

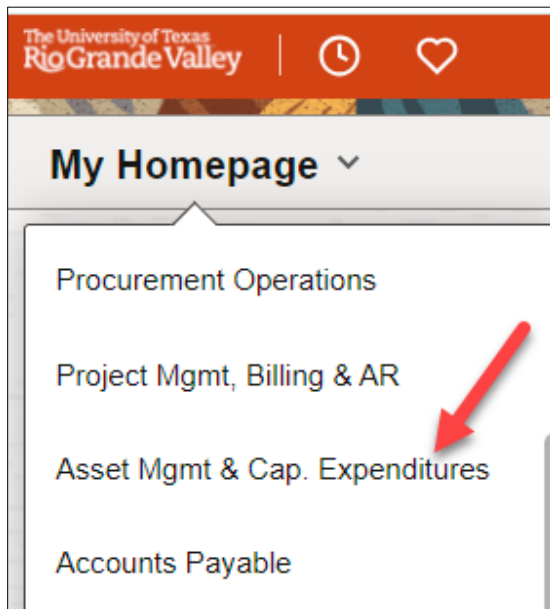
HOW TO - INITIATE A SURPLUS TRANSFER IN PEOPLESOFT

The purpose of this process is to successfully initiate a Surplus Transfer workflow in PeopleSoft. Once the approval process is complete, the asset record will update the custodian and location, and will no longer be listed on the inventory. **IF YOUR ASSET IS A COMPUTER, TABLET, LAPTOP OR IPAD; PLEASE CREATE A TICKET FOR HARD DRIVE REMOVAL FOR SURPLUS VIA THE IT SUPPORT CENTER.** When completed by the Information Technology department, a workflow can be initiated. All other assets can be initiated immediately.

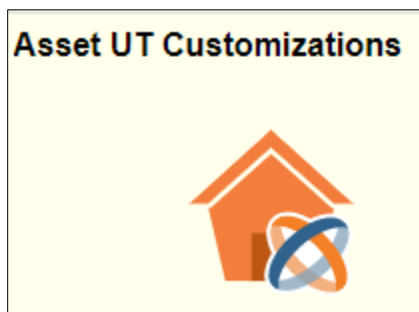
IMPORTANT: If the asset record and physical location of the asset are not same, please contact Assets Management. We will update the location data on your behalf. Once updated, the workflow can be created. If the location information is incorrect the workflow will be cancelled.

Use the Comments field to insert a contact name and phone number.

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

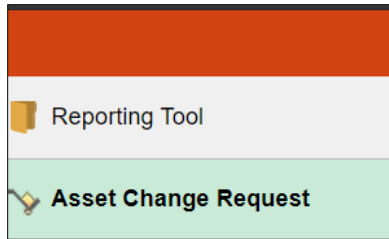


3. Select the **Asset UT Customizations** tile.

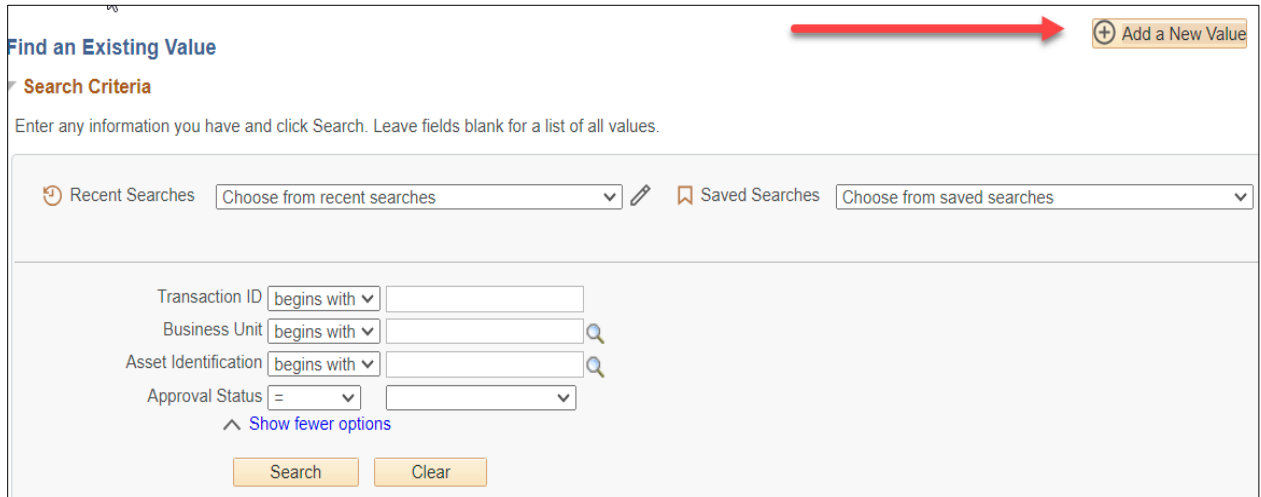


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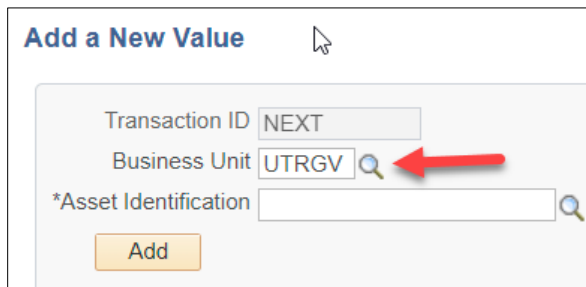
4. Select the **Asset Change Request** from the left menu bar.



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

A screenshot of a search interface titled 'Find an Existing Value'. At the top right, there is a button labeled '+ Add a New Value' with a red arrow pointing to it. Below the title, there is a section for 'Search Criteria' with instructions: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two search history sections: 'Recent Searches' and 'Saved Searches', each with a dropdown menu. Below these are four search criteria fields: 'Transaction ID' (dropdown: 'begins with'), 'Business Unit' (dropdown: 'begins with'), 'Asset Identification' (dropdown: 'begins with'), and 'Approval Status' (dropdown: '='). Each field has a corresponding input box and a magnifying glass icon. At the bottom, there are 'Search' and 'Clear' buttons, and a link that says '^ Show fewer options'.

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

A screenshot of the 'Add a New Value' form. The 'Transaction ID' field contains the text 'NEXT'. The 'Business Unit' field contains the text 'UTRGV' and has a red arrow pointing to it. The '*Asset Identification' field is empty. There is an 'Add' button at the bottom left of the form.

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

Tag Number

Basic Lookup

Search Results

View 100 First ◀ 1 of 1 ▶ Last

Asset Identification	Description	Tag Number
0000115604	IPAD	15604

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

Asset Change Request

Transaction ID

Business Unit

Asset Identification

←

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

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Sanitization Date:

Sanitization Method:

Date of Surplus:

New Location:

Building Sector

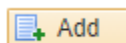
10. Enter the **Sanitization Date**: this is the date IT has completed the hardware removal. (*Non-computer assets will not require a sanitization date.*)
11. Enter the **Sanitization Method**: choose the method (degauss, destruct, overwrite) used to remove hardware. (*Non-computer assets will not require a Sanitization method*)
12. Enter **Date of Surplus**: this is the date the workflow is being created.
13. Select **New Location**: Chose the surplus in or closest to your campus. Choosing an invalid surplus location will cause the workflow to be cancelled and will have to be resubmitted.

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Location Code	Description	Short Description	Sector	Jurisdiction	City
100SURPLUS	ACADEMIC SUPPORT FACILITIES A	B-ASFA	SURPLUS OFF		Brownsville
276SURPLUS	COMMUNITY ENGAGEMENT & STUDENT	E-CESS	SURPLUS OFF		Edinburg
605SURPLUS	HEALTH AFFAIRS AND LOGIS BLDG	M-HALB	SURPLUS OFF		McAllen

*The only valid locations are Brownsville or McAllen.

14. In the **Comments** Field, provide a contact name and phone number. This is the information the General Services staff will use to schedule a pickup. If this information is not provided, the workflow will be cancelled.
15. Select **Submit** to create the workflow. Once submitted, the workflow will be assigned a transaction ID and the Approval Status will update to In Process.
16. To create another workflow, click on **Add** at the bottom right of the page.



Sample of a Completed Asset Transfer to Surplus for a Computer or like Asset

Asset Change Request

Asset Details

Transaction ID: 0000011460 Approval Status: In Process

Business Unit: UTRGV

Asset ID: 000000000199 TABLET DELL VENUE 11 PRO

Asset Tag Number: 747086062

Location: 1131428	MAIN	Building: B-MAIN	Sector: 1.428
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Location Effective Date: 06/10/2020

Department: 410653 Anthropology

Current Custodian: Employee ID Employee name

Custodian Effective Date: 06/10/2020

Asset Class: 219 Palm Pilots

Requester: Employee ID Employee name

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Sanitization Date: 03/15/2021

Sanitization Method: Degauss

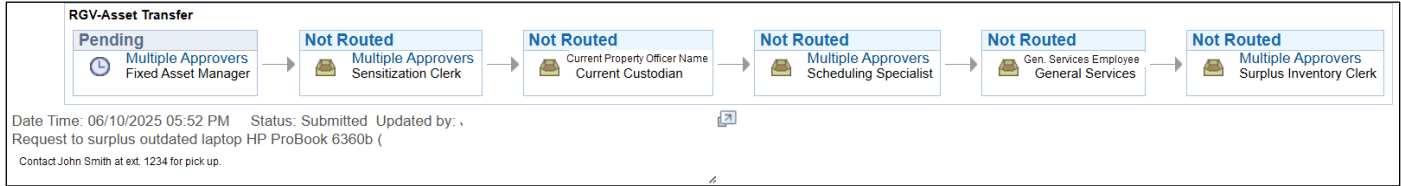
Date of Surplus: 03/22/2021

New Location: 100SURPLUS	ACADEMIC SUPPORT FACILITIES A	Building: B-ASFA	Sector: SURPLUS
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Comments

Asset Transfer Approval

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- Assets Management will review for correct selection of surplus campus, contact information and missing status assets.
- The Information Technology department will approve once the sanitization process is complete. (IT will approve if the assets are considered a computer-like asset, (examples: iPads, tablets, phones).
- The Property Officer (listed as the Current Custodian) will approve the surplus request.
- Central Scheduling (Scheduling Specialist) will create a work order on your behalf and include the work order number in the comments field. This approval does not indicate the asset has been picked up, only that the work order is in progress.
- General Services will approve after the assets have been picked up.
- Central Receiving (Surplus Inventory Clerk) will receive surplus inventory and approve the workflow.
- The updates will reflect the surplus location on the asset record when the workflow is completed.

Sample of a Completed Asset Transfer to Surplus for a Non-Computer. These workflows will not require Sanitization dates, methods or IT approvals. *Next Page*

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Asset Change Request

Asset Details

Transaction ID: 0000011461		Approval Status: In Process	
Business Unit: UTRGV			
Asset ID: 000000000182 702 - Sound Devices Portable D			
Asset Tag Number: 747086201		Building	Sector
Location: 1112910	LIFE & HEALTH SCIENCES	B-LHSB	2.910
Location Effective Date: 01/01/2003			
Department: 410710	Binloov		
Current Custodian: Employee ID	Employee name		
Custodian Effective Date: 01/01/2001			
Asset Class: 129	Stereo Systems		
Requester: Employee ID	Employee name		

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Sanitization Date:

Sanitization Method:

Date of Surplus: 03/22/2021		Building	Sector
New Location: 100SURPLUS	ACADEMIC SUPPORT FACILITIES A	B-ASFA	SURPLUS

Comments

Asset Transfer Approval

▼ TRANSACTION_ID=0000011461, BUSINESS_UNIT=UTRGV, ASSET_ID=000000000182:Pending

RGV-Asset Transfer

<div style="background-color: #e0e0e0; padding: 2px;">Pending</div> <div style="font-size: 0.8em;">Multiple Approvers Fixed Asset Manager</div>	→	<div style="background-color: #e0e0e0; padding: 2px;">Not Routed</div> <div style="font-size: 0.8em;">Current Property Officer Name Current Custodian</div>	→	<div style="background-color: #e0e0e0; padding: 2px;">Not Routed</div> <div style="font-size: 0.8em;">Multiple Approvers Scheduling Specialist</div>	→	<div style="background-color: #e0e0e0; padding: 2px;">Not Routed</div> <div style="font-size: 0.8em;">Gen. Services Employee General Services</div>	→	<div style="background-color: #e0e0e0; padding: 2px;">Not Routed</div> <div style="font-size: 0.8em;">Multiple Approvers Surplus Inventory Clerk</div>
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Contact John Smith at ext. 1234 for pick up.

- Assets Management will review for correct selection of surplus campus, contact information and missing status assets
- The Property Officer (current custodian) for the asset is required to approve the surplus request.
- Central Scheduling (Scheduling Specialist) will create a work order on your behalf and include the work order number in the comments field. This approval does not indicate the asset has been picked up, only that the work order is in progress.
- General Services will approve after the assets have been picked up.
- Central Receiving (Surplus Inventory Clerk) will receive surplus inventory and approve the workflow.
- The updates will not reflect on the asset record until the workflow is complete.