Centrally Managed Assets Loan Guideline

School of Mathematics and Physics (SMP)

1. Purpose

This guideline establishes standardized procedures for borrowing centrally managed assets (e.g., tablets, specialized equipment) at the School of Mathematics and Physics (SMP). It ensures efficient resource allocation, clear accountability, and compliance with university policies.

2. Key Points

2.1 Loan Duration & Date Rules

The maximum allowable loan period for any school asset is **1 year (365 days)** from the selected "Expected Date of Collection", subject to specific category restrictions (e.g., the tablet guidelines listed in Section 3).

Note: The entire approval process typically takes 5 to 7 working days. Therefore, borrowers are strongly advised NOT to set the "Expected Date of Collection" as the same day the form is submitted. Additionally, the "Expected Date of Return" must be scheduled on a working day, avoiding weekends and University closure days.

2.2 Return and Re-application

Borrowers must return all equipment immediately upon completion of the specific task or term, and no later than the designated due date. There are no direct loan extensions or automatic renewals. If the device is needed again later, it must be physically returned first, after which a brand-new application may be submitted via the form.

2.3 Data Privacy Obligations

Prior to returning any device, borrowers must completely clear all personal data, sign out of all personal accounts (e.g., Apple ID), and remove all passwords. Devices must be returned in a ready-to-configure state.

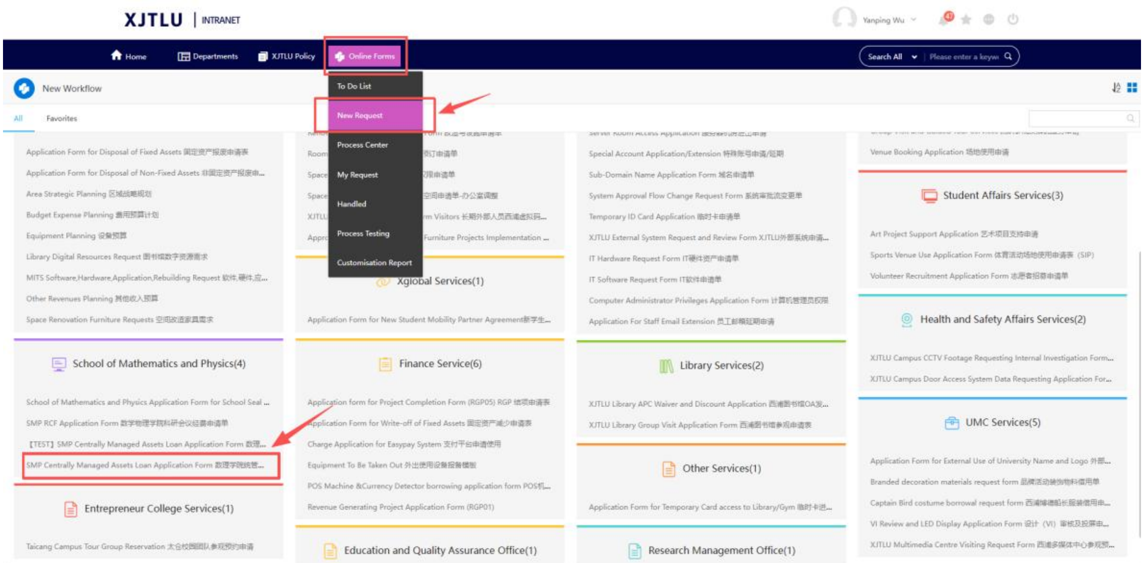
2.4 Borrower Responsibilities & Incident Handling

Borrowers assume full responsibility for the safety, proper use, and condition of the asset during the loan period. In the event of an incident, the following protocols must be followed:

- **Natural Damage/Malfunction:** If the device suffers from natural malfunction or standard wear-and-tear, the borrower must report to the School Fixed Asset Coordinator within 2 working days and actively cooperate with the School Fixed Asset Coordinator to complete the university's standard procedures.
- **User-Inflicted Damage**: If an assessment determines that the damage was caused by misuse, the borrower shall bear the full repair or replacement cost (based on official University procurement quotes).
- **Asset Loss**: If the device is lost or stolen, the borrower is strictly required to immediately (within 24 hours) notify the School Fixed Asset Coordinator. If stolen, a police report must be filed and a copy provided to the School. The borrower shall bear the full replacement cost (based on official University procurement quotes). Borrowing privileges will be suspended until the case is resolved.

3. How to Apply

Log in your Intranet OA and click ‘Online Forms’ to create a ‘New request’, then fill in the form of ‘SMP Centrally Managed Assets Loan Application Form’.



4. Special Rules for Justification Details (How to Fill in the Form)

To ensure an application passes smoothly through the entire approval workflow, the text in the "Justification Details" section must strictly comply with the following rules depending on the asset category and purpose:

- **Rule 1: Tablet Requests for Learning and Teaching**
  Tablets are managed strictly as term-time instructional resources. Therefore, regardless of the maximum 1-year general limit, the requested loan period for tablets should not cover winter and summer vacations and borrowers must specify the exact teaching weeks or semester in the justification text. Exceptions may be granted on a case-by-case basis to accommodate non-standard use of iPads. (e.g., if a staff member wish to conduct a review lecture during the summer, he/she may request a short-term loan.) Such requests will be considered flexibly, provided that a clear academic justification is submitted and the loan does not conflict with term-time teaching priorities.
- **Rule 2: Equipment for Research Purposes**
  If requesting any equipment other than standard tablets for research purposes (which may utilize the full 1-year duration if justified), borrowers must explain why standard university-provided IT devices cannot meet their specific research needs and explicitly specify the technical or operational limitations (e.g., insufficient processing power, lack of specific ports, software incompatibility).
  An exception is made for research-specific tablets: under special circumstances, they may also be requested for the full 1-year duration, provided that a highly sufficient and compelling justification is presented.

  Note: If you have any preferences regarding the equipment's brand, year, or model, please specify them in the Justification Details section. We will fulfil your request based on stock availability. If no preference is indicated, equipment will be issued in order of the school's asset numbers.

5. Approval Workflow & Lifecycle Management

The asset loan process comprises an automated approval routing stage based on the application reason, followed by a manual logistics and closure stage managed upon the asset's physical collection and return.

a) **Request:** Initiated by borrowers. Select the preferred Expected Date of Collect and Expected Date of Return, and confirm the understanding of borrower responsibilities.

b) **Pre-Review**: Performed by School Fixed Asset Coordinator. The primary purpose at this stage is to validate current stock availability and ensure the item is eligible for loan.

Note:

- *If the device is out of stock, the application will be directly rejected.*
- *The borrower's compliance record will be flagged for subsequent reviewers to evaluate if they meet either of the following conditions: 1. The borrower currently has unreturned items. 2. The borrower has a history of overdue returns.*
- *A comprehensive list of all assets under the applicant's name (e.g., purchased by external/internal funding, provided by MITS, etc.) will be recorded in the comments section for subsequent reviewers' reference.*

c) **Head of Department (HoD) Review:** Reviews the necessity of the loan based on the borrower's specific justification, ensuring alignment with university policies, School guidelines, and departmental operations.

d) **Associate Dean's Review:** Upon HoD approval, the system automatically routes the form based on the borrower's selected reason:

- **Teaching** ➔ Routed to Associate Dean for Learning & Teaching (ADLT).
- **Research** ➔ Routed to Associate Dean for Research (ADR).
- **Teaching & Research** ➔ Routed to Both ADLT & ADR for joint review.
- **Administrative** ➔ Bypasses all Associate Deans and routes directly to the next stage.

e) **School Dean's Final Review**: Final approval for the asset loan.

f) **Check-out & Check-in Management**: Performed by School Asset Coordinator. Manages both the physical handover and official recording of the asset at two different stages of the loan lifecycle:

- **Check-out:** Upon the School Dean's approval, the School Fixed Asset Coordinator will manually email the borrower to schedule a collection time (as the OA system will not trigger an automated notification while the workflow is still open). Borrowers must bring a printed copy of the approved form to collect the device. The School Fixed Asset coordinator will then log the check-out record into the no-code inventory platform.

- **Check-in:** When the loan expires, the borrower must return the physical asset to the School Fixed Asset Coordinator, who will then log the official return record into the no-code inventory platform.

g) **Asset Check & Workflow Closure:** Double checked by School Manager, the final gatekeeper of the entire workflow. Following the School Fixed Asset coordinator's return entry on the no-code inventory platform, School Manager will conduct a final physical inspection and verification of the asset in stock. The online workflow will officially close once the device is confirmed to be in good, accessible condition.

6. Contact & Support

- **School Fixed Asset Coordinator**:
  Ms. Meijun Li – Email: Meijun.Li@xjtlu.edu.cn – Tel: 0512-8518 6475

APPROVAL AND REVISION LOG

Date	Approval	Description
Jun 29, 2026	SSMT	Approved