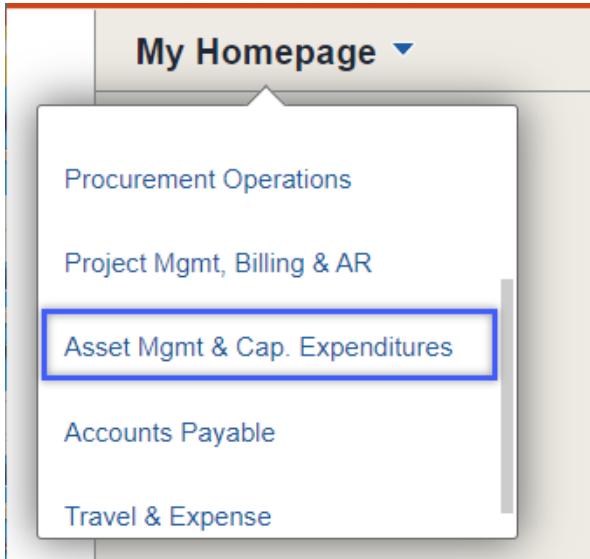


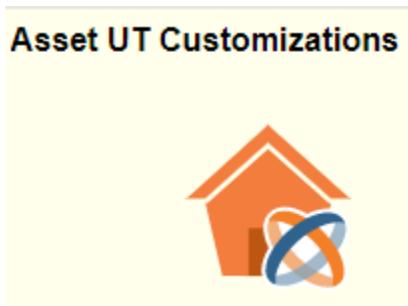
HOW TO - INITIATE AN ASSET TRANSFER FOR CUSTODIAN/LOCATION WORKFLOW IN PEOPLESOFT

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.

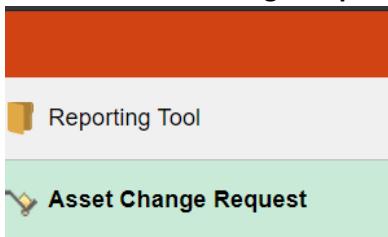
1. Log into PeopleSoft.
2. Select the **Asset Mgmt & Cap Expenditures Module**.



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 CUSTODIAN/LOCATION WORKFLOW IN PEOPLESOF

5. Select Add a New Value.

Asset Change Request

Find an Existing Value

Search Criteria

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

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

Transaction ID begins with Business Unit begins with Asset Identification begins with Approval Status =



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

7. Enter the Asset Identification number, if available.

If the Asset ID number is NOT available:

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

Look Up Asset Identification 

Business Unit UTRGV

Asset Identification begins with Tag Number contains 17698

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

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

Transaction ID 

Business Unit 

Asset Identification 

Add



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

Activity Type

Asset Transfer Asset Removal Asset Return Asset Transfer to Surplus

Date of Transfer: <input type="text"/>		Building	Sector
New Location: <input type="text"/>			
Custodian Transfer Date: <input type="text"/>			
New Custodian: <input type="text"/>			
New Department: <input type="text"/>			

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	<input type="text" value="began with"/>
Description	<input type="text" value="contains"/>
Short Description	<input type="text" value="contains"/> E-ASFC

Look Up **Clear** **Cancel** **Basic Lookup**

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 CUSTODIAN/LOCATION WORKFLOW IN PEOPLESOFT

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 CUSTODIAN/LOCATION WORKFLOW IN PEOPLESOFT

Asset Change Request

Asset Details

Transaction ID:	0000011421	Approval Status:	In Process
Business Unit:	UTRGV		
Asset ID:	000000095523	ZEBRA TC52 WLAN NFC 5.0"	
Asset Tag Number:	17698	Building:	
Location:	2011223	ACADEMIC SUPPORT FACILITY	Sector
Location Effective Date:	04/05/2019	E-ASFC	1.223
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

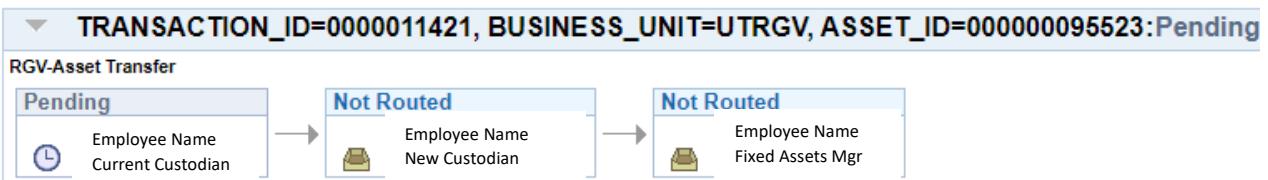
Asset Transfer Asset Removal Asset Return Asset Transfer to Surplus

Date of Transfer:	01/20/2021	Building:	
New Location:	1221240	SCIENCE ENGR. & TECH.	Sector
Custodian Transfer Date:	01/20/2021	E-SETB	1.240
New Custodian:	EMPLOYEE ID	EMPLOYEE NAME	
New Department:	202001	Financial Services-Comptroller	

Comments

Date Time: 03/02/2021 10:54 AM Status: Submitted Updated by: Linda Arellano Mares

Asset Transfer Approval



Date Time: 03/02/2021 10:54 AM Status: Submitted Updated by: Linda Arellano Mares

- 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.