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

1. **Requestor**
2. **Grant Funded?**
   - Yes: **Principal Investigator**
   - No: **Current Department Head**
3. **Move location only?**
   - Yes: **Complete**
   - No: **New Department Head**
4. **ORSP**
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

Requester

- Grant Funded? PI Active?
  - Yes → Principal Investigator
  - No → Department Head

Principal Investigator

- ORSP

ORSP

- Department Head

Department Head

- Country USA?
  - Yes → Complete
  - No → ORSP

Country USA?

- ORSP

ORSP

- Information Security Office

Information Security Office

- Complete
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.
Asset Transfer to Surplus

**When to use?**

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

<table>
<thead>
<tr>
<th>Asset Type</th>
<th>Surplus Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computers/Other</td>
<td>Physical Plant F100 (Surplus)</td>
</tr>
<tr>
<td>Weapons</td>
<td>Command Center 101 (Police)</td>
</tr>
<tr>
<td>Hazardous/Drones</td>
<td>Hertzog 170 (EHS)</td>
</tr>
</tbody>
</table>
Workflow – Asset Transfer to Surplus

1. Department Initiates
   - Grant Funded? PI Active?
     - No: Department Head
     - Yes: Principal Investigator
       - No: ORSP
       - Yes: Complete
2. Department Head
   - Hazardous Material
     - No: Computer
     - Yes: EHS
   - Drones
     - No: IT
     - Yes: EHS
3. Weapons
   - No: Surplus
   - Yes: Police Department
4. Other
   - Yes: Complete

EHS: Environmental Health and Safety
IT: Information Technology
Police Department
ORSP: Office of Research Services
Complete
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
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. Select Find an Existing Value.
4. Define your search by entering the Transaction ID, Asset Identification or Tag Number.
5. Enter UTEP1 on Business Unit, this field is required.
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.
Queries

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

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

<table>
<thead>
<tr>
<th>Query Name</th>
<th>Query Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>UTE_AM_ASSET_LISTING</td>
<td>Asset listing for UTEP</td>
</tr>
</tbody>
</table>
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
Questions?
THANK YOU!