Search for an Inventory Management Plan — Criteria

Overview

The Property Accountability module Inventory Management Plan Update process provides the ability to manage an Inventory Management Plan.

The Inventory Management Plan is created by the Agency Coordinator. DPAS stores inventory management plans at three levels:

- **Agency** – Highest level. Controls the ability to set parameters at all levels: Agency, ACTBL UIC, and UIC.
- **ACTBL UIC** – Level below Agency. Controls the ability to set parameters at the ACTBL UIC and UIC levels. This is an administrative level only. Assets do not exist at this level.
- **UIC** – Lowest level, below ACTBL UIC. Physical assets and their associated information reside at this level.

There are two types of Inventory Management Plans:

- **General** – Non-sensitive Plant, Property and Equipment (PP&E) assets.
- **Sensitive** – Assets that require special control and accountability.

The Inventory Management Plan is modified before the designated End Date. Modifying an existing plan may result in changes to the inventory dates.

> **Note**
>
> Attempting to initialize an inventory prior to the establishment of the plan prompts the error message: *No Inv Plan for UIC Cannot generate Inv* to display. Contact the Agency Coordinator to setup an Inventory Management Plan.

Navigation

Inventory > INV MGT Plan > Inventory Management Plan Update Search Criteria page

Procedures

Search for an Inventory Management Plan — 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

Level	Agency	⌄
Type	General	⌄

   [Reset] [Search]

2. Select [Search]. *The **Inventory Management Plan Update Search Results** page appears.*

> **Helpful Tip**
>
> DoD directives state that a sensitive inventory must be completed annually. Sensitive items on such an inventory are designated by certain CIIC (Controlled Item Inventory Code) and Pilferable Codes.
>
> Please refer to glossary terms for further guidance. Sensitive items require storage, shipment, and safeguarding sensitive inventory items, controlled substances and pilferable items of supply.
>
> Refer to DoD Instruction 5000.64, *Accountability and Management of DoD-Owned Equipment and Other Accountable Property*, November 2, 2006.
> http://www.dtic.mil/whs/directives/corres/html/500064.htm.

Search for an Inventory Management Plan — Results

Navigation

Inventory > INV MGT Plan > Search Criteria > **Search** > Inventory Management Plan Update Search Results page

Procedures

Search for an Inventory Management Plan — Results

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

1. Select **Search** . *The* **Inventory Management Plan Update Search Results** *page appears.*

Search Criteria		
Level	**Type**	
UIC	GEN	

Search Results			
Update	**UIC**	**Updtd By**	**Updtd Dt**
Update	BROOKS	NMLAW	10/13/2023 2:40:19 PM

   Cancel

2. Select the Update hyperlink. *The* **Inventory Management Plan Update** *page appears.*

Update the Inventory Management Plan

Navigation

Inventory > INV MGT Plan > Search Criteria > **Search** > Search Results > Update hyper-link > Inventory Management Plan Update page

Procedures

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

1. Select the Update hyperlink. *The **Inventory Management Plan Update** page appears.*

Search Criteria

Level	Type	
UIC	GEN	BROOKS

Plan Data

Level	UIC
Type	GEN
Include Sub Cust	Include Sub Custodian Numbers ▾
*Inv Type	Cyclic By Custodian ▾
Include Non-Actbl	☑
*Start Dt	1/1/2021
Inv by Maint	N-No Inv by Maint ▾
*Mnths in Plan	12
Invs in Period	12
Last Cmpltd Cyc Inv	0

Cancel Update

2. *Verify the Search Criteria grid.*
3. *Update the Plan Data grid.*

- Agency General

Plan Data

Level	AGENCY
Type	GEN
Include Sub Cust	Defer Selection of Sub Custodian N ▾
*Inv Type	Defer to Lower Level ▾
Include Non-Actbl	☑
*Start Dt	1/1/2021 📅
Inv by Maint	D-Defer to Lower level ▾
*Mnths in Plan	12
Invs in Period	0

Cancel   **Update**

A. Update the INV TYPE, using ⌄ to select the desired type.

B. Update the START DT, using 📅 or entering the date (MM/DD/YYYY) in the field provided.

> **Note**
>
> ❓ Changing the Start Date begins a new plan and replaces the existing plan.

C. Enter the MNTHS in Plan in the field provided. *This is a 2 numeric character field.*

- Agency Sensitive

Plan Data

Level	AGENCY
Type	SEN
Include Sub Cust	Defer Selection of Sub Custodian N ⌄
*Inv Type	Sensitive
Include Pilferable	☐
*Start Dt	11/1/2022 📅
*Mnths in Plan	10

Cancel   Update

A. *Verify the INV TYPE.*

B. Update the START DT, using 📅 or entering the date (MM/DD/YYYY) in the field provided.

> **Note**
>
> (?) Changing the Start Date begins a new plan and replaces the existing plan.

C. Enter the MNTHS in Plan in the field provided. *This is a 2 numeric character field.*

- Actbl UIC General

Plan Data

Level	ACTBL UIC
Type	GEN
Include Sub Cust	Defer Selection of Sub Custodian N ▾
*Inv Type	Defer to Lower Level ▾
Include Non-Actbl	☑
*Start Dt	1/1/2021
Inv by Maint	D-Defer to Lower level ▾
*Mnths in Plan	12
Invs in Period	0

Cancel   Update

A.   Update the INV TYPE, using ⌄ to select the desired type.

B.   *Verify the START DT.*

C.   *Verify the MNTHS in Plan.*

- Actbl UIC Sensitive

Plan Data

Level	ACTBL UIC
Type	SEN
Include Sub Cust	Include Sub Custodian Numbers ▾
*Inv Type	Sensitive
Include Pilferable	☑
*Start Dt	11/1/2022
*Mnths in Plan	10

Cancel   Update

A.   *Verify the INV TYPE.*

- UIC General

Plan Data

Level	UIC
Type	GEN
Include Sub Cust	Include Sub Custodian Numbers ▾
***Inv Type**	Cyclic By Custodian ▾
Include Non-Actbl	☑
***Start Dt**	1/1/2021 📅
Inv by Maint	N-No Inv by Maint ▾
***Mnths in Plan**	12
Invs in Period	12
Last Cmpltd Cyc Inv	0

Cancel   Update

A. Update the INV TYPE, using ▾ to select the desired type.

B. *Verify the START DT.*

C. *Verify the MNTHS in Plan.*

- UIC Sensitive

Plan Data

Level	UIC
Type	SEN
Include Sub Cust	Include Sub Custodian Numbers
***Inv Type**	Sensitive
Include Pilferable	☑
***Start Dt**	11/1/2022 📅
***Mnths in Plan**	10
Last Cmpltd Cyc Inv	0

Cancel   Update

A. *Verify the INV TYPE.*

B. *Verify the START DT.*

C. *Verify the MNTHS in Plan.*

4. Select Update . *The* **Inventory Management Plan Update Transaction Status** *page appears.*