

Asset Change Request Approver Job Aid
Asset Management Workflow
UTShare PeopleSoft 9.2

Asset Change Request (ACR) Approval

When an ACR is created and submitted by a department's ICP the document routes and notifies the:

- **Current Department Manager:** Losing department for approval
- **New Department Manager:** Gaining department for acceptance approval
- **AM Inventory Department Approvers:** For final approvals

Asset Transfer Approval-UTSA1

TRANSACTION_ID=0000000033, BUSINESS_UNIT=UTSA1, ASSET_ID=000000005686, TAG_NUMBER=172072: **Approved** [View/Hide Comments](#)

UTSA1-Asset Transfer

Admin Approved ✓ Gary K Lott Current Department Manager 08/11/20 - 4:58 PM	→	Admin Approved ✓ Garry Sunter New Department Manager 08/11/20 - 4:59 PM	→	Admin Approved ✓ James H Sumner Inventory Department Approvers 08/11/20 - 4:59 PM
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▶ **Comments**

Date Time: 08/09/2020 12:37 PM Status: Submitted Updated by: James H Sumner
No longer needed in Inventory.



Asset Change Request Approval

There are four navigational options to approve pending ACRs:

- **Email Notification** — Department manager selects the email link and it will take them to the Asset Transfer Details page within UTShare.
- **Financial Approval Tile** — Department manager will have to navigate to the Asset Change Request, enter the Business Unit, Tag Number and click SEARCH
- **Notification Flag** — Same as above
- **Navigating to Asset Transfer Page** — Same as above

Email Notification Approval Option

Department manager selects the email link and it will take them directly to the Asset Transfer Details page. Login access to UTShare is required.

PeopleSoft-Action Required-UTSA1 Asset Transfer. Approval for Asset ID "000000000018" and Tag Number "166686"

 Getting too much email? [Unsubscribe](#)

 **Workflow@utsystem.edu**     
Tue 5/12/2020 4:40 PM
To: Ana.Rodriguez1@utsa.edu.utz; Cynthia.Orth@utsa.edu.utz +2 others

Asset request for "Asset Transfer" needs your attention

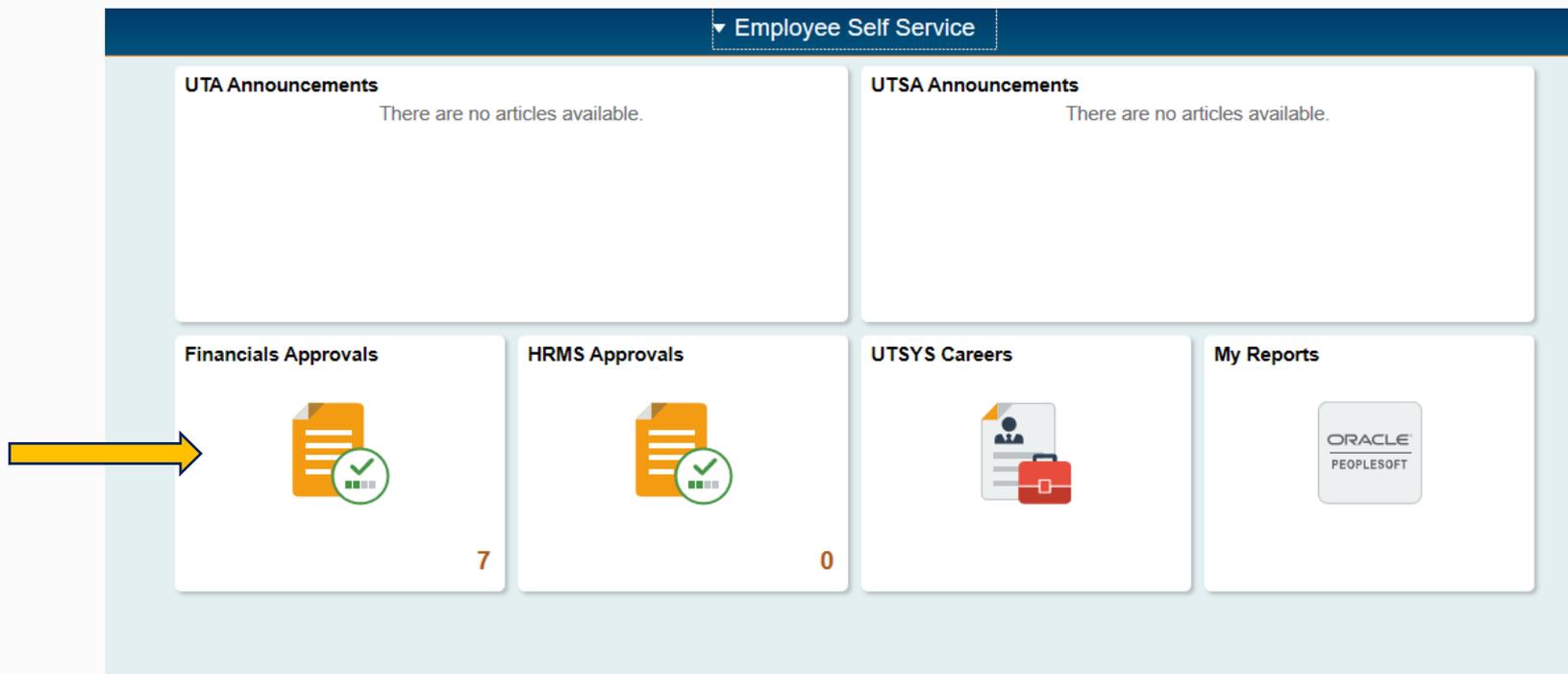
Transaction ID 0000000064
Business Unit UTSA1
Asset ID: 000000000018
Tag Number 166686
Description DATA PROJECTOR: PANASONIC 350

Link:
https://zaih-tst.utshare.utsystem.edu/psp/ZAIHTST/EMPLOYEE/ERP/c/UTZ_CUSTOMIZATIONS.U TZ_ASSET_RQST_CMP.GBL?Page=UTZ_ASSET_RQST_PNL&Action=U&TRANSACTION_ID=0000000064&BUSINESS_UNIT=UTSA1&ASSET_ID=000000000018&TAG_NUMBER=166686

Financial Approval Tile Option

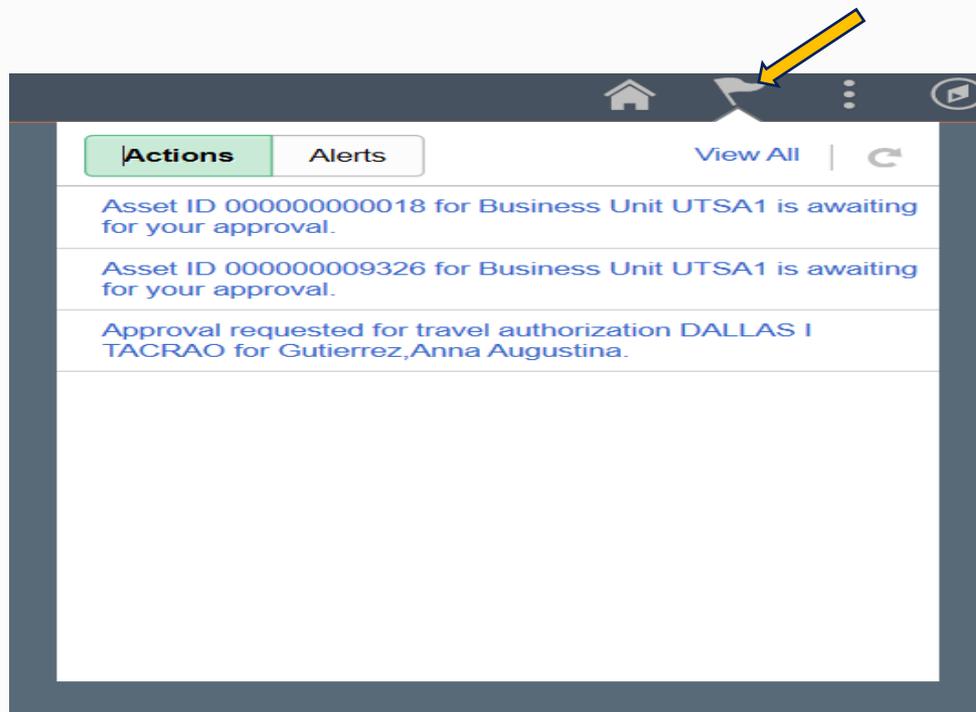
Financial Approval Tile

Department manager will have to navigate to the Asset Change Request, enter the Business Unit, Tag Number and click SEARCH



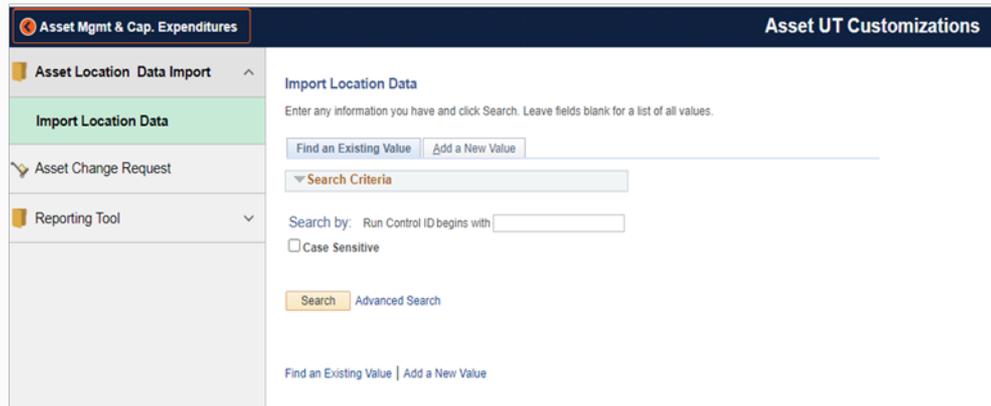
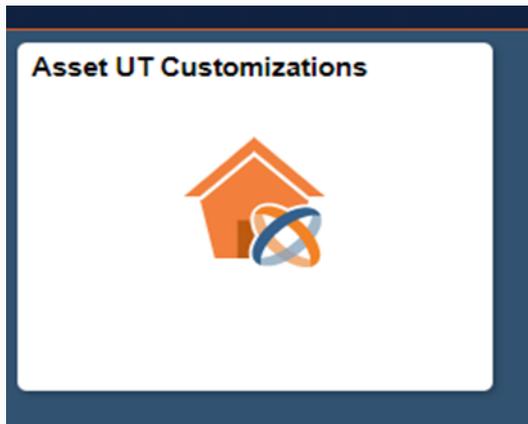
Notification Flag Approval Option

The department manager selects the link that will take them to the Asset Change Request selection page, enter the Business Unit, Tag Number and click SEARCH



Navigation Approval Option

- Log in to PeopleSoft 9.2
- **NavBar:** Financials > UTZ Customizations > Asset Management > Asset Change Request
or
- **Fluid Tile Navigation:** Asset Mgmt & Cap. Expenditures > Asset UT Customizations > Asset Change Request



Asset Change Request Selection

Using the NavBar: Financials > UTZ Customizations > Asset Management > Asset Change Request

Asset Change Request

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

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

▼ Search Criteria

Transaction ID

Business Unit 

Asset Identification 

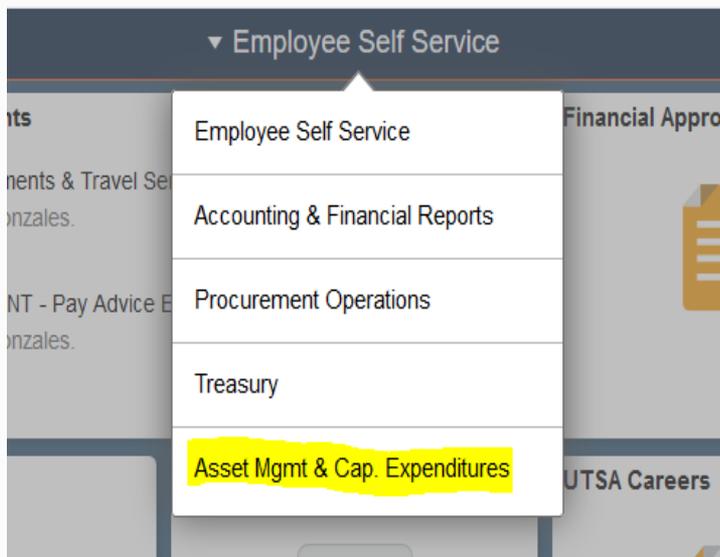
Approval Status

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

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

ESS Fluid Tile Navigation Approval Option

Using the Fluid Tile Navigation: Asset Mgmt & Cap. Expenditures > Asset UT Customizations > Asset Change Request



Asset Transfer Approval Action

- Review transaction *Asset Details* and *Activity Type*
- At the bottom of the Asset Change Request page, select the bright yellow **Approve** button
- Once the **Approve** button is selected, the Asset Transfer Approval flow will appear showing the transfer routing for others to approve

Asset Change Request

Asset Details

Transaction ID 000000001 Approval Status In Process
 Business Unit UTRGV
 Asset ID 00000093305 computer
 Asset Tag Number 664321
 Serial Number 987654321 Building # Sector
 Location 1001102 ACADEMIC SUPPORT FACILITIES A 100 1.102
 Location Effective Date 05/08/2018
 Department
 Project
 Current Custodian 6001144554 Valdez,Ruben
 Custodian Effective Date 05/08/2018
 Asset Class 204 Desktop CPU

Activity Type

Asset Transfer Asset Removal Asset Return Asset Transfer to Surplus

Date of Transfer 05/09/2018
 Location 1001102 ACADEMIC SUPPORT FACILITIES A
 Custodian Transfer Date 05/09/2018
 Department
 Custodian 6001245932 Guerra,David G

Comment

Asset Transfer Approval

TRANSACTION_ID=0000000001, BUSINESS_UNIT=UTRGV, ASSET_ID=00000093305:Pending

RGV-Asset Transfer

Approved ✓ Ruben Valdez
 Current Custodian
 05/09/18 - 3:37 PM

Pending ⌚ David Guerra - Trainer
 New Custodian

Not Routed 📁 Maribel Hernandez
 Fixed Asset Manager

Date Time: 05/09/2018 02:18 PM Status: Submitted Updated by: David Guerra - Trainer
 training - test - training - test - training of transfer of asset -
 Date Time: 05/09/2018 02:17 PM Status: Initial Updated by: David Guerra - Trainer
 Test transfer - workflow as part of training development - Test

Thank you!

The University of Texas at San Antonio

UTSA Financial Affairs