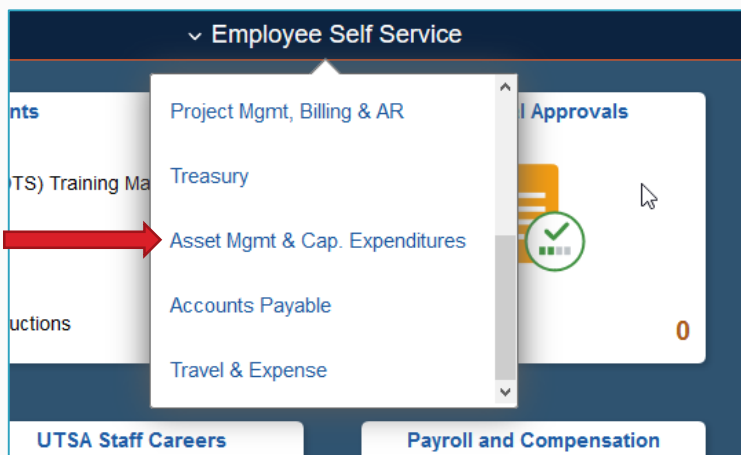


Update Asset User (Custodian) in PeopleSoft Asset Management & Capital Expenditures (AM) Module

Job Aid

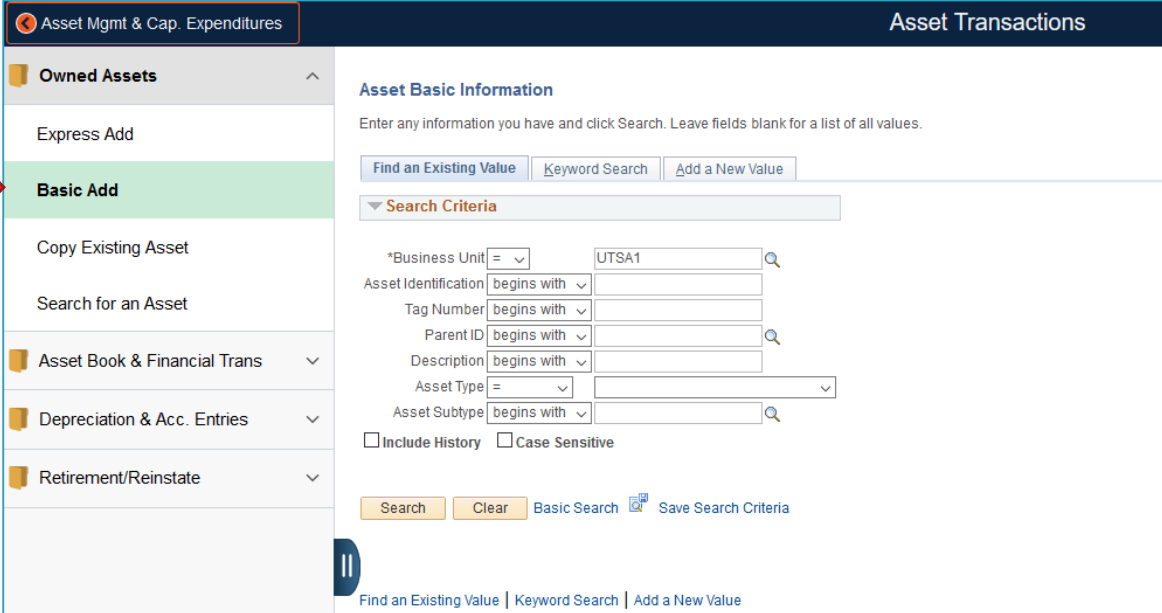
User (Custodian) Change

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



User (Custodian) Change (cont'd)

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



The screenshot shows the 'Asset Transactions' interface. On the left, a sidebar menu under 'Owned Assets' has 'Basic Add' highlighted in green, with a red arrow pointing to it. The main content area is titled 'Asset Basic Information' and contains a search form. The form includes a 'Search Criteria' section with the following fields:

- *Business Unit: dropdown menu, value: UTSA1
- Asset Identification: dropdown menu (begins with), value: [blank]
- Tag Number: dropdown menu (begins with), value: [blank]
- Parent ID: dropdown menu (begins with), value: [blank]
- Description: dropdown menu (begins with), value: [blank]
- Asset Type: dropdown menu (=), value: [blank]
- Asset Subtype: dropdown menu (begins with), value: [blank]

There are also checkboxes for 'Include History' and 'Case Sensitive'. At the bottom of the search form, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. Below the search form, there is a navigation bar with the text 'Find an Existing Value | Keyword Search | Add a New Value'.

User (Custodian) 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

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

User (Custodian) Change (cont'd)

To process a **user (custodian) change**, select the “Manufacture/License/Custodian” 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

Manufacturer Information

Serial ID

Manufacturer ID

Manufacturer Name

Model

Product Version

Plant

VIN

Production Date

Contact

SKU

Physical Life Information

In Service Date

Life Expectancy Yrs

Life Expectancy Mths

User (Custodian) Change (cont'd)

Before entering a new user(custodian), click on the plus (+) icon in the “Custodian Information” tab to automatically populate the current effective date.

The screenshot displays the "Custodian Information" tab in the UTSA Business Affairs system. The "Effective Date" field is circled in red in the top screenshot and updated to 09/22/2021 in the bottom screenshot after clicking the plus (+) icon. An orange callout box highlights the new date. A red hand icon is overlaid on the "Chartfields" section.

Notice the new date after clicking on the plus (+) icon.

Chartfields

Fund Code	3105	DES Designated Tuition
Department	BFA001	FINANCIAL AFFAIRS
Cost Center	DXM003	FINANCIAL AFFAIRS ADMIN OPS
Function	700	Institutional Support
Program Code		
Project		

IMPORTANT: Never change or update any fields in the “Chartfields” section!

User (Custodian) Change (cont'd)

Enter the employee ID# of the new user (custodian) in the “Empl ID” field.

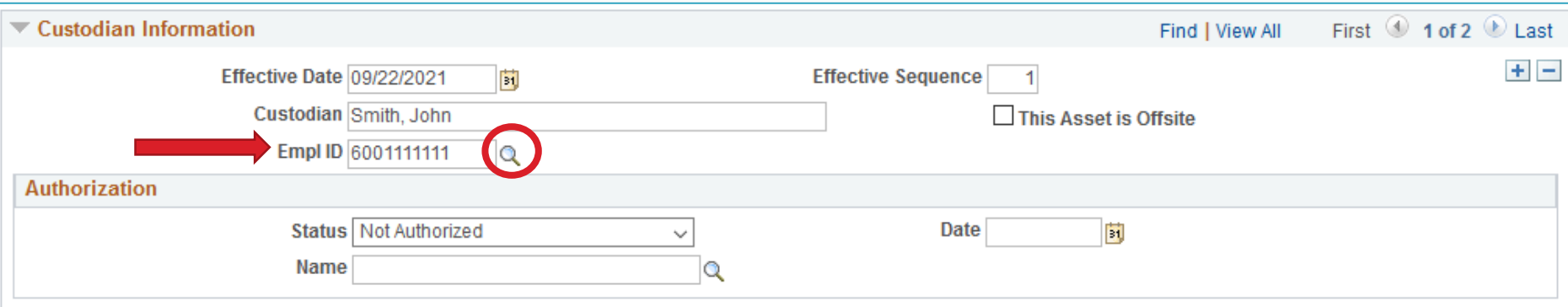
Click on the magnifying glass icon next to the “Empl ID” field to search for the employee if you do not have the Emp ID number.

Custodian Information Find | View All First 1 of 2 Last

Effective Date	09/22/2021	Effective Sequence	1
Custodian	Smith, John	<input type="checkbox"/> This Asset is Offsite	
Empl ID	6001111111		

Authorization

Status	Not Authorized	Date	
Name			



User (Custodian) Change (cont'd)

In the “Look Up” box, type the number 6 in the “Employee ID” field to narrow the search to UTSA employees only. Type in the last name and click the “Look Up” button. Search for the employee name and click on it.

Look Up Empl ID

×
Help

Employee ID

Name

Last Name

[Basic Lookup](#)

No matching values were found.

Look Up Empl ID

×
Help

Employee ID

Name

Last Name

[Basic Lookup](#)

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Employee ID	Name	Last Name
600	DO NOT USE,DO NOT USE	DONOTUSE
600100000		
600100000		
600100004		
600100005		
600100006		

User (Custodian) Change (cont'd)

Click "Save" to save your changes.

Custodian Information Find | View All First 1 of 2 Last

Effective Date

Custodian

Empl ID

Authorization

Status Date

Name

Chartfields

Fund Code DES Designated Tuition

Department FINANCIAL AFFAIRS

Cost Center FINANCIAL AFFAIRS ADMIN OPS

Function Institutional Support

Program Code

Project

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