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Overview

To complete the tasks demonstrated in this work instruction, you must have a role in Workday. In AssetWorks, cost center user profiles are maintained by the nightly user and profile integration from Workday.

**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.

**Approving a transfer request**
Departmental AssetWorks users may need to request access as a cost center manager to approve transfer requests. Approvers will only have access to 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 using the Workday role provisioning process via ServiceNow.
Gain access to AssetWorks

1. Access ServiceNow and then follow the steps below. To gain access to AssetWorks, the user needs to apply for a role using the Workday Role Requests provisioning process.
2. Click on **FMS Department Role Request** and fill out the form appropriately.

Please note: Multiple cost centers can be listed as needed.
Sign into AssetWorks

Login to the AssetWorks by clicking on the Login Using SSO link and sign in with your ASURITE ID and password. The AssetWorks homepage will display.

If you only see the Home tab, you still need to request a Workday role for access to your cost center(s).
Search for an asset

1. Use this process when you need to search for an asset to set up a transfer request for disposal. You will search for an item that has a Tag Number/Property Control Number attached to it as the first step in the transfer process. Please note: The Tag Number/Property Control Number is seven digits and typically starts with a 4 or 6.

2. Yellow tags are government-related and you will want to contact property-q@asu.edu. Federally funded assets will typically be shown as being active unless Capital Asset Management has already approved and executed the disposition of the asset.

3. If there is not a Property Control Number, you can search for a non-tagged asset by typing in the description to get this number.

4. Click the Assets tab, and the Search Assets window will display.
5. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tag Number</td>
<td>Enter the asset tag number if you have it.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a description of the asset if you are searching by description.</td>
</tr>
<tr>
<td>Asset Status</td>
<td>Select an asset status to filter your results to a particular status.</td>
</tr>
<tr>
<td></td>
<td>• All.</td>
</tr>
<tr>
<td></td>
<td>• Active.</td>
</tr>
<tr>
<td></td>
<td>• In Online Auction.</td>
</tr>
<tr>
<td></td>
<td>• In Transfer.</td>
</tr>
<tr>
<td></td>
<td>• Inactive.</td>
</tr>
<tr>
<td></td>
<td>• Not Inactive.</td>
</tr>
<tr>
<td></td>
<td>• On a Lot.</td>
</tr>
<tr>
<td></td>
<td>• Pending Receipt.</td>
</tr>
<tr>
<td></td>
<td>Depending on your access level, you may not see all of these statuses.</td>
</tr>
</tbody>
</table>

6. Click **Search**. A list of assets will display based on the search criteria.
**Note:** You may return many results if you run a broad search. Check the bottom right corner of the search results to see the number of returned results and click through the pages using the next button.

7. To open a line on the results page, click the view icon 📊. The **Detail Page** will open.
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 are planning to do a transfer next, make a note of the Cost Center for the asset you wish to transfer.

8. **Note:** If the Property Control Number does not populate in the “Create an Asset field,” it may either belong to another Cost Center or it is not in the system. If the asset belongs to another Cost Center, it will state it when trying to create an asset. If you have any other questions, please contact **property-q@asu.edu** for more information regarding your asset.
Add an asset

1. Use this process when you need to add an asset to the system.

2. Click the **Assets** Tab, under the Assets sidebar and there will be a **Create** option.

3. The Asset Insert page will show. Complete as much information as possible.
   a. Asterisks indicate required fields to complete.
   b. Non-asterisk fields are recommended to assist Surplus and other departments to better identify and track assets.
There are three options to save the asset.

1. **Save and View** — Asset will be saved and information can be previewed.
2. **Save and Same** — Asset will be saved and an Asset Insert page will open to create a new asset with similar fields.
3. **Save and New** — Asset will be saved and an empty Asset Insert page will open to create a new asset.
ERROR Messages:

4. Error messages will appear above the Asset Insert when an Asterisks field is not completed or a Property Control Number is already active in the system. Message will state more information.

5. If the Property Control Number is active in the system, then the user may need to transfer or contact the department to transfer from the correct Cost Center.

6. Once the Asset is created, the Property Control Number will be saved in the system.

Note: Assets can also be created under the Transfer Tab when a new Surplus Transfer is created. These assets will be created to be sent to Surplus. If a department needs to keep track of its assets, those assets 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, cost center user profiles are maintained by the nightly user and profile integration from Workday.

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 using the Workday role provisioning process via ServiceNow. Use this process when you need to dispose of surplus items. Create and submit the request in AssetWorks for approval. Once approved, your request will generate a pickup for the item(s) that need to be transferred to Surplus Property.
1. Click the **Transfers** tab. The page will automatically open to the **Create Surplus Transfer** section.
2. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>From Cost Center</td>
<td>The Cost Center field is prepopulated with the Cost Center assigned to the user in PeopleSoft. You can change this field if you have access to more than one cost center.</td>
</tr>
<tr>
<td>Pickup/Delivery Type</td>
<td>Select either the Third-Party Delivery or Scheduled Surplus Property Pickup. A Third-Party Delivery is either a moving company or the department requesting the transfer.</td>
</tr>
<tr>
<td>Building</td>
<td>Enter the building where the surplus items are located. Note: The system will perform a smart search based on the text you provide.</td>
</tr>
<tr>
<td>Room</td>
<td>Enter the room or cube number where the surplus items are located.</td>
</tr>
<tr>
<td>Contact Information</td>
<td>The contact information fields will prepopulate with your contact information, but you may change this information if you are not the contact.</td>
</tr>
<tr>
<td>Terms and Conditions</td>
<td>Read the terms and conditions and check the box to indicate that you agree.</td>
</tr>
</tbody>
</table>

3. Click **Create** to generate the transfer request header.

4. Next, identify which assets will be sent to Surplus. If you have a Tag Number/ASU Property Control Number, enter it in the **Tag Number** field. Each Tag Number/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 do not have a Tag Number/ASU Property Control Number, click **Create New Asset**.
6. If you are creating a new asset, the **Insert Surplus Asset** page will display.

![Insert Surplus Asset](image)

7. Complete the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Enter a description of the item.</td>
</tr>
<tr>
<td>Class</td>
<td>Enter the item type and use the next to the class field to see the options.</td>
</tr>
<tr>
<td>Department Name</td>
<td>Enter the department name.</td>
</tr>
<tr>
<td>Condition</td>
<td>Enter the condition: Good, Fair or Poor.</td>
</tr>
<tr>
<td>Quantity</td>
<td>Enter the quantity of the items being sent.</td>
</tr>
<tr>
<td>UoM</td>
<td>The Unit of Measure prepopulates to Each, but you may click the down arrow for other choices.</td>
</tr>
</tbody>
</table>

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. This will help Surplus coordinate pick-ups appropriately.**

10. Click **Submit for Approval**. A success message will display.
11. Please note there are two reasons why a Tag Number/Property Control Number is not populating the asset in the “Create an Asset” field:

- Capital Asset Management did not transfer all the Tag Numbers/Property Control Numbers into AssetWorks because some of them were too old.
- The Tag Number/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.

12. 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. Regarding Property Control Numbers, they have to be one at a time. However, Non-Property Control Numbers can be grouped together. The size of the asset will determine if it can be grouped together or entered as a one-line item. For example, office supplies (i.e. staplers, tape) can be combined, but a lab freezer needs to stand alone.
Approve a transfer request

Overview

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Approving a transfer request
Departmental AssetWorks users may need to request access as a cost center manager to approve transfer requests. Approvers will only have access to 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 using the Workday role provisioning process via ServiceNow.
Use this process when you need to make an approval decision for an asset transfer. **Please 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 pertaining to their Cost Center.

1. Click the **Transfer** tab. The transfer window will display.

2. Enter the transfer number to be approved from the email you received on the **Surplus Transfer Number** field.

3. Click **Search**. The item will display under **Surplus Transfers**.
4. Click the view icon 📜. The **Surplus Detail** screen will display. The assets being transferred to Surplus are listed at the bottom of the page.
5. Click **Approve** to start the approval process. Some transfers will include multiple assets to be transferred. If there are multiple line items, you will need to approve or reject each line of assets.

6. 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**.

7. If you choose to 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, and the other items will be approved and the transfer request will be sent to Surplus Property.
8. Click **Save** once you have changed all of the statuses from **Pending** to either **Approved** or Rejected. The transfer request is sent to Surplus Property for processing.
Locate a submitted transfer request

1. Click on the “Transfers” tab at the top of the screen, then click on the “Adhoc Search Surplus Transfers” down arrow button. This will show all the transfers created thus far.