equipment.data
Research Equipment Asset Lifecycle

Research facility or equipment requirement identified	Procurement stage	Invoice stage	Capital items managed on asset register	Faculty update process
Need for piece of research equipment identified? Refer to RCUK equipment guidelines on EPSRC's Website	Procurement approval for any orders over £10k is required so it should be possible to capture all capital equipment purchases at this stage, whether a tender is necessary or not.	On satisfactory receipt of the goods and providing the "Good receipted" matches the purchase order on Agresso the Accounts Payable Team will process payment. If payment is being made in stage payments receipt of goods must be confirmed before payment is made.	Central Finance will monitor invoices paid on a monthly basis and will add major equipment purchases (single item of equipment costing over £25k) to the University's Asset Register. Also at this stage, **Central Finance will set up a new equipment record and E number (e.g. E0001) in the new Agresso Equipment module. The details will be taken from the purchase order.**	In addition to the annual asset verification process, monthly updates will be provided showing new assets added to your faculty's asset list for the previous month.

The Researcher Portal is a University of Southampton intranet based process guide designed to support providing staff and post graduate researchers through the research funding/project lifecycle from identification of an opportunity through to promoting impact.

Advice and relevant links for help with the grant application process, including purchase of research equipment, can be found on the **Researcher Portal.**

Is the piece of equipment or capability you require already available? For an RCUK grant you will be required to confirm this on the JES System. You can search the Southampton, SES5 consortia and National equipment databases on Sussed Researcher Tab

If a new piece of equipment, costing over £25k, has to be procured you should contact your Head of Faculty Finance (HOFF) in the first instance and/or Procurement. It should be noted that a formal tender may be necessary.

Information about the University's procurement procedures can be found on the procurement pages

University of Southampton procurement policy and guidance.

Your purchase order requisition must include the following details:

- Name of equipment item
- Description (What will the equipment deliver)
- Contact name and details (Manager of the equipment, e.g. Academic, lab manager or technician)
- Location e.g. Building and room
- Associated Facility (and no. e.g. F0001 (if to be located within a Research Facility) Procurement approval for any orders over £10k is required so it should be possible to capture all capital equipment purchases at this stage, whether a tender is necessary or not.

Information remains linked to record throughout the asset lifecycle

Information captured on the purchase requisition, additional information form will be added to the purchase order information on Agresso.

Procurement Team will only approve Purchases Orders completed as per Procurement guidelines requirement for capital items to have completed supporting purchase order information.

If a tender process is necessary, this will be managed by the procurement team, liaising with the Faculty as required.

A list of new capital assets will be provided to Faculties each month.

For further information on capital items asset management process contact the asset accountant.

Once the details of an asset have been passed to the Faculty, the Faculty becomes responsible for the information in the Equipment module, e.g. improvements to title, description, contact information, photos etc.

Define the capability e.g. environment and facility where it is located. Our "Quality in – Quality out" provides more information.

If you need help adding additional information or have spotted an error with one of your records you can use the help guide for the Agresso Facilities or Equipment module Instructions for finance staff or get in touch with your faculty finance contact.

Any photos of your equipment or facility should be saved at \\soton.ac.uk\Resource\Shared Resources\EquipmentSharingProject\Photos. Photos are divided by faculty with each piece of equipment having its own folder titled "E0001-201234" and then any photos for the equipment inside it.

Additional information such as instruction manuals (in pdf format) can be saved against your equipment item (See Guide).

If the new equipment changes your facility capability the "Facility" description can be quickly and easily changed in Agresso (See Guide).

Agresso equipment module has been modified to be UNIQUIP data publishing specification compliant. Supporting these new screens - An internal guide explains how to add and amend data in these new views.