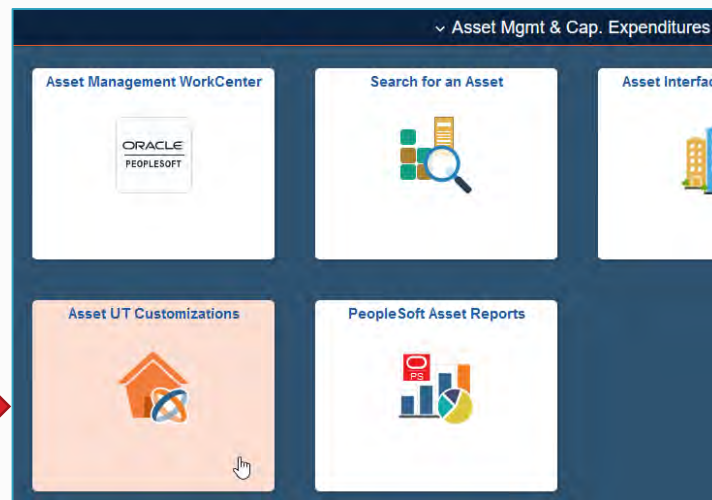
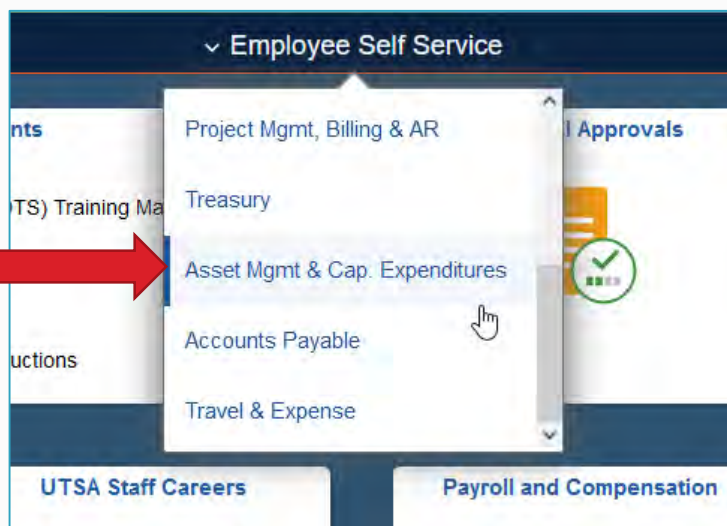


Asset Change Request (ACR) to Surplus: ICP Workflow Process

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.

The screenshot shows the 'Asset Change Request' form in the 'Asset Mgmt & Cap. Expenditures' system. The form is titled 'Asset Change Request' and includes a navigation bar with 'Asset Mgmt & Cap. Expenditures' and 'Asset UT Customizations'. The left sidebar shows 'Asset Change Request' and 'Reporting Tool'. The main content area has a heading 'Asset Change Request' and a sub-heading 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two tabs: 'Find an Existing Value' and 'Add a New Value'. A red arrow points to the 'Add a New Value' tab. Below the tabs is a 'Search Criteria' section with several fields: Transaction ID (begins with), Business Unit (begins with), Asset Identification (begins with), Tag Number (begins with), Approval Status (=), Department (begins with), and Activity Type (=). At the bottom are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A footer bar at the bottom of the form contains the text 'Find an Existing Value | Add a New Value'.

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

Business Unit

Asset Identification

Tag Number

[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.”

Asset Change Request			
Asset Details			
Transaction ID:	NEXT	Approval Status:	Initial
Business Unit:	UTSA1	Principle Investigator:	
Asset ID:	000000000018	DATA PROJECTOR: PANASONIC 350	
Asset Tag Number:	166686	Building	Sector
Location:	A21118 Athl Temp Offc Bld 1.118	AT2	1 118
Location Eff Date:	05/12/2020	Project ID:	
Department:	AIT006 OIT LEARNING TECHNOLOGIES	Profile ID:	218CTL41
Current Custodian:	600% [REDACTED]	Serial ID:	SC4136048
Cust Eff Date:	05/12/2020	Acquisition Date:	06/11/2014
Asset Class:	218 Data Projectors		
Requester:			
Activity Type			

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	Approval Status: Initial
Business Unit: UTSA1	Principle Investigator:
Asset ID: 000000000018 DATA PROJECTOR: PANASONIC 350	
Asset Tag Number: 166686	Building: AT2 Sector: 1 118
Location: A21118 Athl Temp Offc Bld 1.118	
Location Eff Date: 05/12/2020	Project ID:
Department: AIT006 OIT LEARNING TECHNOLOGIES	Profile ID: 218CTL41
Current Custodian: 6001844460	Serial ID: SC4136048
Cust Eff Date: 05/12/2020	Acquisition Date: 06/11/2014
Asset Class: 218 Data Projectors	
Requester:	

Activity Type

Asset Transfer Asset Removal Asset Return Asset Transfer to Surplus

Sanitization Date: Asset Condition:

Sanitization Method: Hazardous Asset:

Date of Surplus: Building: Sector:

New Location:

Surplus Department ID

Comments

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**


The screenshot shows a web form for processing an asset transfer. The 'County type' is set to 'Asset Transfer to Surplus'. The 'Sanitization Date' and 'Date of Surplus' are both set to 05/13/2020. The 'Sanitization Method' is 'Dismantled'. The 'Asset Condition' is 'Fair'. The 'Hazardous Asset' checkbox is unchecked. The 'New Location' is 'CASURPLUS', which has auto-populated the 'Building' as 'CAR' and the 'Sector' as 'SURPLUS'. The 'Surplus Department ID' is 'BFA016', which has auto-populated the department as 'SURPLUS SALES AND SERVICE'.


County type	Sanitization Date	Sanitization Method	Date of Surplus	New Location	Asset Condition	Hazardous Asset	Building	Sector	Surplus Department ID
<input checked="" type="radio"/> Asset Transfer to Surplus	05/13/2020	Dismantled	05/13/2020	CASURPLUS	Fair	<input type="checkbox"/>	CAR	SURPLUS	BFA016


Processing an ACR to Surplus (cont'd)


6. Verify all content


Asset Transfer Asset Removal Asset Return Asset Transfer to Surplus

Sanitization Date: 05/13/2020  Asset Condition: Fair 

Sanitization Method: Dismantled/  Hazardous Asset:

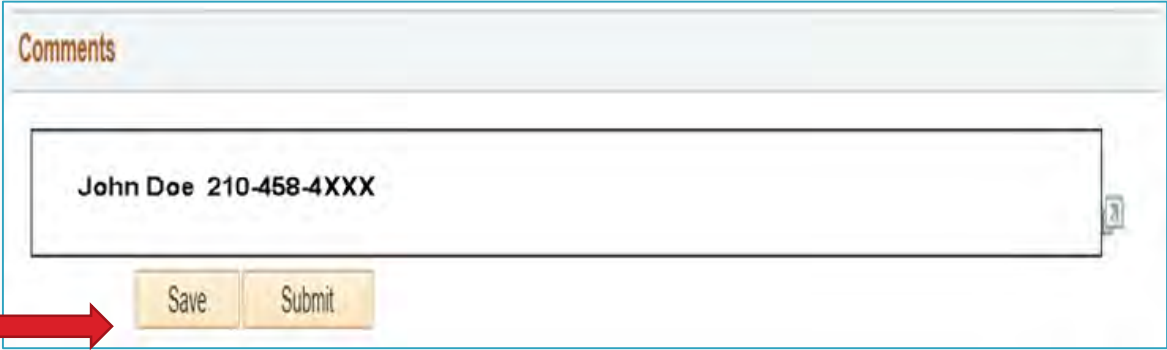
Date of Surplus: 05/13/2020 

New Location:	Building	Sector
CASURPLUS  CARSURPLUS WAREHOUSE	CAR	SURPLUS

Surplus Department ID: BFA016  SURPLUS SALES AND SERVICE

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



Comments

John Doe 210-458-4XXX

Save Submit

Processing an ACR to Surplus (cont'd)

A transaction ID number will populate.



Asset Transfer Approval-UTSA1

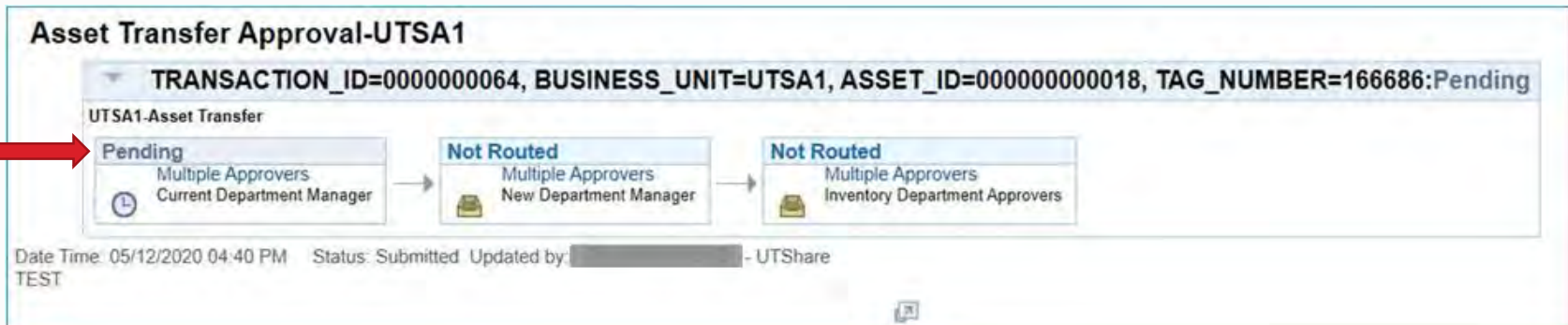
TRANSACTION_ID=0000000064, BUSINESS_UNIT=UTSA1, ASSET_ID=000000000018, TAG_NUMBER=166686:Pending

UTSA1-Asset Transfer

A red arrow points to the transaction ID field.

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
Multiple Approvers
Current Department Manager

Not Routed
Multiple Approvers
New Department Manager

Not Routed
Multiple Approvers
Inventory Department Approvers

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

A red arrow points to the 'Pending' status box.