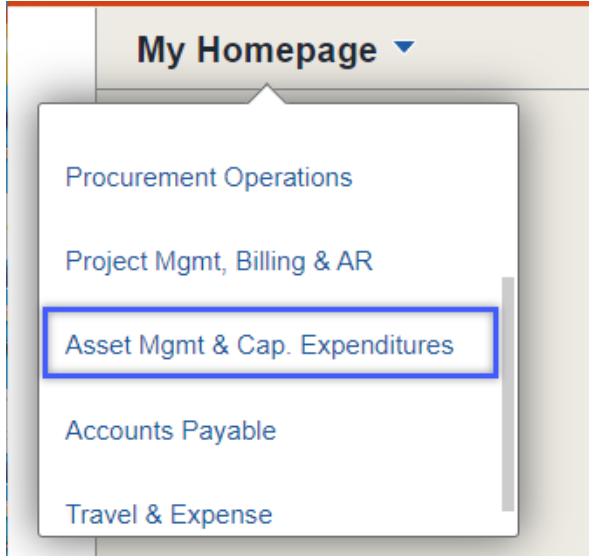


## HOW TO - INITIATE AN ASSET TRANSFER FOR CUSTODIAN/LOCATION WORKFLOW IN PEOPLESFT

The purpose of this process is to successfully initiate an **Asset Transfer** workflow in PeopleSoft. Asset Transfers can be submitted for custodian and/or location updates.

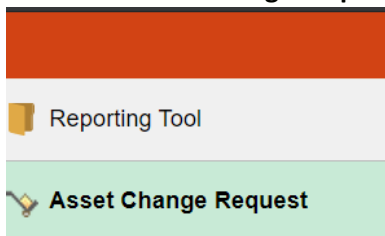
1. Log into PeopleSoft.
2. Select the **Asset Mgmt & Cap Expenditures Module**.



3. Select the **Asset UT Customizations** tile.



4. Select the **Asset Change Request** from the left menu bar.



## HOW TO - INITIATE AN ASSET TRANSFER FOR CUSTODIAN/LOCATION WORKFLOW IN PEOPLESOFT

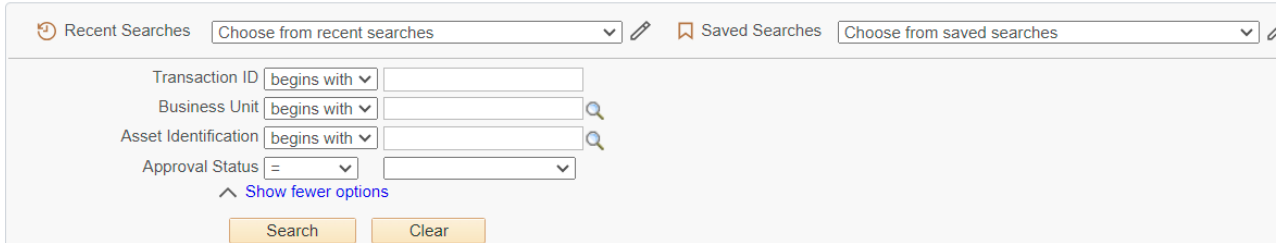
### 5. Select **Add a New Value**.

#### Asset Change Request

##### Find an Existing Value

##### ▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.



Recent Searches Choose from recent searches Saved Searches Choose from saved searches

Transaction ID begins with  
Business Unit begins with  
Asset Identification begins with  
Approval Status =

Show fewer options

Search Clear

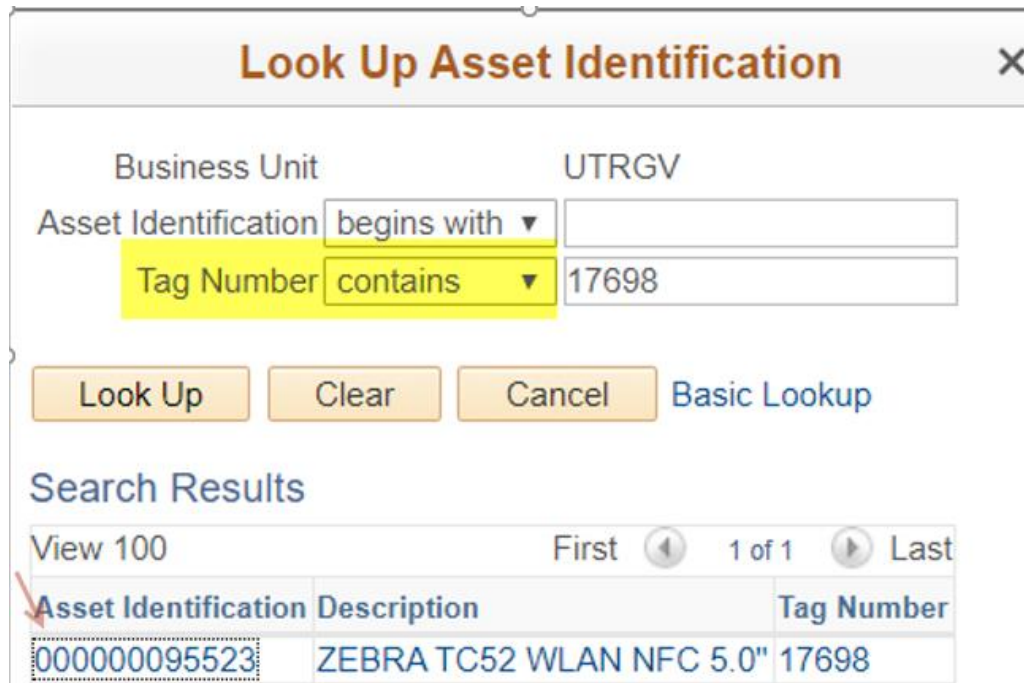
+ Add a New Value

### 6. Enter UTRGV on the **Business Unit Field**.

### 7. Enter the Asset Identification number, if available.

If the Asset ID number is NOT available:

- Select the Look up Asset icon (magnifying glass).
- Change the dropdown menu to Contains on the **Tag number** field.
- Enter the asset tag number.
- Select **Look Up**.
- Select the asset under Search Results.



### Look Up Asset Identification

Business Unit UTRGV

Asset Identification begins with

Tag Number contains 17698

Look Up Clear Cancel Basic Lookup

#### Search Results

View 100 First 1 of 1 Last

Asset Identification	Description	Tag Number
000000095523	ZEBRA TC52 WLAN NFC 5.0"	17698


- Select **Add** from the Asset Change Request page.

## Asset Change Request

Transaction ID

Business Unit

Asset Identification



- Select **Asset Transfer** under Activity Type.

**Activity Type**

Asset Transfer
  Asset Removal
  Asset Return
  Asset Transfer to Surplus

Date of Transfer:

New Location:

Custodian Transfer Date:

New Custodian:

New Department:

Building      Sector

- Enter today's date on the **Date of Transfer** field.

Select the **New Location** if required.

To locate the building and room number, click the magnifying glass to use the building descriptions fields.

Change Short Description to **contains** to narrow down your search.

**Look Up New Location**

SetID      UTRGV

Location Code

Description

Short Description

**Search Results**

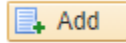
View 100      First  1-181 of 181  Last

Location Code	Description	Short Description	Sector	Jurisdiction	City
201021	ACADEMIC SUPPORT FACILITY	E-ASFC	.021	MAIN	Edinburg
201100	ACADEMIC SUPPORT FACILITY	E-ASFC	100	MAIN	Edinburg

*\*if this is the only update, go to step 15 to Submit.*

## HOW TO - INITIATE AN ASSET TRANSFER FOR CUSTODIAN/LOCATION WORKFLOW IN PEOPLESFT

11. Enter today's date on the Custodian Transfer Date field if a **PROPERTY OFFICER** update is required.
12. Enter the **Property Officers** employee ID or select the magnifying glass to look up by name.
13. Enter the **New Department** code or select the magnifying glass to look up by name.
14. Enter **Comments** with information approvers may find helpful.
15. Select **Submit** to create the workflow. Once submitted, the workflow will be assigned a transaction ID and the Approval Status will update in In Process.
16. To create another workflow, click on **Add** at the bottom right of the page.



Sample of a Completed Asset Transfer (next page):

## HOW TO - INITIATE AN ASSET TRANSFER FOR CUSTODIAN/LOCATION WORKFLOW IN PEOPLESFT

### Asset Change Request

#### Asset Details

Transaction ID: 0000011421 Approval Status In Process  
 Business Unit: UTRGV  
 Asset ID: 00000095523 ZEBRA TC52 WLAN NFC 5.0"  
 Asset Tag Number: 17698  
 Location: 2011223 ACADEMIC SUPPORT FACILITY Building E-ASFC Sector 1.223  
 Location Effective Date: 04/05/2019  
 Department: 202001 Financial Services-Comptroller  
 Current Custodian: EMPLOYEE ID EMPLOYEE NAME  
 Custodian Effective Date: 01/29/2021  
 Asset Class: 219 Palm Pilots  
 Requester: EMPLOYEE ID EMPLOYEE NAME

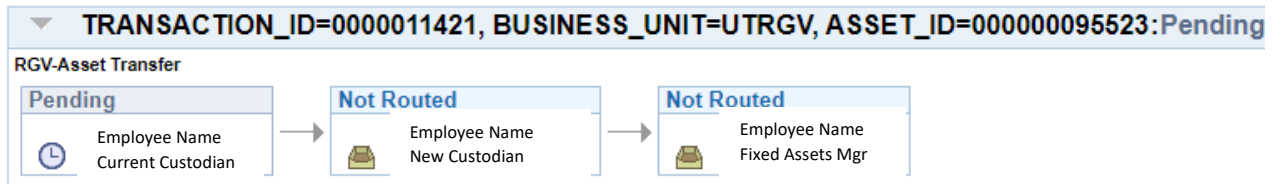
#### Activity Type

Asset Transfer
  Asset Removal
  Asset Return
  Asset Transfer to Surplus

Date of Transfer: 01/20/2021 Building Sector  
 New Location:  SCIENCE ENGR. & TECH. B-SETB 1.240  
 Custodian Transfer Date: 01/20/2021  
 New Custodian: EMPLOYEE ID EMPLOYEE NAME  
 New Department: 202001 Financial Services-Comptroller

#### Comments

### Asset Transfer Approval



Date Time: 03/02/2021 10:54 AM Status: Submitted Updated by: Linda Arellano Mares  
 updating location and custodian due to dept changes.

Add

- The current and new Property Officer (listed on the custodian fields) are required to Approve the workflow.
- Fixed Assets will approve, pending discrepancies such as employee status or non-active location code.
- The updates will not reflect on the asset record until the workflow is complete.