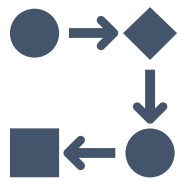




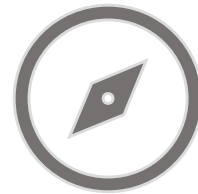
# ASSET WORKFLOW



# Agenda



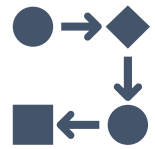
Asset Workflow  
Overview



Navigation

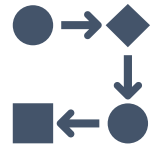


What's next?



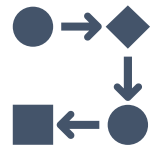
# Goal of Asset Workflow

- Safeguard, identify, and track University assets in PeopleSoft, moving in and out of campus
- Electronic PeopleSoft forms will now replace the Property Transfer Forms
- Electronic PeopleSoft forms will automatically route for approval
- Asset transfers can be initiated regardless of where the asset is located
- Designating custodians is essential for identifying asset ownership



# Electronic Forms

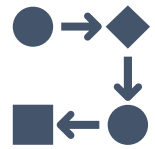
- Asset Transfer
- Asset Removal
- Asset Return
- Asset Transfer to Surplus



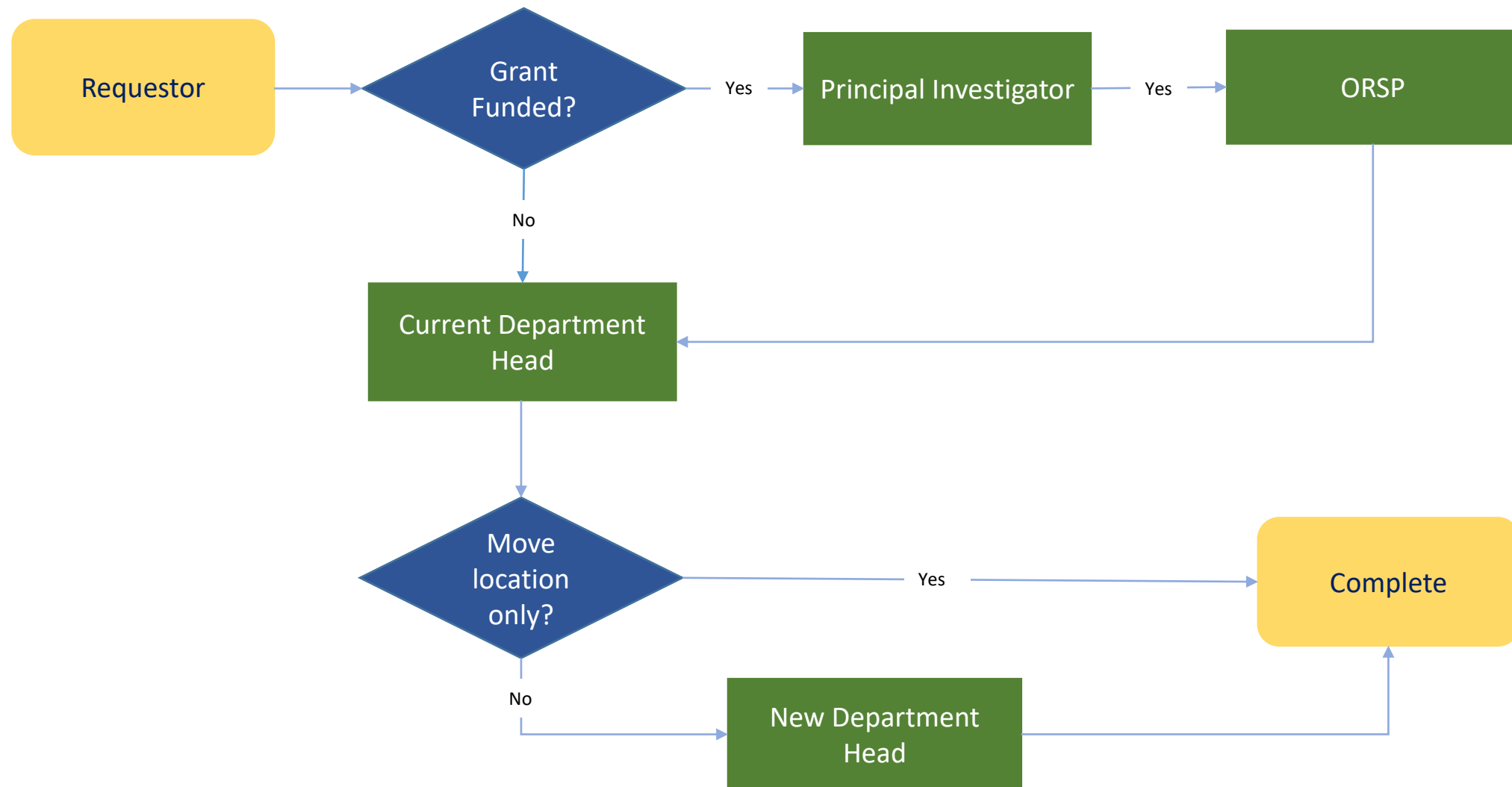
# Asset Transfer

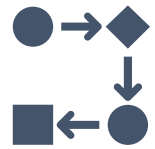
## When to use?

- Use when moving assets within campus
- Transfer equipment from one department to another
- Move equipment from one location to another
- Move equipment from one custodian to another



# Workflow - Asset Transfer

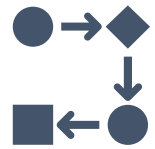




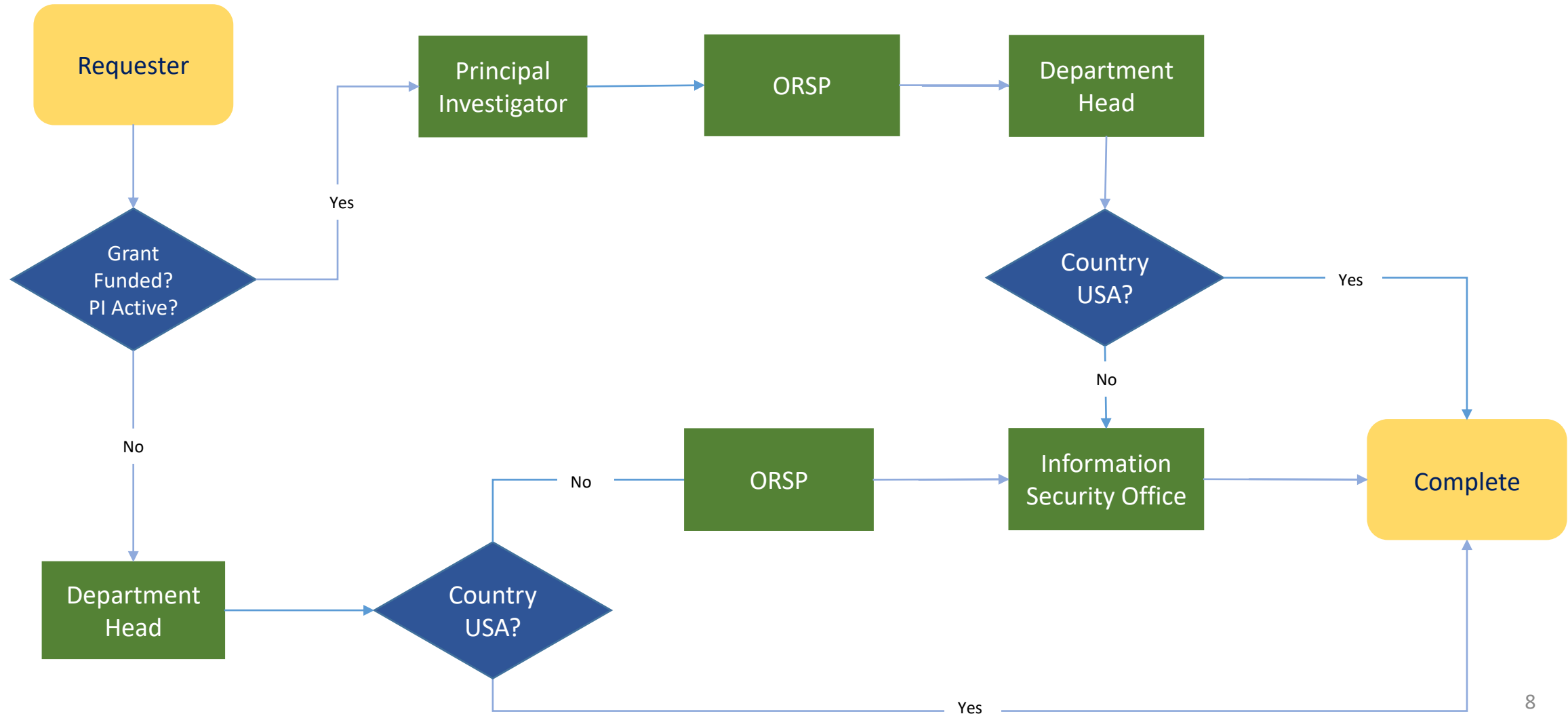
# Asset Removal

## When to use?

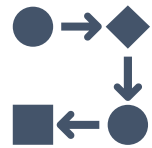
- Use when moving assets to off-campus locations
- Remove equipment from campus to location within the U.S.
- Remove equipment from campus to foreign country



# Workflow – Asset Removal



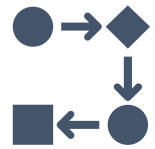




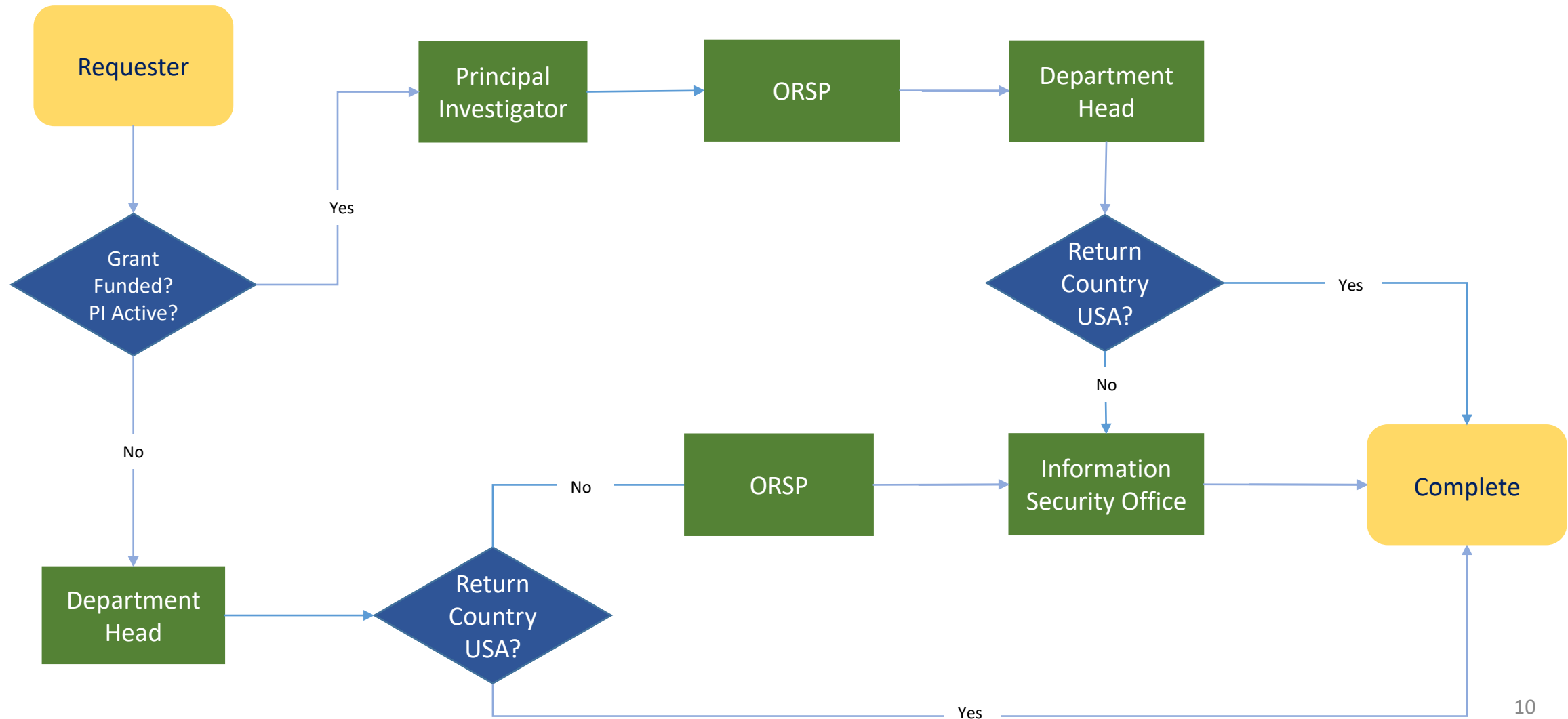
# Asset Return

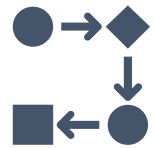
## When to use?

- Use when returning assets to campus
- Returning equipment to campus after it was removed from campus and taken to a U.S. location or foreign country.



# Workflow – Asset Return





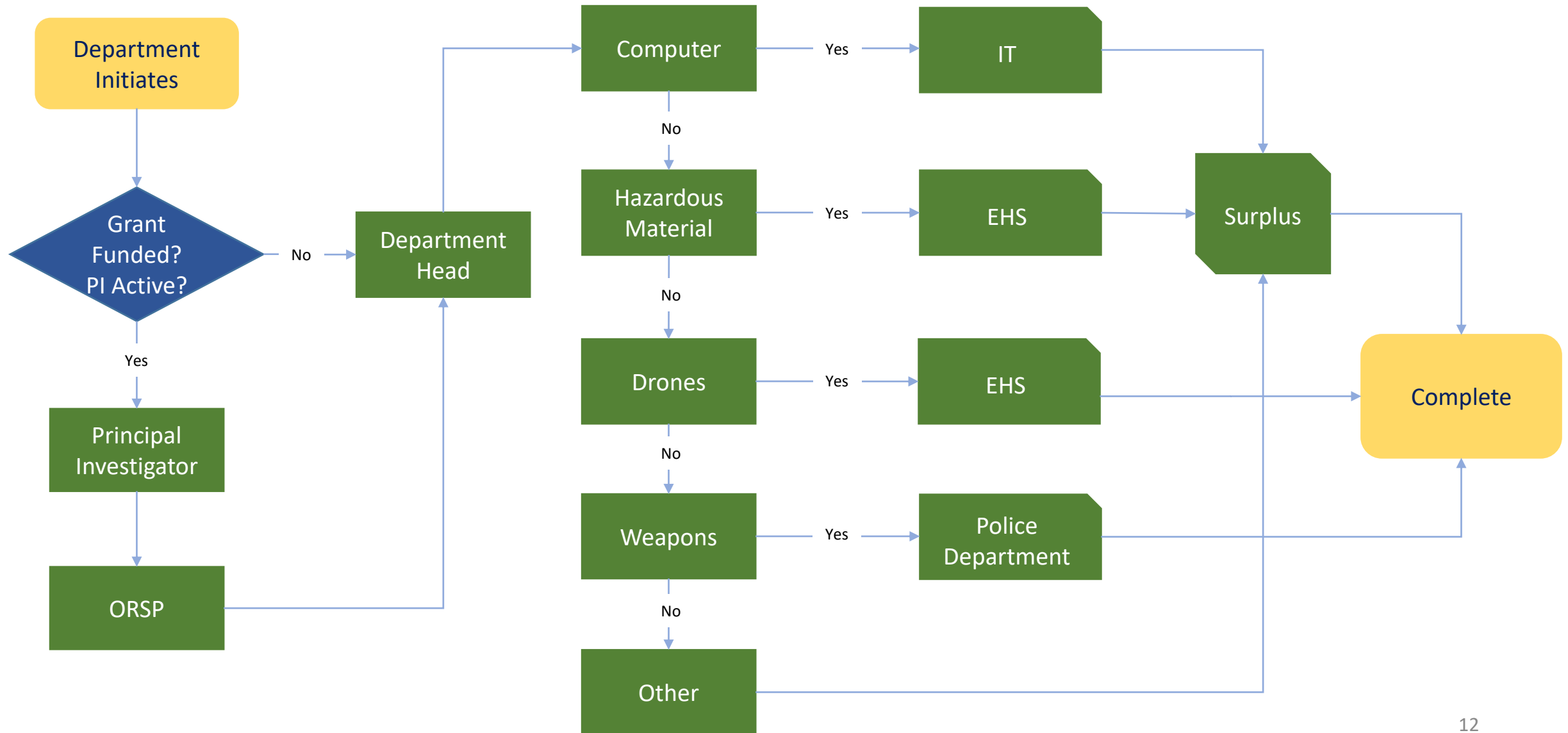
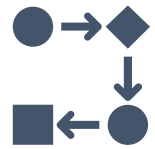
# Asset Transfer to Surplus

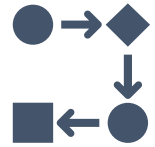
## When to use?

- Use to move equipment to Surplus Departments when asset is no longer used or retired

Asset Type		Surplus Department
Computers/Other	➔	Physical Plant F100 (Surplus)
Weapons	➔	Command Center 101 (Police)
Hazardous/Drones	➔	Hertzog 170 (EHS)

# Workflow – Asset Transfer to Surplus





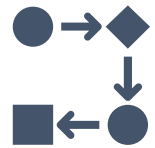
# Access & Training Resources

- Access to the Asset Workflow role can be granted to staff and students
- Request Asset Workflow role via [Front Office Access Request Form](#)
- Training materials can be accessed via the [Asset Workflow](#) page

The screenshot displays the Peoplesoft Business Affairs website. The header includes the UTEP logo and the text 'PEOPLESOFT Business Affairs'. A navigation menu contains links for ABOUT, NEWS, TRAINING, RESOURCES, FORMS, PAYROLL CALENDAR, FAQs, and CONTACT. The main content area is titled 'Asset Workflow' and 'Training Materials'. Under 'Presentations', there is a link for 'Asset Workflow'. Under 'Quick Guides', there are links for 'Asset Workflow - Approver', 'Asset Workflow - Asset Removal', 'Asset Workflow - Asset Return', 'Asset Workflow - Asset Transfer', 'Asset Workflow - Search for Asset or Transaction', and 'Asset Workflow - Transfer to Surplus'. Under 'Video Tutorials', there are links for 'Asset Removal', 'Asset Return', 'Asset Transfer', 'Asset Transfer to Surplus', and 'Search for Asset or Transaction'. Under 'FAQs', there is a link for 'Coming Soon!'. A sidebar on the left contains buttons for 'LAUNCH PEOPLESOFT', 'TRAINING RESOURCES', 'TRAINING CALENDAR', 'AVAILABLE QUERIES AND REPORTS', and 'BROWSER SUPPORT'. Below these buttons is a 'CONNECT WITH US' section with contact information for The University of Texas at El Paso, including the address, phone number, and email, along with social media icons for Facebook, Twitter, YouTube, and Instagram.



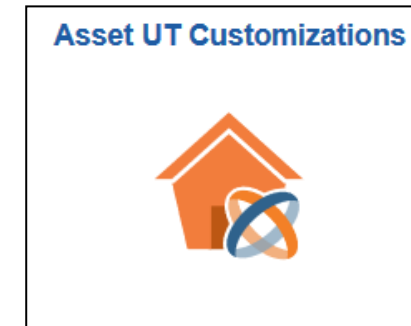
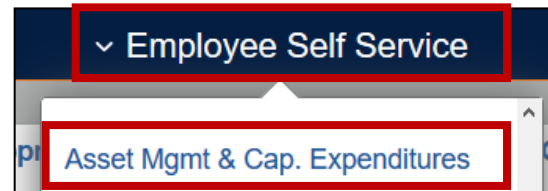
# Demo



# Searching for Assets or Transactions

When reviewing asset transactions follow the steps below:

1. From the **Employee Self Service** drop down menu, select **Asset Mgmt & Cap Expenditures**.
2. Select the **Asset UT Customizations** tile.
3. Business Unit = **UTEP1**. Define your search by entering **Transaction ID**, **Asset Identification OR Tag Number**.
4. Select **Search**.



Find an Existing Value + Add a New Value

▼ Search Criteria

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

Recent Searches

Transaction ID

Business Unit

Asset Identification

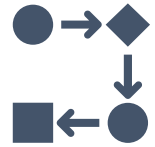
Tag Number

Approval Status

Department

Activity Type

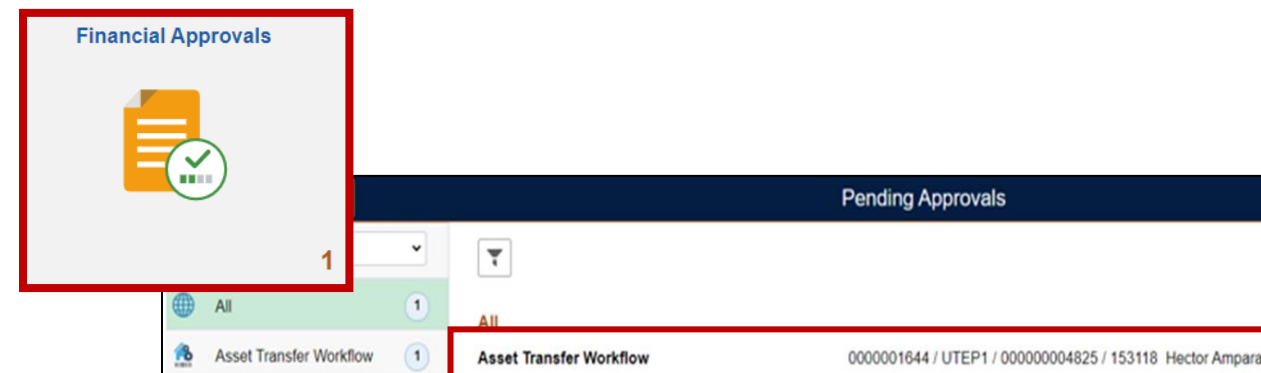
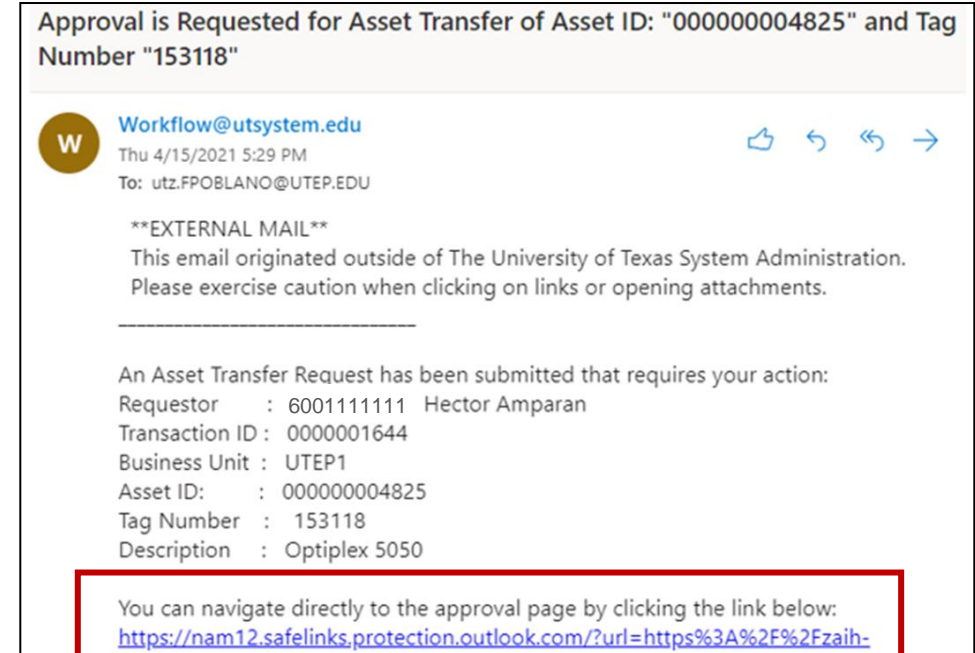
[^ Show fewer options](#)



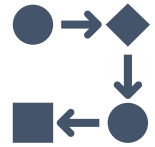
# Approving

## Things to Know:

- There are two approval methods when reviewing asset transactions:
- **“E-mail” Method\*:**
  - Document is sent to UTEP email address.
  - Click hyperlink at bottom of e-mail.
  - Log into PeopleSoft, under Pending Approvals select the request to review/approve.
- **Financials Tile:**
  - Log into PeopleSoft, from the **Employee Self Service** home page select the **Financial Approvals Tile**.
  - Under Pending Approvals, select the request to review/approve.







# Approving

## Things to Know:

When reviewing asset transactions follow the steps below:

1. Review the **Asset Details** for the transaction.
2. Add a **comment**, if needed.
3. Click **Approve** to approve the transaction or **Deny** to cancel the transaction, comments are required if the transaction is denied.

### Asset Details

Transaction ID: 0000001644	Approval Status: In Process	
Business Unit: UTEP1	Principle Investigator:	
Asset ID: 000000004825 Optiplex 5050	Asset Tag Number: 153118	
Financing Code	Building Office	Sector 200
Location: UNT 2.13 UnivTowers 200	Project ID:	
Location Eff Date: 02/27/2018	Profile ID: 204CTL41	
Department: 506000 Technology Support	Serial ID: JW79CM2	
Current Custodian:	Acquisition Date: 02/27/2018	
Cust Eff Date: 08/12/2019	Fund: 3200 DES Net Service Departments	
Asset Class: 204 Desktop CPU	Cost Center: 18261045 UNIVERSITY PC REPLACEMENT	
Requester: 6001142777 Hector Amparan	Function: 700 Institutional Support	
Amount: 807.250		

### Activity Type

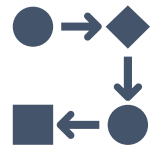
Asset Transfer  Asset Removal  Asset Return  Asset Transfer to Surplus

Date of Transfer: 04/15/2021	Building Office	Sector 200
New Location: UNT 2.13 UnivTowers 200		
Custodian Transfer Date: 04/15/2021		
New Custodian: 6001142777 Amparan,Hector		
New Department: 506000 Technology Support		

### Comments

Approved

Approve Deny



# Queries

- Use query(s) below to find a listing of assets:



Nav Bar> (Tile)Navigator> (Link) Financials> Reporting Tools> Query> Query Viewer

Query Name	Query Description
UTE_AM_ASSET_LISTING	Asset listing for UTEP

UTE\_AM\_ASSET\_LISTING - Asset Listing for UTEP

Unit

Dept

Custodian



# What's Next?

- Review the assets in your department
- Determine if your department will designate a custodian (responsible of the assets)
- If designating a custodian, complete Asset Transfer Form
- If needed, transfer assets to corresponding department/location
- For questions or further assistance please contact [helpdesk@utep.edu](mailto:helpdesk@utep.edu)

# Questions?





**THANK YOU!**