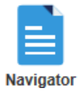
HOW TO RUN AN INITIATED WORKFLOW REPORT IN RPT

The purpose of this process is to obtain a report of initiated workflow requests. Worklfows in the Initial status indicate they have not been submitted and have not launched the workflow. In order to proceed, the requestor must login to update comments and SUBMIT the workflow.
This data is updated nightly, and updates or additions will reflect the following business day.

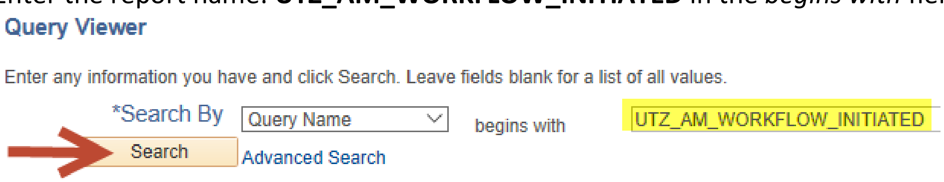
PeopleSoft Menu Icons:


Nav Bar

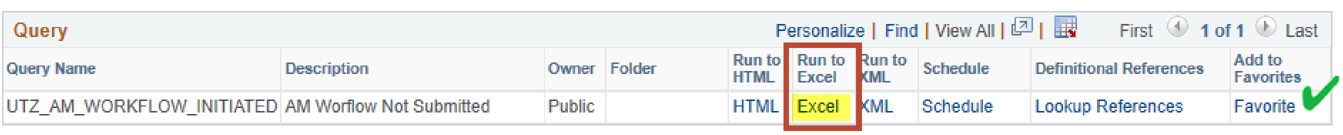


Navigator

1. Log into the RPT Environment. https://zbfi-rpt.utshare.utsystem.edu/psp/ZBFIRPT/?cmd=start
2. From the NavBar icon on the top right of the page, select the Navigator icon.
3. Select **Reporting Tools**
4. Select **Query**
5. Select **Query Viewer**
6. Enter the report name: **UTZ_AM_WORKFLOW_INITIATED** in the *begins with* field and click on **Search**.

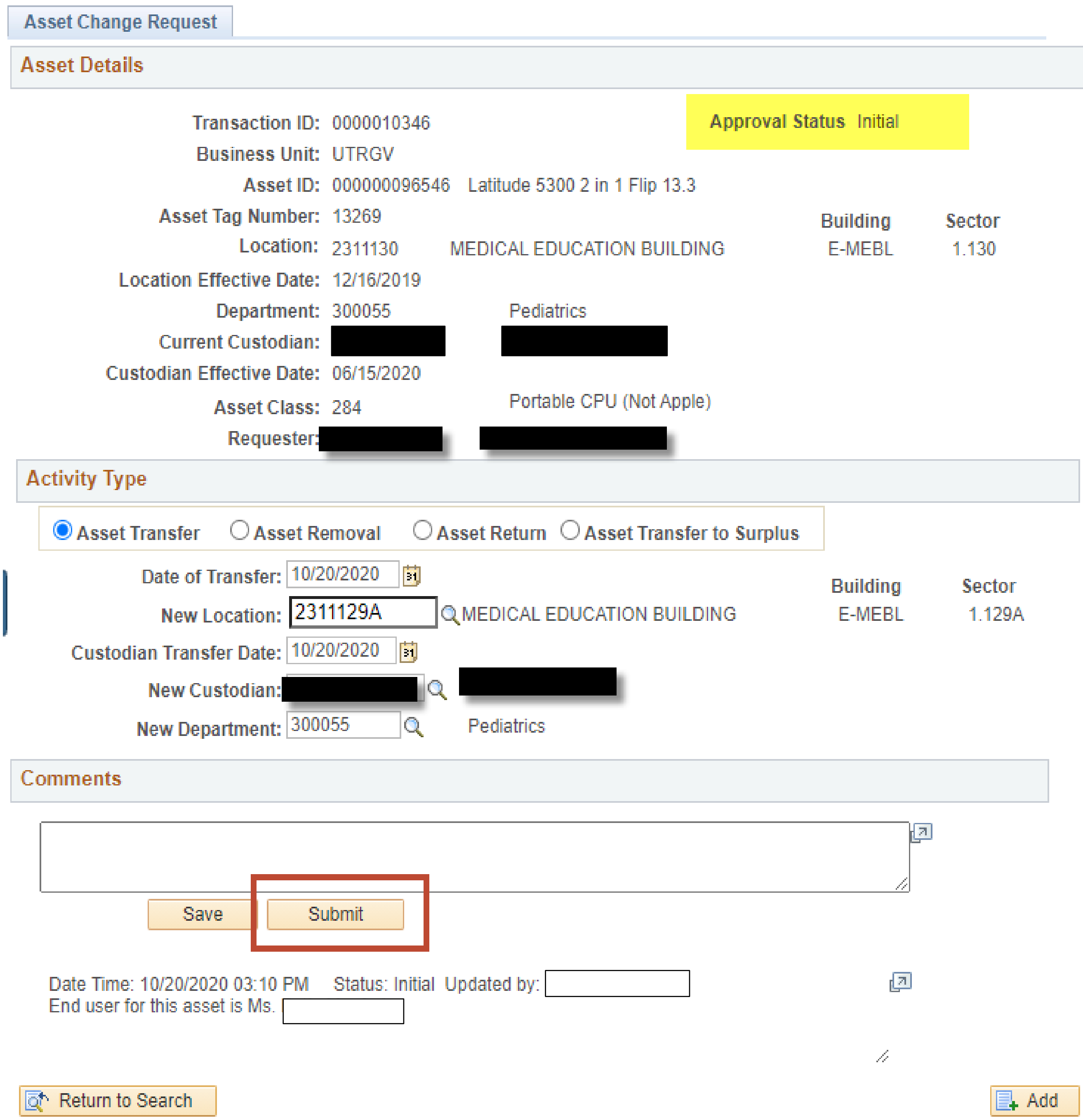


7. At this time, this report can be marked as **Favorite** for future quick access.
   Select the **Excel** option to run the report.



8. The Excel report contains the following fields:
   - Transaction ID
   - Business Unit
   - Status
   - Asset Request Code
   - Date/Time
   - Asset ID
   - Tag Number
   - Reqeustor Name
   - Current Cusotidan ID
   - Current Custodian Name

**Note: Assets tied to an Initial Status workflow are not available for other workflows.
Sample of a workflow in Initial Status on page 2.



Asset Change Request

Asset Details

Approval Status Initial

Transaction ID: 0000010346
Business Unit: UTRGV
Asset ID: 000000096546 Latitude 5300 2 in 1 Flip 13.3
Asset Tag Number: 13269
Location: 2311130 MEDICAL EDUCATION BUILDING — Building: E-MEBL — Sector: 1.130
Location Effective Date: 12/16/2019
Department: 300055 Pediatrics
Current Custodian: [redacted] [redacted]
Custodian Effective Date: 06/15/2020
Asset Class: 284 Portable CPU (Not Apple)
Requester: [redacted] [redacted]

Activity Type

(•) Asset Transfer ( ) Asset Removal ( ) Asset Return ( ) Asset Transfer to Surplus

Date of Transfer: 10/20/2020
New Location: 2311129A MEDICAL EDUCATION BUILDING — Building: E-MEBL — Sector: 1.129A
Custodian Transfer Date: 10/20/2020
New Custodian: [redacted] [redacted]
New Department: 300055 Pediatrics

Comments

Save | Submit

Date Time: 10/20/2020 03:10 PM Status: Initial Updated by:
End user for this asset is Ms.

Return to Search | Add