UTShare PeopleSoft 9.2
Transfer Workflow of UTSA Assets
From One DeptID to Another DeptID
Learning Objectives

• Navigate to Asset Change Request (ACR) in PeopleSoft
• How to process ACR
• How the ACR is approved
• Checking the status
• Surplus asset change requests
**Navigation**

- 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
Navigation

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

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

- Click **Add A New Value Tab**
- Business Unit: Enter **UTSA1**
- Enter **Tag Number**
- Now click **Add**

The Transaction ID and Asset Identification will populate default values
How to Process Asset Change Request

Review Asset Details

Asset Details page will now open with current info (Asset details)

- Verify you are transferring the correct asset

Note: Only ICPs with security access to the AM Module can submit requests; your name will populate the Requester field.
How to Process Asset Change Request in Activity Type

Select Asset Transfer
How to Process Asset Change Request

Enter Asset Transfer Information

- **Date of Transfer:** Enter today’s date
- **New Location:** Click on look up icon to search of location code
- **Custodian Transfer Date:** Enter today’s date
- **New Custodian:** Enter employee ID # or use lookup feature
- **New Department:** Enter gaining department ID
- **Comments:** Add rationale for transfer.

- **Select:** **Save or Submit**
  - **Save:** Holds the transaction in Initial status
  - **Submit:** Routes the transfer to the first approver.
How to Process Asset Change Request

Click: Submit Button

- **Transaction ID** number will be populated

- Transaction will be in a “**Pending**” state as it routes for multiple approvals

Inventory Department
How the ACR Is Approved

When the transaction is submitted it 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
How the ACR Is Approved (Cont’d)

Pending Approval Notifications

Four options to approve Asset Transfers:

• **Email Notification** — Department manager selects the email link and it will take them to the Asset Transfer Details page.

• **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
Department manager selects the link and it will take them directly to the Asset Transfer Details page.

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

Asset request for "Asset Transfer" needs your attention
Transaction ID 0000000064
Business Unit UTSA1
Asset ID: 00000000018
Tag Number 166686
Description DATA PROJECTOR: PANASONIC 350

Link: https://zaih-tst.utsystem.edu/psp/ZAIHTST/EMPLOYEE/ERP/c/UTZ_CUSTOMIZATIONS.URL/UTZ_ASSET_RQST_CMP.GBL?
Page=UTZ_ASSET_RQST_PNL&Action=U&TRANSACTION_ID=0000000064&BUSINESS_UNIT=UTSA1&ASSET_ID=00000000018&TAG_NUMBER=166686
How the ACR Is Approved (Cont’d)

Financial Approval Tile
Department manager will have to navigate to the Asset Change Request, enter the Business Unit, Tag Number and click SEARCH
How the ACR Is Approved (Cont’d)

Notification Flag
The department manager selects the link that will take them to the Asset Change Request, enter the Business Unit, Tag Number and click SEARCH.
How the ACR Is Approved (Cont’d)

Asset Transfer Page

• At the bottom of the Asset Transfer 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.
Checking the Status of the ACR

- Once you have submitted an ACR and you want to know the status of your pending request:
  - Navigate to Asset Change Request
  - Select Find an Existing Value tab
  - Enter
    - Business Unit: **UTSA1**
  - Select: **Search**
  - Sort by DeptID or Activity Type
Checking The Status of the ACR

Find An Existing Value

• If you need to check status on pending transfers:
  • Enter the your Department ID
  • Then Search
Transfer Workflow of UTSA Assets From One DeptID to Surplus
CLICK: Add a New Value Tab

- Enter
- Business Unit: UTSA1
- Tag Number: Enter if known or use look up icon
- Both the Transaction ID and Asset Identification will populate default values
In Activity Type

Select: Asset Transfer to Surplus
Enter Transfer Information

- **Sanitization Date:** Typically today’s date
- **Sanitation Method:** Use the drop down menu to select sanitization method
- **Date of Surplus:** Enter today’s date
- **New Location:** Will automatically populate CASURPLUS
- **Surplus Department ID:** Will automatically populate BFA016
- **Asset Condition:** Select from drop-down
- **Hazardous Asset:** Select if applicable
Verify All Content

- Asset Transfer
- Asset Removal
- Asset Return
- Asset Transfer to Surplus

Sanitization Date: 05/13/2020
Sanitization Method: Dismantled
Date of Surplus: 05/13/2020
New Location: CASURPLUS

Asset Condition: Fair
Hazardous Asset: No

Building: CAR
Sector: SURPLUS

Surplus Department ID: BFA016

CARSURPLUS WAREHOUSE
SURPLUS SALES AND SERVICE
Enter Transfer Information

If you enter comments and press SAVE, the comments will be appear beneath the Save & Submit buttons.
Click Submit Button

- **Transaction ID** number will be populated

- Transaction will be in a “Pending” state as it routes through for multiple approvals
Asset Approval Paths to Surplus

Depending on the Asset Class and ProjectID details, the Asset Transfer to Surplus routes to:

- **Grant/RSC Approvers:** If asset is Grant Funded or a Sponsored Project, it must be cleared through the RSC
  - **Principal Investigator (PI):** If UTSSP
  - **Project Manager (PM):** If UTSPF
- **Drone/Unmanned Aerial Vehicle:** Federal Aviation Administration (FAA) requires clearance by the UTSA Risk and Life Safety Approvers
- **Lab Safety & Compliance (ORIC):** If Lab or Medical Equipment (Asset Classes 5XX), the asset must be inspected and cleared through ORIC
Asset Approval Paths to Surplus (Cont’d)

Depending on the Asset Class and ProjectID details, the Asset Transfer to Surplus routes to:

- **UTSA Fleet Manager Approvers**: If Vehicle (Asset Classes 7XX) must be cleared in UT System Fleet Management System.
- **AM Surplus Administrative and Surplus Property** for final approvals.
- The Asset Transfers will either be:
  - **Approved (updated)** in the AM Module or
  - **Denied (terminated)** and returned back to the requestor.
Approval Paths to Surplus (Cont’d)

Depending on the asset details, the Asset Transfer to Surplus routes to:

**Grant/RSC Approvers:** If Grant funded/Sponsored Project
- **Principal Investigator (PI):** If UTSSP
- **Manager (PM):** If UTSPF

Options: Approved or Denied (terminated) and returned back to the requestor.
Approval Paths to Surplus (Cont’d)

Depending on the asset details, the Asset Transfer to Surplus routes to:

**Drone/Unmanned Aerial Vehicle:** FAA requires clearance by the UTSA Risk and Life Safety Approvers

- **Options:** Approved or Denied (terminated) and returned back to the requestor.

*Asset Transfer Approval-UTSA1*

```
TRANSACTION_ID=0000000074, BUSINESS_UNIT=UTSA1, ASSET_ID=00000001957, TAG_NUMBER=168644: Denied
```

- **Denied**
  - John Spencer DeLaHunt
  - RISK AND LIFE SAFETY OFFICE
  - 05/28/2020 - 2:29 PM

- **Terminated**
  - Multiple Approvers
  - Current Department Manager
  - Multiple Approvers
  - Surplus Administrative Approve
  - Multiple Approvers
  - Surplus Property Approvers
Approval Paths to Surplus (Cont’d)

Depending on the asset details, the Asset Transfer to Surplus routes to:

**Lab Safety & Compliance (ORIC):** If lab or medical equipment (Asset Classes 5XX) the asset must be inspected and cleared through ORIC

- **Options:** Approved or Denied (terminated) and returned back to the requestor.

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*Inventory Department*
Approval Paths to Surplus (Cont’d)

Depending on the asset details, the Asset Transfer to Surplus routes to:

**UTSA Fleet Manager Approvers:** If vehicle (Asset Classes 7XX)
- **Options:** Approved or Denied (terminated) and returned back to the requestor.

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**Asset Transfer Approval-UTSA1**

![Approval Path Diagram]

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**Asset Transfer Approval-UTSA1**

![Approval Path Diagram]
Once APPROVED, Verify Update in AM Module
Navigate to Basic Add Page

• To see the update navigate: **Asset Management > Asset Transactions > Owned Assets > Basic Add**

• For Locations transfers, navigate to Location/Comments/Attributes page

• For location and custodian Tab
Thank you!

The University of Texas at San Antonio

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