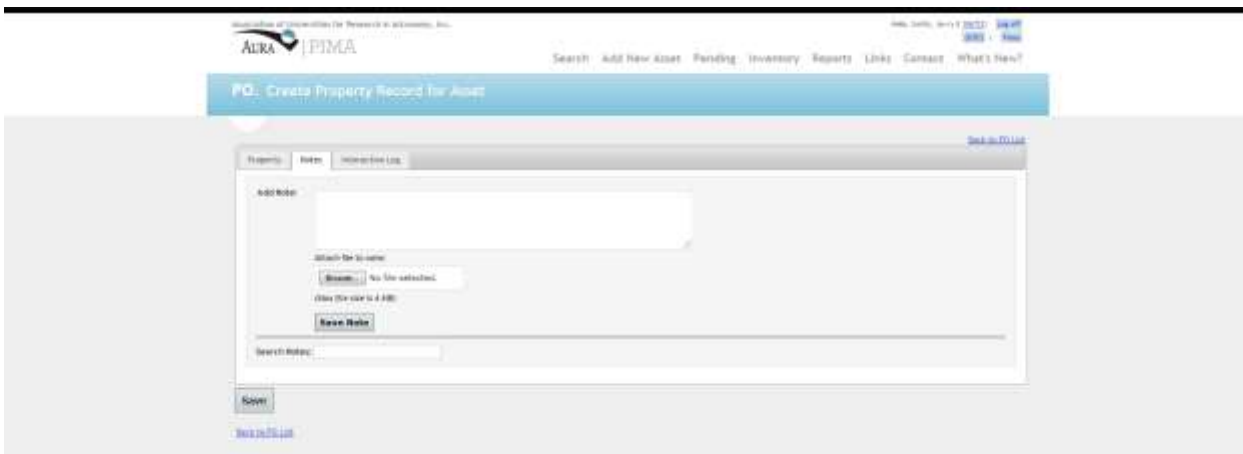
Choose the Find In Cache to view a list of all eligible assets stored in your computer's cache.



If new asset information is not available in USL and requires manual input, choose the Add Asset option from the drop box.

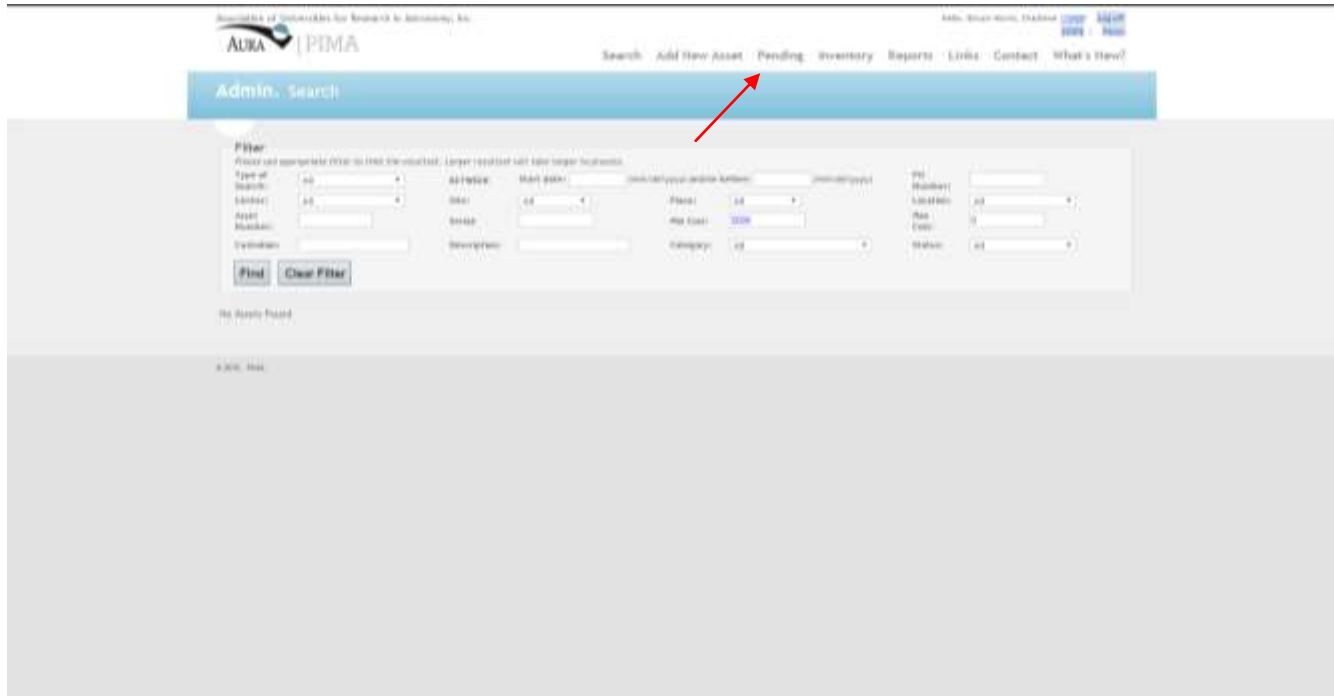


Manually enter all required information for the asset and click Save.

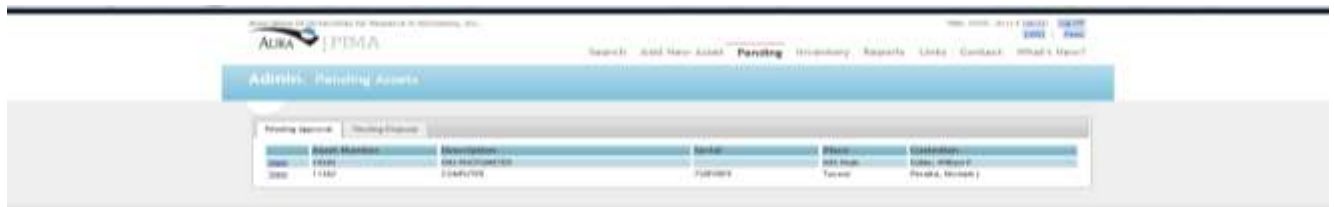


Any additional information may be added under the Notes tab. Click Save Note when complete.

Pending:

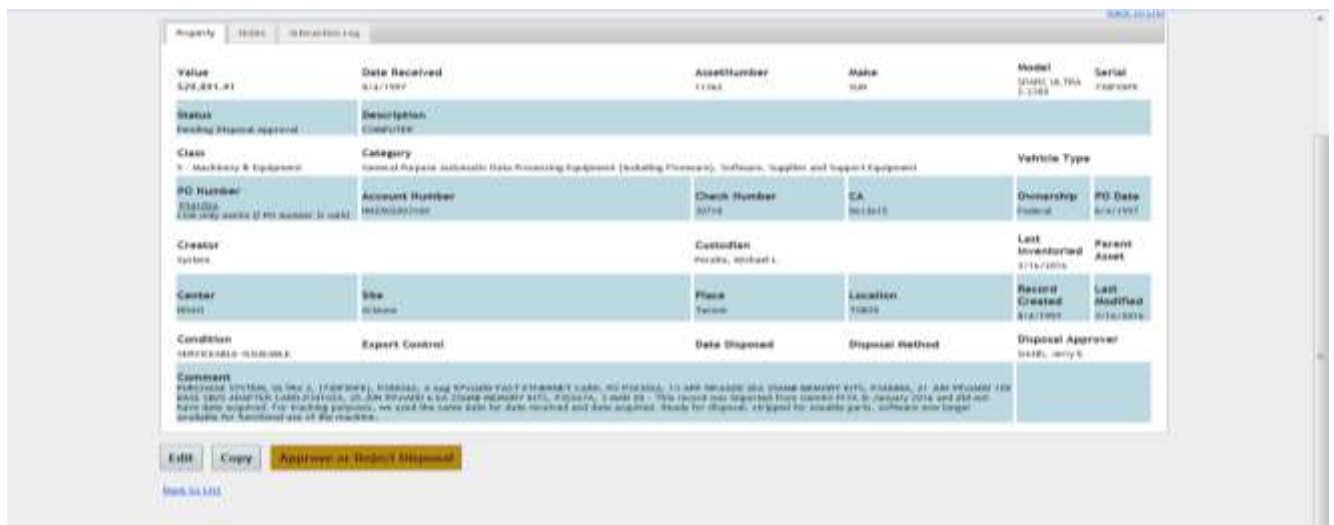


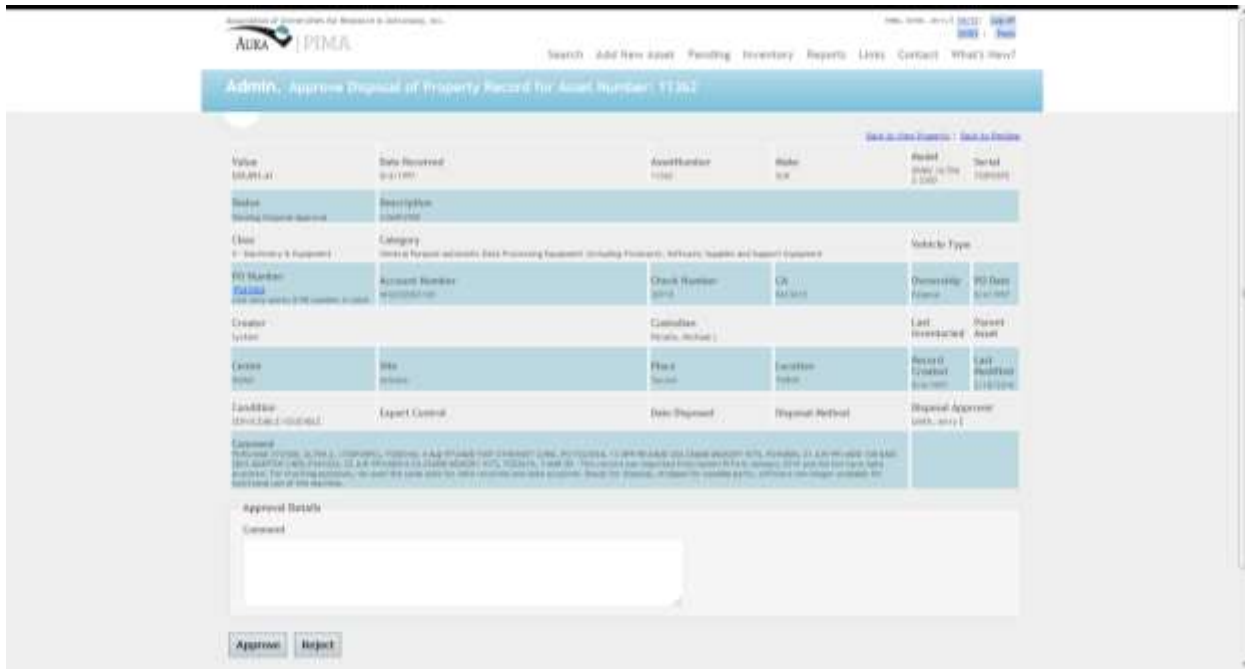
To approve or deny the disposal of an asset, choose the Pending option.



Click the View option for the selected asset.

After verifying that all information is correct, click the Approve or Reject Disposal box.





Note in the Comment box whether the asset was approved for disposal or why it was rejected. Click Approve or Reject. If the asset disposal request is approved, the status of the asset will change to Disposed. If the disposal is rejected, the request will be returned to the custodian for additional information.

Annual Inventory

This tab is utilized only with the tablet and bar code reader for Physical Inventory.

Before starting yearly inventory cycle:
Clear the Tablet and then Update to refresh data on tablet.
DO NOT clear tablet if there are unsynched assets.

Clear Tablet (Remove all data) **Update Tablet**

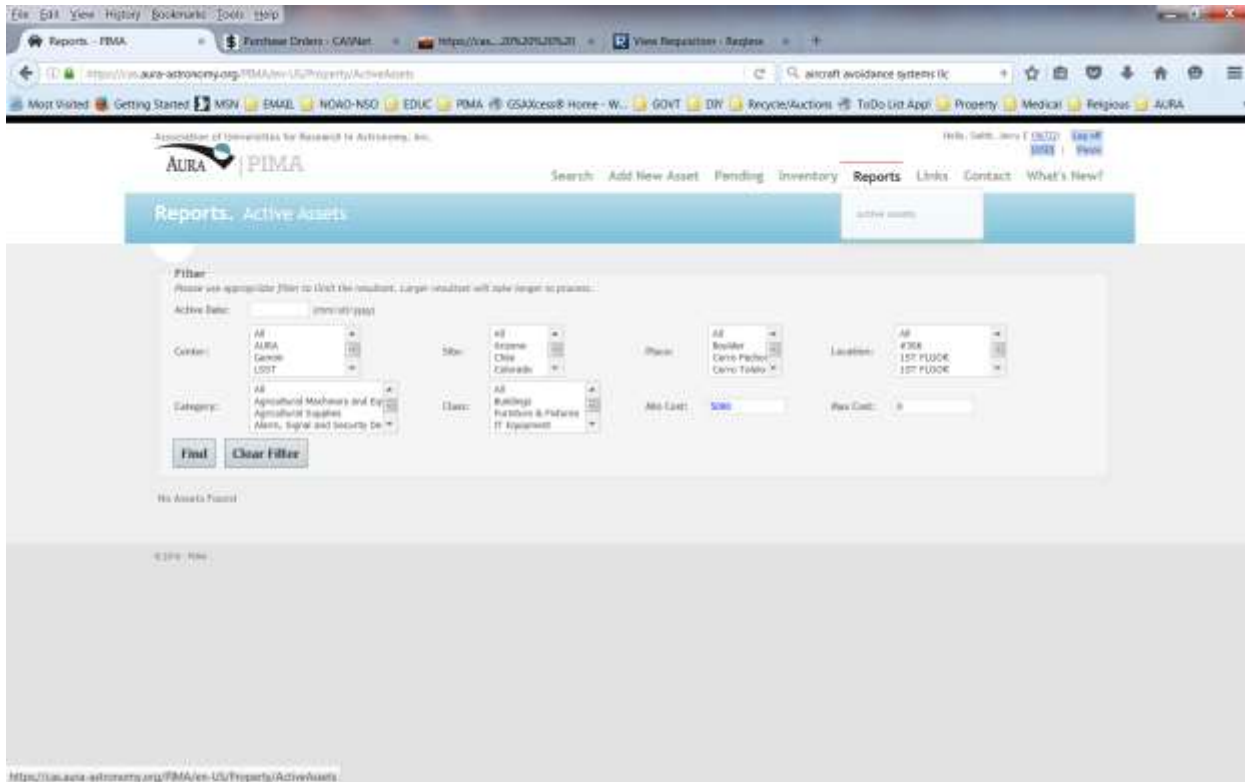
Scan barcode into textbox below and Confirm

Barcode **Confirm Inventory**

Verify location and use the Edit link to update if needed:

- '6465801' synched to database.
- '6465801 at CAS' saved on tablet [Edit in PIMA](#)

1. Enable WIFI and browse to the URL in Chrome or Firefox. Bookmark page.
2. The upper right corner will display Online with green background when tablet is online and Offline with red background when offline.
3. Log in to PIMA.
4. Before starting the yearly inventory cycle, Clear Tablet and then Update Tablet (using buttons shown above) to get the latest inventory onto tablet. Only clear tablet before starting inventory, as it will remove all data on tablet.
5. If you are going to inventory in an off line location, leave the page shown above open in the browser. (You will not be able to browse to URL once offline).
6. When ready to inventory, ensure the cursor is placed in the Barcode block and scan the barcode into the Barcode textbox and save via Confirm button.
7. The tablet will display that the barcode is saved on the tablet. It will also list the recorded location and provide an Edit link where you can update the location in PIMA.
8. If the tablet is online it will also synch with PIMA and display a line saying that barcode has been synched with database (in PIMA).
9. The most recent scanned barcode will be at the top of the list.
10. If the tablet is offline, only the Saved To Tablet lines will be shown. Once back online it will synch automatically when Confirm is selected (or page is re-opened or refreshed) and display the synch messages. Each time you scan a barcode it will check if tablet is online and synch all local data.
11. If you are finished scanning barcodes in an offline location and are now back in a location where the tablet is online, you can simply refresh the page to synch all scanned data.
12. **DO NOT** Clear Tablet and **DO NOT** clear the browser cache while there are un-synched assets as that will remove them.
13. If the sync is done by refreshing the page, the log lines with Edit links will be cleared. Please make any edits before refreshing the page.



The Reports page currently has one report that gives a listing of active assets by date. Enter the desired date in the Active Date cell and any other appropriate parameter desired and then select Find.

PROPERTY INVENTORY MANAGEMENT APPLICATION (PIMA)

MANUAL DE USUARIOS

Con respecto a los acuerdos cooperativos ente AURA y NSF, se debe mantener un registro de todos los equipos capitalizables (bienes sobre US \$5000). PIMA es la aplicación que AURA utiliza para dar cumplimiento a estos requerimientos.

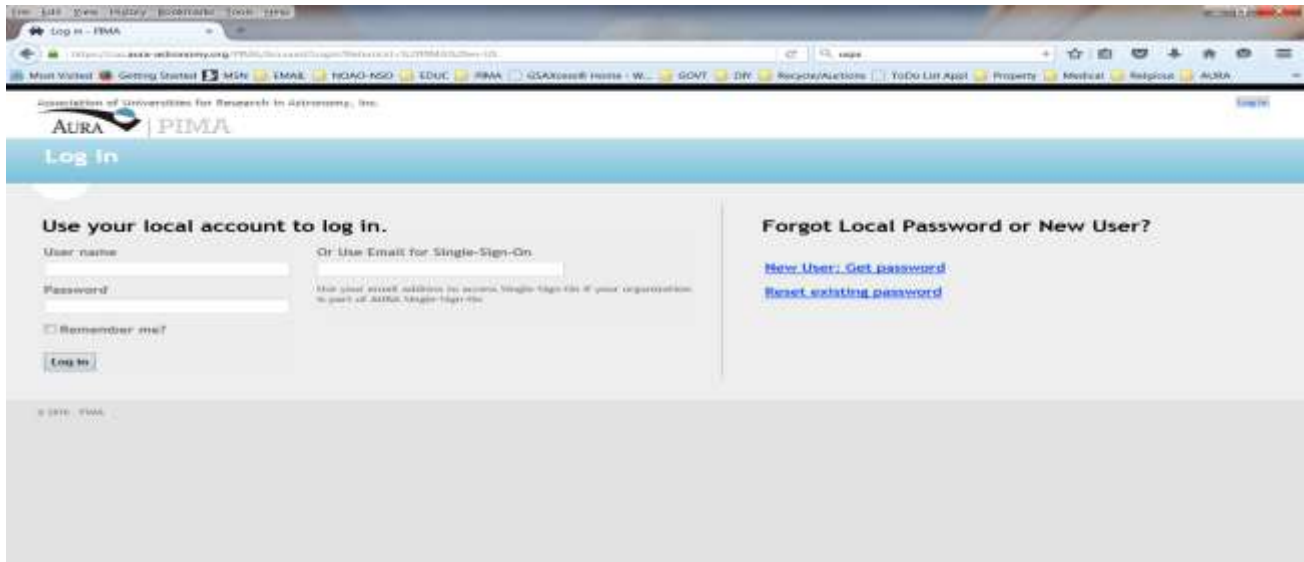
Todos los bienes o activos adquiridos que tengan un valor superior a \$5000 dolares deben ser registrados, rastreados, inventariados y enajenados para cumplir con este requerimiento.

Al usar PIMA, Ud. puede tener acceso a la documentación de cualquier activo inventariado, incluyendo la requisición, la orden de compra, números de guías de embarques, facturas, el historial financiero de la compra.

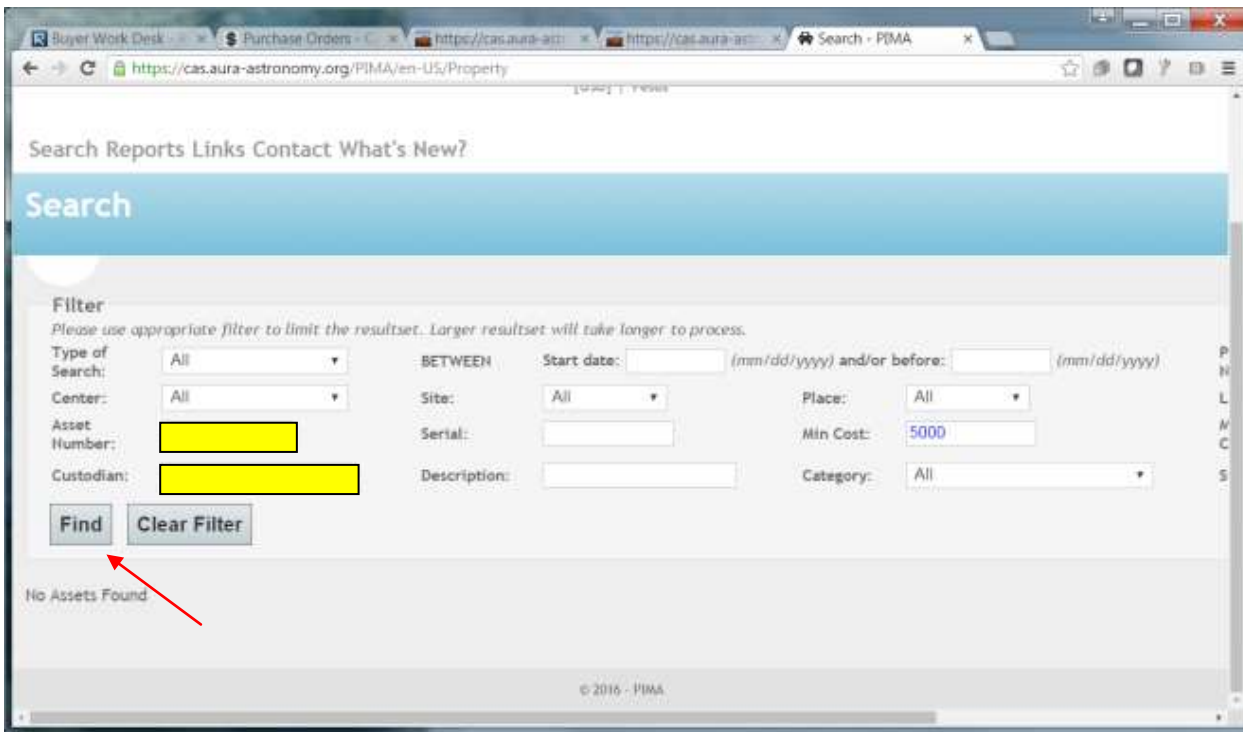
Ud. puede acceder PIMA a través del siguiente link:

<https://cas.aura-astronomy.org/PIMA>

Para ingresar a PIMA utilice su nombre de usuario (número de empleado) y su clave de REQLESS.



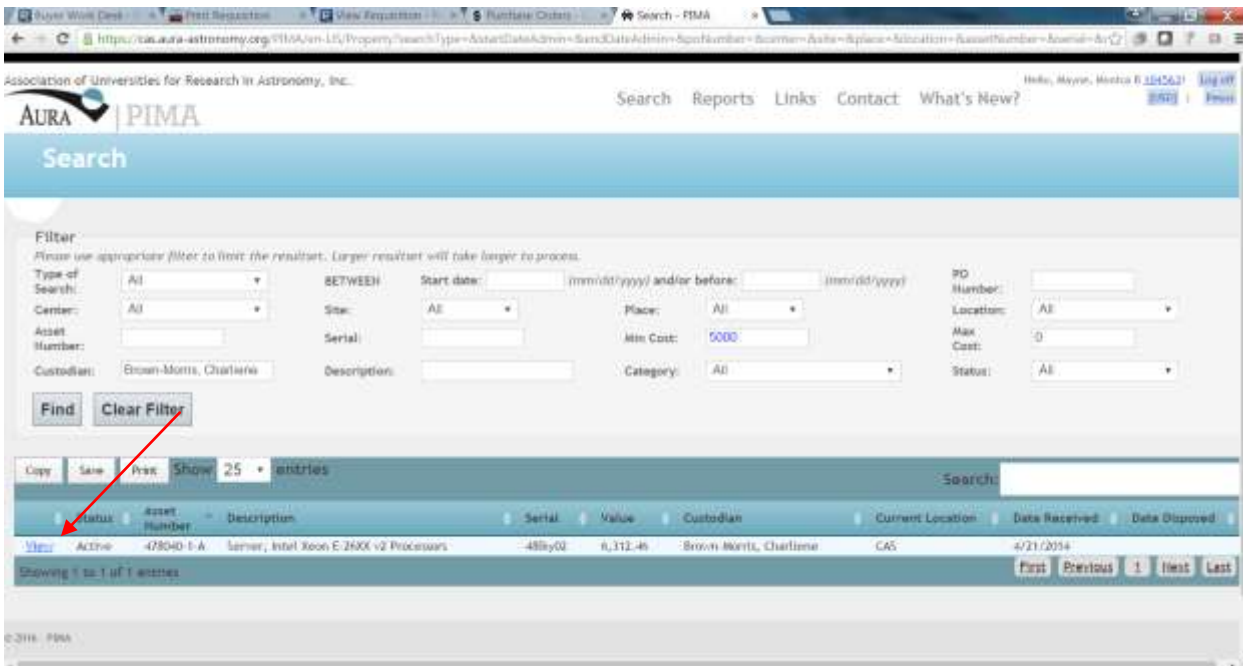
Una vez iniciada la sesión, se irá directamente a la pantalla de búsqueda.

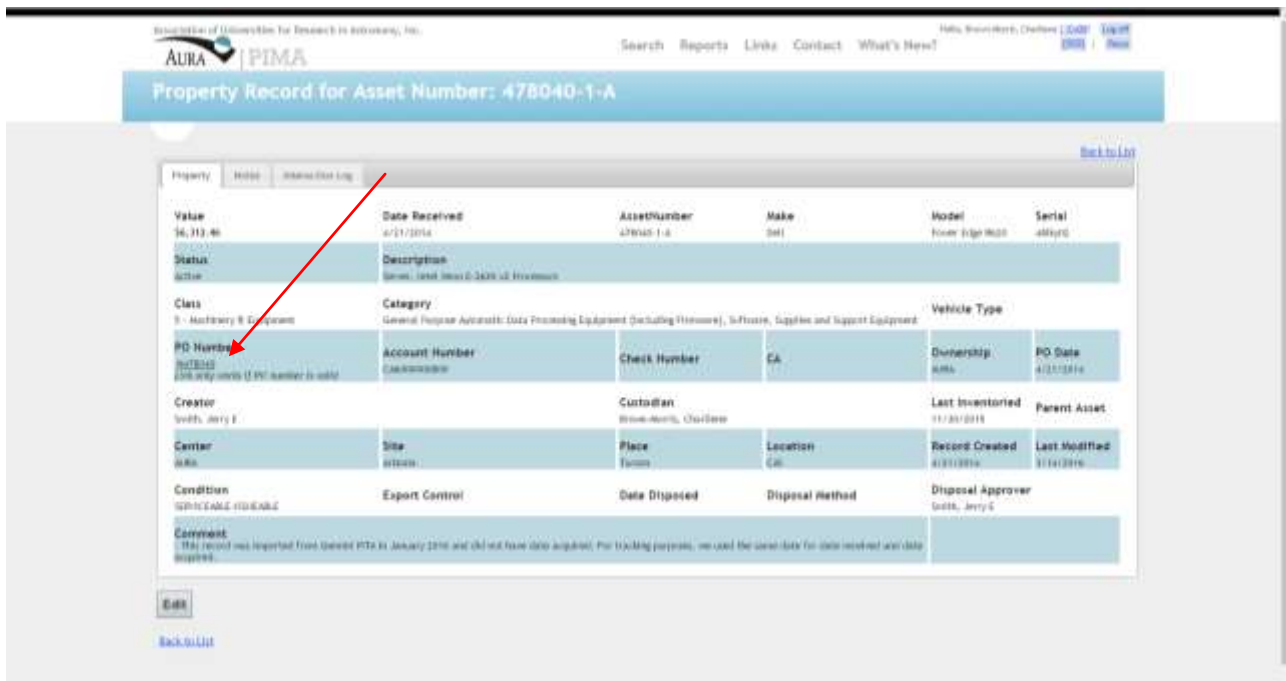


Ingrese el número de inventario en “Asset Number” y haga click en “Find”.

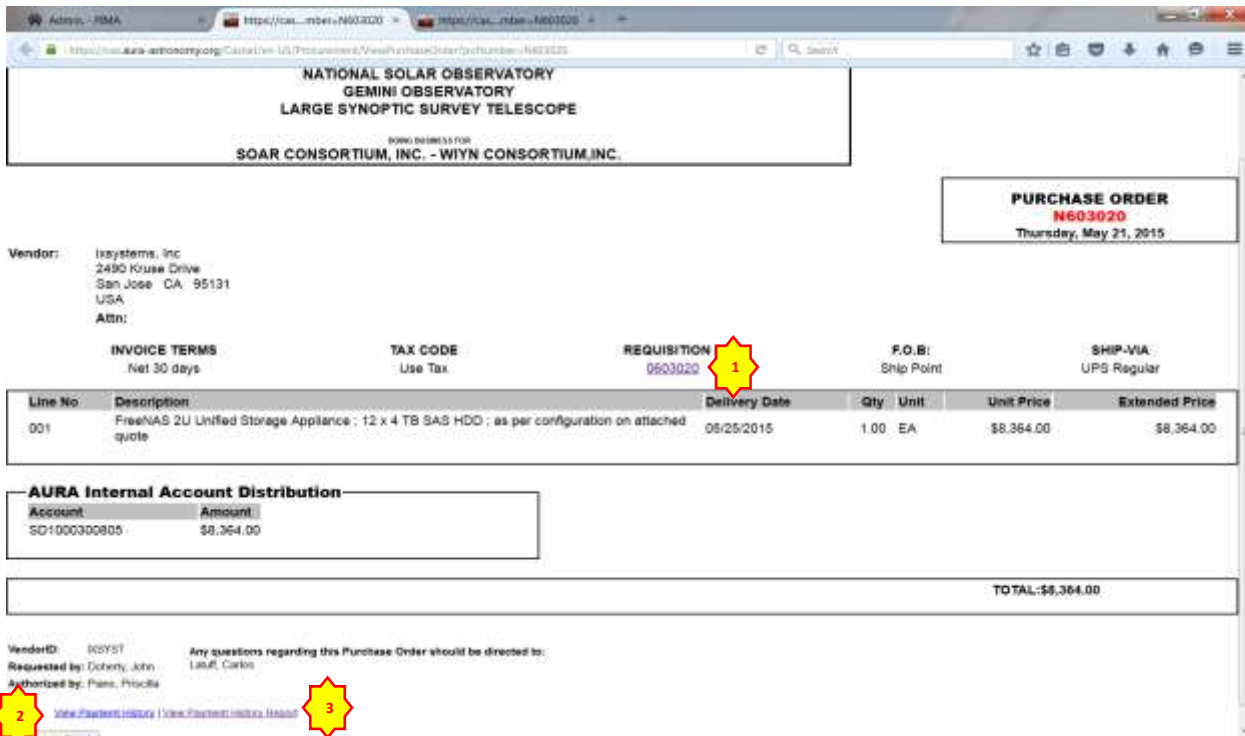
Si no sabe el número de inventario, Ud. puede ingresar el nombre del custodio (usuario) en el recuadro “Custodian”, comience con el apellido para que pueda elegir el nombre apropiado que esta buscando y haga clic en el recuadro “Find” para obtener el listado de todos los bienes asignados a esa persona en particular.

Desde la lista de inventario, haga clic en la opción “View” que se encuentra a la izquierda del “Status-Active” para ver el registro de la propiedad.





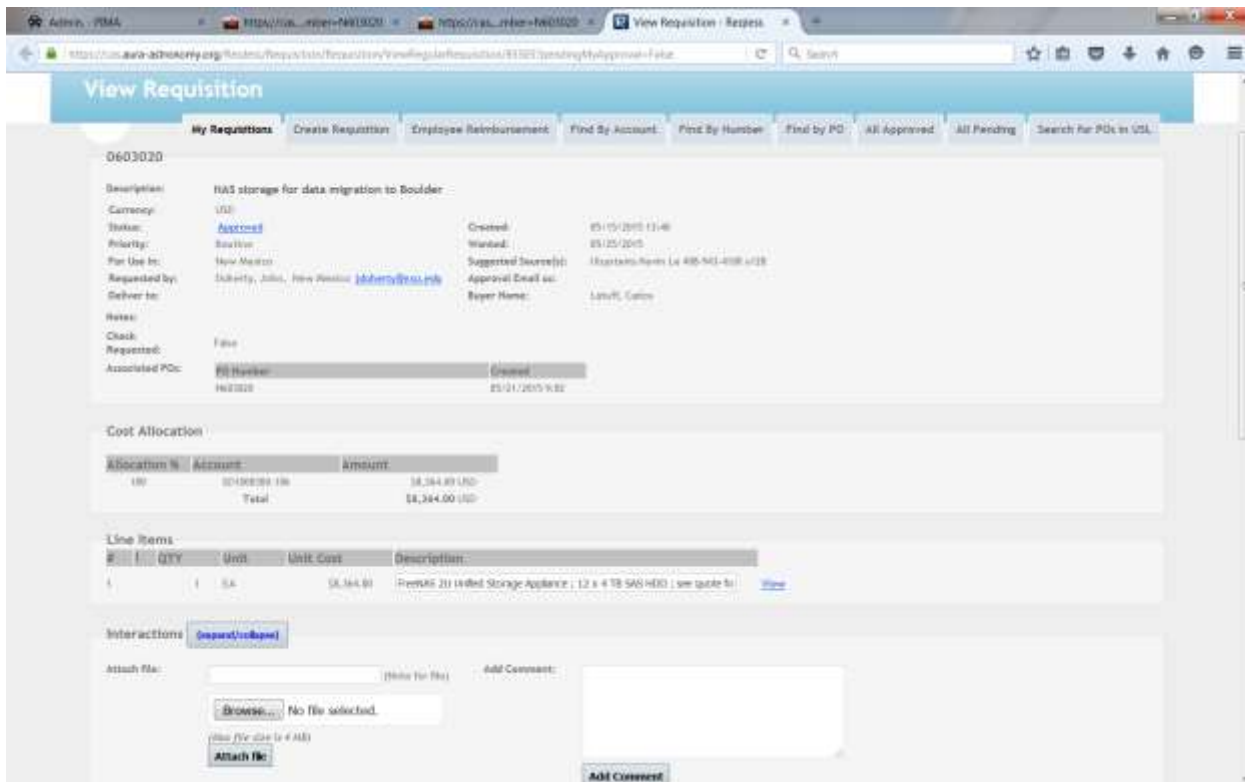
Desde el Registro de la Propiedad, al hacer clic en el número de PO (Orden de Compra) se le dirigirá a una versión no oficial de la orden de compra en CASNET.



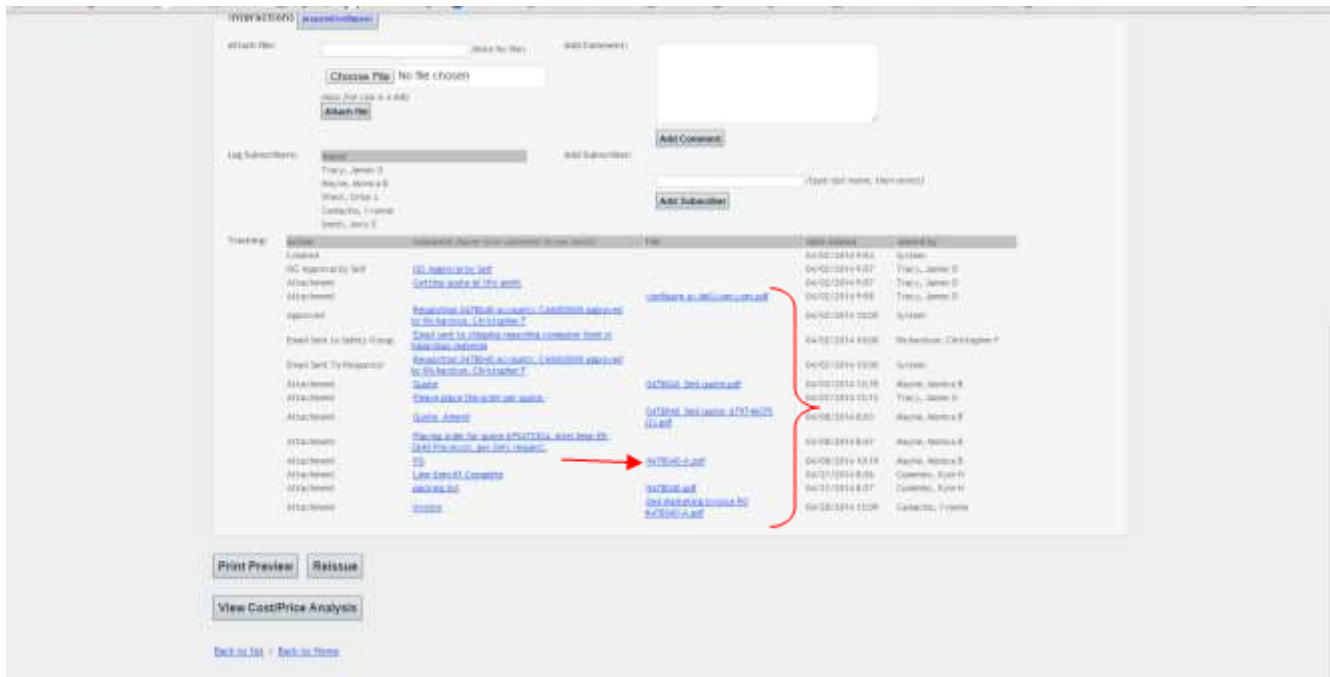
Para acceder a la Requisición, haga clic en el número de la Requisición ⁽¹⁾ resaltado en azul en la parte superior de la PO (Orden de Compra).

Desde la orden de compra, Ud. puede acceder a un historial de pagos del activo, haciendo clic en “View Payment History” ⁽²⁾ en la parte inferior de la página.

Si eliges “View Payment History Report” ⁽³⁾, accederá a los detalles de la Orden de Compra.



Si eliges Requisición ⁽¹⁾, Ud. puede ver una copia de la Requisición en Reqless.

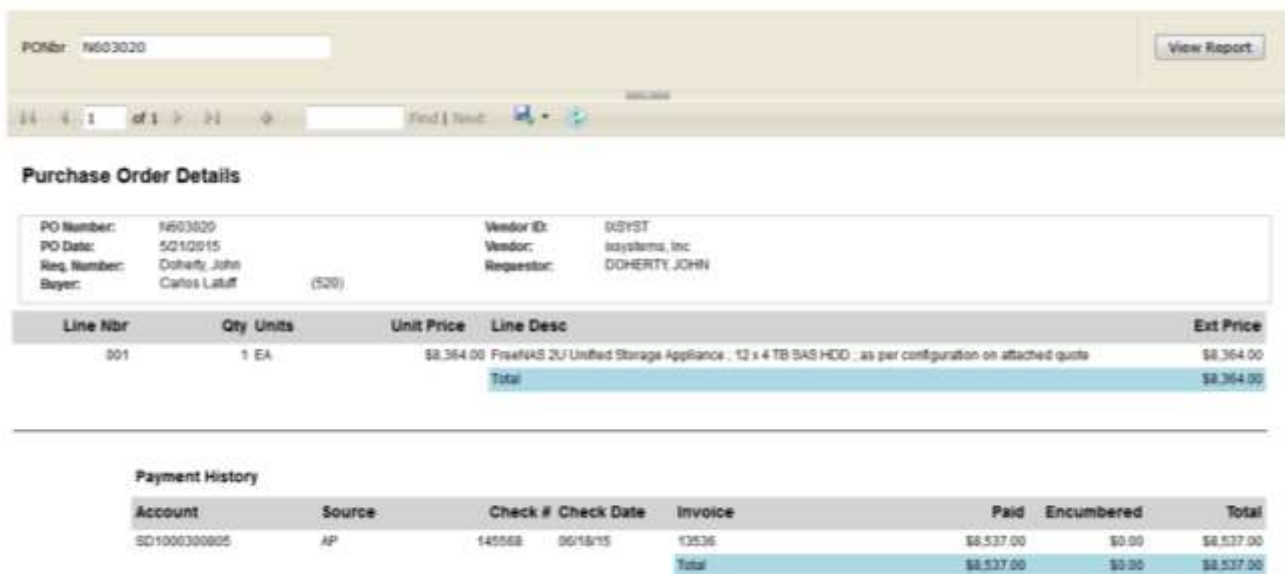


Al hacer clic en los enlaces a los archivos adjuntos en la parte inferior de la requisición, es posible ver toda la documentación relacionada con el activo, inclusive el número de las guías de embarques y facturas.

Para ver la versión oficial de la Orden de Compra debes elegir la copia escaneada en la lista de archivos adjuntos.



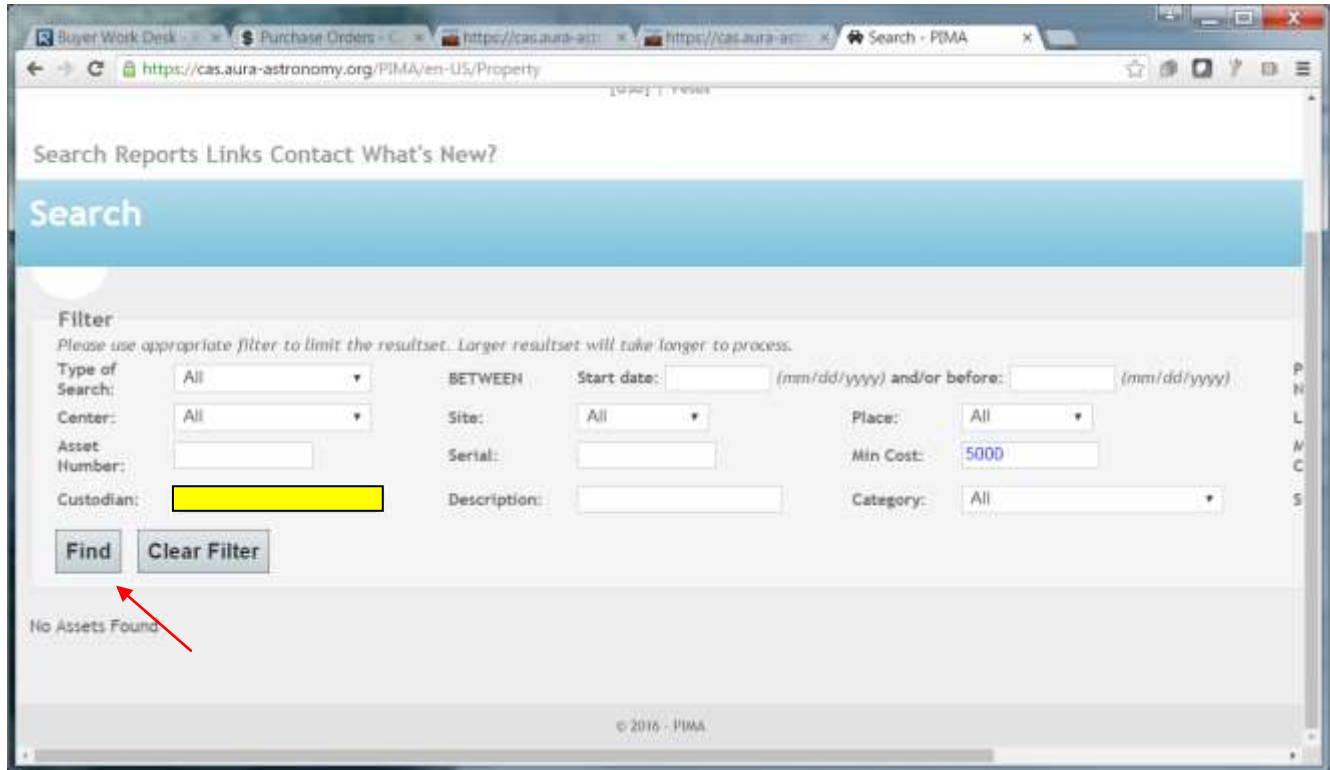
Si eliges “Payment History link ⁽²⁾” muestra la información básica de pago de la Orden de Compra para el activo en Casnet.



Si eliges “View payment History Report ⁽³⁾”, muestra una copia de los detalles de la orden de compra, incluyendo toda la información de pago.

Instrucciones para que los custodios puedan actualizar sus registros en PIMA.

No todos los empleados tienen asignado la custodia de los activos de AURA. Para aquellos que si lo tienen, es responsabilidad de cada Custodio (usuario) mantener los registros de PIMA actualizados, esto es para cada uno de los activos que se les asigna. A continuación se presentan los pasos para actualizar un registro en PIMA.

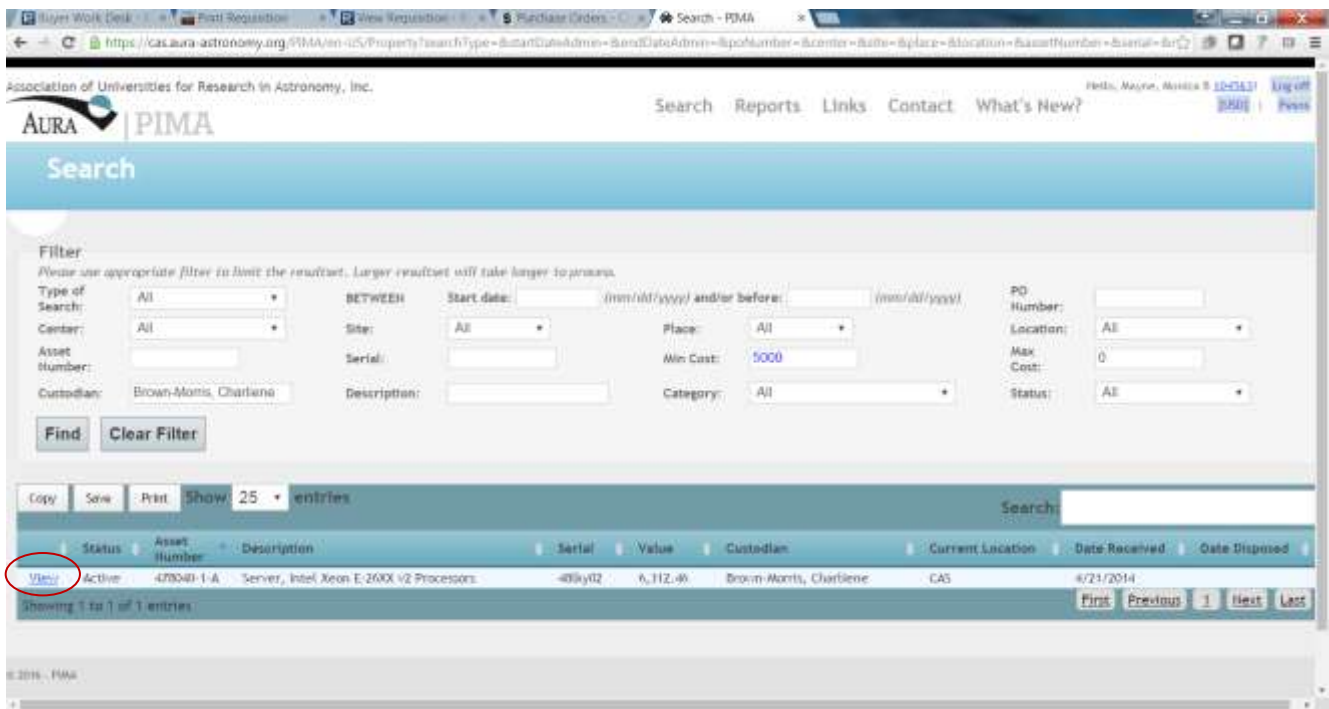


The screenshot shows a web browser window with the URL <https://cas.aura-astronomy.org/PIMA/en-US/Property>. The page has a navigation bar with links for "Search Reports Links Contact What's New?". Below this is a "Search" section with a "Filter" form. The form includes the following fields and controls:

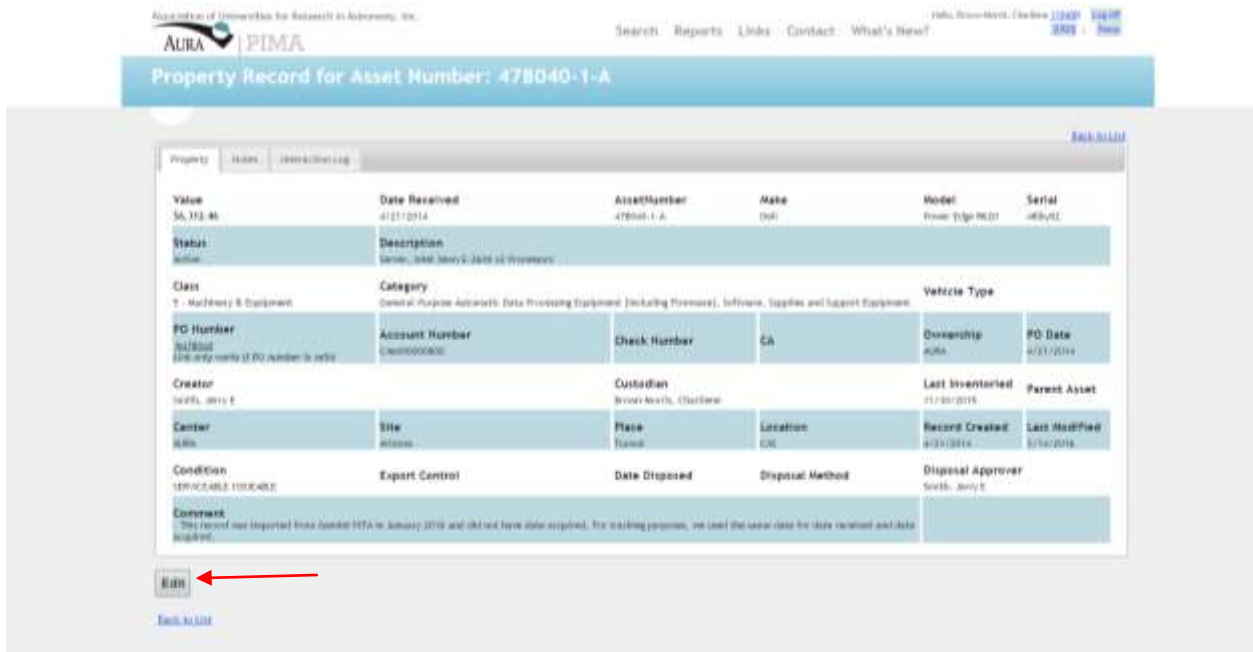
- Type of Search:** A dropdown menu set to "All".
- Center:** A dropdown menu set to "All".
- Asset Number:** A text input field.
- Custodian:** A dropdown menu with a yellow highlight on the selected option.
- BETWEEN Start date:** A date input field with a format hint "(mm/dd/yyyy)".
- and/or before:** A date input field with a format hint "(mm/dd/yyyy)".
- Site:** A dropdown menu set to "All".
- Serial:** A text input field.
- Place:** A dropdown menu set to "All".
- Min Cost:** A text input field containing the value "5000".
- Description:** A text input field.
- Category:** A dropdown menu set to "All".

At the bottom of the filter section are two buttons: "Find" and "Clear Filter". A red arrow points to the "Find" button. Below the filter section, the text "No Assets Found" is displayed. The footer of the page contains the copyright notice "© 2016 - PIMA".

Ingrese su apellido en la celda "Custodian" y seleccione el nombre correcto desde la lista que se despliega. Luego haga clic en "Find".



Desde el listado de activos, elija "View".



Como custodio de los activos de AURA, Ud. puede editar campos, tales como, "Center, Site, Place, Location, and Comment". Para editar el registro, haga clic en el cuadro "Edit" en la parte inferior de la página.

Property Record for Asset Number: 478040-1-A

Value	Date Received	AssetNumber	Make	Model	Serial
16,113.44	4/21/2014	478040-1-A	Dell	Power Edge R410	483402
Status	Description				
Active	Server, Intel Atom E 3804 v2 Processor				
Class	Category	Vehicle Type			
IT - Hardware & Equipment	General Purpose Hardware: Data Processing Equipment (Including Peripherals, Software, Supplies and Support Equipment)				
PO Number	Account Number	Check Number	CA	Ownership	PO Date
402500	CA00000400			408A	4/21/2014
Creator	Custodian	Last Invented		Parent Asset	
Saunders, Jerry E	Brown-Harris, Charles	4/21/2014			
Center	Site	Place	Location	Record Created	Last Modified
10110	Arizona	Tucson	OUR	4/21/2014	4/21/2014
Condition	Export Control	Date Disposed	Disposal Method	Disposal Approver	
REPAIRABLE-REPAIRABLE				Saunders, Jerry E	
Comment					
<p>This record was imported from General PTA in January 2014 and did not have data acquired. For tracking purposes, we used the same date for date received and date acquired.</p>					
<p>Attach Image: <input type="button" value="Choose File"/> to file stream</p>					
<p><input type="button" value="Save"/> <input type="button" value="Request Disposal"/></p>					

Para editar la información de estos campos, Ud. puede elegir entre las opciones en los cuadros desplegables.

La ubicación física específica de un activo (por ejemplo “en la parte inferior del estante de la oficina 101”) deberá ser ingresada en el recuadro “Comment”. Mientras mas específico sea la ubicación, más útil será durante el inventario físico.

Haga clic en “Save” cuando haya completado sus cambios o comentarios.

Property Record for Asset Number: 478040-1-A

Notes

Add Note:

Attach File to Note:

to file stream

Max file size is 4 MB

Search Notes:

[Back to List](#)

La información adicional sobre el activo se puede ingresar en “Notes tab” en la parte superior del registro de la propiedad. Haga clic en el recuadro “Edit” para añadir cualquier nota que desee, luego haga clic en “Save Note”.

COMO TRANSFERIR ACTIVOS A OTRO CUSTODIO O USUARIO

Si transfiere el activo a un nuevo custodio, debe cambiar el registro para reflejar el nuevo custodio.

Property Record for Asset Number: 478040-1-A

Value	Date Received	Asset Number	Make	Model	Serial	
\$6,112.46	4/11/2014	478040-1-A	IBM	Power Edge R617	48342L	
Status	Description	Active				Server, IBM Model 478040-1-A
Class	Category	Vehicle Type	General Purpose Automatic Data Processing Equipment (Including Peripherals, Software, Supplies and Support Equipment)			
PG Number	Account Number	Check Number	CA	Ownership	PD Date	
3478040	4400000000			478040	4/11/2014	
Creator	Custodian	Last Invented	Parent Asset			
SMITH, JERRY E	Brown-Morris, Christine	11/20/2013				
Center	Site	Place	Location	Record Created	Last Modified	
478040	478040	Tucson	100	4/11/2014	4/11/2014	
Condition	Export Control	Date Disposed	Disposal Method	Disposal Approver		
UNRECOVERABLE/ISSUEABLE				SMITH, JERRY E		
Comment	This record was imported from General PITA in January 2014 and did not have date assigned. For tracking purposes, we used the same date for date received and date acquired.					

[Edit](#)

En la pantalla de registro de la propiedad, seleccione "Edit".

Edit Property Record for Asset Number: 478040-1-A

Value	Date Received	Asset Number	Make	Model	Serial	
\$6,112.46	4/11/2014	478040-1-A	IBM	Power Edge R617	48342L	
Status	Description	Active				Server, IBM Model 478040-1-A
Class	Category	Vehicle Type	General Purpose Automatic Data Processing Equipment (Including Peripherals, Software, Supplies and Support Equipment)			
PG Number	Account Number	Check Number	CA	Ownership	PD Date	
3478040	4400000000			478040	4/11/2014	
Creator	Custodian	Last Invented	Parent Asset			
SMITH, JERRY E	Brown-Morris, Christine	11/20/2013				
Center	Site	Place	Location	Record Created	Last Modified	
478040	478040	Tucson	100	4/11/2014	4/11/2014	
Condition	Export Control	Date Disposed	Disposal Method	Disposal Approver		
UNRECOVERABLE/ISSUEABLE				SMITH, JERRY E		
Comment	This record was imported from General PITA in January 2014 and did not have date assigned. For tracking purposes, we used the same date for date received and date acquired.					

[Save](#) [Request Disposal](#)

Usando la celda "Custodian", escriba el apellido del nuevo custodio y elija el nombre correcto en el cuadro desplegable. Haga clic en "Save" para asignar el nuevo responsable. El nuevo custodio recibirá un correo electrónico notificándole el cambio.

ACCIONES QUE SE REQUIEREN PARA REMOVER ACTIVOS OBSOLETOS, INSERVIBLES O QUE YA NO SON REQUERIDOS POR UD. O SU DEPARTAMENTO

Si el activo se convierte en inservible, obsoleto, o ya no es necesario porque cumplió con su vida útil, el Custodio o Responsable podrá solicitar su eliminación.

The screenshot shows the 'Edit' screen for a Property Record for Asset Number 478040-1-4. The interface includes a header with the AURA and PIMA logos, a search bar, and navigation links. The main content area is divided into several sections for data entry. A red bracket highlights the 'Comment' field, which contains a note about the record's import from Genent PTSA in January 2015. A red arrow points to the 'Request Disposal' button, which is highlighted in dark blue. Below the comment field are 'Save' and 'Request Disposal' buttons.

En la pantalla “Edit”, ingrese un comentario que describa la condición y el estado detallado del activo. Sea lo más específico posible. Cuando haya completado sus comentarios, haga clic en la pestaña “Request Disposal” resaltado en azul oscuro. A continuación, haga clic en el cuadro “Save”. La notificación será enviada al Oficial Control de Inventarios, indicando que el activo está disponible para su eliminación