

Search For a Custodian — Criteria

Overview

The Property Accountability module Custodian process provides the ability to manage individuals assigned as being responsible for property assets for a specific area. The Custodian Search Criteria page begins the process and provides means to search for existing Custodian Number records and create new records.

When creating a new Custodian Number record, be sure to adhere to the following rules:

- Use up to 6 alphanumeric characters for a MAJ CUSTODIAN NBR.
- Use up to 6 alphanumeric characters for a SUB CUSTODIAN NBR.
- Do not use with a space or special character.
- At least one character must be used.
- If LIN/TAMCN authorizations are available for the UIC, users have the option to assign/unassign Paragraph Numbers to the Custodian.
- A MAJ CUSTODIAN NBR must be created before a SUB CUSTODIAN NBR.
- When adding a Maj Custodian NBR, select the Transfer Authority ✓ to grant the Custodian the authority to transfer items.

Navigation

Asset Management > Custodian > Search Criteria

Procedures

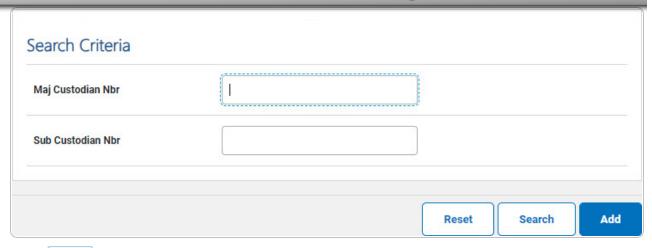
Search for an Existing Custodian

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 box, narrow the results by entering one of the following optional fields.







2. Click Search . The Custodian Search Results page appears.

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Add a Custodian

Navigation

Asset Management > Custodian > Search Criteria > Custodian Add page

Procedures

Add a Maj Custodian NBR or Sub Custodian NBR



1. Select . The **Custodian Add** page appears.

| BPG123 | |
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| Select an Item | |
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| | Cancel |



- **2.** Enter the Custodian Name in the field provided. *This is a 50 alphanumeric character field.*
- **3.** Use to select the State.
- **4.** Enter the ZIP CD in the field provided. *This is a 10 alphanumeric character field*.
- **5.** Use to select the Country Cd. The default is set at "US-UNITED STATES OF AMERICA".
- 6. Click the Para NBR tab to advance to the Para Nbr tab. This step is for Logistic Programs using Para NBR Authorizations only.
- 7. Select . The **Custodian Transaction Status** page appears.



Update a Custodian

Navigation

Asset Management > Custodian > Search Criteria > Search Results page > Update hyperlink > Custodian Update page

Procedures

Update a Maj Custodian NBR or Sub Custodian NBR





1. Select the Update hyperlink. The **Custodian Update** page appears.

| Custodian Nbr | BPG123 | |
|-----------------|-------------------------------|--|
| Custodian NDF | BF0123 | |
| *Custodian Name | PIDGE GROCE | |
| Address 1 | 4530 LENA AVE | |
| Address 2 | | |
| City | MECHANICSBURG | |
| *State | PA-Pennsylvania 🕶 | |
| *Zip Cd | 17055 | |
| *Country Cd | US-UNITED STATES OF AMERICA 🔻 | |
| Phone Nbr | (717) 555-1212 | |
| DSN | 555-1212 | |
| FAX Nbr | | |
| E-Mail Address | | |





| History Remarks | | | |
|--------------------|-----------|---|--|
| Remarks | BPG TEST | | |
| Alt Order Dt | | | |
| Alt Phone Nbr | | | |
| Alt Custodian Name | | | |
| Transfer Authority | | | |
| Sub Loc | | | |
| Loc | BPG123 | Q | |
| Order Dt | 9/18/2023 | | |
| Office Name | | | |
| Office Id | | | |



- **2.** Update the Custodian Name, entering the revised identifier in the field provided. *This is a 50 alphanumeric character field.*
- **3.** Update the State, using to select the desired place.
- **4.** Update the ZIP CD, entering the revised identifier in the field provided. *This is a 10 alphanumeric character field.*
- **5.** Update the Country Cd, using to select the desired place.
- 6. Verify the Transfer Authority contains the appropriate \square or \square . This grants authority to the Custodian.
- 7. Click the Para NBR tab to advance to the Para Nbr tab. *This step is for Logistic Programs using Para NBR Authorizations only.*
- 8. Select Update . The Custodian Transaction Status page appears.





Add a Custodian Paragraph Number

Navigation

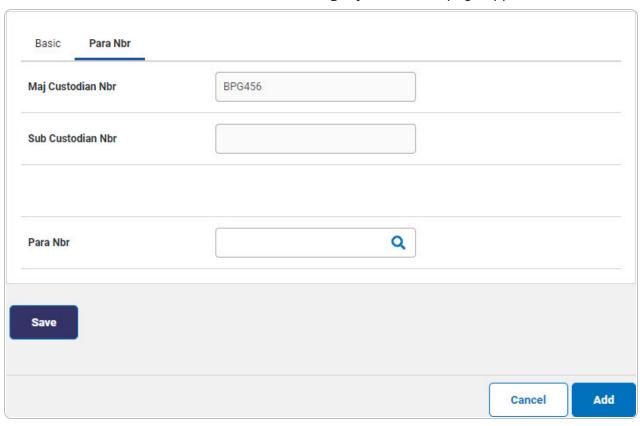
Asset Management > Custodian > Search Criteria > Add Custodian page > PARA NBR tab > Paragraph Number page

Procedures

Add a Paragraph Number(s) to a Custodian

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

1. Select the PARA NBR tab. The Custodian Paragraph Number page appears.





- 2. Enter the PARA NBR, or use \(\frac{Q}{2} \) to browse and select the desired number. This is a 4 alphanumeric character field.
- 3. Select to save the PARA NBR to the record. The saved PARA NBR appears below.

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- 4. Repeat Steps 2 and 3 to add more PARA NBR entries to the CUSTODIAN NBR record.
- 5. Select . The **Custodian Transaction Status** page appears.



Update a Custodian Paragraph Number

Navigation

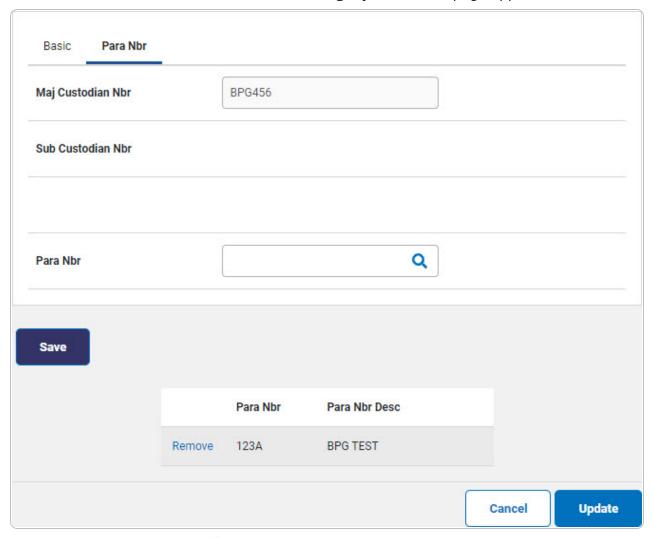
Asset Management > Custodian > Search Criteria > Search Results page > Update hyperlink > Custodian Update page > PARA NBR tab

Procedures

Update a Paragraph Number(s) for a Custodian

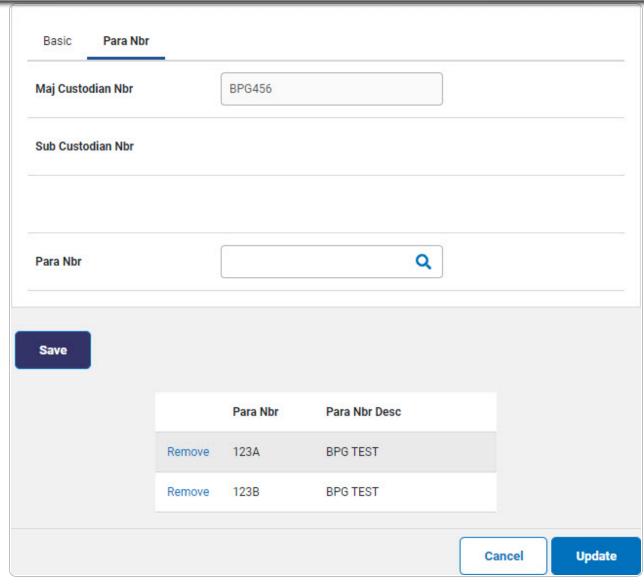


1. Select the PARA NBR tab. The Custodian Paragraph Number page appears.



- 2. Enter the PARA NBR, or use \(\frac{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\ti}\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\texi}\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\text{\tex{
- 3. Select to save the PARA NBR to the record. The saved PARA NBR appears below.





- 4. Repeat Steps 2 and 3 to add more PARA NBR entries to the CUSTODIAN NBR record.
- 5. Select . The **Custodian Transaction Status** page appears.



Delete a Custodian Paragraph Number

Navigation

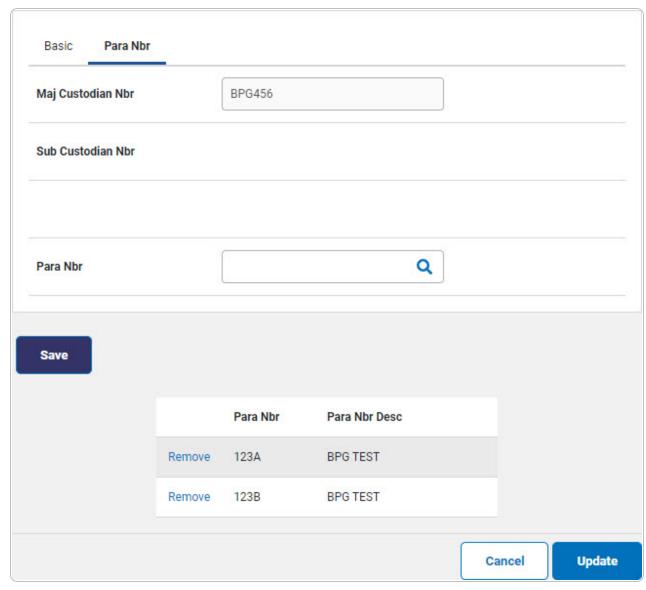
Asset Management > Custodian > Search Criteria > Search Results page > Update hyperlink > Custodian Update page > PARA NBR tab

Procedures

Delete a Paragraph Number(s) from a Custodian

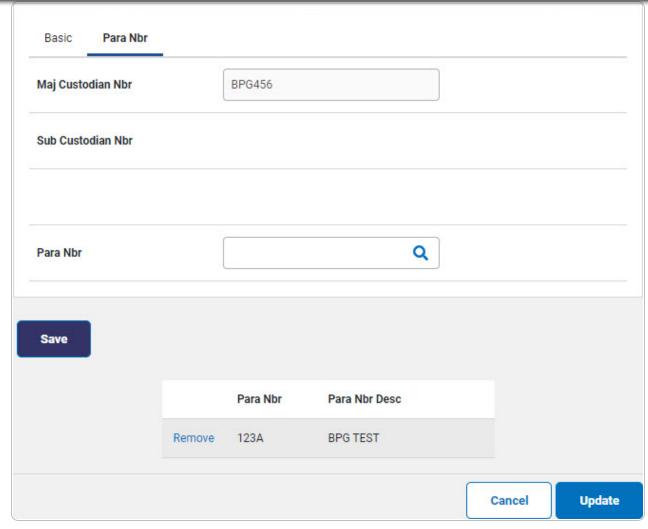


1. Select the PARA NBR tab. The Custodian Paragraph Number page appears.



2. Select the Remove hyperlink. The PARA NBR is removed from the Custodian.





- 3. Repeat Step 2 to remove more PARA NBR entries.
- 4. Select Update . The Custodian Transaction Status page appears.



Delete a Custodian

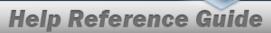
Navigation

Asset Management > Custodian > Search Criteria > Search Results > Delete hyperlink > Custodian Delete page

Procedures

Delete a Custodian Record





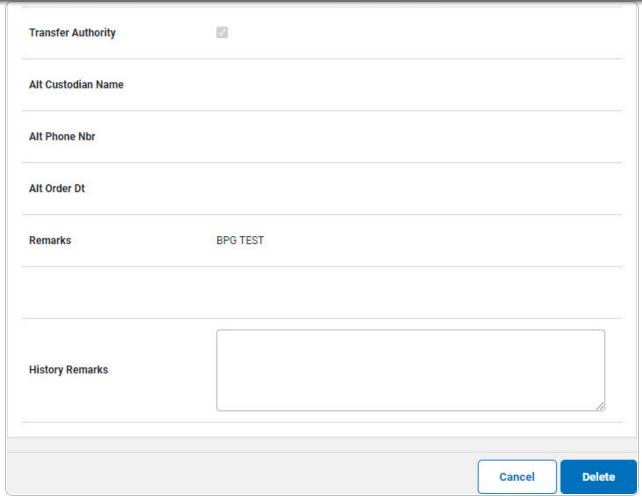
1. Select the Delete hyperlink. The **Custodian Delete** page appears.

| To complete delete action, select Delete; otherwise, select Cancel This will delete the Mjr Custodian and all the Sub Custodian(s) | | |
|------------------------------------------------------------------------------------------------------------------------------------|---------------|--|
| Delete | | |
| Custodian Nbr | BPG123 | |
| *Custodian Name | PIDGE GROCE | |
| Address 1 | 4530 LENA AVE | |
| Address 2 | | |
| City | MECHANICSBURG | |
| State | Pennsylvania | |
| Zip Cd | 17055 | |



| Country Cd | UNITED STATES OF AMERICA |
|----------------|--------------------------|
| Phone Nbr | (717) 555-1212 |
| DSN | 555-1212 |
| FAX Nbr | |
| E-Mail Address | |
| Office Id | |
| Office Name | |
| Order Dt | 9/18/2023 |
| Loc | BPG123 |
| Sub Loc | |





- **2.** Verify the Custodian Name.
- **3.** Verify the State.
- **4.** Verify the ZIP CD.
- **5.** Verify the Country Cd.
- 6. Select Delete . The Custodian Transaction Status page appears.

