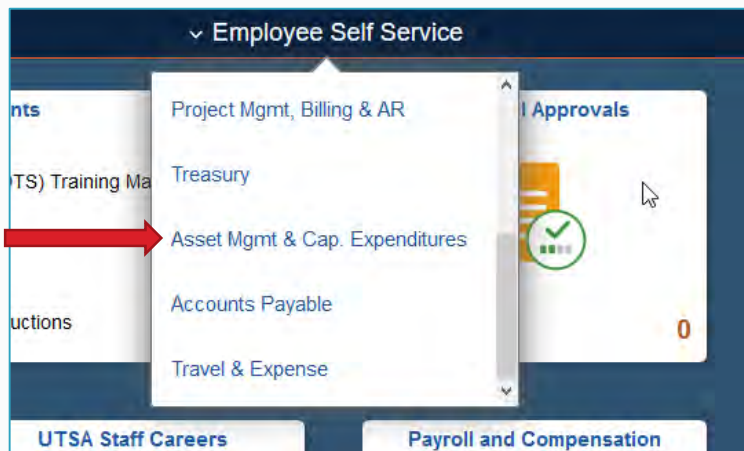


Update Asset Location in PeopleSoft Asset Management & Capital Expenditures (AM) Module

Job Aid

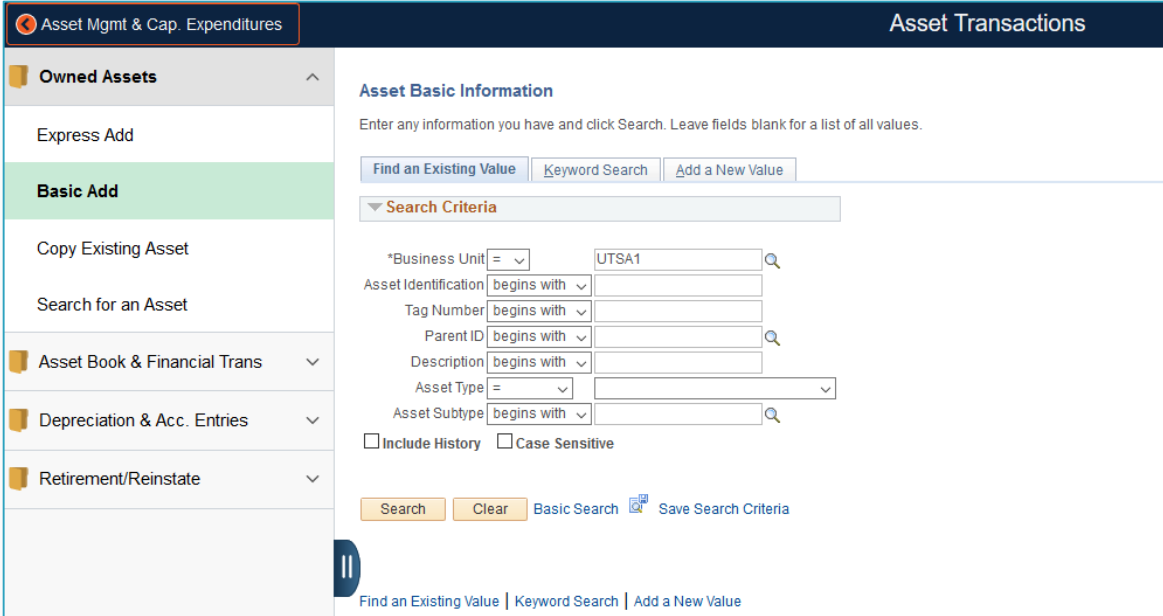
Asset Location Change

Asset location changes are processed under the “Asset Transactions” tile in the **Asset Mgmt & Cap. Expenditures (AM)** module.



Asset Location Change (cont'd)

Select "Basic Add" to begin a search using the asset tag number.



Asset Mgmt & Cap. Expenditures Asset Transactions

Owned Assets ^

- Express Add
- Basic Add**
- Copy Existing Asset
- Search for an Asset

Asset Book & Financial Trans v

Depreciation & Acc. Entries v

Retirement/Reinstate v

Asset Basic Information

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

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

Search Criteria

*Business Unit = v UTSA1 Q

Asset Identification begins with v

Tag Number begins with v

Parent ID begins with v Q

Description begins with v

Asset Type = v

Asset Subtype begins with v Q

Include History Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

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

Asset Location Change (cont'd)

Enter the asset tag number in the “Tag Number” field, then click “Search.”

Asset Transactions

Asset Basic Information

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

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

▼ **Search Criteria**

*Business Unit = ▼ 🔍

Asset Identification begins with ▼

Tag Number begins with ▼ 🔍

Parent ID begins with ▼ 🔍

Description begins with ▼

Asset Type = ▼

Asset Subtype begins with ▼ 🔍

Include History Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Asset Location Change (cont'd)


To process a **location change**, select the “Location/Comments/Attributes” tab on the Asset Transaction screen.

Asset Transactions

- General Information
- Operation/Maintenance
- Asset Acquisition Detail
- Location/Comments/Attributes**
- Manufacture/License/Custodian
- Asset Supplemental Data

Unit UTSA1 Asset ID 000000011292 LAPTOP CPU: LATITUDE 7400 Tag 177099 In Service

Asset Information

Description	LAPTOP CPU: LATITUDE 7400	Short Desc	LAPTOP CPU	
CAP #		Seq #		
<input checked="" type="checkbox"/> Taggable Asset		Tag Number	177099	
Asset Class	284	Asset Type	Portable CPU (Not Apple)	
Asset Subtype		<input checked="" type="checkbox"/> Capitalized Asset		
Asset Status	In Service	<input checked="" type="checkbox"/> New Asset		
Acquisition Date	11/09/2018	<input type="checkbox"/> Available For Use		
Placement Date		<input type="checkbox"/> In Physical Use		
Collateral Asset				
Acquisition Code	Purchased			
FERC Code	03			

Asset Location Change (cont'd)

Before entering the new location code, click on the plus (+) icon to automatically populate the current effective date.

The screenshot displays the 'Asset Transactions' interface. The 'Location' tab is active, showing the 'Effective Date' field set to 04/22/2019. A red circle highlights this date field, and a red arrow points to the plus (+) icon next to it. Below this, a second screenshot shows the 'Effective Date' field updated to 09/22/2021. An orange arrow points to the plus (+) icon in the second screenshot, and a callout box contains the text: 'Notice the new date after clicking on the plus (+) icon.'

Asset Location Change (cont'd)

Enter the new location code in the “Location” field.

- Click on the magnifying glass icon next to the “Location” field to view a list of campus locations. The **Look Up Location** tab will pop up.
- Enter a “Location Code” to narrow your search and click “Look Up.”
- Locate the correct room number, then click on it to populate the location box.

Asset Transactions

General Information
Operation/Maintenance
Asset Acquisition Detail
Location/Comments/Attributes
Manufacture/License/Custodian
Asset Supplemental Data

Unit UTSA1
Asset ID 000000011292
LAPTOP CPU: LATITUDE 7400
Tag 1770

Location

Effective Date

Location

Area ID

Address UTSA

City San Antonio

County Bexar

State TX Texas

Effective Sequence

Employee-Working From Home

Jurisdiction

Sector HC

*SetID UTSA1
Help

Location Code begins with

Description begins with

Basic Lookup

Search Results

View 100 First 1-164 of 164 Last

Location Code	Description
NP1002	North Paseo Bld 1.002
NP1002A	North Paseo Bld 1.002A
NP1002B	North Paseo Bld 1.002B

Asset Location Change (cont'd)

The new location is now displayed in the “Location” field. Click “Save” to save your changes.

Asset Transactions

General Information | Operation/Maintenance | Asset Acquisition Detail | **Location/Comments/Attributes** | Manufacture/License/Custodian | Asset Supplemental Data

Unit UTSA1 Asset ID 000000011292 LAPTOP CPU: LATITUDE 7400 Tag 177099 In Service

Location Find | View All First 1 of 2 Last

Effective Date 09/22/2021 Effective Sequence 1

Location NP1002 North Paseo Bld 1.002

Area ID

Address 1 UTSA
City San Antonio
County Bexar Jurisdiction
State TX Texas Sector 1.002
Country USA United States Postal 78249

Geo Code
Document

Detailed Description
Image

Save Return to Search Add Update/Display Include History

General Information | Operation/Maintenance | Asset Acquisition Detail | **Location/Comments/Attributes** | Manufacture/License/Custodian | Asset Supplemental Data

Asset Location Change (cont'd)

Next, use the dropdown button to expand the “Comments” box and enter your comments.

Room#

Authorization

Status Date

Name

Comments

Expand section Comments

User Attributes

CR Route Institution

CR BLDG Code Historical Tag Number

Acquisition Date Asset Condition

Sanitization Method Surplus Department ID

Sanitization Date

▶ Detailed Description

▶ Image

Save Return to Search Add Update/Display Include History

[General Information](#) | [Operation/Maintenance](#) | [Asset Acquisition Detail](#) | [Location/Comments/Attributes](#) | [Manufacture/License/Custodian](#) | [Asset Supplemental Data](#)

Asset Location Change (cont'd)

Click the plus (+) icon to update the "Date/Time" field and add your comments.
Click "Save" to save your changes.

The screenshot displays two overlapping windows from the UTSA Business Affairs system. The top window shows a comment for an asset with the following details:

- Date/Time: 03/16/2021 12:00:00AM
- User: [blank]
- Source: [blank]
- Name: LAPTOP CPU: LATITUDE 7400
- Comment: Item found by Barcode in WFH on 2020-09-01

A red arrow points to a plus (+) icon in the top right corner of this window. An orange arrow points from the Date/Time field to the Date/Time field in the bottom window.

The bottom window shows a comment for the same asset with the following details:

- Date/Time: 09/22/2021 3:56:46PM (circled in red)
- User: [blank]
- Source: [blank]
- Name: [blank]
- Comment: Updated location. Employee is returning to campus. (indicated by a red arrow)

At the bottom of the interface, there are several buttons: "Save" (indicated by a red arrow), "Return to Search", "Add", "Update/Display", and "Include History". A breadcrumb trail at the bottom reads: "General Information | Operation/Maintenance | Asset Acquisition Detail | Location/Comments/Attributes | Manufacture/License/Custodian | Asset Supplemental Data".