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. Current Department Head
   - Move location only?
     - Yes: Complete
     - No: New Department Head
4. No: 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
  - Country USA?
    - Yes
      - ORSP
    - No
      - ORSP

- ORSP
  - Country USA?
    - Yes
      - Complete
    - No
      - Information Security Office

- Department Head
  - Country USA?
    - Yes
      - Complete
    - No
      - ORSP
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

- Requester
  - Principal Investigator
    - ORSP
      - Department Head
        - Return Country USA?
          - Yes
          - No
            - ORSP
              - Information Security Office
                - Complete
              - Return Country USA?
                - Yes
                - No
                  - ORSP
                    - Return Country USA?
                      - Yes
                      - No
                        - Department Head
                          - Grant Funded? PI Active?
                            - Yes
                            - No
                              - Requester

- Department Head
  - Grant Funded? PI Active?
    - Yes
    - No
      - Requester
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>
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. Business Unit = UTEP1. Define your search by entering Transaction ID, Asset Identification OR Tag Number.
4. Select Search.
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>

UTE_AM_ASSET_LISTING - Asset Listing for UTEP

- Unit: UTEP1
- Dept: 111111
- Custodian: %

View Results
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?