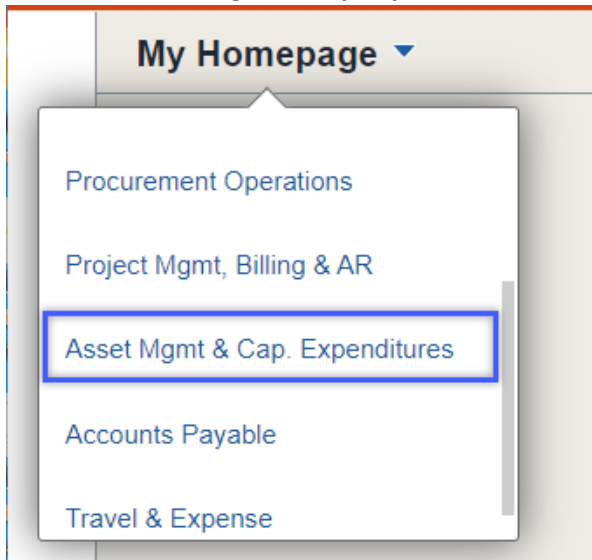


HOW TO - INITIATE AN ASSET TRANSFER FOR PROPERTY OFFICER/LOCATION WORKFLOW IN PEOPLESOFT

The purpose of this process is to successfully initiate an **Asset Transfer** workflow in PeopleSoft. Asset Transfers can be submitted for custodian and/or location updates.

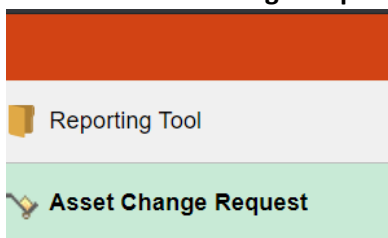
1. Log into PeopleSoft.
2. Select the **Asset Mgmt & Cap Expenditures Module**.



3. Select the **Asset UT Customizations** tile.



4. Select the **Asset Change Request** from the left menu bar.



HOW TO - INITIATE AN ASSET TRANSFER FOR PROPERTY OFFICER/LOCATION WORKFLOW IN PEOPLESFT

5. Select **Add a New Value**.

Asset Change Request

Find an Existing Value



Add a New Value

Search Criteria

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

Recent Searches Saved Searches

Transaction ID

Business Unit

Asset Identification

Approval Status

[Show fewer options](#)

6. Enter UTRGV on the **Business Unit Field**.

7. Enter the Asset Identification number, if available.

If the Asset ID number is NOT available:

- Select the Look up Asset icon (magnifying glass).
- Change the dropdown menu to Contains on the **Tag number** field.
- Enter the asset tag number.
- Select **Look Up**.
- Select the asset under Search Results.

Look Up Asset Identification

Business Unit

Asset Identification

Tag Number

Basic Lookup

Search Results

View 100 First 1 of 1 Last

Asset Identification	Description	Tag Number
000000095523	ZEBRA TC52 WLAN NFC 5.0"	17698


8. Select **Add** from the Asset Change Request page.

Asset Change Request

Transaction ID

Business Unit

Asset Identification



9. Select **Asset Transfer** under Activity Type.

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Date of Transfer:

New Location:

Custodian Transfer Date:

New Custodian:

New Department:

Building Sector

10. Enter today's date on the **Date of Transfer** field.

Select the **New Location** if required.

To locate the building and room number, click the magnifying glass to use the building descriptions fields.

Change Short Description to **contains** to narrow down your search.

Look Up New Location

SetID UTRGV

Location Code

Description

Short Description

Search Results

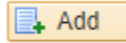
View 100 First 1-181 of 181 Last

Location Code	Description	Short Description	Sector	Jurisdiction	City
201021	ACADEMIC SUPPORT FACILITY	E-ASFC	.021	MAIN	Edinburg
201100	ACADEMIC SUPPORT FACILITY	E-ASFC	100	MAIN	Edinburg

**if this is the only update, go to step 15 to Submit.*

HOW TO - INITIATE AN ASSET TRANSFER FOR PROPERTY OFFICER/LOCATION WORKFLOW IN PEOPLESFT

11. Enter today's date on the Custodian Transfer Date field if a **PROPERTY OFFICER** update is required.
12. Enter the **Property Officers** employee ID or select the magnifying glass to look up by name.
13. Enter the **New Department** code or select the magnifying glass to look up by name.
14. Enter **Comments** with information approvers may find helpful.
15. Select **Submit** to create the workflow. Once submitted, the workflow will be assigned a transaction ID and the Approval Status will update in In Process.
16. To create another workflow, click on **Add** at the bottom right of the page.



Sample of a Completed Asset Transfer (next page):

HOW TO - INITIATE AN ASSET TRANSFER FOR PROPERTY OFFICER/LOCATION WORKFLOW IN PEOPLESFT

Asset Change Request

Asset Details

Transaction ID: 0000011421		Approval Status: In Process	
Business Unit: UTRGV			
Asset ID: 00000095523 ZEBRA TC52 WLAN NFC 5.0"			
Asset Tag Number: 17698		Building	Sector
Location: 2011223	ACADEMIC SUPPORT FACILITY	E-ASFC	1.223
Location Effective Date: 04/05/2019			
Department: 202001	Financial Services-Comptroller		
Current Custodian: EMPLOYEE ID	EMPLOYEE NAME		
Custodian Effective Date: 01/29/2021			
Asset Class: 219	Palm Pilots		
Requester: EMPLOYEE ID	EMPLOYEE NAME		

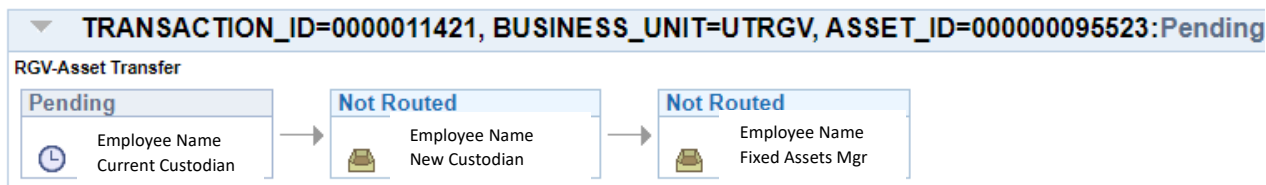
Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Date of Transfer: 01/20/2021		Building	Sector
New Location: <input type="text" value="1221240"/>	SCIENCE ENGR. & TECH.	B-SETB	1.240
Custodian Transfer Date: 01/20/2021			
New Custodian: EMPLOYEE ID	EMPLOYEE NAME		
New Department: 202001	Financial Services-Comptroller		

Comments

Asset Transfer Approval



Date Time: 03/02/2021 10:54 AM Status: Submitted Updated by: Linda Arellano Mares
 updating location and custodian due to dept changes.

Add

- The current and new Property Officer (listed on the custodian fields) are required to Approve the workflow.
- Fixed Assets will approve, pending discrepancies such as employee status or non-active location code.
- The updates will not reflect on the asset record until the workflow is complete.