Assetworks How To: Internal Transfers

Purpose: Moving an asset *within your department*

What can be changed: Building, Room #, Custodian (if they are part of your department), Primary User

What cannot be changed: Anything requiring the asset to move to a different department and moving an item to Surplus

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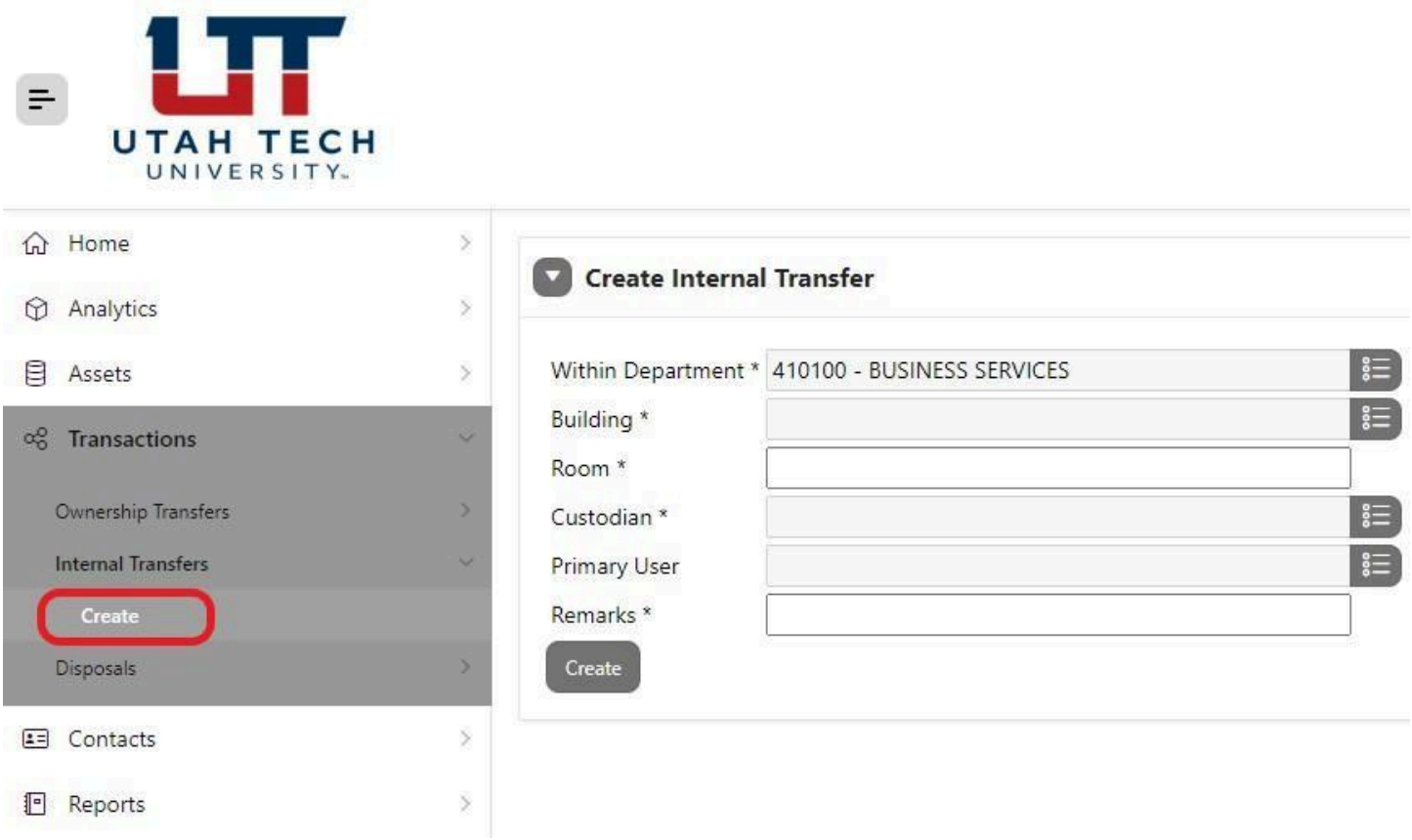
1. Before beginning, you will need to know the item's *Asset ID*, which is a 9-character number beginning with either a 'T' or 'Z' (Ex. T00001234). This is the primary asset identifier used within Assetworks to track an asset and it is NOT the same as the physical tag # located on the device. If you are curious why they are different, send us an email and we'll be glad to explain.
    a. Here is how you figure out the Asset ID, if you don't know: How to Find Asset ID

2. Go to: https://employees.utahtech.edu/property-control-surplus/ , scroll to the bottom and select *Login to Assetworks*. If this is your first time logging in, select the *SSO* option. If at any point in this process you have issues, email fixedassets@utahtech.edu to gain access.
3. On the left side navigation panel, select *Transactions* > *Internal Transfers* > *Create*.



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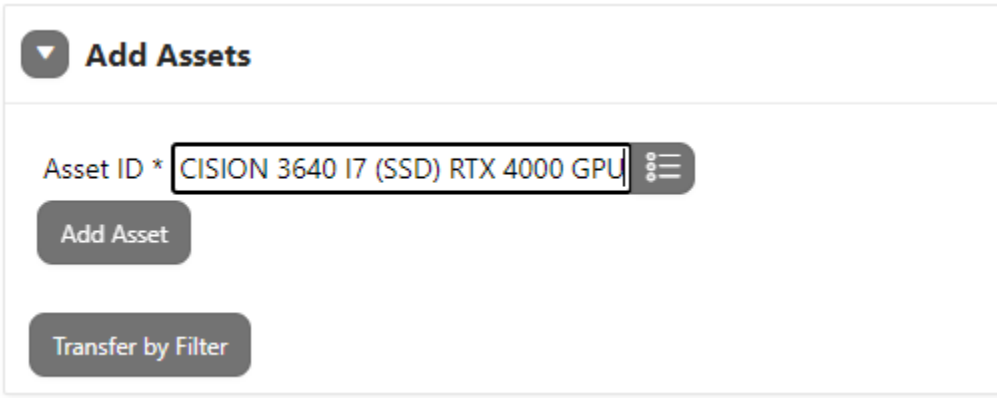
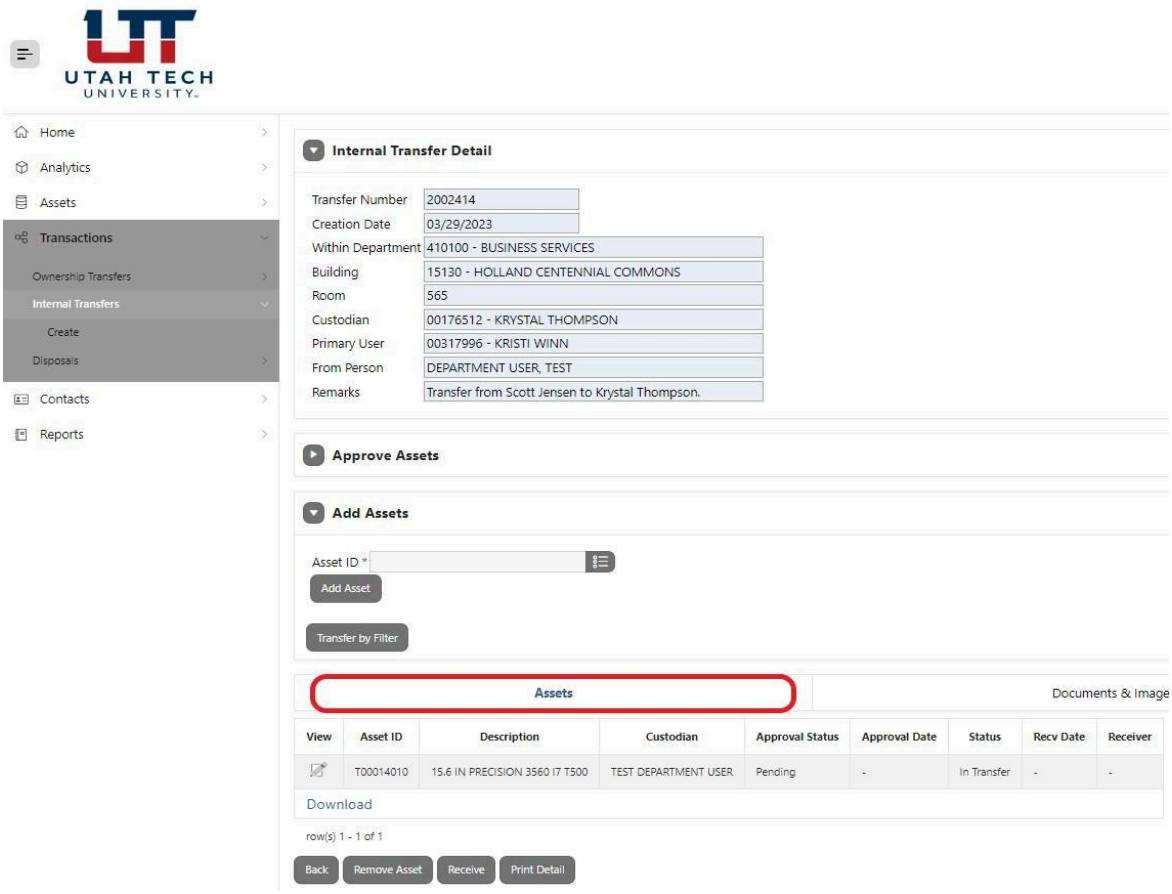
4. Fill out the information about the transfer: Choose Building, Room, Custodian, and Primary User of where the item is being transferred. (Use the list search button on the right if you can't find the correct information) Under *Remarks* write **why** the item is being transferred. You will indicate what item to transfer in the next step. Then, click *Create*.
5. Next, in the *Add Assets* section that appears after you click *Create*, type the Asset ID of the item(s) being transferred to the details you entered above. Need help finding the Asset ID? Asset ID is the digital tag used to track items in Banner and Assetworks. It begins with either a "T" or "Z" and is a different # than the physical tag # on the item.
6. Once you locate the right Asset ID, click *Add Asset* (see below).



7. After you add the asset(s) to the internal transfer, it will appear in the Assets section. There is no "Save" or "Confirm" button to finish this. Once assets are added the receiving custodian will be notified they have a transfer to receive. Need to learn how to receive a transfer? Continue reading below for more options once you have added assets.



8. In the Assets section, there will be two to four buttons at the bottom depending on your permission profile:
    a. Back - Will take you back to the Transfers home screen.
    b. Remove Asset – Will allow to remove an asset(s) from the transfer.
    c. Receive - Will take you to the transfer receive screen (if you are a department approver).
    d. Print Detail - Will print a PDF of the transfer detail.

Congratulations, your internal transfer is now ready to be received!

<u>Troubleshooting:</u>

- I added an asset to my transfer by mistake. How do I remove it?
    - Underneath your list of assets currently attached to the transfer, select *Remove Asset.*
    - In the *Remove Assets* module, choose from the dropdown the asset you want to remove from the transfer



    - Click *Remove Asset*. If you have other assets to add now, select *Add Assets* and repeat the process above.
- I need to receive an asset.
    - How To Receive a Transfer
- I'm not sure where to transfer my item.
    - If the item is unneeded and needs disposed, look at this tutorial: How to Transfer to Surplus If you are attempting to transfer the asset to another University employee but don't know their department name, click on *Contacts* on the left navigation pane and search their name. This will identify the department name and number they are in. Note: Department name and number may not reflect their current position on campus, but for the purposes of Assetworks it is sufficient.

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