



ADDY NOTES



Creating an Asset Transfer Request

This Addy Note explains how to transfer an asset to a department or person.

| Step | Action | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|--|---|----------------|------|-------------|----------|-------|----------|------|------------|---------|--|--|--|--|--|--|----------|--|--|--|--|--|--|----------|--|--|--|--|--|--------------------------------------|----------|--|--|--|--|--|--|----------|--|--|--|--|--|
| 1. | <p>Your role in UCF Financials dictates where you view assets.</p> <ul style="list-style-type: none"> A Property Custodian (PCT) navigates to Main Menu > Employee Self-Service > Assets > View/Transfer Assets. A Dean, Director, or Chair (DDC) or Responsible Fiscal Officer (RFO) navigates to Main Menu > Manager Self-Service > Assets > View Department Asset. <p>Note: The DDC or RFO will then click the appropriate department from the list.</p> <div data-bbox="311 1050 1380 1512" style="border: 1px solid black; padding: 5px;"> <p>My Departments</p> <p>Rebekah Lynn Addy</p> <p>Click a Department link to view a list of department's assets.</p> <table border="1" data-bbox="321 1228 1364 1491"> <thead> <tr> <th colspan="2">My Departments</th> <th>Personalize</th> <th>Find</th> <th>First</th> <th>1-4 of 4</th> <th>Last</th> </tr> <tr> <th>Department</th> <th>Dept ID</th> <th colspan="5"></th> </tr> </thead> <tbody> <tr> <td>FIXED ASSETS- TFRD FM UCF CONV</td> <td>00030002</td> <td colspan="5"></td> </tr> <tr> <td>FIXED ASSETS- TFRD FM UCF STAD</td> <td>00030003</td> <td colspan="5"></td> </tr> <tr> <td>CREOL-BALANCE GLEBOV</td> <td>02400000</td> <td colspan="5"></td> </tr> <tr> <td>FN ACT-STU ACCTS-FIN AID</td> <td>02500401</td> <td colspan="5"></td> </tr> </tbody> </table> </div> | My Departments | | Personalize | Find | First | 1-4 of 4 | Last | Department | Dept ID | | | | | | FIXED ASSETS- TFRD FM UCF CONV | 00030002 | | | | | | FIXED ASSETS- TFRD FM UCF STAD | 00030003 | | | | | | CREOL-BALANCE GLEBOV | 02400000 | | | | | | FN ACT-STU ACCTS-FIN AID | 02500401 | | | | | |
| My Departments | | Personalize | Find | First | 1-4 of 4 | Last | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Department | Dept ID | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| FIXED ASSETS- TFRD FM UCF CONV | 00030002 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| FIXED ASSETS- TFRD FM UCF STAD | 00030003 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| CREOL-BALANCE GLEBOV | 02400000 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
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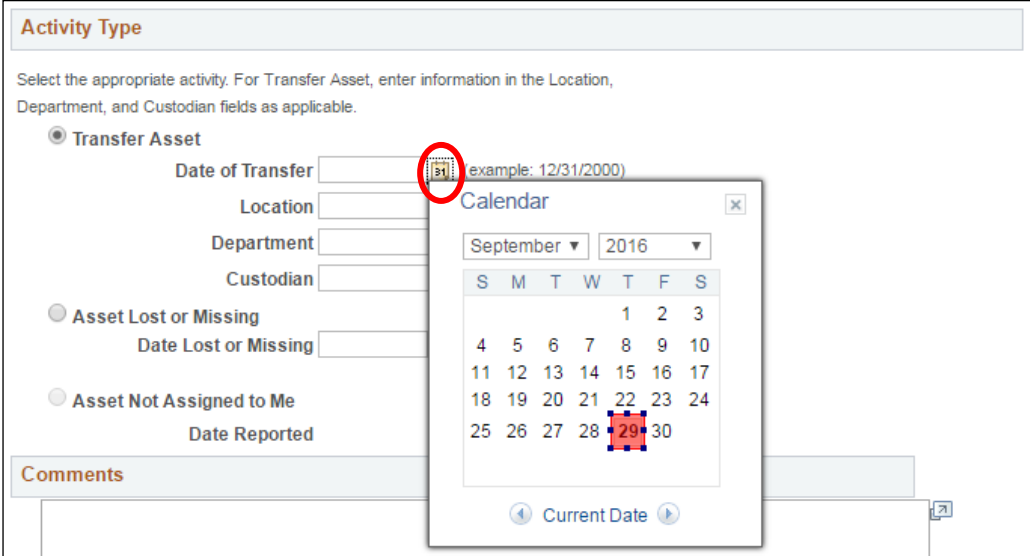
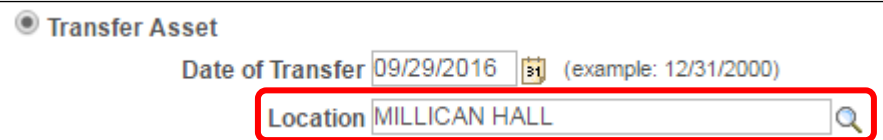


| Step | Action | | | | | | | | | | | | | | | | | | | | |
|-------------------------|--|--------------------------------|--------|--|--|--|-------|------------|------------|--------|--|-----------|-------------|--------------------------------|---|----------|------------|-------------|--------------------------------|---|----------|
| 2. | <p>The My Assets page displays for PCTs while the My Department Assets page displays for DDCs and RFOs. On either page click the Transfer button at the end of the row for the asset that you want to transfer. The Transfer button is used for both asset transfer requests and for requests to declare an asset lost or missing.</p> <div data-bbox="310 680 1393 1010" style="border: 1px solid black; padding: 5px;"> <p>My Assets Rebekah Lynn Addy</p> <p>Click an Asset link to view asset detail information. Click the Status link to view Approval Status or click Transfer to submit a Transfer Request.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="4" style="text-align: left;">Transaction Information</th> <th style="text-align: right;">Personalize Find [Print Icon] [Refresh Icon]</th> </tr> <tr> <th style="width: 20%;">Asset</th> <th style="width: 20%;">Tag Number</th> <th style="width: 40%;">Department</th> <th style="width: 10%;">Status</th> <th style="width: 10%;"></th> </tr> </thead> <tbody> <tr> <td>Furniture</td> <td>4940TST8888</td> <td>FIX-FIXED ASSETS INVEST IN PLT</td> <td>-</td> <td style="text-align: right;">Transfer</td> </tr> <tr> <td>ADMIN DESK</td> <td>4940TST9999</td> <td>FIX-FIXED ASSETS INVEST IN PLT</td> <td>-</td> <td style="text-align: right;">Transfer</td> </tr> </tbody> </table> </div> <p>Note: The tag numbers that display on the My Assets/My Department Assets page for each employee are only for those assets where the employee’s Empl ID has been designated as the asset custodian in Asset Management.</p> | Transaction Information | | | | Personalize Find [Print Icon] [Refresh Icon] | Asset | Tag Number | Department | Status | | Furniture | 4940TST8888 | FIX-FIXED ASSETS INVEST IN PLT | - | Transfer | ADMIN DESK | 4940TST9999 | FIX-FIXED ASSETS INVEST IN PLT | - | Transfer |
| Transaction Information | | | | Personalize Find [Print Icon] [Refresh Icon] | | | | | | | | | | | | | | | | | |
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| 3. | <p>The Asset Transfer Request page appears. Under the Activity Type heading select the Transfer Asset radio button.</p> <div data-bbox="310 1283 1369 1749" style="border: 1px solid black; padding: 5px;"> <p>Activity Type</p> <p>Select the appropriate activity. For Transfer Asset, enter information in the Location, Department, and Custodian fields as applicable.</p> <p><input checked="" type="radio"/> Transfer Asset</p> <p style="margin-left: 40px;">Date of Transfer <input type="text"/> [Calendar Icon] (example: 12/31/2000)</p> <p style="margin-left: 40px;">Location <input type="text"/> [Search Icon]</p> <p style="margin-left: 40px;">Department <input type="text"/> [Search Icon]</p> <p style="margin-left: 40px;">Custodian <input type="text"/> [Search Icon]</p> <p><input type="radio"/> Asset Lost or Missing</p> <p style="margin-left: 40px;">Date Lost or Missing <input type="text"/> [Calendar Icon] (example: 12/31/2000)</p> <p><input type="radio"/> Asset Not Assigned to Me</p> <p style="margin-left: 40px;">Date Reported (example: 12/31/2000)</p> </div> | | | | | | | | | | | | | | | | | | | | |



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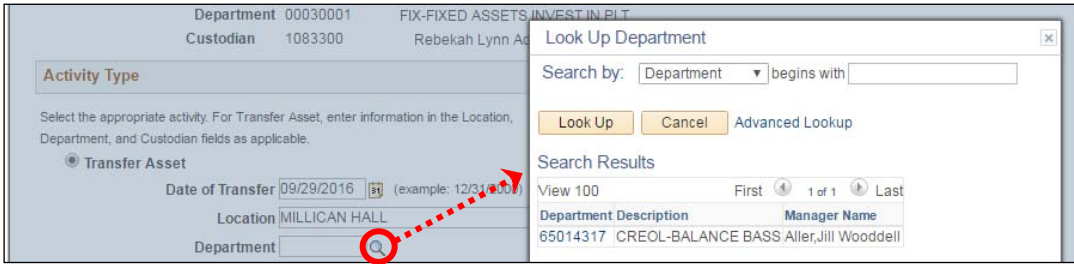
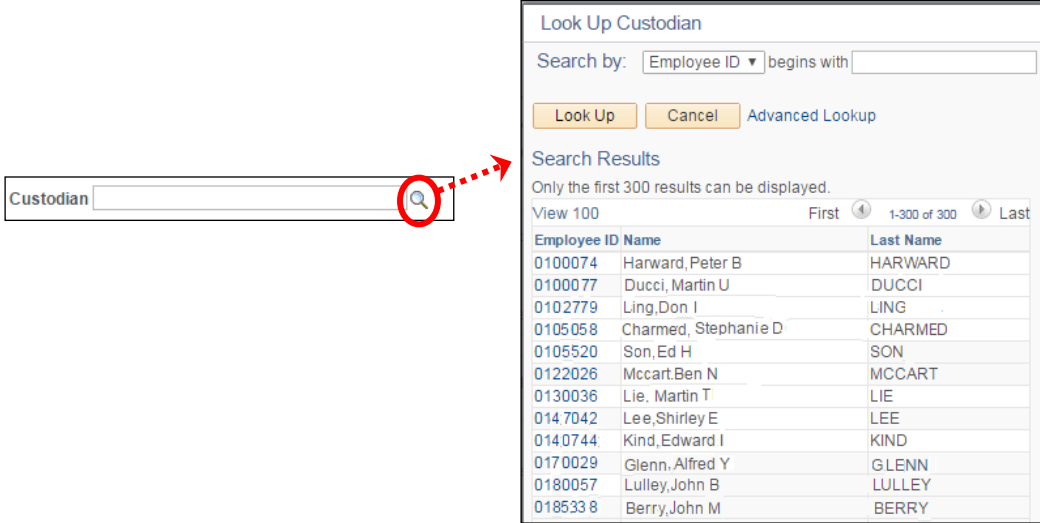


| Step | Action |
|------|--|
| 4. | <p>Enter the date of the transfer in the Date of Transfer field, or click the calendar icon and select a date to populate the field.</p>  |
| 5. | <p>Enter the location code in the Location field, or use the lookup icon (magnifying glass) to select a code.</p>  <p>Note: If you don't know the code, leave the field blank. Before the receiving department's PCT or RFO approves the request, he or she should use the Asset Transfer Request page to enter the code for the location where the asset will reside.</p> |



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|------|--|
| 6. | <p>Enter the code for the receiving department in the Department field, or click the lookup icon to search for a department.</p>  |
| 7. | <p>In the Custodian field, insert the Empl ID of the PCT for the receiving department, or click the lookup icon to search.</p>  <p>Note: Before completing this field, verify that the employee you are selecting is listed as a PCT on the Departmental Authorization List (DAL) for the receiving department.</p> <p>Accomplish this task by doing the following:</p> <ol style="list-style-type: none"> 1. Navigate to Main Menu > Departmental Authorization > Dept/Project Authorizations. 2. Perform a search for a SpeedType Key (receiving department). 3. On the Dept/Proj Auth page verify that the employee's Empl ID displays with a Department Authorization status of PCT-Property Custodian. |



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|------------|---|---------|-------------|---|-------------|----------|------------|-------------------|---------|------------|---|
| 8. | <p>In the Comments section, explain that you're transferring an asset to a person or department, whichever applies. For instance, "Transferring Asset X from Person/Dept Y to Person/Dept Z." You will not be able to submit your request unless you complete this step.</p> <div data-bbox="310 680 1328 848" style="border: 1px solid gray; padding: 5px;"> <p>Comments</p> <p>From department #65014319 to department #65014317</p> </div> <p>Note: If the request is for a mass transfer of assets from one department to another department, enter the following comment: <i>"Mass transfer from department #XXXXXXXX to department #YYYYYYYY"</i> (where X and Y represents the department numbers).</p> | | | | | | | | | | |
| 9. | <p>Click Submit. Your transfer is complete.</p> | | | | | | | | | | |
| 10. | <p>Review the information on the Submit Confirmation page. Then, click OK.</p> <div data-bbox="310 1169 1357 1661" style="border: 1px solid gray; padding: 10px;"> <p>Asset Transfer Request</p> <p>Submit Confirmation</p> <p><input checked="" type="checkbox"/> The Submit was successful.</p> <hr/> <p>Approval Process Personalize Find </p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Role</th> <th style="width: 25%;">Name</th> <th style="width: 15%;">Status</th> <th style="width: 15%;">Submit Date</th> <th style="width: 30%;">Comments</th> </tr> </thead> <tbody> <tr> <td>Originator</td> <td>Rebekah Lynn Addy</td> <td>Pending</td> <td>09/30/2016</td> <td>From department #65014319 to department #65014317</td> </tr> </tbody> </table> <p style="text-align: center; margin-top: 10px;">OK</p> </div> | Role | Name | Status | Submit Date | Comments | Originator | Rebekah Lynn Addy | Pending | 09/30/2016 | From department #65014319 to department #65014317 |
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| 11. | <p>On the My Assets/My Department Assets page the asset's Status has updated to Pending.</p> <div data-bbox="305 604 1399 932" style="border: 1px solid black; padding: 5px;"> <p>My Assets</p> <p>Rebekah Lynn Addy</p> <p>Click an Asset link to view asset detail information. Click the Status link to view Approval Status or click Transfer to submit a Transfer Request.</p> <table border="1" data-bbox="321 772 1383 919"> <thead> <tr> <th colspan="4" data-bbox="321 772 922 800">Transaction Information</th> <th data-bbox="922 772 1068 800">Personalize</th> <th data-bbox="1068 772 1117 800">Find</th> <th data-bbox="1117 772 1166 800">First</th> <th data-bbox="1166 772 1214 800">1-2 of 2</th> <th data-bbox="1214 772 1263 800">Last</th> </tr> <tr> <th data-bbox="321 800 467 827">Asset</th> <th data-bbox="467 800 662 827">Tag Number</th> <th data-bbox="662 800 1068 827">Department</th> <th data-bbox="1068 800 1198 827">Status</th> <th colspan="5"></th> </tr> </thead> <tbody> <tr> <td data-bbox="321 827 467 854">Furniture</td> <td data-bbox="467 827 662 854">4940TST8888</td> <td data-bbox="662 827 1068 854">FIX-FIXED ASSETS INVEST IN PLT</td> <td data-bbox="1068 827 1198 854">Pending</td> <td colspan="5" data-bbox="1198 827 1383 854">Transfer</td> </tr> <tr> <td data-bbox="321 854 467 882">ADMIN DESK</td> <td data-bbox="467 854 662 882">4940TST9999</td> <td data-bbox="662 854 1068 882">FIX-FIXED ASSETS INVEST IN PLT</td> <td data-bbox="1068 854 1198 882">-</td> <td colspan="5" data-bbox="1198 854 1383 882">Transfer</td> </tr> </tbody> </table> </div> <p>Note: Your asset transfer will be processed after the approver of the receiving department approves the transfer.</p> | Transaction Information | | | | Personalize | Find | First | 1-2 of 2 | Last | Asset | Tag Number | Department | Status | | | | | | Furniture | 4940TST8888 | FIX-FIXED ASSETS INVEST IN PLT | Pending | Transfer | | | | | ADMIN DESK | 4940TST9999 | FIX-FIXED ASSETS INVEST IN PLT | - | Transfer | | | | |
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