Run the UPL021 – Moveable Asset Inventory Report

Overview: This job aid demonstrates how to run the UPL021 – Moveable Asset Inventory report in Cognos/BI, which is an inventory report used to identify all moveable capital assets within a department.

1. Log in to ebs.msu.edu and click the Business Intelligence and Analytics tile.

2. Open the menu (indicated by four horizontal lines) in the top left corner of the Cognos window.

3. Select Content.

4. Select the Team Content tab.

5. Select the Finance Folder.

If you have any questions, please contact the Capital Asset Management team at (517) 884-6081 or camhelp@msu.edu.
6. Select the Central Finance Reports block.

7. Select the University Procurement and Logistics block and then the UPL Capital Asset Management Reports block.

8. Select the UPL021 Moveable Asset Inventory Report box to display the report lookup options.

9. Within the report lookup page:
   a. Check the A - Active and identifiable and U - Under construction asset statuses.
   b. Ensure the default service date range values, Earliest date and Latest date, are selected.
      i. Note: CAM recommends not changing these values as the defaults will pull all active asset records.
   c. Enter your org code(s) in the keyword search box and click Search.
   d. Select Finish to run the report.

   UPL021-Moveable Asset Inventory

   Select One or More Asset Statuses:
   
   Select an In Service Date Range:
   (Defaults to Current Fiscal Year if nothing selected)
   From: [Input date]
   To: [Input date]

   Keywords: [Input keywords here]

   Search and Select One or More Owner Organizations:

   Select all | Deselect all

   Case Inensitive

   Starts with any of these keys: [Input keys]

   Search and Select prompts only return 200 values, use options to refine search results. Reference reports are available within university wide folders.

   Cancel | Finish
10. To export the data in a secondary format (e.g. PDF or Excel), click the Run as button (right-pointing triangle) in the top left of the report screen and select your preferred format.
   a. **Note:** CAM recommends exporting the report to Excel and sorting by location information (building and room number) for use in the annual asset inventory process.

   ![Run as button](image)

   - Run HTML
   - Run PDF
   - Run Excel
   - Run Excel data
   - Run CSV
   - Run XML
   - Reset prompts and run

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