



Office of Information
Technology
KNOWLEDGE SERVICES

Asset Management Asset Changes and Workflow

Table of Contents

Overview.....	1
Terminology	1
UTShare Roles	2
Distribution Services	2
Inventory Contact.....	3
Inventory Services	3
Department Head.....	3
Custodian.....	3
Asset Changes	4
Navigation.....	4
Asset Transfer	5
Steps to Submit Asset Transfer	5
Asset Removal.....	8
Steps to Submit Asset Removal.....	9
Asset Return.....	12
Steps to Submit Asset Return.....	12
Asset Transfer to Surplus.....	16
Steps to Submit Transfer to Surplus.....	16
Approvals.....	19
Navigation	19
Reviewing Asset Transfer	21

Overview

Assets are managed in UTShare which streamlines the process through to approval.

Terminology

Activity Type – These are the UTShare asset “change” options available to choose.

- Asset Transfer – Change department, custodian, or location.
- Asset Removal – Used to obtain approvals to remove assets from campus temporarily.
- Asset Return – Permanently return items to campus.
- Asset Transfer to Surplus – Transfer items to surplus.

Custodian - The individual primarily responsible for possession, use, and oversight of a specific item of University property to maintain the asset in good working condition and prevent damage, loss, theft, or other harm to the asset.

Controlled Asset: An asset that does not meet the capitalization value threshold, but still must be secured, tracked, and accounted for in the annual inventory due to the nature of the item. Computing devices and firearms are classified as controlled assets if their value is \$0.00 to \$4999.99.

These classes of assets are classified as controlled if their value is \$500.00- \$4,999.99.

Class Code	Property Item
129	Sound Systems and Other Audio Equipment
130	Camera- Portable – Digital, SLR
131	TVs, Video Players/Recorders
218	Data Projectors
735	Unmanned Aerial Vehicles (UAV) Drones

Inventory Services enters the device information necessary to add the asset into UTShare for controlled assets.

Capital Asset – Real or personal property that has an estimated life of greater than one year and a value equal to or greater than the capitalization threshold established for that asset type. The threshold values for capitalized assets include the following:

Description	Threshold Amt.
Tangible Assets	
Furniture and equipment	\$5,000
Vehicles, boats and aircraft	\$5,000
Other capital assets	
◦ Books - Historical, Manuscripts & Rare Publications	◦ \$0
◦ Works of art and historical treasures	◦ \$0
Intangible Assets	
Computer software	\$100,000
Internally developed computer software	\$1,000,000
Other intangible capital assets	\$100,000

Accounting Services will enter the device information necessary to add the capital asset into UT Share.

Surplus Property – Property that exceeds the University’s needs and is not required for the University’s foreseeable needs. The term includes used or new property that retains some usefulness for the purpose for which it was intended or for another purpose.

UTShare Roles

Distribution Services

- Receives and distributes property within the University.
- Assists with the move and shipping of large assets as requested.
- Collaborates with Inventory Services and provides information necessary to ensure UT Share is accurate and up to date at all times.
- Oversees and maintains the storage, evaluation, and handling of all surplus property.
- Ensures surplus property is available for inspection and reclamation by University staff.
- Assigns inventory tag numbers for assets and provides inventory tags to the departments as needed.

Inventory Contact

- Serves as the principal department contact regarding all property possessed and controlled by that department.
- Serves as the department's primary liaison to Inventory Services and Distribution Services.
- Ensures the inventory asset tag is in place and accessible.
- Has access and knowledge of all assets in their area.
- Maintains all department asset information in UTShare.

Inventory Services

- Serves as a resource for University staff who are responsible for ensuring all departmental assets are properly tagged.
- Approves Asset Transfer and Asset Transfer to Surplus asset changes made in UTShare.
- Provides other assistance and collaborates with University personnel as needed.
- Provides replacement inventory tags to the departments as needed.

Department Head

- Responsible for the care and safeguarding of all University property assigned to, possessed or in use by their respective departments.
- Responsible for ensuring inventory contacts and all department staff abide by the requirements of these procedures.
- Makes recommendations for the acquisition of University property.
- Approves UTShare Asset Changes.
- Approves gifts-in-kind and/or donations to his or her department.

Note: A list of University departments is maintained by Inventory Services and can be obtained by email request to Inventory Services at inventory@uta.edu.

Custodian

- Maintains possession of and control over department property assigned to their custody.
- Responsible for knowing the location of the property assigned to them.
- Provides asset change information promptly to the department's inventory contact.

Asset Changes

Four types of asset changes will be managed in UTShare.

1. Asset Transfer

- They are used to transfer an asset to another department within the University. Changes to locations and custodians are included in the Asset Transfer activity.

2. Asset Removal

- Used to obtain approval to remove assets from campus temporarily

3. Asset Return

- They are used to acknowledge receipt of an Offsite asset that has been returned to campus.

4. Asset Transfer to Surplus

- Transfer items to Surplus Property.

Navigation

Navigate to the Asset Change Request page: **NavBar > Financials > UTZ Customizations > Asset Management > Asset Change Request**. The Asset Change Request landing page displays:

1. Each Asset Change starts by clicking the **Add a New Value** button.

The screenshot shows the 'Asset Change Request' page. At the top right, there is a button labeled '+ Add a New Value' which is highlighted with a red box. Below this is a section titled 'Find an Existing Value' with a 'Search Criteria' dropdown. A note says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two search filters: 'Recent Searches' and 'Saved Searches', both with dropdown menus and edit icons. Below these are several search criteria fields: 'Transaction ID' (begins with), 'Business Unit' (begins with), 'Asset Identification' (begins with), 'Tag Number' (begins with), 'Approval Status' (=), 'Department' (begins with), and 'Activity Type' (=). Each field has a search icon. At the bottom, there is a 'Show fewer options' link and 'Search' and 'Clear' buttons.

Asset Transfer

The Asset details page has three panels:

- The **Asset Details panel** has the selected asset’s current information including the asset classification, location, and custodian.
- The **Activity Type panel** determines the asset transaction. The information requested will change depending on the activity choice.
- The **Comments panel** is used to enter any necessary details about the asset change and is optional for Asset Transfer.

Steps to Submit Asset Transfer

1. To create a new Asset Transfer, navigate to the Asset Change Request page: **NavBar > Financials > UTZ Customizations > Asset Management > Asset Change Request**. The Asset Change Request landing page
2. Click the **Add a New Value** button.

Asset Change Request

Find an Existing Value

Search Criteria

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

+ Add a New Value

Recent Searches Choose from recent searches ✎

Saved Searches Choose from saved searches ✎

Transaction ID begins with

Business Unit begins with 🔍

Asset Identification begins with 🔍

Tag Number begins with 🔍

Approval Status =

Department begins with 🔍

Activity Type =

^ Show fewer options

Search
Clear

3. Enter Business Unit **UTARL**
4. Enter the Asset Tag Number
5. Click **Add**

Note: The asset ID and the tag number are related. Populating the asset tag will auto-populate the Asset Identification.

Asset Change Request

Add a New Value
Find an Existing Value

Transaction ID

Business Unit

*Asset Identification

Tag Number

Add

6. Click the radio button beside **Asset Transfer**. This enables you to change the location and/or the custodian for the asset.

Note: The asset must be in an On-Campus location to submit this workflow.

Asset Change Request

Asset Change Request

Asset Details

Transaction ID: NEXT		Approval Status: Initial	
Business Unit: UTARL		Principle Investigator:	
Asset ID: 100000018837 LAPTOP MS SURFACE BOOK 3		Asset Tag Number: 130938	
Financing Code		Building	Sector
Location: 642-203 University Administration Bldg		642_203	203
Location Eff Date: 03/21/2022	Department: 340301 OIT Learning and Comms	Project ID:	Start Date End Date
Current Custodian: 1000345891 Sam, Maverick	Cust Eff Date: 06/26/2023	Profile ID: 284CTL41	
Asset Class: 284 Portable CPU (Not Apple)	Requester:	Serial ID: 024969501157	
Asset Title:	Acquisition Date: 08/22/2020	Acquisition Code	Purchased

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Date of Transfer: BT
Building
Sector

New Location: Q

Custodian Transfer Date: BT

New Custodian: Q

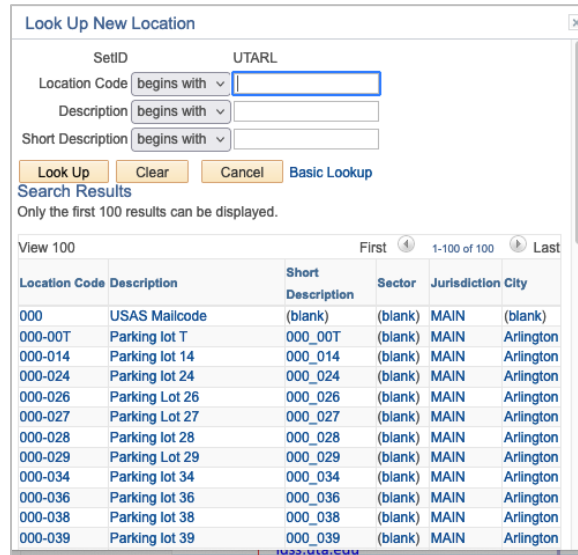
New Department: Q

Comments

Save
Submit

7. Enter the **Date of Transfer** (Use today's date).

8. Enter or search  for the **New Location** code.

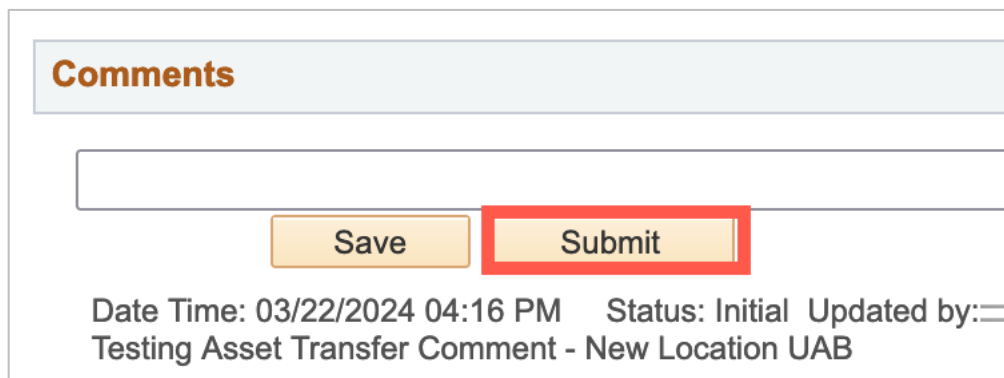


Location Code	Description	Short Description	Sector	Jurisdiction	City
000	USAS Mailcode	(blank)	(blank)	MAIN	(blank)
000-00T	Parking lot T	000_00T	(blank)	MAIN	Arlington
000-014	Parking lot 14	000_014	(blank)	MAIN	Arlington
000-024	Parking lot 24	000_024	(blank)	MAIN	Arlington
000-026	Parking Lot 26	000_026	(blank)	MAIN	Arlington
000-027	Parking Lot 27	000_027	(blank)	MAIN	Arlington
000-028	Parking lot 28	000_028	(blank)	MAIN	Arlington
000-029	Parking Lot 29	000_029	(blank)	MAIN	Arlington
000-034	Parking lot 34	000_034	(blank)	MAIN	Arlington
000-036	Parking lot 36	000_036	(blank)	MAIN	Arlington
000-038	Parking lot 38	000_038	(blank)	MAIN	Arlington
000-039	Parking lot 39	000_039	(blank)	MAIN	Arlington

9. Enter the **Custodian Transfer Date (today's date)**.
10. Enter or search for the **New Custodian**.
11. Enter or search for the **New Custodian Department**.
12. Enter **Comments (optional for Asset Transfer)**.

Note: If comments were entered, they will disappear from the Comments box and move below the box with a date/time stamp, the name of who made the asset update, and the comments if entered.

13. Click the **Submit** button to submit to Workflow Approval. Once submitted a Transaction ID will be assigned and the workflow approvals display.



Comments

Date Time: 03/22/2024 04:16 PM Status: Initial Updated by: Testing Asset Transfer Comment - New Location UAB

14. The Approval workflow will display with the status as Pending.

The screenshot displays the 'Asset Change Request' form. The 'Asset Details' section includes fields for Transaction ID (0000039482), Business Unit (UTARL), Asset ID (10000018837), Financing Code, Location (642-203), Current Custodian (Maverick, Sam), and Requester (Trinity, Star). The 'Approval Status' is 'In Process'. The 'Activity Type' section shows 'Asset Transfer' selected. Below this, there are fields for Date of Transfer (03/22/2024), New Location (642-203A), and New Custodian (Nedderman, Blaze). A 'Comments' section is present but empty. At the bottom, the 'Asset Transfer Approval-UTARL' workflow is shown, with the transaction ID and business unit highlighted in red. The workflow status is 'Pending'.

Note: Once approved the asset change will be made in UTShare.

Asset Removal

The Asset Removal option is used to obtain approvals to remove assets from campus temporarily.

The Asset details page has three panels:

- The **Asset Details panel** has the selected asset's current information including the asset classification, location, and custodian.
- The **Activity Type panel** determines the asset transaction. The information requested will change depending on the activity choice.

- The **Comments panel** is used to enter any necessary details about the asset change and is required for Asset Removal.

Steps to Submit Asset Removal

1. To create an Asset Removal Request, navigate to the Asset Change Request page: **NavBar > Financials > UTZ Customizations > Asset Management > Asset Change Request.**
2. Click the **Add a New Value** button.

Asset Change Request

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 Saved Searches

Transaction ID

Business Unit

Asset Identification

Tag Number

Approval Status

Department

Activity Type

[Show fewer options](#)

3. Enter Business Unit **UTARL**
4. Enter the Asset Tag Number
5. Click **Add**

Note: The asset ID and the tag number are related. Populating the asset tag will auto-populate the Asset Identification.

Asset Change Request

Add a New Value Find an Existing Value

Transaction ID

Business Unit

*Asset Identification

Tag Number

- Click the radio button beside **Asset Removal**.

Note: *The asset must be in an On-Campus location to submit this workflow.*

Asset Change Request

Asset Details

Transaction ID: 0000040863		Approval Status: Initial	
Business Unit: UTARL		Principle Investigator:	
Asset ID: 10000009397 APPLE MACBOOK PRO 15 IN		Asset Tag Number: 121365	
Financing Code		Building	Sector
Location: 662-110	Wetsel Service Center	662_110	110
Location Eff Date: 11/01/2022		Start Date	End Date
Department: 320506 Surplus Property		Project ID:	
Current Custodian:		Profile ID: 294CTL41	
Cust Eff Date: 11/01/2022		Serial ID: C02V40H8G8WL	
Asset Class: 294 Portable Apple CPU		Acquisition Date: 07/27/2017	
Requester: 1003456778 Nedderman, Blaze		Acquisition Code Purchased	
Asset Title:			

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Date of Removal: 03/26/2024	Building	Sector
New Location: 000-000	000_000	0
Custodian Transfer Date: 03/25/2024		
New Custodian: 6001234567	Maverick, Sam	

Comments

Date Time: 03/25/2024 12:29 PM Status: Initial Updated by: Asset Removal

- Enter the **Date of Removal** (today's date).
- Enter or search for the proper **Off-Campus location code**.

Look Up New Location

SetID UTARL

Location Code begins with

Description begins with

Short Description begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-46 of 46 Last

Location Code	Description	Short Description	Sector	Jurisdiction	City
000-000	OFFSITE	000_000	0	OFF	(blank)
000-AUSTIN	Austin	000_Austin	410	OFF	Austin
000-CERN	CERN	000_CERN	1	OFF	Arlington
000-DAL1	Dallas Tower 1111	000_DAL1	1180	OFF	Dallas
000-FERMI	FERMILAB	(blank)	1	OFF	Batavia
000-HOU	Houston	000_HOU	1.270	OFF	Houston

9. Enter required **Comments**.

- **Comments are required for Asset Removal.** “For home use or travel” is an appropriate comment for Removal. Do not enter personal addresses in the comments section.

Note: The *comments will disappear from the Comments box and move below the box with a date/time stamp, the name of who made the asset update, and the comments if entered.*

Comments

Save Submit

Date Time: 03/25/2024 12:29 PM Status: Initial Updated by: Asset Removal

10. Click **Submit** to submit for workflow approval, the Transaction ID will display in the Approval flow and the status will show as Pending.

Asset Change Request

Location: 662-110	Wetsel Service Center	Project ID: 662_110 110
Location Eff Date: 11/01/2022		Start Date End Date
Department: 320506	Surplus Property	Profile ID: 294CTL41
Current Custodian:		Serial ID: C02V40H8G8WL
Cust Eff Date: 11/01/2022		Acquisition Date: 07/27/2017
Asset Class: 294	Portable Apple CPU	Acquisition Code Purchased
Requester: 1003456789	River, Trinity	
Asset Title:		

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Date of Removal: 03/26/2024

New Location: 000-000 OFFSITE Building: 000_000 Sector: 0

Custodian Transfer Date: 03/25/2024

New Custodian: 6001234567 Maverick, Sam

Comments

Asset Transfer Approval-UTARL

TRANSACTION_ID=0000040863
BUSINESS_UNIT=UTARL, ASSET_ID=100000009397, TAG_NUMBER=121365
Pending

UTARL-Asset Transfer

Approved

Sam Maverick
New Custodian
03/25/24 - 12:30 PM

→

Pending

Multiple Approvers
Current Department Manager

Date Time: 03/25/2024 12:29 PM Status: Initial Updated by: Sam Maverick Asset Removal

Note: The Current Custodian is notified to Approve the transfer. Once approved the Current Department Manager will be notified to approve the final part of the process. Once approved the asset change will be made in UTShare.

Asset Return

An Asset Return Request is used to acknowledge receipt of an Offsite asset that has been returned to campus.

The Asset details page has three panels:

- The **Asset Details panel** has the selected asset’s current information including the asset classification, location, and custodian.
- The **Activity Type panel** determines the asset transaction. The information requested will change depending on the activity choice.
- The **Comments panel** is used to enter any necessary details about the asset change and is optional for Asset Return.

Steps to Submit Asset Return

1. Navigate to the Asset Change Request page: **NavBar > Financials > UTZ Customizations > Asset Management > Asset Change Request.**
2. Click the **Add a New Value** button.

Asset Change Request

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 Choose from recent searches Saved Searches Choose from saved searches

Transaction ID begins with

Business Unit begins with

Asset Identification begins with

Tag Number begins with

Approval Status =

Department begins with

Activity Type =

[Show fewer options](#)

3. Enter Business Unit **UTARL**
4. Enter the Asset Tag Number
5. Click **Add**

Note: The asset ID and the tag number are related. Populating the asset tag will auto-populate the Asset Identification.

Asset Change Request

Add a New Value Find an Existing Value

Transaction ID

Business Unit

*Asset Identification

Tag Number

6. Click the radio button beside **Asset Return**

Asset Change Request

Asset Change Request

Asset Details

Transaction ID: NEXT		Approval Status: Initial	
Business Unit: UTARL		Principle Investigator:	
Asset ID: 100000018835 LAPTOP MS SURFACE BOOK 3		Asset Tag Number: 130936	
Financing Code		Building	Sector
Location: 000-000	OFFSITE	000_000	0
Location Eff Date: 05/23/2023		Project ID:	Start Date End Date
Department: 340301	OIT Learning and Comms	Profile ID: 284CTL41	
Current Custodian: 1001234567	Joe, Bob	Serial ID: 006200601957	
Cust Eff Date: 05/23/2023		Acquisition Date: 08/22/2020	Acquisition Code Purchased
Asset Class: 284 Portable CPU (Not Apple)			
Requester:			
Asset Title:			

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Date of Return:

New Location:

Comments

Note: Asset Return Workflow is based on an Asset being returned from an Offsite location to an on-campus location. The asset must be in an Offsite location to submit this workflow.

5. Enter the **Date of Return** (today's date).
6. Enter or search for the **New Location**.

Look Up New Location

SetID: UTARL

Location Code: begins with

Description: begins with

Short Description: begins with

Basic Lookup

Search Results

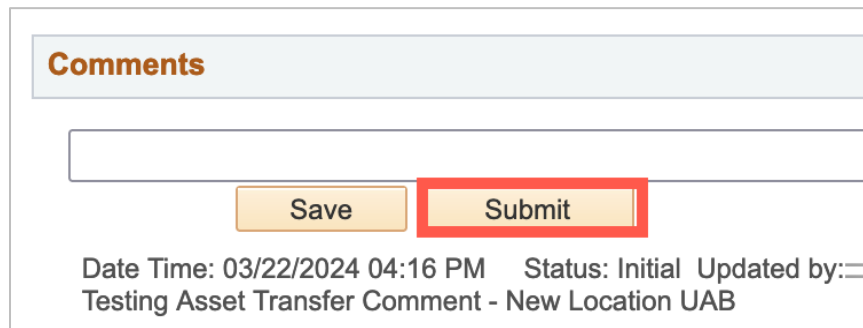
Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last

Location Code	Description	Short Description	Sector	Jurisdiction	City
000	USAS Mailcode	(blank)	(blank)	MAIN	(blank)
000-000	OFFSITE	000_000	0	MAIN	(blank)
000-00T	Parking lot T	000_00T	(blank)	MAIN	Arlington
000-014	Parking lot 14	000_014	(blank)	MAIN	Arlington
000-024	Parking lot 24	000_024	(blank)	MAIN	Arlington
000-026	Parking Lot 26	000_026	(blank)	MAIN	Arlington
000-027	Parking Lot 27	000_027	(blank)	MAIN	Arlington
000-028	Parking lot 28	000_028	(blank)	MAIN	Arlington
000-029	Parking Lot 29	000_029	(blank)	MAIN	Arlington
000-034	Parking lot 34	000_034	(blank)	MAIN	Arlington
000-036	Parking lot 36	000_036	(blank)	MAIN	Arlington
000-038	Parking lot 38	000_038	(blank)	MAIN	Arlington

7. Enter **Comments**. Comments are optional for Asset Return.

Note: *The comments will disappear from the Comments box and move below the box with a date/time stamp, the name of who made the asset update, and the comments if entered.*



The screenshot shows a user interface for entering comments. At the top, there is a header labeled "Comments" in a light blue box. Below this is a large, empty text input field. Underneath the input field are two buttons: "Save" and "Submit". The "Submit" button is highlighted with a red border. Below the buttons, there is a line of text providing metadata: "Date Time: 03/22/2024 04:16 PM Status: Initial Updated by: Testing Asset Transfer Comment - New Location UAB".

8. Click the **Submit** button to submit to Workflow Approval. Once submitted a Transaction ID will be assigned and the workflow approvals display.

Note: *The Current Department Manager will be notified to approve. Once approved the asset change will be made in UTShare.*

Asset Transfer to Surplus

The Asset Transfer to Surplus request is used to transfer items to Surplus Property. Surplus Property is property that exceeds the University’s needs and is not required for the University’s foreseeable needs. The term includes used or new property that retains some usefulness for the purpose for which it was intended or for another purpose.

The Asset details page has three panels:

- The **Asset Details panel** has the selected asset’s current information including the asset classification, location, and custodian.
- The **Activity Type panel** determines the asset disposition. The information requested will change depending on the activity choice.
- The **Comments panel** is used to enter any necessary details about the asset change and is required for Transfers to Surplus.

Steps to Submit Transfer to Surplus

1. Navigate to the Asset Change Request page: **NavBar > Financials > UTZ Customizations > Asset Management > Asset Change Request.**
2. Click the **Add a New Value** button.

Asset Change Request

Find an Existing Value

▼ **Search Criteria**

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

+ Add a New Value

🕒 Recent Searches Choose from recent searches ✎

🔖 Saved Searches Choose from saved searches ✎

Transaction ID	begins with	<input type="text"/>	
Business Unit	begins with	<input type="text"/>	🔍
Asset Identification	begins with	<input type="text"/>	🔍
Tag Number	begins with	<input type="text"/>	🔍
Approval Status	=	<input type="text"/>	
Department	begins with	<input type="text"/>	🔍
Activity Type	=	<input type="text"/>	

^ Show fewer options

Search
Clear

3. Enter Business Unit **UTARL**
4. Enter the **Tag Number**.
5. Click **Add**

Note: The asset ID and the tag number are related. Populating the asset tag will auto-populate the Asset Identification.

Asset Change Request

Add a New Value
Find an Existing Value

Transaction ID:

Business Unit:

*Asset Identification:

Tag Number:

6. Click the radio for **Asset Transfer to Surplus**.

Asset Change Request

Asset Details

Transaction ID: 0000040865		Approval Status: Initial	
Business Unit: UTARL		Principle Investigator:	
Asset ID: 100000011895	LAPTOP DELL LATITUDE 7490	Asset Tag Number: 123608	
Financing Code		Building	Sector
Location: 642-213	University Administration Bldg	642_213	213
Location Eff Date: 05/01/2023		Project ID:	Start Date End Date
Department: 340301	OIT Learning and Comms	Profile ID: 284CTL41	
Current Custodian: 1001234567	Trinity, River	Serial ID: 2F9JNQ2	
Cust Eff Date: 05/01/2023		Acquisition Date: 08/01/2018	Acquisition Code: Purchased
Asset Class: 284	Portable CPU (Not Apple)		
Requester: 6001234567	Maverick, Sam		
Asset Title:			

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Sanitization Date:

Sanitization Method:

Date of Surplus:

New Location: <input type="text" value="662-110"/>	Wetsel Service Center	Building	Sector
		662_110	110

Custodian Transfer Date:

Surplus Department ID:

Surplus Property

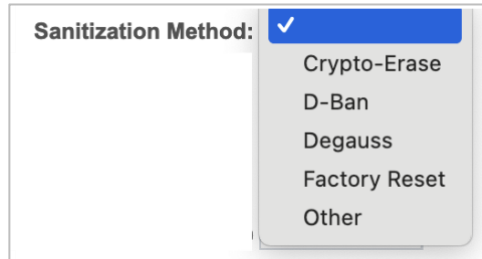
Comments

Enter Required comments here

Date Time: 03/28/2024 11:12 AM Status: Initial Updated by: Maverick, Sam
Transferring to surplus.

7. Enter the **Sanitization Date**.
 - a. This is typically today’s date or the date the ASSET was sanitized (*please coordinate with IT to have the HD erased*).
8. Click the drop-down arrow to Search for the **Sanitization Method**.

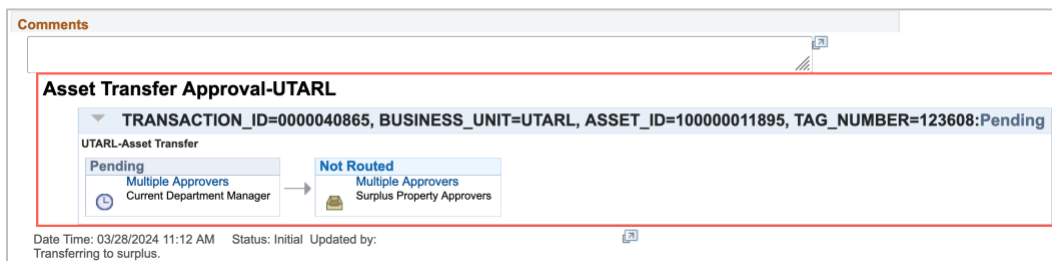
- a. **Crypto-Erase**
- b. **D-Ban**
- c. **Degauss**
- d. **Factory Reset**
- e. **Other**



9. Enter the **Date of Surplus**. (today’s date)
10. The New Location (Surplus Location ID) will default to 662-110. (no change needed).
11. The Surplus Department ID will default to 320506. (no change needed).
12. Enter required **Comments**:
 - a. Cost center or Project to charge for the HD destruction.
 - b. Will drop off at the dock or please schedule a pick-up.

Note: *The comments will disappear from the Comments box and move below the box with a date/time stamp, the name of who made the asset update, and the comments if entered.*

13. Click the **Submit** button to submit to Workflow Approval. Once submitted a transaction ID will be assigned and the workflow approvals display.



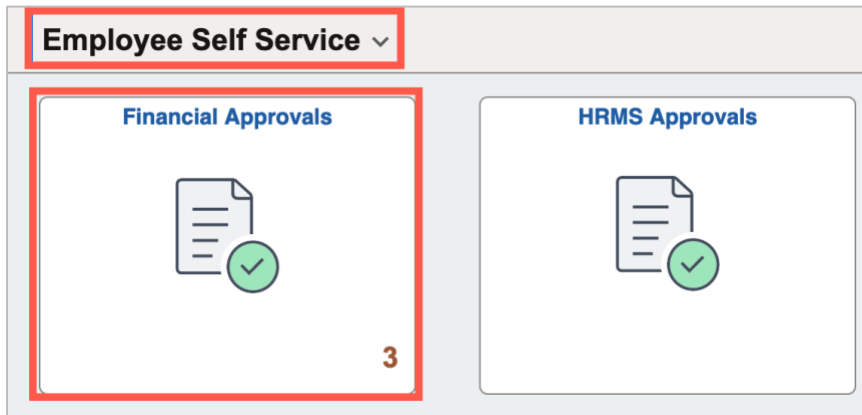
Note: *The approvals vary depending on the type of asset and other factors. At times the PI, Auto Shop, Facilities Management, and Grants and Contracts may be in the workflow in addition to the Department Head and Inventory/Distribution Services.*

Approvals

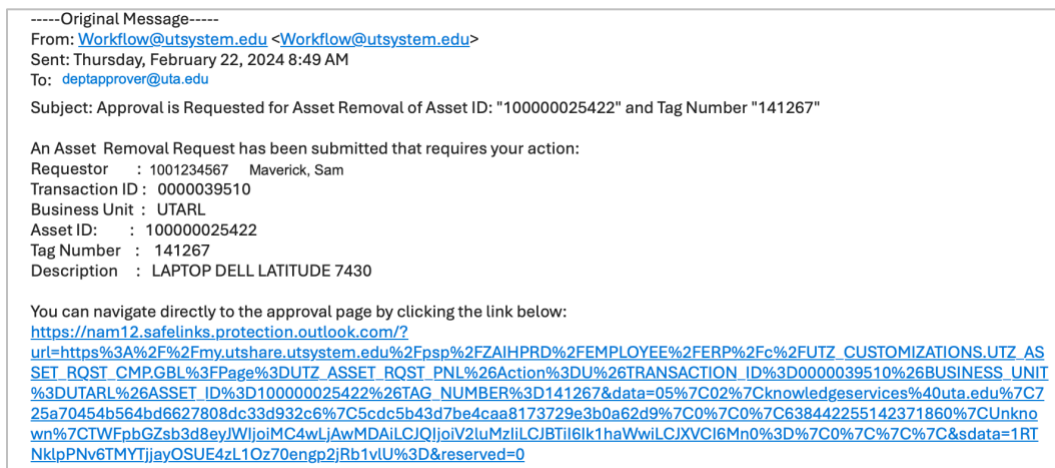
There are multiple ways to approve asset transfers.

Navigation


1. The **Financial Approval Tile** from the Employee Self-Service page.

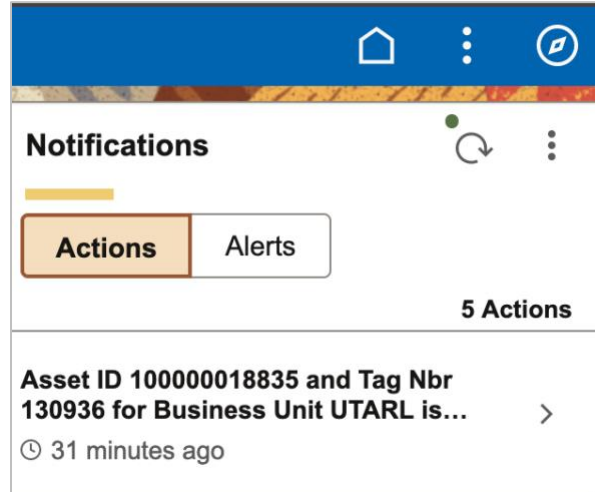


2. The **Email Notification**. An email notification will come into the approver’s inbox with a link that can be used to navigate to the approval screen. The user must be logged in to UTShare for the link to work. See an example email below:



Note: There are known issues using the link from the UTShare-generated emails. If the link does not work to access the approvals screen, navigate to the document through the Financial Approvals tile.

3. Approve through UTShare Notifications, if the Notifications pane on the right is not displaying, click on the bell  icon in the top right nav bar. The actions and alerts will be displayed.



- a. Click on the Asset ID to get to the approval screen.

4. Navigating to the Asset Transfer Page via the Navbar: **Financials > UTZ Customizations > Asset Management > Asset Change Request**

- a. Enter the Transaction ID.
 - b. Enter UTARL in the Business Unit field.
 - c. Click Search.

Asset Change Request

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 Choose from recent searches Saved Searches Choose from saved searches

Transaction ID begins with

Business Unit begins with

Asset Identification begins with

Tag Number begins with

Approval Status =

Department begins with

Activity Type =

[Show fewer options](#)

Search Clear Save Search

▼ Search Results

1 rows - User ID "1000153780" Report ID "0000040868" +1 more

Transaction ID	Business Unit	Asset Identification	Tag Number	Approval Status	Department	Activity Type	
0000040868	UTARL	100000018835	130936	In Process	340301	Return	>

Note: The asset ID and the tag number are related. Populating the asset tag will auto-populate the Asset Identification.

Reviewing Asset Transfer

The navigation paths mentioned above will take you to the page to approve the asset transfer.

5. Review the asset details and the comments.
6. Click the **Approve** button.

Asset Change Request

Asset Details

Transaction ID: 0000040865	Approval Status: In Process
Business Unit: UTARL	Principle Investigator:
Asset ID: 100000011895 LAPTOP DELL LATITUDE 7490	Asset Tag Number: 123608
Financing Code	Building Sector
Location: 642-213 University Administration Bldg	642_213 213
Location Eff Date: 05/01/2023	Project ID:
Department: 340301 OIT Learning and Comms	Profile ID: 284CTL41
Current Custodian: 1001234567	Serial ID: 2F9JNQ2
Cust Eff Date: 05/01/2023	Acquisition Date: 08/01/2018
Asset Class: 284 Portable CPU (Not Apple)	Acquisition Code Purchased
Requester: 1001234567 Trinity, River	
Asset Title:	

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Sanitization Date: 03/27/2024

Sanitization Method: Factory Resi

Date of Surplus: 03/26/2024

New Location: 662-110 Wetsel Service Center	Building Sector	662_110 110
--	--------------------	----------------

Custodian Transfer Date: 03/25/2024

Surplus Department ID: 320506 Surplus Property

Comments

Approve Deny

Asset Transfer Approval-UTARL

TRANSACTION_ID=0000040865, BUSINESS_UNIT=UTARL, ASSET_ID=100000011895, TAG_NUMBER=123608:Pending

UTARL-Asset Transfer

<p style="background-color: #e0e0e0; padding: 2px;">Pending</p> <p style="font-size: 8px;">Multiple Approvers Current Department Manager</p>	→	<p style="background-color: #e0e0e0; padding: 2px;">Not Routed</p> <p style="font-size: 8px;">Multiple Approvers Surplus Property Approvers</p>
--	---	---

The approval will display with a green checkmark and the workflow will progress on to the next.

Comments

Asset Transfer Approval-UTARL

TRANSACTION_ID=0000040865, BUSINESS_UNIT=UTARL, ASSET_ID=100000011895, TAG_NUMBER=123608:Pending

UTARL-Asset Transfer

<p style="background-color: #e0ffe0; padding: 2px;">Approved</p> <p style="font-size: 8px;">Nedderman, Blaze Current Department Manager 03/28/24 - 5:01 PM</p>	→	<p style="background-color: #e0e0e0; padding: 2px;">Pending</p> <p style="font-size: 8px;">Multiple Approvers Surplus Property Approvers</p>
--	---	--

Date Time: 03/28/2024 11:12 AM Status: Initial Updated by: _____

Transferring to surplus.

Return to Search
 Previous in List
 Next in List