

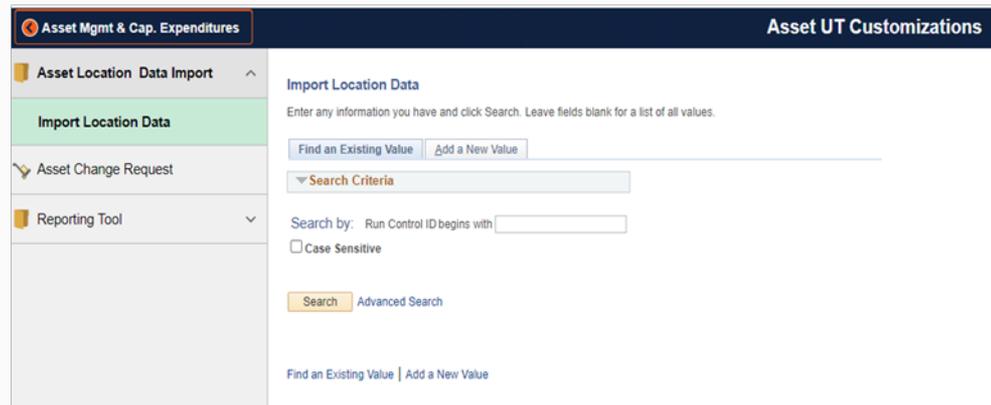
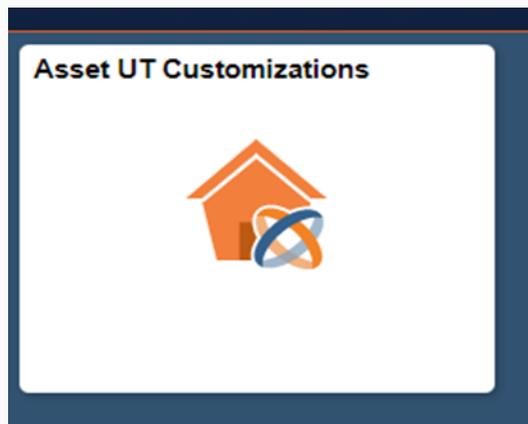
UTShare PeopleSoft 9.2 Transfer Workflow of UTSA Assets From One DeptID to Another DeptID

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

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 

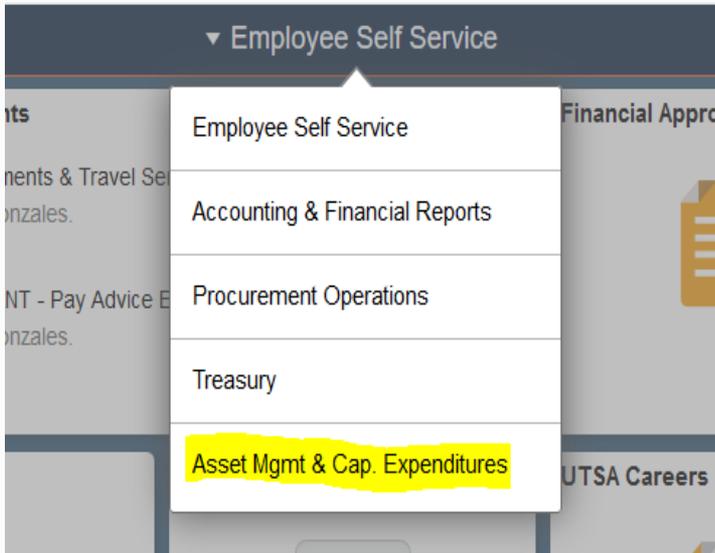
Approval Status

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

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

Navigation

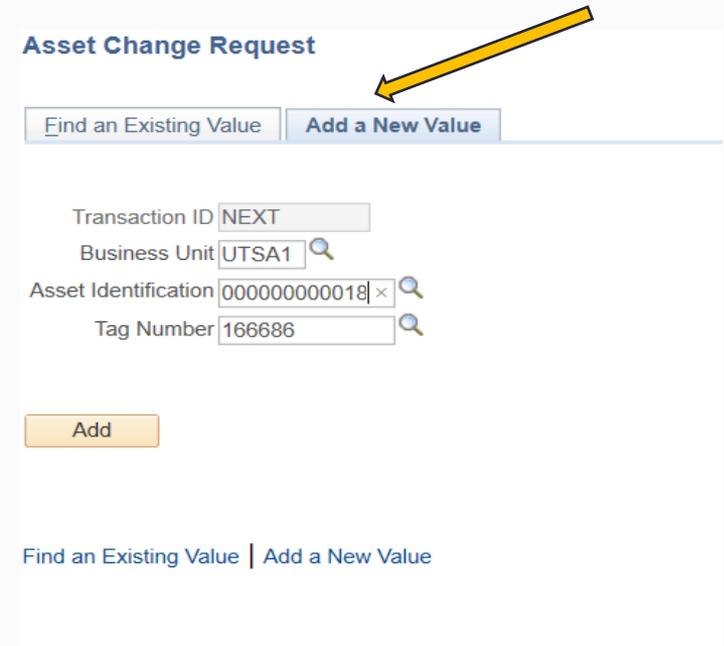
Using the Fluid Tile Navigation: Asset Mgmt & Cap. Expenditures > Asset UT Customizations > Asset Change Request



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 Change Request

Find an Existing Value | **Add a New Value**

Transaction ID

Business Unit

Asset Identification

Tag Number

Find an Existing 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.

Asset Change Request

Asset Details

Transaction ID: NEXT		Approval Status: Initial	
Business Unit: UTSA1		Principle Investigator:	
Asset ID: 00000000018 DATA PROJECTOR: PANASONIC 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			
Requester:			

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Date of Transfer:	<input type="text"/>	Building	Sector
New Location:	<input type="text"/>		
Custodian Transfer Date:	<input type="text"/>		
New Custodian:	<input type="text"/>		
New Department:	<input type="text"/>		

Comments

How to Process Asset Change Request in Activity Type

Select
Asset Transfer



Asset Change Request

Asset Details

Transaction ID: NEXT	Approval Status: Initial
Business Unit: UTSA1	Principle Investigator:
Asset ID: 00000000018 DATA PROJECTOR: PANASONIC 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	
Requester:	

Activity Type

Asset Transfer Asset Removal Asset Return Asset Transfer to Surplus

Date of Transfer: <input type="text"/>	Building Sector
New Location: <input type="text"/>	
Custodian Transfer Date: <input type="text"/>	
New Custodian: <input type="text"/>	
New Department: <input type="text"/>	

Comments

Save Submit

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.

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Date of Transfer:	<input type="text" value="05/11/2020"/>		Building
			Sector
New Location:	<input type="text" value="000-0F4"/>	<input type="text" value="Parking lot F4"/>	000_OF4
Custodian Transfer Date:	<input type="text" value="05/11/2020"/>		
New Custodian:	<input type="text" value="1000369350"/>	<input type="text" value="Sandoval, Deborah K"/>	
New Department:	<input type="text" value="315210"/>	<input type="text" value="Facilities Mgmt_Housing"/>	

Comments

to replace

How to Process Asset Change Request

Click: Submit Button

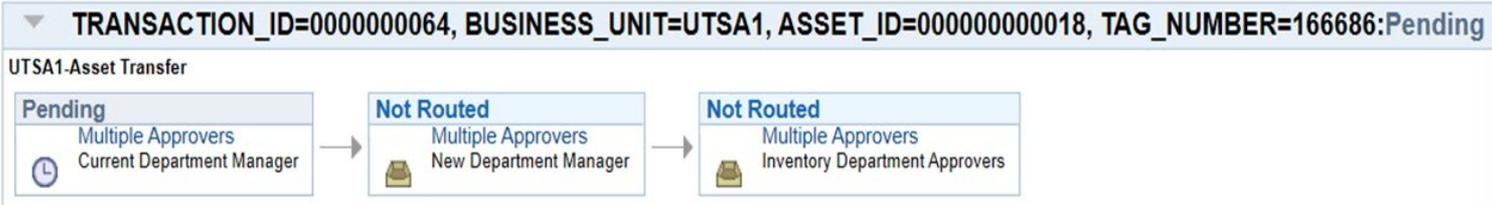
- **Transaction ID** number will be populated

Asset Transfer Approval-UTSA1

TRANSACTION_ID=0000000064, BUSINESS_UNIT=UTSA1, ASSET_ID=000000000018, TAG_NUMBER=166686:Pending
UTSA1-Asset Transfer

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

Asset Transfer Approval-UTSA1



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

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
--	---	---	---	---

▶ **Comments**

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



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

How the ACR Is Approved (Cont'd)

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 "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

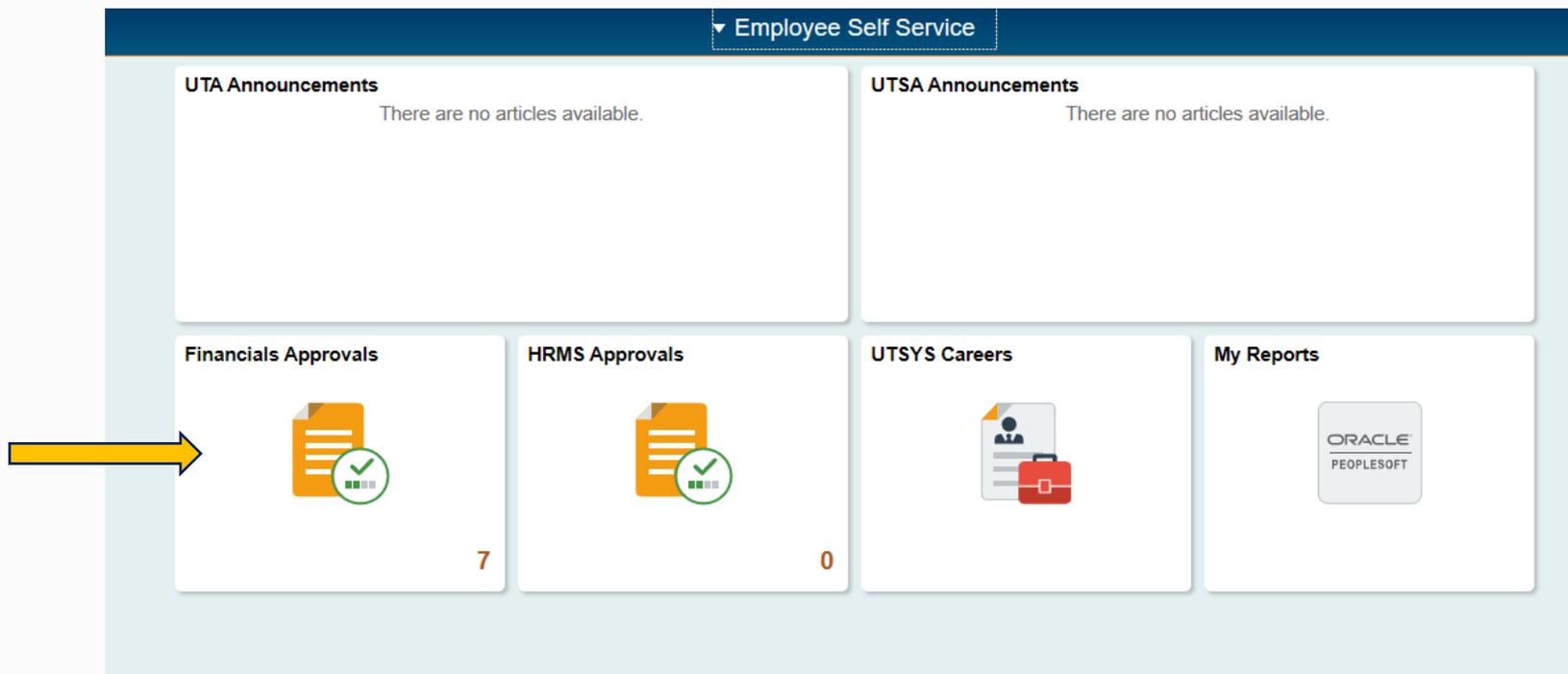
Transaction ID	0000000064
Business Unit	UTSA1
Asset ID:	000000000018
Tag Number	166686
Description	DATA PROJECTOR: PANASONIC 350

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

How the ACR Is Approved (Cont'd)

Financial Approval Tile

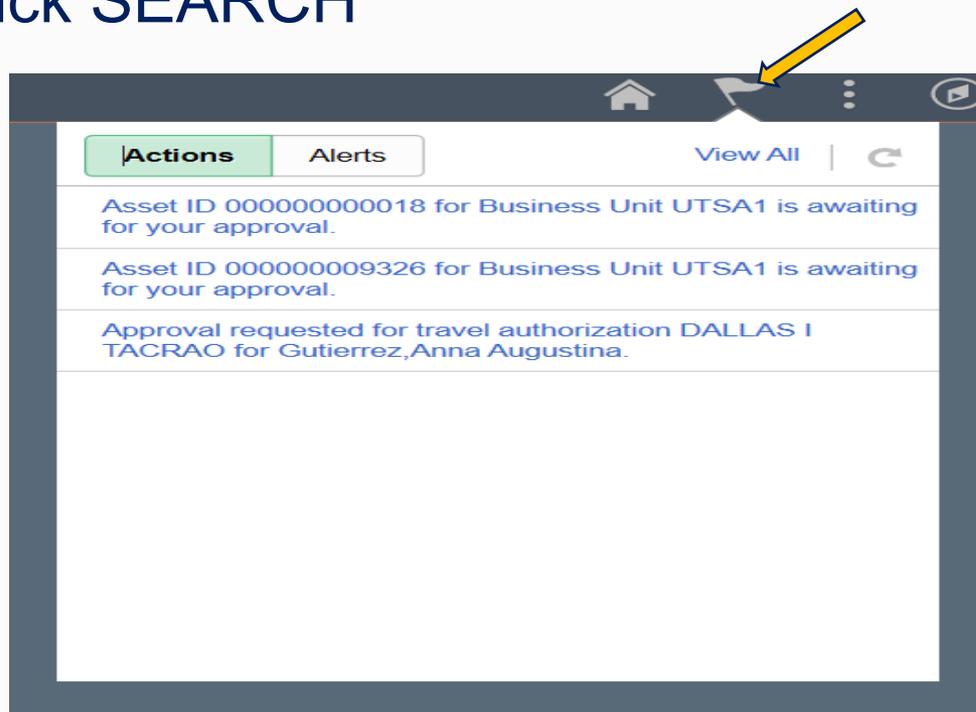
Department manager will have to navigate to the Asset Change Request, enter the Business Unit, Tag Number and click SEARCH



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.

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

Comments

Approve Deny Return

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

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

Asset UT Customizations

Asset Change Request

Enter any information you have and click Search. [Link for a list of all values.](#)

Find an Existing Value
New Value

Search Criteria

Transaction ID

Business Unit

Asset Identification

Tag Number

Approval Status =

Department

Activity Type =

Search Results

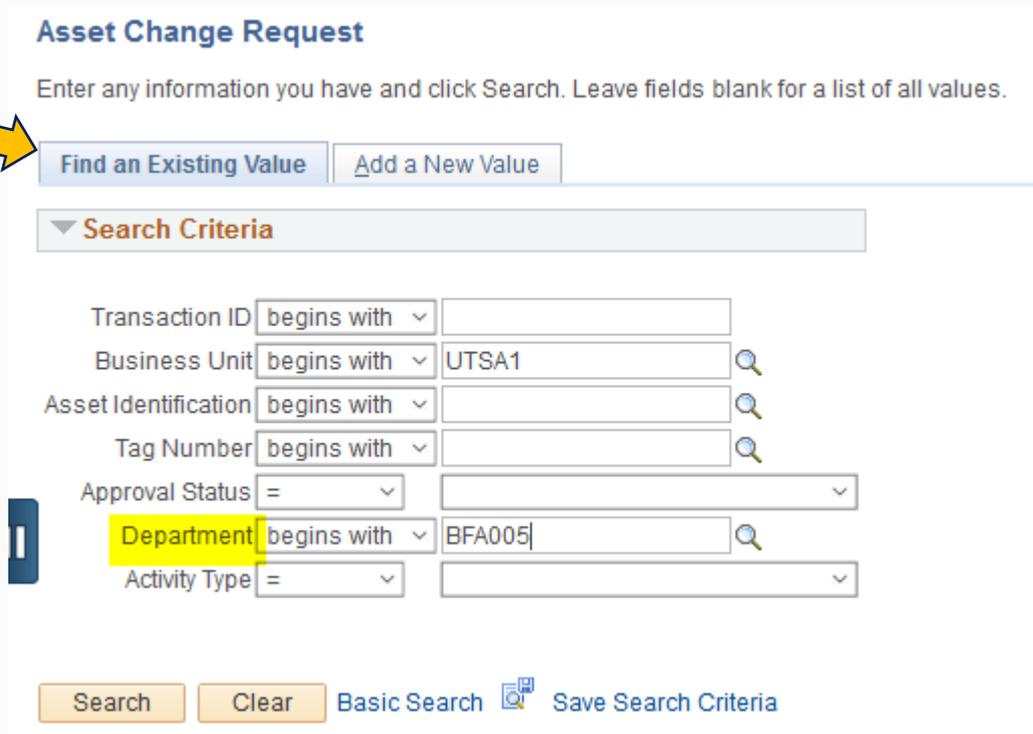
View All First 1-67 of 67 Last

Transaction ID	Business Unit	Asset Identification	Tag Number	Approval Status	Department	Activity Type
000000062	UTSA1	156529-1	156529	In Process	ABS012	Surplus
000000035	UTSA1	00000009226	175364	In Process	AEN001	Transfer
000000032	UTSA1	00000003200	169609	In Process	AGS001	Transfer
000000120	UTSA1	00000002090	167866	In Process	AIT006	Surplus
000000086	UTSA1	00000001205	168086	In Process	AIT006	Transfer
000000087	UTSA1	00000001204	168085	In Process	AIT006	Surplus
000000072	UTSA1	00000002865	169510	Denied	AIT012	Surplus
000000071	UTSA1	139764-1	139764	Denied	AIT012	Surplus
000000040	UTSA1	154910-10	154910	Denied	ASC007	Transfer
000000041	UTSA1	154910-9	154910	In Process	ASC007	Transfer
000000038	UTSA1	400882-1	400882	In Process	ASC007	Transfer
000000039	UTSA1	00000002496	169074	Complete	ASC008	Transfer
000000078	UTSA1	000000010012	176213	In Process	ASC008	Surplus
000000055	UTSA1	000000001021	167520	In Process	ASC008	Surplus
000000003	UTSA1	000000014122	179930	Denied	ASC008	Transfer
000000076	UTSA1	145786-1	145786	Complete	ASC008	Surplus
000000033	UTSA1	026620-1	026620	Complete	ASC008	Transfer
000000073	UTSA1	00000000644	167288	Initial	ASC008	Surplus
000000014	UTSA1	033739-2	033739	Complete	ASC008	Transfer
000000017	UTSA1	122798-2	122798	In Process	ASC008	Transfer
000000018	UTSA1	00000009322	175443	Complete	ASC008	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



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	begins with	<input type="text"/>
Business Unit	begins with	UTSA1 <input type="text"/>
Asset Identification	begins with	<input type="text"/>
Tag Number	begins with	<input type="text"/>
Approval Status	=	<input type="text"/>
Department	begins with	BFA005 <input type="text"/>
Activity Type	=	<input type="text"/>

[Basic 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

Asset Change Request

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

Transaction ID

Business Unit 

Asset Identification 

Tag Number 

[Add](#)

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

In Activity Type

Select:
Asset Transfer to Surplus

Asset Change Request

Asset Details

Transaction ID: NEXT	Approval Status: Initial
Business Unit: UTSA1	Principle Investigator:
Asset ID: 000000000018 DATA PROJECTOR: PANASONIC 350	
Asset Tag Number: 166686	Building: AT2 Sector: 1.118
Location: A21118 Athl Temp Offc Bld 1.118	
Location Eff Date: 05/12/2020	Project ID:
Department: AIT006 OIT LEARNING TECHNOLOGIES	Profile ID: 218CTL41
Current Custodian: 600727760 Porter, Cassandra	Serial ID: SC4136048
Cust Eff Date: 05/12/2020	Acquisition Date: 06/11/2014
Asset Class: 218 Data Projector	
Requester:	

Activity Type

Asset Transfer Asset Removal Asset Return Asset Transfer to Surplus

Sanitization Date: Asset Condition:

Sanitization Method: Hazardous Asset:

Date of Surplus: Building: Sector:

New Location:

Surplus Department ID

Comments

Save Submit

Enter Transfer Information

- **Sanitization Date:**
Typically today's date
- **Sanitization 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

Inventory type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Sanitization Date: 05/13/2020 ³¹
 Asset Condition: Fair

Sanitization Method: Dismantled/
 Hazardous Asset:

Date of Surplus: 05/13/2020 ³¹

New Location: CASURPLUS ^Q
 CARSURPLUS WAREHOUSE
 Building: CAR
 Sector: SURPLUS

Surplus Department ID: BFA016 ^Q
 SURPLUS SALES AND SERVICE

Verify All Content

Asset Transfer Asset Removal Asset Return Asset Transfer to Surplus

Sanitization Date:  Asset Condition: 

Sanitization Method:  Hazardous Asset:

Date of Surplus:  Building Sector

New Location:  CARSURPLUS WAREHOUSE CAR SURPLUS

Surplus Department ID  SURPLUS SALES AND SERVICE

Enter Transfer Information

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

Activity Type

Asset Transfer Asset Removal Asset Return Asset Transfer to Surplus

Sanitization Date:

Sanitization Method:

Date of Surplus:

New Location:

Building Sector

Comments

ENTER COMMENT INFORMATION

Click Submit Button

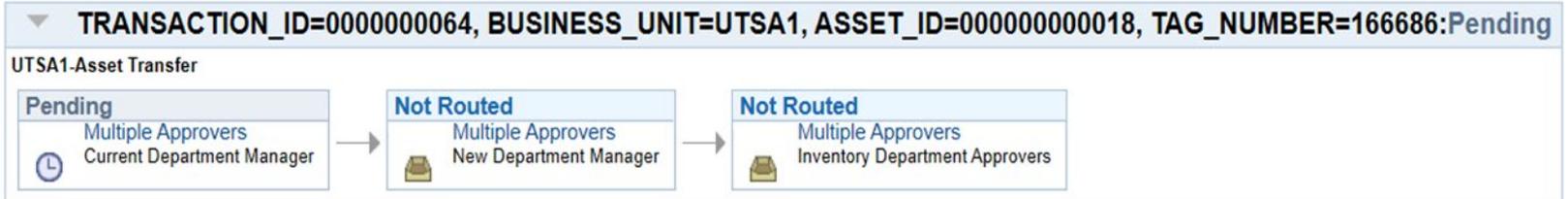
- **Transaction ID** number will be populated

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 through for multiple approvals

Asset Transfer Approval-UTSA1



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



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.

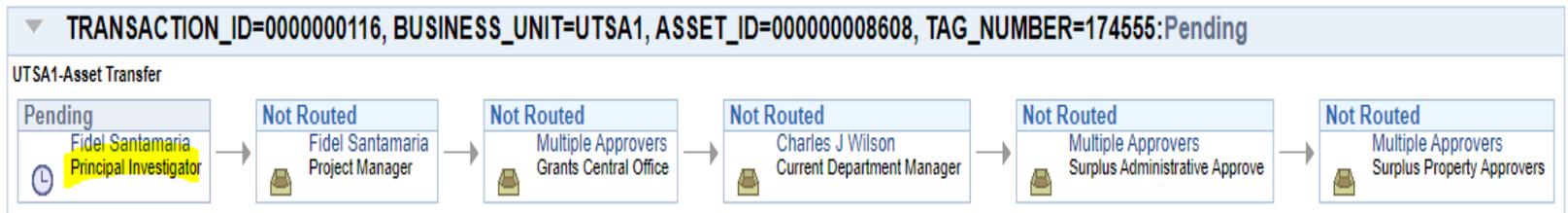
Approval Paths to Surplus (Cont'd)

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

Grant/RSC Approvers: If Grant funded/Sponsored Project

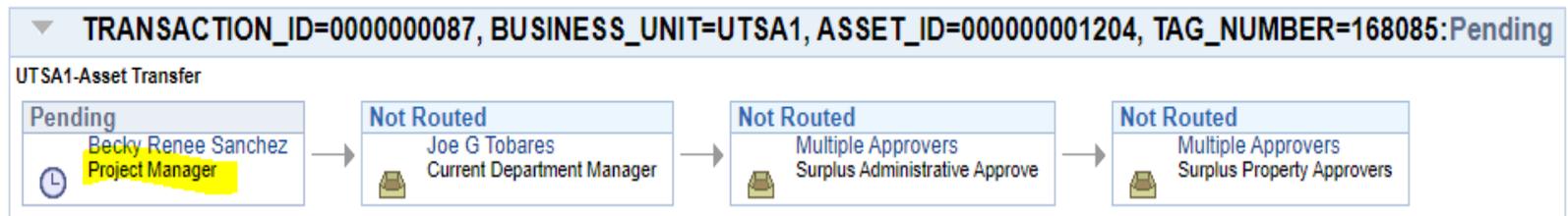
- **Principal Investigator (PI): If UTSSP**

Asset Transfer Approval-UTSA1



- **Manager (PM): If UTSPF**

Asset Transfer Approval-UTSA1



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

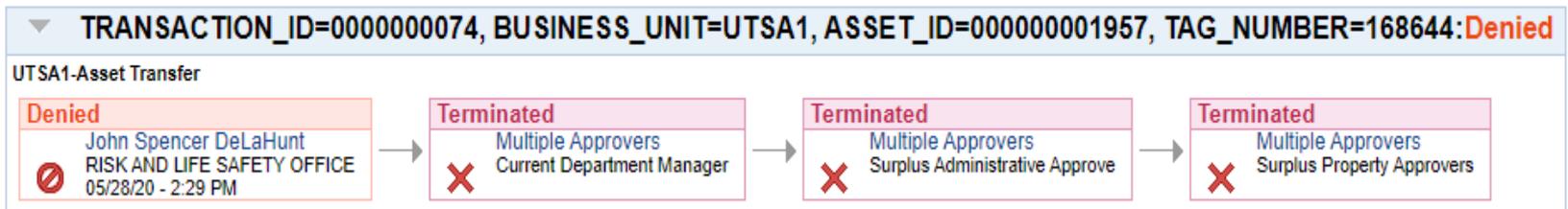
Approval Paths to Surplus (Cont'd)

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



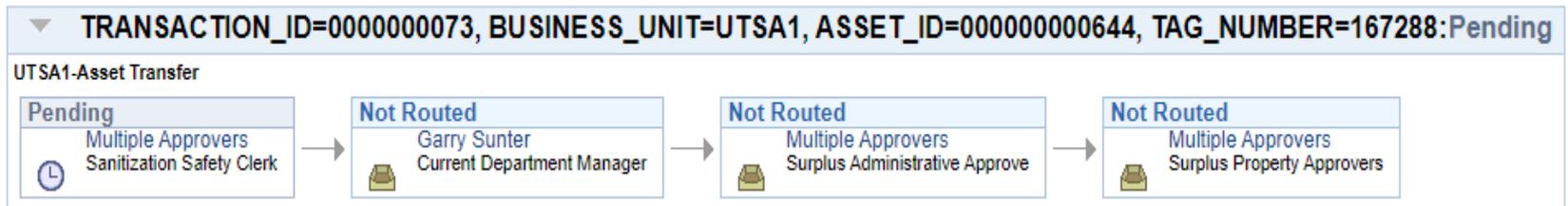
Approval Paths to Surplus (Cont'd)

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.

Asset Transfer Approval-UTSA1



Approval Paths to Surplus (Cont'd)

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

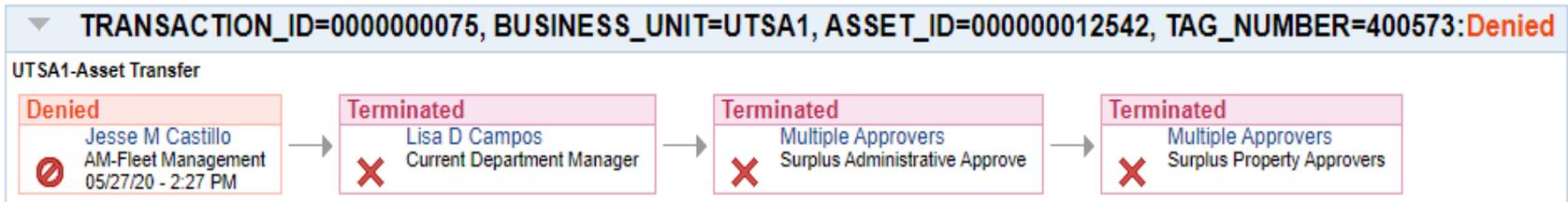
UTSA Fleet Manager Approvers: If vehicle (Asset Classes 7XX)

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

Asset Transfer Approval-UTSA1



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 000000000018 DATA PROJECTOR: PANASONIC 350 Tag 166686 In Se

▼ Location Q |

Effective Date  Effective Sequence

Location  Ann Temp One Bld 1.118

Area ID 

Address 1 UTSA
 City San Antonio
 County Bexar Jurisdiction
 State TX Texas Sector 1.118
 Country USA United States Postal 78249

Geo Code
 Document

Building T1006 Latitude

Custodian Information Q | 1 of 1

Effective Date  Effective Sequence

Custodian  This Asset is Offsite

Empl ID 

Authorization

Status Date 

Name 

Chartfields

Fund Code  DES Organized Act Rel to Instr

Department  CAPITAL ASSET MANAGEMENT

Cost Center  LEARN TECH ASF

Function  Instruction

Thank you!

The University of Texas at San Antonio

UTSA Financial Affairs