

Asset Workflow- Transfer to Surplus

Follow the steps to transfer an asset to Surplus Department when asset is no longer used or retired.

The screenshot shows the 'Employee Self Service' dropdown menu with 'Asset Mgmt & Cap. Expenditures' selected (Step 1). Below it is the 'Asset UT Customizations' tile (Step 2). The 'Add a New Value' button is highlighted (Step 3). The form fields are filled with: Transaction ID: NEXT, Business Unit: UTEP1, Asset Identification: 000000004825, and Tag Number: 153118 (Step 4). The 'Add' button is highlighted (Step 5).

Assets transferred to Surplus will be reviewed by the following departments:

- Computer → IT
- Hazardous Material → EHS
- Drones → EHS
- Weapons → Police
- Other → Surplus

1. From the Employee Self-Service dropdown menu, select **Asset Mgmt & Cap Expenditures**.
2. Select the **Asset UT Customizations** tile.
3. Click on **Add a New Value**.
4. Enter the following information:
Transaction ID = NEXT
Business Unit = UTEP1
Enter either Asset ID#* or Tag #*
5. Click **Add**.
6. Asset Details: Type of Asset, Current Location, Purchase Price & Funding Source will populate.

* Use magnifying glass if needed for more search options.

Asset Details

Transaction ID: NEXT	Approval Status: Initial
Business Unit: UTEP1	Principle Investigator:
Asset ID: 000000001830 COMPUTER DELL OPTIPLEX 7020	Asset Tag Number: 151637
Financing Code	Building Sector
Location: UNT 2.13 UnivTowers 200	Office 200
Location Eff Date: 09/09/2016	Project ID:
Department: 506000 Technology Support	Profile ID: 204CTL41
Current Custodian:	Serial ID: 67SF182
Cust Eff Date: 12/04/2015	Acquisition Date: 12/04/2015
Asset Class: 204 Desktop CPU	Fund: 3200 DES Net Service Departments
Requester:	Cost Center: 18261045 UNIVERSITY PC REPLACEMENT
Amount: 812.600	Function: 700 Institutional Support

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Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Sanitization Date:

Sanitization Method:

Date of Surplus: 03/31/2021

New Location: PPB 1.90

Custodian Transfer Date: 03/31/2021

New Custodian:

Surplus Department ID

Comments

Desktop no longer in use. Retiring to surplus.

Save Submit

7. To transfer asset, click on **Asset Transfer to Surplus**.
8. Enter the following:
 - Date of Surplus**
 - New Location*** (Command Center 101 for weapons; Hertzog 170 for hazardous material/drones; Physical Plant F100 for computers and other).
 - Custodian Transfer Date**
 - Asset Condition** (dropdown) field is optional.
 - Hazardous Asset** (click if hazardous).
9. Enter comments (provide detailed information of asset).
10. Select **Save**, then **Submit**.

* Use magnifying glass if needed for more search options.

Asset Details

Transaction ID: 0000000374

Business Unit: UTEP1

Asset ID: 000000001830 COMPUTER DELL OPTIPLEX 7020

Financing Code

Location: UNT 2.13 UnivTowers 200

Location Eff Date: 09/09/2016

Department: 506000 Technology Support

Current Custodian:

Cust Eff Date: 12/04/2015

Asset Class: 204 Desktop CPU

Requester: 6001111111 Hector Amparan

Amount: 812.600

Approval Status: In Process

Principle Investigator:

Asset Tag Number: 151637

Building Sector

Office

Project ID:

Profile ID: 204CTL41

Serial ID: 67SF182

Acquisition Date: 12/04/2015

Fund: 3200 DES Net Serv

Cost Center: 18261045 UNIVERSITY PC REPLACEMENT

Function: 700 Institutional Support

11. **Transaction ID** appears.
12. **Approval Status** appears.
13. **Requester Name** appears.
14. **Workflow** appears.

