

Capital Equipment Ordered Through U Market

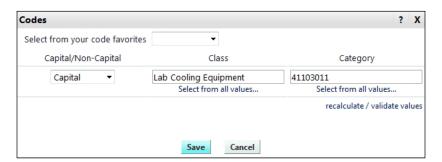
Part 1 of this job aid is intended to be used by U Market Shoppers or Requesters when ordering capital equipment assets through U Market. Part 2 lists the expectations for recording fabricated assets or pieces. Part 3 outlines the steps to properly receive capital equipment assets that are ordered through U Market.

PART 1: ORDERING CAPITAL EQUIPMENT ASSETS IN U MARKET

- 1. Create a Cart in U Market (either through the shopping site or through EFS).
- 2. When shopping is complete, click the cart icon in the upper right hand corner and then click <View My Cart>.



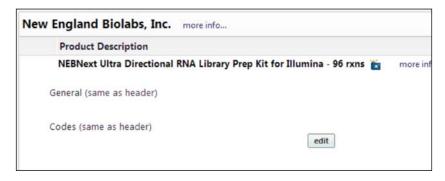
- 3. Click < Proceed to Checkout >.
- 4. Click the **General** tab, scroll down to the **Codes** section, and click <Edit>.
- 5. In the Capital/NonCapital section, select "Capital" from the drop-down menu. Capital equipment assets are defined as equipment that costs \$5,000 (new threshold as of 7/1/13) and above, has a shelf life of more than one year, and is not affixed to a building.



In the **Class** section, select the appropriate Class from the drop-down menu. In the **Category** section, select the appropriate Category from the drop-down menu. These selections will set the EFS Account code for the entire cart. If there are multiple lines in the order and only one is capital equipment, set the Account codes on each line appropriately. Click <Save>.

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6. To change the codes for an individual line, scroll down to the line that needs to be changed and click <Edit>.



7. The codes section for that line will display so the selected codes can be edited.

PART 2:

- 1. For a fabricated item, contact Inventory Services for a capital fabrication or non-capital fabrication number prior to ordering any parts or components.
- 2. Any purchases for items related to a fabrication must have a capital or non-capital fabrication number in the PO line item description.

PART 3: RECEIVING CAPITAL EQUIPMENT ASSETS PURCHASED FROM U MARKET

- 1. Each week a U Market query will be run by U Market Services to identify transactions that include capital equipment assets.
- 2. U Market Services will email a Capital Equipment Asset Receipt Form (UM 1681) and the identified transaction(s) to the appropriate procurement specialist.
- 3. The procurement specialist will gather the information from the Asset Custodian to complete the Capital Equipment Asset Receipt Form.
- 4. The Capital Equipment Asset Receipt Form will be scanned in the cluster into Image Now referencing the voucher number. Procurement specialists will not need to enter any information into EFS for the asset. Voucher specialists will link the asset form to the voucher.
- 5. Inventory Services will review information on the voucher and ImageNow to record the asset.