PROCESSING EQUIPMENT ORDERS IN GATEWAY

The Gateway Requisition contains a section into which information must be entered when inventorial equipment is being purchased. Unfortunately, Gateway does not mandate this information and it is often missing or incomplete. Future modifications of Gateway, once the Asset Management component of the PeopleSoft financial system is active, will enforce completion of mandatory data fields, and will validate them.

The blank Equipment Management section in Gateway appears as follows, with sections related to Equipment Purchases and Add-Ons, Fabrications and Trade-Ins. If the data field ends in a question mark (Inventory Equipment? Title Vests With?), you are presented with a dropdown arrow and a set of responses.

![Equipment Management Table]

- **Inventory Equipment?** Yes / No
- **Custody Code**
- **Title Vests With?** UC / Federal / State / Other
- **Add-On to Property No.**
- **Location**

![Fabrication Information Table]

- **Fabrication?** Yes / No
- **Fabrication Name**
- **Fabrication Property No.**
- **Fabrication ID No.**

![Trade-In Table]

- **Trade-In?** Yes / No
- **Trade-In Value**
- **Trade-In Property No.**
1. **NEW PIECE OF INVENTORIAL EQUIPMENT**

When ordering a new piece(s) of inventorial equipment, the following data fields should be completed:

a. **Inventory Equipment?** – YES

b. **Custody Code** – enter the 3 elements, Location – Department Custody – Subcode (usually FUND NUMBER) – separated by dashes

c. **Title Vests With?** – choose the appropriate selection (usually UC, but may be Federal, State or Other)

d. **Location** – enter the Building Number, Room Number (if applicable) and User Code (two characters, usually user initials) – separated by slashes or dashes

![Equipment Management](image-url)
2. ADD-ON TO AN EXISTING PIECE OF INVENTORIAL EQUIPMENT

When adding at least $5,000 in value to an existing piece(s) of inventorial equipment, to upgrade it and increase its functioning, the following data fields should be completed:

a. **Inventory Equipment?** – YES

b. **Add-On to Property No.** – enter the property number of the existing piece of equipment; if add-ons are being made to more than one piece of equipment, create a line item for each, since only one property number can be referenced (alternatively, you can provide the details in a COMMENT)

The remaining fields are not required, but it is a good idea to complete them:

c. **Custody Code** – if not the one associated with the add-on property number, we will follow up with you

d. **Title Vests With?** – if not the one associated with the add-on property number, we will follow up with you

e. **Location** – if not the one associated with the add-on property number, we will follow up with you – perhaps this is the current location and the one recorded in the system is out-of-date

![Equipment Management](image-url)
3. **TRADE-IN**

When trading in a piece(s) of existing inventorial equipment for a credit toward the purchase of a new piece(s) of inventorial equipment, the following data fields should be completed, in addition to those related to the new item(s) being purchased and discussed above:

a. **Trade-In?** – YES

b. **Trade-In Value** – amount of the trade-in credit being given by the vendor (since it is difficult for Gateway to record trade-ins, this information is helpful for Equipment Management, Purchasing and Accounts Payable)

c. **Trade-In Property No.** – enter the property number of the piece(s) of equipment that is being traded in; if more than one piece of equipment is being traded in, the best way to reference them is via a COMMENT

---

![Equipment Management Form](image_url)
4. **FIRST ORDER FOR A NEW FABRICATION, OR ONE THAT DOES NOT YET HAVE A PROPERTY NUMBER**

When placing an initial order for a new fabrication, or an order for a fabrication that does not yet have a property number because its value has not yet reached $5,000, the following data fields should be completed, in addition to those related to the new item(s) being purchased and discussed above:

a. **Fabrication?** – YES

b. **Fabrication Name** – if too long for the field, the full name can be entered via a COMMENT

c. **Fabrication ID. No.** – this is not the same as a property number; it is a tracking number assigned by Equipment Management in a separate Fabrications Tracking Database, consisting of the year in which the fabrication began and a sequential number (before beginning a fabrication, the department should always consult with Equipment Management, provide details of the fabrication, and obtain this number)
5. ORDER FOR A FABRICATION THAT HAS A PROPERTY NUMBER

When placing an order for a fabrication that has a property number, the following data fields should be completed, in addition to those related to the new item(s) being purchased and discussed above:

a. Fabrication? – YES

b. Fabrication Name – if too long for the field, the full name can be entered via a COMMENT (but this is not really necessary, since the property number will identify it with the full description)

c. Fabrication Property No. – property number assigned by Equipment Management to the fabrication

d. Fabrication ID. No. – optional, since the property number is the primary reference for identifying the fabrication and processing an increase to its value