



Department of Finance

PeopleSoft Asset Self Service



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

Contents

01 Introduction

02 Basics of Fluid Interface

03 Viewing an asset

04 Asset self-service verification

05 Electronic Asset Removal Permit

06 Electronic Physical move function

01 Introduction

Expected outcomes from this training

	Basic	Intermediate	Advanced
New User Orientation	✓		
Ability to view an asset		✓	
Complete verification of assets		✓	
Request a removal permit		✓	
Approve a removal permit		✓	
Request physical move of asset/(s)		✓	
Approve request for physical move			



Background

UP Asset Register

The asset register forms an important part of the University's financial information. It is therefore very important to ensure that the asset information is always up to date. Asset information includes the asset tag number, location of the asset, the responsible person (custodian) and the department (OU) responsible for the safekeeping of the asset.

It is the responsibility of every staff member to ensure that all assets assigned to them are completely and accurately reflected on the asset register.



02 Basics of Fluid Interface

How to login to PeopleSoft FSM

Step 1

Login to the staff system portals with your user ID and password



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

WELCOME

Login / sign up here to view your personal online portal.

Please login with your "u" username. For example: username u01234567.
(Note: The system no longer supports user sign on with "p" usernames.)

[NEW USER](#)

[LOGIN](#) [Lost \(forgotten\) password](#) [Change password](#)

Step 2

At the staff system portals find the link:
PeopleSoft Financials (FSCM) Financials and Supply Chain

ADD / REMOVE PORTLETS CUSTOMISE PORTLETS RESET PORTAL LAYOUT COLLAPSE ALL PORTLETS

 Custom Role Manager User Access Management	 LinkedIn Learning LinkedIn	 Mockmail ITS Services
 UP Google Account ITS Services	 TuksPrint Functions TuksPrint	 Research Grants & Ethics Research Management
 Research Data Mngmnt: Platform Research Management	 PeopleSoft Financials [FSCM] Financials & Supply Chain	 Staff Onboarding (Hire) Human Resources

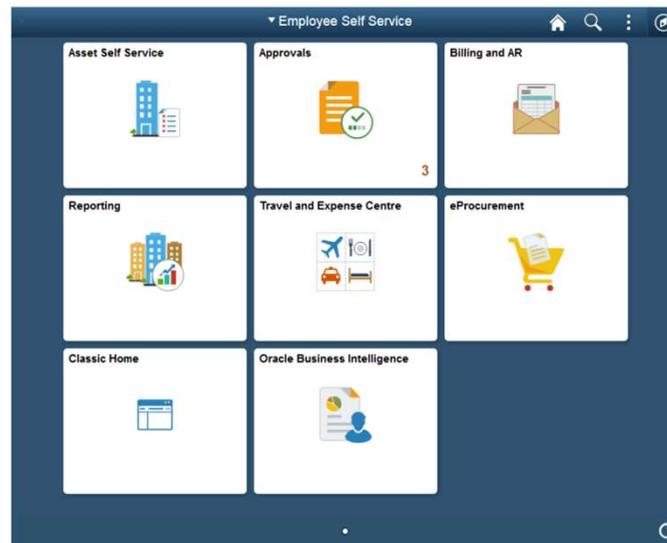




PeopleSoft Fluid

Fluid is a new user interface for PeopleSoft designed to provide users with an intuitive experience in navigating the PeopleSoft system. The new tile interface is specifically designed for use on smartphones and tablets, but can also enhance productivity on desktops and laptops.

New Fluid Homepage:



Key highlights:



Easy access to approvals



Faster load times



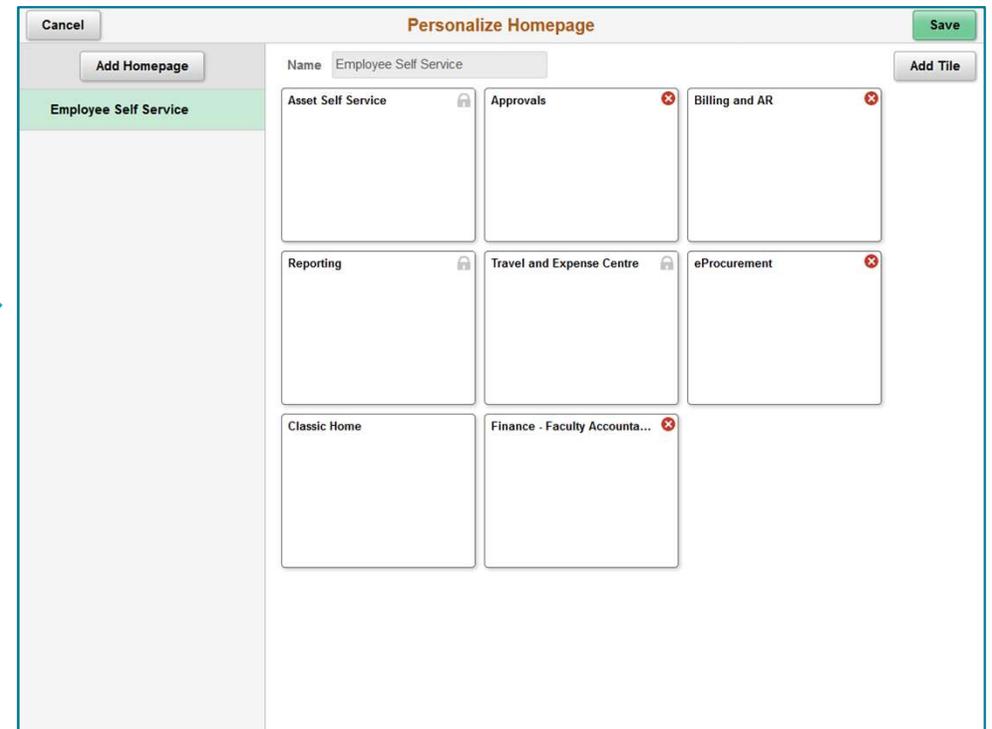
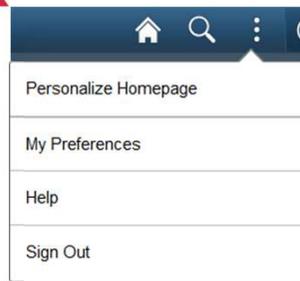
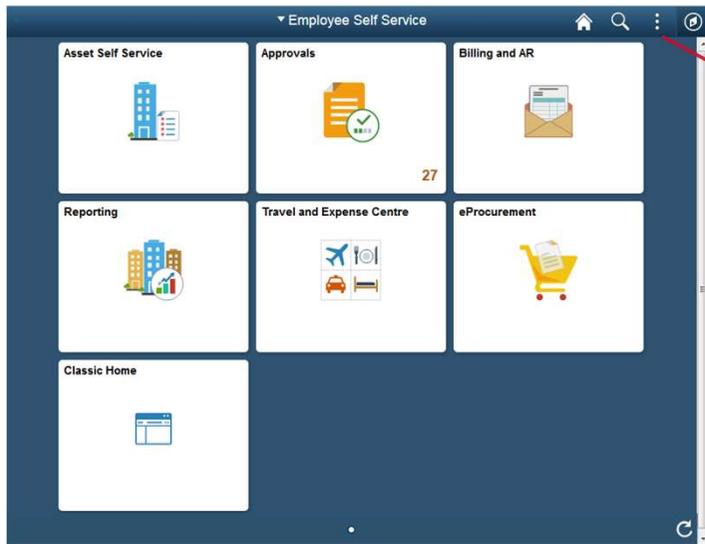
Mobile friendly



Tile-based navigation

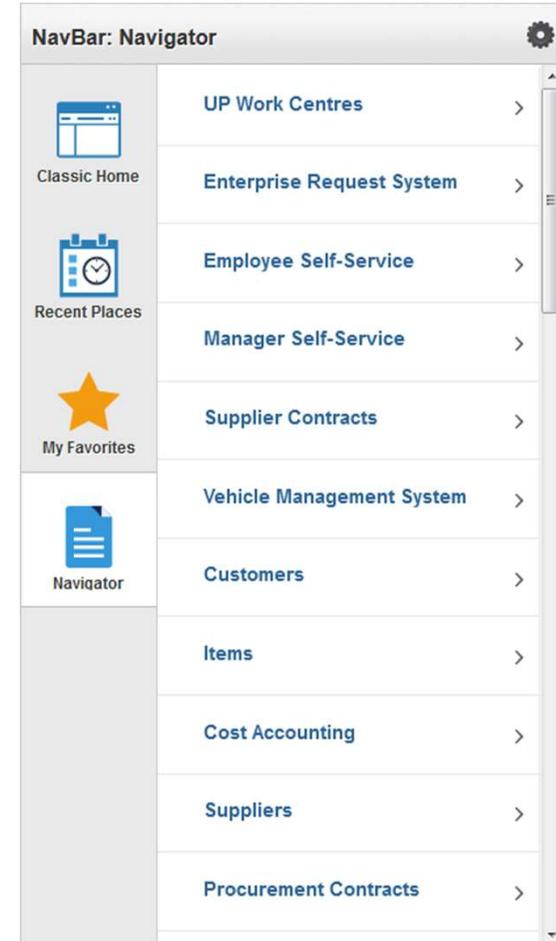
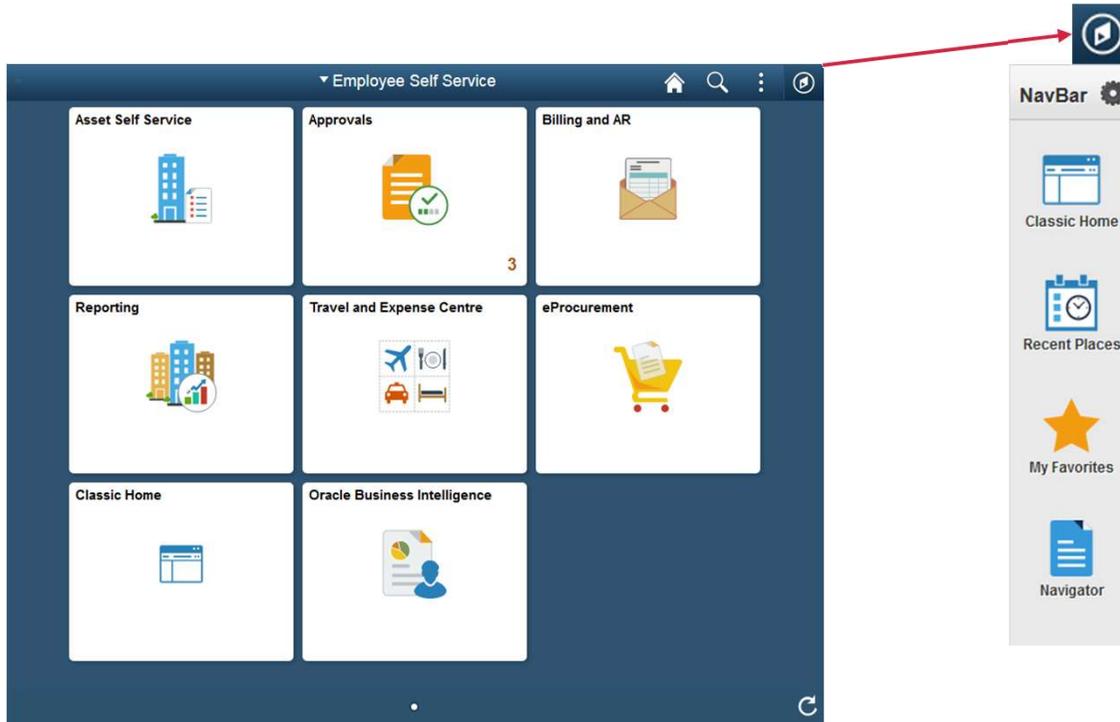
Customising the Fluid Homepage

- Click on the  icon and go to Personalise Homepage
- To remove a tile – click on the red “x” icon
- To add a tile – click on Add Tile and search for a tile to add

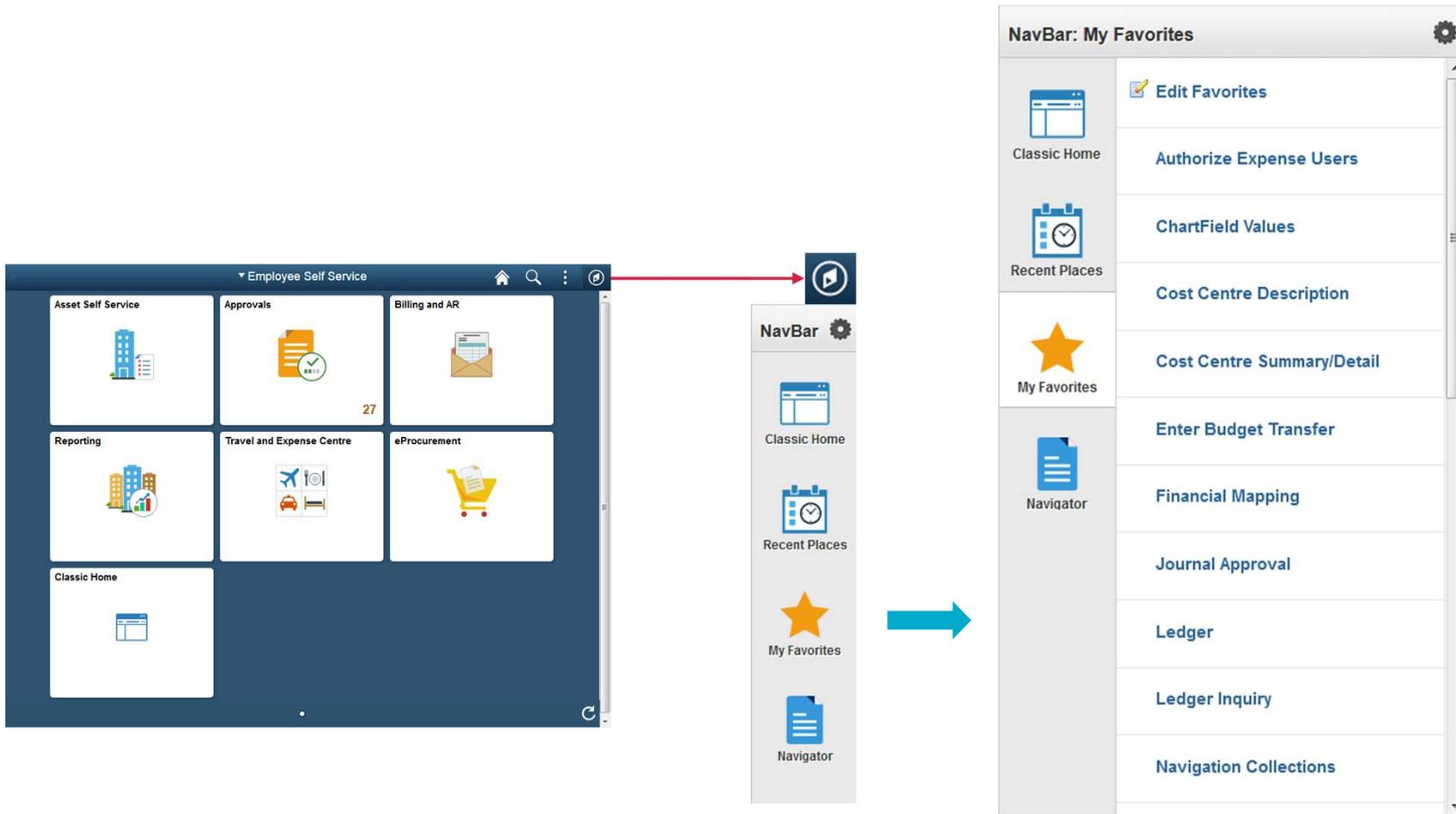


Fluid NavBar - Navigator

- Click on the  icon and to display the NavBar
- The NavBar Displays Recent Places, Favourites and Navigator
- Navigator replaces the the old “Main Menu” and is used to navigate to various system functions

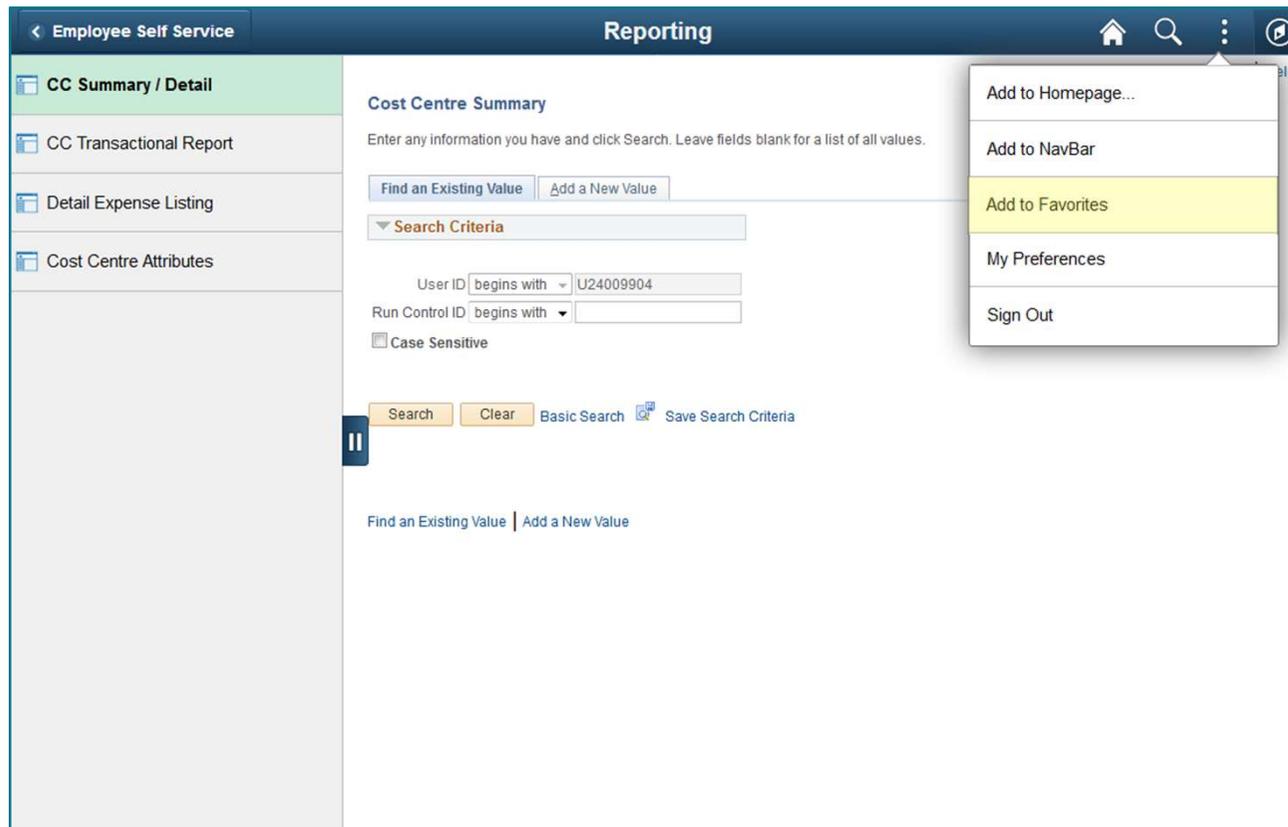


Fluid NavBar - Favorites

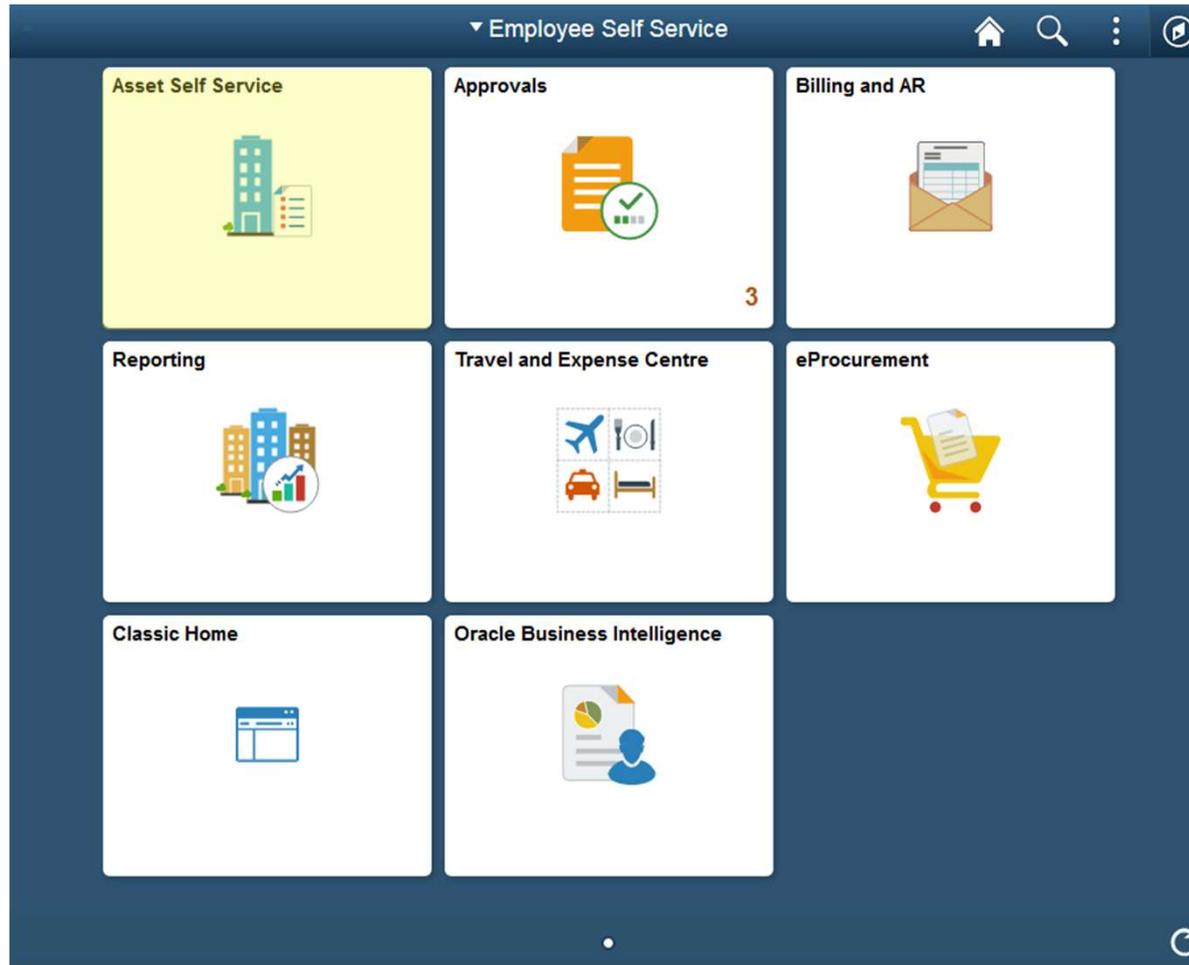


Adding Favorites

Within any page on PeopleSoft, click on the  icon and go to "Add to Favorites"



Navigation to Asset Self Service



03 Viewing an asset

Information available through a “View Asset Info” report

View Asset Detail

This PeopleSoft report allows a user to print basic asset information as reflected on the UP asset register, such as:

- Asset ID (system generated number)
 - Tag number (UP barcode)
 - Asset Description
 - Asset Class / Category
 - Current location
 - Acquisition date
 - Serial ID
 - Current custodian
 - Transaction Amount
 - PO and Invoice number
-

“

Every staff member is directly responsible for the physical safekeeping of all PPE controlled, used or allocated to him/her... [A03/12]

”



Navigation to view asset details

Click on "View Asset Info"

The screenshot displays the 'Asset Self Service' interface. On the left, a navigation menu is visible with the following items: 'View Asset Info' (highlighted in green), 'Verification and Transfers', 'Cancel Asset Transfer', 'Asset Removal', and 'Manager Approvals'. The main content area is titled 'View Asset Info' and contains the following elements:

- A header bar with 'Employee Self Service' and 'Asset Self Service' tabs, and navigation icons (Home, Search, Menu, Refresh) and 'New Window | Help' text.
- A search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.'
- A 'Find an Existing Value' button.
- A 'Search Criteria' section with a dropdown arrow.
- Search fields: 'Business Unit' (dropdown), 'UP000' (text input), 'Asset Identification begins with' (dropdown), 'Tag Number begins with' (dropdown), 'Serial ID begins with' (dropdown), 'PO Number begins with' (dropdown), 'Description begins with' (dropdown), and 'Asset Status' (dropdown).
- A 'Case Sensitive' checkbox.
- Buttons: 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.



How to find an asset

Employee Self Service

Asset Self Service

New Window | Help

View Asset Info

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

Find an Existing Value

Search Criteria

Business Unit =

Asset Identification begins with

Tag Number begins with

Serial ID begins with

PO Number begins with

Description begins with

Asset Status =

Case Sensitive

Search Clear Basic Search Save Search Criteria

To find an asset enter the asset Tag Number located on the physical asset. Then click on "Search"

Click on the *collapse* icon  to hide or view the side pane



Asset information displayed

All relevant information relating to the asset tag entered will be displayed

Key information such as location and custodian can be identified

Employee Self Service
Asset Self Service

UP View of Asset

Unit: UP000 Asset ID: 000000389629 Acer Aspire i3 laptop (PEN 783) Status: In Service As of Date: 2019/04/23

Tag Number: 908673 This Asset is Offsite

Description: Acer Aspire i3 laptop (PEN 783)

Long Description: Acer Aspire i3 laptop (PEN 783)

Serial ID: NXML8EA0355090192D34

Profile ID: COMP Computer Equipment

Location: 0400500328 ADMIN 3-61: OFFC

Custodian: Dockrat,Riaaz Empl ID: 24009904 Cust Resp OU: 07078 Budget Control

Acquisition Date: 2015/06/29

Total Cost: 7906.73 Salvage Value: 770.000

Acquisition Details														Personalize Find			
	System Source	PO Number	Supplier ID	Supplier Name	Voucher ID	Invoice Number	Qty	Amount	Cost Centre	Responsible OU	Resp OU Descr	Transaction OU	Txn OU Descr	Project	First	1-2 of 2	Last
1	PO Online Entry Panel	0000315211	10008411	CREATEK SYSTEMS			1.0000	7906.730	K06624	00036	Information Technology Service	00036	Information Technology Service	K066245			
2	AP Online Entry Page	0000315211	10008411	CREATEK SYSTEMS	00700007	0000101913	1.0000	7043.860	K06624	00036	Information Technology Service	00036	Information Technology Service	K066245			

Group Box

Asset Image



04 Asset self-service: Verification & Transfers

Self-Service verification of assets

Why do assets need to be verified?

When an individual is assigned an asset he/she is referred to as the “custodian” of the asset. It is the responsibility of every custodian to ensure that all assets assigned to them are completely and accurately reflected.

In an effort to ensure the accuracy of asset information, the Finance department requests custodians to verify assets assigned to them. This section of the training will provide details of how to “Verify Assets”

Who can be a custodian of an asset?

UP staff member with permanent appointment according to HR records.

“

The asset information that makes up the University’s asset register needs to be maintained to ensure that it is always up to date.

”

Navigation to “View/Transfer Assets”

Click on “Verification and Transfers”

My Assets
Sipho Mtshaba
IMPORTANT NOTICE:
IT IS VERY IMPORTANT TO READ THE FOLLOWING DOCUMENTS.
FAILURE TO DO SO MAY HAVE SERIOUS CONSEQUENCES.
PPE Financial Procedure
Code of Conduct
I hereby acknowledge and agree that I have familiarized myself with the Property, Plant and Equipment (PPE) Financial Procedure (A0317) and the Code of Conduct relating to the use of assets in it's entirety and that I fully understand the nature, content and implications hereof, and that I shall be fully bound thereto.
Please note: Assets with a cost of R5000 or less (except for Art and TVs) will not be reflected on your list of assets to be verified.
Please note that you will not be able to continue with the process before you tick "I agree".
 I Agree
Click an Asset link to view asset detail information
Click the Status link to view Approval Status.
Click Verify to verify that the asset information is correct.
Click Transfer to submit a Transfer Request or correction of asset information.

Transaction Information

Select	Tag Number	Asset	Department	Location Description	Condition	Asset ID	Approval Status	Verified?		Offsite Flag	Verify Comment
<input type="checkbox"/>	813547	LG735EA - HP Elitebook 8560P	Asset and Insurance Management	ADMIN 5-49 1: OFFC	<input type="text"/>	00000028954	-	Yes	<input type="button" value="Transfer"/>	<input type="checkbox"/>	
<input type="checkbox"/>	927930	Value PC (UP805116)	Information Technology Service	ADMIN 5-49 1: OFFC	Excellent	000000423933	-	Yes	<input type="button" value="Transfer"/>	<input type="checkbox"/>	

YES, Verify Selected Assets NO, Do Not Verify Selected Assets Update Assets' Condition

Click on the *collapse* icon  to hide or view the side pane



Asset information displayed

Custodian

Click on the links to access the PPE Financial Procedure document and the Code of Conduct document

Click on "I Agree" if you have read the policy documents and agree

Assets assigned to this custodian is provided in the table

Click on "YES, Verify Selected Assets" or "NO, Do Not Verify Selected Assets"

Click on "Transfer" to notify Asset Management for corrections – see next slide for further information

Remember to click "View All" to see full list of assets



Transfer request

Custodian

Asset Description

Current Asset details

Asset Transfer Request

Riaaz Dockrat
Acer Ci5 laptop + 4Gb Ram upgr
Use this page to indicate if an asset is lost, stolen, or not managed by you. Complete the Activity Type section and click Submit. The Transfer Request will be sent to your manager for review.

Asset Details

Asset ID 00000410321
Asset Tag Number 913445
Serial Number 913445
Location ADMIN 3-61: OFFC
Responsible OU 00036 Information Technology Service
Custodian Riaaz Dockrat

Activity Type

Select the appropriate activity. For Transfer Asset, enter information in the Location, Department, and Custodian fields as applicable.

Transfer Asset
Date of Transfer (example: 12/31/2000)
Location
Department
Custodian

Asset Lost or Stolen
Date Lost or Stolen (example: 12/31/2000)

Asset Not Assigned to Me
Date Reported (example: 12/31/2000)

Comments

Submit [Return to My Assets List](#) Send Email to Approval Manager

Select the "Activity Type":

Transfer Asset – Notification to update Asset Information

Asset Lost or Stolen – Notification of lost or stolen assets (normal procedure must still be followed)

Asset Not Assigned to Me – Notification that asset wrongly allocated to custodian and current custodian do not have the correct information. (Last resort)

Enter comments regarding, for example: case number for a stolen asset



05 Electronic Asset Removal Permit

Basics of asset removal

Functionality Available

- “Create New Permit Request”
 - Create and submit new request for an Asset Removal permit.
 - “Review / Change / Close Request”
 - View the information and status of a request,;
 - Minor changes before the request is approved.
 - Delete not yet approved requests
 - Renew Request
 - Close request
 - “Print / Email Approved Request”
-

“

Assets (including laptops, iPads, tablets or other electronic equipment) may not be removed from the University’s premises without prior official approval from the relevant line manager and Asset Management. [A03/12]

”



Navigation to “Asset Removal System”

The screenshot displays the 'Asset Self Service' interface. On the left is a navigation pane with a menu containing: 'View Asset Info', 'Asset Depreciation', 'Verification and Transfers', 'Cancel Pending Asset Transfer', 'Asset Removal', 'Create New Permit Request', 'Review/Change/Close Request', 'Print / Email Approved Permit', 'Manager Approvals', and 'Asset Physical Transfer'. The 'Asset Removal' menu item is highlighted. The main content area is titled 'Asset Self Service' and 'Asset Removal Request'. It includes a search bar for 'Empl ID' with the value '24009904' and a magnifying glass icon. Below the search bar is an 'Add' button. A 'collapse' icon (two vertical bars) is located between the navigation pane and the main content area.

Click on “Asset Removal”

Specify the person requesting the removal permit. **Note** that if the asset is not allocated to you as the custodian specified, you will not be able to apply for an asset removal permit. A request can be created on behalf of the custodian of the asset by a delegate. Click “Add”

Click on the *collapse* icon  to hide or view the side pane



Capture an Asset Removal Request

Specify the department code or use the lookup function.

Select the assets applicable to the request. Only assets that the user is a custodian of, will be listed here. Assets marked as "Existing Permit" cannot be reapplied for, the existing permit must first be "closed" or expire before a new permit can be applied for.

Assets with a cost less than R5 000 will not be reflected, if needed add the asset information for which a permit is required. Click on the "+" to add more lines for assets.

Assets purchased recently that is not yet updated can also be added here.
NB: Permit may not be for longer than 1 month

Employee Self Service Asset Self Service

Removal Request

Asset Removal Request

Request id: NEXT
Empl ID: 04653476
*Resp OU: 07081 Asset and Insurance Management

Select Assets for the same address

Assets with cost over R5000 Find | View All | First 1-2 of 2 Last

Selection Flag	Business Unit	Asset Identification	Asset Description	Tag Number	Serial ID	Existing Permit
1 <input type="checkbox"/>	UP000	000000028954	LG735EA - HP Elitebook 8560P	813547	5CB14937FQ	<input type="checkbox"/>
2 <input type="checkbox"/>	UF000	000000423933	Value PC (UF005110)	927930		<input type="checkbox"/>

Select All Un-select All

Assets not yet marked or reflected above and/or cost under R5000 Personalize | Find | First 1 of 1 Last

Selected Flag	BU	Asset Identification	Description	Tag Number	Cost under R5000
1 <input type="checkbox"/>					<input type="checkbox"/>

If the asset is not available to select and the "Existing Permit" box is ticked, it means that there is already a permit (can be on some-one else's name, or not yet expired)



Capture an Asset Removal Request

Complete the address details where the asset will be kept. If the asset will be kept at the “HR address” then the address fields do not have to be completed.

An asset could be removed by a 3rd party in certain instances, for example, an external company removing an asset for maintenance or a UP student requiring an asset for use for offsite research.

The box for 3rd Party Information will expand

Complete the information required. This information will be displayed on the Asset Removal Permit

Provide a reason or motivation for removing the selected assets. This information will be displayed to Asset Management for review and the line manager for approval, but will not be printed on the Asset Removal permit.

Details

From Date To Date

Asset being kept at custodian's home address as per HR records?
If this asset is not being kept at your primary HR address, then you will be required to add relevant address information of where the asset is being kept:

Address Info

Country South Africa

Address 1

Address 2

Address 3

Address 4

City

County Postal

State

Is this Removal Request on behalf of a 3rd Party?

▶ 3rd Party Information

Is this Removal Request on behalf of a 3rd Party?

▼ 3rd Party Information

Capacity

Name and Surname / Company Name:

Student Nbr / ID Nbr / Staff Nbr:

Comment/Reason:

Submit Request



Navigation to “Review/Change/Close Request”

This function is used to:

- View the information and status of a request;
- Minor changes before the request is approved.
- Delete not yet approved requests
- Renew Request
- Close request

Click on “Review / Change / Close Request”

The screenshot displays the 'Asset Self Service' interface. On the left, a navigation pane lists various options, with 'Review/Change/Close Request' selected and highlighted in green. The main area shows the 'Review Asset Removal Request' page, which includes a search section with the following fields:

- Request Id: begins with []
- Empl ID: begins with 24009904
- Removal Request Status: = []

Buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' are located below the search fields.

Enter you request ID, or leave blank and search based on user ID



Functionality available

Requests can be deleted, if not yet approved

Requests can be renewed

Request status can be viewed

To manually close the request, the request will automatically close on the expiry date of the request.
The close date is auto populated.

Employee Self Service | Asset Self Service

Review/Update

Review Asset Removal Request

Request Id: 011355 | Empl ID: 01298992 | Fourie, Susan-Mariette | Request Status: Approved

*Resp OU: 07081

Buttons: Delete Request | Renew Request | Close Request

Business Unit	Asset ID	Tag Number	Description	Existing Permit
1 UP000	000000427792	930987	HP Probook 450 CI5 with bag an	<input checked="" type="checkbox"/>

Request Details

From Date: 01/12/2020 | To Date: 01/12/2021 | Closed Date: [Auto-populated]

Asset being kept at custodian's home address as per HR records? Cancelled

Address Info

Country: ZAF | South Africa

Address 1: []
Address 2: []
Address 3: []
Address 4: []
City: []
County: [] | Postal: []
State: []



Delete and renew requests

Review Asset Removal Request

Request Id: 011355 Empl ID: 01298992 Fourie,Susan-Mariette Request Status: Approved

*Resp OU: 07081 Delete Request Renew Request Close Request

Business Unit	Asset ID	Tag Number	Description	Existing Permit
1 UP000	000000427792	930987	HP Probook 450 C15 with bag an	<input checked="" type="checkbox"/>

Request Details

From Date: 01/12/2020 To Date: 01/12/2021 Closed Date:

Asset being kept at custodian's home address as per HR records? Cancelled

Address Info

Country: ZAF South Africa

Address 1:

Address 2:

Message

NEW Removal request and submit for approval. (22000,368)

Use the hyperlink to go to the Change/Review page. When you save your changes, you can submit the new request for approval automatically.

OK

Review Asset Removal Request

Request Id: 011355 Empl ID: 01298992 Fourie,Susan-Mariette Request Status: Approved

*Resp OU: 07081 Delete Request Renew Request Close Request Go to New Request

Business Unit	Asset ID	Tag Number	Description	Existing Permit
1 UP000	000000427792	930987	HP Probook 450 C15 with bag an	<input checked="" type="checkbox"/>

To **delete** a request click on the "Delete Request" button. Only requests not yet approved can be deleted.

To **renew** a request click on the "Renew Request" button.

A message will be displayed confirming that the request was copied.

A new request number will be generated and a link will be provided to navigate to that new request.

The new request will still need to be submitted.



Navigation to “Print/Email Request”

This function is used reprint or email a permit of an approved request

Click on “Print/Email Approved Request”

The screenshot displays the 'Asset Self Service' interface. On the left, a navigation menu is open, showing options such as 'View Asset Info', 'Asset Depreciation', 'Verification and Transfers', 'Cancel Pending Asset Transfer', 'Asset Removal', 'Create New Permit Request', 'Review/Change/Close Request', 'Print / Email Approved Permit', and 'Approve Removal Permit Request'. The 'Print / Email Approved Permit' option is highlighted in green. A red arrow points from this menu item to the main content area. The main content area is titled 'Print Asset Removal Request' and includes a search section with a 'Find an Existing Value' button, a 'Search Criteria' dropdown, and input fields for 'Request Id' (beginning with) and 'Empl ID' (beginning with 24009904). Below the search fields are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A red arrow points from the search input fields to a text box on the right.

Enter you request ID, or leave blank and search based on user ID

Note: Once the request is approved by Asset Management and the Line Manager, the Permit is automatically emailed to the requester



Reprint / email an asset removal permit

Print and email buttons are available at the top of the approved asset removal request

Print – opens the permit in a PDF format

Email – opens a box that allows for a user to capture an email address to send the permit to

Print Removal Request

Review Asset Removal Request

Request Id 000031 Empl ID 01298992 Fourie,Susan-Mariette Request Status Approved

*Resp OU: 01991

Personalize | Find | First 1-3 of 3 Last

Business Unit	Asset ID	Tag Number	Description
1 UP000	000000409098	TEST003	FILING CABINET
2 UP000	000000416610	XXX222	test asset
3 UP000	000000417875	ABC	SF test

Request Id: 000031

To: susan.fourie@up.ac.za

Email & Return Cancel



Example of PDF permit


UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

Department of Finance

2010-03-14

Ref: Request 001

Created by: Riaaz Dockrat

To whom it may concern,

REMOVAL OF UP ASSET/S FROM UP CONTROLLED ENVIRONMENT

Permission is hereby granted to Riaaz Dockrat (Personnel number: 24009904), or 3rd party (if indicated), to remove the following UP asset/s from a UP controlled campus for official purposes:

ASSET ID	DESCRIPTION	TAG NUMBER	SERIAL ID
000000000009	Acer Aspire i3 laptop	000000	NXML000000

Riaaz Dockrat takes full responsibility for the asset/s and safeguarding thereof.

This letter is valid until 2010/06/30.

Approving Supervisor: Marietjie de Waal

Enquiries may be directed to Asset Management (assets@up.ac.za).

Regards,

Manager: Asset Management
(This document is electronically generated and no signature is required)



Navigation to “Approve Asset Removal Request”

The screenshot displays the 'Asset Self Service' interface. On the left, a navigation menu includes 'View Asset Details', 'Verification and Transfers', 'Asset Removal', and 'Manager Approvals'. The 'Approve Asset Removal Request' option is highlighted in green. The main content area is titled 'Removal Req Approval' and 'Approve Asset Removal Requests'. It features a 'Summary' section with instructions and search criteria fields for 'Request Id' and 'Employee ID'. Below these fields are 'Search' and 'Clear' buttons. A message states 'No search results were found.' Below this is a table with columns: 'Select', 'Request Id', 'Empl ID', 'Name', 'From Date', 'To Date', 'Date Submitted', and 'Resubmit Date'. The table contains one row with 'Request Id' in the 'Request Id' column. Below the table are 'Select All' and 'Unselect All' links, and 'Approve', 'Deny', and 'Pushback' buttons.

Click on search, for all outstanding approvals to be displayed



Approval of permit requests

Removal Req Approval

Approve Asset Removal Requests

Summary

To locate assets that require your approval, edit the criteria below and click the Search button.

Request ID:

Employee ID:

To view the complete details, click the Request id link.

Request Details | Approver Comments |

Select	Request Id	Empl ID	Name	From Date	To Date	Date Submitted	Resubmit Date	Supervisor ID	Name	Custodian Comment	AM Approver
<input type="checkbox"/>	000017	01250604	Ramakuwela,Zwitavhathu Simon	2017/04/10	2017/04/12	2017/04/10		P1298992	Fourie,Susan	presentation	P1250604
<input type="checkbox"/>	000019	04652372	Rithuri,Lethabo Mary	2017/04/11	2017/04/30	2017/04/10		P1298992	Fourie,Susan	Meeting	P1250604
<input type="checkbox"/>	000034	04652372	Rithuri,Lethabo Mary	2017/04/11	2017/04/12	2017/04/11		P1298992	Fourie,Susan	yes	P1298992
<input type="checkbox"/>	000035	04652372	Rithuri,Lethabo Mary	2017/04/11	2017/04/11	2017/04/11		P1298992	Fourie,Susan	Y	P1298992

[Select All](#) [Unselect All](#)

Click on the request ID to view details and comment on the request

Tick the requests to approve then click on "Approve"

If not approve, the manager selects the request to deny or pushback, click on "Approver Comments", enters a comment, and then clicks on "Deny" / "Pushback"

Note:

When a request is pushed back the requester can make changes to the information (except adding assets) and resubmit.
When a request is denied, the requester has to re-apply for a new permit.



06 Electronic Physical move function

Basics of electronic asset move function

Functionality Available

- “Add/Update Request”
 - Create and submit new request for the physical movement of assets between locations, or to the Used Assets Store
 - Update existing request if not yet finalised, and view the details
- “Approve Request”
 - Approval by requester Line Manager
- “Review Physical Transfer Request”
 - View the information and status of a request,;
 - View the supporting document for the transfer



Navigation to “Asset Transfer Request System”

Click on “Asset Physical Transfer”

Specify the person requesting the physical transfer of assets.
Note: the requester must be a permanent UP staff member.
Click “Add a New Value”
Click “Add”

Click on the *collapse* icon to hide or view the side pane



Capture an Asset Physical Transfer Request

Use the lookup function to select the location where the assets must be collected.

Specify the assets that must be collected.
Note: If the asset is not listed, the collection team may not move the asset.

Use the lookup function to lookup the asset AI or Tag number, or complete the tag number. The description will auto populate as on the asset register.

Assets with a cost less than R5 000 will not be available to specify in the above method. To request asset transfer in this case, remove the "Asset listed on PS?" tick and complete all the available information.

Asset Self Service

UP Transfer Request

UP Asset Transfer Request

Request Id: NEXT Approval Status: Initial
Requester: P1265851 Fransa Bingle Request Status:
Tel Nr: 012 420 4653
Email ID: fransa.bingle@up.ac.za

Location where asset must be collected: 🔍

Select "Asset listed on PS" for assets on the asset register.
Unselect "Asset listed on PS" for assets under R5000 and NOT on the assets register.

Asset Details: View All | 1 of 1

Asset listed on PS?	BU	Asset ID	Tag Number	Description
1 <input checked="" type="checkbox"/>	UP000 🔍	<input type="text"/> 🔍	<input type="text"/> 🔍	

Click on the "+" to add more lines for assets.



Capture an Asset Physical Transfer Request (continue)

Move assets to the following location, etc

Used Asset Store: 0434100000

OR

Location To: 

Custodian To: 

Department To: 

Comments:

Date Scheduled:

Select the destination of the asset to be collected.

If the assets are not moved to the “Used Asset Store”, complete the “location”, “Custodian” and “Department” by using the lookup function.

Click “Save and Submit”

The request will now be reviewed by Asset Management, then sent to the Requester’s line Manager for approval. Insurance Management will then Schedule the move, and an email will be sent to the Requester.



Asset Physical Transfer Request - Approval by Line Manager

Click on "Asset Physical Transfer"

The screenshot shows the 'Asset Self Service' interface. On the left, a navigation pane lists various options, with 'Approve Physical Trf Request' highlighted in green. A red arrow points from a text box to this menu item. The main content area is titled 'Approve Physical Trf Request' and includes a search section with the following elements:

- Buttons: 'Find an Existing Value' and 'Add a New Value'
- Section: 'Search Criteria' (expanded)
- Fields: 'Request ID' (dropdown: 'begins with'), 'User ID' (dropdown: 'begins with', value: 'P4288971'), and 'Requester' (dropdown: 'begins with')
- Checkbox: 'Case Sensitive' (unchecked)
- Buttons: 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'

Below the search section, there are more 'Find an Existing Value' and 'Add a New Value' buttons. A red arrow points from a text box to the 'Search' button.

Click "search" to display all pending requests.

Click on the *collapse* icon to hide or view the side pane



Asset Physical Transfer Request - Approval by Line Manager (continue)

UP Transfer Request

UP Asset Transfer Request

Request Id: 000029 Approval Status: Submitted
Requester: P4341280 Petra Ackerman Request Status: Submitted
Tel Nr: 012 420 5668
Email ID: petra.ackerman@up.ac.za

Location where asset must be collected: 0400100011 AE DU TOIT 2-PASG1: WALKWAY

Asset Details: View All | (2) 1 of 1

UP Asset?	BU	Asset ID	Tag Number	Description		
1	<input checked="" type="checkbox"/>	UP000	000000000158	785231	ROLL 45 CE ROLLABILITY: 45CMNAP	

Move assets to the following location, etc

Redundant Store: 0434100000 -- CORRUGATED IRON STORE

OR

Location To: 0400500012 ADMIN 1-14: ELECTRNC EXCH
Custodian To: 04341252 Gray,Zanda
Department To: 00036 Information Technology Service

Comments:
ASDFASDFAERFWETGHDRR

Date Scheduled:

The Manager review the request, and "Approve" or "Deny".



View Asset Physical Transfer Request details

Click on “Review Asset Physical Transfer Request”

The screenshot displays the 'Asset Self Service' interface. On the left, a navigation pane lists various options, with 'Review Physical Trf Request' highlighted in green. The main content area is titled 'Review Physical Trf Req' and includes a search section with the following fields: 'Request Id' (beginning with), 'Requester' (beginning with 'P4288971'), and 'Request Status' (equals). There is also a 'Case Sensitive' checkbox. Below the search fields are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'. A secondary search section at the bottom of the main area also has 'Find an Existing Value' and 'Add a New Value' options.

Specify the requester and/or the request ID, Click “search”.

Click on the *collapse* icon to hide or view the side pane



View Asset Physical Transfer Request details (continue)

UP Transfer Request | Attachments

UP Asset Transfer Request

Request Id: 000037 Approval Status: Approved
 Requester: P1255851 Fransa Bingle Request Status: Closed
 Tel Nr: 012 420 4653
 Email ID: fransa.bingle@up.ac.za

Location where asset must be collected: 0400100015 AE DU TOIT 2-STEP1: STEPS

Select "Asset listed on PS" for assets on the asset register.
 Unselect "Asset listed on PS" for assets under R5000 and NOT on the assets register.

Asset Details: View All | 1 of 1

Asset listed on PS?	BU	Asset ID	Tag Number	Description
1 <input checked="" type="checkbox"/>	UP000	000000408606	800182	10kg Tumble Dryer Speed Queen

Move assets to the following location, etc:

Used Asset Store: 0434100000
 OR
 Location To: 0440200417 BASCMED SCI 1-1,10: SHAFT
 Custodian To: 01219995 Volschenk, Gabriel
 Department To: 00023 TuksSport UP Funds

Comments:
 test

Date Scheduled: 07/05/2021

UP Transfer Request | Attachments

Physical Transfer Request: File Attachment

Request Id 000037

Attachment Details Personalize | Find | View All | 1 of 1

File Name	Description	User ID	Name 1	Date/Time Stamp
1 flag2.png	location changed to xxxx	P04653476	Mtoboba, Siph	06/05/2021 13:12:08

Add Attachment

Insurance Management Comment:

Return to Search | Previous in List | Next in List

UP Transfer Request | Attachments



Contact:

Asset Management

Update asset information for assets already recorded in the asset register
Asset verification
assetmanss@up.ac.za

Update asset information for newly purchased assets
Asset removal permits
assets@up.ac.za

Physical move of assets to different location (including Redundant store)
assetmove@up.ac.za

Department of Finance

