# 2023

# Fixed Assets Transfer Request Manual





**Distribution Services Department** 

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# **Argos Fixed Assets Reports**

Argos Reports will allow you to run the Physical Inventory report and conduct asset verification of all **silver tag items**.

- Reports can be exported to an Excel Format where it can be filtered to display specific data
- Reports can also be viewed in PDF Format

#### Login to Argos

• Under Jagnet Home/Employee Apps/Argos.



• Select the Fixed Assets Folder





#### **Physical Inventory Reports**



- **Physical Inventory by A# (updated)** To view physical inventory report by searching with the Custodian A# or the Equipment/Financial Manager A#.
- **Physical Inventory by Campus\_Bldg\_Custodian** It will search for inventory by campus, by campus building, and campus building and cust.
- Physical Inventory by Serial Number It will search for inventory asset by serial number
- Physical Inventory by Tag It will search for inventory by asset number
- Physical Inventory by Tag History It will search for inventory history by asset number
- Physical Inventory Locations It will search for location codes by campus

#### **Physical Inventory Reports – Pending Approvals**



- Pending Moves Approvals It will search for Move/Setup by request number
- Pending Approvals NonInventory Assets It will search for transfers by Equipment Manager username
- Pending Approvals with Orig. Asset Info It will search for transfers by Equipment Manager username
- Proxy Date It will search for proxy list by Equipment Manager username

# Physical Inventory by A# (updated)

Fixed Assets/Physical Inventory Reports

- The reports include:
- Custodian User ID and Name
- Equipment Manager ID and Name
- PTAG Permanent Asset Number
- ORGN. Department/Program Organization Code
- POHD Purchase Order Number
- Asset Description, Silver Tag, Serial Number, Location Code and Title
- Acquisition Date, Asset Total, Barcode Number: Green (Grant) Tag or Security Theft Tag Number

#### By Custodian A#: Enter the complete Custodian A#. and Click to Run twice



#### By Equipment Manager A#: Enter the complete Custodian A#. and Click to Run twice

South Tex	kas College			Ph	nysica	ıl Inve	entory Report					
		Ento	Enter Cus	stodian A OR nt Mar A	#:	A00000	0039 Cavazos	s, Rebecca - A00	0000039			
				J		Asse	Click to Run					
CUST ID	CUST NAME	EQUI ID	EQUI NAME	PTAG	ORGN	POHD	ASSET DESC	SILVER TAG	SERIAL NO	LOCN	LOCN TITLE	ACOD DT
A00010250 A00010250 A00010250 A00010250	Quintanilla, Gerardo Quintanilla, Gerardo Quintanilla, Gerardo Quintanilla, Gerardo Quintanilla, Gerardo	A00000039 A00000039 A00000039 A00000039 A00000039	Cavazos, Rebec Cavazos, Rebec Cavazos, Rebec Cavazos, Rebec Cavazos, Rebec	000000622 000000654 000000781 000000783 000000791	420005 420005 420005 420005 420005	P602789 P700568 P602643 P602643 P602643	Heampden Transformer Kit w/Storage Case Art 499 Sildes Sat #965 History/Janson Hampden H:RT-II Industrial Refrigeration Tra Hampden Art Conditioning Control Unit Hampden H:ACD-I Conditioning Demonstrati	32297 25508 0000000781 000000783 0000000781	N/A N/A 67327 66641 67328	3 1 1 1	Asset Not Found Asset Not Found TC SR Warehou TC SR Warehou TC SR Warehou	11/09/1996 10/31/1996 10/16/1996 10/16/1996

#### How to run report in Excel Format

- Select the icon shown at the bottom right side of the report
- Export All to CSV





• Report will be displayed at the bottom left side of the screen



Save report in Excel Format

#### How to run report in PDF Format

- Select the down arrow shown at the top left section of the report
- Click Generate report in PDF Format



• Then, click on Run



Report will be displayed at the bottom left side of the screen



# Sample Reports

• Physical Inventory by Campus

South Texc				Ph	ysical	Inven	tory Report						
	Select	Campus:											
	Sciect	cumpus.											
	FTVLOC	N_LOCN FTVLOCN_1	TITLE										
	15	Pecan Plaza	a Bldg A	A									
	20	Pecan Plaza	a Bldg B and C										
	25	Koma High	SChool	chir									
	30	Rio Grando	City High Sch	ool									
	35	Nursing an	d Allied Health	Car									
	40	Technology	Campus										
	45	Starr Count	ty Campus										
	50	Mid Valley	Campus										
	55	Pecan Cam	pus										
	65	Hidalgo Tra	nining Center										
	66	Boys & Girl	s Club McAller	1									
	67	PSJA Colleg	je Career & Te	ch A									
	68	Robert Vela	a High School (	Edir									
	4	Called Older	r Hann Schulan	- F									
	37 items	, 1 selected		0									
							Assets OuickView	,					
							Assets QuickView	,					
PTAG	CUST_ID	CUST_NAME	EQUI_ID	EQUI_NAME	ORGN	POHD	Assets QuickView	SILVER_TAG	SERIAL_NO	LOCN	LOCN_TITLE	ACQD_DT	TOTAL_COST
PTAG 000000001	CUST_ID A00438781	CUST_NAME Walters, Lisa	EQUI_ID A00438781	EQUI_NAME Walters, Lisa	ORGN 530013	POHD	Assets QuickView	SILVER_TAG	SERIAL_NO N/A	LOCN 553566	LOCN_TITLE PCN Bldg F Rm 117	ACQD_DT 08/31/1995	TOTAL_COST 14543.2
PTAG 000000001 000000611 000000612	CUST_ID A00438781 A00438781 A00438781	CUST_NAME Walters. Lisa Walters. Lisa	EQUI_ID A00438781 A00438781	EQUI_NAME Walters, Lisa Walters, Lisa	ORGN 530013 530013	POHD	Assets QuickView	SILVER_TAG 25711 25712 25713	SERIAL_NO N/A N/A	LOCN 553566 553566	LOCN_TITLE PON Bidg F Rm 117 PON Bidg F Rm 117 PON Bidg F Rm 117	ACQD_DT 08/31/1995 08/31/1995	TOTAL_COST 14543.2 55522.91 40430.13
PTAG 000000001 000000611 000000612 0000001019	CUST_ID A00438781 A00438781 A00438781 A00438781	CUST_NAME Walters. Lisa Walters. Lisa Walters. Lisa	EQUI_ID A00438781 A00438781 A00438781 A00438781	EQUI_NAME Walters, Lisa Walters, Lisa Walters, Lisa	ORGN 530013 530013 530013 530013	POHD 24810	Assets QuickView ASST_DESC Ubray books for PY1995 Libray books for PY1995 Libray books for PY1993 - The Nursing Asst. Series	SILVER_TAG 25711 25712 25713 000000208	SERIAL_NO N/A N/A N/A	LOCN 553566 553566 553566 553566	LOCN_TITLE PCN Bldg F Rm 117 PCN Bldg F Rm 117 PCN Bldg F Rm 117 PCN Bldg F Rm 117	ACQD_DT 08/31/1995 08/31/1995 08/31/1995 08/31/1993	TOTAL_COST 14543.2 55522.91 40430.13 804
PTAG 000000001 000000611 000000612 000001019 000001033 000001161	CUST_ID A00438781 A00438781 A00438781 A00438781 A00438781 A00438781	CUST_NAME Walters. Lisa Walters. Lisa Walters. Lisa Walters. Lisa Walters. Lisa Generica bene	EQUI_ID A00438781 A00438781 A00438781 A00438781 A00438781	EQUI_IVAME Walters, Lisa Walters, Lisa Walters, Lisa Walters, Lisa Galaters, Lisa Galaters, Lisa	ORGN 530013 530013 530013 530013 530013 530013	POHD 24810 4-80470	Assets QuickView ASET_DESC Ubray bools for FY1955 Ubray bools for FY1956 Ubray bools for FY1956 Ubray bools for FY1959 Ubray bools for FY1959 - The Varing Asts. Series On Sector Descept Hadrine Unit	51LVER_TAG 25711 25712 25713 0000000208 000000147 0000001425	SERIAL_NO N/A N/A N/A 396745	LOCN 553566 553566 553566 553566 553504 553504	LOCN_TITLE PCN Bldg F Rm 117 PCN Bldg F Rm 117 PCN Bldg F Rm 117 PCN Bldg F Rm 117 PCN Bldg F Rm 115 PCN Bldg F Rm 115	ACQD_DT 08/31/1995 08/31/1995 08/31/1993 08/31/1993 08/31/1993	TOTAL_COST 14543.2 55522.91 40430.13 804 3025 1419
PTAG 00000001 00000611 00000612 000001019 000001033 000001161 000001249	CUST_ID A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A00038781	CUST_NAME Walters_Lisa Walters_Lisa Walters_Lisa Walters_Lisa Gorozalez_Jone Lopes_Myriem	EQUI_ID A00438781 A00438781 A00438781 A00438781 A00438781 A00001239 A00001645	EQUI_NAME Walters. Lisa Walters. Lisa Walters. Lisa Walters. Lisa Gonzalez. Jose Lopez. Myriem	ORGN 530013 530013 530013 530013 520004 410013	POHD 24810 4-80470 P703665 N/A	Assets QuickView Statues User basis for F1996 Libery basis for Gaset Sile AL 19 Devis Signer Statues Register	SILVER_TAG 25711 25712 25713 00000000208 000000147 0000001253 0000000003	SERIAL_NO N/A N/A 396745 N/A 95030045	LOCN 553566 553566 553566 553566 553504 557014 557555	LOCN_TITLE PCN Bidg F Rm 117 PCN Bidg F Rm 117 PCN Bidg F Rm 117 PCN Bidg F Rm 117 PCN Bidg F Rm 115 PCN Bidg M Rm 116 PCN Bidg M Rm 116 PCN Bidg M Rm 138	ACQD_DT 08/31/1995 08/31/1995 08/31/1993 08/31/1993 08/31/1993 08/31/1993	TOTAL_COST 14543.2 5552.241 40430.13 804 3025 1619 255 1619
PTAG 00000001 000000611 000000612 000001019 000001019 000001161 000001249 000001249	CUST_ID A00438781 A00438781 A00438781 A00438781 A00438781 A0001239 A00001239 A00001645 A00001577	CUST_NAME Walters. Liss Walters. Liss Walters. Liss Walters. Liss Gonzalez. Jone Lopez. Myriam De La Garza, Rcando	EQUI_ID A00438781 A00438781 A00438781 A00438781 A00438781 A0001239 A00001645 A0000016	EQUE_NAME Walters. Lisa Walters. Lisa Walters. Lisa Walters. Lisa Walters. Lisa Gonzalez. Jose Lopez. Myrilem Reed. Shrifey	ORGN 530013 530013 530013 530013 530013 530013 520004 410013 441000	POHD 24810 4-80470 P703665 N/A Land Land	Assets QuickView Ass. Ass. Ass. Ass. Ass. Ass. Ass. Ass.	SILVER_TAG 25711 25712 25713 0000000208 0000000147 0000001253 0000000003 21163	SERIAL_NO N/A N/A 396745 N/A 9500045 N/A	LOCN 553566 553566 553566 553566 553566 553566 553566 553566 553566 553566 553566 553566 553566 553566 553566 553566	LOCN_TITLE PON Bidg F Rm 117 PON Bidg F Rm 117 PON Bidg F Rm 117 PON Bidg F Rm 117 PON Bidg F Rm 116 PON Bidg M Rm 116 PON Bidg M Rm 116 PON Bidg M Rm 138 Pears Campus and	ACQ0_DT 00/31/1995 00/31/1995 00/31/1993 00/31/1993 00/31/1993 00/31/1993 00/31/1995 00/32/1995	TOTAL_COST 14543.2 5552.91 40400.13 804 3025 51519 2549 515780 515780
PTAG 000000001 000000612 00000103 00000103 00000103 000001161 000001249 000001608 000001909	CUST_ID A00438781 A00438781 A00438781 A00438781 A000438781 A00001645 A00001577 A00033948 A00438781	CUST_NAME Walters_Liss Walters_Liss Walters_Liss Walters_Liss Gonzake_Jose Lopez_Myrism De La Garza, Ricardo Hughes, Marc Walters_Liss	EQUI_1D A00438781 A00438781 A00438781 A00438781 A00438781 A00001239 A000010 A00433948 A00433948	EQUT_NAME Wahers. Liss Wahers. Liss Wahers. Liss Wahers. Liss Wahers. Liss Gonzakz. Jose Lopez. Myriem Reed, Shriey Hughes. Marc Wahers. Liss	ORGN 530013 530013 530013 530013 530013 520004 410013 441000 223023 530013	24810 4-80470 P703665 N/A Land P703505	Assets QuickView Ass., 1995 Using holds for 1995	SILVER_TAG 25711 25712 25713 0000000208 000000147 000000147 0000001253 00000001249 21163 21163 21164	SERIAL_NO N/A N/A N/A 395745 N/A 95030045 N/A N/A N/A	LOCN 553566 533566 533566 553506 553504 55755 55 55 557240 553566	LOCN_TITLE PCN Bidg F Rm 117 PCN Bidg F Rm 117 PCN Bidg F Rm 117 PCN Bidg F Rm 117 PCN Bidg F Rm 135 PCN Bidg F Rm 138 PCN Bidg F Rm 138 PCN Bidg F Rm 138 PCN Bidg F Rm 138 PCN Bidg F Rm 138	ACQ0_DT 08.11/1996 08.11/1996 08.131/1995 08.131/1993 08.131/1993 08.131/1993 06.031/1997 06.031/1997 06.031/1997	TOTAL_COST 14543.2 55522.91 40430.13 804 3025 1615 2549 2549 2549 57288 3255 57288.49
PTAG 00000001 000000611 000000612 000001019 000001033 000001161 000001608 000001608 000001929 000001929	CUST_ID A00438781 A00438781 A00438781 A00438781 A00438781 A00001239 A00001577 A00433948 A00433948 A00433781 A00433781	CUST_NAME Walters. Lisa Walters. Lisa Walters. Lisa Walters. Lisa Gonzalez. Jose Lopez. Myriam De La Garza, Ricardo Hughas, Lisa De La Garza, Ricardo De La Garza, Ricardo	EQUI_ID A00438781 A00438781 A00438781 A00438781 A00038781 A00001239 A0000010 A00433948 A00438781 A0000010	EQUL_NAME Webers. Liss Webers. Liss Webers. Liss Webers. Liss Gonzaker. Jose Lopez. Myriem Read, Shringy Hughes. Marc Webers. Liss	ORGN 530013 530013 530013 530013 530004 441000 243023 530013 530013 441000	POHD 24810 4-80470 p703655 N/A Land p703505 p702442	Assets QuickView Ass. 2017 Ass.	SILVER_TAG 25711 25712 25713 0000000208 0000001253 000000003 21163 0000001249 21440 21164	SERIAL_NO N/A N/A N/A N/A 9503045 N/A N/A N/A N/A N/A N/A	LOCN 553566 553566 553566 553566 553566 553566 557014 557014 55755 55 55 55 55 55 55 55 55 55 55 55	LOON_TITLE PON Bidge Fem 117 PON Bidge Fem 117 PON Bidge Fem 117 PON Bidge Fem 117 PON Bidge Fem 138 PON Bidge Fem 138 PON Bidge Fem 138 PON Bidge Fem 138 PON Bidge Fem 137 Pons Generation	ACQ0_DT 00/31/1995 00/31/1995 00/31/1995 00/31/1993 00/31/1993 00/31/1995 00/05/1995 00/31/1997 00/31/1997	TOTAL_COST 14543.2 55522.91 40430.13 804 3025 1619 2549 535788 3255 57288.49 361544.07
PTAG 00000001 000000611 000000612 000001033 000001161 000001249 000001608 000001909 000001909 000001929 000001929 000001930 000002036	CUST_ID A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A00031239 A00001645 A00001577 A00433948 A00031577 A00433948	CUST_JIANE Waters_Liss Waters_Liss Waters_Liss Waters_Liss Gonzaikz_Tose Lopez_Mriters De La Gorzs_Ronzto De	EQUI_ID A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A0001239 A000010 A0043781 A0004545 A00043956 A0000010 A00043956	EQUL_NAME Wahers, Lisa Wahers, Lisa Wahers, Lisa Wahers, Lisa Wahers, Lisa Gonzalez, Jose Lopez, Myriem Reed, Shringy Hughes, Nare Wahers, Lisa Med, Shring Lisa Med, Shring Lisa Reed, Shring Lisa	ORGN 530013 530013 530013 530013 530013 530013 530014 441000 223023 530013 530014 441000 223021 530013 530014 441000	POHD 24810 4-80470 P703665 N/A Land P703505 P702442 P801957 Building	Assets QuickView Ass. 2017 Bury book for 11985 Bury book for 11985 B	SILVER_TAG 25711 25712 25713 25713 25713 25713 00000002149 00000001437 0000001437 21163 0000001437 21164 0000001437 21269	SERIAL_NO N/A N/A N/A 396745 N/A 95030045 N/A N/A N/A N/A N/A N/A	LOCN 553566 553566 553566 553566 553566 557014 557014 55755 55 557240 553566 553566 553566 555555 5555555555	UON, TTHE POI Bidg F Rn 117 POI Bidg F Rn 117 POI Bidg F Rn 117 POI Bidg F Rn 117 POI Bidg N Rn 115 POI Bidg N Rn 118 POI Bidg N Rn 118 POI Bidg T Rn 138 POI Bidg T Rn 138 Po	ACQ0_DT 06,31/1995 06,31/1995 06,31/1995 06,31/1993 06,13/1993 06,03/1997 06,03/1997 06,03/1997 06,03/1997 06,03/1997 06,03/1997 06,03/1997	TOTAL_COST 14543.2 5552.2 91 40430.13 3025 5157 5157 5157 5157 5157 5157 5157 51
PTAG 00000001 000000611 000000612 00000103 00000103 000001249 000001920 000001929 000001929 000001929 000001929 000001279 000001279 000001279 000001279 000001279 000001279 000001279 000001279 000001279 000001279 000001279 000001279 000001279 000001279 000001279 000001279 000001275 0000001275 000001275 000001275 000001275 000001275 000000000000000000000000000000000000	CUST_ID A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A00038781 A00001577 A00001577 A000438781 A000438781 A000438781 A000438781 A000438781 A000428241	CUST_NAME Waters_Liss Waters_Liss Waters_Liss Waters_Liss Uoses_Mylane Lopes_Mylane De La Garcs_Roardo Hughes_Marc Waters_Liss Garcs_Roardo De La Torce_Sonia Modelb_George Corpus_Liss	EQUI_1D A00438781 A00438781 A00438781 A00438781 A00438781 A00001239 A00001239 A0000010 A00438781 A0000010 A00438781 A0000010	EQUL_NAME Webers. Liss Wabers. Liss Wabers. Liss Wabers. Liss Genaide. Jose Lopes. Myriam Report. Liss Report. Liss Report. Liss Read. Shrifey Carvance. Maria Read. Shrifey Corpus. Liss	ORGN 530013 530013 530013 530013 530013 530013 530013 530013 441001 2423023 530013 441000 221301 441000 221301	POHD 24810 4-80470 P703665 N/A Land P703505 P702442 P601557 Building P802557	Assets QuickView Ass. Control of the second	SILVER_TAG 25711 25712 25712 25713 0000000246 0000001243 21163 0000001249 21440 21144 0000001497 23029 000001524	SERIAL_NO N/A N/A N/A N/A N/A N/A N/A N/A N/A N/A	LOCN 553566 553566 553566 553566 553566 553556 55755 55 557740 55356 55 55 55 55 55 55 55 55 55 55 55 55 5	LOCU, TTLE POI 166 F Rm 117 POI 166 F Rm 118 POI 166 F Rm 118 POI 166 F Rm 113 POI 166 F Rm 113	ACQ0_DT 08/31/1995 08/31/1995 08/31/1995 08/31/1993 08/31/1993 08/31/1993 08/31/1995 08/57/1997 08/31/1995 08/31/1995 08/31/1995 08/31/1996 08/31/1996	T0TAL_COST 14643.2 55522.9 404 904 1619 2549 253788 233788 233788 233788 233788 233788 23358 23358 2344.07 4455.34 4455.35
PTAG 00000001 000000611 000000611 000001019 000001031 000001040 000001608 000001929 00000190 0000000000	CUST_ID A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A0001249 A00001545 A00001577 A00433948 A00001577 A00433948 A0000042 A0033949 A0000042	CUST_VAME Walters_Liss Walters_Liss Walters_Liss Corradic_Jones De Ls Garas_Roade De Ls Garas_Roade Huphen_Marc Walters_Liss De Ls Garas_Roade De Ls Garas_Roade Corpos_Liss Corpos_Liss Corpos_Liss Corpos_Liss	EQUILID A00438781 A00438781 A00438781 A00438781 A00438781 A00000129 A00000145 A00000145 A000001645 A000001645 A000001645 A000001645 A000001645 A000001645 A000001645 A000001645 A000001645 A00000164 A0000010 A0000010 A0000010 A0000000000	EQUI_NAME Waters. Lisa Waters. Lisa Waters. Lisa Waters. Lisa Waters. Lisa Gonzake. Jose Lopez. Myriam Read. Shringy Canaonana, Maria Read. Shringy Canaonana, Maria Canaonana, Maria Canaona, Maria	ORGN 530013 530013 530013 530013 530013 530013 530004 441000 223023 530013 441000 223023 441000 223021 223021 222001 222001 222001	POHD 24810 4-80470 P703665 N/A Land P703505 P702442 P801957 Building P802577 P802072 P802072	Assets QuickView Assets Control of the set	SILVER_TAG 25711 25712 25712 25712 25712 25712 25712 25712 25712 25712 25712 25712 25712 21163 0000001249 21164 0000001249 21164 0000001249 21164 0000001252	SERIAL_NO N/A N/A N/A N/A N/A 95030045 N/A N/A N/A N/A N/A N/A N/A N/A N/A 9568 M/A/39563 Tatypeol	LOCN 553566 533566 533566 533566 533504 557555 55 55 55 55 55 55 55 55 55 55 55	LOCK_TITLE POI 1865 F Bn 117 POI 1865 M Bn 116 POI 1865 M Bn 116 POI 1865 F Bn 129 POI 1865 F Bn 129	ACQD_DT 08,121,1995 08,131,1995 08,131,1995 08,131,1995 08,131,1995 06,051,1995 06,051,1995 06,051,1995 08,127,1997 00,123,1995 08,131,1995 04,08,1999	T0TAL_C05T 14543.2 55522.34 4040.13 804 3025 1619 53788 53788 53788.49 351544.07 4555.24 41812.44 41812.44 1301.9
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PFAG           00000001           000000612           00000612           000001031           000001146           000001906           000001906           000001906           000001907           000001907           000001907           000001907           000001206           000001207           000001216           000001216	CUST_ID A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A00001239 A00001239 A00001577 A000438781 A	CUST_VAME Walters_Liss Walters_Liss Walters_Liss Walters_Liss Gorsales_Jone Gorsales_Jone De La Gorsa, Ricordo De La Gorsa, Ricordo De La Torns, Sonia McGalès, George Gronz, Liss McGalès, George Gronz, Liss McGalès, George Gronz, Liss McGalès, George Gronz, Liss McGalès, George McGalès, George Gronz, Liss McGalès, George McGalès, Ge	EQUIT_LD A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A0043856 A00032311 A0043856 A00031501 A0043856	EQUIL NAME Waters Liss Waters Liss Waters Liss Waters Liss Grossike Jone Loops Myrian Grossike Jone Loops Myrian Grossike Jone Red Shriny Cornares, Maria Corpo, Luis Barroso, Lazoo Cornacts, Maria Cornacts, Maria	ORGN 530013 530013 530013 530013 530013 530013 530013 441000 441000 441000 421001 441000 421001 421000 421001 222001 222001 222001 222001 222001	POHD 24810 4-80470 p703665 N/A Land p703505 P702442 P801957 P801057 P802072 P802072 P802075 P8020	Assets QuickView Assets QuickView Mark 1993 Asset Asset of P1993 Asset Asset Asset Asset Asset Asset Asset Asset Asset Asset Asse	SLVER_TAG 25711 25712 25713 25713 25713 25713 25713 25713 2000000147 000000147 2000001479 2000001479 2000001479 2000001470 2000001470 2000001472	SERIAL_NO N/A N/A N/A 396745 N/A 95030045 N/A N/A N/A N/A N/A N/A N/A N/A N/A N/A	LOCN 553566 553566 553566 553566 553566 553504 557720 55555 55552 555556 555556 555556 555556 55556 555556 55556 55556 55556 55556 55556 55556 55556 55556 55556 55556 55556 55556 55556 555556 55556 555556 555555	LOCK_TITLE POI 8645 F Bn 117 POI 8645 F Bn 117 POI 8645 F Bn 117 POI 8645 F Bn 117 POI 8645 F Bn 118 POI 8645 F Bn 118 POI 8645 F Bn 118 POI 8645 F Bn 128 POI 8645 F Bn 128 P	ACQ0_0T 00,711,995 00,711,995 00,711,995 00,711,995 00,711,995 00,711,995 00,711,995 00,711,995 00,711,997 00,	T0TAL_COST 14543.2 55522.34 4040.13 5055 5159 515788 51578 51578 51578 51578 51578 51578 51578 51578 515788 51578 5
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PTAG           00000001         00000001           00000001         000000611           000000109         00000119           000001109         000001141           000001161         000001199           000001161         000001199           000001190         000001190           0000012056         000002107           0000021216         000002216           0000022216         0000022216           0000022216         0000022216           0000022216         0000022216           0000022216         0000022216           0000022216         0000022216	CUST_ID A0048781 A0048781 A0048781 A0048781 A0048781 A0049781 A0001278 A00001278 A00001278 A00001278 A00001278 A00001278 A00001278 A00012778 A00012778 A00012778 A00012778 A00012778 A00012777 A00012777 A00012777 A00012777 A00012777 A00012777 A00012777 A00012777 A000127777777777777777777777777777777777	CutT Jawe Water, Lis Water, Lis Water, Lis Granue, Lis Berger, Lis Des Granue, Jon Des Granue, Jon Des Grane, Jon Des Grane, Jon Des Grane, Lis Water, Lis Des Grane, Lis Conse, Lis Conse, Lis Des Libors, Son Die Jors, Son	EQUIL_ID A00438781 A00438781 A00438781 A00438781 A00038781 A0003128 A0003128 A0003128 A00031845 A00039781 A00031959	EQUI, WHE Wahers, Lia Wahers, Lia Wahers, Lia Wahers, Lia Wahers, Lia Good, Mylan Rad, Shriye, Carlon Rad, Shriye, Carlon Rad, Shriye, Carlon Corpora, Lia Corport, Min Corport, Min Corport, Min Corport, Min Corport, Min Corport, Lia Corport, Min Corport, Min Corport, Min Corport, Lia Corport, Min Corport, Min Corport, Min Corport, Min Corport, Lia	ORON 530013 530013 530013 5300013 5300013 5300013 5300013 241000000000000000000000000000000000000	POHD 24810 4-80470 9703642 1and 9703505 9702442 980355 9804077 980555 980555 980555 980555 980555 980555 980555 980555 980555 980555 980555 980555 980555 980555 980555	Assets QuickView Assets Control of the second of the seco	581/487, TAG 25711 25713 25713 0000000147 000000147 21163 000001470 21000 2100001477 21002 2100001477 200001477 000001473 000001731 0000001731 0000001731 0000001731 0000001771 0000001771 0000000000000	SERIAL,NO NIA NIA NIA NIA 384745 NIA 9500045 NIA NIA NIA NIA NIA NIA NIA NIA NIA 110521 110521 110521 110521 110521 110521 110525 110521 110525 1105555 1105555 1105555 1105555 11055555 11055555 110555555 11055555555	LOCN 553566 553566 553566 553566 553556 553556 553556 553556 553556 555515 555515 555515 555515 555515 555515 555515 555515	LOCH_TITLE POIL Bigs F Rn 117 POIL Bigs F Rn 119 POIL Bigs F Rn 129 POIL Bigs F RN	ACQC_0T 08.31.1996 09.31.1996 09.31.1996 09.31.1990 09.31.1990 09.01.1990 09.	T07AC057 1494.3.2 5552.2.9.1 3454.3.2 1419 3025 1419 2139 2139 2139 2139 2139 2139 2139 21
PTAG           00000001         0000001           00000011         00000511           00000115         00000115           0000015         00000115           00000150         00000115           00000159         000001156           000001595         000001295           000001205         000002205           000002216         000002216           000002216         000002216           000002216         000002216           000002216         000002216           000002216         000002216           000002216         000002216           000002216         000002216           000002216         000002216           000002216         000002216           000002216         000002216           000002216         000002216           000002216         000002216	CUST_ID +00487781 +00487781 +00487781 +00487781 +00487781 +00487781 +00487781 +00487781 +00487781 +00481784 +00481784 +00481784 +00481781 +0048178	Out June E Wahrs, La Wahrs, La Wahrs, La Wahrs, La Grant J, La Hold J, Grant J, La Hold J, Jone S, Sha Li J, The S, Sha D Li J, The S, Sha	EQUILID A00-438781 A00-4378781 A00-4378781 A00-4378781 A00-43781 A	EQUI, MARE Waters, Los Waters, Los Waters, Los Waters, Los González, José González, José Logo, Hyrien Waters, Los Martin, José Waters, Los Carolates, Maria Generates, Maria Generates, Maria Generates, Maria Generates, Maria Carolates, Maria	060N 530013 530013 530013 530013 530013 530014 44000 210023 44000 210023 21000 210001 2100000000	24810 4.89470 P70365 N/A Land P70505 P70505 P70505 P8050510 P8050500 P8050500 P8050500 P8050500 P8050500 P8050500 P8050500 P8050500 P8050500 P8050500 P8050500 P8050500 P8050500 P8050500 P8050500 P8050500 P80505000 P8050500 P80505000 P8050500 P805000 P805000000000000	Assets QuickView	SILVER, 746 25711 25711 25713 000000147 000000147 000000147 2146 000000147 2146 00000152 2146 00000152 2146 00000152 2146 00000152 2146 00000170 20000152 200000170 20000170 20000170 20000170 20000170 20000170 20000170 20000170 20000170 20000170 20000170 20000170 20000170 200000170 20000170 200000170 200000170 200000170 200000170 200000170 200000170 200000170 200000170 200000170 200000170 2000000170 2000000170 20000000000	SERAL, NO NA NA NA 394745 NA NA NA NA NA NA NA NA NA NA NA NA NA	LOCN 553566 553566 553566 553566 553556 553556 553556 553556 553556 553556 553556 553556 553556 553515 553555 553555 55555 555555 555555 555555	LOCILITILE POI 1605 F Pn 117 POI 1605 F Pn 128 Pen Pn 129 Pen Pn	ACQ2_DT 08.311.1596 09.311.159	T0TA_C005T 1454.13.1 5040.13 804 3025 3025 3025 3025 3025 4059.13 30258.49 30258.49 30258.49 30258.49 30258.49 30258.49 30258.49 30258.49 30259.14 1088.02 1089.02 1099.02 1099.02 1099.02 1099.02 1099.02 1099.02 1099.02 1099.02 1099.02 100000000000000000000000000000000000
PTAG           00000001         000000611           000000612         000001193           000001193         000001149           000001149         000001149           0000011930         000001206           0000001216         000001206           0000001216         000001216           0000001216         0000001216           0000002126         0000002126           0000002120         0000002127           0000002210         0000002210           00000022270         0000002276           0000002276         0000002276	CLFT_ID A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A00438781 A00045781 A00001577 A00015781 A00001577 A00015781 A00001577 A00015781 A00001577 A00015781 A00001577 A00015781 A00001577 A00015781 A00001577 A00015781 A00015981 A0	Cut T, NAME When Lis When Lis When Lis Granue Lis Granue Lis Granue Lis Mort Lis Display for Mort Lis Display for Display for Dis	EQULD Another and a second sec	EQUI, WHE Waters, Liss Waters, Liss Waters, Liss Waters, Liss Waters, Liss Mark, Stringer, Liss Generation, Markowski, Liss Carpon, Lis	060N 50013 50013 50013 50013 50013 50013 50013 50013 44000 220013 50003 50003 50003 50003 220013 221011 22101	POHD 24810 4490470 PY03665 P703655 P70342 P70342 P70342 P703505 P70342 P703505 P70342 P703505 P70342 P70342 P70342 P70342 P70342 P70342 P70342 P703655 P70342 P703655 P705555 P705555 P705555 P705555 P705555 P705555 P705555 P705555 P705555 P705555 P705555 P705555 P705555 P705555 P705555 P705555 P705555 P7	Assets Quickview Assets Constraints of the second	511462, 7440 2571 2571 2571 2571 2571 2571 2571 2571	587.44_NG NA NA NA NA NA NA NA NA NA NA NA NA NA	LOON 553566 553566 553566 553566 553566 553566 553556 555555 555555 5555555 5555555 555555	LOCH_TITLE POI 1865 F fm 117 POI 1865 F fm 118 POI 1865 F fm 118 POI 1865 F fm 118 POI 1865 F fm 118 POI 1865 F fm 117 POI 1865 F fm 117 P	ACQC_0T 08.31,1956 09.31,1956 09.31,1956 09.31,1950 09.31,1950 09.01,11950 09.01,1950 09.01,1950 09.01,1950 09.01,1950 09.01,1950 09.01,1950 09.01,1950 09.01,2950 09.01,2950 09.01,2950 09.01,2950 09.01,2950 09.01,2950 09.01,2950 09.01,2950 09.01,2950 09.01,2950 09.01,2950 09.01,2950 09.01,2950 09.01,2950 09.01,2950 09.01,2950 00.01,29	1074, C037 114413 552133 552134 552143 553 5576 5576 5576 5576 5576 5576 5576

• Physical Inventory by Campus\_Bldg

South Tex				P	nysical	Inven	tory Report							
	Select C	ampus:					Multi-Select Buildir	ng:						
	ETVLOCN I		TI 6					LOCN	CODE					
	15	Pecan Plaza I	Rida A				PCN Bldg A	5510	CODE					
	20	Pecan Plaza I	Bldg B and C				PCN Bldg A Bm 100	55106	7					
	25	Roma High S	chool				PCN Bldg A Rm 101	55100	1		-			
	26	La Joya Jimm	w Carter Teachi				PCN Bldg A Rm 101A	55106	8					
	30	Rio Grande C	ity High School				PCN Bldg A Rm 101B	55106	9					
	35	Nursing and	Allied Health Ca.				PCN Bldg A Rm 101C	55107	0					
	40	Technology (	ampus				PCN Bldg A Rm 102	55100	2					
	45	Starr County	Campus				PCN Bldg A Rm 103	55100	3					
	50	Mid Valley Ca	amnus				PCN Bldg A Rm 104	55100	4					
	55	Pecan Campi	15				PCN Bldg A Rm 105	55100	5					
	65	Hidalgo Train	ning Center				PCN Bldg A Rm 105A	55107	1					
	66	Boys & Girls	Club McAllen				PCN Bldg A Rm 105B	55108	3					
	67	PS1A College	Career & Tech				PCN Bldg A Rm 105C	55108	4					
	68	Robert Vela F	High School (Edi.				PCN Bldg A Bm 106	55100	6					
	70	Valley View H	tigh School	<b>*</b>			PCN Bldg A Rm 107	55100	7					
	4		+				PCN Bldg A Rm 108	55100	8		*			
	37 items, 1 s	selected		0			2,905 items, 1 selected	00100			ø			
							Assets Quic	kView						
PTAG	CUST_ID	CUST_NAME	EQUI_ID	EQUI_NAME	ORGN	POHD	ASSET_DESC		SILVER_TAG	SERIAL_NO	LOCN	LOCN_TITLE	ACQD_DT	TOTAL_COST
N00019988	A00001843	Rodriquez, Simon	A00632894	Sale, Rachel	441000	P0037350	Desk 74P Edge Full Modesty 30x66		14843	N/A	551002	PCN Bidg A Rm 102	12/07/2010	1154.84
N00023603	A00001843 A00001843	Rodriguez, Simon Rodriguez, Simon	A00632894 400632894	Sale, Rachel Sale, Rachel	211001	P0074886 P0125691	3368322 Microsoft Surface Pro 3 Tablet Virtual Reality Classmont - Robotl ab - Pari	k w/Lengun Tabl	24861 48510	045041751653 N/A	551002	PCN Bidg A Rm 102 PCN Bidg A Rm 102	08/05/2015 10:07:	4690
N00036202	A00001843	Rodriguez, Simon	A00632894	Sale, Rachel	211001	P0125691	Virtual Reality Classroom - ClassVR		48511	N/A	551002	PCN Bidg A Rm 102	07/30/2021 3:38:3	3799
N00036292	A00001843	Rodriguez, Simon	A00632894	Sale, Rachel	211001	P0125875	Laptop - Dell - Precision 5550	dans Commu	38723	3W3PZ33	551002	PCN Bldg A Rm 102	08/17/2021	2221.69
N00036863	AU0001843	Kodriquez, Simon	AU0632894	Sale, Kachel	211001	P0129365	DUBGH1 Panasonic Lumix BGH1 Box Mirro	riess Camera	3526/	WH1HA001184	551002	PON Bidg A KM 102	01/20/2022 2:31:0	1//1.19

• Physical Inventory by Campus\_Bldg\_Custodian

South Te	STC exas College			I	Physical	Inve	ntory Report							
	Selec	t Campus:			Mu	lti-Selec	t Building:			Multi-S	elect C	ustodian:		
	ETVI OC				100	TTTLE	LOCN CODE			CUST NAM	IF	CUST ID		
	15	Pocan Pl			DON					Cavazos R	ebecca	A0000039		
	20	Pecan Pi	laza Diug A laza Pida P and (		PCN	BIOG N RIN 1 BIdg N Rm 1	44 337301			Cuvu203, IC		A00000037		
	20	Roma Hi	iata School	<u> </u>	PCN	Bldg N Rm 1	145A 557628							
	25		limmy Carter Te	achir	PCN	Bldg N Rm 1	46 557563							
	20	Bio Gran	do City High Ect	acili	PCN	Bldg N Rm 1	147 557564							
	30	Nurcing	and Allied Healt		PCN	Bldg N Rm 1	L47A 557565							
	33	Technol	and Ameu Heald	ii Ca.	PCN	Bldg N Rm 1	L47B 557566							
	40	Technolo	ogy Campus		PCN	Bldg N Rm 1	L47C 557567							
	45	Starr Co	unty Campus		PCN	Bldg N Rm 1	147D 557568							
	50	Mid Vali	ey Campus	_	PCN	BIdg N Rm 1	L4/E 55/569							
	55	Pecan G	ampus		PCN	BIOG N RIN 1 BIdg N Rm 1	L4/F 33/3/U							
	65	Hidalgo	Training Center		PCN	Bida N Rm 1	40 557572							
	66	Boys & C	Girls Club McAlle	n	PCN	Bldg N Rm 1	150 557573							
	67	PSJA Co	llege Career & Te	ech A	PCN	Bldg N Rm 1	557574							
	68	Robert V	ela High School	(Edir	PCN	Bldg N Rm 1	52 557575							
	70	Vallev V	iow High School		PCN	Bldg N Rm 1	153 557576							
	27 itom	1 colocted			PCN	Blda N Rm 1	557577	•						
	57 items	, i selected		9	2,90	5 items, 1 s	elected	¢		1 item, 1 s	elected		¢	
						A	ssets QuickView							
PTAG	CUST_ID	CUST_NAME	EQUI_ID	EQUI_NAME	ORGN	POHD	ASSET_DESC		SILVER_TAG	SERIAL_NO	LOCN	LOCN_TITLE	ACQD_DT	TOTAL_COST
N00032707	A0000039	Cavazos, Rebecca	A00000039	Cavazos, Rebecca	420007	P0105465	Dell Precision 5820 Tower XCTO Base		30904	4DNPC52	557566	PCN Bidg N Rm 1478	11/29/2018 4:46	5:5 1424.68

#### • Physical Inventory by Serial Number



# • Physical Inventory by Tag

Physica	al Inventor By TAC	y Report		
Enter TAG:	42843			
	Click to Ru	n		
TAG:	42843			
Custodian:	Quintanilla, G	erardo	Cust. ID:	A00010250
Equipment Mgr.:	Cavazos, Rebe	ecca	Equip. ID:	A0000039
ORGN:	420005			
POHD:	P0119628			
Permanent TAG:	N00035146			
Asset Desc:	Dell Latitude !	5310 Laptop 2 in 1	втх	
Serial #:	99KHXZ2			
LOCN:	1	TC SR Warehou	ise - Auction	
Aquired DT:	07/31/2020			
Total Cost:	\$1,175.41			

• Physical Inventory by Tag History

South Texa	STC s College			Physica	al Inventor By TAG HISTC	y Repor	t				
			Enter T	AG:	42843	Run					
					TAG History Quid	ckView					
PTAG N00035146 N00035146	ACT_DATE 03/20/2023 03/21/2023	USER_ID GBARAJAS GBARAJAS	TRANSFER_DT 03/20/2023 03/21/2023	TRANSFER_RSN Transfer to update ass Obsolete items no lon	et location and custodian	POHD P0119628 P0119628	TRANSFER_FROM_ID A00000039 A00000039	TRANSFER_FROM_NAME Cavazos, Rebecca Cavazos, Rebecca	FROM_COAS S	FROM_ORGN 420007 420004	FROM_LOCN 402057 402057

• Physical Inventory Locations

Phys	ical Inventory Locatior	ns Report
Select Ca	ampus:	
FTVLOCN_LO	FTVLOCN_TITLE	
15	Pecan Plaza Bldg A	
20	Pecan Plaza Bldg B and C	
25	Roma High School	
26	La Joya Jimmy Carter Teaching Site	
30	Rio Grande City High School	
35	Nursing and Allied Health Campus	
40	Technology Campus	
45	Starr County Campus	
50	Mid Valley Campus	
55	Pecan Campus	
65	Hidalgo Training Center	
66	Boys & Girls Club McAllen	
67	PSJA College Career & Tech Academy	
68	Robert Vela High School (Edinburg)	
70	Valley View High School	<b>.</b>
71 37 items, 1 se	PS1A High School lected	0
57 items, 1 se	lected	v
Locatio	ns OuickView	
ETVLOCN I		
5510		
551067	DCN Rida A Day 100	
551001	PCN DIUG A KITI 100	
551001	PCN Bldg A KM 101	
551068	PCN Bldg A Rm 101A	
551069	PCN Bldg A Rm 101B	
551070	PCN Bldg A Rm 101C	

• Pending Moves Approvals – Enter Move/Setup Request Number

*	SOUT	H TEXAS Llege	Moves R	eport							
E	nter Req. No:	22238262	Run Report	]							
	REQ_NO 22238262 22238262	APPROVAL_STATUS disapproved pending approval	WORKFLOW_N Non Inventory Non Inventory	WORKFLOW_FORM TransferApprovalForm ConfirmationApprovalForm	REQUESTE 3/20/2023 3/20/2023	APPROVED 3/20/2023	EMP_ID NA NA	MOVE_JUSTIFICATION Transfer items to new loc Transfer items to new loc	EMP_TYPE Assets Assets	SCHED_DATE	EMPCLASS

• Pending Approvals NonInventory Assets – Enter FM username

South 1	Non Inventory Pending Approvals												
			Financial Man	ager (E-mail Userid):	beckyc	(	Click To Run						
				Non Inventory Penc	ling Approvals	QuickView							
ASSET_TAG	MOVE_REQNUM	ASSET_LOCATION	ORIG_ASSET_MGR_USERID	ORIG_ASSET_MGR_NAME	NEW_EQUIP_MGR_USERI	NEW_LOCATION	APPROVER_USERID	APPROVER_NAME Rebecca Cavazo	WORKLIST_OWNER				
9000102316	22231637	TC Bldg D	BECKYC	Rebecca Cavazos	LWALTERS	PCN Bldg F Rm 17	beckyc	Rebecca Cavazo					
N/A N/A	1	TC Bidg D NAH Bidg A Rm 3-34	BECKYC CTELLO3	Rebecca Cavazos Carlos Tello	BECKYC BECKYC	TC Bldg D Shippin TC SR Warehouse	beckyc beckyc	Rebecca Cavazo Rebecca Cavazo					
N/A	ī	PCN Plaza Bldg B R	RSUAREZ8	Ruben Suarez	BECKYC	TC SR Warehouse	beckyc	Rebecca Cavazo	Rebecca Cavazos				
N/A NA	22233565	TC Bldg D Rm 118G TC Bldg D Rm 105	BECKYC BECKYC	Rebecca Cavazos Rebecca Cavazos	CYGARZA BECKYC	PCN Bldg D Rm 10 TC SR Warehouse	beckyc beckyc	Rebecca Cavazo Rebecca Cavazo					

• Pending Approvals with Orig. Asset Info – Enter FM username.

South T	S1 exas C			Pending /	Approval	S			
		Fina	incial Mai	nager (E-mail Use	rid):	beckyc	Click To Run		
			00.01	Pending Appro	vals Quick	<pre></pre>		ODIO ASSET MOD NAME	0010 4000
SILVER_TAG	MOVE_REQ_NUME	SILVER_TAG_DESC	OKGN	OKGN_TITLE	LOCN	LOCN_TITLE	ORIG_ASSET_MGR_USERID	ORIG_ASSET_MGR_NAME	ORIG_ASSE
25485		7D/D3066-74P-F Desk Full Modesty Pa	420005	Inventory Control	1	TC SR Warehouse - Auction	beckyc	Rebecca Cavazos	Gerardo Qu
25485	2223/562	/D/D3066-74P-F Desk Full Modesty Pa	420005	Inventory Control	1	TO SK warehouse - Auction	Deckyc	Kebecca Cavazos	Gerardo Qu
25485	2122122	7D/D3066-74P-F Desk Full Modesty Pa 2D/D2066-74D-E Desk Full Modesty Da	420005	Inventory Control	1	TC SR Warehouse - Auction	DECKYC	Rebecca Cavazos	Gerardo Qu
25485	212214242	70/03066-74P-F Desk Full Modesty Pa	420005	Inventory Control	1	TO SK warehouse - Auction	Deckyc	Rebecca Cavazos	Gerardo Qu
20400	2223/011	7D/D2066-74P-F Desk Full Modesty Pa 7D/D2066-74D-E Desk Full Modesty Pa	420005	Inventory Control	1	TC SR Warehouse - Auction	backyc	Rebecca Cavazos	Gerardo Qui
25485	22238003	7D/D3066-74P-F Desk Full Modesty Pa	420005	Inventory Control	1	TC SR Warehouse - Auction	beckyc	Rebecca Cavazos	Gerardo Qu

• Proxy Date – – Enter FM username

		C	Proxy Dates	
South Texas	s Coll			
		Proxy Date	es QuickView	Click To Run
FINANCIAL_MANAGER	LOGON	PROXY_NAME	DATE_FROM	DATE_TO
Rebecca Cavazos	bordero	Benjamin Borderon	11/05/2021 3:41:15 PM	11/30/2023 6:00:00
Rebecca Cavazos	bbordero	Benjamin Borderon	11/05/2021 3:41:15 PM	12/31/2023 6:00:00
Rebecca Cavazos	daleal	Deyadira Leal	10/28/2013 3:20:53 PM	12/31/2022 6:00:00
Rebecca Cavazos	daleal	Deyadira Leal	10/28/2013 3:20:53 PM	12/31/2023 6:00:00
Rebecca Cavazos	gbarajas	Graciela Barajas	10/19/2012 12:57:29 PM	12/31/2022 6:00:00
Rebecca Cavazos	gbarajas	Graciela Barajas	10/19/2012 12:57:29 PM	12/31/2023 6:00:00
Rebecca Cavazos	jerryq	Gerardo Quintanilla	08/23/2012 6:26:59 PM	12/31/2022 6:00:00
Rebecca Cavazos	jerryq	Gerardo Quintanilla	08/23/2012 6:26:59 PM	12/31/2023 6:00:00
Rebecca Cavazos	jgarcia_1	Jaqueline Garcia	08/05/2016 9:50:33 PM	12/31/2022 6:00:00
Rebecca Cavazos	jgarcia_1	Jaqueline Garcia	08/05/2016 9:50:33 PM	12/31/2023 6:00:00
Rebecca Cavazos	maviia	Maday Avila	08/03/2012 4:58:06 PM	11/1//2013 6:20:56
Rebecca Cavazos	mperez151	Marcos Perez	08/01/2017 9:04:19 PM	12/31/2022 6:00:00
Rebecca Cavazos	ncontre1	Nashla Saenz	05/18/2022 3:48:06 PM	05/19/2023 5:00:00

# **Move/Setup Request for Assets**

#### Purpose

- Moving equipment to a different location within the same department or to a new department / Equipment Manager (Financial Manager).
- Update an asset location and Custodian name (End-User).
- Update a Not Found/Stolen Asset Location Code 3 Internal Update
- Update expired Software/License Location Code 4 Internal Update

Note: These transfers will be reflected in the Argos Physical Inventory Report



Grant Fund Items - Silver Tag and Green Tag (Grant) barcode
 If the item has both tags, use only the Silver Tag to transfer the item.



# FA Mass Transfer (Silver Tags) for Orgn., Location and Custodian

#### Login to Jagnet

• Under Employee/Employee Resources, Select Move/Setup Request



• Select Assets – Silver Tag and Submit

Fixed Assets Move or Setup
Request Move or Setup Type: Assets  Fixed Asset Transfers/Setup  Purple, Green, & No Tag (Includes Furniture) Submit

- FA Mass Transfer form will allow up to 20 silver tags to be transferred or updated.
- All of the items must be transferred to the same Financial Manager, Organization, Location and Custodian Name.

FA Mass Transfer (Silver Tags ) for Orgn, Locn and Custodian								
Move/Setup Request#       22238003       Assets         Manager Requesting       Becky Cavazos - BECKYC       •         Initiator's Phone#       8722787       •         Justification       Transfer to update asset location and custodian								
To Financial Manager *Please enter in the entire tag number *Including leading zeros if any*	Becky Cavazos - BECK *	YC 🗸						
Tag#s	25485	42843						
			]					
Submit								

- The Move/Setup Request# is automatically assigned.
- Select the Financial <u>Manager Requesting</u> the move, relocation or update.
- Fill in a phone number for the person initiating the request. (Do not include any lines between the numbers)
- Fill in the justification for the request. (Ex: condition of asset, transfer to new financial manager, relocation from and to, current location of assets, new location for the assets, etc.)
- Select the <u>To Financial Manager</u> who will receive the asset(s) or maintain ownership.
- Fill in the complete Silver Tag number(s) and Submit form.

Personal Information Student Financial Aid Employee Finance								
Search Go	SITE MAP HELP EXIT							
Confirmation								
✓ Information saved successfully.								
Submit additional Silver Tag Assets								
Submit additional Purple Tag Assets								
Done 🛑								

- After the form has been submitted, the option to submit more transfers is available (see below).
- Click on <u>Done</u> to complete the Jagnet process.

After completing the transfer in Jagnet:

#### Login to Workflow

Banner Workflow will display a Worklist of transfers reflecting the Jagnet submittal (s).

• Under Jagnet Home/Employee Apps/Workflow.



- The Financial Manager or Proxy will have access to review, approve or disapprove Workflow transfers.
  - If the Financial Manager/Proxy does not approve the form within five days, an alert will be displayed and a daily email reminder will be sent to the FM.
- If the Financial Manager is the same person transferring and receiving the asset(s), they will need to approve the following forms in **Banner Workflow Worklist**:
  - 1. Transfer Approval Form
  - 2. Validation Form
  - 3. Confirmation Approval Form
- If the current Financial Manager Requesting is transferring the asset(s) to a New Financial Manager:
  - The Manager Requesting/transferring the asset(s) will <u>only</u> approve:
    - 1. Transfer Approval Form.
  - The New Financial Manager receiving the asset(s) will appove:
    - 2. Validation Form
    - 3. Confirmation Approval Form.

#### Transfer Approval Form – Current Financial Manager Approval

e <u>Worklist</u>				Logoff	Help
Organization	Workflow	Activity	Priority	Created	
Root	GBARAJAS Assets Assets Tag#'s 25485,42843 Move ReqNo: 22238003	TransferApproval	Normal	20-Mar-2023 08:39:59 AM	٩

- The Workflow name will reflect the username of the Proxy that initiated the request in Jagnet, tag number(s) entered and the MoveReq Number assigned.
- Select the <u>Transfer Approval Form</u>
- Transfer Approval Section: Select Approve or Disapprove
- If the Financial Manager/Proxy does not approve the transfer form, a comment is required in the Disapproval Comments section before the form can be submitted.
- Select Complete.
- Return to Worklist.

Transfer Information
Manager Requesting Move: BECKYC Date: 20-Mar-2023 12:00:00 AM Phon≠#: 8722787
Justification: Transfer to update asset location and custodian
Silver Tags and Descriptions: 25485 - 7D/D3066-74P-F Desk Full Modesty Panel 74P 42843 - Dell Latitude 5310 Laptop 2 in 1 BTX
FROM
Asset Manager UserID/Name: BECKYC - Rebecca Cavazos Location/Title: 402057 - TC Bldg D Rm 119
то
Financial Manager ID/Name: A00000039 - Rebecca R Cavazos
Custodian UserID/Name: BECKYC - Becky Cavazos * Information for Employee to be moved
Move/Setup Reg Number: 22238003 Name:
Position:
Employee Classification: Assets Current Location:
Future Hire Information
Position#/Dept.:
* Transfer Approval
O Approve O Disapprove
Disapproval Comments:
Banner Workflow Assistance call: Ext. 2787 and 6328
* when an analyze information is submitted at a submitted at a

- The Transfer Approval Form has the following options:
  - Complete: Form will be submitted and transferred to the specified Financial Manager.
  - $\circ$   $\hfill Save & Close:$  Updates are saved so that they can be completed at a later time.
  - $\circ$  Cancel: No changes are saved; form remains in the worklist pending approval.

#### Validation Form - Current/New Financial Manager Approval

•	o Worklist الم								
	Organization	Workflow	Activity		Priority	Created			
R.	Root	GBARAJAS Assets Assets Tag#'s 25485,42843 Move ReqNo: 22238003 Readv	ValidationFor	m	Normal	20-Mar-2023 10:29:03 AM			

- Select the <u>Validation Form.</u>
- The Financial Manager or Proxy will need to enter the following required fields:
  - Asset Orgn: enter the Banner Department/Program Organization Code Number.
  - Asset Location: enter the new asset location code.
    - A list of codes can can be found in Argos Physical Inventory Locations
  - **<u>Custodian Email User ID</u>**: enter the custodian's STC email username.
    - Lowercase and do not include the @southtexascollege.edu
- Select Complete to submit the form.
- Return to Worklist.

worklist Validation Form	
This form is to validate	the asset information you are transferring.
FROM	
Manager Requesting Move	E: BECKYC
Date:	20-Mar-2023 12:00:00 AM
Phone#:	8722787
Asset Tags and Descriptio	ns: 25485 - 7D/D3066-74P-F Desk Full Modesty Panel 74P 42843 - Dell Latitude 5310 Laptop 2 in 1 BTX
Location/Title: Justification:	402057 - TC Bldg D Rm 119 Transfer to update asset location and custodian
	a a a a a a a a a a a a a a a a a a a
то	
Financial Manager:	BECKYC
Financial Manager Name:	A00000039 - Rebecca R Cavazos
Custodian Name:	BECKYC - Becky Cavazos
Inter-Departmental As Silver Tag)	signments (Displayed Values are from the Current
* Asset Orgn:	420004
* Asset Location:	402057
* Custodian Email UserID:	gbarajas
Banner Workflow Assistan	ce call: Ext. 2787 and 6328 Complete Save & Close Cancel

- The Validation Approval Form has the following options:
  - o Complete: Form will be submitted and transferred to the specified Financial Manager.
  - o Save & Close: Updates are saved so that they can be completed at a later time.
  - Cancel: No changes are saved; form remains in the worklist pending approval.

#### **Confirmation Approval Form - Current/New Financial Manager**

•	<u>Worklist</u>				
8	Organization Root	Workflow GBARAJAS Assets Assets Tag#'s 25485,42843 Move RegNo: 22238003 Readv	Activity. Confirmation_Approval	Priority Normal	Created 20-Mar-2023 11:28:44 AM

- Select the <u>Confirmation Approval Form</u>
- Shipping & Receiving Assistance: select:
  - Yes if assistance is needed with moving equipment
  - No if the request is only to update the asset Location and/or Custodian Name.
- The Financial Manager or Proxy will select Approve or Disapprove in the transfer approval section.
- If the Financial Manager or Proxy does not approve the transfer form, a comment is required in the Disapproval Comments section before the form can be submitted.
- Select Complete.

ιατοπ Αμμεοναί ΡοΓΜ	
	Asset Transfer Information
	42843 - Dell Latitude 5310 Laptop 2 in 1 BTX
	FROM
	Manager Requesting Move: BECKYC
	Date: 20-Mar-2023 12:00:00 AM
	Phone#: 8722787
	LOCH/HILE: 402057 - IC Bidg D RM 119 Justification: Transfer to undate asset location
	and custodian
	6
	то
	Financial Manager ID/Name: A00000039 - Rebecca R Cavazos
	Orgn/Title: 420004 - Central Receiving
	Location/Title: 402057 - TC Bldg D Rm 119 Custodian UserID/Name: BECKYC - Becky Cavazos
	Custonian useriu/ Manie, DECKTC - DECKY Cavazus
	* Information for Employee to be moved
	Move/Setup Reg Number: 22238003 Name:
	A#:
	Employee Classification: Assets
	Current Location: New Location:
	Note only for Assets: Select NO shipping and receiving assistance needed if an asset is to be undated-only and NOT relocated/transferred.
	Shipping & Receiving Assistance
	○ Yes ○ No
	-* Transfor Approval
	O Approve O Disapprove
	Disapproval Comments:
	biapproval commenta.
	1
	Banner Workflow Assistance call: Ext. 2787 and 6328
	* When no employee information is submitted then employee is not displayed on the fo
	Complete Save & Close Cancel

- The Confirmation Approval Form has the following options:
  - Complete: Form will be submitted and transferred to the specified Financial Manager.
  - $\circ$  Save & Close: Updates are saved so that they can be completed at a later time.
  - Cancel: No changes are saved; form remains in the worklist pending approval.

#### **Campus Site Coordinator Approval**

A Site Coordinator approval is required for moves occurring at other campus, with the exception of Pecan. The Site Coordinator have the option to disapprove a move request. If a move request is disapproved, an email notification is sent to the client with a disapproval comment.

#### **Facilities Planning & Construction Approval**

FPC approval is required for Employee and Furniture Moves and Setups.

 If you selected No for Shipping and Receiving assistance, the request will not require the Campus Site Coordinator and FPC approval.

#### **Email Confirmation**

An email will be sent to the Requestor, current and new Financial Manager(s) once the transfer has been approved and completed. The email will reflect the updated Equipment/Financial Manager, Location and Custodian Name.

Mon 3/20/2023 12:19 PM
RC beckyc@southtexascollege.edu
Req #22238003 for Assets and Confirmation Assets Transfer Email for Silver Tag: 25485 - 7D/D3066-74P-F Desk Full Modesty Panel 74P
To SRebecca Cavazos
Cc 🛛 Graciela Barajas
CAUTION: This email originated from outside South Texas College. Do not click links or open attachments unless you recognize the sender and know the content is safe.
This is to notify you that Silver Tag: Asset Tag Number and Description:
25485 - 7D/D3066-74P-F Desk Full Modesty Panel 74P 42843 - Dell Latitude 5310 Laptop 2 in 1 BTX
initiated by BECKYC has been approved in Workflow.
Transfer information is as follows:
From: Equipment Manager: BECKYC - Rebecca Cavazos
To: Equipment Manager: @New_Equip_Manager_UserID - <u>beckyc@southtexascollege.edu</u>
Custodian: gbarajas - Graciela Barajas
Orgn: 420004 - Central Receiving
Location: 402057 - TC Bldg D Rm 119
Justification: Transfer to update asset location and custodian
Shipping & Receiving Assistance: internal
Contact Information
Name: Graciela Barajas
Phone: 8722787
E-mail: <u>gbarajas@southtexascollege.edu</u>

#### Non-Inventory Move/Setup Transfers

 Moving non-inventory equipment to a different location within the same department or to a new department / Equipment Manager.

<u>A Non-Inventory Asset</u> has a value **under** \$1,000.00

• Regular Fund Items – Purple Tag barcode (starts with a 9)



• Grant Fund Items - Green Tag barcode (starts with a 5)



#### Purple, Green, & No Tag Transfers

#### Login to Jagnet

- Under Employee/Employee Resources, Select Move/Setup Request
- Select Assets Purple, Green, & No Tag
- Submit



- The Non-Inventory Assets Form will allow up to 10 items to be transferred to and from the same location and Financial Manager and you can enter items with Purple, Green or No Tag Number in the same form.
- **Do not** use this form for items with a Silver Tag.
- The Move/Setup Request# is automatically assigned.
- Select the Financial Manager Requesting the move, relocation or update.
- Fill in a <u>phone</u> number for the person initiating the request. (Do not include any lines between the numbers)
- Fill in the justification for the request. (Ex: condition of asset, transfer to new financial manager, relocation from and to, current location of assets, new location for the assets, etc.)
- Select the <u>To Financial Manager</u> who will receive the asset(s) or maintain ownership.
- Select the From Location from the drop-down list.
- Select the <u>To Location</u> from the drop-down list.
- Enter the Tag Number, Serial Number and Asset Description/Item or Model Number.
  - If no Tag or SN is available, enter N/A
- Submit

Move/Setup Request	22238262		Assets		
Manager Dequesting	Becky Ca	V2705	V	]	
Initiator's Phone#	8722787	10203	1		
lustification	0722707	Transf	or items to new l	acation	
	You have	97 characte	rs left.		
To Financial Manager	Becky Ca	vazos	~		
From Location	PCN Bldg	N Rm 145		~	
To Location	TC Bldg D	) Rm 120		▼	
Tag#		Serial#		Description	
9000010152		CYG56F		Dell Optiplex 760	
5000022348		1289KL		HON Cabinet	
N/A		N/A		2 Boxes of Office Supplies	

- After the form has been submitted, the option to submit more transfers is available (see below).
- Click on <u>Done</u> to complete the Jagnet process.



After completing the transfer in Jagnet:

#### Login to Workflow

Banner Workflow will display a Worklist of transfers reflecting the Jagnet submittal (s).

• Under Jagnet Home/Employee Apps/Workflow.

SOUTH TEXAS College							
者 Home	Employee Apps						
🖋 Academic Planning							
👻 Financial Aid							
\$ Student Accounts		Email	STC Computer	My Profile	Advising	HR Forms	Business Office Forms
🚱 Student Life		三					8
💄 Employee		Technology Requests	Tax Forms	Parking	Data Requests	Acknowledge Employee Handbook	TimeClock Plus
👑 Supervisor		а			<u>(</u>		
🛗 Events Calendar		Argos	Workflow	Chrome River	My Finance		

- The Financial Manager or Proxy will have access to review, approve or disapprove Workflow transfers.
  - If the Financial Manager/Proxy does not approve the form within five days, an alert will be displayed and a daily email reminder will be sent to the FM.
- If the Financial Manager is the same person transferring and receiving the asset(s), they will need to approve the following forms in Banner Workflow Worklist:
  - 1. Transfer Approval Form
  - 2. Confirmation Approval Form
- If the current Financial Manager Requesting is transferring the asset(s) to a New Financial Manager:
  - The Manager Requesting/transferring the asset(s) will <u>only</u> approve:
    - 1. Transfer Approval Form.
  - The New Financial Manager receiving the asset(s) will appove:
    - 2. Confirmation Approval Form.

#### Transfer Approval Form – Current Financial Manager Approval

•	Worklist				E Logol
	Organization	Workflow	Activity	Priority	Created
P	Root	Non Inventory Assets: Assets JGARCIA2 - 9000041178 Move ReqNo: 1 Ready	ConfirmationApprovalForm	Normal	20-Mar-2023 04:12:15 PM
	Root	Non Inventory Assets: Assets GBARAJAS - 9000010152 Move ReqNo: 22238262 Performing	TransferApprovalForm	Normal	20-Mar-2023 04:11:15 PM

- The Workflow Form name will reflect the username of the Proxy that initiated the request in Jagnet, tag number(s) entered and the MoveReq Number assigned.
- Select the <u>Transfer Approval Form</u>.
- Transfer Approval Section: Select Approve or Disapprove
- If the Financial Manager/Proxy does not approve the transfer form, a comment is required in the Disapproval Comments section before the form can be submitted.
- Select Complete.

🖕 Transfer Approval Form				
	Status of Equipment:	NA		
		Transfe	r Request Informatio	'n
	Requestor Name: Request Date: Justification:	Graciela Barajas 20-Mar-2023 12 Transfer items	to new location	
			6	
	FROM			
	Asset Manager: Location: Taos:	Rebecca Cavazo PCN Bldg N Rm	s 145	
		Tag #6	Sorial #c	Description
		rugs	CYG56F	Dell Optiplex 760 🔺
		9000010152		 ∢>
		5000022348	1289KL 🔺	HON Cabinet 🔺
			4	4 F
			N/A 🔺	2 Boxes of Office Supplies 🔺
		N/A	▼   ↓	✓
	то			
	Financial Manager:	Rebecca Cavazo	s	
	Location:	TC Bldg D Rm 1	20	
	Information for Employ	vee to be move	8	
	Move/Setup Reg Number: Name:	22238262		
	A#:			
	Position:			
	Current Location:	NA		
	New Location:	NA		
	Future Hire Informatio	n		
	Position#/Dept.:			
	* Transfer Approval			
	○ Approve		○ Disapprove	
	Disapproval Comments:			
	Banner Workflow Assistar	ce call: Ext. 278	7 and 6328	
	* When no employee info	rmation is submi	tted then employee is Save & Close Cancel	not displayed on the form.

- The Transfer Approval Form has the following options:
  - o Complete: Form will be submitted and transferred to the specified Financial Manager.
  - o Save & Close: Updates are saved so that they can be completed at a later time.
  - Cancel: No changes are saved; form remains in the worklist pending approval.

#### **Confirmation Approval Form - Current/New Financial Manager**

Select the <u>Confirmation Approval Form</u>

• Worklist					Cogof
<u>    Organization</u> <u>Root</u>	Workflow Non Inventory Assets: Assets GBARAJAS - 9000010152 Move RegNo: 22238262 Performing	A C	<u>activity</u> ConfirmationApprovalForm	<u>Priority</u> Normal	Created 20-Mar-2023 04:23:42 PM

- <u>Shipping & Receiving Assistance</u>: select:
  - **Yes** if assistance is needed with moving equipment
  - **No** if the request is only to update the asset Location and/or Custodian Name.
- The Financial Manager or Proxy will select Approve or Disapprove in the transfer approval section.
- If the Financial Manager or Proxy does not approve the transfer form, a comment is required in the Disapproval Comments section before the form can be submitted.

ConfirmationApproval Form		
		Transfer Request Information
	Move/Setup Reg Number	r: 22238262
	Requestor Name:	Graciela Barajas
	Request Date:	20-Mar-2023 12:00:00 AM
	_Justification:	Transfer items to new location
		· · · · · · · · · · · · · · · · · · ·
	FROM	
	Asset Manager:	Rebecca Cavazos PCN Bida N Rm 145
	Tags:	Tag Information
		Tag #s Serial #s Description
		CYG56F A Dell Optiplex 760 A
		9000010152
		4 > 4 >
		1289KL A HON Cabinet A
		5000022348 + +
		4 > 4 >
		N/A  A 2 Boxes of Office Supplies
		<u>N/A</u>
		4 > 4 >
	то	
	Financial Manager:	Rebecca Cavazos
	Location:	TC Bldg D Rm 120
	< font color = 'red'>Not	e: Select NO shipping and receiving assistance needed if an asset is
	*	a Not relocated/transferred.
	Shipping & Receivin	g Assistance
	O Yes	O No.
	-	- 112
	* Transfer Approval	
	-	-
	O <u>Approve</u>	O <u>Disapprove</u>
	Disapproval Commenter	
	Disapprovar comments.	
	Banner Workflow Assista	nce call: Ext. 2787 and 6328
	* 101	and the first state of the state
	* When no employee info	ormation is submitted then employee is not displayed on the form.
		Complete   Save & Close   Cancel

- The Confirmation Approval Form has the following options:
  - o Complete: Form will be submitted and transferred to the specified Financial Manager.
  - o Save & Close: Updates are saved so that they can be completed at a later time.
  - Cancel: No changes are saved; form remains in the worklist pending approval.

#### **Campus Site Coordinator Approval**

A Site Coordinator approval is required for moves occurring at other campus, with the exception of Pecan. The Site Coordinator have the option to disapprove a move request. If a move request is disapproved, an email notification is sent to the client with a disapproval comment.

#### **Facilities Planning & Construction Approval**

FPC approval is required for Employee and Furniture Moves and Setups.

 If you selected No for Shipping and Receiving assistance, the request will not require the Campus Site Coordinator and FPC approval.

#### **Email Confirmation**

An email will be sent to the Requestor, current and new Financial Manager(s) once the transfer has been approved and completed. The email will reflect the updated Financial Manger and Location.



This is to notify you that these tags: Tag Information						
Tag #s	Serial #s	Description				
9000010152	CYG56F	Dell Optiplex 760				
5000022348	1289KL	HON Cabinet				
N/A	N/A	2 Boxes of Office Supplies				

End of Information

have been approved in Workflow by the Financial Manager Rebecca Cavazos. Transfer information is as follows:

From: Current Manager: BECKYC - Rebecca Cavazos

Location: PCN Bldg N Rm 145

Justification: Transfer items to new location

To: New Manager: BECKYC - Rebecca Cavazos

Location: TC Bldg D Rm 120

Shipping & Receiving Assistance: No

Contact Information

Name: Graciela Barajas

Phone: 8722787

E-mail: gbarajas@southtexascollege.edu

# Auction/Surplus Assets Transfer for Inventory

#### Purpose

- Obsolete furniture, equipment and supplies no longer in use or needed.
- Do not send "Not Found" Items to Auction/Surplus
  - o Items in your Physical Inventory Report that can not be found or located.
- Do not send "intangible" Software/Licenses to Auction/Surplus
  - Property having no physical existence



Grant Fund Items - Silver Tag and Green Tag (Grant) barcode
 If the item has both tags, use only the Silver Tag to transfer the item.



#### FA Mass Transfer (Silver Tags) for Orgn. Locn and Custodian - Inventory

#### Login to Jagnet

Under Employee/Employee Resources, Select Auction/Surplus Assets



Select FA Mass Transfer (Silver Tags) for Orgn. Locn and Custodian for Inventory Items



Note: Inventory transfers will be reflected in the Physical Inventory Report

- The FA Mass Transfer Form will allow up to 20 silver tags to be transferred to Auction/Surplus.
- All of the items must be transferred from the same Financial Manager and Location.

The request will require:

- The current Financial Manager Requesting the transfer to Auction/Surplus.
- <u>Phone</u> number for the person initiating the request. (Do not include any lines between the numbers)
- Fill in the justification for the request. (Ex: condition of asset, current location of assets and contact)
- Select the To Financial Manager: Becky Cavazos
- Fill in the complete Silver Tag number(s) and Submit form.

FA Mass Transfer (Silver Tags ) for Orgn, Locn and Custodian							
Manager Requesting Initiator's Phone# Justification	Becky Cavazos - BECKY 8722787 Obsolet	C v te items no longer in use					
To Financial Manager *Please enter in the entire tag number* *Including leading zeros if any* Tand#s	You have 97 characters left.  To Financial Manager  *Please enter in the entire tag number* *Including leading zeros if any*						
	25485	42853					
Submit							

- After the form has been submitted, the option to submit more transfers is available (see below).
- Click on <u>Done</u> to complete the Jagnet process.



After completing the transfer in Jagnet:

#### Login to Workflow

Banner Workflow will display a Worklist of transfers reflecting the Jagnet submittal (s).

• Under Jagnet Home/Employee Apps/Workflow.

SOUTH TEXAS College							
👫 Home	Employee Apps						
🖋 Academic Planning							
🕈 Financial Aid							
\$ Student Accounts		Email	STC Computer	My Profile	Advising	HR Forms	Business Office Forms
😣 Student Life		黒				4	8
🔓 Employee		Technology Requests	Tax Forms	Parking	Data Requests	Acknowledge Employee Handbook	TimeClock Plus
嶜 Supervisor		а		<b>C</b>	6		
🛗 Events Calendar		Argos	Workflow	Chrome River	My Finance		

- The Financial Manager or Proxy will have access to review, approve or disapprove Workflow transfers.
  - If the Financial Manager/Proxy does not approve the form within five days, an alert will be displayed and a daily email reminder will be sent to the FM.
- The Financial <u>Manager Requesting</u> to transfer the asset(s) to <u>Auction/Surplus</u> will <u>only</u> approve:
  - 1. Transfer Approval Form.
- The New Financial Manager for Auction/Surplus receiving the asset(s) will appove:
  - 2. Validation Form
  - 3. Confirmation Approval Form.

#### Transfer Approval Form – Current Financial Manager Approval

•	• Worklist				C L
	Organization	Workflow	Activity	Priority	Created
æ	Root	GBARAJAS Assets Assets Tag#'s 25485,42843 Move ReqNo: 1	TransferApproval	Normal	21-Mar-2023 11:11:53 AM

- The Workflow Form name will reflect the username of the Proxy that initiated the request in Jagnet, tag number(s) entered.
- Select the Transfer Approval Form
- The form will require the <u>Manager Requesting</u> or Proxy approval and it will display a summary of the asset(s) submitted by the client.
- The Financial Manager/Proxy will select Approve or Disapprove in the transfer approval section.
- If the Financial Manager/Proxy does not approve the transfer form, a comment is required in the Disapproval Comments section before the form can be submitted.
- Select Complete.

worklist • Transfer Approval Form	
	Transfer Information
	Manager Requesting Move: BECKYC Date: 21-Mar-2023 12:00:0D AM Phone≓: 8722787 Justification: Dbsolete items no longer in use
	Silver Tags and Descriptions: 25485 - 7D/D3066-74P-F Desk Full Modesty Panel 74P 42843 - Dell Latitude 5310 Laptop 2 in 1 BTX
	FROM Asset Manager UserID/Name: BECKYC - Rebecca Cavazos Location/Title: 402057 - TC Bldg D Rm 119
	TO Financial Manager ID/Name: A00000039 - Rebecca R Cavazos Financial Manager Email: beckyc@southtexascollege.edu Custodian UserID/Name: BECKYC - Becky Cavazos * Information for Employee to be moved
	Move/Setup Req Number: 1 Name: A#: Position: Employee Classification: Assets
	Current Location: New Location: Future Hire Information Position#/Dept.:
	Transfer Approval     O Approve     Disapprove
	Disapproval Comments:
	Banner Workflow Assistance call: Ext. 2787 and 6328 * When no employee information is submitted then employee is not displayed on the form. Complete [Save & Close] [Cancel]

- The Transfer Approval Form has the following options:
  - Complete: Form will be submitted and transferred to the specified Financial Manager.
  - o Save & Close: Updates are saved so that they can be completed at a later time.
  - Cancel: No changes are saved; form remains in the worklist pending approval.

#### Validation Form - New Financial Manager for Auction/Surplus Approval

•	<u>Worklist</u>				
	<u>Organization</u> <u>Root</u>	<u>Workflow</u> <u>GBARAJAS Assets Assets Tag#'s 25485,42843 Move ReqNo: 1</u> Ready	<u>Activity</u> <u>ValidationForm</u>	<u>Priority</u> Normal	<u>Created</u> 21-Mar-2023 11:44:41 AM

- Select the <u>Validation Form.</u>
- The Financial Manager or Proxy will need to enter the following required fields:
  - Asset Orgn: enter the Banner Department/Program Organization Code Number.
  - Asset Location: enter the new asset location code for Auction/Surplus.
  - **Custodian Email User ID**: enter the custodian's STC email username.
- Select Complete to submit the form.
- Return to Worklist.

e Validation Form		
Th	is form is to validate the	e asset information you are transferring.
FR	<u>IOM</u>	
_ <u>Ma</u>	anager Requesting Move:	BECKYC
_ <u>Dat</u>	ite:	21-Mar-2023 12:00:00 AM
_ <u>Pho</u>	one#:	<u>8722787</u>
_ <u>Ass</u>	set Tags and Descriptions:	25485 - 7D/D3066-74P-F Desk Full Modesty Panel 74P 42843 - Dell Latitude 5310 Laptop 2 in 1 BTX
_ Los	cation/Title:	ی 402057 - TC Bldg D Rm 119
_ <u>Jus</u>	stification:	Obsolete items no longer in use
<u>10</u>	2	
_ Fin	nancial Manager:	BECKYC
_ Fin	nancial Manager Name:	A00000039 - Rebecca R Cavazos
_ <u>Cu</u>	stodian Name:	<u>BECKYC - Becky Cavazos</u>
Int Silt	<u>ter-Departmental Assig</u> Iver Tag <u>)</u>	<u>ments (Displayed Values are from the Current</u>
<u>* Ass</u>	set Orgn:	420005
<u>* Ass</u>	set Location:	1
📫 <u>* Cu</u>	<u>istodian Email UserID:</u>	jerryq
Bar	nner Workflow Assistance	call: Ext. 2787 and 6328
		mplete Save & Close Cancel

- The Validation Approval Form has the following options:
  - Complete: Form will be submitted and transferred to the specified Financial Manager.
  - o Save & Close: Updates are saved so that they can be completed at a later time.
  - o Cancel: No changes are saved; form remains in the worklist pending approval.

#### **Confirmation Approval Form - New Financial Manager for Auction/Surplus**

••	Worklist					
	Organization	Workflow	A	ctivity	Priority	Created
R)	Root	GBARAJAS Assets Assets Tag#'s 25485,42843 Move ReqNo: 1 Ready	c	Confirmation_Approval	Normal	21-Mar-2023 12:01:33 PM

- Select the <u>Confirmation Approval Form</u>
- Shipping & Receiving Assistance: select:
  - **Yes** for assistance is needed with moving equipment to Auction/Surplus
- The Financial Manager or Proxy will select Approve or Disapprove in the transfer approval section.
- If the Financial Manager or Proxy does not approve the transfer form, a comment is required in the Disapproval Comments section before the form can be submitted.

orAlist Confirmation Approval Form	
	Asset Transfer Information
	* Asset Tags and Descriptions: 25485 - 70/03066-74P-F Desk Full Modesty Panel 74P 42843 - Dell Latitude 5310 Laptop 2 in 1 BTX
	EROM
	Nanager Requesting Move: BECKYC
	Date: 21-Mar-2023 12:00:00 AM
	Phone#: 8722787
	Locn/Title: 402057 - TC Bldg D Rm 119
	bussiete items no ionger in use
	1
	то
	Financial Manager ID/Name: A00000039 - Rebecca R Cavazos
	Orgn/Title: 420005 - Inventory Control
	Custodian UserID/Name: BECKYC - Becky Cavazos
	* Information for Employee to be moved
	Move/Setup Reg Number: 1 Name: ^+:
	Employee Classification: Assets
	Current Location: New Location:
	Note only for Assets: Select NO shipping and receiving assistance needed if an asset is to be updated-only and NOT relocated/transferred.
	Shipping & Receiving Assistance
	● Yes ○ No
	* Transfer Approval
	Approve     ODisapprove
	Disapproval Comments:
	4
	Banner Workflow Assistance call: Ext. 2787 and 6328 * When no employee information is submitted then employee is not displayed on the form
	Complete Save & Close Cancel

- The Confirmation Approval Form has the following options:
  - Complete: Form will be submitted and transferred to the specified Financial Manager.
  - o Save & Close: Updates are saved so that they can be completed at a later time.
  - Cancel: No changes are saved; form remains in the worklist pending approval.

#### **Email Confirmation**

An email will be sent to the Requestor, Current and new Financial Manager(s) once the transfer has been approved and completed. The email will reflect the updated Financial Manager, Location and Scheduled Pick up Date.

Tue 3/21/2023 12:15 PM
RC beckyc@southtexascollege.edu
Req #1 for Assets and Confirmation Assets Transfer Email for Silver Tag: 25485 - 7D/D3066-74P-F Desk Full Modesty Panel 74P
To 🛛 Rebecca Cavazos Cc 🔗 Graciela Barajas; 🜖 Julio Cuestas; 🜖 Derek Dixon Wheeler; 🔿 Earl Lane; 🔍 Jesus G. Flores (Chuy); 🕓 Pablo Perez; 🔿 Ricardo Cuellar; 🔿 German Reves
This is to notify you that Silver Tag Number(s) and Description(s):
25485 - 7D/D3066-74P-F Desk Full Modesty Panel 74P 42843 - Dell Latitude 5310 Laptop 2 in 1 BTX
initiated by BECKYC has been approved in Workflow.
Transfer information is as follows:
From: Equipment Manager: BECKYC - Rebecca Cavazos
Location: 402057 - TC Bldg D Rm 119
To: Equipment Manager: BECKYC - <u>beckyc@southtexascollege.edu</u>
Custodian: jerryq - Gerardo Quintanilla
Orgn: 420005 - Inventory Control
Location: 1 - TC SR Warehouse - Auction
Justification: Obsolete items no longer in use
Shipping & Receiving Assistance: assist
Move/Setup Information:
Request Number:1
Request Type: Assets
Move Schedule Date: 21-MAR-23

#### **Completion Date**

• Once the items have been picked up for Auction/Surplus, login to Workflow and select the Completion Date Form in Worklist.

• Worklist				Logoff
Organization	Workflow	Activity	Priority	Created
Root	GBARAJAS Assets Assets Tag#'s 25485,42843 Move ReqNo: 1 Performing	Completion_Date	Normal	21-Mar-2023 12:15:27 PM

- Click on the calendar image and select the pick-up date.
- Complete

Worklist Move/Setup Completion Date	
	Move/Setup Completed Date Move Request No: NA
	* Completed Date: 20-Mar-2023

- The Completion Form has the following options:
  - Complete: Form will be submitted and transferred to the specified Financial Manager.
  - Save & Close: Updates are saved so that they can be completed at a later time.
  - Cancel: No changes are saved; form remains in the worklist pending approval.

# Auction/Surplus Assets Transfer for Non-Inventory

#### Purpose

- Obsolete furniture, equipment and supplies no longer in use or needed.
- Do not use this form to send Silver Tag Inventory Items to Auction/Surplus
   This form does not reflect the updates in the Argos Physical Inventory Report

<u>A Non-Inventory Asset</u> has a value **under** \$1,000.00

• Regular Fund Items – Purple Tag barcode (starts with a 9)



• Grant Fund Items - Green Tag barcode (starts with a 5)



Non-Inventory Assets – Purple/Green Tags and No Tag Items

#### Login to Jagnet



Under Employee/Employee Resources, Select Auction/Surplus

• Select Non-Inventory Assets – Purple/Green Tags

```
Auction/Surplus Assets Form Menu
FA Mass Transfer (Silver Tags) for Orgn, Locn and Custodian
Non Inventory Assets - Purple/Green Tags
```

• The Non-Inventory Assets Form will allow up to 10 items to be sent to and from the same location and Financial Manager and you can enter items with Purple, Green or No Tag Number in the same form.

The request will require:

- The current Financial Manager Requesting the transfer to Auction/Surplus.
- Phone number for the person initiating the request. (Do not include any lines between the numbers)
- Fill in the justification for the request. (Ex: condition of asset, current location of assets and contact)
- Select the To Financial Manager: Becky Cavazos
- Select the From Location from the drop-down list.
- Select the <u>To Location</u> from the drop-down list **TC SR Warehouse Auction**
- Enter the Tag Number, Serial Number and Asset Description/Item or Model Number.
  - If no Tag or SN is available, enter N/A
- Submit

Non Inventory Assets - Purple/Green Tags							
Manager Requesting Initiator's Phone# Justification	Becky Cava 8722787	Zos 🗸	or Auction				
To Financial Manager	You have 1 Becky Cava	02 characters left.					
To Location	TC SR Ware	house - Auction					
Tag#		Serial#		Description			
9000054983		GH6G45		Dell Optiplex 720			
5000012856		N/A		Purple Chair			
N/A		N/A		1 Box of Miscellar	neous items		
N/A		N/A	]	Used Toners			
			]				
			]				
Submit		·					

- After the form has been submitted, the option to submit more transfers is available (see below).
- Click on <u>Done</u> to complete the Jagnet process.



After completing the transfer in Jagnet:

#### Login to Workflow

Banner Workflow will display a Worklist of transfers reflecting the Jagnet submittal (s).

• Under Jagnet Home/Employee Apps/Workflow.

SOUTH TEXAS COLLEGE							
👫 Home	Employee Apps						
🖋 Academic Planning							-
🕈 Financial Aid							
\$ Student Accounts		Email	STC Computer	My Profile	Advising	HR Forms	Business Office Forms
🚱 Student Life		黒				<u></u>	8
🛔 Employee		Technology Requests	Tax Forms	Parking	Data Requests	Acknowledge Employee Handbook	TimeClock Plus
嶜 Supervisor		a		C	0		
🛗 Events Calendar		Argos	Workflow	Chrome River	My Finance		

- The Financial Manager or Proxy will have access to review, approve or disapprove Workflow transfers.
  - If the Financial Manager/Proxy does not approve the form within five days, an alert will be displayed and a daily email reminder will be sent to the FM.
- The Financial <u>Manager Requesting</u> to transfer the asset(s) to <u>Auction/Surplus</u> will <u>only</u> approve:
  - 1. Transfer Approval Form.
- The New Financial Manager for Auction/Surplus receiving the asset(s) will appove:
  - 2. Confirmation Approval Form.

#### Transfer Approval Form – Current Financial Manager Approval

°	Worklist				
_	Organization Root	Workflow Non Inventory Assets: Assets MFELICIA - NA Move RegNo: 22238217	Activity ShipRecApproval	Priority Normal	Created 21-Mar-2023 02:17:05 PM
ß	Root	Ready Non Inventory Assets: Assets GBARAJAS - 9000054983 Move RegNo: 1	TransferApprovalForm	Normal	21-Mar-2023 02:10:33 PM

- The Workflow Form name will reflect the username of the Proxy that initiated the request in Jagnet, tag number(s) entered.
- Select the Transfer Approval Form
- The form will require the <u>Manager Requesting</u> or Proxy approval and it will display a summary of the asset(s) submitted by the client.
- The Financial Manager/Proxy will select Approve or Disapprove in the transfer approval section.
- If the Financial Manager/Proxy does not approve the transfer form, a comment is required in the Disapproval Comments section before the form can be submitted.

🗞 Transfer Approval Form				
	Status of Equipment:	NA		
		Transfe	r Request Information	on
	Requestor Name: Request Date: Justification:	Graciela Barajas 21-Mar-2023 12 Obsolete items	s 2:00:00 AM 5 for Auction	
			6	
	FROM Asset Manager: Location: Tags:	Rebecca Cavazo PCN Bldg E Rm Tag Informatio	ns 107	
		Tag #s	Serial #s	Description
		9000054983	GH6G45 🖌	Dell Optiplex 720 🛦 🗸
		5000012856	N/A	Purple Chair 🔺 🗸
		N/A	N/A -	1 Box of Miscellaneous items
		N/A	N/A ~	Used Toners 🔬
	TO Financial Manager: Location: Information for Employ Move/Setup Req Number: Name: A#: Position: Employee Classification: Current Location: New Location: Future Hire Information Position #/Dept.:	Rebecca Cavazo TC SR Warehou ee to be move 1 Assets NA NA n	is se - Auction d	
	O Approve		ODisapprove	
	Disapproval Comments:		<i>li</i>	
	Banner Workflow Assistan	ce call: Ext. 278	7 and 6328	
	* When no employee info	Complete	itted then employee is Save & Close Cance	not displayed on the form.

- The Transfer Approval Form has the following options:
  - $\circ$   $\;$  Complete: Form will be submitted and transferred to the specified Financial Manager.
  - $\circ$  Save & Close: Updates are saved so that they can be completed at a later time.
  - $\circ$   $\;$  Cancel: No changes are saved; form remains in the worklist pending approval.

#### **Confirmation Approval Form - New Financial Manager for Auction/Surplus**

🖁 Worklist				<b>6</b> Lo <u>r</u>
Organization	Workflow	Activity	Priority	Created
Organization	Non Inventory Assets: Assets GBARAJAS - 9000054983 Move ReqNo: 1	ConfirmationApprovalForm	Normal	21-Mar-2023 02:21:40 PM

- Select the <u>Confirmation Approval Form</u>
- Shipping & Receiving Assistance: select:
  - Yes for assistance is needed with moving equipment to Auction/Surplus
- The Financial Manager or Proxy will select Approve or Disapprove in the transfer approval section.
- If the Financial Manager or Proxy does not approve the transfer form, a comment is required in the Disapproval Comments section before the form can be submitted.

error worklist				
		Transfe	r Request Informatio	n
	Move/Setup Req Number: Requestor Name: Request Date: Justification:	er: 1 Graciela Barajas 21-Mar-2023 12:00:00 AM Obsolete items for Auction		
			4	
	FROM			
	Asset Manager:	Rebecca Cavazo	s	
	Location: Tags:	PCN Bldg E Rm	107	
	lugo.		Corial #c	Description
		Tag #5	GH6G45	Dell Optiplex 720
		9000054983		
			4	
			N/A 🔺	Purple Chair 🔺
		5000012856	-	-
			4	4. F
			N/A 🔺	1 Box of Miscellaneous items 🔺
		N/A		
			4 F	Used Teners
		N/A	IN/A A	used toriers x
		1 170	4	4 ×
		L		
	то			
	Financial Manager: Location: < font color = 'red'>Note to be updated-only and	Rebecca Cavazo TC SR Warehous Select NO shi NOT relocated	s se - Auction pping and receiving a l/transferred.	ssistance needed if an asset is
	Shipping & Receiving	Assistance		
	⊖ Yes		○ No	
🛁	* Transfer Approval			
	○ Approve		○ Disapprove	
	Disapproval Comments:		li.	
	Banner Workflow Assistar	ice call: Ext. 278	7 and 6328	
	* When no employee info	rmation is submi	tted then employee is n	ot displayed on the form.

- The Confirmation Approval Form has the following options:
  - Complete: Form will be submitted and transferred to the specified Financial Manager.
  - $\circ$  Save & Close: Updates are saved so that they can be completed at a later time.
  - Cancel: No changes are saved; form remains in the worklist pending approval.

#### **Email Confirmation**

An email will be sent to the Requestor, Current and new Financial Manager(s) once the transfer has been approved and completed. The email will reflect the new Financial Manager, Location and Scheduled Pick-up Date.

		Tue 3/21/20	23 2:27 PM	
	RC	becky	@southtexascolleg	e.edu
	<ul> <li>Image: Contract of the second s</li></ul>	Req #1 fo	or Assets and Confirmation	Non Inventory Assets Transfer Email for 9000054983
То	🗢 Rebecca C	avazos		
Cc A	Graciela Ba	irajas oblems with	how this message is displayed, clip	k here to view it in a web browser.
	in chere are pro			
т	his is to noti	fy you tha	t these tags: Tag Information	
	Tag #s	Serial #s	Description	
	9000054983	GH6G45	Dell Optiplex 720	
	5000012856	N/A	Purple Chair	
	N/A	N/A	1 Box of Miscellaneous items	
	N/A	N/A	Used Toners	
E	nd of Inform	ation		
h	nave been ap	proved in	Workflow by the Financial Ma	nager Rebecca Cavazos. Transfer information is as follows:
F	rom: Current	t Manager	: BECKYC - Rebecca Cavazos	
L	ocation: PCN	Bldg E Rr	n 107	
J	ustification: (	Obsolete i	tems for Auction	
т	o: New Man	ager: BECI	KYC - Rebecca Cavazos	
L	ocation: TC S	R Wareho	ouse - Auction	
s	hipping & Re	ceiving As	ssistance: Yes	
N	Nove Schedu	le Date: 2	1-MAR-23	
C	Contact Inform	mation		
Ν	Name: Gracie	la Barajas		
P	hone: 87227	87		

#### **Completion Date**

• Once the items have been picked up for Auction/Surplus, login to Workflow and select the Completion Date Form in Worklist.

•	<u>Worklist</u>					
_	Organization	Workflow	<u>Activity</u>	1	<u>Priority</u>	Created
	<u>Root</u>	Non Inventory Assets: Assets GBARAJAS - 9000054983 Move ReqNo: 1	Completion Date		Normal	21-Mar-2023 02:26:48 PM

- Click on the calendar image and select the pick-up date.
- Complete

Worklist • Move/Setup Completion Date	
	Move/Setup Completed Date
	Move Request No: NA
	* Completed Date: 20-Mar-2023
	Complete Save & Close Cancel

- The Completion Form has the following options:
  - Complete: Form will be submitted and transferred to the specified Financial Manager.
  - $\circ$   $\hfill Save & Close:$  Updates are saved so that they can be completed at a later time.
  - Cancel: No changes are saved; form remains in the worklist pending approval.

# **Banner Workflow User Information – Proxy Date**

Login to Workflow to review Proxy Dates, extend Proxy Access or Delete a Proxy

• Under User Profile/User Information

User Profile	
My Processes	
User Information	

• I am Proxy For - Effective To Date

I am Pro	xy For					
User	Role	Organization	Confidential	Non-Confidential	Effective From	Effective To
beckyc	Fixed Asset Manager	Root	Yes	Yes	19-Oct-2012 07:57:29 AM	31-Dec-2022 12:00:00 AM

The Financial Manager is the only one that can extend or remove Proxy access.

• Under User Profile / User Information / My Proxies

#### **Extend Proxy Access**

Select the Proxy username to extend the access

My Proxies							
-	user gbarajas	Role Fixed Asset Manager	Organization Root	Confidential Yes	Non-Confidential Yes	Effective From 19-Oct-2012 07:57:29 AM	Effective To 30-3un-2013 08:26:43 AM
	jerryq	Fixed Asset Manager	Root	Yes	Yes	23-Aug-2012 01:26:59 PM	31-Dec-2013 01:51:19 PM

• Click on the calendar image to select a new date, then Save.

Organization - RoleName: Root - Fixed Asset Manager User: gbarajas Effective From: [19-Oct-2012 07:57:29 AM ] Effective To: 30-Jun-2013 08:20:43 AM ] Confidential: 7	Proxy Details		
Organization - RoleName: Root - Fixed Adset Manager User: gbarajas Effective From: [J9-Oct-2012 07:57:29 AM ] Effective To: 30-Jun-2013 08:26:43 AM ] Confidential: 7			
Effective From: 19-Oct-2012 07:57:29 AM Effective To: 30-Jun-2013 08:20:43 AM Confidential: 7		Organization - RoleName: User:	Root - Pixed Asset Manager gbarajas
Effective To: 30-Jun-2013 08:26:43 AM Confidential:		Effective From:	19-Oct-2012 07:57:29 AM
Confidential: (?) Non-Confidential: (?)		Effective To:	30-Jun-2013 08:26:43 AM
Non-Confidential:		Confidential:	2
		Non-Confidential:	1

#### **Delete Proxy Access**

- Click on the box next to the Proxy username to delete/remove the access
- Then, select <u>Delete Selected Proxies</u>

User	Robe	Organization	Confidential	Non-Confidential	Effective Ergen	Effective To
gbarajas	Fixed Asset Manager	Root	Yes	Yes	19-Oct-2012 07:57:29 AM	30-3un-2013 08:26:43 AM
jerryq	Fixed Asset Manager	Root	Yes	Yes	23-Aug-2012 01:26:59 PM	31-Dec-2013 01:51:19 PM
mavila	Fixed Asset Manager	Root	Yes	Yes	03-Aug-2012 11:58:06 AM	29-Mar-2013 12:20:56 PM

# FAQ's

- **Proxy Access:** A Banner Workflow Access request form must be completed and approved by the Financial Manager.
  - The access will be for Jagnet Fixed Assets Forms, Argos Physical Inventory Reports and Banner Fixed Assets Workflow.
  - The access will also be used for all moves and relocations coordinated through the Planning and Construction Department.
    - FA Banner Workflow FM Access Form Access for New Financial Managers
    - FA Banner Workflow Proxy Access Form Access for New Proxies
  - Please contact the Fixed Assets Department to request the access form:
    - Gracie Barajas, ext. 2787 gbarajas@southtexascollege.edu
- **New Program Chair/Financial Managers** may need to run the Argos report using the previous program chair/Financial Manager's A Number to capture all assets.
  - To transfer all assets from a previous financial manager to the new financial, please contact:
    - Becky Cavazos at ext. 4680, beckyc@southtexascollege.edu
    - Gracie Barajas, ext. 2787, <u>gbarajas@southtexascollege.edu</u>
  - The new Financial Manager will then need to update the location and custodian name if needed using the FA Jagnet/Banner Workflow Process.
- The Financial Manager for auction/surplus property is **Becky Cavazos**.
- For "Not Found" items: This is an internal update for the current FM.
  - Update to Location Code: 3 Not Found
- For **Stolen Items**: Please contact the STC Police Department and complete an incident report. The incident report must be emailed to Jerry Quintanilla at <u>jerryq@southtexascollege.edu</u> / Gracie Barajas at <u>gbarajas@southtexascollege.edu</u>
  - An internal update for the current FM is required Update to Location code: 3 Not Found
  - In the transfer justification reference the incident report number.
- For outdated or expired **Software/License** (Intangible/Not hardware): This is an internal update for the current FM. Update to **Location code 4 Write Off**
- A report for Not Found and Write-Off assets will be presented to the President and Board for approval. After approval, the assets will be removed from the inventory report.
- **Certificate of Completion**: Once the verification of assets is complete and assets have been updated using the FA Jagnet/Banner Workflow System:
  - The FM must login to Jagnet/Supervisor Link/Additional Links/Certificate of Completion
    - Click Yes If Complete NOTE: If you have several departments, please make sure all dept. have completed their inventory
    - Click No Include additional time is needed
    - Once Complete Access the Certificate of Completion and click Yes