

Asset Transfer Job Aid

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 + 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

Transaction ID

Business Unit

*Asset Identification

Tag Number

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: 10000018837 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
Current Custodian: 1000345891 Sam, Maverick	Cust Eff Date: 06/26/2023	Profile ID: 284CTL41	End Date
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:

New Location:

Custodian Transfer Date:

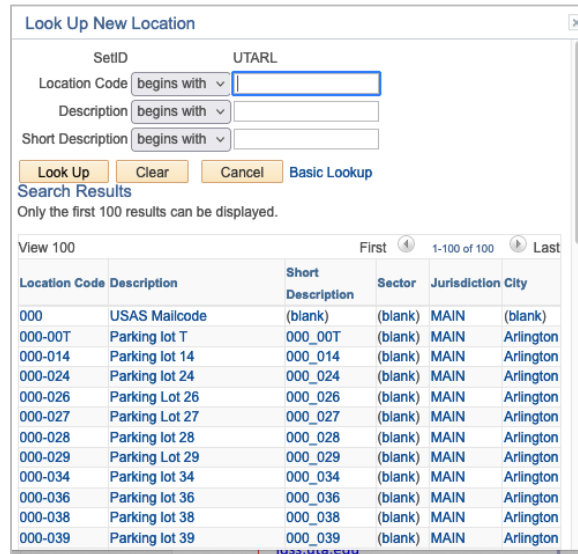
New Custodian:

New Department:

Comments

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

8. Enter or search  for the **New 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

Only the first 100 results can be displayed.

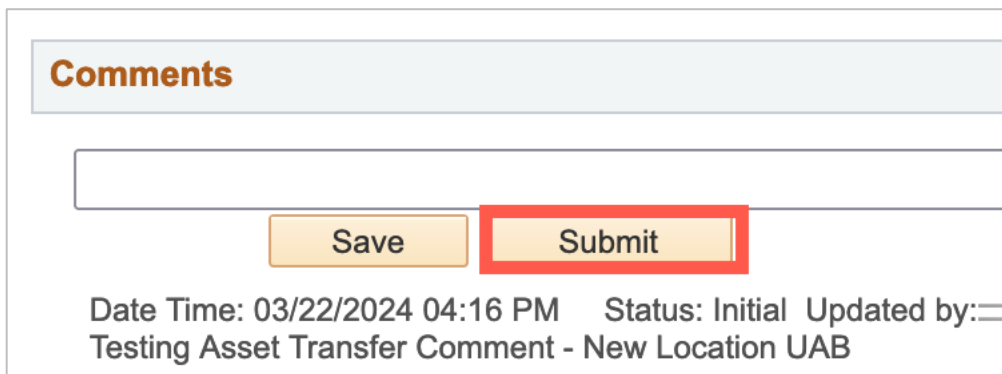
View 100 First 1-100 of 100 Last

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

Save **Submit**

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.

Asset Change Request

Asset Details

Transaction ID: 0000039482		Approval Status: In Process	
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			Start Date End Date
Department: 340301 OIT Learning and Comms		Project ID:	
Current Custodian: 1001234556 Maverick, Sam		Profile ID: 284CTL41	
Cust Eff Date: 06/26/2023		Serial ID: 024969501157	
Asset Class: 284 Portable CPU (Not Apple)		Acquisition Date: 08/22/2020	
Requester: 1234567890 Trinity, Star		Acquisition Code Purchased	
Asset Title:			

Activity Type

Asset Transfer
 Asset Removal
 Asset Return
 Asset Transfer to Surplus

Date of Transfer: 03/22/2024	Building	Sector
New Location: <input type="text" value="642-203A"/> University Administration Bldg	642_203A	203A
Custodian Transfer Date: 03/25/2024		
New Custodian: 6001628401 Nedderman, Blaze		
New Department: 340101 OIT Planning and Management		

Comments

Asset Transfer Approval-UTARL

TRANSACTION ID=0000039482, BUSINESS_UNIT=UTARL, ASSET_ID=100000018837, TAG_NUMBER=130938
Pending

UTARL-Asset Transfer

Approved

Sam Maverick
Transferring Inventory Contact
03/22/24 - 4:21 PM

→

Pending

Multiple Approvers
Current Department Manager

→

Not Routed

Multiple Approvers
New Department Manager

→

Not Routed

Multiple Approvers
AM-Inventory services

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