UTSHARE Asset Transfer Workflow

Moving forward using Peoplesoft Workflow for Inventory transactions in place of DocuSign

Objective

*How To Prepare & Submit
Asset Transfer of Property To a Different
Location or Custodian in PeopleSoft 9.2
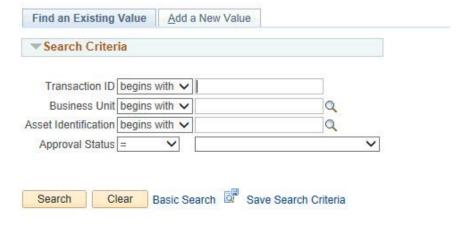Assets Management Module*

Navigation

Log in to PeopleSoft 9.2

Fluid Tile Navigation: Asset Mgmt & Cap. Expenditures > Asset UT Customizations > Asset Change Request

NavBar: Financials > UTZ Customizations > Asset Management > Asset Change Request

Asset Change Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

▼ Search Criteria

Transaction ID [begins with ▾] [   ]
Business Unit [begins with ▾] [   ] 🔍
Asset Identification [begins with ▾] [   ] 🔍
Approval Status [= ▾] [▾]

[Search] [Clear]   Basic Search 🔲 Save Search Criteria

Find an Existing Value | Add a New Value

Asset Change Request

CLICK:
Add a New Value Tab

ENTER

Transaction ID: NEXT (default)

Business Unit: UTTYL

Asset Identification: Leave Blank

Tag Number : Enter with leading "0". If not found, try entering without leading "0"

CLICK: on "Add"

Asset Change Request

| Find an Existing Value | Add a New Value |

Transaction ID NEXT

Business Unit UTTYL

Asset Identification 000000000069 x

Tag Number 023030

Add

Find an Existing Value | Add a New Value

Asset Change Request Details Page

Asset Details page will now display the asset information.

Tag Number

Serial ID (Number)

Department

Custodian

Location

Activity Type:

Select Asset Transfer

Enter the Following:

DATE OF TRANSER: enter today's date

NEW LOCATION: (click on look up icon to search of location code)
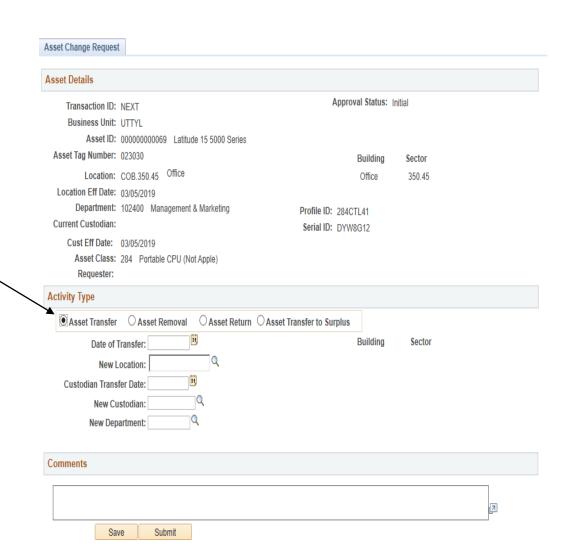
CUSTODIAN TRANSFER DATE: enter today's date

NEW CUSTODIAN: enter Employee ID # or use Lookup feature
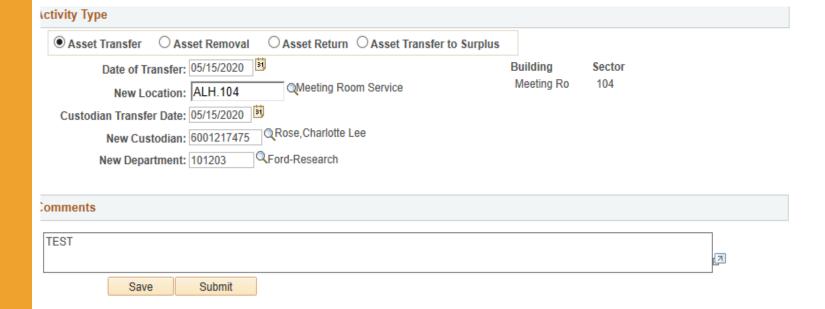
NEW DEPARTMENT: enter department or using lookup feature

COMMENTS: explain why this is occurring.

If you enter comments and press **SAVE**, the comments will be stored and will appear below the SAVE & SUBMIT buttons.
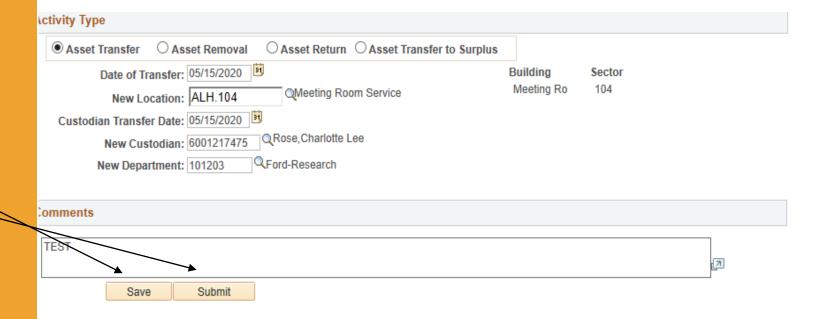

Asset Change Request

Asset Details

Transaction ID: NEXT   Approval Status: Initial
Business Unit: UTTYL
Asset ID: 000000000069   Latitude 15 5000 Series
Asset Tag Number: 023030   Building   Sector
Location: COB.350.45   Office   Office   350.45
Location Eff Date: 03/05/2019
Department: 102400   Management & Marketing   Profile ID: 284CTL41
Current Custodian: Serial ID: DYW8G12
Cust Eff Date: 03/05/2019
Asset Class: 284   Portable CPU (Not Apple)
Requester:

Activity Type

◉ Asset Transfer   ○ Asset Removal   ○ Asset Return   ○ Asset Transfer to Surplus

Date of Transfer: [_____] 📅   Building   Sector
New Location: [_____] 🔍
Custodian Transfer Date: [_____] 📅
New Custodian: [_____] 🔍
New Department: [_____] 🔍

Comments

[   ]

[Save]   [Submit]

VERIFY :

all Content to ensure Accuracy

Upon review:

CLICK "SAVE

CLICK "SUBMIT"

Once you click "**SUBMIT**" for the Transfer, a Transaction ID will appear: Showing "PENDING" status

Activity Type

⦿ Asset Transfer ◯ Asset Removal ◯ Asset Return ◯ Asset Transfer to Surplus

		Building	Sector
Date of Transfer:	05/15/2020 📅	Meeting Ro	104
New Location:	ALH.104 🔍Meeting Room Service		
Custodian Transfer Date:	05/15/2020 📅		
New Custodian:	6001217475 🔍Rose,Charlotte Lee		
New Department:	101203 🔍Ford-Research		

Comments

TEST

Save   Submit

TRANSACTION_ID=#########, BUSINESS_UNIT=UTTYL, ASSET_ID= 000000000069 : PENDING

Approval and Status Layout

Asset Transfer Approval-UTTYL

▼ TRANSACTION_ID=0000000072, BUSINESS_UNIT=UTTYL, ASSET_ID=000000000069, TAG_NUMBER=023030:Pending

UTTYL-Asset Transfer

Pending	Not Routed	Not Routed
Multiple Approvers Current Department Manager	Multiple Approvers New Department Manager	Multiple Approvers Fixed Asset Manager

ate Time: 05/15/2020 11:06 AM   Status: Submitted Updated by: Sanjana Gautharaju - UTShare
EST

Add

Four options to approve Asset Transfers

Financial Approval Notification on Tile
Email Notification
Notification Flag
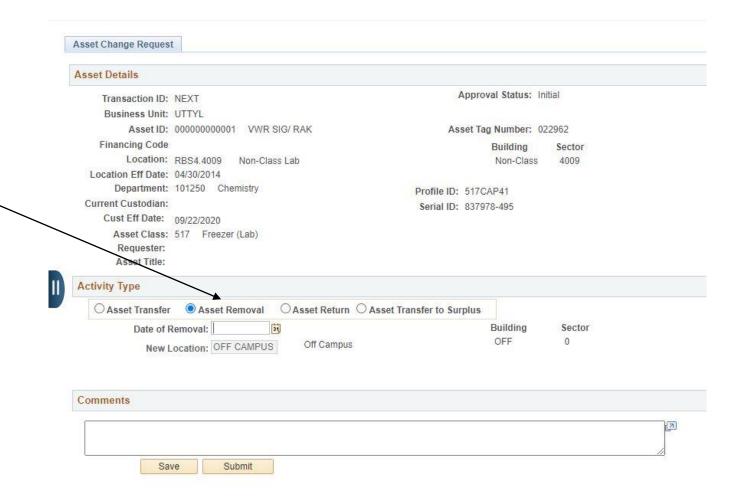Navigating to Asset Transfer Page

Approval Notification:

By Email.

PeopleSoft-Action Required-UTTYL Asset Transfer. Approval for Asset ID "000000000069" and Tag Number "023030"

Getting too much email? Unsubscribe

Workflow@utsystem.edu
Fri 5/15/2020 11:20 AM

To: CTroyer@uttyler.edu.utz; CharlotteRose@uttyler.edu.utz

Asset request for "Asset Transfer" needs your attention
Transaction ID   0000000072
Business Unit   UTTYL
Asset ID: 000000000069
Tag Number   023030
Description   Latitude 15 5000 Series

Link:
https://zaih-tst.utshare.utsystem.edu/psp/ZAIHTST/EMPLOYEE/ERP/c/UTZ_CUSTOMIZATIONS.UTZ_ASSET_RQST_CMP.GBL?
Page=UTZ_ASSET_RQST_PNL&Action=U&TRANSACTION_ID=0000000072&BUSINESS_UNIT=UTTYL&ASSET_ID=000000000069&TAG_NUMBER
=023030

Asset Removal

Enter:
Date of Removal

New Location:
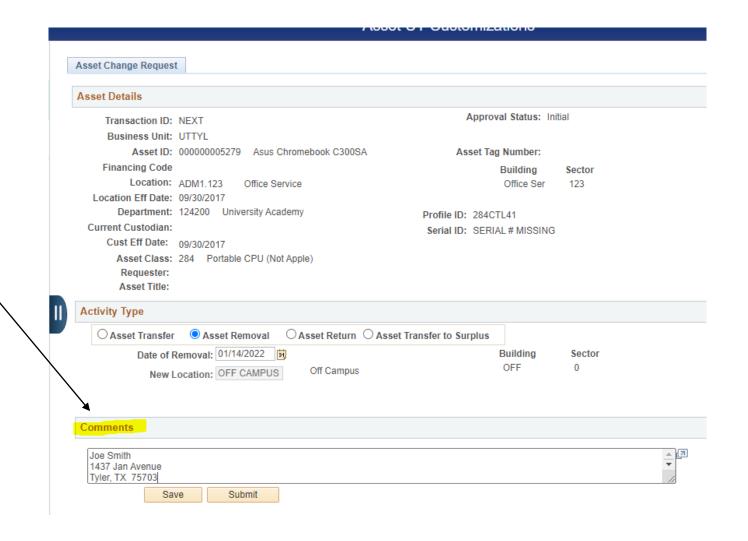Off Campus (will auto populate)

Asset Removal Cont.

Complete Comments Section:

<u>Enter:</u> custodian of the device

<u>Enter:</u> Custodians physical address

Click: Save

Click: Submit

Asset Removal Submitted for approval:

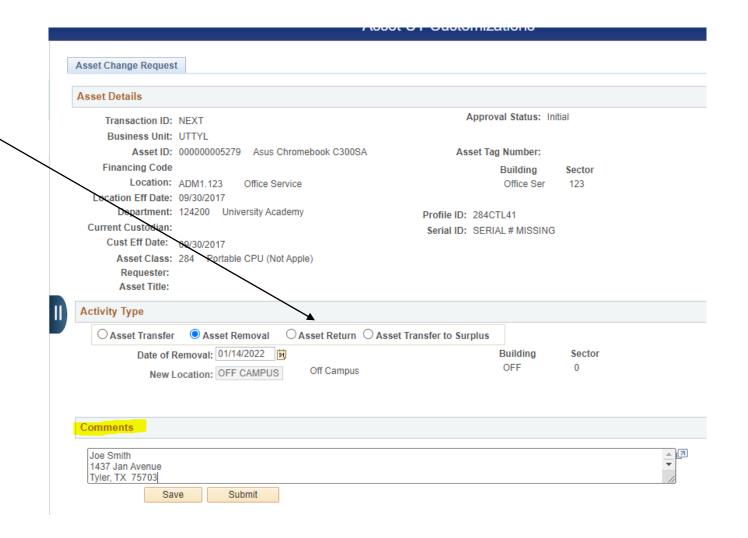## Routed to the Budget Authority to approve and then to Inventory for final approval.

Asset Removal: RETURN

Date of Return will pop up. (Enter date)

New Location: On Campus will auto populate

Approval- Routed to the Budget Authority for approval and then to Inventory for final approval.

Asset UI Customizations

Asset Change Request

Asset Details

Transaction ID: NEXT
Business Unit: UTTYL
Asset ID: 000000005279   Asus Chromebook C300SA
Financing Code
Location: ADM1.123   Office Service
Location Eff Date: 09/30/2017
Department: 124200   University Academy
Current Custodian:
Cust Eff Date: 09/30/2017
Asset Class: 284   Portable CPU (Not Apple)
Requester:
Asset Title:

Approval Status: Initial

Asset Tag Number:

	Building	Sector
	Office Ser	123

Profile ID: 284CTL41
Serial ID: SERIAL # MISSING

Activity Type

○ Asset Transfer   ● Asset Removal   ○ Asset Return   ○ Asset Transfer to Surplus

Date of Removal: 01/14/2022 [📅]
New Location: OFF CAMPUS   Off Campus

Building	Sector
OFF	0

Comments

Joe Smith
1437 Jan Avenue
Tyler, TX 75703

[Save]   [Submit]

Asset Transfer to Surplus / Disposal

Asset Change Request

Asset Details

Transaction ID: NEXT	Approval Status: Initial
Business Unit: UTTYL	
Asset ID: 000000000005 DELL LATITUDE E5440	Asset Tag Number: 022966
Financing Code	Building Sector
Location: BRB1.1155 Office	Office 1155
Location Eff Date: 10/30/2017	
Department: 105100 Dean Nursing & HS	Profile ID: 284CTL41
Current Custodian:	Serial ID: 8BBFYZ1
Cust Eff Date: 05/07/2014	
Asset Class: 284 Portable CPU (Not Apple)	
Requester:	
Asset Title:	

Activity Type

○ Asset Transfer   ○ Asset Removal   ○ Asset Return   ⦿ Asset Transfer to Surplus

Disposal Date: [   ] 📅

Date of Surplus: [   ] 📅   Building   Sector

New Location: [   ] 🔍

Surplus Department ID [115310]   Inventory for Disposal

Comments

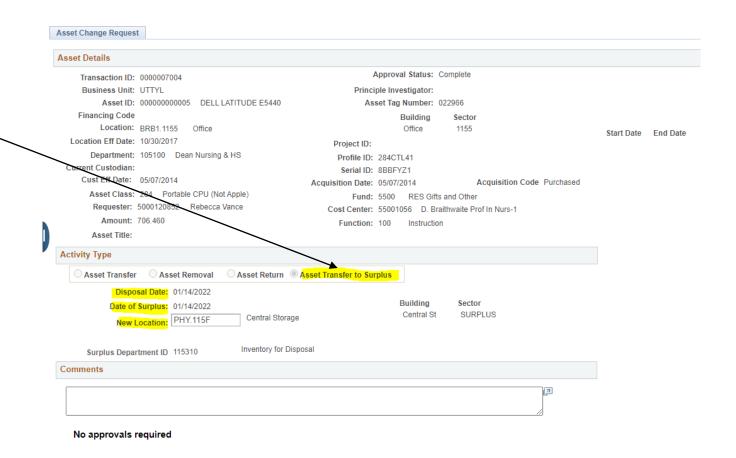[   ]

[Save]   [Submit]

Asset Transfer to Surplus / Disposals

Complete:

Disposal Date
Date of Surplus
New Location
Save and Submit.

(This will route directly to inventory for approval)

Thank you for your time today

Please feel free to contact me with any questions, concerns, suggestions, etc.

inventory@uttyler.edu