

The University of Texas  
Rio Grande Valley<sup>TM</sup>

Assets Management

# AM Workflow Removal

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# Objective

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***To Prepare & Submit  
Asset Transfer of Property  
for Off-Campus Use in  
Assets Management Module  
in PeopleSoft 9.2***

***by Explanation, Demonstration, & Practical Application***

# Navigation

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- 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

The screenshot shows the 'Asset Change Request' search page. At the top, there is a title 'Asset Change Request' and a subtitle 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two buttons: 'Find an Existing Value' and 'Add a New Value'. A section titled 'Search Criteria' contains four search fields: 'Transaction ID' with a 'begins with' dropdown and an input field; 'Business Unit' with a 'begins with' dropdown, an input field, and a magnifying glass icon; 'Asset Identification' with a 'begins with' dropdown, an input field, and a magnifying glass icon; and 'Approval Status' with an '=' dropdown and a selection dropdown. At the bottom of the search criteria section are buttons for 'Search', 'Clear', 'Basic Search' (with a magnifying glass icon), and 'Save Search Criteria'. At the very bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

# CLICK: ADD A NEW VALUE tab

## ENTER

Transaction ID: NEXT (default)


Business Unit: UTRGV or use look up icon


Asset Identification: enter if known or use look up icon

### Asset Change Request

[Find an Existing Value](#) [Add a New Value](#)

Transaction ID

Business Unit  

Asset Identification  

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

# About LOOKUP icon (magnifying glass)

If you elect to use LOOKUP icon (magnifying glass)

-- pop-up window will appear

-- change [begins with] next to ASSET

IDENTIFICATION to [contains] and enter what information you know

or

-- change [begins with] next to TAG NUMBER to [contains] and enter what information you know

Look Up Asset Identification

Business Unit UTRGV

Asset Identification contains 933

Tag Number begins with

Look Up Clear Cancel Basic Lookup

Search Results

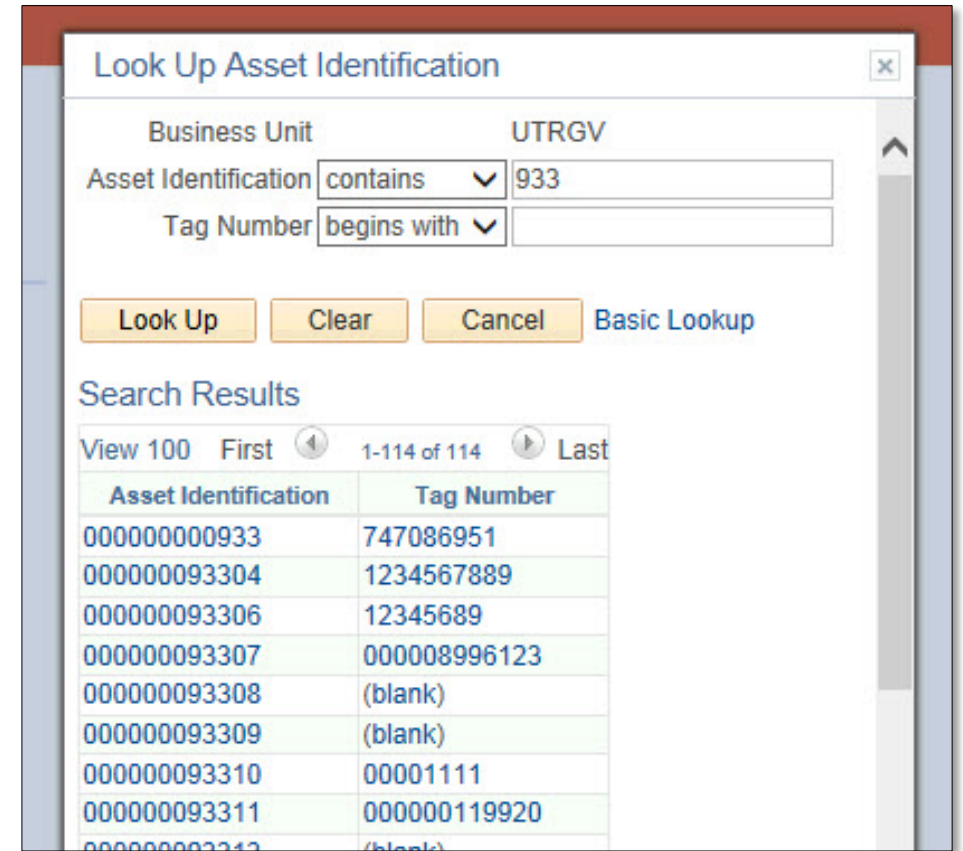
View 100 First 1-114 of 114 Last

Asset Identification	Tag Number
00000000933	747086951
000000093304	1234567889
000000093306	12345689
000000093307	000008996123
000000093308	(blank)
000000093309	(blank)
000000093310	00001111
000000093311	000000119920
000000093312	(blank)

# CLICK – LOOK UP Button

A list of corresponding assets will appear

Look for the asset with the 0000000 (seven zeroes prefix)



Look Up Asset Identification

Business Unit UTRGV

Asset Identification contains 933

Tag Number begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-114 of 114 Last

Asset Identification	Tag Number
00000000933	747086951
000000093304	1234567889
000000093306	12345689
000000093307	000008996123
000000093308	(blank)
000000093309	(blank)
000000093310	00001111
000000093311	000000119920
000000093312	(blank)


# CLICK on ASSET you want to REMOVE (to Off-Campus location)


The pop up will disappear  
The ASSET IDENTIFICATION number will now appear

### Asset Change Request

[Find an Existing Value](#) [Add a New Value](#)

Transaction ID

Business Unit  

Asset Identification  

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

# Click ADD Button

**Asset Details** page will now open with current info (asset details)


**Asset Change Request**


**Asset Details**


Transaction ID	NEXT	Approval Status	Initial
Business Unit	UTRGV		
Asset ID	000000093304	22222	
Asset Tag Number	1234567889		
Serial Number		Building #	Sector
Location			
Location Effective Date	05/08/2018		
Department			
Project			
Current Custodian			
Custodian Effective Date	05/08/2018		
Asset Class	110	Other Office Furniture	


**Activity Type**


Asset Transfer    Asset Removal    Asset Return    Asset Transfer to Surplus

Date of Transfer  


Location  

Custodian Transfer Date  

Department  

Custodian  

**Comments**





# REVIEW Content of Asset Details Section

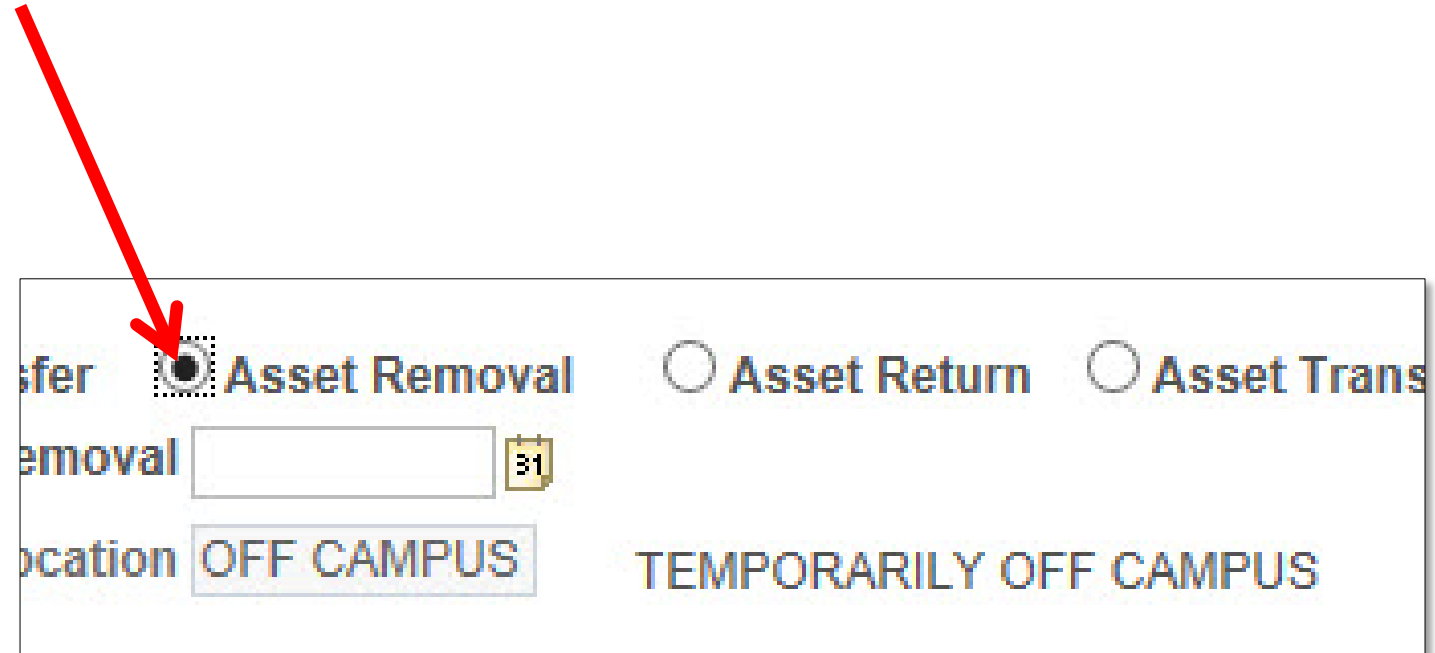
Verify this is the Asset you want to TRANSFER

If not correct asset please start over by clicking on the **HOME** icon in upper right corner

**DO NOT SAVE YOUR WORK** (not yet)


Asset Details				
Transaction ID	NEXT		Approval Status	Initial
Business Unit	UTRGV			
Asset ID	00000093307	Equipment Cap Medical		
Asset Tag Number	000008996123			
Serial Number			Building #	Sector
Location	2311122	MEDICAL EDUCATION BUILDING	231	1.122
Location Effective Date	05/08/2018			
Department				
Project				
Current Custodian	6001144738	Farris, Cynthia Ann		
Custodian Effective Date	05/08/2018			
Asset Class	536	Ultrasound Equipment		

NOTE: In **ACTIVITY TYPE** section  
select **ASSET REMOVAL**



The screenshot shows a portion of a web form. A red arrow points to the 'Asset Removal' radio button, which is selected. To its right are two unselected radio buttons: 'Asset Return' and 'Asset Trans'. Below the radio buttons, there is a text input field labeled 'removal' with a calendar icon to its right. Below that is a dropdown menu labeled 'ocation' with 'OFF CAMPUS' selected. To the right of the dropdown is the text 'TEMPORARILY OFF CAMPUS'.

fer  Asset Removal  Asset Return  Asset Trans

removal  

ocation  TEMPORARILY OFF CAMPUS

# ENTER TRANSFER INFORMATION

- **DATE OF REMOVAL:** enter today's date
- Location: **OFF CAMPUS** (already populated)
- **COMMENTS:** enter information ***COMPLETE PHYSICAL ADDRESS*** of where the ASSET will be located. Be as detailed as possible. The more detail you enter now the less looking you will have to do at inventory time.
- If you enter comments and press **SAVE** the comments will appear below the Save & Submit buttons. The comments will remain throughout the transaction.

## Asset Change Request

Pearl S. Buck High School, 12<sup>th</sup> Grade Counselor's Office, 1313 Mockingbird Lane, Saint Louis, Texas 78787.  
Name of Staff Member & Phone Number

**VERIFY ALL CONTENT**

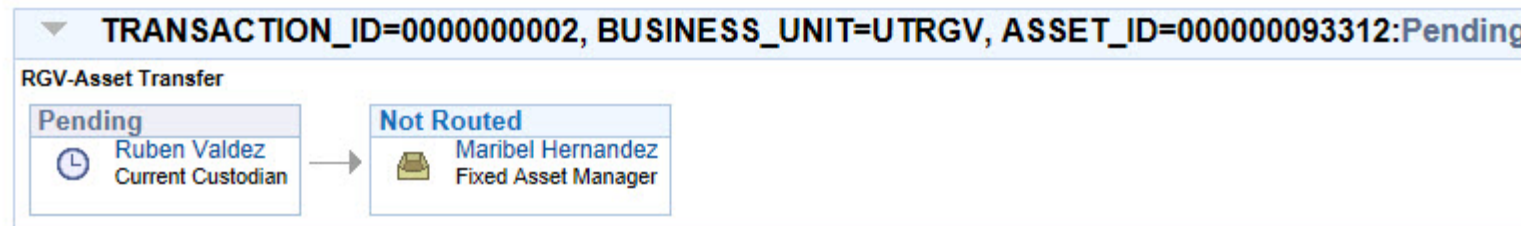
# Click SUBMIT Button

- Once you click SUBMIT below the form ASSET TRANSFER APPROVAL similar to the following will appear -
- **TRANSACTION\_ID=0000000002, BUSINESS\_UNIT=UTRGV, ASSET\_ID=000000093312 : Pending**

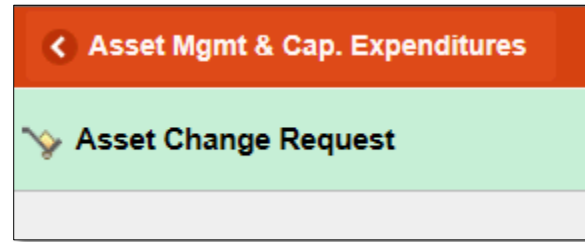
# NOTICE

The Current Custodian is notified to APPROVE the TRANSFER. Once approved the FIXED ASSET MANAGER will be notified to approve final part of the process.

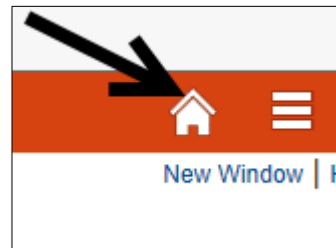
## Asset Transfer Approval



- 
- Click Asset Change Request to process a new Asset Change Request or



- Return **HOME** to start a new process



Once all APPROVALS have been made this  
**PROCESS** is now complete.



Contact us at:

- If you have questions please contact us at [fixed.assets@utrgv.edu](mailto:fixed.assets@utrgv.edu)

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Assets Management