

Property Management Report System Training

Hello and Welcome to the property management report system training. I'll be walking you through steps to create property management reports approve them and review them. So basically you'll be starting off with. New property or existing property and you should have the backup information and everything.

You need in order to get started so I'll be using some test data for today. But when the new system comes life, you will be using your real data. So first we'll start off as a unit custodian and I will just kind of show you around the system in general, so in the header. You have the home button that you can always return to an that shows you the roles that you're assigned to in the system.

And it also lists your open task so anything that's in your open tasks are things that are pending action by you. And there's different things you can do you can filter these items you can sort? And yeah, there's a lot of different options, you have here on the dashboard. You have your create button which is available for unit custodians and property delegates to create a property management report PMR.

There is search, which I will show you a little later. And the report function which I will also show you later. So first let's get started with creating. So we click the create button. That'll take us to the PMR report page in which we create anyone and there's different actions. You can request so the default is to request for a new property decal but I'll just click this action type real quick and show you the rest of the options. So we'll be walking through each of these today, so we have centralized Purchase.

Duplicate decal property update request for new decal trade in and transfer. OK so you should be starting off with information your real information that you have for test results for today.

I'm using some test data. So we'll put in our project ID.

Yes, Project ID is required on new pieces of property. It is essential information that provides how Project cost is tracked.

Financial Project Number needs to be placed either in the Project or Title Field in FLAIR. (Project information can be found on PO, Project Cost Management System, Work Program Administration System, etc.) If your item was not purchased using a direct project number, please use your district overhead number.

And as you can see as I'm typing. It provides a typeahead drop down to make it easier to select. Same thing for the object code.

Class code.

Class Code is used to identify the type of property and its estimated useful life. A SharePoint link with a list of valid codes is available on the resources page.

And the acquisition doc number is actually going to be either. Your purchase order number or your invoice number so in this case, we're putting our purchase order number?

The serial number is the serial number of the property.

Our acquisition cost. Manufacturer.

Are received a? And then an item description.

OK, so once we have all our information in there for the first page. We will continue to originate Ng and receiving offices.

So then we need to fill out our originate Ng

Office information you'll notice the organization code provides a drop down box. So it will only list organization codes that you are assigned to in the system.

So you'll select the appropriate organization code.

And that will automatically populate your CID number.

Will put in our account code on the account code can be found on your purchase orders invoices voucher.

It's a really long digit number.

But that information can be found in your supporting documentation, so it is important that the unit custodians become familiar with looking at the information on your supporting documents so that you can input that here.

And I would recommend if you have.

You know several account codes that your Department uses maybe

create kind of a CHEAT SHEET. List of your most commonly used ones you're not having to type all this information out every time. You can see it is quite lengthy, but once you put in that account code. It does populate your category and category you're automatically.

The Account Code is the Purchasing Fund / Current Use fund. It can be found on Purchase Orders, Vouchers, or Invoices tied to the purchase of the property. It is the Unit Custodian's responsibility to obtain this information and the PMR cannot be submitted without it.

OK so will put in our location code. It automatically populates the information of the person submitting as unit custodian. And we need to put in our property assigned to also known as property unique in flair.

Property Unique needs to reflect a specific format to allow entry into FLAIR: User ID Last Name, First Name (Up to 20 characters) i.e. FI900AD DURANT, ASHLE

NOTE Confidence: 0.9250985

So there's a few different ways, you can use this you can either if you know the person's user ID. You can input that or if you don't know you can also just start typing their name. And that'll come up for you. And then we'll put relevant justification.

Knew purchases boutique house do require supporting documentation. So we'll need to input that information, I will need to add a document. OK. So then will continue to review. And that takes us to the last page. So you can double Check all your information make sure it's correct.

Only the Unit Custodian has the ability to delete the PMR when it is at their level to submit.

And if it is, you have either an option to submit at the top of the page. Or at the bottom. And then the PMR will be routed to the cost center manager. For that organization code that you input.

The cast and manager will receive an email letting them know that they have a PMR to prove. It will have a direct link to that. PMR and they can click that link or they can log in.

To the dashboard and it'll display on their dashboard as something pending for them to approve.

So we will show the cost center manager approval a little later once we get through the rest of these PMR types. OK so we'll move on to the next PMR.

And we will do a duplicate decal this time. So, in this case, we are actually. Pudding in an existing property number. So once you have that property number, you would click on look up. And that will populate all the information from the property master file for that item. So we will continue to the next page.

And same thing here it populates. All that information for you.

And to pick decals nice 'cause it's pretty straightforward.

So really all you have to do here is put

in a justification. And duplicate decals do not require supporting documentation,

so we're good, there and we'll click continue to review.

An submit. And that I wrapped the cost center manager.

OK, so we will move on to the next PMR type.

And this time, we will do a property update.

OK, so very similar to duplicate decal will put in our property number. And a quick look up.

And now it looks a little bit different because we have fields that we could actually change and update.

So you're able to update the project ID class code.

Serial number manufacturer received date an item description.

So we will just make a couple changes here.

Change your serial number. Ann are received a

And we will continue to the next page.

OK, so on this page. We are able to edit the property unique properties signed to you. So we'll leave that the same because there's no changes

needed there, but that is an option. You have and this is the only way that you can update their property. Unique is to use their property.

Update PMR and change this field.

Only the Property Update PMR can be used to update the Property Unique value. If an existing piece of property has in invalid Property Unique, the Unit Custodian must submit a PMR to correct the name.

If you have an invalid Property Unique on a Duplicate Decal/Transfer PMR type, you MUST correct it on a Property Update PMR and wait 24 hours after the PMR is completed to update in FLAIR.

So put in our justification. And property updates do not require supporting documents so we're OK there. And we'll click submit. OK, on to our next PM R Type. OK, so this time, we're going to do is centralized Purchase. So we'll select that option. And we will select are originate Ng Organization Code. So centralized purchases basically combining 2 functions into one to make it easier for you so we're combining a request for a new decal and a transfer into one. PMR type so you're only really having to do the work once. Hey so our project ID.

So it's pretty much the same information you're putting in for a new decal PMR type. And one thing to note is that if you put invalid data. The system will prompt you so if I were to put an incorrect class code or object code or any of these fields. The system would alert me that I have an invalid value. I need to correct and they won't allow me to submit the PMR if I have invalid or missing data. So it's just kind of a nice little fail safe to make sure you put in everything correctly.

OK so we have all our information in. And will continue to the second page. So this page is a little bit different because instead of our originate Ng Office information. We have are receiving office information because this is a centralized purchase so we're purchasing on behalf of another office, so this is going to be our receiving office information were in Pudding.

So as the submitting originate Ng Unit custodian. I'm really only required to put in the organization code. For the receiving office. And the Unit custodian for that receiving office. So you'll select that receiving office unit custodian from the Dropdown.

Please note that this drop down for unit custodian will only appear once you input that organization code up top, so if you have this blank you will not see that drop down. So just make sure you have that receiving office organization code input and then you will see this drop down for unit custodian.

So as the originate Ng Universe to D and that's really all I need to input other than the justification.

However, if you have that information available for the receiving office.

You can go ahead and put that at this time or you can submit and have the receiving office input that information so since I had this information. I'm going to input it now.

And the receiving office can always make changes to this. If they had something different in mind or you put in something incorrect, they can make these changes before it's fully submitted and approved. OK so centralized purchase is required to add a document to you so you need to add your supporting documents here.

And the system will prevent you from submitting the PMR without that supporting documents for the PMR types that require it so the PR types that require supporting documents are the request for new decal.

Centralized purchase and trade-ins and the other 3 do not require basically existing property doesn't need supporting documents. But any new property. We need supporting documents for and you're supporting documents are going to be your purchase orders invoices.

Anything that supports your Purchas. OK, so will submit. OK so next will do you a trade in?

OK so trade-ins are a little bit different you'll see a spot for that previous property number.

So you're going to want to put in the property number of the property that you're trading in.

The trade in amount the allowance. Then the rest of that information.

Further Purchas. OK, so once I have all that information in continue to the next page. And we are selecting the originate Ng Office.

Very similar to the other PM Rs? We always need that account code.

OK so again trade-ins do require supporting documents.

Alright so we'll continue to review.

And submit. And we we will create our last PMR type transfers.

So this is similar to duplicate decals and property update where we're looking up an existing piece of property.

And it is nice that it populates that information for you so last typing.

And this one is no look different so for transfers.
We have both are originate.
Ng office information and are receiving office information.
So the originate Ng Office information.
You'll notice is all greyed out. We can't make any changes to that side,
so it's just kind of informational purposes. And we do need to fill out our receiving office
information so similar to the centralized purchase where the originate
Ng. Submitting unit custodian is only required to put in the
receiving office organization code and the receiving office unit custodian
the same applies here.

So we really are only required the originate Ng side
to put in the receiving or code and unit custodian
so that the PMR knows who to Route 2.
But if we have the rest of the information available,
then that makes it easier on everybody in the receiving
office can still edit that information.
OK, so we've got our receiving or code and once again.

We need to make sure that field is filled out.
Before we can select are receiving unit custodian so do
you make sure to put in the order code first?
Then select our unit custodian.
So one thing to know the account code would be
changing from the originate Ng Office to the receiving office.
But the category and category year as you'll notice are
read only and those transfer over from the originate Ng
Office and remain the same.

So no matter what you change the account code to
the category category year inherits from the originating office and
those will not change. OK, so we've got our justification an we do not
need a supporting document.

So we will continue.
This is actually a good opportunity show invalid code looks
like I typed in something wrong,
there. So yes, the PMR will stop you from submitting with
an invalid code. So we need to make sure to correct that.
We get And once I go to submit that should clear up.
There we go all good. OK so we will submit this.

OK, so those are all the PMR types, the unit custodian would create so now will move on to a cost center manager does within the system so the cost center manager would receive emails. All these PM ours that the unit custodian submitted. So they can click on the link from the email. Or they can come to their dashboard and they can see under their open tasks all the PM Rs that are awaiting approval. Yep, so you'll see in the status originally cost center manager approval pending. So, in order to approve all I need to do is click on the edit button. For the PMR. And this is a good one to show you so once the unit custodian submits a property update PMR.

It will highlight for both the cost center manager and the property delegate, the data that were changed so in this case. The unit custodian change the serial number and the received date so that highlights them for their for them, so they are able to tell.

What changed OK, so after reviewing the cost center manager has the ability to edit any of the information on the PMR so if there was something that was incorrect, they can either edit it themselves and then approve it or.

The cost center managers also have the option to reject a PMR and that will route it back to the unit custodian an it does require that the the cost center manager provide comments as to why they are rejecting so you know just kind of list.

What needs to be corrected in the unit custodian kid get it resubmitted after they make those corrections so in this case. Everything looks good so we will approve the PMR.

Both the Cost Center Manager and Property Delegate can reject a PMR. They must provide comments on why they are rejecting it back to the Unit Custodian. The Unit Custodian can then make corrections and resubmit the PMR for approval.

OK. OK and let's go ahead and approve another one 'cause.

I want to show you a couple different things later. OK, so this is a trade in PMR that the cost center manager is reviewing. Everything looks good so we'll click prove.

OK, so once the cost center manager approves the PMR it will then route to the property delegate for their final approval. So the property delegate, same thing they'll get an email language. Now, some things at their level to be approved. They can click on the link from the email or they can log into the system and there will see on there.

Open task anything that is pending their review so you can see it status property delegate review pending. So we will go ahead and click edit. OK. So one thing we need to. Do here as the property delegate is to edit the property number because. The property number hasn't been assigned.

Once a PMR is approved, the Property Delegate will assign a new Property Decal Number (for New Requests, Centralized Purchases, Trade-ins) and complete the PMR request.

So we can see this information is blank. So it will not allow the property delegate. To approve the PMR if the property number is missing.

So we want to make sure that property number is there. Saving back to review. An proof.

So once the proper delegate approves the PMR. PMR is complete, so at that point, the property delegate would go into flare and make the appropriate updates. There so similar to how it's being done now, with paper form. Where the property delegate is enter things a player? It's the same with PMS except this part is electronic? Instead of the paper but the property delegate still needs to go into flare and make those appropriate changes to the property master file.

OK, so that is pretty much the extent for uni custodians cost center manager zan property delegates so I'll show you a few other features of the system. You have the option to search so before I go into search I will show you A. The 2 search fields you can search by either the PMRS number which as you can see here. It's basically the assigned report ID within the system. Or you can search for the property number, so probably more often than not you're more interested in searching by the property number.

Only Unit Custodians and Property Delegates have the option to create PMRs. Cost Center Managers approve the PMR prior to the Property Delegate reviewing.

So we'll just go to search and I will show you that, so we just copy this.
OK, so for property number.

It will show me all PMR's tied to that property number, so it is a quick way to search.

So the next thing I'll show you is the reports.
So there's different reports that you can use. Status user report completed PM ours, but probably the most useful within the system is this general report.

So you can search by different criteria from here or you can leave it blank and show everything available to you so one thing to note for the reports is that it will only show you PMRs for cost centers that you are assigned to you so you won't be able to see everybody's PMRs.

But just ones that are related to your Department.
So you can search by someone's username and that'll be tied to either the unique custodian cost center manager or property delegate, so if the user is searching for falls into either of those categories of a PMR that so it will show up in the results so if I were just typing my name. I see the time selectable there. And similar to the search page. You can search by PMR number. You can search by property number here, too. You can do start and end date of a PMR if you wanna look at the creation date. Cost. By CID or district number you can search by different action type so if you only wanted to see property update PMRs?

You can also search by status so if you wanted to see things that maybe were sitting at the cost center manager approval level, you can search by that. Last modified by also searches by name so if I wanted to see. Things that I last modified then I just searched my name there. But I want to go ahead and just see. All the PMRs that I'm tied to you for my cost centers so I will just click on show data and grid. You can also choose to export to Excel but I'm just going to show the data for now.

So it does show me everything. And just like the dashboard.
You have options to filter here. So you can filter you can sort so that makes it kind of easy. To pare down your report a little further.
An you can download this to Excel as well. OK so I think that just about covers the basics of the system. We do have some CBT training that we're developing for now.

We just wanted to get something out there,
so you can refer back to you along with the user manual and the quick reference guide and as always, you can ask any of the property team.
Or myself, Sami Rick any questions and so thank you.
Thank you for listening.

Access must be granted within the Property Management Report System (PMRS) to view reports/PMRs. Please note, the reports will only show PMRs for Cost Centers the user has been assigned to.

This concludes the Property Management Report System CBT. Thank you for your time and attention.