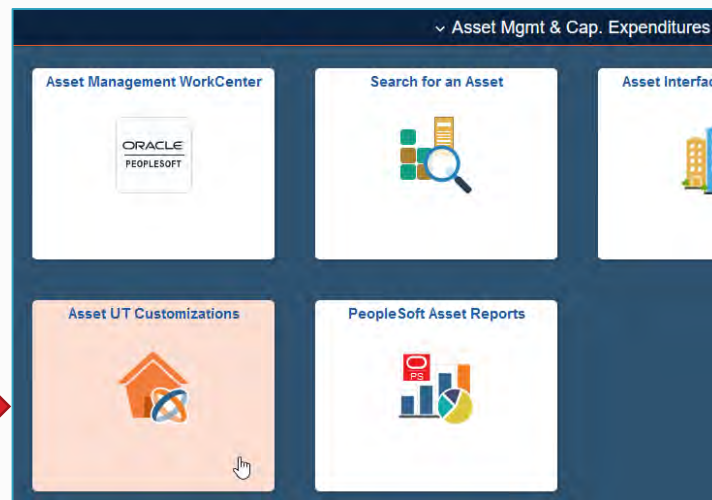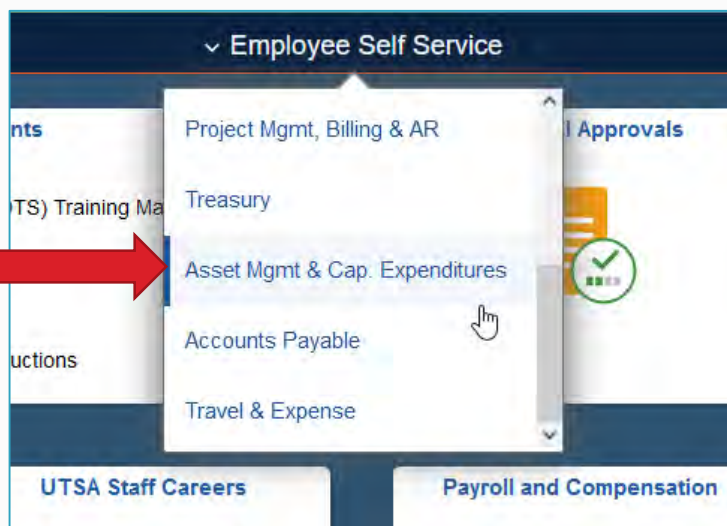# Asset Change Request (ACR) to Surplus:
ICP Workflow Process

Job Aid

Processing an ACR to Surplus

Select the **Asset Mgmt & Cap. Expenditures (AM) Module** to access the "Asset UT Customizations" tile.

Processing an ACR to Surplus (cont'd)

Click on "Add a New Value" tab.

Processing an ACR to Surplus (cont'd)

1. Enter the following:

   - Business unit code: **UTSA1**
   - Tag number of the asset to be transferred to Surplus

2. Click "Add"

Note: The "Transaction ID" and "Asset Identification" populate with default values.

Asset Change Request

Find an Existing Value | Add a New Value

Transaction ID NEXT

Business Unit UTSA1

Asset Identification 000000000018 ×

Tag Number 166686

Add ⬅

Find an Existing Value | Add a New Value

Processing an ACR to Surplus (cont'd)

3. Review the **Asset Details**:

   • Current asset details will display

   • Verify you are transferring the correct asset to Surplus

Only ICPs who have access to the **PeopleSoft AM Module** can submit asset change requests. The ICP is listed as the "requester."

Processing an ACR to Surplus (cont'd)

4. In the **Activity Type** section, select "Asset Transfer to Surplus."

Asset Change Request

Asset Details

Transaction ID: NEXT
Business Unit: UTSA1
Asset ID: 000000000018   DATA PROJECTOR: PANASONIC 350
Asset Tag Number: 166686
Location: A21118   Athl Temp Offc Bld 1.118
Location Eff Date: 05/12/2020
Department: AIT006   OIT LEARNING TECHNOLOGIES
Current Custodian: 600
Cust Eff Date: 05/12/2020
Asset Class: 218   Data Projectors
Requester:

Approval Status: Initial
Principle Investigator:

Building   Sector
AT2   1 118

Project ID:
Profile ID: 218CTL41
Serial ID: SC4136048
Acquisition Date: 06/11/2014

Activity Type

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

Sanitization Date:
Sanitization Method:
Date of Surplus:
New Location:
Surplus Department ID

Asset Condition:
Hazardous Asset: ☐

Building   Sector

Comments

Save   Submit

Processing an ACR to Surplus (cont'd)

5. Enter the asset transfer information:

- **Sanitization Date:** Select today's date

- **Sanitation Method:** Select an option from the drop-down menu

- **Date of Surplus:** Select today's date

- **Asset Condition:** Select an option from the drop-down menu

- **Hazardous Asset:** Select if applicable
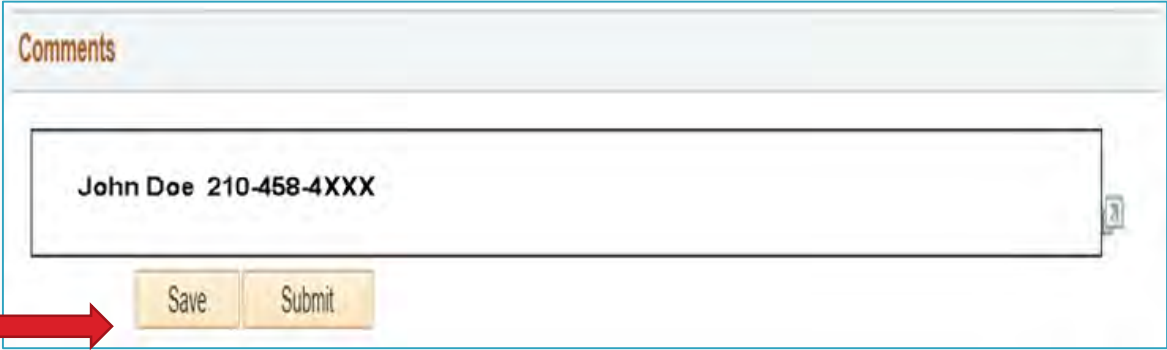
- **New Location:** Auto-populates with **CASURPLUS**

- **Surplus Department ID:** Auto-populates with **BFA016**

Processing an ACR to Surplus (cont'd)

6. Verify all content

Processing an ACR to Surplus (cont'd)

7. Add comments:

   - Add contact person's name and phone number

   - Surplus will schedule a pickup

8. Click "Save" or "Submit"

   - Save: Holds the transfer in an initial (incomplete) status

   - Submit: Routes the transfer request to the first approver

Processing an ACR to Surplus (cont'd)

A transaction ID number will populate.

Asset Transfer Approval-UTSA1

▼ TRANSACTION_ID=0000000064, BUSINESS_UNIT=UTSA1, ASSET_ID=000000000018, TAG_NUMBER=166686:Pending

UTSA1-Asset Transfer

The request will be in a **"Pending"** status as it routes for multiple approvals.

Notify your department manager that an asset transfer is pending his/her approval.

Asset Transfer Approval-UTSA1

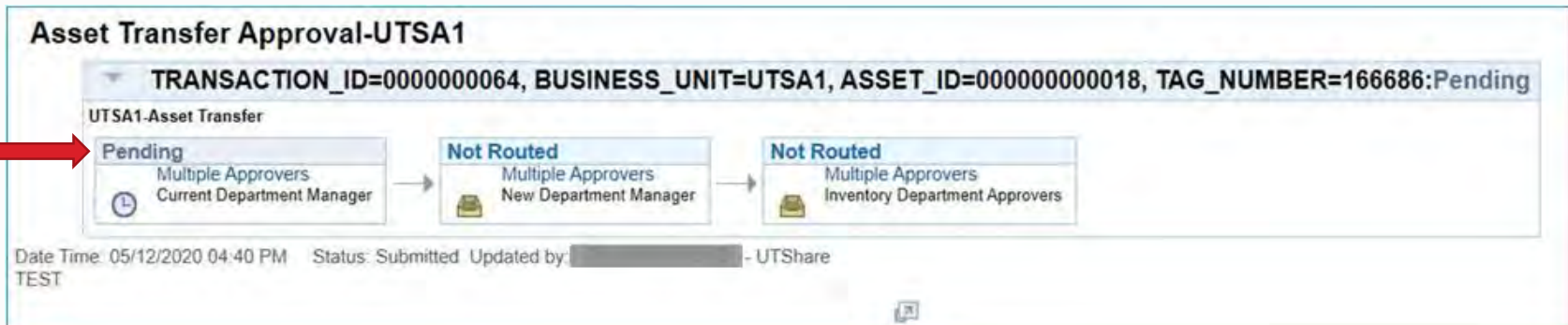▼ TRANSACTION_ID=0000000064, BUSINESS_UNIT=UTSA1, ASSET_ID=000000000018, TAG_NUMBER=166686:Pending

UTSA1-Asset Transfer

Pending	Not Routed	Not Routed
Multiple Approvers Current Department Manager	Multiple Approvers New Department Manager	Multiple Approvers Inventory Department Approvers

Date Time: 05/12/2020 04:40 PM   Status: Submitted Updated by: _____ - UTShare
TEST