



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 search fields provide **Intellisense** *i*, 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.

This is identified by a lowercase italic *i* preceding the field name.

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.





Help Reference Guide

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.

Search Results

Select	Cust Nbr	Last Inv Dt	Next Inittzn 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.



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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.


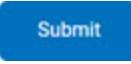
- Init Inventory

Update

*Type Action

Sched Cmpltn Dt

- a. Update the SCHED CMPLTN 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:

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




Update

*Type Action:

Sort Seq:


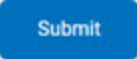
Sched Cmpltn Dt:

Signature Block:

- Update the Sort Seq, using  to select the desired sort sequence.
- Update the SCHED CMLPTN DT, using  or entering the date (MM/DD/YYYY) in the field provided.
- 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.

