Search for a Custom Inventory Request — Criteria

Overview

The Property Accountability module Request Custom Inventory process provides the ability to create an inventory or inquiry based on specified Search Criteria requirements. As the Custom inventory is created, a real-time record count displays at the top of the page.

Navigation

Inventory > Generate Inventory > Custom > Request Custom Inventory Search Criteria page

Procedures

Search for a Custom 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 [Reset] *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

Available Field(s)	Available Value(s)	Selected Value(s)	Record Cnt: 462
Asset Id	Select an Item	ABC123;6144903122	2
Select an Item			

Alternate Search Criteria

Reset   Search

Helpful Tip

Use "wildcard characters" (percent sign [%], greater than [>] or less than [<] symbols) to refine the search. For example, if *Item Description* is selected in the Available Field(s) and *%LAPTOP%* is entered in the Selected Value(s) field, the process retrieves all records with the word *LAPTOP* in any part of the Item Description.

Attention

As selections are made, a running count of Search Results display in the Record Count. This represents the total number of assets that are accessible for inventory or inquiry. As specific values are selected, the Record Count shows how many assets meet the criteria.

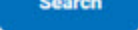2. Select [Alternate Search Criteria]. *An Alternate Search Criteria grid appears.*

3. Select [Remove Above Criteria]. *The Above Search Criteria grid is removed and not included in the Search Criteria.*

4. Select [Search]. *The **Request Custom Inventory Search Results** page appears.*

Search for a Custom Inventory Request — Results

Navigation

Procedures

Selecting [Cancel] *at any point of this procedure removes all revisions and closes the page.*
Selecting [Deselect All] *deselects the checked entries. Selecting* [Select All] *selects all present entries.*

Search for a Custom Inventory Request — Results

1. Select [Search]. *The **Request Custom Inventory Search Results** page appears.*

    ### Search Criteria
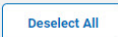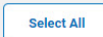
    ▼ Criteria

Available selections are: Stock Nbr is equal to 2310000000789

    Search Results   Number to Display [10 ▾]

Select	Asset Id	Stock Nbr	Serial Nbr	Custodian Nbr	Asset Level Cd	Loc	Item Desc	Pilferable	Deprn Cd	Lot Nbr	Last Inv Dt	Rcl Lst Inv Dt	Loan Cd	Lease Cd	Mfr Name
☐	111111100009	2310000000789	564684666	123456 654321	EI	15 S 30TH ST REAR U	FAST CAR	No	T		07/12/2023	07/12/2023	G	G	BLUE DIAMOND

    [Cancel] [Deselect All] [Select All] [Continue]

2. Select ☐ on the desired row(s). ☑ *appears, indicting the row(s) is selected.*

Note

Use the *Number to Display* drop-down list to display more or less rows per page. The options are from as little as *5* rows to *All* rows.

3. Select [Continue] . *The Request Custom Inventory Request Update page appears.*
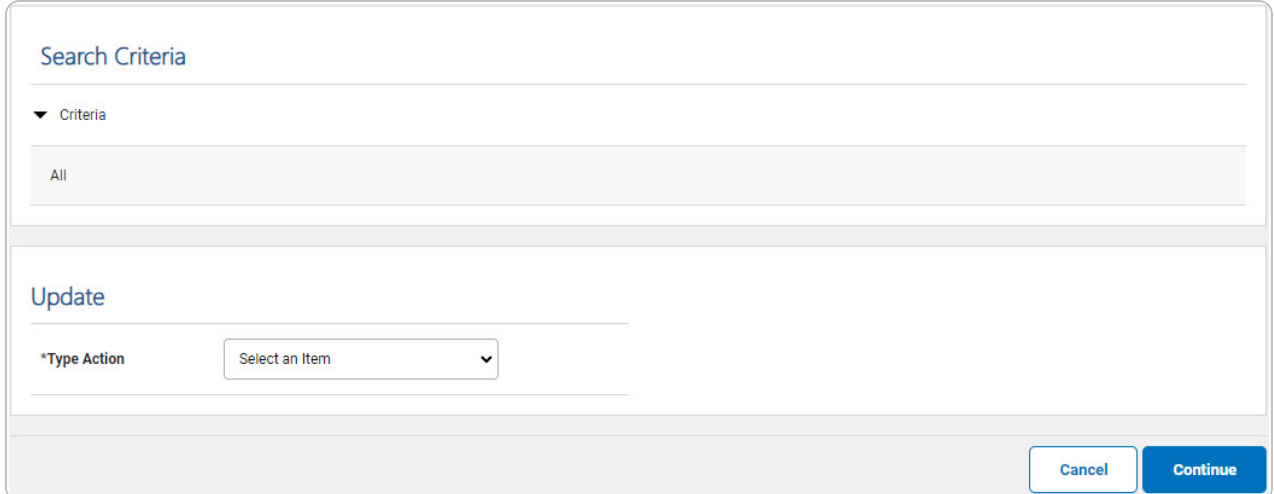
Update a Custom Inventory Request

Navigation

Inventory > Generate Inventory > Custom > Search Criteria > **Search** > Search Results > ☐ (desired record) > **Continue** > Request Custom Inventory Update page

Procedures

Update a Custom Inventory Request

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

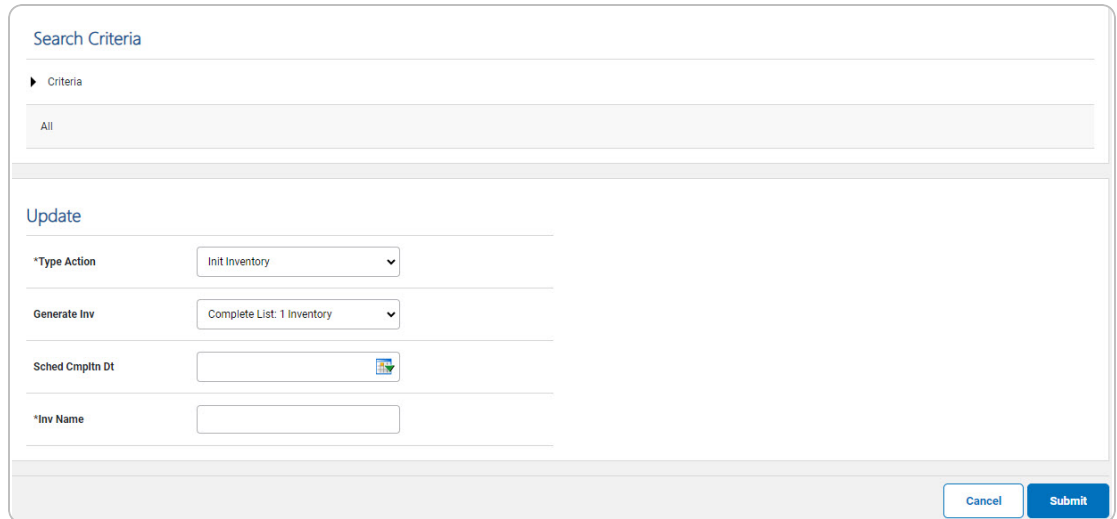1. Select **Continue** . *The* **Request Custom Inventory Update** *page appears.*

2. *Verify the Search Criteria grid.*
3. *Complete the Update grid.*

A. Use ⌄ to select the Type Action.

- Init Inventory

Search Criteria

▸ Criteria

All

Update

*Type Action	Init Inventory
Generate Inv	Complete List: 1 Inventory
Sched Cmpltn Dt	
*Inv Name	

Cancel Submit

a. Update the INV NAME, entering the revised name in the field provided. *This is a 50 alphanumeric character field.*

b. Select Submit. *The **Request Custom Inventory Transaction Status** page appears.*

- Init Inventory and Gen Report

Search Criteria

▶ Criteria

All

Update

*Type Action	Init Inventory and Gen Report ⌄
*Report Sort Seq	Asset Id ⌄
Signature Block	Agy Cd D2: Other (Default) 🔍
Generate Inv	Complete List: 1 Inventory ⌄
Sched Cmpltn Dt	[ ] 📅
*Inv Name	[ ]
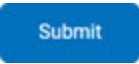
Cancel   **Submit**

a. Update the Report Sort Seq, using ⌄ to select the desired sort sequence.

b. Update the INV NAME, entering the revised name in the field provided. *This is a 50 alphanumeric character field.*

c. Select **Submit**. *The* **Request Custom Inventory Transaction Status** *page appears.*

• Inquiry Process

Search Criteria

▼ Criteria

All

Update

*Type Action   Inquiry Process ▼

Cancel   Continue

a.   Select **Continue** . *The **Asset Inventory Inquiry Field Selection** page appears.*