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Overview

To complete the tasks demonstrated in this work instruction, you must have a role in Workday. In AssetWorks, Workday’s nightly user and profile integration maintain cost center user profiles.

Submitting a transfer request or searching for an asset

Departmental AssetWorks users may need to request access to the department data entry specialist — property control role, along with their responsible cost center.

Approving a transfer request

Departmental AssetWorks users may need to request access as a cost center manager to approve transfer requests. Approvers will only access assets assigned to their approved Workday cost centers.

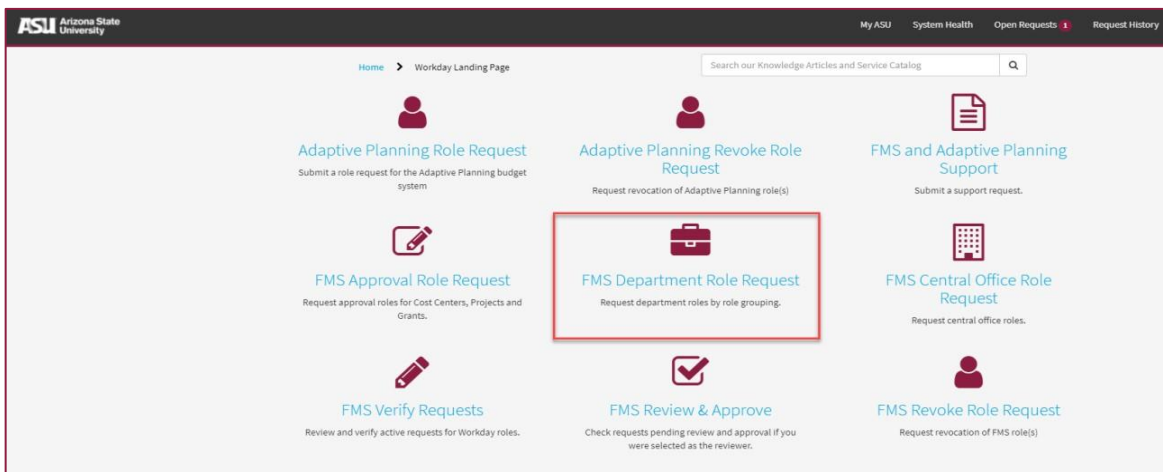
Departmental AssetWorks users will only have access to assets assigned to their approved Workday cost centers.

[Apply for a role via ServiceNow](#) using Workday role provisioning.

Gain access to AssetWorks

[Navigate to ServiceNow](#) and complete the following steps:

1. Apply for a role using the Workday Role Requests provisioning process.



2. Click on **FMS Department Role Request** and complete the form.

Department Role Request - new record

Department Role Request

*Requested for: Shannon Beyer (slcunn12) State: Draft

Department: UBS PUR Technology Number: DRR0041167

Supervisor: Patricia Taylor (pltaylor)

Email Address: Shannon.L.Beyer@asu.edu

Phone Number: 602/496-0561

Are you requesting a Dean/Director or Provost/VP role(s)? No

*Roles: Department Data Entry Specialist - Property Control (ASU) *Make sure to choose "Property Control"*

*Reviewer: Benjamin Martin (bdmart13) - CCH097 SDA Administration *Choose your Cost Center Mgr./Reviewer*

*Organizations: CCH161 Supply Chain Management *Chose your Cost Center*

Justification/Message to Reviewer: Please provide Shannon access to AssetWorks. She needs to be able to transfer requests.

Submit

Note: Multiple cost centers can be listed as needed.

Sign into AssetWorks

[Login to AssetWorks](#) using the single-sign-on link, your ASURITE ID and password. The AssetWorks homepage will appear.

Description	Total Count	Total Amount
Active Asset up to previous day	37066	\$590,074,743.06
Newly Created Assets of the current day	6	\$0.00
Disposals for the entire day	0	\$0.00

User Info: Name: CESAR PEREZ AMAYA

If you only see the **Home** tab, you still need to request a Workday role for access to your cost centers.

Search for an asset

Use this process when searching for an asset to set up a transfer request for disposal. The first step in the transfer process is to search for an item with a tag number or property control number attached to it. **Note:** The tag number or property control number is seven and typically starts with four or six.

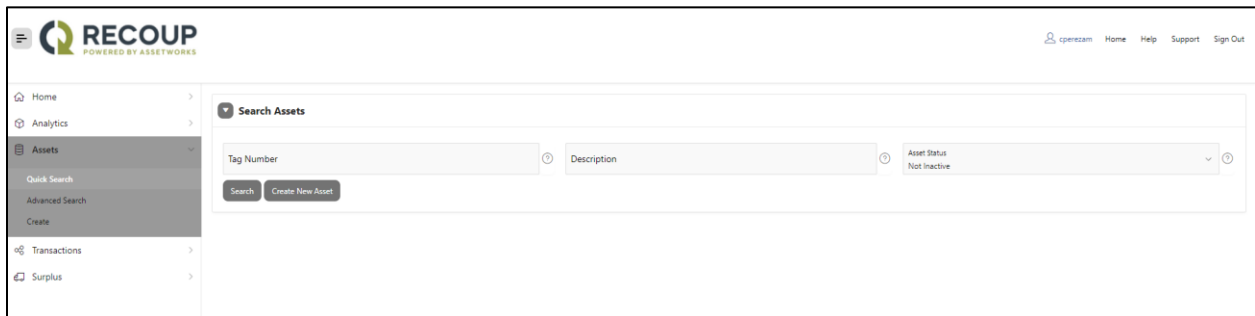


Yellow tags are government-related, and you must [contact Capital Assets Management](#). AssetWorks will typically show federally funded assets as active unless Capital Asset Management has already approved and executed the asset's disposition.



If there is not a property control number, you can search for a non-tagged asset by completing the following:

1. Click the **Assets** tab.
2. The **Search Assets** window will display.
3. Type in the description.



4. Complete the following fields:

Field	Action
Tag Number	Enter the asset tag number if you have it.
Description	Enter a description of the asset if you are searching by description.
Asset Status	Select an asset status to filter your results to a particular status. Depending on your access level, you may not see all these statuses: <ul style="list-style-type: none"> • All. • Active. • In online auction. • In transfer. • Inactive. • Not inactive. • On a lot. • Pending receipt.

5. Click **Search**. A list of assets will display based on the search criteria.

Note: You may receive many results if you run a broad search. Check the bottom right corner of the search results to see the number of results, and click through the pages using the **next** button.

6. To open a line on the results page, click the view icon . The **Detail Page** will appear.

View	Business Asset Number	Accounting Date	Accounting Type	Accounting Method Desc	Accounting Cost	Transaction ID
	-	01/13/2020	Original Acquisition	Original Purchase	\$0.00	18059

The Detail Page will display information about the asset — asset, IT asset and capitalized asset — including the cost center. This information is necessary if you wish to complete a transfer next.

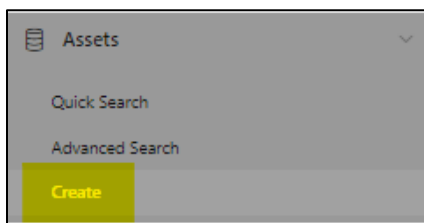
Tip: If you plan to do a transfer next, make a note of the cost center for the asset you want to transfer.

Note: If the property control number does not populate in the Create an Asset field, it may belong to another cost center or not in the system. If the asset belongs to another cost center, it will state it when trying to create an asset. [Contact Capital Assets Management](#) with questions or for more information about your asset.

Add an asset

Complete the following steps when you need to add an asset to the system:

1. Click the Assets Tab.
2. Under the Assets sidebar, click the Create option.



3. The **Asset Insert** page will appear. Complete as much information as possible.
 - a. Asterisks indicate which fields are required. It is recommended that you complete the non-asterisk fields so Surplus Property and other departments can better identify and track assets.

4. Once the Asset is created, the property control number will be saved in the system.

There are three options to save the asset:

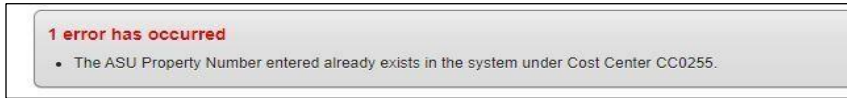
- **Save and View** — the asset will be saved and information can be previewed.
- **Save and Same** — the asset will be saved and an **Asset Insert** page will open to create a new asset with similar fields.
- **Save and New** — the asset will be saved and an empty **Asset Insert** page will open to create a new asset.



Error messages

Error messages will appear on the top right corner of the page for an incomplete asterisk field or a property control number already active in the system.

If the property control number is active in the system, the user may need to transfer or contact the department to transfer it from the correct cost entry.



Note: Assets can also be created under the **Transfer** tab when a new surplus transfer is made. These assets will be created to be sent to Surplus Property. If a department needs to keep track of its assets, they need to be created under the **Asset** tab. An error message will also occur when a property control number belongs to another cost center.

Submit a transfer request

Overview

To complete the tasks demonstrated in this work instruction, you must have a role in Workday. In AssetWorks, Workday's nightly user and profile integration maintain cost center user profiles.

Submitting a transfer request or searching for an asset

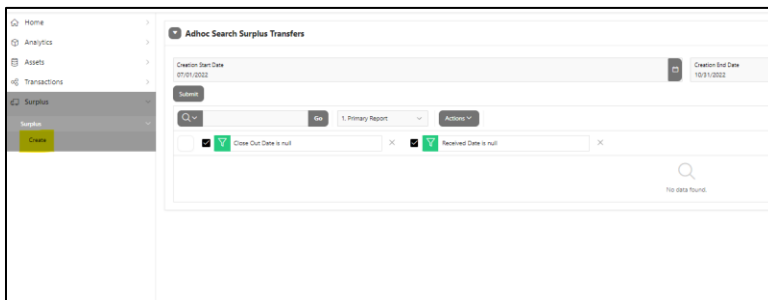
Departmental AssetWorks users may need to request access as a department data entry specialist — property control, along with their responsible cost center.

[Apply for a role via ServiceNow](#) using the Workday role provisioning process. Complete the following when you need to dispose of surplus items:


1. Create and submit the request in AssetWorks for approval.
2. Once approved, your request will generate a pickup for the items that must be transferred to Surplus Property.

To submit a transfer request, please complete the following steps:

1. Click the **Surplus** tab. In the dropdown menu, you will see the option **Create**.




2. Complete the following fields:

Field	Action
From the cost center	The cost center field is prepopulated and assigned to the user in PeopleSoft. You can change this field if you have access to more than one cost center.
Pickup or delivery type	Select third-party delivery or scheduled Surplus Property pickup. A third-party delivery is a moving company or the department requesting the transfer.
Building	Enter the building where the surplus items are located. Note: The system will perform a smart search based on the text you provide. 
Room	Enter the room or cube number where the surplus items are located.
Contact information	The contact information fields will prepopulate with your contact information, but you may change this information if you are not the contact.
Terms and conditions checkbox	Read the terms and conditions and check the box to indicate that you agree.

3. Click **Create** to generate the transfer request header.
4. Next, identify which assets will be sent to Surplus Property. If you have a tag number or an ASU property control number, enter it in the **Tag Number** field. Each tag number and ASU property control number must be submitted on a separate line on the transfer request.
5. If the items you wish to send to Surplus Property do not have a tag number or an ASU property control number, click **Create New Asset**.

6. If you are creating a new asset, the **Insert Surplus Asset** page will appear.

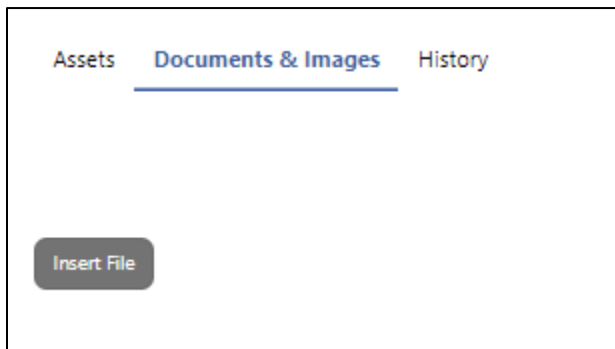
7. Complete the following fields:

Field	Action
Description	Enter a description of the item.
Class	Enter the item type and use the  next to the class field to see the options.
Department name	Enter the department name.
Condition	Enter the condition — good, fair or poor.
Quantity	Enter the quantity of the items being sent.
Unit of measure	The unit of measure prepopulates to each, but you may click the down arrow for other choices.

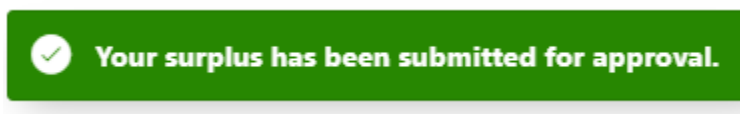
8. Click **Save and Done** if you only have one item to add. Click **Save and New** if you have other items to add, or click **Save and Same** if you have multiple items like the item just created.
9. Your item will now appear in the **Assets** section of the **Transfer** page.

It is highly recommended to add supporting documents. If you have documents or images to add to your request, click the down arrow next to **Documents and Images** and use the **Insert File** button.

Please be as descriptive as possible and include pictures, dimensions and weights to help Surplus Property coordinate pick-ups appropriately.



10. Click **Submit for Approval**. A success message will appear.



Note: There are two reasons why a tag number or property control number is not populating the asset in the Create an Asset field:

- Capital Asset Management did not transfer all the tag numbers or property control numbers into AssetWorks because some were too old.
- The tag number or property control number belongs to another cost center. If the asset belongs to another cost center, it will state it when trying to create an asset.

If an employee has multiple assets to transfer, they will need to create one asset at a time to be transferred. There is no way to do a mass transfer at once.

You must transfer property control numbers one at a time. However, non-property control numbers can be grouped. The asset size will determine if it can be grouped or entered as a one-line item. For example, you can combine office supplies like staplers and tape, but a lab freezer needs to stand alone.

Approve a transfer request

Overview

To complete the tasks demonstrated in this work instruction, you must have a role in Workday. In AssetWorks, Workday's nightly user and profile integration maintain cost center user profiles.

Approving a transfer request

Departmental AssetWorks users may need to request access as a cost center manager to approve transfer requests. Approvers will only access assets assigned to their approved Workday cost centers.

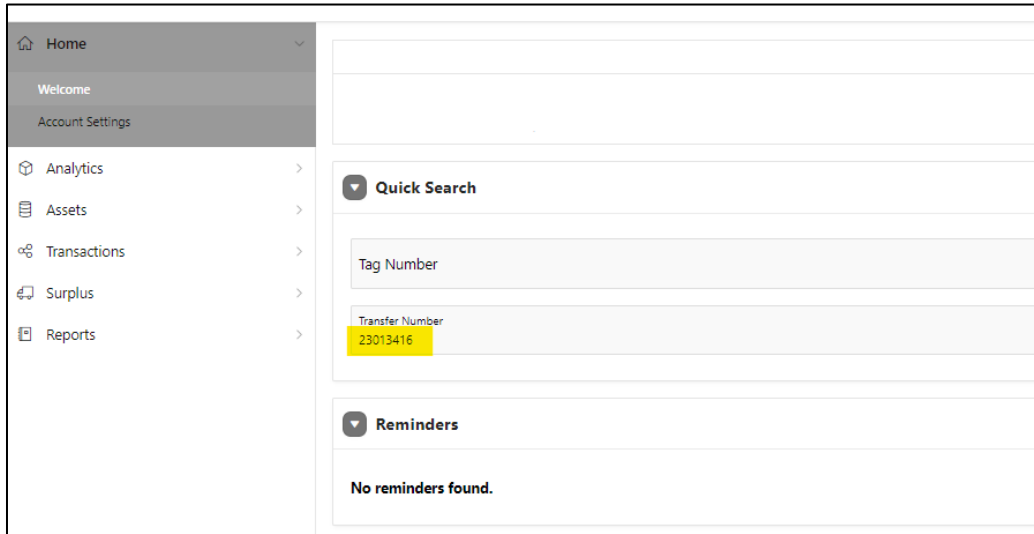
Departmental AssetWorks users will only have access to assets assigned to their approved Workday cost centers.

[Apply for a role via ServiceNow](#) using the Workday role provisioning process.

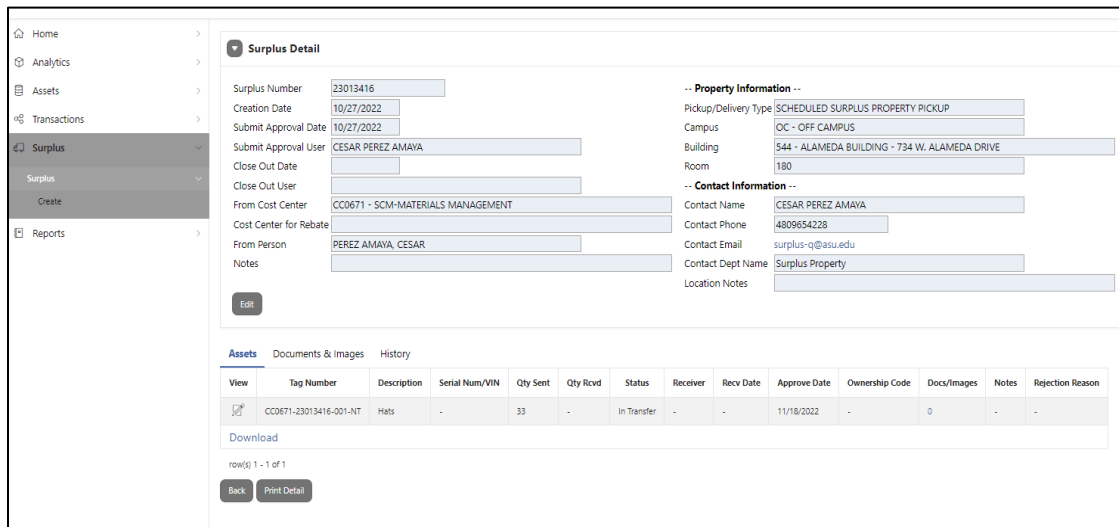
Use this process when you need to make an approval decision for an asset transfer. Note: To find your cost center approver, please contact your business operation manager or whoever handles financial decisions for your organization. The reason why the cost center approver is receiving email requests for approving a transfer request is that they get copied on everything about their cost center.

To approve a transfer request, please complete the following steps:

1. On the home tab, under **Quick Search**, you will see tag number and transfer number.
2. Enter the transfer number to be approved from the email you received in the **Transfer Number** field.



3. Click **Search**. The **Surplus Detail** screen will appear. The assets being transferred to Surplus Property are listed at the bottom of the page.



4. Click **Approve** to start the approval process. Some transfers will include multiple assets to be transferred. If there are multiple line items, you must approve or reject each line of assets.
5. If you choose to approve, click on the drop-down menu for the approved column and change it from **Pending** to **Approved**. You can then click on the blue arrow to change all the other statuses to **Approved**.

- If you reject one or more items, change the pending status to **Rejected** and enter a reason. The item or items will be rejected and returned to the requester, the other items will be approved, and the transfer request will be sent to Surplus Property.

ASU Arizona State University

Welcome: MAUREEN KING / ASU Home Help Support Sign Out

Home Assets Contacts **Transfers** Disposals Counter Sales POS Live Auction Approvals Users Admin Reports

Transfer Sidebar

- Surplus
- Transfer
- Internal Transfer
- Receive Assets
- Pickup Scheduler
- Work Order

Surplus Detail

Surplus Number: 20000492
 Creation Date: 12/06/2019
 Submit Approval Date: 12/06/2019
 Submit Approval User: MAUREEN KING
 Close Out Date:
 Close Out User:
 From Cost Center: 0000 - MATERIALS MANAGEMENT
 Cost Center for Rebate:
 From Person: KING, MAUREEN
 Notes:
-- Property Information --
 Pickup/Delivery Type: SCHEDULED SURPLUS PROPERTY PICKUP
 Campus: MC - TEMPE CAMPUS
 Building: 131 - MATERIAL SERVICES BLDG. - 1711 S. RURAL ROAD
 Room: 125
-- Contact Information --
 Contact Name: MAUREEN KING
 Contact Phone: (480) 965-9820
 Contact Email: DEACTIVATED_MAUREEN.KING@ASU.EDU
 Location Notes:
Approve Assets

Tag Number	Description	Qty Sent	Approved *	Notes	Rejection Reason
0000-20000492-001-NT	Chair	1	Pending		
0000-20000492-002-NT	table	2	Pending		
0000-20000492-003-NT	computer	1	Pending		

Cancel Save

- Click **Save** once you have changed all of the statuses from **Pending** to **Approved** or **Rejected**. The transfer request is sent to Surplus Property for processing.

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Surplus Detail

Surplus Number: 20000492
 Creation Date: 12/06/2019
 Submit Approval Date: 12/06/2019
 Submit Approval User: MAUREEN KING
 Close Out Date:
 Close Out User:
 From Cost Center: 0000 - MATERIALS MANAGEMENT
 Cost Center for Rebate:
 From Person: KING, MAUREEN
 Notes:
-- Property Information --
 Pickup/Delivery Type: SCHEDULED SURPLUS PROPERTY PICKUP
 Campus: MC - TEMPE CAMPUS
 Building: 131 - MATERIAL SERVICES BLDG. - 1711 S. RURAL ROAD
 Room: 125
-- Contact Information --
 Contact Name: MAUREEN KING
 Contact Phone: (480) 965-9820
 Contact Email: DEACTIVATED_MAUREEN.KING@ASU.EDU
 Location Notes:
Approve Assets

Tag Number	Description	Qty Sent	Approved *	Notes	Rejection Reason
0000-20000492-001-NT	Chair	1	Approved		
0000-20000492-002-NT	table	2	Approved		
0000-20000492-003-NT	computer	1	Rejected		This computer is needed still

Cancel Save

Locate a submitted transfer request

1. Click on the **Surplus** tab on the left side panel, the adhoc search will show all the transfers created thus far.

The screenshot displays the 'Adhoc Search Surplus Transfers' interface. On the left, a navigation menu includes Home, Analytics, Assets, Transactions, Surplus (selected), Create, and Reports. The main content area features search filters for 'Creation Start Date' (08/01/2022) and 'Creation End Date' (11/30/2022), a 'Submit' button, a search bar with a 'Go' button, and a dropdown menu set to '1. Primary Report'. Below these are two active filters: 'Close Out Date is null' and 'Received Date is null'. A table below shows the search results:

View/Edit	Surplus Transfer Number	Creation Date	From Cost Center	From Person	Method	Remarks	Tag Number
	23013416	10/27/2022	CC0671 - SCM-MATERIALS MANAGEMENT	CESAR PEREZ AMAYA	Surplus	OC - OFF CAMPUS	CC0671-23013416-001-NT

1 - 1 of 1