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Oracle 11i - iAssets

Student Guide
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Oracle 11i iAssets: Overview
Course Objectives

After this course, you should be able to:

- Complete the registration of Equipment Purchases (Assets)
- Search for Assets relating to you
- Run simple reports and transfer to excel
- Transfer Assets from one Location to another
- Transfer Assets Responsibility from one Employee to another
- Understand the Disposal/Write off process for Assets

Course Overview

This course discusses the basic features of Asset Management within Oracle Applications, Release 11i. You will learn how to complete the registration of equipment purchases between $1000 ($1K) and $5000 ($5K), Search for and view additional information in regards to assets, transfer assets from one location to another and from one employee to another (responsibility) using i/Assets.

You will also be reviewing some new functionality such as attaching documentation to Transfers, and exporting reports to excel. These will be demonstrated to you during this class, and also a background into the responsibility you have in relation to Asset registration, tracking and disposal.
For Equipment purchases between $1k and $5k, responsibility lies with;

- Faculties/Services Centres, nominated staff – also known as ‘Asset Custodians’

- Management of assets has for the last 14 years been the responsibility of the Area/Centre purchasing the asset

Who is responsible for Assets and Why

For Equipment purchases between $1k and $5k, responsibility lies with;

1. Nominated staff within the Faculties and Centres are known as ‘Asset Custodians’.

2. A ‘custodian’ is appointed by management* to ensure timely recording, tracking, reporting and disposal of University assets in accordance with established policies & procedures.

*management (the actual delegate is usually the Faculty Accountant or in some cases the manager and generally the Business Manager for Service Centres).
Benefits of Asset Tracking

• Business objectives
• Accountability and Audit
• Asset Safekeeping
• Plan for replacement
• Conforms with Universities Policies and Procedures

Business objectives
Each business/learning centre has objectives. You need to know what assets you have to be able to deliver on these objectives. Eg SCIS and KITSC need to know exactly what computing equipment they have. Science laboratories need to know where their equipment is located and in what condition.

Accountability and Audit
ECU publish financial statements which are tabled in State Parliament. The Office of the Auditor General will randomly sight any asset recorded on the register i.e. Oracle. You must be able to explain losses or movements.
Some equipment requires regular certification due to the accuracy required of that equipment. You can readily identify their location for servicing.

Asset Safekeeping
Requires a common sense approach to storage, use and protection against theft or misuse.

Plan for replacement
Enables obsolete equipment to be readily identified and budgeted for replacement at a future date. A good example is computing and in the case of networks, servers and communications equipment. Scientific equipment is another such item.

Conforms with Universities Policies and Procedures
Policy document on Recording and tracking and the policy on Capital acquisitions which is to be read in conjunction has been approved and will be released shortly. In the meantime ECU conforms with the State Governments Treasurers instructions.
What are your responsibilities?

For Equipment purchases between $1k and $5k:

1. Complete the Registration of Equipment (Assets), after ‘receiving’ the Equipment in iProcurement

2. Update the iAssets system when transferring responsibility from one employee to another

3. Update the iAssets system when assets move from one location to another.

4. Disposal of Assets using iAssets

What are your Responsibilities?

For Equipment purchases between $1k and $5k

1. Complete the Registration of Equipment (Assets), after ‘receiving’ the equipment in iProcurement

2. Update the iAssets system when transferring responsibility from one employee to another (iAssets replaces HardCat system for this task)

3. Update the iAssets system when assets move from one location to another. (iAssets replaces HardCat system for this task)

   The 3 responsibilities outlined above are the minimum requirements for an Asset Custodian. Users who only purchase equipment between $1K and $5K (assets) need only to complete task 1.

   Note: the responsibility of registering the equipment may be transferred to the ‘Asset Super User’ if this has been previously agreed by management in that Faculty/Service Centre.

4. Update the iAssets system when assets are to be disposed.

   Note: An ‘Asset Super User’ is one nominated staff member for each faculty/service centre as the first point of contact for asset related queries and for training new staff who are custodians (prior to the main asset training through PD)

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Oracle 11i iAssets: Overview
Revision V 1.0

Effective 15 January 2006
Chapter 1 - Page 7
Oracle 11i iAssets: Registering Equipment between $1k and $5k

Chapter 2
Oracle 11i iAssets: Registering Equipment between $1k and $5k
Lesson Objectives

After this lesson, you should be able to:

- Complete the registration of Equipment Purchases (Assets)
Demonstration

Demonstration

MANAGEMENT SERVICES CENTRE

Registering Equipment between $1k and $5k

Demo – Registering Equipment between $1K and $5K

In this exercise you will learn how to complete the registration of equipment between $1K and $5K. An e-mail notification is sent to your inbox (within the hour) after the equipment has been received in iProcurement.

It is generally the responsibility of the iProcurement user who has received the goods, to complete the registration although the ‘Assets Super User’ for your area may be nominated in some circumstances, in which case the e-mail should be forwarded to the ‘Assets Super User’ for their completion.

A reminder e-mail will be received daily if the registration of the equipment has not been completed, and there will be subsequent e-mails until the registration is complete.

The 13 steps to complete registration are highlighted in the e-mail, and the demonstration of this process will be shown in detail in this manual.
Before you can complete the registration of assets you need to:
Open Microsoft Excel and select Tools > Macros > Security…
(T) Trusted Publishers
Tick the “Trust Access to Visual Basic Project” check box and (B) OK

Close Down Microsoft Excel
You will receive an e-mail from ‘Oracle Workflow Mailer’ for equipment received between $1K and $5K, which will look similar to the one above. It details each step required to complete the registration of the equipment.
Once the attachment has been saved to your PC, click on the link (H) ‘Upload Expense Fixed Assets’ in step 2.
Registering Equipment between $1K and $5K

Assets – Additions Integrator is displayed
(B) Continue
(B) Browse to the save text file
Locate the file you saved to your PC and select the file.

(B) Open
Registering Equipment between $1K and $5K

(B) Continue
(B) Create Document
Registering Equipment between $1K and $5K

-when prompted to open or save the file click on (B) open
(B) Enable Macros
The processing document window is displayed, **DO NOT** click on cancel.
(B) Close
An excel spreadsheet is displayed with lines of equipment purchased. The following fields need to be entered (as a minimum), for each line:

1. Category
2. Sub Category
3. Tag Number
4. Serial Number

Optional fields to enter (if you have the information) are;
1. Manufacturer Name
2. Model Number

Check the following fields to make sure the information that is auto-populated is correct – Make amendments if necessary.

1. Description
2. Cost
3. Location (Campus, Building, Room)
4. Employee

If you need to widen a column to view information hiding (e.g. in the description field) you need to go in to Tools > Protection > Unprotect sheet.
Double click in Sub Category field on first line to view List of values (LOV)
Registering Equipment between $1K and $5K

(B) LOV for Major Category
Select the same value that is in the spreadsheet for major category and click (B) select
(B) Combinations
Select a sub category that relates to the line item, if it isn’t there click on (H) ‘Next 10’ to view more combinations.
Select the sub category (in this case printer) and then (B) select
(B) Select
Registering Equipment between $1K and $5K

(B) Select
The correct category and sub category is displayed for that line.

Copy and Paste the Category and Sub category for the first line down to remaining lines (if the same) otherwise repeat process to select appropriate combination for each line.
The results of the copy and paste are shown

Scroll across to the right until you see the ‘Tag Number’ field
Type in the Tag Number (Barcode) into each line
And also type in the Serial Number of the equipment on each line.

**Note**: The Tag Number and the serial number are unique for each line – the system will not accept duplicate entries for these fields
The Tag Numbers and Serial Numbers are displayed

Note: The Tag Number and the serial number are unique for each line – the system will not accept duplicate entries for these fields
Registering Equipment between $1K and $5K

Type in the Manufacturer eg ‘Sharp’ on each line
Type in the Model eg ‘Colourjet’

Copy and Paste to all lines.

Results are displayed
Registering Equipment between $1K and $5K

To check and change the Employee (ownership) of the equipment,

Double click to view LOV (List of Values)
List of employees are displayed

Change search by to ‘Name”

Type in employee surname with % in this case %Scally%

(B) Go
Results of search are displayed

Select SCALLY, Janine, and click on (B) Select
Employee 41 is displayed for that line
Once all the fields have been completed and checked:
(M) ‘Oracle’ on main excel taskbar, and then select ‘Upload’
Create assets upload window is displayed

(B) Upload
Processing Upload window is displayed – **DO NOT** click on cancel
If an error comes up like the one above, click on (B) ‘Close’ and view error messages at the far right of spreadsheet. The error messages indicate which field is correct and why.

Update relevant fields and ‘upload’ the spreadsheet again.
Confirmation Upload screen is displayed, the registration of the assets is complete, click on (B)
Close

If errors still remain and you are unsure what you need to do, please call the Senior Finance
Officer – Fixed Assets ext 2290
Green smiley icons appear next to the ‘messages field’
Close Microsoft Excel – save if desired (not necessary)

Asset registration is now complete. You will not receive any more email notifications in regards to this requisition.
Guided Demonstration - Registering Equipment Between $1k and $5k

1. Save attachment to your PC.

2. (H) ‘Upload Expense Fixed Assets’
   Assets – Additions Integrator is displayed.

3. (B) ‘Continue’

4. (B) ‘Browse’ to select the save text file

5. Locate the file you saved to your PC, and select the file.

6. (B) Open

7. (B) Continue

8. (B) Create Document

9. (B) Open when prompted to open or save the file

10. (B) Enable Macros
    The processing document window is displayed, DO NOT click on cancel

11. (B) Close
    Excel spreadsheet is displayed with lines of equipment purchased.

12. Double click in Sub Category field on first line to view List of values (LOV).

13. (B) LOV for Major Category

14. Select the same value that is in the spreadsheet for major category and click (B) select

15. (B) ‘Combinations’

16. Select a sub category that relates to the line item, if it isn’t there click on (H) ‘next 10’ to view more combinations.

17. Select the sub category (in this case printer) and then click (B) select

18. (B) Select

19. (B) Select
    The correct category and sub category is displayed for that line.
20. Copy and Paste the Category and Sub category for the first line down to remaining lines (if the same) otherwise repeat process to select appropriate combination for each line.

21. Complete all fields.

22. (M) ‘Oracle’ on main Excel toolbar, and then select ‘Upload’

23. ‘Create assets upload’ window is displayed

24. (B) Upload

Processing Upload window is displayed – DO NOT click on cancel.

25. If an error comes up like the one above, click on (B) Close and view error messages at the far right of spreadsheet.

26. Update relevant fields and upload the spreadsheet again.

Confirmation Upload screen is displayed, the registration of the assets is complete.

27. (B) Close
After this lesson, you should have learned about:

- Completing the registration of equipment purchases (Assets).
Oracle 11i iAssets: Search for Assets and View Additional Information

Chapter 3
Oracle 11i iAssets: Search for Assets and View Additional Information
Lesson Objectives

After this lesson, you should be able to:

- Search for assets and view additional information relating to those assets.
Demonstration

**Search for Assets and View Additional Information**

**Exercise – Search for Assets and View Additional Information**

In this exercise users will be shown how to view all assets and also how to search more specifically using various searchable fields.

Users will learn how to ‘drill down’ to view additional information relating to individual assets, information such as Depreciation, Transaction history, and Assignments information (which employee and location are assigned to the asset).

This may often be the tool used to view asset information before doing a transfer in iAssets.
Search for Assets and View Additional Information

Responsibility: ECU iAssets User
(N) Global Assets Information > View All Assets
Search for Assets and View Additional Information

The Asset Search window is displayed

(B) Search to view all assets
Message pops up saying the search could take a long time

(B) OK
All records are displayed (In this case 1-25 of 85)
(B) ‘All 85’ to view all on one page (you can scroll down to each)
All 85 assets are displayed.

This is the asset number highlighted in blue and underlined (hyperlinked) to drill down and view information pertaining to that asset, in this example, asset number 100025.

Click on hypertext links to drill down to detailed information. Once a link is followed more detailed information is displayed. This may be repeated as many times as necessary.
Information relating to the asset is displayed.

(B) Assignments button to view the employee assigned to the asset and its current location.
Assignment details are displayed.
(B) ‘Back’ on the internet navigator toolbar.

(B) Books button to view information relating to the Cost of the Asset.
The cost of this asset can be viewed as $28,900.
(H) ‘ECU’ to view information relating to Depreciation, Transactions, and Cost History.
(B) ‘Depreciation’ to view how much depreciation has been charged to the asset.
Depreciation information can be displayed.
(B) ‘Back’ on the internet navigator toolbar.
(B) ‘Transactions’ to view transaction history relating to the asset (i.e. Additions/Transfers).
Transaction History is displayed
Click on a transfer type (e.g. (H) Addition) to view details regarding that transaction
Addition details can be viewed.

(T) Search-List of Assets view to start a new search if required.
Guided Demonstration - Search for Assets and view additional information

Responsibility: ECU iAssets User

1. How to find the additional information attached to a given asset.

2. (N) Global Assets Information > View All Assets.

3. (B) Search to view all assets.

4. (B) OK to Message saying the search could take a long time.

5. All records are displayed (In this case 1-25 of 85).

6. (B) ‘All 85’ to view all on one page (you can scroll down to each).

7. All 85 assets are displayed

8. (H) ‘100025’ – this is the asset number highlighted in blue and underlined (hyperlinked) to drill down and view information pertaining to that asset, in this example asset number 100025 – “Vehicle Monaro”.

9. Information relating to the asset is displayed.

10. (B) ‘Assignments’ to view the employee assigned to the asset and its current location.

11. Assignment details are displayed.


13. (B) ‘Books’ to view in formation relating to the Cost of the Asset.

14. The cost of this asset can be view as $28,900.

15. (H) ‘ECU’ to view information relating to Depreciation, Transactions, and Cost History.

16. (B) ‘Depreciation’ to view how much depreciation has been charged to the asset.

17. Depreciation information can be displayed.

18. (B) ‘Back’ on the internet navigator toolbar.

19. (B) ‘Transactions’ to view transaction history relating to the asset (i.e Additions/Transfers).

20. Transaction History is displayed.

21. (H) ‘Addition’ transfer type to view details regarding that transaction.

22. Addition details can be viewed.

23. (T) Search-List of Assets view to start a new search if required.
Search for Assets and View Additional Information
Guided Demonstration - Execute a Requisition Inquiry
Search for Assets and View Additional Information
Guided Demonstration - Execute a Requisition Inquiry
Search for Assets and View Additional Information

Overview
In this practice you will search for an asset by Tag number and view additional information relating to Depreciation, Assignments and Transaction History.

Assumptions
You must have access to the training database to complete this practice.
Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks
Log on to the system
- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU iAssets User

(N) Global Assets Information > View All Assets
Search for an asset with Tag Number TEST666

Q1. What is the Asset Number for this Asset? _____________________________
Q2. Which Employee is the Asset Assigned to? _______________________________
Q3. What is the Depreciation Method for this Asset? __________________________
Q4. What is the Period Effective of the ‘Addition’? ___________________________
Guided Demonstration - Execute a Requisition Inquiry Search for Assets and View Additional Information

**Responsibility: ECU iAssets User**

(N) Global Assets Information > View All Assets

From the ‘Asset Number’ drop down box select ‘Tag Number’

Type the tag number in as TEST666, and click on Search Tab

A1) 100104

A2) Greg Gibbard ((B) Assignments)

A3) STL ((B) Books, and then (H) ECU)

A4) Dec-87 ((B) Transactions)
After this lesson, you should have learned about:

- Searching for assets and view additional information relating to those assets.
Oracle 11i iAssets: Search for Assets and Download to Microsoft Excel
Lesson Objectives

After this lesson, you should be able to:

- Search for assets and download information to Excel.
Demo – Search for Assets and Download to Microsoft Excel

In this exercise users will be shown how to search for all assets by employee, and other searches and how to download the results into Microsoft excel format for saving and editing later.
Search for Assets and Download to Microsoft Excel

Click on ECU iAssets User responsibility
Click on View Assets by Employees
The Asset Search window is displayed.

(B) Search to view all assets.
Message pops up saying the search could take a long time.

(B) OK
All records are displayed (In this case 1-25 of 87).
(B) ‘All 87’ to view all on one page (you can scroll down to each).
All 87 Assets are displayed.

(B) Print to print out the complete list.
Or (B) Arrow to Export
Search for Assets and Download to Microsoft Excel

All Assets have been downloaded
Right click on the cell between A and 1 (as shown) and select ‘Copy’
Open a blank excel document and right click on the same button and select ‘Paste’
Search for Assets and Download to Microsoft Excel

All assets are displayed in Excel.
Save your Excel workbook if desired.
Guided Demonstration - Search for Assets and view additional information

Responsibility: ECU iAssets User

1. (N) Global Assets Information > View Assets by Employees.
2. (B) Search to view all assets.
3. Message pops up saying the search could take a long time.
4. (B) OK.
5. All records are displayed (In this case 1-25 of 87).
6. (B) ‘All 87’ to view all on one page (you can scroll down to each).
7. All 87 Assets are displayed.
8. (I) to print out the complete list or (I) to Export to Excel.
9. All Assets have been downloaded.
10. Right click on the cell between A and 1 (as shown) and ‘Copy’ (I).

11. Open a new Excel document and right click on the same cell and select ‘Paste’ (I).
12. All assets are displayed in Excel.
13. Save your Excel workbook if desired (I).
Search for Assets and Download to Microsoft Excel
Guided Demonstration - Execute a Requisition Inquiry Search for Assets and Download to Microsoft Excel
Guided Demonstration - Execute a Requisition Inquiry Search for Assets and Download to Microsoft Excel

Overview

In this practice you will search for an asset by Location and view additional information relating to the assets description and cost, you will also practice downloading a screen to MS Excel.

Assumptions

You must have access to the training database to complete this practice.

Where XX is referenced, you will use the number shown on the training terminal you are using

Tasks

Log on to the system

- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU iAssets User

(N) Global Assets Information > View Asset Locations

Search for an asset with Location JO.02.212

Q1. What is the Asset Description for this Asset? _____________________________

Q2. Which is the Cost of the Asset? _______________________________

Download the Assets ASSIGNMENTS screen in to Microsoft excel

Q3. What cell is “Lovett, Colin” displayed? _____________________________
Guided Demonstration - Execute a Requisition Inquiry Search for Assets and Download to Microsoft Excel

Responsibility: ECU iAssets User

(N) Global Assets Information > View Asset Locations

From the ‘Asset Number’ drop down box select ‘Location’

Type the Location in as JO.02.212, and click on Search Tab

A1) EXECUTIVE OFFICE EQUIPMENT

A2) $2,100 ((H) XX Asset 1 and then click on (B) Books)

A3) B3 ( (B) Assignments, and then (I)Download to excel
After this lesson, you should have learned about:

- Searching for the assets and downloading information to Excel.
Oracle 11i iAssets: Transfer Asset from One Employee to Another

Chapter 5
Oracle 11i iAssets: Transfer Asset from One Employee to Another
Lesson Objectives

After this lesson, you should be able to:

- Transfer assets from one employee to another
Transfer Asset from One Employee to Another

Joe Smith
Employee 27

Sandy Banks
Employee 234

**iAssets Demo – Transfer Assets from one Employee to another**

In this exercise users will be shown how to transfer the ownership of an asset (who the asset is assigned to) from one employee to another using the iAssets system. There are 4 steps to complete the transfer and these are shown in detail.
Responsibility: ECU iAssets User

(N) iAssets User: iAssets Home > iAssets Home
Transfer Asset from One Employee to Another

The iAssets home page is displayed.

(T) Asset Search Tab

Searching in iAssets

Simple Search

Use the Simple Search page to search for assets. You must enter at least one of the search criteria listed on the simple search page, but can enter as many as you like. The more information you enter, the more precise your search results will be.

Advanced Search

The Advanced Search page allows you to enter more specific information about assets than does the Simple Search page. You can search on any of the fields listed on the page, as well as add additional fields on which to conduct your search by choosing additional fields from the Add Another list. You can also narrow your search for each field. For example, if you search by asset number, you can search for a specific asset number, or an asset number that contains, starts with, or ends with a particular set of numbers.
Transfer Asset from One Employee to Another

The Asset Search tool is displayed
In the Asset number field type in the Asset Number from your previous search (Global Assets Search) or % if you don’t have it
Click on the torch to view all assets
Transfer Asset from One Employee to Another

If you have chosen to view all assets:

(I) ‘Quick Select’ next to the asset you want to transfer (In this case SKB ASSET 1)

Note: If the asset you are searching for is not displayed there are more assets on the next page click on (H) next 10
Transfer Asset from One Employee to Another

(B) Go
(B) Tick the Select box
(B) Add to Asset List

Creating an Asset List

You create an asset list by searching for assets and adding them to an asset list. On the Asset List page, you can continue searching for additional assets, remove assets from the list, save the list for later use, or create a transfer request.
Transfer Asset from One Employee to Another

(B) Create Transfer Request
Transfer Asset from One Employee to Another

In the Purpose box, insert text relating to the purpose of the transfer (in this case type in Test Transfer employee).

Create Transfer Request: Request Details
This is the first step of the transfer request process. The following table shows the field and button names on this page, along with their descriptions:

Field or Button Description
Preparer - This field shows the person who is logged into Oracle iAssets, and is always read only.
Requester - The person for whom this transfer request is being created. For example, the user may be submitting a request for his or her manager. The value defaults to the preparer.
Effective Transfer Date - You can enter a date in this field if it has been configured by the Oracle iAssets system administrator. You can enter the current date or a past date within the current fiscal year. Future dates are not allowed. If this field has not been configured by the iAssets system administrator, it is read only and always says Upon Approval.
Purpose - The reason for creating the transfer request. This field is required.
Transfer Asset from One Employee to Another

Tick the Select checkbox

(B) Next
Type in the Employee the asset is being transferred to in this case “Patrick Burke” – use torch for LOV if necessary.

(B) Next.

**Create Transfer Request: Destination Details**

This is the third step of the transfer request process. This page shows request information at the top, and a table with updatable fields to enter the destination information. You can change the information in the Location and Employee fields. You must change the information in at least one of these fields.
Review the ‘From Employee’ and ‘To Employee fields’.

(B) ‘Submit’. If the transfer is incorrect click on (B) ‘Back’ and repeat earlier steps.

Create Transfer Request: Review
This is the fourth and final step of the transfer request process. On this page, you can review the changes you have made through the transfer process. If you are not satisfied with the changes, you can click on the Back button to return to previous pages and make additional changes.
Transfer Asset from One Employee to Another

The request submits successfully.
Guided Demonstration - Transfer Assets from one Employee to another
Guided Demonstration - Transfer Assets from one Employee to another

Responsibility: ECU iAssets User

1. (N) iAssets User : iAssets Home > iAssets Home

2. The iAssets home page is displayed.

3. (T) Asset Search

4. The Asset Search tool is displayed

5. In the Asset number field type in the Asset Number from your previous search (Global Assets Search) or % if you don’t have it

6. (I) to view all assets

7. If you have chosen to view all assets:

8. (I) ‘Quick Select’ next to the asset you want to transfer (In this case SKB ASSET 1) Note. If the asset you are searching for is not displayed there are more assets on the next page click on (H) next 10

9. (B) ‘Go’

10. Tick the Select box

11. (B) ‘Add to Asset List’

12. (B) ‘Create Transfer Request’

13. In the Purpose box, insert text relating to the purpose of the transfer (in this case type in “Test transfer employee”).

14. If you would like to add an attachment to the transfer for future reference click on (B) ‘Add Attachments’ (see next exercise).

15. (B) ‘Next’

16. Tick the Select checkbox

17. (B) ‘Next’

18. Type in the Employee the asset is being transferred to in this case “Patrick Burke” – use torch for LOV if necessary.

19. (B) Next.
20. Review the ‘From Employee’ and ‘To Employee’ fields and click if ok click (B) ‘Submit’. If the transfer is incorrect click on (B) ‘back’ and repeat earlier steps.

21. The request submits successfully.
Transfer Asset from One Employee to Another
Practice - Transfer an Asset from One Employee to another using iAssets
Practice - Transfer an Asset from One Employee to another using iAssets

Overview

In this practice you will search for an asset by Asset Number and view assignment (ownership) information relating to the asset and transfer the asset to a new Employee.

Assumptions

You must have access to the training database to complete this practice.

Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system

- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU iAssets User

(N) iAssets User : iAssets Home > iAssets Home

Search for an asset with Asset Number “TP ASSET 1”

Transfer the Employee from its current to “Pelham, Stephen”

The Purpose of the transfer should be “Practice transfer asset ownership” in Step 1

Q1. What is the Current Employee for this Asset? _____________________________

Q2. Did you get passed the 4 Steps and Submit the Transfer? ___Yes / No________
Practice - Transfer an Asset from one employee to another using iAssets

Responsibility: ECU iAssets User

(N) iAssets User : iAssets Home > iAssets Home

A1) Tracey Carroll (T) Asset Search Tab, in the Asset Number box, type in TP ASSET 1, click on go, the assets details are displayed, Employee can be viewed).

A2) Hopefully YES!

When viewing asset details from A1) above tick the select box on (B) Add to Asset List, Click on (B) Create transfer request.

Type in purpose as per Q) (“Practice transfer asset Ownership”).

(B) ‘Next’

(B) ‘Next’

Type in “Pelham, Stephen” in the ‘To Employee box’ (In replace of Tracey Carroll)

(B) ‘Next’

(B) ‘Submit’.
After this lesson, you should have learned about:

- Transferring assets from one employee to another.
Oracle 11i iAssets: Transferring Assets from One Location to Another

Chapter 6
Oracle 11i iAssets: Transfer Assets from One Location to Another
Lesson Objectives

After this lesson, you should be able to:

- Transfer assets from one location to another
i-Assets Demo – Transfer Assets from one Location to another

Assets may move in physical location and the owner of the asset needs to update the iAsset system to show this movement.

In this exercise users will be shown how to transfer the asset from one location to another using the iAssets system.

There are 4 steps to complete the transfer and these are shown in detail in this exercise.

Users are also shown how to add an attachment to a transfer (as a working document) to reference later.
Transfer Asset from One Location to Another

Responsibility: ECU iAssets User
(N) iAssets User : iAssets Home > iAssets Home
Transfer Asset from One Location to Another

The iAssets home page is displayed.

(T) Asset Search Tab.
Transfer Asset from One Location to Another

The Asset Search tool is displayed.

In the Asset number field type in the Asset Number from your previous search (Global Assets Search) or % if you don’t have it

(I) Torch to view all assets
If you have chosen to view all assets;
(B) ‘Quick Select’ next to the asset you want to transfer (In this case SKB ASSET 1).
Transfer Asset from One Location to Another

(B) Go
Tick the Select box
(B) Add to Asset List
Transfer Asset from One Location to Another

(B) Create Transfer Request
Transfer Asset from One Location to Another

Insert text relating to the purpose of the transfer (In this case) type in “Training transfer asset Location”.
If you would like to add an attachment to the transfer for future reference click on (B) ‘Add Attachments’.
(B) Browse to add a file saved currently on your PC

**Attachments**

To add a desktop file, text or URL as an attachment:

- Set the Add poplist to Desktop File/ Text/ URL.(Default)
- Enter a description. (mandatory field)
- Specify the attachment type. If the document is a file, select File and specify the location of the document. You can use the Browse button to help you locate the file. The document is then loaded into the database. If the document is a Web page, select URL and specify the Web page URL, such as http://www.oracle.com. If the document is text, select Text and enter the text in the text box. The text box stores the text in the database as short text, which can contain up to 2000 characters. Specify a name to help identify the text you enter.
- If you have another attachment you wish to add, choose Add Another to save the current attachment and clear the page so you can add another attachment. Note that your prior attachment(s) are saved, but not committed to the database.
Select file you require for attachment.

(B) ‘Apply’.
The attachment is now displayed on screen.

(B) ‘Next’.
Tick the select box

(B) Next
(B) Update Location
Transfer Asset from One Location to Another

Current Location of the asset is displayed.
Retype over the Campus, Building and Room with new Locations.
(1) Torch if necessary for list of values.
Retype over the Campus with “CH”, Building with “01” and Room with “101”.
(I) Torch if necessary for list of values.
(B) Apply.
Transfer Asset from One Location to Another

MANAGEMENT SERVICES CENTRE

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Review the ‘From Location’ and ‘To Location’ fields and if ok click (B) ‘Submit’. If the transfer is incorrect click on (B) ‘back’ and repeat earlier steps.
Transfer Asset from One Location to Another

The request submits successfully
Guided Demonstration - Transfer Assets from one Employee to another
Guided Demonstration - Transfer Assets from one Employee to another

Responsibility: ECU iAssets User

1. (N) iAssets User : iAssets Home > iAssets Home

2. The iAssets home page is displayed.

3. (T) Asset Search

4. The Asset Search tool is displayed

5. In the Asset number field type in the Asset Number from your previous search (Global Assets Search) or % if you don’t have it

6. (I) to view all assets

7. If you have chosen to view all assets:

8. (I) ‘Quick Select’ next to the asset you want to transfer (In this case SKB ASSET 1)

   Note. If the asset you are searching for is not displayed there are more assets on the next page click on (H) next 10

9. (B) ‘Go’

10. Tick the Select box

11. (B) ‘Add to Asset List’

12. (B) ‘Create Transfer Request’

13. In the Purpose box, insert text relating to the purpose of the transfer (in this case type in “Test transfer employee”).

14. If you would like to add an attachment to the transfer for future reference click on (B) ‘Add Attachments’ (see next exercise).

15. (B) ‘Next’

16. Tick the Select checkbox

17. (B) ‘Next’

18. Type in the Employee the asset is being transferred to in this case “Patrick Burke” – use torch for LOV if necessary.

19. (B) Next.
20. Review the ‘From Employee’ and ‘To Employee’ fields and click if ok click (B) ‘Submit’. If the transfer is incorrect click on (B) ‘back’ and repeat earlier steps.

21. The request submits successfully.
Transfer Asset from One Location to Another

Practice
Transfer Assets from One Location to Another
Guided Demonstration - Execute a Requisition Inquiry
Transfer an Asset from one location to another using iAssets
Guided Demonstration - Execute a Requisition Inquiry Transfer an Asset from one location to another using iAssets

Overview

In this practice you will search for an asset by Asset Number and view Location information relating to the asset and transfer the asset to a new location.

Assumptions

You must have access to the training database to complete this practice.

Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system

- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU iAssets User

(N) iAssets User : iAssets Home > iAssets Home

Search for an asset with Asset Number “AT ASSET 2”

Transfer the location from its current location to CH.01.101

The Purpose of the transfer should be “Practice transfer asset location” in Step 1

Q1. What is the Current Location for this Asset? _____________________________

Q2. Did you get passed the 4 Steps and Submit the Transfer? ___Yes / No__________
Guided Demonstration - Execute a Requisition Inquiry Transfer an Asset from one location to another using iAssets

Responsibility: ECU iAssets User

(N) iAssets User : iAssets Home > iAssets Home

A1) JO.04.212 ( (T) Asset Search Tab, in the Asset Number box, type in AT ASSET 2, click on go, the assets details are displayed, Location can be viewed)

A2) Hopefully YES!

When viewing asset details from A1) above tick the select box on (B) Add to Asset List, Click on (B) Create transfer request

Type in purpose as per Q) (“Practice transfer asset location”)

(B) ‘Next’

(B) ‘Next’

(B) ‘Update location’

Type in ‘Campus’ as CH, Type in ‘Building’ as 01, Type in Room as 101. (As per Q)

(B) ‘Apply’

(B) ‘Next’

(B) ‘Submit’
After this lesson, you should have learned about:

- Transferring assets from one location to another
Oracle 11i iAssets: Disposal

Chapter 7
Oracle 11i iAssets: Disposal
Lesson Objectives

After this lesson, you should be able to:

- Dispose of assets using iAssets.
### Disposal Procedure

**Form 380**

Form 380 can be accessed from the following URL:


**Contacts for Facilities Management Office are:**

- **Bunbury**  
  Brian Ewart / Mike Groom Ext 7737 / 7762
- **Churchlands**  
  Andy Smith  
  Ext 8727
- **Joondalup**  
  Stewart Cleal Ext 5506
- **Mt Lawley**  
  Karen Knowles Ext 6678

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Oracle 11i iAssets: Disposal  
Revision V 1.0  
Effective: 15 January 2006  
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iAssets Exercise – Disposal of Assets

In this exercise users will learn how to Dispose of an asset using the iAssets system. This is done by transferring the location of the assets ‘Building’ from its current location to ‘DISPOSAL’. The process is similar to that of the previous exercise ‘Transfer Assets from one location to Another’.
Disposal of Assets

Responsibility: ECU iAssets User

(N) iAssets User : iAssets Home > iAssets Home
Disposal of Assets

The iAssets home page is displayed.

(T) Asset Search Tab.
Disposal of Assets

The Asset Search tool is displayed

In the Asset number field type in the Asset Number from your previous search (Global Assets Search) or % if you don’t have it.

(I) Torch – to view all assets.
If you have chosen to view all asset.

(B) ‘Quick Select’ next to the asset you want to transfer (In this case SKB ASSET 1).

Note: If the asset you are searching for is not displayed there are more assets on the next page click on (H) next 10
Disposal of Assets

(B) Go
Tick the Select box
(B) Add to the Asset List
(B) Create Transfer Request.
Disposal of Assets

In the Purpose Box, insert text relating to the purpose of the transfer (in this case type in “dispose of asset”)

If you would like to add an attachment to the transfer for future reference click on (B) ‘Add Attachments’ (see previous exercise).

(B) Next.
Tick the Select checkbox
(B) ‘Next’.
Disposal of Assets

(B) Update Location
Disposal of Assets

Current location of the asset is displayed.

Retype over the Building with “DISPOSAL”.

Use Torch if necessary for list of values.

(B) Apply

(B) Next
Disposal of Assets

(B) Next
Disposal of Assets

Review the ‘From Location’ and ‘To Location’ fields and if ok click (B) ‘Submit’. If the transfer is incorrect click on (B) ‘back’ and repeat earlier steps.
Disposal of Assets

The request submits successfully!
Guided Demonstration - Transfer Assets from One Location to Disposal
Guided Demonstration - Transfer Assets from One Location to Disposal

Responsibility: ECU iAssets User

1. (N) iAssets User : iAssets Home > iAssets Home

2. The iAssets home page is displayed.

3. (T) Asset Search

4. The Asset Search tool is displayed

5. In the Asset number field type in the Asset Number from your previous search (Global Assets Search) or % if you don’t have it

6. (I) to view all assets

7. If you have chosen to view all assets:

8. (I) ‘Quick Select’ next to the asset you want to transfer (In this case SKB ASSET 1)
   
   Note. If the asset you are searching for is not displayed there are more assets on the next page click on (H) next 10

9. (B) ‘Go’

10. Tick the Select box

11. (B) ‘Add to Asset List’

12. (B) ‘Create Transfer Request’

13. In the Purpose box, insert text relating to the purpose of the transfer (in this case type in “Dispose of Asset”).

14. If you would like to add an attachment to the transfer for future reference click on (B) ‘Add Attachments’ (see next exercise).

15. (B) ‘Next’

16. Tick the Select checkbox

17. (B) ‘Next’

18. (I) Update Location.

19. Current location of the asset is displayed. Re-type over the Building with “DISPOSAL”
20. (B) Apply.

21. (B) Next.

22. Review the ‘From Location’ and ‘To Location’ fields and click if ok click (B) ‘Submit’. If the transfer is incorrect click on (B) ‘back’ and repeat earlier steps.

23. The request submits successfully.
Disposal of Assets
Practice - Transfer an Asset from One Location to Disposal
Practice - Transfer an Asset from One Location to Disposal

Overview

In this practice you will search for an asset by Asset Number and view Location information relating to the asset and Dispose of the asset (Transfer location to disposal)

Assumptions

You must have access to the training database to complete this practice.

Where XX is referenced, you will use the number shown on the training terminal you are using.

Tasks

Log on to the system

- Username = ecutrnXX
- Password = ecutrnXX
- Responsibility = ECU iAssets User

(N) iAssets User : iAssets Home > iAssets Home

Search for an asset with Asset Number “TSASSET3”

Transfer the locations building from its current building location to “DISPOSAL”

The Purpose of the transfer should be “Practice asset disposal” in Step 1

Q1. What is the Current Location for this Asset? _____________________________

Q2. Did you get passed the 4 Steps and Submit the Transfer? ___Yes / No__________
Practice - Transfer an Asset from One Location to Disposal

Responsibility: ECU iAssets User

1. (N) iAssets User : iAssets Home > iAssets Home

2. A1) JO.08.425 ( (T) Asset Search Tab, in the Asset Number box, type in AT ASSET 2, click on go, the assets details are displayed, Location can be viewed)

3. A2) Hopefully YES!

4. When viewing asset details from A1) above tick the select box on (B) Add to Asset List, Click on (B) Create transfer request

5. Type in purpose as per Q) ( “Practice transfer asset location”)

6. Click on (B) Next,

7. Click on (B) Next,

8. Click on (B) Update location,

9. Type in ‘Building’ as “DISPOSAL”. (Note. Campus and room do not need to be changed)

10. Click on (B) Apply,

11. Click on (B) next,

12. Click on (B) Submit.
After this lesson, you should have learned about:

- Transfer locations from one location to disposal