

PantherSoft Financials 9.0

Asset Management



Table of Contents

| | |
|--|----|
| Employee Self Service (ESS) - Transferring/Viewing an Asset | 4 |
| Employee Self Service (ESS) - Reporting Lost or Stolen | 6 |
| Employee Self Service (ESS) - Surplusing an Asset..... | 7 |
| Manager Self Service (MSS) - Viewing Department Assets..... | 9 |
| Manager Self Service (MSS) - Approving Asset Transfer | 10 |
| Manager Self Service (MSS) - Approving Assets Lost or Stolen | 11 |
| Manager Self Service (MSS) - Approving an Asset to be Surplused..... | 12 |

- Trouble logging in?
- Which Browser can I use?
- FAQs
- Need additional training guides?



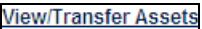

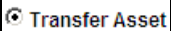


All Flow Charts, Business Processes, and UPKs (User Productivity Kit) can be found for all modules at:

panthersoft.fiu.edu/financials

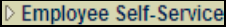



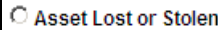
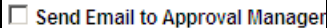
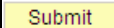
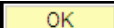

Contact psfin@fiu.edu for further assistance. For additional information, please continue to visit this website and panthersoft.fiu.edu/financials

Employee Self Service (ESS) - Transferring/Viewing an Asset

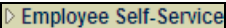

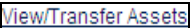
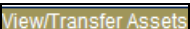

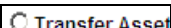

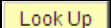


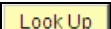
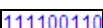
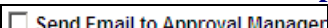
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| 1. | <p>What is an Asset?</p> <p>A. Accountable Property – Tangible, movable, personal property with a value of \$1000 or more and which has a normal expected life of one year or more.</p> <p>B. "Attractive" Property – Accountable property, but is less than \$1000 in value. Items include: VCR's, cameras, printers, monitors, etc. items valued less than \$1000. This list is submitted yearly to the Office of Environmental Health & Safety.</p> <p>C. Computers Software and Related Equipment –Valued at \$1000 or more are listed in the property record with a special code. Items include: monitors, modems, disc drives, etc.</p> <p>Off Campus Use</p> <p>1. Property may be used off campus only if for the use of the University. Such removal shall be authorized by the Department's Accountable Budget Officer and an Off Campus Form shall be furnished to Property Control for accountability.</p> <p>*Off Campus form: http://finance.fiu.edu/controller/Docs/offcampus.pdf</p> |
| 2. | <p>Click the Employee Self- Service link.</p> <p></p> |
| 3. | <p>Click the Assets link.</p> <p></p> |
| 4. | <p>Click the View/Transfer Assets link.</p> <p></p> |
| 5. | <p>Locate the asset you wish to transfer.</p> <p>Click the Transfer button.</p> <p></p> |
| 6. | <p>Asset ID: System Assigned number</p> <p>Asset Tag Number: FIU tag number assigned by Property Control.</p> |
| 7. | <p>Click the Transfer Asset option.</p> <p></p> |
| 8. | <p>Enter the desired information into the Date of Transfer field. Enter a valid value e.g. "04/02/2009".</p> |
| 9. | <p>Click the Look up Location (Alt+5) button.</p> <p><input type="checkbox"/></p> |
| 10. | <p>Select the Description value.</p> <p>Enter the desired information into the begins with field. Enter a valid value e.g. "w10c".</p> |
| 11. | <p>Click the Look Up button.</p> <p><input type="text"/></p> |
| 12. | <p>Select the Location Code.</p> |


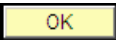

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| 13. | <p>Click the Look up Department (Alt+5) button.</p> <p>For assets associated with a Project ID, please enter into the Department field the Organizational Department ID for the project. Run the following query to identify the Organizational Department for a particular Project ID: FIU_GL_DEPT_PROJ_LOOKUP <input type="checkbox"/></p> |
| 14. | <p>Select or Add a Department number. Press [Enter].</p> |
| 15. | <p>Click an entry in the Department column. <input type="text"/></p> |
| 16. | <p>Click the Look up Custodian (Alt+5) button. <input type="checkbox"/></p> |
| 17. | <p>Enter the desired information into the begins with field. Enter a valid value e.g. "1186353".</p> |
| 18. | <p>Click the Look Up button. <input type="text"/></p> |
| 19. | <p>Click an entry in the Employee ID column. <input type="text"/></p> |
| 20. | <p>Enter comments if your department requires justification for the transfer.</p> |
| 21. | <p>Check this box to send an e-mail to your Approval Manager.</p> |
| 22. | <p>Click the Submit button. <input type="text"/></p> |
| 23. | <p>Click the OK button. <input type="text"/></p> |
| 24. | <p>Click an entry in the Status column. <input type="text"/></p> |
| 25. | <p>Click the scrollbar.</p> |
| 26. | <p>You can view the status of the transfer in this section.</p> |
| 27. | <p>You can transfer another asset if you: Click the Return to My Assets List link. <input type="text"/></p> |
| 28. | <p>Click the Home link. <input type="text"/></p> |
| 29. | <p>Congratulations. You have successfully completed Requesting Transferring an Asset. End of Procedure.</p> |

Employee Self Service (ESS) - Reporting Lost or Stolen

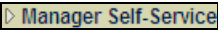

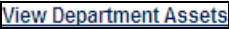

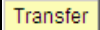


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|-----|---|
| 1. | Click the Employee Self- Service link.  |
| 2. | Click the Assets link.  |
| 3. | Click the View/Transfer Assets link.  |
| 4. | Click the Transfer button.  |
| 5. | Click the Asset Lost or Stolen option.  |
| 6. | Enter the desired information into the Date Lost or Stolen field. Enter a valid value e.g. " 04/15/2009 ". |
| 7. | Click the scrollbar. |
| 8. | Enter the desired information into the Comments field. Enter a valid value e.g. " Laser printer stolen from my car at BBC while teaching. Police report filed an ". |
| 9. | Click the Send Email to Approval Manager option.  |
| 10. | Click the Submit button.  |
| 11. | Click the OK button.  |
| 12. | Click the Home link.  |
| 13. | Congratulations. You have successfully completed reporting your lost or stolen asset. End of Procedure. |

Employee Self Service (ESS) - Surplusing an Asset




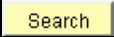

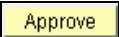


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|-----|---|
| 1. | Click the Employee Self- Service link.  |
| 2. | Click the Assets link.  |
| 3. | Click the View/Transfer Assets link.  |
| 4. | Click the View/Transfer Assets link.  |
| 5. | Click the Transfer button.  |
| 6. | Click the Transfer Asset option.  |
| 7. | Enter the desired information into the Date of Transfer field. Enter a valid value e.g. " 04/21/2009 ". |
| 8. | Click the Look up Location (Alt+5) button.  |
| 9. | Use 0W070100 1 for all assets to be surplused. Enter the desired information into the begins with field. Enter a valid value e.g. " 0w070100 1 ". |
| 10. | Click the Look Up button.  |
| 11. | Click an entry in the Location Code column.  |
| 12. | Click the Look up Department (Alt+5) button.  |
| 13. | You can use a partial department number to look up Surplus Warehouse. Enter the desired information into the begins with field. Enter a valid value e.g. " 111100 ". |
| 14. | Click the Look Up button.  |
| 15. | Click an entry in the Department column.  |
| 16. | Click in the Comments field. |
| 17. | Enter the desired information into the Comments field. Enter a valid value e.g. " Surplus: water damage ". |
| 18. | Click the Send Email to Approval Manager option.  |

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| 19. | Click the Submit button.  |
| 20. | Click the OK button.  |
| 21. | Click the Home link.  |
| 22. | Congratulations. You have successfully completed requesting an asset to be surplusd. End of Procedure. |




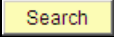
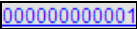
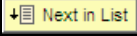
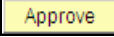
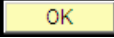

Manager Self Service (MSS) - Viewing Department Assets

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| 1. | Click the Manager Self- Service link.  |
| 2. | Click the Assets link.  |
| 3. | Click the View Department Assets link.  |
| 4. | Click an entry in the Department column.  |
| 5. | Click the scrollbar. To view all your assets for this department number, scroll down to the bottom of the page. |
| 6. | You can view asset details or you can transfer an asset from this page. Click the Transfer button.  |
| 7. | To transfer an asset, fill out the proper fields and click the submit button on the bottom of the page. Click the scrollbar. |
| 8. | To continue to view your Department's assets. Click the Return to My Assets List link.  |
| 9. | Click the Home link.  |
| 10. | Congratulations. You have successfully viewed your Department's Assets. End of Procedure. |

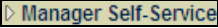

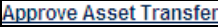
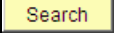
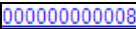
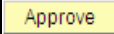
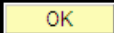

Manager Self Service (MSS) - Approving Asset Transfer

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|-----|---|
| 1. | <p>Click the Manager Self- Service link.</p>  |
| 2. | <p>Click the Approve Asset Transfer link.</p>  |
| 3. | <p>Click the Asset Identification cell.</p> <p>Select contains from the table menu.</p>  |
| 4. | <p>If you know the Asset Identification number you can use this field. If you do not know the Asset ID number, simply click search. Enter the desired information into the begins with field. Enter a valid value e.g. "2219".</p> |
| 5. | <p>Click the Search button.</p> <p>This will search for any existing Asset Transfer requests that contain the digits 2219.</p>  |
| 6. | <p>Click the 00000002219 link.</p> <p>Select the desired link to be brought to the Asset Transfer Approval page.</p>  |
| 7. | <p>Click the Vertical scrollbar.</p> <p>Move the scroll bar down.</p> |
| 8. | <p>Click the Approve button.</p>  |
| 9. | <p>Click the OK button.</p> <p>Notice how the Approval Process has one more entry showing the approver with an updated Status and Submit Date.</p>  |
| 10. | <p>Click the Home link.</p>  |
| 11. | <p>Congratulations. You have successfully approved an Asset Transfer. End of Procedure.</p> |

Manager Self Service (MSS) - Approving Assets Lost or Stolen

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| 1. | Click the Manager Self- Service link.  |
| 2. | Click the Assets link.  |
| 3. | Click the Approve Asset Transfer link.  |
| 4. | Click the Search button.  |
| 5. | Click an entry in the Asset Identification column.  |
| 6. | Click the scrollbar. |
| 7. | Click the Next in List button.  |
| 8. | Click the scrollbar. |
| 9. | Click the Approve button.  |
| 10. | Click the OK button.  |
| 11. | Click the scrollbar. |
| 12. | Notice: Once you have approved this transaction, the buttons are grayed out. |
| 13. | Click the Home link.  |
| 14. | Congratulations. You have successfully completed Approving Assets that were Lost or Stolen. End of Procedure. |

Manager Self Service (MSS) - Approving an Asset to be Surplused

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| 1. | Click the Manager Self- Service link.  |
| 2. | Click the Assets link.  |
| 3. | Click the Approve Asset Transfer link.  |
| 4. | Click the Search button.  |
| 5. | Click an entry in the Asset Identification column.  |
| 6. | Click the scrollbar. |
| 7. | Click the Approve button.  |
| 8. | Click the OK button.  |
| 9. | Click the scrollbar. |
| 10. | Notice: Once you have approved this action, the buttons are grayed out. |
| 11. | Click the scrollbar. |
| 12. | Click the Home link.  |
| 13. | Congratulations. You have successfully approved sending an asset to surplus. End of Procedure. |