



# Search for a Custodian Inventory Request – Criteria

## Overview

The Property Accountability module Request Custodian Inventory process provides the ability to request a custodian inventory.

This process is used for both manual and automated inventories. Requesting a Custodian Inventory allows the inventorying of one or more Major Custodians. When an inventory is initialized, an Inventory Number is created to track the inventory from “cradle to grave” for managing purposes.

### Note



Some fields provide **Intellisense**, which is the automatic completion of a field entry in a software application.

The application displays a selectable word or phrase in that field, based on the input (that was previously entered), without having to completely type the entry.

## Navigation

Inventory > Generate Inventory > Custodian > Request Custodian Inventory Search Criteria page

## Procedures

### Search for a Custodian Inventory Request – Criteria

*One or more of the Search Criteria fields can be entered to isolate the results. By default, all results are displayed. Selecting  at any point of this procedure returns all fields to the default "All" setting.*

1. In the Search Criteria panel, narrow the results by entering one or more of the following optional fields.





Search Criteria

*i* Maj Custodian Nbr

Include Sub Cust

Next Inittzn Dt From

Next Inittzn Dt To

2. Select . The **Request Custodian Inventory Search Results** page appears.





## Search for a Custodian Inventory Request – Results

### Navigation

Inventory > Generate Inventory > Custodian > Search Criteria >  > Request Custodian Inventory Search Results page

### Procedures

#### Search for a Custodian Inventory Request – Results

Selecting  at any point of this procedure removes all revisions and closes the page.

Selecting  deselects the checked entries. Selecting  selects all present entries.

1. Select . The **Request Custodian Inventory Search Results** page appears.

Select	Cust Nbr	Last Inv Dt	Next Initzn Dt
<input type="checkbox"/>	BPG123		
<input type="checkbox"/>	BPG456		
<input type="checkbox"/>	LN0411		
<input type="checkbox"/>	NL2204		
<input type="checkbox"/>	NLTEST		
<input type="checkbox"/>	STRIK2		
<input type="checkbox"/>	STRIK2 TEST56		
<input type="checkbox"/>	STRIKE		
<input type="checkbox"/>	STRIKE TEST30		

2. Select  on the desired row(s).  appears, indicating the row(s) is selected.





### Note



LAST INV DT and NEXT INIT DT do not display if there is no Custodian Inventory Plan for the UIC. Contact the Agency Coordinator if no plan exists for the UIC.

3. Select . The **Request Custodian Inventory Request Selected Rows** page appears.





## View the Selected Custodian Inventory Rows

### Navigation

Inventory > Generate Inventory > Custodian > Search Criteria >  > Search Results >  (desired record) >  > Request Custodian Inventory Selected Rows page

### Procedures

#### View the Selected Custodian Inventory Rows

Selecting  at any point of this procedure removes all revisions and closes the page.

1. Select . The **Request Custodian Inventory Selected Row** page appears.

Selected Rows		
Cust Nbr	Last Inv Dt	Next Inltzn Dt
STRIK2 TEST56		

2. Select . The **Request Custodian Inventory Update** page appears.





## Update a Custodian Inventory Request

### Navigation

Inventory > Generate Inventory > Custodian > Search Criteria >  > *VARIOUS PROCEDURAL STEPS* > Request Custodian Inventory Update page

### Procedures

Selecting  at any point of this procedure removes all revisions and closes the page. **Bold** numbered steps are required.

1. Select . The **Request Custodian Inventory Update** page appears.
2. Complete the Update grid.

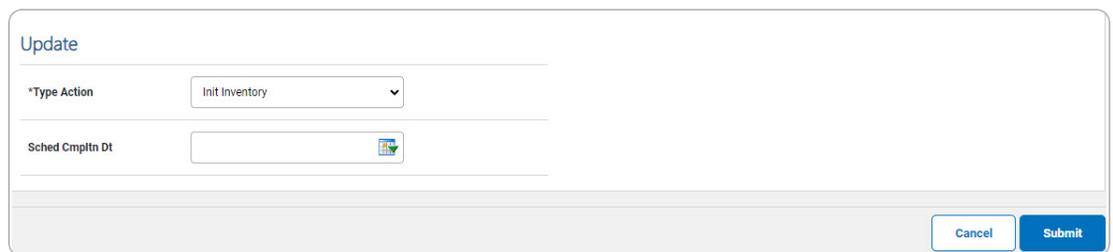
A. Use  to select the Type Action.

**Helpful Tip**

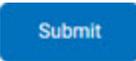


All fields on the page are required.

- Init Inventory



The screenshot shows a form titled "Update". It has two main input fields: "\*Type Action" with a dropdown menu currently showing "Init Inventory", and "Sched Cmpltn Dt" with a date picker icon. At the bottom right of the form are "Cancel" and "Submit" buttons.

- a. Update the SCHED CMLPTN DT, using  or entering the date (MM/DD/YYYY) in the field provided.
  - b. Select . The **Request Custodian Inventory Transaction Status** page appears.
- Init Inventory and Gen Report





Update

\*Type Action

Sort Seq

Sched Cmpltn Dt

Signature Block

- a. Update the Sort Seq, using to select the desired sort sequence.
  - b. Update the SCHED CMLPTN DT, using or entering the date (MM/DD/YYYY) in the field provided.
  - c. Update the Signature Block, using to browse for the revised signature. *This is a 64 alphanumeric character field.*
  - d. Select . The **Request Custodian Inventory Transaction Status** page appears.
- Init Inventory and Gen Report Cond

Update

\*Type Action

Sort Seq

Sched Cmpltn Dt

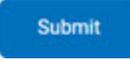
Signature Block

- a. Update the Sort Seq, using to select the desired sort sequence.
- b. Update the SCHED CMLPTN DT, using or entering the date (MM/DD/YYYY) in the field provided.
- c. Update the Signature Block, using to browse for the revised signature. *This is a 64 alphanumeric character field.*





## Help Reference Guide

- d. Update the NEXT INITZN DT, using  or entering the date (MM/DD/YYYY) in the field provided.
- e. Select . The **Request Custodian Inventory Transaction Status** page appears.

### Note



Inventory is now in *Open Initialized (OIN)* status.

