

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

Find an Existing Value	Add a New Value		
Search Criteria			
Transaction ID begins Business Unit begins sset Identification begins Approval Status =	with V	ू ् ् ्	
Search Clear E	Basic Search 📴 Save	Search Criteria	

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

Asset Cha	nge Request
Find an Exis	ting Value Add a New Value
Transact Busines Asset Identifi Tag Nu	on ID NEXT s Unit UTSA1 cation 00000000018 × imber 166686
Add	
ind an Existi	ng Value Add a New Value

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.

set Details				
Transaction ID: NEXT		Approval Status:	nitial	
Business Unit: UTSA1	Princ	iple Investigator:		
Asset ID: 00000000018 DATA PROJECTOR: PANASONI	IC 350			
Asset Tag Number: 166686		Building	Sector	
Location: FS2516 Frio Street Bld 2.516		FS	2.516	
Location Eff Date: 04/25/2019	Project ID:			
Department: AIT006 OIT LEARNING TECHNOLOGIES	Profile ID:	218CTL41		
Current Custodian: 6001021669 Tobares, Joe G	Serial ID:	SC4136048		
Cust Eff Date: 06/12/2014	Acquisition Date:	06/11/2014		
Asset Class: 218 Data Projectors				
ctivity Type				
Asset Transfer OAsset Removal OAsset Return OAs	set Transfer to Su	rplus		
Date of Transfer:		Building	Sector	
New Location:				
Custodian Transfer Date:				
New Custodian:				
New Department:				
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How to Process Asset Change Request in Activity Type

Asset Change Request

Select Asset Transfer

Asset Details					
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Business Unit:	UTSA1	Princi	ple Investigator:		
Asset ID:	00000000018 DATA PROJECTOR: PANAS	ONIC 350			
Asset Tag Number:	166686		Building	Sector	
Location:	FS2516 Frio Street Bld 2.516		FS	2.516	
Location Eff Date:	04/25/2019	Project ID:			
Department:	AIT006 OIT LEARNING TECHNOLOGIES	Profile ID:	218CTI 41		
Current Custodian:	6001021669 Tobares,Joe G	Serial ID:	SC4136048		
Cust Eff Date:	06/12/2014	Acquisition Date:	06/11/2014		
Asset Class:	218 Data Projectors				
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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.

● Asset Transfer ○ Asset Removal ○ Asset Return ○ Asset Transfer to S	Surplus		
Date of Transfer: 05/11/2020	Building	Sector	
New Location: 000-0F4 Parking lot F4	000_0F4		
Custodian Transfer Date: 05/11/2020 🗵			
New Custodian: 1000369350 QSandoval, Deborah K			
New Department: 315210 Gracilities Mgmt_Housing			
Comments			
to replace			

How to Process Asset Change Request

Click: Submit Button

• Transaction ID number will be populated

Asset Transfer Approval-UTSA1

TRANSACTION_ID=0000000064, BUSINESS_UNIT=UTSA1, ASSET_ID=00000000018, TAG_NUMBER=166686:Pending
UTSA1-Asset Transfer

 Transaction will be in a "Pending" state as it routes for multiple approvals

Asset Transfer Approval-UTSA1

TRANSACTION_ID=000000064, BUSINESS_UNIT=UTSA1, ASSET_ID=00000000018, TAG_NUMBER=166686:Pending



Date Time: 05/12/2020 04:40 PM Status: Submitted Updated by: Sanjana Gautharaju - UTShare TEST

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



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.

PeopleSoft-Action Required-UTSA1 Asset Transfer. Approval for Asset ID "00000 0000018" and Tag Number "166686"

i	Getting too much email? Unsubscribe
w	Workflow@utsystem.edu \checkmark \checkmark \checkmark \rightarrow \cdots Tue 5/12/2020 4:40 PM \checkmark \checkmark \checkmark \checkmark \checkmark \rightarrow \cdots To: Ana.Rodriguez1@utsa.edu.utz; Cynthia.Orth@utsa.edu.utz +2 others
	Asset request for "Asset Transfer" needs your attentionTransaction ID000000064Business UnitUTSA1Asset ID:00000000018Tag Number166686DescriptionDATA 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&BUSINE SS_UNIT=UTSA1&ASSET_ID=00000000018&TAG_NUMBER=166686

Financial Approval Tile

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

	✓ Employee Self Service							
UTA Announcements There are no	articles available.	UTSA Announcements There are no a	rticles available.					
Financials Approvals	HRMS Approvals	UTSYS Careers	My Reports ORACLE PEOPLESOFT					

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



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

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U00000076 UTSA1 000000012 17/6213 In Process ASC008 Surplus 000000056 UTSA1 0000000014122 17/9300 Denied ASC008 Surplus 000000056 UTSA1 000000014122 17/9300 Denied ASC008 Surplus 000000056 UTSA1 040000014122 17/9300 Denied ASC008 Surplus 00000076 UTSA1 045766 Complete ASC008 Surplus 00000076 UTSA1 026620-1 026620 Complete ASC008 Surplus 000000014 UTSA1 026620-1 026620 Complete ASC008 Transfer 000000014 UTSA1 033739-2 033739 Complete ASC008 Transfer 000000017 UTSA1 122798-2 122798 In Process ASC008 Transfer 000000017 UTSA1 122798-2 122798 RComplete ASC008 Transfer	0000000039	UTSA1	00000002496	169074	Complete	ASC008	Proster
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O000000000 OTSAT1 040000001422 IT9500 Defined ASC000 Transfer 000000007 UTSA1 145786-1 145786 Complete ASC008 Surplus 000000073 UTSA1 026620-1 026620 Complete ASC008 Transfer 000000013 UTSA1 0000000644 167288 Initial ASC008 Surplus 000000017 UTSA1 033739-2 033739 Complete ASC008 Transfer 000000017 UTSA1 122798-2 122798 In Process ASC008 Transfer 000000017 UTSA1 122798-2 122798 In Process ASC008 Transfer	0000000055	UTSAT	00000001021	10/020	In Process	ASC008	Transfer
O00000000 UTSA1 143760-1 <	0000000003	UTSAT	145796 1	1/9930	Complete	ASC008	Purplus
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	0000000014	UTSA1 UTSA1	00000000644 033739-2 122798-2	167288 033739 122798	Initial Complete	ASC008 ASC008 ASC008	Transfer Surplus Transfer Transfer

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

	Find an Existing V	alue Add	aN	Jew Value		
			an			
	• Search Chief	a				
	Transaction ID	begins with	\sim			
	Business Unit	begins with	\sim	UTSA1	Q	
ŀ	Asset Identification	begins with	\sim		Q	
	Tag Number	begins with	\sim		Q	
	Approval Status	= ~]			\sim
	Department	begins with	\sim	BFA005	Q	
	Activity Type	= ~]			\sim



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

Find an Existing	g Value	Add a New Value	•
Transaction	ID NEXT		
Business U	nit UTSA1	Q	
Asset Identificati	on 000000	000018 × 🔍	
Tag Numb	er 166686	3	
Add			

Ohanna Damuaat

In Activity Type

Select: Asset Transfer to Surplus

Asset Change Request **Asset Details** Approval Status: Initial Transaction ID: NEXT Business Unit: UTSA1 Principle Investigator: Asset ID: 00000000018 DATA PROJECTOR: PANASONIC 350 Asset Tag Number: 166686 Building Sector Athl Temp Offc Bld 1.118 Location: A21118 AT2 1.118 Location Date: 05/12/2020 Project ID: Departmen AT006 OIT LEARNING TECHNOLOGIES Profile ID: 218CTL41 Current Custodian: 600 Porter.Cassandra Z760 Serial ID: SC4136048 Cust Eff Date: 05/12/20 Acquisition Date: 06/11/2014 Asset Class: 218 Data Project Requester: **Activity Type** O Asset Transfer O Asset Removal O Asset Return O Asset Transfer to Surplus 31 Asset Condition: Sanitization Date: Hazardous Asset: Sanitization Method: 31 Building Sector Date of Surplus: Q New Location: Q Surplus Department ID Comments 7 Save Submit

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

	OAsset Transfer OAsset Removal O	Asset Return OAsset Transfer to Surp	olus	
	Sanitization Date: 05/13/2020	Asset Condition: Fair Hazardous Asset:	V	
1	Date of Surplus: 05/13/2020	CARSURPLUS WAREHOUSE	Building CAR	Sector SURPLUS
	Surplus Department ID BFA016	SURPLUS SALES AND SERVICE		

- 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	lus	
Sanitization Date: 05/13/2020	Asset Condition: Fair Hazardous Asset:	\sim	
Date of Surplus: 05/13/2020 3	CARSURPLUS WAREHOUSE	Building CAR	Sector SURPLUS
Surplus Department ID BFA016	SURPLUS SALES AND SERVICE		

Enter Transfer Information

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

	Asset Transfer to Surplus
Sanitization Date:	
Sanitization Method:	
Date of Surplus:	Building Sector
New Location:	ENTER COMMENT
	INFORMATION
nments	
	<u>رم</u>

Click Submit Button

• Transaction ID number will be populated

Asset Transfer Approval-UTSA1

TRANSACTION_ID=000000064, BUSINESS_UNIT=UTSA1, ASSET_ID=00000000018, TAG_NUMBER=166686:Pending

UTSA1-Asset Transfer

 Transaction will be in a "Pending" state as it routes through for multiple approvals

Asset Transfer Approval-UTSA1



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

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.

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

Asset Transfer Approval-UTSA1 TRANSACTION_ID=0000000116, BUSINESS_UNIT=UTSA1, ASSET_ID=000000008608, TAG_NUMBER=174555:Pending UTSA1-Asset Transfer Pendina Not Routed Not Routed Not Routed Not Routed Not Routed Eidel Santamaria Fidel Santamaria Multiple Approvers Charles J Wilson Multiple Approvers Multiple Approvers Grants Central Office Current Department Manager Principal Investigator Project Manager Surplus Administrative Approve Surplus Property Approvers Θ Manager (PM): If UTSPF Asset Transfer Approval-UTSA1 TRANSACTION ID=0000000087, BUSINESS UNIT=UTSA1, ASSET ID=00000001204, TAG NUMBER=168085:Pending UTSA1-Asset Transfer Pending Not Routed Not Routed Not Routed Becky Renee Sanchez Joe G Tobares Multiple Approvers Multiple Approvers Project Manager Current Department Manager Surplus Administrative Approve Surplus Property Approvers 0

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

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



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.

Asset Transfer Approval-UTSA1



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.

Asset Transfer Approval-UTSA1

TRANSACTION_ID=0000000065, BUSINESS_UNIT=UTSA1, ASSET_ID=00000006002, TAG_NUMBER=400761:Approved



Asset Transfer Approval-UTSA1





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

General Information Operation/Maintenance Asset Acquisition Detail Location/Comments/Attributes Manufacture/L Unit UTSA1 Asset ID 00000000018 DATA PROJECTOR: PANASONIC 350 Tag 166686 In Set Location						
Unit UTSA1 Asset ID 00000000018 DATA PROJECTOR: PANASONIC 350 Tag 166686 In Set • Location Q Effective Date 05/12/2020 × III Effective Sequence In Set Location A21118 A21118 Effective Sequence In Set Acata ID Q Address 1 UTSA In Set In Set Address 1 UTSA UTSA Jurisdiction Jurisdiction State TX Texas Sector 1.118 Geo Code Document In Set Postal 78249 Building T1006 Latitude Latitude	General Information Ope	eration/Maintenance	Asset Acquisition Detail	Location/Comments/Attrib	utes	Manufacture/L
Location Effective Date O5/12/2020 × Ffective Sequence Location A21118 Area ID Atrea ID Atrea ID Address 1 UTSA City San Antonio County Bexar TX Texas Sector 1.118 Country USA United States Postal 78249 Geo Code Document Building T1006 Latitude	Unit UTSA1 A	sset ID 000000000)18 DATA PROJECTOR: P	ANASONIC 350 Tag	166686	In Se
Effective Date 05/12/2020 × III Location A21118 Area ID A21118 Area ID Control Address 1 UTSA City San Antonio County Bexar State TX TX Texas Geo Code Document Buildina T1006 Latitude	 Location 					Q
Location A21118 Amm temp one Bid 1.118 Area ID Amm temp one Bid 1.118 Address 1 UTSA City San Antonio Country Bexar Jurisdiction State TX TX Texas Geo Code Document Building T1006	Effective Date	05/12/2020 × 📖	\leftarrow	Effective Sequence		
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County Bexar Jurisdiction State TX Texas Sector 1.118 Country USA United States Postal 78249 Geo Code Image: Comment of the state of the s	City	San Antonio				
State TX Texas Sector 1.118 Country USA United States Postal 78249 Geo Code Image: Comparison of the state of the	County	Bexar		Jurisdiction		
Country USA United States Postal 78249 Geo Code Image: Comparison of the state of the stat	State	TX Texas		Sector	1.118	
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Buildina T1006 Latitude	Document					
	Buildina	T1006		Latitude		

Custodian Information		Q 1 of 1				
Effective Date	05/12/2020	Effective Sequence 2				
Custodian F	Porter,Cassandra	☐ This Asset is Offsite				
Empl ID	6001017760 Q					
Authorization						
Status	V	Date				
Name	٩					
'hartfields						
Fu	und Code 3100	Q DES Organized Act Rel to Instr				
De	partment BFA005	CAPITAL ASSET MANAGEMENT				
Co	st Center DAX030	Q LEARN TECH ASF				
	Function 100	Q. Instruction				



Thank you!

The University of Texas at San Antonio

Office of Financial Affairs