

How to Approve an Asset Transfer

This request is for items that have an asset tag assigned to them. A request is sent to the principal or department head for initial approval and then to the receiving school's principal or department head for the final approval.

- You can access the request by email or logging in to PeopleSoft. The email will look like this:

The asset transaction submitted needs approval.
https://psweb12.palmbeach.k12.fl.us:8003/psp/FNUPOA/EMPLOYEE/ERP/c/PB_MENU_PB_AM_DISPOSAL_APR_GBL?Page=PB_AM_DISP_APPR01&Action=U&DATE_SUBMITTED=2016-11-30&DTM_STAMP=2016-11-30-10.31.17.000000&ORIGINATOR_ID=TELF AIR&PB_AM_REQ_TYPE=T

(This message was automatically generated by Form and Approval Builder on 2016-11-30 at 10.51.10.000000. Please do not reply to this email.)

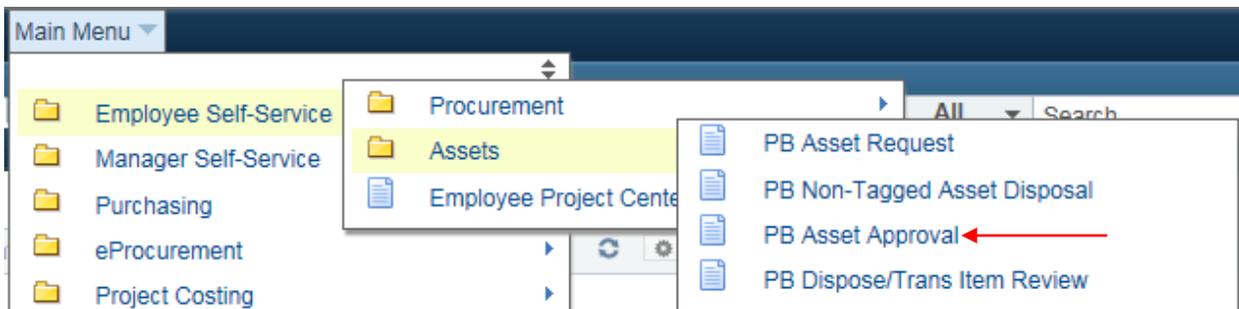
1. Log in to PeopleSoft



2. On the Homepage, click on the Financials tile



3. Navigate to: Main Menu → Employee Self-Service → Assets → PB Asset Approval



4. Select Transfer from the *Request Type* dropdown menu and then click Search.
 - a. You may refine your search by adding a date or originator username if you wish.



PB Asset Approval

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

Find an Existing Value

▼ Search Criteria

Originator: begins with

Date Submitted: = 31

Date/Time Stamp: =

Request Type: =

User ID: begins with

Case Sensitive

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

5. Select the transaction from the list that you would like to review.

Search Results

View All First 1-2 of 2 Last

Originator	Date Submitted	Date/Time Stamp	Request Type	Location Code
1108184	11/29/2016	11/29/2016 8:54:49AM	Transfer	1491
MCCRAYS	11/29/2016	11/29/2016 11:01:32AM	Transfer	1491

- a. You will now be taken to the approval page.
- b. Check the white box to the left of the items to select.

Originator

Originator: MCCRAYS Stephon McCray Department 1491
 Date Submitted: 11/29/2016
 Request Type: Transfer
 Asset Location: 1491 Boca Raton Middle
 Location To: 1821 Christa McAuliffe Middle

Approve All Deny All Remove Selected Item(s)

Transaction Details

Approval Status	Asset ID	Description	Tag Number	Category	Serial ID	Net Book Value	Cost	Comments	Detail
<input type="checkbox"/> 1 Pending	000000033786	BOOK SHELVING DBL-FACED 60X24	AD7491	FFE	NONE		1273.950		Detail
<input type="checkbox"/> 2 Pending	000000033922	BOOK SHELVING DBL-FACED 60X24	AD7492	FFE	NONE		2116.460		Detail
<input type="checkbox"/> 3 Pending	000000033923	BOOK SHELVING DBL-FACED 60X24	AD7493	FFE	NONE		2116.460		Detail
<input type="checkbox"/> 4 Pending	000000033981	CREDENZA MEDIUMM OAK	AD7226	FFE	NONE		1100.000		Detail

Approval Comments

Return to Search Notify Refresh

- c. If you have multiple assets on your list, you can use the Remove Selected Item(s) button to remove certain items from the list if you do not want them approved/denied. Removing the items sends it back to the originator. Be sure to write a comment in the comment box as to why you removed it.
 - i. You can only approve all of the assets in the list or deny all of the assets in the list. You cannot pick and choose an approval/denial for different assets.
 - If you only check the box on one asset and there are four on the list, **all** 4 of them will be approved or denied if you don't use the remove button to remove the others.
 - d. Denying the asset(s) will send the request back to the originator. Be sure to include a comment in the comment box to tell the originator why you have denied their request.
 - e. Approving the asset(s) will send the request to the receiving school's/department's head approver.
6. The receiving school/department will have a different approval process. After the department head at the originating school/department approves the transfer, the receiving department head will get an email notifying them of an asset transaction that needs to be reviewed.
 - a. The approve all and deny all functions works the same as in the previous step. You may remove items you don't want to approve/deny and then approve all or deny all the remaining assets.
 - b. If you scroll over to the right, you will see fields for **Building No, Room No, Assigned To, and Custodian** (Last Name,First Name of a valid employee)
 - i. You must enter all of this information for every asset in the list in order to approve the transfer.

PB Asset Approval

Originator

Originator:	TELFAIR	Maria Telfair	Department	9100
Date Submitted:	11/30/2016			
Request Type:	Transfer			
Asset Location:	9100	Accounts Payable Dept		
Location To:	1491	Boca Raton Middle		

Transaction Details

Asset Information

	Approval Status	Asset ID	Description	Tag Number	Category	Serial ID	Net Book Value	Cost	Comments
<input type="checkbox"/>	1 Pending	000000168948	TIME CLOCK	DB7241		031229			
<input type="checkbox"/>	2 Pending	000000168960	TIME CLOCK	DB7253		030088			
<input type="checkbox"/>	3 Pending	000000174088	TIME CLOCK	DB7270		037635			

Approval Comments

Personalize | Find | First 1-3 of 3

Building No	Room No	Assigned To	Custodian	Detail	Redistribution	Redistribute Reason	Attachments
				Detail			<input type="button" value="Attachments"/>
				Detail			<input type="button" value="Attachments"/>
				Detail			<input type="button" value="Attachments"/>

- Once you finish entering the information, select either Approve All or Deny All and then scroll down to the bottom to make sure the transfer completed.

DATE_SUBMITTED=2016-11-30, DTTM_STAMP=2016-11-30-10.31.17.000000, ORIGINATOR_ID=TELFAIR, PB_AM_REQ_TYPE=T:Approved

Asset Transfer

Approved
 ✓ Nancy Samuels
 AM Department Head
 11/30/16 - 10:51 AM

Approved
 ✓ Peter Slack
 DEPT HEAD AT RECEIVING LOCAT
 11/30/16 - 3:31 PM