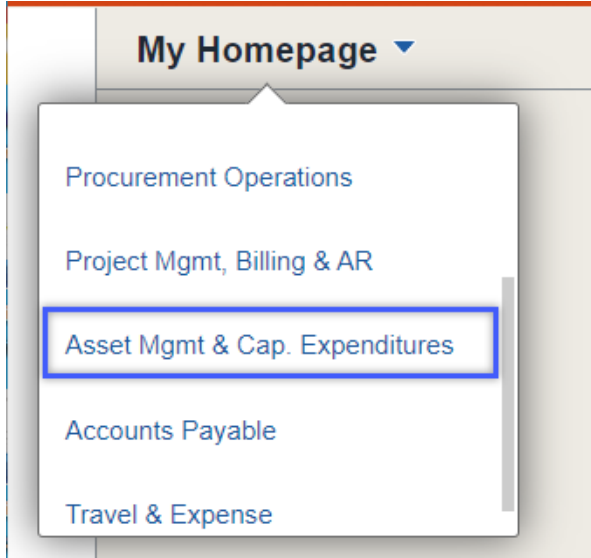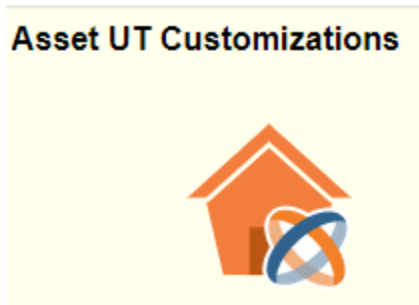## HOW TO - INITIATE AN ASSET RETURN WORKFLOW IN PEOPLESOFT

The purpose of this process is to successfully initiate an **Asset Return** workflow in PeopleSoft. Asset Returns can only be submitted when the asset location is marked Temporarily Off Campus.
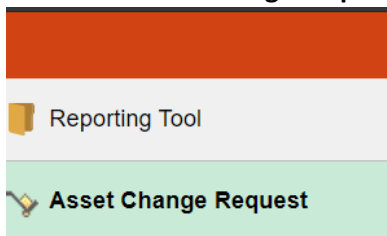
1. Log into PeopleSoft.
2. Select the **Asset Mgmt & Cap Expenditures Module.**

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

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

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

6.   Enter UTRGV on the **Business Unit Field.**
7.   Enter the Asset Identification number, then click **Add**, if available.
     If the Asset ID number is NOT available:
     a.   Select the Look up Asset icon (magnifying glass).
     b.   Change the dropdown menu to Contains on the **Tag number** field.
     c.   Enter the asset tag number.
     d.   Select **Look Up.**
     e.   Select the asset under Search Results.

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

Asset Change Request

| Find an Existing Value | Add a New Value |

Transaction ID NEXT
Business Unit UTRGV 🔍
Asset Identification 000000000553 × 🔍

Add ⬅

9. Select **Asset Return** under Activity Type.

Activity Type

○ Asset Transfer   ○ Asset Removal   ⦿ Asset Return   ○ Asset Transfer to Surplus

Date of Return: 01/18/2021 📅
New Location: | 🔍

10. Enter todays date on the **Date of Return** field.
11. Enter the campus location code of where the assets will be returned.
    To locate the building and room number, click the magnifying glass to use the building descriptions fields. Be sure to change the option to contains to narrow down your search.

Look Up New Location

SetID   UTRGV
Location Code [begins with ∨] [   ]
Description [contains ∨] [   ]
Short Description [contains ∨] [E-ASFC]

| Look Up | Clear | Cancel | Basic Lookup |

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

12. Enter comments in the **Comments field** if necessary.
13. Select **Submit** to create the workflow. Once submitted, the workflow will be assigned a transaction ID and the Approval Status will update to In Process.
14. To create another workflow, click on **Add** at the bottom right of the page.

📑 Add

Sample of a Completed Asset Return Transfer Workflow

Asset Change Request

Asset Details

Transaction ID: 0000009646	Approval Status In Process
Business Unit: UTRGV	
Asset ID: 000000000553 TABLET APPLE IPAD MINI WRetin	
Asset Tag Number: 747086770	Building Sector
Location: OFF CAMPUS TEMPORARILY OFF CAMPUS	TOC OFF CAMPUS
Location Effective Date: 01/01/2003	
Department: 410245 Teaching & Learning	
Current Custodian: Employee ID Employee Name	
Custodian Effective Date: 06/03/2020	
Asset Class: 219 Palm Pilots	
Requester: Employee ID Employee Name	

Activity Type

○ Asset Transfer   ○ Asset Removal   ◉ Asset Return   ○ Asset Transfer to Surplus

Date of Return: 01/18/2021	Building	Sector
New Location: 201109 ACADEMIC SUPPORT FACILITY	E-ASFC	109

Comments

Asset Transfer Approval

▼ TRANSACTION_ID=0000009646, BUSINESS_UNIT=UTRGV, ASSET_ID=000000000553:Pending

RGV-Asset Transfer

Pending	Not Routed
🕐 Employee Name Current Custodian →	📧 Employee Name Fixed Assets Mgr

Date Time: 02/09/2021 03:30 PM   Status: Initial Updated by: Linda Arellano Mares
comments_test

📥 Add

- The Property Officer for the asset is required to Approve the workflow.
- Once approved, Fixed Assets will review and approve.
- The location updates will not reflect on the asset record until the workflow is complete.

Asset Transfer Approval

▼ TRANSACTION_ID=0000005595, BUSINESS_UNIT=UTRGV, ASSET_ID=0000072847:Approved

RGV-Asset Transfer

Approved	Approved
✓ Custodian Name Time/Date →	✓ Employee Name Fixed Assets Mgr