

Curation Overview

<p>Prerequisites</p> <ul style="list-style-type: none"> • Job Aid: Accessing Your PeopleSoft Asset Management WorkCenter - All Roles • Job Aid: Personalize the Asset Information Page - Curator 	<p>The Asset Information page is used to conduct the Curation process for Capital Equipment. Curation enables personnel assigned by labs to the Curator role to add/edit non-financial searchable information visible to UCSF personnel to aid in communications regarding existing equipment.</p> <p>The following data fields are editable, some of which may be searchable through equipment search pages and or displayed in search results.</p> <ul style="list-style-type: none"> • Equipment Category • Keywords • Suggested Keywords • Manufacturer Name • Manufacturer Part# or Model Name • In a Core • Condition • Photo • Location (access to location will be removed) • Nick Name • Shareable / Contact Information • Self-Use • Lab Name • Core Name
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Curation Details

1 From the Work Area of your WorkCenter that lists Transactions Pending Curation, **Click** the hyperlink of the **Asset ID** or **Tag Number** of the equipment item in the list that you want to perform Curation for.

Business Unit	Asset ID	Description	Tag Number
<input type="checkbox"/> SFCMP	999182001227	microscope	199990021

2 The Asset Information page is opened as a pop-up window overlapping the WorkCenter. Use the scroll bars on the rightside and bottom of the window to view additional information. The popup window can be closed to return back to the WorkCenter by **Clicking** the [x] in the top right hand corner of the window.

Review the equipment information presented in the **Asset Information** page for correctness and update those fields that require changes accordingly.

Commonly updated fields are located in the following sections:

3 **Header:** Nick Name, Curated checkbox. Check the Curated checkbox after you have completed all updates and saved the page. Your name, date and timestamp are saved to the page.

Business Unit: SFCMP Asset ID: 000812002807 Curated
 Tag Number: 12002807 Asset Status: In Service Custodial Review
 Nick Name: _____ Profile ID: E6713 Acquisition Date: 02/01/1982
 Description: CENTRIFUGE, REFRIGERATED Placement Date: 02/01/1982
 Detailed Description: CENTRIFUGE, REFRIGERATED

4 **Asset Structure:** The Equipment Category is assigned at the time of purchase in BearBuy. As part of the Curation process a review should be made to insure there is an alignment between the equipment record and the Equipment Category assigned.

Equipment Category: MIC003 MICROSCOPY Asset Type: Equipment
 Component of: _____ Asset Subtype: CORE
 Tag Number: _____ Work Order Options for Components

A new **Equipment Category** can be assigned to the equipment record by the Curator. Assigning a new Equipment Category will also assign any default asset keywords for the equipment category to the equipment record.

The Component of functionality is discussed under activities performed by those with the Maintenance role.

5 Additional Information: This is the primary section used by Curators to update information that provides important searchable content that is displayed to researchers and others who want to find equipment across campus.

1. **Research** is checked at the time of purchase in BearBuy and indicates that the equipment will be used for research purposes. The Curator can check or uncheck this box
2. **Clinical**, the Curator can uncheck the Research box and check this box to indicate that the equipment will be used for Clinical purposes.
3. **In a Core** is checked at the time of purchase in BearBuy and indicates that the equipment will be part of a Core. The Curator can check or uncheck this box.
4. **Core Name**, enter the name of core the equipment will belong to. This is a free form text field
5. **Lab Name**, enter the name of the lab the equipment will be part of.
6. **Shareable**, indicate if the equipment is shareable for others on campus to use. If this box is checked the Curator must provide a means for contact.
7. **Contact Email**, enter a contact email
8. **Contact URL**, enter a URL if applicable
9. **Available for Self-Use**, indicate if the equipment is available for other to use without assistance.
10. **Age at Acquisition**, this optional field is open to those with the Custodian, Curator or Maintenance role. Enter the age of the purchased equipment. This information is helpful to take into account when reviewing maintenance information.
11. **Exclude from Public Search**, check this box to prevent the equipment information from being displayed in the equipment search page outside of the Asset Management System.

5

Additional Information

Research Curator: SF859205 Elmes, Rebecca S. Exclude from Public Search

Clinical Delegate: Non-Owned Asset

In a Core Core Name: In Physical Use

Shareable Lab Name: Allow Overbooking

Available for Self-Use Contact Email: Contact URL: Age at Acquisition: 0 Equipment Age(Years): 0.00

Curator - Conduct Curation

6 Asset Keywords tab

Click on the Asset Keywords tab to navigate to the keywords page of the equipment record. From this page the Curator can add additional descriptive keywords to the equipment record that may increase searching results by other campus personnel looking for specific equipment.

Asset Information | **Asset Keywords** | Acquisition Information | Asset Image

Business Unit SFCMP Asset ID 999182001227
Tag Number 199990021 Asset Status In Service
Nick Name Profile ID E6300

Any Keywords that are set as a default anytime the Equipment Category is assigned to the equipment record has a keyword source of **Defaulted**

Asset Information | **Asset Keywords** | Acquisition Information | Asset Image

SFCMP Asset ID 999182001227 microscope Tag 199990021 In Service

Asset Keywords

Keyword	Keyword Source	
FLUORESCENCE	Defaulted	+
ZTEST1	Defaulted	+

To add an additional descriptive keyword from the assigned Equipment Category or the Global Keyword pool of all keywords for all categories, **click** the [+] located at the end of the last row. A new row is added with a magnifying glass to look up existing keyword values.

Key Word Detail Personalize Find First 1-3 of 3 Last

Keyword	Keyword Source	
FLUORESCENCE	Defaulted	+
ZTEST1	Defaulted	+
		+

Click the magnifying glass to look up any available keyword values in a pool. Keywords will be noted as Category or Global to indicate the source in the list.

INFRARED	Category
UV	Category
ZTEST1	Category
BIG MACHINE	Global
BLUE LENS	Global

Select a value from the list to assign the descriptive keyword to the equipment record. The Keyword Source will indicate Manual

HIGH SPEED Manual

To enter a **Suggested Keyword** not part of a pool follow **step 6b** to add a new row. Manually enter a descriptive keyword in the text field. You will receive a message as you type that “No Matching Values were Found” because you are entering a new value, you can ignore this message.

Key Word Detail Personalize Find First 1-4 of 4 Last

Keyword	Keyword Source	Approval Status	
FLUORESCENCE	Defaulted		+
ZTEST1	Defaulted		+
HIGH SPEED	Manual		+
POWER SURGE PROTECTION	Suggested	Pending	+

Click Save. A pop up message will ask if you wish to continue? The keyword will require approval. Click Yes. The Suggested Keyword is saved to the equipment record. Keyword Source is Suggested, Approval Status is Pending.

7 Comments: Add comments regarding updates made to equipment information. Click the [+] sign located at the top right corner of the section to add a new comment if a previous comment is present.

Comments Find View All First 1 of 1 Last

Date/Time 05/11/2019 9:30:36PM

Name

Comment

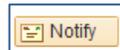
Other Fields updated less commonly

8 Manufacturer Information: Manufacturer Name, Model. Other open fields are optional entry

9 Location: Access to Location changes will be removed. If you need to change the location for the equipment please refer to your Equipment Custodian to make the update in the system..

10 Additional Information Section:
Curator field: This field is used to select a Curator for the equipment after the equipment has passed through to PeopleSoft Asset Management or to change the Current Curator. **Click** the magnifying glass icon to search for an applicable person who has been assigned the Curator role in PeopleSoft.

a Click the Notify Button located at the bottom of the page to manually send an email to the Curator.



b Select the Curator Assignment template. This will include a hyperlink to the equipment in the body of the email.

Description	Subject	Select
CURATOR_ASSIGNMENT	Curator Assignment	Select
CUSTODIAL_DELEGATE	Delegation of Custodial Review	Select

c Follow the instructions at the top and bottom of the notification page to send the email to the Curator. Click OK to send the email

11 Physical and Custom Attributes:
Condition Code: Change the equipment condition. The most current condition of the for the equipment is presented. Other fields are optional.

a Click the [+] sign located at the top right corner of the section to add a new Condition. **Click** the magnifying glass icon to select the appropriate new condition of the equipment from the list.

- E1 Used,Reconditioned &Excellent
- E2 Used,Reconditioned&Good
- E3 Used,Reconditioned&Fair
- E4 Used,Reconditioned&Poor
- N1 New&Excellent
- N2 New&Good