

Asset (Property) Transfer Request Form Entry - FLUID

Overview

This document details how to:

1. Enter a request to transfer an asset from one department to another.
2. Enter a request to transfer an asset from one location to another when the asset remains with the department.
3. Reviewing the status of an existing request and rejection handling.

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/Routing Name - 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

The email address asset-help@usf.edu has been set up for you to use to request assistance. Please be as detailed as possible when submitting an inquiry to the help address.

Transferring an Asset to a new department

Sometimes a department no longer wants/needs a certain asset. This could be because a replacement was purchased or the asset may no longer be needed for the department to function. When the unwanted asset is advertised on property@listserv.usf.edu for adoption

sometimes a department is in need of the asset and they will ask to have it transferred to their department. For a transfer to be successful information is required to create a transfer request form.

Sometimes departments need to move capitalized assets to a new location. The department is required to notify the AM Office of this movement. For Transfers to New Location Only, please refer to the section for those types of requests.

Information required before entry of a New Department transfer request.

1. The Tag Number - This is located on the asset being transferred and begins with the numbers 495000.
2. The AO/AOD for the CF associated with the asset who will be responsible for approving the transfer from this CF. This will be discussed further in the steps to enter.
3. The CF the asset will be transferred to which is provided by the receiver of the asset(s).
4. The location the asset will be moved to when transferred to the new department.
5. The AO/D for the CF the asset will be transferred to who will be responsible for approving the transfer to the new department.

Four caveats before we go on:

1. Should an asset have a sponsored research project ID associated with it, DSR must approve the transfer. The asset should not be transferred to the new department until AFTER DSR has given approval to do so. You may want to seek pre-approval before advertising to avoid filling out a form only to have it rejected by DSR. Forewarning, if the project is still active the request will most likely be denied.

2. The person submitting the form may not also approve the form. For example, AO/AOD John Doe has an asset to submit a transfer request for. John Doe wants to approve. John Doe must get someone else to submit the request to him. John Doe asks Sally Smith to enter the Transfer Request and assign to him as the AO/AOD for the approval for the transfer from CFs (the current CFs associated with the asset.) If John Doe is unable to get anyone to submit, John will need to assign the form to one of the other AO/D for the CF combination to approve the form.

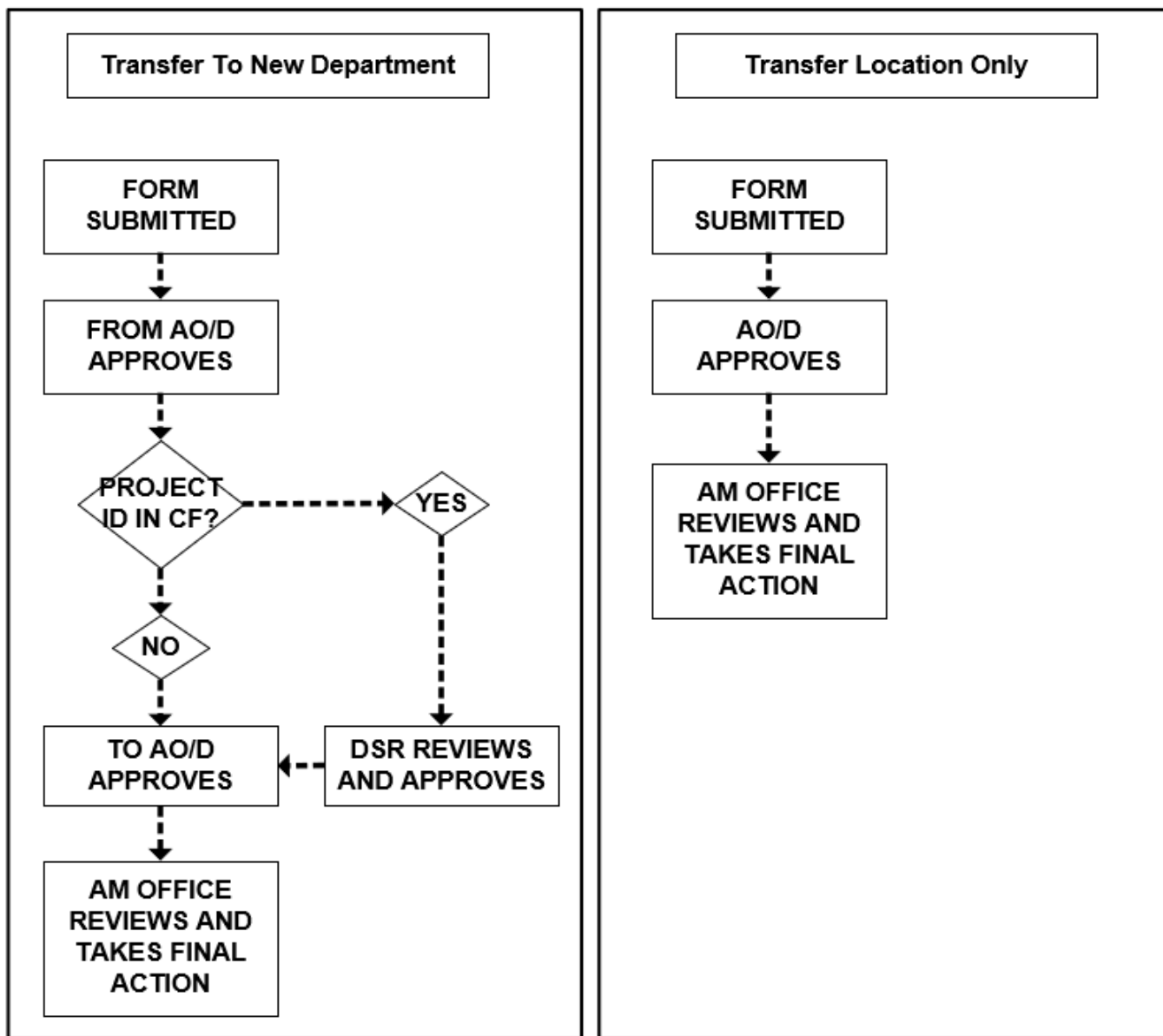
3. Changing AO/Ds midstream is not possible. If an AO/D needs to be changed the form MUST be rejected back to pending, updated and re-submitted with the updated AO/D.

4. Only assets which are eligible for this process may be used. Please pay close attention to

instructions below which detail what to do should you have an asset which is not eligible for the process. Failure to follow procedures/policy will cause delays and additional work on both the part of the Department and the AM Office.

Approvals Diagram

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

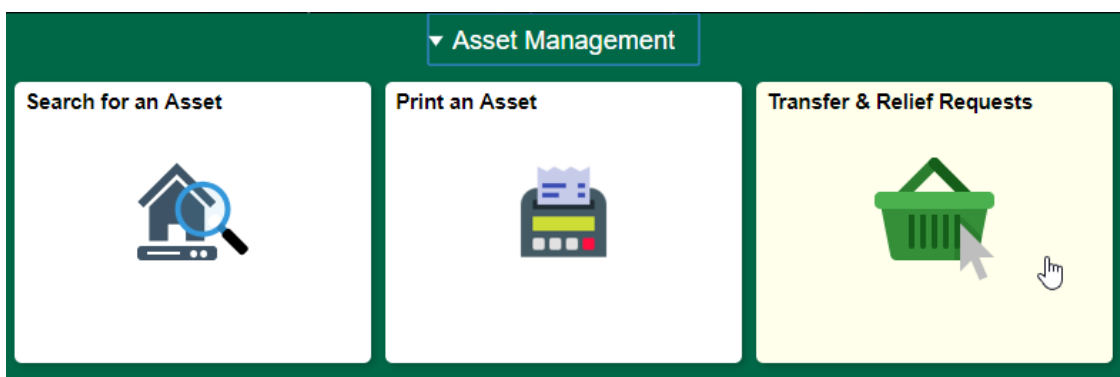


Asset Eligibility and Determining Accountable Officers and Accountable Officer Designees



Before entering the form, you should validate the asset is first eligible for the electronic transfer request form. You also need to validate the CF information and use this to get a valid listing of AO/D for the OPDP/Routing Name CF combination.

From the USF Home Page click on the Asset Management tile



Next click on Transfer & Relief Requests

Query Manager

- Search Sig Auth By Chartfield
- Transfer Request
- Request For Relief
- AM Form Approval History
- Accountable Officer Approval

Query Manager

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

[Find an Existing Query](#) | [Create New Query](#)

*Search By Query Name begins with

Search [Advanced Search](#)

You should automatically land on the Query Manager page

Query Viewer

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

*Search By Query Name begins with U_ASSETS_BY_MY_DEPARTMENT

Search [Advanced Search](#)

Search Results

*Folder View -- All Folders --

Query				Personalize Find View All	First	1 of 1	Last		
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
U_ASSETS_BY_MY_DEPARTMENT		Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

Search for the public query named "U_ASSETS_BY_MY_DEPARTMENT"

Click on HTML in the Run to HTML

U_ASSETS_BY_MY_DEPARTMENT

Department ID Like %

OR Tag Number Like %

ASSET ID	TAG NUMBER	ASSET STATUS	ASSET TAGGABLE ?	ASSET DESCRIPTION	MANUFACTURER	MODEL	SERIAL ID	IN SERVICE DATE	ACQUISITION DATE	END DEPRECIATION DATE	CF SEQ NO	OPERATING UNIT	FUND	ACCOUNT	DEPARTMENT ID	PRODUCT	INITIATIVE	PROJECT ID	LOCATION
----------	------------	--------------	------------------	-------------------	--------------	-------	-----------	-----------------	------------------	-----------------------	-----------	----------------	------	---------	---------------	---------	------------	------------	----------

In the screen presented to you enter the Tag Number from the Asset and click View Results.

*NOTE - Not all fields are displayed in the images for the query. This is done because the images are too wide for the document. Those shown are pertinent for completion of a transfer request.

U_ASSETS_BY_MY_DEPARTMENT

Department ID Like %

OR Tag Number Like %

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(2 kb\)](#)

[View All](#)

ASSET ID	TAG NUMBER	ASSET STATUS	ASSET TAGGABLE ?	ASSET DESCRIPTION	MANUFACTURER	MODEL	SERIAL ID	IN SERVICE DATE	ACQUISITION DATE	END DEPRECIATION DATE	CF SEQ NO	OPERATING UNIT	FUND	ACCOUNT	DEPARTMENT ID	PRODUCT	INITIATIVE	PROJECT ID	LOCATION
1	000000248276	In Service	Y	UPGRADE FOR D8 FOCUS SYSTEM SE				12/21/2009	12/21/2009	11/30/2018	0	TPA	20000	18520	125300	000000	0000000	1253103100	ISA1058
2	00000248276	In Service	Y	UPGRADE FOR D8 FOCUS SYSTEM SE				12/21/2009	12/21/2009	11/30/2018	1	TPA	18300	18520	125300	000000	DEPTMNT		ISA1058

This first example is for assets which are NOT eligible for this process. These should be few in number and are most likely a research related asset. Assets which have more than 1 row of results are ineligible for this process. For these types of assets, you MUST contact the AM Office and at asset-help@usf.edu to request a one-time use form. You will be provided with a unique numbered paper form to request a transfer for a split funded Asset. Each distinct CF requires a separate form for transfer.

Departments are ENCOURAGED to request asset consolidation from one CF to a single CF. This helps out everyone involved in the process from the department to central AM to reporting.

U_ASSETS_BY_MY_DEPARTMENT

Department ID Like %

OR Tag Number Like %

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

[View All](#)

Used to Determine AO/AOD

ASSET ID	TAG NUMBER	ASSET STATUS	ASSET TAGGABLE ?	ASSET DESCRIPTION	MANUFACTURER	MODEL	SERIAL ID	IN SERVICE DATE	ACQUISITION DATE	END DEPRECIATION DATE	CF SEQ NO	OPERATING UNIT	FUND	ACCOUNT	DEPARTMENT ID	PRODUCT	INITIATIVE	PROJECT ID	LOCATION
1 000000320534	495000275181	In Service	Y	36"X72"X1 OPTICAL TABLE	TMC	CLEANTOP II	NONE	11/26/2014	11/26/2014	10/31/2023	0	TPA	10000	18520	125300	CAS016	0102593		ISA4045

Below are the results for an asset which is eligible for use with this process.

First notice there is only 1 row of results.

Second take note of the Operating Unit and Department ID. This is the OPDP/Routing Name used for searching or the AO/D for the transfer from AO/D.

U_ASSETS_BY_MY_DEPARTMENT

Department ID Like %

OR Tag Number Like %

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

[View All](#)

ASSET ID	TAG NUMBER	ASSET STATUS	ASSET TAGGABLE ?	ASSET DESCRIPTION	MANUFACTURER	MODEL	SERIAL ID	IN SERVICE DATE	ACQUISITION DATE	END DEPRECIATION DATE	CF SEQ NO	OPERATING UNIT	FUND	ACCOUNT	DEPARTMENT ID
1 000000320534	495000275181	In Service	Y	36"X72"X1 OPTICAL TABLE	TMC	CLEANTOP II	NONE	11/26/2014	11/26/2014	10/31/2023	0	TPA	10000	18520	125300

Remember you can always search using a wild card to limit the amount of data entry needed to run the query. Simply enter the last 6 digits of the tag number preceded by a percent (%) sign and click View Results. This will also provide you with results for this asset.

Validate you have the correct asset information. Validate the asset description matches what you are attempting to transfer. If there is a difference, check the tag number entered. If there are still issues please contact the AM Office.

U_ASSETS_BY_MY_DEPARTMENT

Department ID Like %

OR Tag Number Like %

[View Results](#)

No matching values were found.

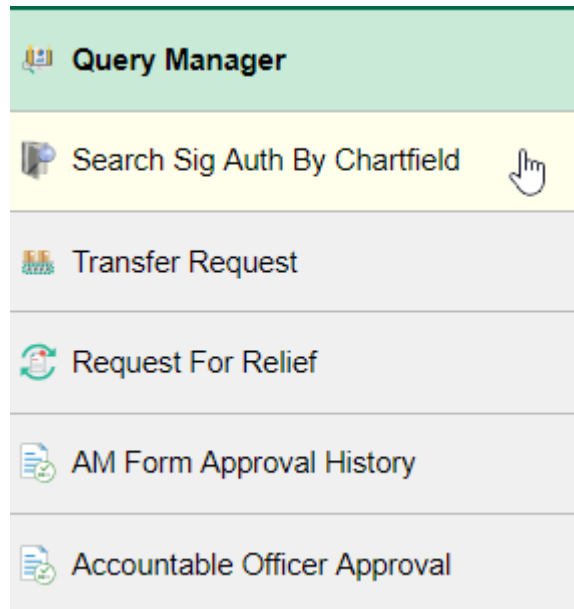
ASSET ID	TAG NUMBER	ASSET STATUS	ASSET TAGGABLE ?	ASSET DESCRIPTION	MANUFACTURER	MODEL	SERIAL ID	IN SERVICE DATE	ACQUISITION DATE	END DEPRECIATION DATE	CF SEQ NO	OPERATING UNIT	FUND ACCOUNT	DEPARTMENT ID	PRODUCT	INITIATIVE	PROJECT ID	LOCATION
----------	------------	--------------	------------------	-------------------	--------------	-------	-----------	-----------------	------------------	-----------------------	-----------	----------------	--------------	---------------	---------	------------	------------	----------

Should you run the query and receive no results the asset may no longer be tracked due to a capitalization threshold change.

Also, check to ensure you entered the correct tag number.

If you believe you these results are in error and the asset should be in the system please contact the Asset Manager to inquire in regards to the tag number.

Searching for the AO/D



Next, click on Search Sig Auth By Chartfield in the Nav Collection on the left.

Sig Auth - Search by Chartfld

Search Criteria

Project

Initiative

Fund Code

Operating Unit and Deptid TPA125300

Search

Reset Criteria

Signature Authorization Inquiry Results

Personalize | Find | View All | First 1 of 1 Last

Signature Authorization Details

Routing Name	Role Name	User ID	Empl ID	Name	Telephone	Mail Drop	Email Address
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Next enter the OPDP/Routing Name values from the query results into the field Operating Unit and Deptid

Click Search

Sig Auth - Search by Chartfld

Search Criteria

Project

Initiative

Fund Code

Operating Unit and Deptid TPA125300

Search

Reset Criteria

Signature Authorization Inquiry Results

Personalize | Find | View All | First 1-16 of 20 Last

Signature Authorization Details

Routing Name	Role Name	User ID	Empl ID	Name	Telephone	Mail Drop	Email Address
TPA125300	Accountable Officer Designee	DEJOHNSO	00000021143	Johnson,Dale E	813/974-5125	PHY114	dalejohnson@usf.edu
TPA125300	Req_Manager	DESAI	00000024344	Desai,Nita C	813/974-9575	CPR107	desai@usf.edu
TPA125300	Req_Approver	DESAI	00000024344	Desai,Nita C	813/974-9575	CPR107	desai@usf.edu
TPA125300	Accountable Officer	DRABSON	00000011274	Rabson,David A	813/974-5230	CMC114	rabson@usf.edu
TPA125300	Purchasing Supervisor	GCOTTER	00000070571	Cotter III,George L	813/974-3340	SVC 1073	gcotter@usf.edu
TPA125300	President	GCOTTER	00000070571	Cotter III,George L	813/974-3340	SVC 1073	gcotter@usf.edu
TPA125300	Accountable Officer	LWOODS	00000049284	Woods,Lisa M	813/974-7251	ISA 2010	lwoods@usf.edu

A listing of eligible types of signature authorizations should appear. Click on the Role Name header to sort by Role Name.

Sig Auth - Search by Chartfld

▼ Search Criteria

Project

Initiative

Fund Code

Operating Unit and Deptid

Signature Authorization Inquiry Results

Personalize | Find | View All | | First 1-16 of 20 Last

Signature Authorization Details

Routing Name	Role Name	User ID	Empl ID	Name	Telephone	Mail Drop	Email Address
TPA125300	Accountable Officer	DRABSON	00000011274	Rabson,David A	813/974-5230	CMC114	rabson@usf.edu
TPA125300	Accountable Officer Designee	LGWOODS	00000048284	Woods,Lilia M	813/974-7351	ISA 2019	lmwoods@usf.edu
TPA125300	Accountable Officer Designee	U47720220	00000109485	Luna,Flora R	813/974-7284	ISA 2019	fluna@usf.edu
TPA125300	Accountable Officer Designee	DEJOHNSO	00000021143	Johnson,Dale E	813/974-5125	PHY114	dalejohnson@usf.edu
TPA125300	President	GCOTTER	00000070571	Cotter III,George L	813/974-3340	SVC 1073	gcotter@usf.edu
TPA125300	President	U73084461	00000127000	Mays Jr,Timothy Crandall	813/974-3960	SVC 1072	timothy45@usf.edu
TPA125300	Purchasing Agent	PACLEVELAND	00000099411	Cleveland,Paul Allan	813/974-2486	SVC1073	pacleveland@usf.edu

The results provide those individuals who are eligible to approve the request. Validate the individual for whom you will be entering the request exists in the listing. If they do not appear they will not be able to approve this transfer and an alternate will need to be chosen from the list. Only Accountable Officers and Accountable Officer Designees are eligible for approval of these requests.

Sig Auth - Search by Chartfld

Search Criteria

Project

Initiative

Fund Code

Operating Unit and Deptid

Search

Reset Criteria

Signature Authorization Inquiry Results

Personalize | Find | View 16 | First 1-24 of 24 Last

Signature Authorization Details

Routing Name	Role Name	User ID	Empl ID	Name	Telephone	Mail Drop	Email Address
TPA390500	Accountable Officer	TOSO	00000021493	Toso, Kevin H	813/974-5561	SVC 1088	ktoso@usf.edu
TPA390500	Accountable Officer Designee	U42823404	00000032618	Leon, Marilyn M	813/974-5399	CGS 101	mleon@mail.usf.edu
TPA390500	Accountable Officer Designee	U77143810	00000080275	Gaskell, Kelly Mercedes	813/974-6906	CGS 101	KGASKELL@USF.EDU
TPA390500	Accountable Officer Designee	BOWENMV	00000046170	Bowen, Vire Marie	813/974-8329	PSB 101	mbowen1@usf.edu
TPA390500	Accountable Officer Designee	SBOYD	00000040721	Boyd, Shirley A.	813/974-8367	CGS 101	sboyd@usf.edu
TPA390500	Accountable Officer Designee	RWILCOX	00000043696	Wilcox, Ralph C	813/974-8347	CGS401	rcwilcox@usf.edu
TPA390500	President	GCOTTER	00000070571	Cotter III, George L	813/974-3340	SVC 1073	gcotter@usf.edu

As mentioned earlier, when entering a transfer request certain information will be provided by the transfer to office. You should validate the information provided before entering the request. From the CF provided to transfer to, look up in the Search Sig Auth By Chart-field screen to validate the individual advised to place as the receiving AO/D approver is in the list. If the individual does not exist in the list, the receiving department will need to provide a different AO/D to enter as the approver.

The Form Explained

Property Transfer

1 Request Number TRF NEXT Tag Number 495000275181 Status Pending
TRANSFER OF PROPERTY BETWEEN LOCATIONS AND/OR CHARTFIELDS

Please contact Asset Management Services with questions

2 **Transfer Type**
If Location Only change, check the appropriate button below.
 Transfer to New Department Transfer to New Location Only

3 Comments: View Comments

4 **TRANSFER FROM INFORMATION**

A	Dept 125300 Department PHYSICS AO/Designee <input type="text"/> Phone Email Contact Name Shaw, Noeella T Contact Email [REDACTED]@USF.EDU	B	Operating Unit TPA Fund Code 10000 Department 125300 Product CAS016 Initiative 0102593 Project Contact Phone 813/974-[REDACTED]
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5 **ASSET INFORMATION**

A	Tag Number 495000275181 Description 36"X72"X1 OPTICAL TABLE Manufacturer TMC Location ISA4045 Cost 8458.49	B	Asset ID 00000320534 Model CLEAN TOP II Serial ID NONE Acquisition Date 11/26/2014 Net Book Value 6030.59
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6 **TRANSFER TO INFORMATION**

Asset Location

Dept ID

Department

Operating Unit	Dept	Fund Code	Product	Initiative	Project ID
<input type="text"/> <input type="button" value="Search"/>	<input type="text"/>	<input type="text"/> <input type="button" value="Search"/>	<input type="text"/> <input type="button" value="Search"/>	<input type="text"/> <input type="button" value="Search"/>	<input type="text"/> <input type="button" value="Search"/>

Receiving AO/Designee

Email ID Phone

7

You are presented with the Property Transfer Form.

The following is seen on the page:

1. Request Number TRF NEXT - The NEXT will change to an actual number when the form is eligible for saving.

Tag Number - This is the Tag Number of the Asset you are submitting a transfer request for

Status - This is the status the form is in. Different statuses are explained in greater detail in the section "Viewing an Existing Transfer Request"

2. Transfer Type - This is the type of transfer you are requesting. Choose between the "Transfer to New Department" or "Transfer to New Location Only". For the TRF LOC please see the section "Entering a Transfer to New Location Only Request".

3. Comments - Comments may be entered here for the approvers to see. However, this is not required and will also be overwritten should a form be rejected.

View Comments - This link shows comments entered for an existing form. Since there are no comments at the beginning this link does nothing. You can ignore this link for entry.

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

AO/Designee - This is where the transferring AO/D will be entered

Phone - Appears when the AO/D is selected

E-mail - Appears when the AO/D is selected

Contact Name - This is the person entering the form

Contact E-mail - This is the E-mail of the person entering the form

B. Operating Unit - This is the CURRENT Operating Unit for the Asset

Fund Code - This is the Fund Code for the Asset

Department - This is the Department ID for the Asset

Product - This is the Product or the Asset

Initiative - This is the Initiative for the Asset

Project - This is the Project ID for the Asset

Contact Phone - This is the phone number of the person entering the form.

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 was shown in the U_ASSETS_BY_MY_DEPARTMENT query results.

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

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

Dept ID - The department ID for the CF 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.

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.

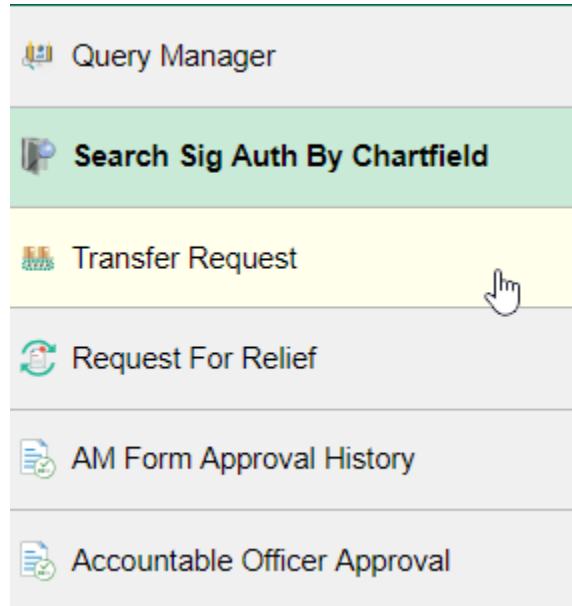
Receiving AO/Designee - This is the Receiving AO/D who will approve the receipt of the asset.

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

Phone - Appears when the AO/D is selected

7. Various buttons.

Entering a New Transfer Request



Click on Transfer Request in the Nav Collection on the left.

Property Transfer

Business Unit

AM Form Number

AM Form Type

Tag Number

[Find an Existing Value](#) | [Add a New Value](#)

Property Transfer

[Find an Existing Value](#)

[Add a New Value](#)

Business Unit

AM Form Number

AM Form Type

Tag Number 

[Find an Existing Value](#) | [Add a New Value](#)

Enter the Tag Number of the asset you want to enter a transfer request for.

Property Transfer


Find an Existing Value

Add a New Value

Business Unit

AM Form Number

AM Form Type

Tag Number 

Add

Find an Existing Value | Add a New Value

Look Up Tag Number

[Help](#)

Tag Number

Asset Identification

Description

[Basic Lookup](#)

Search Results

View 100 First 1 of 1 Last

Tag Number	Asset Identification	Description
495000275181	000000320534	36"X72"X1 OPTICAL TABLE

Alternately you can do a search by clicking on the look up magnifying glass. Wild cards will work in the Look Up but they will NOT work in the entry field.

Once the tag number is entered click the Add button.

Property Transfer

Request Number TRF NEXT Tag Number 495000275181 Status Pending

TRANSFER OF PROPERTY BETWEEN LOCATIONS AND/OR CHARTFIELDS

Please contact Asset Management Services with questions

Transfer Type

If Location Only change, check the appropriate button below.

Transfer to New Department Transfer to New Location Only

Comments: [View Comments](#)

TRANSFER FROM INFORMATION

Dept 125300 Operating Unit TPA
Department PHYSICS Fund Code 10000
AO/Designee Department 125300
Phone Product CAS016
Email Initiative 0102593
Project
Contact Name Shaw, Noeella T
Contact Email @USF.EDU Contact Phone 813/974-

ASSET INFORMATION

Tag Number 495000275181 Asset ID 000000320534
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 INFORMATION

Asset Location Dept ID
Department
Operating Unit Dept Fund Code Product Initiative Project ID

Receiving AO/Designee
Email ID Phone

Validate the asset information for the asset being transferred is displayed. If something doesn't match, check your tag number. If you entered an incorrect tag number click the Add button at the bottom of the screen to return to the add page to enter the correct tag number.

Property Transfer

Request Number TRF NEXT **Tag Number** 495000275181 **Status** Pending

TRANSFER OF PROPERTY BETWEEN LOCATIONS AND/OR CHARTFIELDS

Please contact Asset Management Services with questions

Transfer Type

If Location Only change, check the appropriate button below.

Transfer to New Department

Transfer to New Location Only

Comments:

[View Comments](#)

TRANSFER FROM INFORMATION

Dept 125300

Operating Unit TPA

Department PHYSICS

Fund Code 10000

AO/Designee

Department 125300

Phone

Product CAS016

Email

Initiative 0102593

Project

Contact Name Shaw, Noelella T

Contact Email [REDACTED]@USF.EDU

Contact Phone 813/974-[REDACTED]

Using the magnifying glass Look up the AO/D for the transferring CF.

Look Up AO/Designee x

[Help](#)

Name x

Routing Name

[Basic Lookup](#)

Search Results

View 100 First 1-2 of 2 Last

Name	Routing Name
Woods, Brett	TPA211300
<u>Woods, Lilia M</u>	TPA125300

Search by the last name of the individual OR Search by the OPDP/Routing Name.

When searching by name ensure to select the correct person and verify the Routing Name OPDP/Routing Name matches that of the asset entered.

Look Up AO/Designee ✕

[Help](#)

Name

Routing Name ✕

[Basic Lookup](#)

Search Results

View 100 First ◀ 1-4 of 4 ▶ Last

Name	Routing Name
Johnson, Dale E	TPA125300
Luna, Flora R	TPA125300
Rabson, David A	TPA125300
Woods, Lilia M	TPA125300

If doing the search by OPDP/Routing Name Routing Name ensure to click on the correct AO/D.

Property Transfer

Request Number TRF NEXT Tag Number 495000275181 Status Pending

TRANSFER OF PROPERTY BETWEEN LOCATIONS AND/OR CHARTFIELDS

Please contact Asset Management Services with questions

Transfer Type

If Location Only change, check the appropriate button below.

Transfer to New Department

Transfer to New Location Only

Comments:

[View Comments](#)

TRANSFER FROM INFORMATION

Dept 125300

Operating Unit TPA

Department PHYSICS

Fund Code 10000

AO/Designee Woods, Lilia M

Department 125300

Phone 813/974- [REDACTED]

Product CAS016

Email [REDACTED]@USF.EDU

Initiative 0102593

Project

Contact Name Shaw, Noeella T

Contact Email [REDACTED]@USF.EDU

Contact Phone 813/974- [REDACTED]

You should automatically return to the Transfer Request page. The Phone Number and E-mail Address should now be populated with the AO/D information in FAST!

TRANSFER TO INFORMATION

Asset Location

Dept ID

Department

Operating Unit Dept Fund Code Product Initiative Project ID

Receiving AO/Designee

Email ID Phone

Next Scroll down to the Transfer To Information Section.

First Click on the Look Up for Asset Location

Look Up Asset Location
✕

[Help](#)

SetID
USFSI

Location Code

✕

Description

Look Up
Clear
Cancel
Basic Lookup

Search Results

View 100
First
◀
1 of 1
▶
Last

Location Code	Description
ALN0134A	JOHN & GRACE ALLEN BUILDING

Do a search for the location. The location provided may not be exactly correct. For example, ALN134A may be the location in the building, however the location in the system is ALN0134A. Should you do a search for a location ABC123 and it doesn't appear, enter a zero (0) before the numbers in the location code and try again. If you still can't find it you will not be able to proceed and should contact the individual to ask them to verify the location number. It's quite possible the location may not have been added. If this is the case, the nearest location should be selected and a comment entered in the comments section.

TRANSFER TO INFORMATION

Asset Location 🔍

Dept ID ✕ 🔍

Department

Operating Unit 🔍

Dept

Fund Code 🔍

Product 🔍

Initiative 🔍

Project ID 🔍

Receiving AO/Designee 🔍

Email ID

Phone

Next enter the Dept ID or use the look up to locate the department. Then tab out of the field. The page should refresh and display the Dept ID in the CF string and display the Department Name of the Department.

Look Up Dept ID x

Help

GL Business Unit

Department

Effective Date

Description

[Basic Lookup](#)

Search Results

View 100 First 1 of 1 Last

GL Business Unit	Department	Description	Short Description	Effective Date
USF01	390500	Sch of Global Sustainability	Glob Sustr	01/01/1900

TRANSFER TO INFORMATION

Asset Location

Dept ID

Department Sch of Global Sustainability

Operating Unit Dept

Fund Code Product

Initiative Project ID

Receiving AO/Designee

Email ID Phone

Next, enter the remaining values of the CF in the fields provided.

For Product and Initiative, 6 zeros and 7 zeros are acceptable and preferred.

Look Up Receiving AO/Designee x

[Help](#)

Name 2 x

Routing Name

[Basic Lookup](#)

Search Results

View 100 First 1-3 of 3 Last

Name 2	Routing Name
Boyd, Shirley A.	TPA321000
Boyd, Shirley A.	TPA341000
<u>Boyd, Shirley A.</u>	TPA390500

Next, use the Look up to search for the AO/D for the OPDP/Routing Name for the transferring to CF. Remember to ensure to select the correct one for the AO/D who will be the one to approve the transfer of the asset TO their department.

Look Up Receiving AO/Designee
✕

[Help](#)

Name 2

Routing Name

Look Up
Clear
Cancel
Basic Lookup

Search Results

View 100 First ◀ 1-6 of 6 ▶ Last

Name 2	Routing Name
Bowen,Vire Marie	TPA390500
Boyd,Shirley A.	TPA390500
Gaskell,Kelly Mercedes	TPA390500
Leon,Marilyn M	TPA390500
Toso,Kevin H	TPA390500
Wilcox,Ralph C	TPA390500

Remember you have the alternate option to search by the OPDP/Routing Name/Routing Name to locate the individual.

Property Transfer

Request Number TRF NEXT Tag Number 495000275181 Status Pending

TRANSFER OF PROPERTY BETWEEN LOCATIONS AND/OR CHARTFIELDS

Please contact Asset Management Services with questions

Transfer Type

If Location Only change, check the appropriate button below.

Transfer to New Department Transfer to New Location Only

Comments: [View Comments](#)

TRANSFER FROM INFORMATION

Dept 125300 Operating Unit TPA
Department PHYSICS Fund Code 10000
AO/Designee Woods,Lilia M Department 125300
Phone 813/974- Phone Product CAS016
Email @USF.EDU Initiative 0102593
Project
Contact Name Shaw,Noeella T
Contact Email @USF.EDU Contact Phone 813/974- Phone

ASSET INFORMATION

Tag Number 495000275181 Asset ID 000000320534
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 INFORMATION

Asset Location ALN0134A
Dept ID 390500 Department Sch of Global Sustainability
Operating Unit Dept Fund Code Product Initiative Project ID
TPA 390500 10000 000000 0000000
Receiving AO/Designee Boyd,Shirley A.
Email ID @USF.EDU Phone 813/974- Phone

Once you have reviewed the form. Click SAVE

Property Transfer

Request Number TRF 000000789 Tag Number 495000275181 Status Pending

TRANSFER OF PROPERTY BETWEEN LOCATIONS AND/OR CHARTFIELDS

Please contact Asset Management Services with questions

Transfer Type

If Location Only change, check the appropriate button below.

Transfer to New Department Transfer to New Location Only

Comments: [View Comments](#)

TRANSFER FROM INFORMATION

Dept 125300 Operating Unit TPA
Department PHYSICS Fund Code 10000
AO/Designee Woods,Lilia M Department 125300
Phone 813/974- Product CAS016
Email @USF.EDU Initiative 0102593
Project
Contact Name Shaw,Noellella T
Contact Email @USF.EDU Contact Phone 813/974-

ASSET INFORMATION

Tag Number 495000275181 Asset ID 000000320534
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 INFORMATION

Asset Location ALND134A
Dept ID 390500 Department Sch of Global Sustainability
Operating Unit Dept Fund Code Product Initiative Project ID
TPA 390500 10000 000000 0000000
Receiving AO/Designee Boyd,Shirley A.
Email ID @USF.EDU Phone 813/974-

Submit

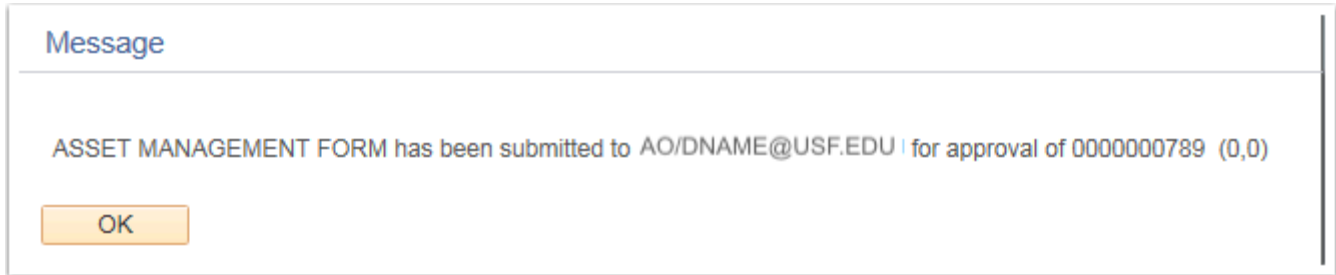
Save Notify

Add Update/Display

Should there be anything incorrectly entered the system will flag the field by turning it red. You will need to take corrective action before continuing. If everything is ok, a submit button will display. Also at the top the NEXT has changed to the sequentially assigned number for the request. For

this request, should inquiries to AM Office need to be made you would reference TRF0000000789. TRF signifies to us it's a transfer request and the number helps us locate it in the system.

If everything is good to go, click on SUBMIT at the bottom.



You should be presented with a message dialog which states the form has been submitted and the E-mail address the notification has been sent to.

CONGRATULATIONS! You've successfully entered a New Department Transfer Request.

The approvals are explained after the image.

Approvals

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.

Please refer to the section near the end of this document on reviewing the status of an existing transfer request.

Entering a Transfer to New Location Only Request

The following details entry of a Property Transfer Request to a new location ONLY. The asset MUST be remaining on the same CF string and under the same Accountable Officer(s)/Designee(s).

Property Transfer

Business Unit

AM Form Number

AM Form Type

Tag Number

[Find an Existing Value](#) | [Add a New Value](#)

Should an asset be remaining on the same CF but the asset is moving to a new location, the department is required to notify the AM Office of the move. This is important for the AM Office to locate fixed assets for inventory so they do not appear on department's missing list.

You need to do the same verification using the query as for the TRF DEPT, HOWEVER the multiple CF rule does not apply here. The AO/D rules still apply though. Should you have a split between two different department IDs you will need to use the AO/D associated with the CF selected by the system. This CF is the first CF presented in the list.

To enter a Transfer to New Location request, navigate to the same place as for a Transfer to New Department USF Home Page>USF Asset Management Home Page>USF Asset Requests>Transfer Request

Enter the tag number and click Add

Property Transfer

Request Number TRF NEXT Tag Number 495000275181 Status Pending

TRANSFER OF PROPERTY BETWEEN LOCATIONS AND/OR CHARTFIELDS

Please contact Asset Management Services with questions

Transfer Type

If Location Only change, check the appropriate button below.

Transfer to New Department

Transfer to New Location Only

Comments:

[View Comments](#)

TRANSFER FROM INFORMATION

Dept 125300 Operating Unit TPA
Department PHYSICS Fund Code 10000
AO/Designee Department 125300
Phone Product CAS016
Email Initiative 0102593
Project
Contact Name Shaw, Noeella T
Contact Email @USF.EDU Contact Phone 813/974-

ASSET INFORMATION

Tag Number 495000275181 Asset ID 000000320534
Description 36"X72"X1 OPTICAL TABLE Model CLEAN TOP II
Manufacturer TMC Serial ID NONE
Location ISA4045 Acquisition Date 11/26/2014
Cost 8458.49 Net Book Value 6030.59

TRANSFER TO INFORMATION

Asset Location Dept ID
Department
Operating Unit Dept Fund Code Product Initiative Project ID

Receiving AO/Designee
Email ID Phone

Select the "Transfer to New Location Only" Radio Button. The form will update and change.

Property Transfer

Request Number TRF NEXT Tag Number 495000275181 Status Pending

TRANSFER OF PROPERTY BETWEEN LOCATIONS AND/OR CHARTFIELDS

Please contact Asset Management Services with questions

Transfer Type

If Location Only change, check the appropriate button below.

Transfer to New Department

Transfer to New Location Only

Comments:

[View Comments](#)

TRANSFER FROM INFORMATION

Dept 125300 Operating Unit TPA
Department PHYSICS Fund Code 10000
AO/Designee Department 125300
Phone Product CAS016
Email Initiative 0102593
Project
Contact Name Shaw, Noellella T
Contact Email @USF.EDU Contact Phone 813/974-

ASSET INFORMATION

Tag Number 495000275181 Asset ID 000000320534
Description 36"X72"X1 OPTICAL TABLE Model CLEAN TOP II
Manufacturer TMC Serial ID NONE
Location ISA4045 Acquisition Date 11/26/2014
Cost 8458.49 Net Book Value 6030.59

TRANSFER TO INFORMATION

Asset Location

Save Notify

Add Update/Display

There are TWO fields to complete for this. The Transfer From AO/D and the Transfer To Location ID.

Enter the AO/D as you would for a TRF DEPT.
Enter the location where the asset is being transferred to.

Property Transfer

Request Number TRF NEXT Tag Number 495000275181 Status Pending

TRANSFER OF PROPERTY BETWEEN LOCATIONS AND/OR CHARTFIELDS

Please contact Asset Management Services with questions

Transfer Type

If Location Only change, check the appropriate button below.

Transfer to New Department

Transfer to New Location Only

Comments:

[View Comments](#)

TRANSFER FROM INFORMATION

Dept 125300

Operating Unit TPA

Department PHYSICS

Fund Code 10000

AO/Designee Woods, Lilia M

Department 125300

Phone 813/974-██████

Product CAS016

Email ██████@USF.EDU

Initiative 0102593

Project

Contact Name Shaw, Noeella T

Contact Email ██████@USF.EDU

Contact Phone 813/974-██████

ASSET INFORMATION

Tag Number 495000275181

Asset ID 000000320534

Description 36"X72"X1 OPTICAL TABLE

Model CLEAN TOP II

Manufacturer TMC

Serial ID NONE

Location ISA4045

Acquisition Date 11/26/2014

Cost

8458.49

Net Book Value

6030.59

TRANSFER TO INFORMATION

Asset Location ALND134A x

Save Notify

Add Update/Display

Property Transfer

Request Number TRF 000000790 Tag Number 495000275181 Status Pending

TRANSFER OF PROPERTY BETWEEN LOCATIONS AND/OR CHARTFIELDS

Please contact Asset Management Services with questions

Transfer Type

If Location Only change, check the appropriate button below.

Transfer to New Department

Transfer to New Location Only

Comments:

[View Comments](#)

TRANSFER FROM INFORMATION

Dept 125300 Operating Unit TPA
Department PHYSICS Fund Code 10000
AO/Designee Woods, Lilia M Department 125300
Phone 813/974- Product CAS016
Email @USF.EDU Initiative 0102593
Project
Contact Name Shaw, Noeella T
Contact Email @USF.EDU Contact Phone 813/974-

ASSET INFORMATION

Tag Number 495000275181 Asset ID 000000320534
Description 36"X72"X1 OPTICAL TABLE Model CLEAN TOP II
Manufacturer TMC Serial ID NONE
Location ISA4045 Acquisition Date 11/26/2014
Cost 8458.49 Net Book Value 6030.59

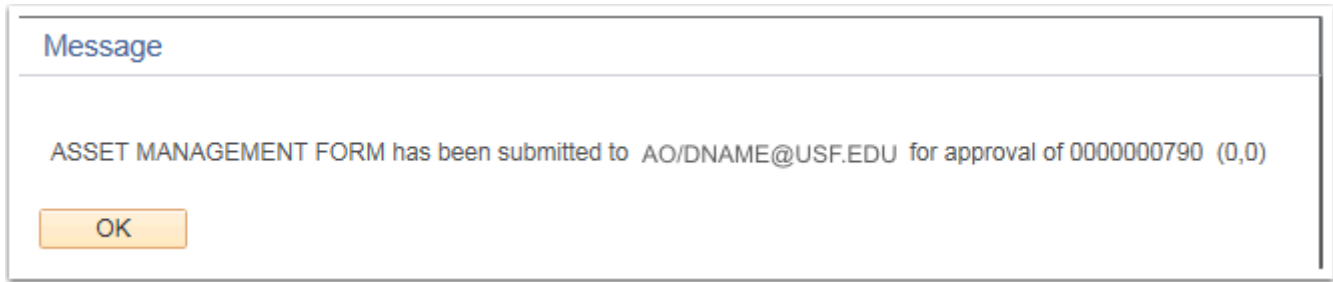
TRANSFER TO INFORMATION

Asset Location ALN0134A

Submit

Once finished, click SAVE

Then click Submit



You should be presented with a message dialog which states the form has been submitted and the E-mail address the notification has been sent to.


Make note of the form number. This form number is important for reviewing or inquiring in regards to the submitted request. Please refer to the next section on locating and reviewing existing transfer requests.


Viewing an existing Transfer Request


Property Transfer

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

▼ **Search Criteria**

AM Form Number begins with 

Tag Number 

[Basic Search](#)  [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Sometimes you may wonder where your Transfer Request is at. To determine what the status of your request you can navigate to the Transfer Request page you used to create the Transfer Request. However, this time click on the Find an Existing Value Tab


You can either Enter the Transfer Form's Numerical Value in the AM Form Number field OR You can enter the tag number for the asset. Please keep in mind this will bring back all the Transfer Request forms created for the tag number


This method shows you the form in its entirety. If you wish to view just approvals please see the section after this one titled, 'AM Form Approval History' which provides a less detailed view of the approvals and may be more preferred if you are only wanting to know the status.


Property Transfer

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

▼ **Search Criteria**

AM Form Number begins with 

Tag Number 


[Basic Search](#)  [Save Search Criteria](#)


Property Transfer

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

▼ **Search Criteria**

AM Form Number begins with

Tag Number 

[Basic Search](#)  [Save Search Criteria](#)

Property Transfer

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

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

AM Form Number begins with 
Tag Number begins with 

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

Search Results

View All First  1-3 of 3  Last

Business Unit	AM Form Number	AM Form Type	Tag Number	Status	Last Update User ID	Last Update Date/Time	Name	Asset Identification
USF01	0000000790	TRF	495000275181	Submitted	TSHAW	08/01/2017 1:16:14PM	Woods,Lilia M	000000320534
USF01	0000000789	TRF	495000275181	Submitted	TSHAW	08/01/2017 12:01:36PM	Woods,Lilia M	000000320534
USF01	0000000116	TRF	495000275181	Submitted	DRABSON	03/08/2017 10:58:25AM	Rabson,David A	000000320534

In the image that follows, you can see the results for a Tag Number search. This Asset has had several forms already submitted for it. Please understand the images are from a testing database and the same tag numbers were used multiple times for transfers during the development and testing phases to create the forms process.

The form Status may be one of the following:

For TRF DEPT:

Pending - This form either has not been submitted for approvals yet, or it was rejected for correction.

Submitted - This form has been submitted for approvals. It has not yet received the AO/D approval for the transfer from information.

AO Approval Completed - This status signifies the form has received its transfer from AO/D approval and is now waiting for either the transfer to AO/D approval OR if there is a project associated with the CF the DSR approval.

Grant - Research Approved - This status indicates DSR approved the request to transfer. This only appears if the asset has a project ID and went to DSR for approvals. It also indicates the form is awaiting Receiving AO Approval.

Receiving AO Approved - This status indicates the receiving AO/D approved the request to transfer to them and the form is now awaiting final action by the AM Office

For TRF LOC

Pending - This form either has not been submitted for approvals yet, or it was rejected for correction.

Submitted - This form has been submitted for approvals. It has not yet received the AO/D approval for the transfer from information.

AO Approval Completed - This status signifies the form has received its transfer from AO/D approval and is now waiting for final action by the AM Office.

Property Transfer

Request Number TRF 0000000789 **Tag Number** 495000275181 **Status** Final - Approved

TRANSFER OF PROPERTY BETWEEN LOCATIONS AND/OR CHARTFIELDS

Please contact Asset Management Services with questions

Transfer Type

If Location Only change, check the appropriate button below.

- Transfer to New Department
- Transfer to New Location Only

Comments: [View Comments](#)

TRANSFER FROM INFORMATION

Dept 125300	Operating Unit TPA
Department PHYSICS	Fund Code 10000
AO/Designee Woods,Lilia M	Department 125300
Phone 813/974-██████	Product CAS016
Email ██████@USF.EDU	Initiative 0102593
	Project
Contact Name Shaw,Noeella T	
Contact Email ██████@USF.EDU	Contact Phone 813/974-██████

ASSET INFORMATION

Tag Number 495000275181	Asset ID 000000320534
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 INFORMATION

Asset Location ALN0134A

Dept ID 390500

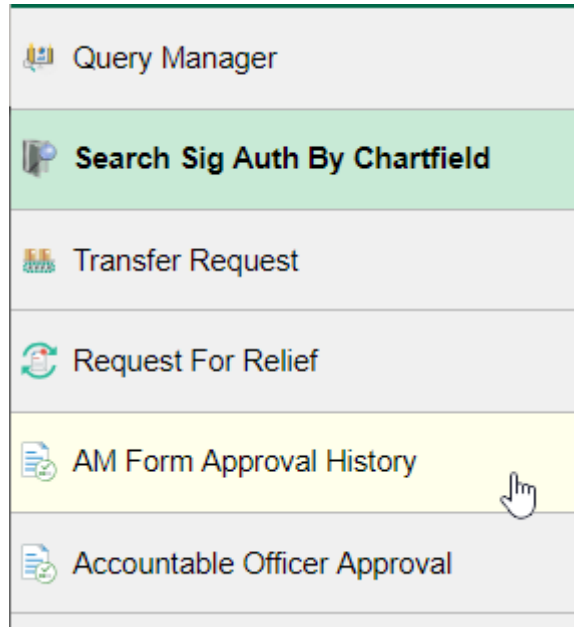
Department Sch of Global Sustainability

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

Receiving AO/Designee Boyd,Shirley A.

Email ID ██████@USF.EDU **Phone** 813/974-██████

AM Form Approval History



To review the Approval History and comments on a request go to the USF Asset Requests homepage and then click on 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.

AM Form Approval History

Request Number TRF 000000713

Tag Number 495000275498

Asset Identification 000000321214

Personalize Find View All First 1-6 of 6 Last				
	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	

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.

AM Form Approval History

Request Number TRF 000000724

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.

Rejection Handling

FASTTEST - Asset Management Form Approval Notification



FASTTEST_Do_Not_Reply@forest.usf.edu

Today, 4:39 PM

[Redacted]



Reply | v

Inbox

The Asset Form 0000000795 was returned for revision. Please log into FAST through the MyUSF: <https://webauth.usf.edu/login> Once logged in navigate to Main Menu > USF Menu Items > Asset Forms > Submit Forms > Transfer Request and search for the form number in the 'Find an Existing Value' tab.

To handle a rejected transfer request the user will need to review the reasons why the request was rejected. Then once those are identified the user will need to correct and then resubmit for approvals. An E-mail is send to the submitter when a request is rejected.

Final Action Taken Notification

Reply | ▾



Delete

Junk | ▾



[REDACTED] - Asset Management Form Approval Notification



[REDACTED]_Do_Not_Reply@forest.usf.edu

Sat 8/5/2017 1:50 PM

To: ✓ [REDACTED]

Cc: ✓ [REDACTED]



Reply | ▾

Inbox

Final action is complete for Asset Form 0000000789 and no further action is required. Thank you.

When all approvals are complete and the AM Office has taken action on the request, as stated earlier in this document, a notification will be sent to the submitter. The notification will be an E-mail similar to the one below.

This is the end of the document.