

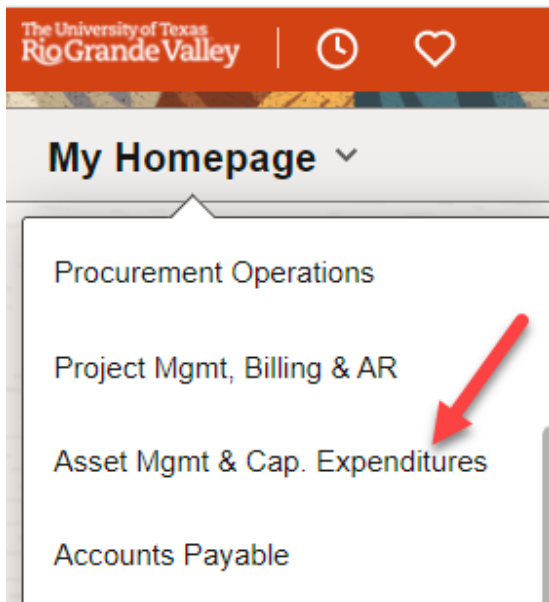
HOW TO - INITIATE A SURPLUS TRANSFER IN PEOPLESOFT

The purpose of this process is to successfully initiate a Surplus Transfer workflow in PeopleSoft. Once the approval process is complete, the asset record will update the custodian and location, and will no longer be listed on the inventory. **IF YOUR ASSET IS A COMPUTER, TABLET, LAPTOP OR IPAD; PLEASE CREATE A TICKET FOR HARD DRIVE REMOVAL FOR SURPLUS VIA THE IT SUPPORT CENTER.** When completed by the Information Technology department, a workflow can be initiated. All other assets can be initiated immediately.

IMPORTANT: If the asset record and physical location of the asset are not same, please contact Assets Management. We will update the location data on your behalf. Once updated, the workflow can be created. If the location information is incorrect the workflow will be cancelled.

Use the Comments field to insert a contact name and phone number.

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

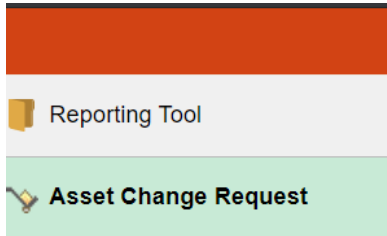


3. Select the **Asset UT Customizations** tile.



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



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

Find an Existing Value

Search Criteria

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

A screenshot of the 'Find an Existing Value' search interface. At the top right, there is a red arrow pointing to a button labeled '+ Add a New Value'. Below the search criteria section, there are two dropdown menus: 'Recent Searches' and 'Saved Searches', both with 'Choose from recent searches' and 'Choose from saved searches' respectively. The search criteria section includes fields for 'Transaction ID' (dropdown: 'begins with'), 'Business Unit' (dropdown: 'begins with'), 'Asset Identification' (dropdown: 'begins with'), and 'Approval Status' (dropdown: '='). There is a 'Show fewer options' link and 'Search' and 'Clear' buttons at the bottom.

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

Add a New Value

A screenshot of the 'Add a New Value' form. The 'Transaction ID' field contains 'NEXT'. The 'Business Unit' field contains 'UTRGV' and has a magnifying glass icon to its right, with a red arrow pointing to it. The '*Asset Identification' field is empty and has a magnifying glass icon to its right. An 'Add' button is located at the bottom left of the form.

7. Enter the Asset Identification number, 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.

Look Up Asset Identification

Business Unit

Asset Identification

Tag Number

Search Results

View 100 First ◀ 1 of 1 ▶ Last

Asset Identification	Description	Tag Number
0000115604	IPAD	15604

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

Asset Change Request

Transaction ID

Business Unit

Asset Identification

←

- 9. Select **Asset Transfer to Surplus** under Activity Type.

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Sanitization Date:

Sanitization Method:

Date of Surplus:

New Location:

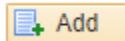
Building Sector

- 10. Enter the **Sanitization Date**: this is the date IT has completed the hardware removal. *(Non-computer assets will not require a sanitization date.)*
- 11. Enter the **Sanitization Method**: choose the method (degauss, destruct, overwrite) used to remove hardware. *(Non-computer assets will not require a Sanitization method)*
- 12. Enter **Date of Surplus**: this is the date the workflow is being created.
- 13. Select **New Location**: Chose the surplus in or closest to your campus. Choosing an invalid surplus location may cause the workflow to be cancelled and will have to be resubmitted.

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Location Code	Description	Short Description	Sector	Jurisdiction	City
100SURPLUS	ACADEMIC SUPPORT FACILITIES A	B-ASFA	SURPLUS OFF		Brownsville
276SURPLUS	COMMUNITY ENGAGEMENT & STUDENT E-CESS	E-CESS	SURPLUS OFF		Edinburg

14. In the **Comments** Field, provide a contact name and phone number. This is the information the General Services staff will use to schedule a pickup. If this information is not provided, the workflow will be cancelled.
15. 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.
16. To create another workflow, click on **Add** at the bottom right of the page.



Sample of a Completed Asset Transfer to Surplus for a Computer or like Asset

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Asset Change Request

Asset Details

Transaction ID: 0000011460	Approval Status: In Process
Business Unit: UTRGV	
Asset ID: 000000000199 TABLET DELL VENUE 11 PRO	
Asset Tag Number: 747086062	
Location: 1131428 MAIN	Building: B-MAIN Sector: 1.428
Location Effective Date: 06/10/2020	
Department: 410653	Anthropology
Current Custodian: Employee ID	Employee name
Custodian Effective Date: 06/10/2020	
Asset Class: 219	Palm Pilots
Requester: Employee ID	Employee name

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Sanitization Date: 03/15/2021

Sanitization Method: Degauss

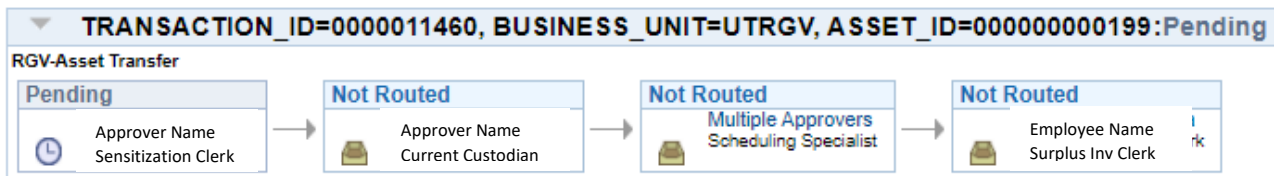
Date of Surplus: 03/22/2021

New Location: ACADEMIC SUPPORT FACILITIES A

Building: B-ASFA
Sector: SURPLUS

Comments

Asset Transfer Approval



Date Time: 03/25/2021 03:53 PM Status: Submitted Updated by: Linda Arellano Mares
 Please contact Jane Doe or John Garza at ext. 1234 to schedule a pick up.

- The Information Technology department will approve once the sanitization process is complete.
- The Property Officer (listed as the Current Custodian) will approve the surplus request.
- Central Scheduling (Scheduling Specialist) will create a work order on your behalf and include the work order number in the comments field. This approval does not indicate the asset has been picked up, only that the work order is in progress.
- Central Receiving (Surplus Inventory Clerk) will receive surplus inventory and approve the workflow.
- The updates will reflect the surplus location on the asset record when the workflow is completed.

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Sample of a Completed Asset Transfer to Surplus for a Non-Computer. These workflows will not require Sanitization dates or methods.

Asset Change Request

Asset Details

Transaction ID: 0000011461		Approval Status: In Process	
Business Unit: UTRGV			
Asset ID: 000000000182 702 - Sound Devices Portable D			
Asset Tag Number: 747086201		Building	Sector
Location: 1112910	LIFE & HEALTH SCIENCES	B-LHSB	2.910
Location Effective Date: 01/01/2003			
Department: 410710	Biology		
Current Custodian: Employee ID	Employee name		
Custodian Effective Date: 01/01/2001			
Asset Class: 129	Stereo Systems		
Requester: Employee ID	Employee name		

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

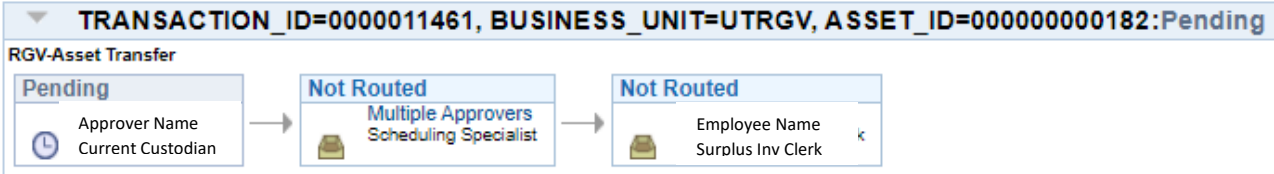
Sanitization Date:

Sanitization Method:

Date of Surplus: 03/22/2021		Building	Sector
New Location: 100SURPLUS	ACADEMIC SUPPORT FACILITIES A	B-ASFA	SURPLUS

Comments

Asset Transfer Approval



Date Time: 03/25/2021 03:55 PM Status: Submitted Updated by: Linda Arellano Mares
Please call John Garza at ext. 5678 to schedule a pick up

- The Property Officer (current custodian) for the asset is required to approve the surplus request.
- Central Scheduling (Scheduling Specialist) will create a work order on your behalf and include the work order number in the comments field. This approval does not indicate the asset has been picked up, only that the work order is in progress.
- Central Receiving (Surplus Inventory Clerk) will receive surplus inventory and approve the workflow.
- The updates will not reflect on the asset record until the workflow is complete.