

Asset (Property) Transfer Request Form Approvals - FLUID

This document details the Transfer Request approvals process.

Abbreviations Defined:

AM - Asset Management

AMS - Asset Management Services (This is interchangeable with Asset Management Office or AM Office)

AO - Accountable Officer

AOD - Accountable Officer Designee

AO/D - Accountable Officer or Accountable Officer Designee

CF - Chart-Field, (CFs for plural)

DEPTID - Department ID

DSR - Department of Sponsored Research

FUND - Fund Code

NBV - Net Book Value

OPDP - Operating Unit and Department ID Combination. Used for search for AO/D

OU - Operating Unit

TRF DEPT - Transfer to New Department

TRF LOC - Transfer to New Location Only

UCO - University Controller' Office

When assets are no longer wanted or needed by a department a transfer request must be completed. Also, sometimes departments decide to move assets from one location to another but will remain the responsible party. The department is required to submit a request they are moving a capitalized asset to a new location.

These requests are only for use with certain capitalized assets. Information on how to determine if a certain asset is eligible please refer to the entry documentation. If the AO/D is approving requests the submitter should have taken due diligence to ensure the proper handling for the capitalized asset depending on the type it is. Split funded assets will still have to be processed through the manual paper form process. Changes to the paper form process have also been made. Departments must request prior approval from the AM Office and receive a pre-numbered form for one time use. Send the request to asset-help@usf.edu.

AO/Ds cannot be changed midstream. If an AO/D must be changed the request must be rejected and sent back to the beginning so the submitter may update the request.

AO/Ds cannot be the submitter and also the approver.

The next section details the approvals steps for the different types of transfer requests .

Approvals

The following details the steps in the approval process for Transfer Requests and when E-Mail notification is sent to a user to notify them to take action.

When a TRF DEPT is entered the following are the various steps in the approval process , please note where E-Mail notifications are sent:

Non-Project Related:

Pending - No E-Mail sent

Submitted - E-Mail Sent to Transfer From AO/D selected

From AO/D Approval - E-Mail Sent to Transfer To AO/D selected

To AO/D Approval - No E-Mail sent

AM Office Approval/Final Action - E-Mail sent to submitter to notify form is complete.

Project Related:

Pending - No E-Mail sent

Submitted - E-Mail Sent to Transfer From AO/D selected

From AO/D Approval - E-Mail Sent to Transfer To DSR Approver

DSR Approval - E-Mail Sent to Transfer To AO/D selected

To AO/D Approval - No E-Mail sent

AM Office Approval/Final Action - E-Mail sent to submitter to notify form is complete.

Should ANY level reject, an E-Mail is sent to the submitter notifying them the form was returned for revisions.

When a TRF LOC is entered the following are the various steps in the approval process , please note where E-Mail notifications are sent:

All types of Transfers to New Location Only

Pending - No E-Mail sent

Submitted - E-Mail Sent to Transfer From AO/D selected

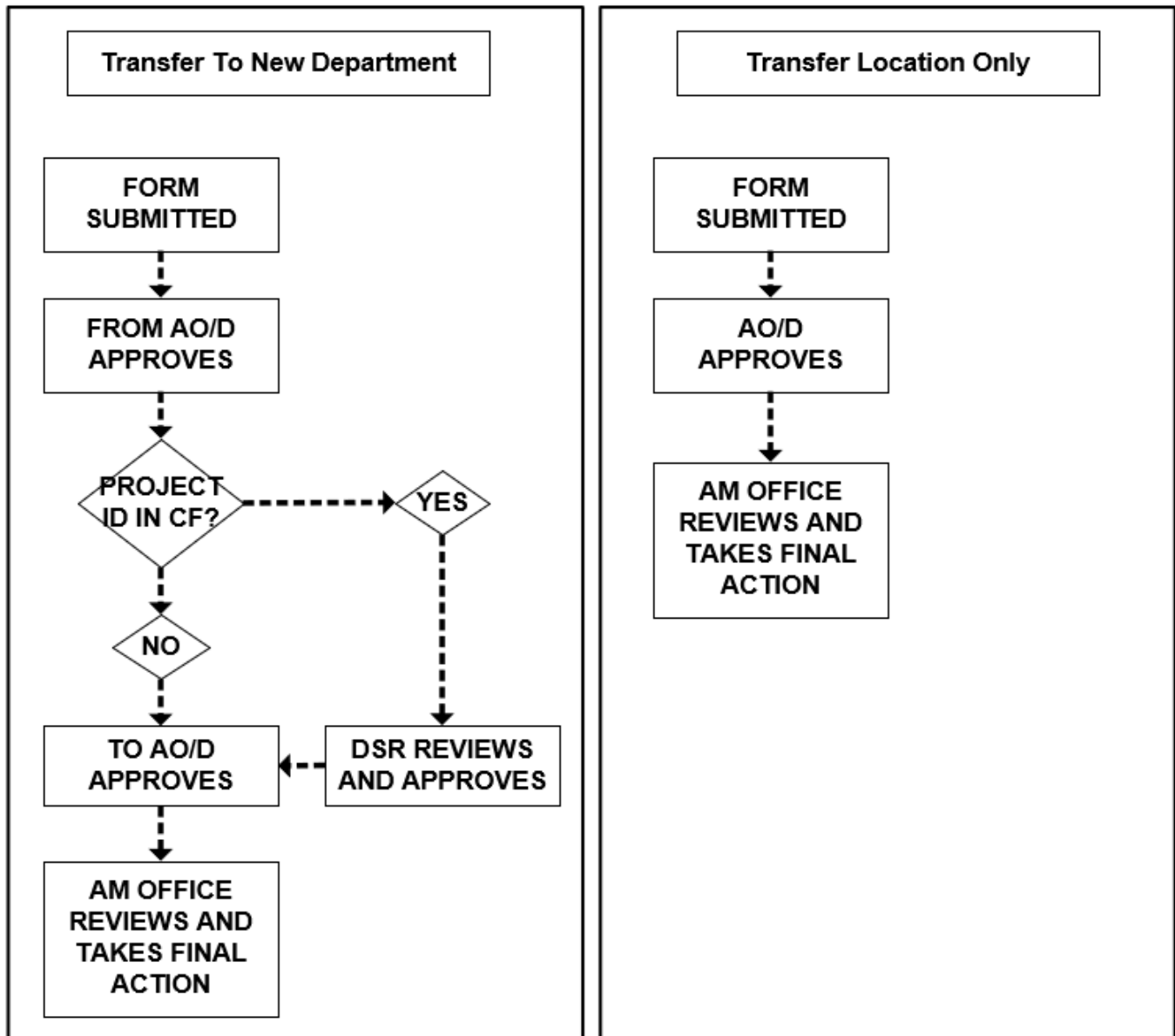
AO/D Approval - No E-Mail sent

AM Office Approval/Final Action - E-Mail sent to submitter to notify form is complete.

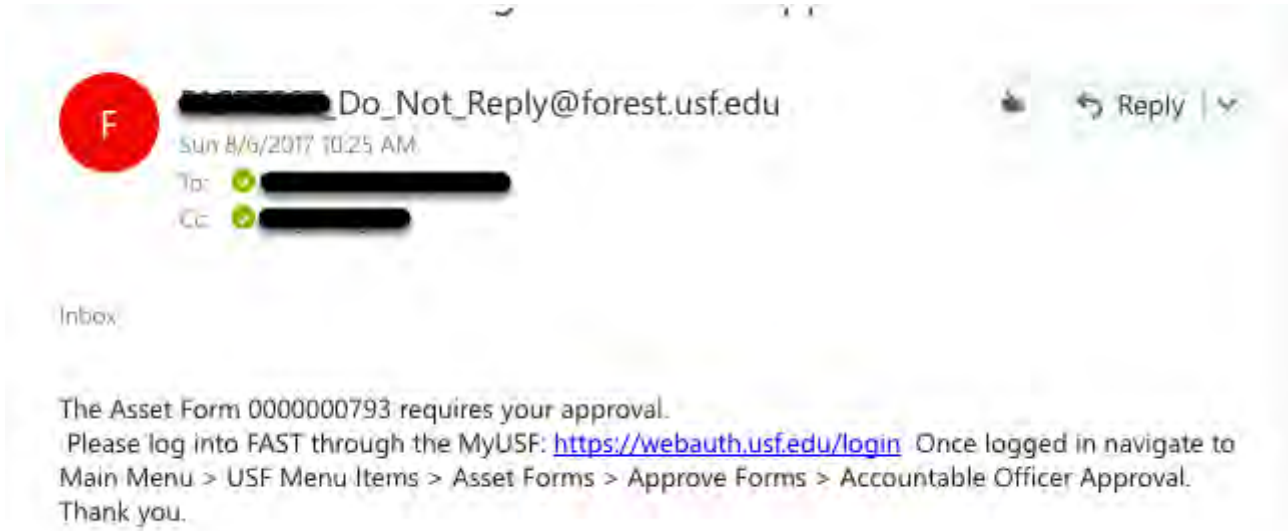
Should ANY level reject, an E-Mail is sent to the submitter notifying them the form was returned for revisions.

Approvals Diagram

The approvals flow for the two different types of request are shown below.

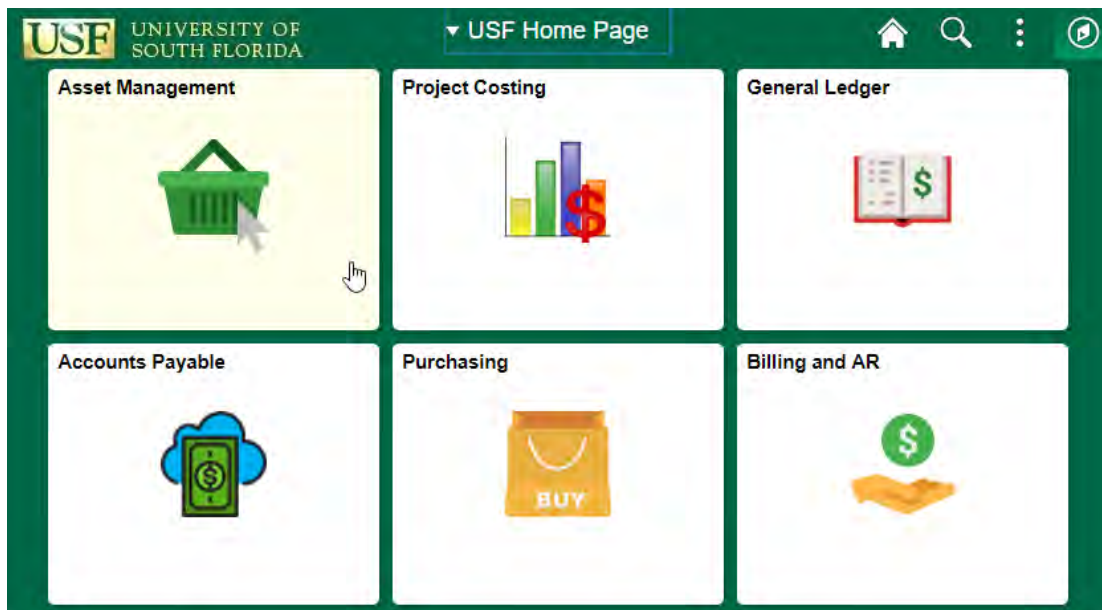


Approval Notification E-Mail

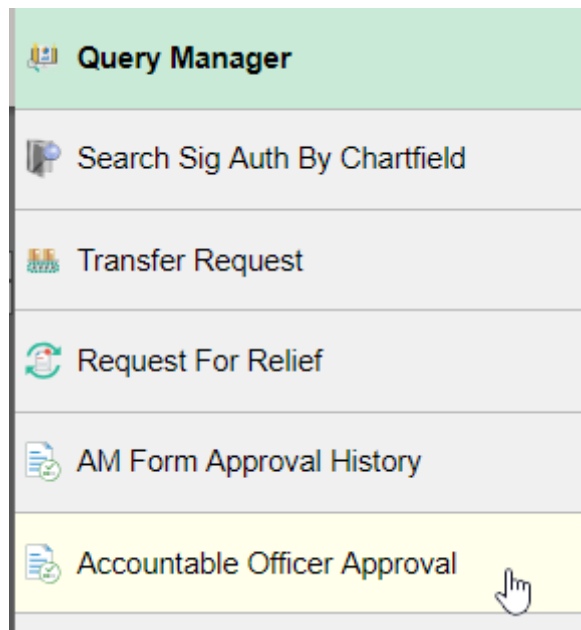


When there is an Asset form ready for an approval by the AO/D, an E-Mail is received by the AO/D to approve the form. The navigation is provided in the E-Mail.

Accountable Officer Approval



From the USF Home Page click on the Asset Management tile then Transfer & Relief Requests and finally Accountable Officer Approval in the left hand Nav Collection.



Accountable Officer Approval

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

Search Criteria

Search by: begins with

[Advanced Search](#)

When you arrive on the landing page you will notice your Empl ID is already entered for you. You can only approve those forms which are assigned to you.

Click Search and there will be two different possible results

Accountable Officer Approval

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

[Find an Existing Value](#)

Search Criteria

Search by: begins with

[Search](#) [Advanced Search](#)

Search Results

View All First 1-13 of 13 Last

Empl ID	AM Form Number	AM Form Type	Tag Number	AM Form Action	Last Update User ID	Last Update Date/Time
000000 [REDACTED]	0000000794	TRF	495000275181	Requires AO Approval	TSHAW	08/06/2017 11:26:36AM

If there are more than one form awaiting approval for the AO/D a list will appear of the forms available for approvals.

When the AO/D clicks on the link for the row of the form in a list of results it will take the AO/D to the beginning page of the AO approvals.

Accountable Officer Approval

Asset Management Form Approvals Page for
Accountable Officer

Asset Forms Requiring Approval Empl ID 000000 [REDACTED]

Empl ID	AM Form Type	AM Form Number	AM Form Action	Approve Form	Date/Time Stamp	Tag Number
1 000000 [REDACTED]	TRF	0000000794	Requires AO Approval	Approve Form	08/06/2017 11:26:36AM	495000275181

If there is only one form the AO/D is automatically navigated to the beginning page of the AO Approvals process.

In the screen shot below the beginning page provides the AM Form Type, AM Form Number, AM Form Action expected, submission Date/Time Stamp, and finally the Tag Number.

There are also buttons to move to other forms in your list (if there are any) or if you wish you can return to the search page to view the information there.

Clicking on the Approve Form for the row will take the AO/D to the form to review and then for approving or rejecting the form.

The next section explains the form in detail.

The Form Explained

1 REQUEST NUMBER TRF 0000000794 Tag Number 495000275181 Status Submitted

TRANSFER OF PROPERTY BETWEEN LOCATIONS AND/OR CHARTFIELDS

Please contact Asset Management Services with any questions. [View Comments](#)

3 **Transfer Type**

2 If Location Only change, check the appropriate button below.

Transfer to New Department Transfer to New Location Only

4 **TRANSFER FROM** Dept 125300 **A** **TRANSFER FROM CF** **B**

Department PHYSICS
 Name Woods,Lilia M
 Phone 813/974-7351
 Email THERBY@USF.EDU
 Campus Address [REDACTED]

Operating Unit TPA
 Fund Code 10000
 Department 125300
 Product CAS016
 Initiative 0102593
 Project

ASSET INFORMATION

5 **A** Tag Number 495000275181 Asset ID 000000320534 **B**

Description 36"X72"X1 OPTICAL TABLE Model CLEANTOP II

Manufacturer TMC Serial ID NONE

Location ISA4045 Acquisition Date 11/26/2014

Cost 8458.49 Net Book Value 6030.59

TRANSFER TO

Department 390500 **6** Department Name Sch of Global Sustainability

Receiver Name Boyd,Shirley

Email ID [REDACTED]@USF.EDU Phone 813/974-8367

7 **TRANSFER TO CF** Asset Location ACB0460 [REDACTED]

Operating Unit	Fund Code	Dept	Product	Initiative	Project ID
TPA	10000	390500	000000	0000000	

[Return to Approval List](#)

Comments **8**

[Approve](#) [Reject](#)

You are presented with the Property Transfer Form.

The following is seen on the page:

1. Request Number TRF ##### - The ##### will be represented by a 10 digit sequentially assigned number for asset form requests.

Tag Number - This is the Tag Number of the Asset this request was submitted for.

Status - This is the status the form is in.

2. Transfer Type - This is the type of transfer requested. "Transfer to New Department" or "Transfer to New Location Only". The page will render differently for the two different types of transfers. The image below is of a TRF DEPT. If this was a TRF LOC the only information available in the Transfer To section would be the location code it is being transferred to. There would be no receiving AO/D information as there is no receiving AO/D since only the location is changing.

3. View Comments - Clicking this link will take you to the AM Form Approval History page to view the approval history and any comments for the request. (Explained in greater detail in the AM Form Approval History section)

4. Transfer From information - This section contains information in regards to the CF and approvals for the transferring from department.

A. Dept - This is the current Department ID for the Asset

Department - This is the name of the Department

Name - This is the AO/D selected to approve the transfer from the department.

Phone - The phone number for the AO/D selected

E-Mail - The E-Mail address for the AO/D is selected

B. Contains the current CF information for the asset.

5. Asset Information - This is the information about the asset itself

A. Tag Number - The Tag Number of the Asset

Description - The Description of the Asset as it is in the system

Manufacturer - The Manufacturer of the Asset

Location - The last known location of the Asset either through inventory or other means.

Cost - The historical cost of the asset

B. Asset ID - This is the sequential auto assigned Asset Identification Number used by Fast!

Model - This is the Model of the Asset

Serial ID - This is the Serial ID (May be Blank or say 'NONE' if there is not one.)

Acquisition Date - The Date the Asset was acquired

Net Book Value - This is the current NBV good as of the last day of the previous month and should match what is shown in the U_ASSETS_BY_MY_DEPARTMENT query.

6. Transfer To- This is the information pertaining to who and where the asset is being transferred to.

Department - The department ID for the CF the asset is being transferred to.

Department Name - The name of the department being transferred to.

Receiver Name - This is the Receiving AO/D who will approve the receipt of the asset.

E-Mail ID - Appears when the AO/D is selected

Phone - Appears when the AO/D is selected

7. Asset Location - The Asset Location where the asset is being transferred to.

Operating Unit - The OU the asset is being transferred to.

Fund Code - The Fund Code the asset is being transferred to.

Dept - The department ID for the CF the asset is being transferred to.

Product - The Product the asset is being transferred to.

Initiative - The Initiative the asset is being transferred to.

Project ID -The Project ID the asset is being transferred to. This is only required if it's being transferred to a new project ID, if not it may be left blank.

8. Various buttons.

Return to Approval List - Returns you to the Approval List

Comments - 50 Characters or less in length.

Reject - Used to Reject the transaction and send it back to the submitter. You MUST enter a 50 character or less comment in the comments field if you are rejecting the transaction.

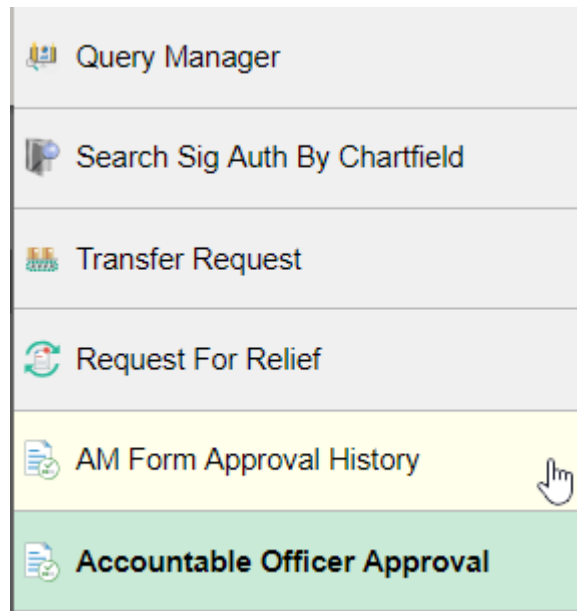
Approve - Used to Approve the transaction and to move on to the next approval level.

AO/D have two possible actions to take with the form, Approval or Rejecting the form.

Approval: If the transfer request is acceptable, the AO/D can click the Approve button and the form will be sent on to the next steps for approval. The AO/D if they wish can add a comment in the field before approving. However, this is not a requirement for approval.

Rejection: Before clicking the Reject Button enter a comment in the field provided. The comment is limited to 50 characters. This should be in regards to why the AO/D is rejecting the request.

AM Form Approval History



AM Form Approval History

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

Search Criteria

Search by: AM Form Number

- AM Form Type
- Tag Number

[Advanced Search](#)

The AM Form Approval History page shows the Approval History for the form number provided in the search. You may also search by tag number. Not only does this screen provide you with the approvals but also, any comments which were added in any of the approvals.

Users can either navigate to the page and look the approval history of forms by the form number or the tag number for the asset. OR
 User can view this page from the Form's screen whether in the review of an existing form or from within the approvals screen when working on approvals.

To Navigate to the page: USF Home Page>USF Asset Management Home Page>USF Asset Requests>AM Form Approval History.

If you are reviewing an existing form which has at least been saved and a number generated, clicking on the View Comments Link on the form itself will take you to the below.

AM Form Approval History

Request Number TRF 0000000713

Tag Number 495000275498 **Asset Identification** 000000321214

Personalize Find View All [Print] [Refresh]			
User ID	Date/Time Stamp	Form Status	Asset Comments
1 TSHAW	07/25/17 10:13:18AM	Pending	
2 TSHAW	07/25/17 10:14:05AM	Submitted	
3 LGWOODS	07/25/17 10:22:57AM	AO Approval Completed	
4 KANDERSON	07/25/17 10:24:29AM	Grant - Research Approved	
5 SBOYD	07/25/17 10:27:11AM	Receiving AO Approved	
6 IWIGGINS	07/25/17 10:30:25AM	Final - Approved	

First 1-6 of 6 Last

Return to Search Previous in List Next in List

The listing provides the User ID, Date/Time Stamp and what the status was as of the Date Time Stamp. Also, any asset comments entered are provided to the right.





The below shows a form which went through the approvals process and was finalized by the AM Office. Once finalized by the AM Office the form may not be updated.

AM Form Approval History

Request Number TRF 0000000724

Tag Number 495000275498

Asset Identification 000000321214

Personalize Find View All  			
First  1-4 of 4  Last			
User ID	Date/Time Stamp	Form Status	Asset Comments
1 TSHAW	07/25/17 11:31:52AM	Pending	
2 TSHAW	07/25/17 11:32:31AM	Submitted	
3 LGWOODS	07/25/17 11:43:39AM	AO Approval Completed	
4 KANDERSON	07/25/17 11:50:55AM	REJECTED, Requires Form Update	NOT APPROVED FOR REMOVAL FROM PROJECT

The below shows a transfer request which was rejected by DSR. Notice the comments to the right of the rejection.

This form should be available in the Transfer Request Find an Existing Value screen. If updates are needed the user can update the page as necessary since it is in a pending status.