

# CCART Guidelines

## 1. Introduction

CCART is a site employed by UT to electronically process transfers of inventory and equipment from one unit to another or to surplus inventory. This article provides instructions on how to give a unit receiving a permanent loaner official ownership. Additionally, these steps can be followed to have an asset picked up for surplus. Click here for the [University's official Tutorial](#).

LAITS supported machines deemed surplus should have asset tags documented with a snapshot sent to #Surplus or included in the INC. Asset tags are then added to the surplus master spreadsheet, which is used to generate CCART inventory transfer requests.

## 2. Log into the CCART home page

2.1 Sign in to [CCART Home page](#) on UT Direct by going to: <https://utdirect.utexas.edu/acct/inv/ccart/index.WBX>.

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2.2 Confirm that you are in the correct **Desk**, ATS-INV, and be sure to update the **Fiscal Year** and **Month**.

2.3 Select **Update Authorizations**.

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## 3. Create a new CCART

3.1 From the CCART home page, select **Create CCART**.

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3.2 Enter the **Tag Number(s)** under *Inventory Number*, and the **Unit Code** asset being transferred to under *Transfer all to Unit*. Each CCART has a maximum of 50 entries.

3.3 LAITS - **0780006** is the initial placeholder code for all transferred computer equipment bound for UT Surplus. Most often, you will be **routing machines initially to LAITS (0780006) then to Surplus (4500999)**. It is recommended to NOT select 'special handling' for computers until after the transfer has approved to LAITS and the machine has been verified as wiped.

3.4 Select **Create CCARTS**.

[blocked URL](#) 3.3 The system creates CCARTs based on the owning unit. If you enter multiple asset tags, several CCARTS may be created. Work through each cart in order of entry, starting with **CCART 1**.

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## 4. Edit CCART Details

4.1 Only enter assets in the same location to a CCART, such as SW7 #103 or FAC 21b. To show the current location of assets, select *New Site/Bldg/Floor/Rm*.

CCART Details

Document ID: 50NT1998252

Get Document

Action: Select Action

Perform Action

Status: CREATED

Owner: VOGEL, RYAN K

Transfer from Unit: 5113900 ATS

Transfer To Unit: 0780000 LIB ARTS INSTR TECH SV

Special Handling Required: None

View Element Details

Don't forget to Update Document

Printable Version of Page

New Site/Bldg/Floor/Rm

Use current

Default all to:

Inv Number	Delete	Description	Historical/Depreciated Amount	Current Site/ Bldg/ Floor/ Rm	New Site/ Bldg/ Floor/ Rm
A01981	<input type="checkbox"/>	APPLE MACBOOK PRO 15 INCH	1899.00 / 633.00	0701 10.218	

Comments and/or Non-inventory items to be transferred

CLICK

4.2 Under *Choose a Search Method*, select **Search by Building Abbreviation**.

Enter the **building initials** (ex: NUR, BEL, SEA), then enter the **room number** where the asset is currently located. Select **Begin Search**.

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4.3 Select the Site/Bldg/Floor Room Combination that matches the location you entered. The system should then take you back to the CCART page.

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**CCART Details**

Document ID: SONT199252  
Action: Select Action  
Status: CREATED  
Creator: WOODL, RYAN K  
Transfer From Unit: S113000 ATS  
Transfer To Unit: 0780000 LIB ARTS INSTR TECH SV  
Special Handling Required: None

View Element Details Don't forget to Update Document  
New Site/Bldg/Floor/Rm Use current Default all to: UTM 0418 02 2208

Inv Number	Delete	Description	Historical/ Depreciated Amount	Current Site/ Bldg/ Floor/ Rm	New Site/ Bldg/ Floor/ Rm
AD1981	<input type="checkbox"/>	APPLE MACBOOK PRO 15 INCH	1899.00 / 633.00	0701 10.218	

Comments and/or Non-Inventory Items to be Transferred

4.4. As you return to the CCART page, perform the following actions:

- Select **Default all to** in order for location to change for all machines on the list.
- Then select **Update Document**. You will lose the information if you do not update the document.

4.5 Select **NOTE - Display document Notes** from the Action menu and click on **Perform Action**.

- Add notes such as asset location, contact information, phone number etc.
  - EXAMPLE: The asset is deemed surplus and is currently located in LAITS surplus storage - SW7 #103. Request inventory transfer to LAITS for hard drive processing. Upon completion, the asset will be pending transfer to LAITS. When approved by an admin, the status will change from 'pending' to 'approved'.
- Save Notes and return to the main CCART
- Add the same notes to the visible Commentary section at the bottom of the CCART.
  - EXAMPLE: The asset is deemed surplus and is currently located in LAITS surplus storage - SW7 #103. Request inventory transfer to LAITS for hard drive processing. Upon completion, the asset will be transferred to surplus.
- Select **Update Document**.

4.6 To verify that all is correct on the CCART, select **VER-Verify Document** from the Action menu and click on **Perform Action**.

## 5. Transferring a CCART to LAITS (0780006)

5.1 Under *Action*, select **APR-Approve and route forward**. Then, select **Perform Action**.

5.2 You will see the *CCART status* change to **CCART Proposed**. The status changes to approved after both an owning unit admin and a COLA admin approve the inventory transfer.

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## 6. Transferring a CCART to Surplus (4500999)

6.1 After machines have been verified as wiped, LAITS generates a second set of CCARTS requesting inventory transfer from 0780006 to 4500999.

6.2 On these secondary CCARTS, select **Special Handling 'computer'** and verify the hard drive wipe / removal has been completed.

6.3 Then select **Update Document** to save the information.

6.4 Under *Action*, select **APR-Approve and route forward**. Then, select **Perform Action**. You will see the CCART status change to **CCART Proposed**.

6.5 COLA admins must approve the transfer in order for the inventory to be picked up, but the status will remain as proposed until after the surplus team has picked up and verified the asset tags.

## 7. Rejected Assets on CCARTS

7.1 Assets that are rejected during the CCART process will need to be reinstated by Inventory. Assets that have been retagged will also need to be approved by Inventory prior to being added to a CCART.

- a. Common rejections include MISSING/STOLEN ELEMENTS, INVALID INVENTORY NUMBER, ALREADY IN [CCART Doc ID]
- b. An example rejection page is shown here:

Inventory Number	Transfer to Unit	Special Handling	System Message
835744	4500999	Computer	Missing/Stolen element
837464	4500999	Computer	Missing/Stolen element
820404	4500999	Computer	Missing/Stolen element
815299	4500999	Computer	Missing/Stolen element
835722	4500999	Computer	Invalid inventory number
837347	4500999	Computer	Missing/Stolen element
836280	4500999	Computer	Missing/Stolen element
815296	4500999	Computer	Missing/Stolen element
833916	4500999	Computer	Missing/Stolen element

- c. When assets are rejected, take a screen shot (using **cmd-cntrl-shift-4 on a Mac**; **Shift + Windows Key + S on a PC**) to save for later communications. It will be used within an email to inventory later in the process.
- d. It is best to name the saved screenshot(s) with location and date in order to match with documentation for those rejected items.
  - i. EXAMPLE: FAC21b Rejected Assets1 \_Screenshot 2022-08-29
- e. After saving the screen shot(s), delete the rejected assets, and move on with the CCART process.


7.2 Documentation for Inventory - The information you give to inventory for each asset depends on the rejection.

- a. create a Word document with a two column table and name it to match the screenshot.
  - i. EXAMPLE: FAC21b Rejected Assets1 Documentation \_Screenshot 2022-08-29

7.3 Use CLAIM / DEFINE data along with a photo of the asset tag as proof of inventory possession.


- a. Provide as much information as is available, including asset tag, computer description, serial number, owning unit and current location.

### a. MISSING/STOLEN ELEMENTS

<p>893667</p> <p>MacBook Pro 13" (Retina) (Mar 2015)</p> <p>Serial C02PX0HJFVH4</p> <p>0700000 - SPANISH AND PORTUGUESE</p> <p>Rejection: Missing / Stolen</p> <p>Asset is Currently located in BEL 214F</p>	
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**b. INVALID INVENTORY NUMBER**

- i. If inventory information is not available in CLAIM or DEFINE, add that information to the table.

<p>832232</p> <p>Apple MacMini</p> <p>Serial Number: QP93912J0TJ</p> <p>Owning Unit: Unknown</p> <p>No CLAIM Listing</p> <p>Rejection: Invalid Inventory Number</p> <p>Asset is Currently located in BEL 214F</p>	
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**c. ALREADY IN [CCART Doc ID]**

- i. Check the routing history for the CCART. These items may be 'locked' in a CCART from another department direct to surplus.
1. They may have also checked off that the machine has been wiped, when that may not be the reality.
  2. You may need to reach out to the list of admins and request they delete the specific asset tag or the entire document so that LAITS is able to process it.
  3. If they refuse, we can wipe the machine and deliver it back to an admin. for surplus processing.

### 7.3 Contacting Inventory

- a. After you have compiled as much information as possible on each rejected asset, you will send an email with both the the original screenshots of the rejection and the Word document with documentation to inventory. Their central email intake is [invccart@autism.utexas.edu](mailto:invccart@autism.utexas.edu)
- b. **Sample email template** to INV -

Enclosed are snapshots of several rejected assets in the LAITS surplus storage area in [LOCATION], and the accompanying documentation for that inventory.

I hope that this can support activating the tags, so that our staff can wipe the hard drives and send them the devices to surplus. Please let me know if you need additional information.

Regards,

[your name]

- c. **Retagging** a computer with a new tag also requires approval by Inventory.
1. The snapshot and information sent to them is the same, and should include the old tag number if possible, along with the new tag number.
  2. If no old tag number can be found, the serial number may become critical to verify possession with the new tag number.
- ii. The Inventory Operations managers are responsive to email and will help to guide you through reinstating problematic assets.
  - iii. Once an asset tag has been cleared, you can add it into a CCART with other tags.

## 8. Surplus Pick-up Request Form

**8.1** The submission of a CCART to Surplus must be accompanied by the submission of a Surplus Property Pick up Request (Formstack). Items from campus, (both tagged/inventoried and untagged /non-inventoried), must be itemized on this form. A description of all non-inventory items needing pickup should also be included on this form. Photos may be required for larger items. The author will receive an email submission confirmation.

**8.2** Prior to pickup, inventory should be grouped according to its NT1 document numbers listed on the Formstack. The surplus team will not cull through a room full of machines; they need direction as to which NT1s are included on the pickup.

[https://utfacilities.formstack.com/forms/surplus\\_move\\_request\\_041017](https://utfacilities.formstack.com/forms/surplus_move_request_041017)

The screenshot shows the 'Surplus Property Pick Up Request' form. At the top, it says 'The University of Texas at Austin Facilities Services' and 'Surplus Property Pick Up Request'. Below this, there is a paragraph: 'Use this form to request a Surplus Property pick up. Please provide as much information as you can. Photos are encouraged and appreciated. If we need clarification, we will contact you directly. You will receive a detailed e-mail of your request upon submission of this form. Please retain it for your records. Facilities Service Center 512-471-2029'.

Below the paragraph, there is a section titled 'Devices Required Fields'. This is followed by a section titled 'Surplus Property Information'. Under this section, there is a note: 'Before sending inventoried items to surplus please complete a CCART.' and another note: 'This form is for surplus items only. If you have items to be relocated to another building, room or off location, please use the [Move Please/Leave Fold](#). For more information visit [Surplus Property](#) on the web.'

The next section is 'Surplus Information'. It contains several fields: 'Request Item', 'Request Date', 'Request Reason', and 'Request Cost'. There is also a checkbox labeled 'Is this item subject to the return request?' with a dropdown menu.

Below this is a section titled 'Accounting and Billing Information'. It contains a paragraph: 'Surplus Property is currently accepting untagged pick-up requests. Expedited and up to a paid service, and requires an account number. Institutional third parties are not subject to Surplus Property's standard based on their current contracts.' and another paragraph: 'Are the items subject to collection?' with a dropdown menu.

The final section is 'Scheduling Information'. It contains a paragraph: 'Surplus Property normal hours of operation are 9:00 am to 10:00 pm, and 1:00 pm to 4:00 pm Monday-Friday. Pick-up time ranges are only provided for paid expedited requests. Institutional third parties are not subject to Surplus Property's standard based on their current contracts.'