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.
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.

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.

7. Enter the Date of Transfer (Use today’s date).
8. Enter or search for the **New Location** code.

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

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