## Table of Contents

### iAssets - Overview
- Course Objectives ........................................................................................................... 1-3
- Oracle 11i - Abbreviations ................................................................................................. 1-4
- Who is responsible for Assets and Why ........................................................................... 1-6
- Benefits of Asset Tracking ................................................................................................. 1-7
- What are your responsibilities? ......................................................................................... 1-9

### iAssets - Registering Assets Between $1k and $5k
- Agenda ................................................................................................................................. 2-1
- Registering Equipment ..................................................................................................... 2-3
- Macros in Excel ................................................................................................................ 2-4
- Receiving Email Notification .......................................................................................... 2-5
- Registering Equipment between $1K and $5K ................................................................. 2-7
- Practice - Registering Assets between $1K and $5K ....................................................... 2-8
- Solution – Registering Assets between $1K and $5K ....................................................... 2-9

### iAssets - Search, View and Download Asset Information
- Lesson Objectives ............................................................................................................. 3-1
- Search for Assets and View Additional Information ....................................................... 3-2
- Practice ............................................................................................................................... 3-4
  - Practice - Search for assets and view additional information ........................................ 3-16
  - Solution - Search for assets and view additional information ........................................ 3-17
- Download Search Results to Excel .................................................................................. 3-18
- Download Search Results to Excel .................................................................................. 3-20
- Download Search Results to Excel .................................................................................. 3-21
- Download Search Results to Excel .................................................................................. 3-23
- Practice ............................................................................................................................... 3-24
  - Practice - Download search results to Excel ................................................................. 3-25
  - Solution - Download search results to Excel ................................................................. 3-26

### iAssets - Transfer Assets
- Agenda .................................................................................................................................. 4-1
- iAssets Employee Transfer ............................................................................................... 4-3
- Transfer an Asset between Employees ........................................................................... 4-5
- Transfer an Asset between Employees – Asset Search .................................................... 4-6
- Transfer an Asset between Employees – Select Asset ..................................................... 4-7
- Transfer an Asset between Employees – Select Assets ................................................... 4-8
- Transfer an Asset between Employees – Creating Transfer Request ......................... 4-9
- Transfer an Asset between Employees – Request Details ............................................... 4-10
- Transfer an Asset between Employees – Releasing Details .......................................... 4-11
- Transfer an Asset between Employees – Destination Details ....................................... 4-12
- Transfer an Asset between Employees – Review ......................................................... 4-13
- Transfer an Asset between Employees – Confirmation .................................................. 4-14

---

Copyright © Oracle, 2004. All rights reserved.

iAssets Training Course Table of Contents
iAssets - Overview

Chapter 1
iAssets
Course Objectives

After this course, you should be able to:

- Complete the registration of Equipment Purchases (Assets)
- Search for Assets and export search results to Excel
- Transfer Assets between Employees
- Transfer Assets between Locations
- Understand the Disposal/Write off process for Assets

Course Overview

This course discusses the basic features of Asset Management within Oracle Applications 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 using iAssets.

You will also be reviewing some new functionality such as exporting reports to excel. This 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.
Some common abbreviations used in this course:-

- (M) = Menu
- (B) = Button
- (Help) = Oracle Online Help Screens
- (N) = Navigator
- (I) = Icon
- (T) = Tab
- LOV = List of Values
- (H) = Hyperlink

**Common Abbreviations**

During this training session and any future training sessions you will come across some standard menu path abbreviations that are used through the Oracle 11i documentation.
iAssets - Overview
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

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 to ensure timely recording, tracking, reporting and disposal of University assets in accordance with established policies & procedures.
Benefits of Asset Tracking

- Business objectives
- Accountability and Audit
- Asset Safekeeping
- Plan for replacement
- Conforms with University Policy 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. For example SCIS and KITS 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. Using iAssets 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 University Policy 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.

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

The three 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.
Registering Equipment between $1k and $5k
After this lesson, you should be able to:

- Complete the registration of Equipment Purchases (Assets)
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 /Procurement.

It is generally the responsibility of the /Procurement 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 email will be received if the registration of the equipment has not been completed, and there will be subsequent e-mails daily until the registration is complete.

The steps to complete registration are highlighted in the e-mail, and these steps will be shown in detail in this chapter.
Macros in Excel

Preparation - Enable Macros in Excel

Before you can complete the registration of assets you need to enable macros in Excel; Open Microsoft Excel and select Tools > Macros > Security…
Enable Macros in Excel

To enable Macros:-
1. (T) Trusted Publishers
2. Tick the “Trust Access to Visual Basic Project” check box
3. (B) OK
4. Close Microsoft Excel
Receiving Email Notification

Email Notification
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.

To register the asset:-
1. Save the attachment to your PC
2. Click on the link (H) ‘Upload Expense Fixed Assets’ in step 2. This will open the Assets – Additions Integrator.

Note: It is recommended to create a new folder for these attachments so they can be found easily and are all located in the same place.
Assets – Additions Integrator

After clicking on the link at step 2 in the email (H) ‘Upload Expense Fixed Assets’ the Additions Integrator will be displayed

1. (B) Continue
Registering Assets – Upload Expense Fixed Assets

1. (B) Browse to find the attachment that you saved earlier.
Registering Assets – Locate Saved File

1. Locate the file you saved to your PC and select the file.
2. (B) Open
Registering Equipment between $1K and $5K

Registering Assets – Upload Expense Fixed Assets

When your saved file is listed in the local filename field
1. (B) Continue
Registering Assets – Review

1. (B) Create Document

TIP: If you receive a Microsoft Visual Basic error message, you need to enable Macro Security, please refer back to the previous section on Macros in Excel.
Registering Assets – Downloading the File

-when prompted to open or save the file

1. (B) open
2. (B) Enable Macros
Registering Assets – Creating Upload Spreadsheet

The processing document window is displayed, DO NOT click on cancel, once the document has been created, the window will ask you to close it.
Registering Assets – Confirmation of spreadsheet creation

When you receive the confirmation that the download was successful and the template has been created.

1. (B) Close
Registering Equipment between $1K and $5K

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 (Barcode)
4. Serial Number
5. Manufacturer Name
6. 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.

**Note:** You can double click in Category field on the first line to view the List of Values (LOV).
Registering Assets – Entering Categories

Double click in the Sub Category column on first line to view List of values (LOV)
Registering Assets – Selecting Categories

(B) LOV for Major Category
Registering Equipment between $1K and $5K

Registering Assets – Selecting Categories

Select the same value that is in the spreadsheet for major category and click (B) select
Registering Assets – Choosing Combinations

1. (B) Combinations
Registering Equipment between $1K and $5K

1. Select the sub category that relates to the line item

Note: if it isn’t there click on (H) ‘Next 10’ to view more combinations
Registering Assets – Selecting Categories

Once both the Major and Sub categories are completed
1. (B) Select
Registering Equipment between $1K and $5K

Registering Assets – Confirming Categories

Oracle will confirm that the category combination you have chosen is valid. Once you receive the confirmation above;

1. (B) Select
Registering Equipment between $1K and $5K

Registering Assets – Spreadsheet with Categories

The correct category and sub category is displayed for the line you have just completed.

Copy and Paste the Category and Sub category on the first line down to the remaining lines (if the same) otherwise repeat process to select appropriate combination for each line.
Registering Assets – Tag (Barcode) Numbers

Each asset must have the Tag (barcode) number entered against it so it can be easily located in the future.

Use the scroll bar at the bottom of Excel to scroll across to the right until you see the ‘Tag Number’ field.
Registering Assets – Entering Tag (Barcode) & Asset Numbers

Each asset must have a tag (barcode) and asset number assigned to assist in tracking of the asset in the future.

1. Type in the Tag (Barcode) Number into each line under the Tag Number column.
2. Type in the Asset Number of the equipment on each line under the Serial Number field.

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

Registering Assets – Entering Manufacturers Name

The manufacturers name must be listed for each item to help identify assets later on. Please note, this must be the Manufacturers name, not the suppliers name. They may be different.

1. Type in the Manufacturer’s Name eg ‘IBM’ on each line
2. Type in the Model eg ‘SOE Desktop Computer’
3. Copy and Paste to all lines, or if information differs, enter the information for each line.
Registering Equipment between $1K and $5K

Registering Assets – Assigning Employee

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

Double click on the first line in the Employee number column to view LOV (List of Values)

**Note:** The LOV defaults to an Oracle assigned staff number, this is not an actual payroll staff number. Please use the drop down menu to see staff names so you can choose the correct staff member if the asset is not assigned to yourself.
Registering Equipment between $1K and $5K

Registering Assets – Searching for an Employee

To assign the asset to an employee

1. Change the search by field to ‘Name” by using the drop down menu
2. Type in employee surname using the wildcard (%) at both start and finish of the surname. In this example %Gibbard%
3. (B) Go

Note: If the employee is not registered in Oracle, please default the employee name to your own and complete the registration process. Once registration is complete, please contact the Senior Finance Officer – Fixed Assets on ext 2290 to have the employee added to Oracle.
Registering Assets – Search for Employee

The results of the search are displayed

1. Select GIBBARD, Greg by clicking in radio button.
2. (B) Select
Registering Equipment between $1K and $5K

Registering Assets – Assigning Employee

The Oracle assigned Employee number is now displayed for that line.

If additional lines are also to be assigned to this employee, copy the information down to the lines as needed. If additional lines are to be assigned to different employees, repeat the steps for assigning employees until all are assigned correctly.
Registering Assets – Upload Spreadsheet

Once all the fields have been completed and checked:
1. (M) ‘Oracle’ on main excel taskbar
2. Select ‘Upload’
Registering Assets – Upload Window

The Create assets upload window is displayed
1. (B) Upload
Registering Equipment between $1K and $5K

Registering Assets – Processing Upload window

The Processing Upload window is displayed – DO NOT click on cancel, you will receive a confirmation window once the process has completed.
Registering Assets – Upload Errors

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 incorrect and why. Update relevant fields and ‘upload’ the spreadsheet again.

If errors still remain and you are unsure what you need to do, please call the Senior Finance Officer – Fixed Assets ext 2290
Registering Assets – Upload Confirmation

Once you receive the Confirmation Upload screen, the registration of the assets is complete, click on (B) Close
Registering Assets – Completed Upload

If the upload has completed successfully, you will have 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.
Practice - Registering Assets between $1K and $5K

Overview

In this practice you will register an asset using the email notification, excel and Oracle iAssets.

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.

- Username = trainXX
- Password = trainXX
- Responsibility = ECU iAssets Users

Tasks

Open Microsoft Outlook

Open the Asset email from Workflow

Save the attachment to your desktop

Complete the registration process
Solution – Registering Assets between $1K and $5K

Overview

In this practice you will register an asset using the email notification, excel and Oracle iAssets.

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.

- Username = trainXX
- Password = trainXX
- Responsibility = ECU iAssets Users

Tasks

• Open Microsoft Outlook
• Open the Asset email from Workflow
• Save the attachment to your desktop
• Complete the registration process

1. Save attachment to your PC.
2. (H) ‘Upload Expense Fixed Assets’. This will display the Assets – Additions Integrator.
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

*An 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 the appropriate listing isn’t there click on (H) ‘next 10’ to view more combinations.

17. Select the sub category and then click (B) select

18. (B) Select

19. (B) Select

*The correct category and sub category are 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’

*The ‘Create assets upload’ window is displayed*

23. (B) Upload

*The ‘Processing Upload window’ is displayed – DO NOT click on cancel.*

*If an error window comes up saying ‘No rows uploaded’, click on (B) Close and view error messages at the far right of spreadsheet.*

24. Update relevant fields and upload the spreadsheet again.

*The ‘Confirmation Upload’ screen is displayed, the registration of the assets is complete.*

25. (B) Close
After this lesson, you should have learnt to:

- Complete the registration of equipment purchases (Assets).
Search for Assets, View Additional Information and Download to Excel
Lesson Objectives

After this lesson, you should be able to:

- Search for assets and view additional information relating to those assets.
- Download search results to Excel
Search for Assets and View Additional Information

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

You 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.
To search for assets you must log in to the Oracle application:-
1. Responsibility: ECU iAssets Users
2. (N) Global Assets Information > View All Assets
Searching for Assets

The Asset Search window is displayed

1. (B) Search to view all assets

If you get an error message saying it could take a long time to search without entering any criteria

(B) Ok

If you are looking for a particular asset, or want to minimise the number of records returned, use the drop down boxes to enter in your search criteria.
Retrieved Records

Oracle will display all the records retrieved that match your search criteria. As we didn’t enter any search criteria, this will be all records.

All records are displayed (In this example 1-25 of 684)

If you want to view all records without going through the pages
1. (B) ‘All 684’ to view all on one page (you can scroll down each record)

The asset number is highlighted tin blue and is a hyperlink which allows you to drill down and view information pertaining to that asset.

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.
Asset Details Listing

After clicking (H) Asset Number, additional information relating to the asset is displayed.

If you want to view who the asset is assigned to:-
1. (B) Assignments button to view the employee assigned to the asset and its current location.
Asset Assignments

This screen will show who the asset is assigned to, the current location and the General Ledger charge account.

To return to the Asset Details Listing window
1. (B) ‘Back’ on the internet navigator toolbar.
To view Books information on the Asset

1. (B) Books to view information relating to the Cost of the Asset.
Books Window

The Books window will show the cost of the asset, along with any recoverable cost.

To view information relating to Depreciation, Transactions, and Cost History
1. (H) ECU
### Book Detail Listing

From this window you can view the depreciation, transactions and cost history of the asset.

**To view depreciation information**
1. (B) Depreciation

**To view Transaction information**
1. (B) Transactions

**To view Cost History information**
1. (B) Cost History

To cancel out of any of the above windows and return to the Book Detail Listing window, use the ‘Back’ button on your browser window.
Book Detail - Depreciation

To view depreciation information
1. (B) Depreciation

To return to the Book Detail Listing, use the ‘Back’ button on your browser window.
Search for Assets and View Additional Information

To view Transaction information
1. (B) Transactions
2. (H) Transaction type to see additional information about that transfer.
   The additional information available to view under the transaction type hyperlink are:
   - Retirements
   - Unplanned Depreciation
   - Assignments
   - Transactions
   - Reclass/Unit Adjustment
3. To return to the transfer window, use the ‘Back’ button on your browser window.

To return to the Book Detail Listing, use the ‘Back’ button on your browser window.
Search for Assets and View Additional Information

Book Detail – Cost History

To view Cost History information
1. (B) Cost History

To return to the Book Detail Listing, use the ‘Back’ button on your browser window.
Search for Assets and View Additional Information
Overview

In this practice you will search for an asset by asset 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 = trainXX
- Password = trainXX
- Responsibility = ECU iAssets Users

(N) Global Assets Information > View All Assets

Search for asset number 3002123

1. What is the description for this Asset? ________________________________
2. Which Employee is the Asset Assigned to? ________________________________
3. What is the Depreciation Method for this Asset? __________________________
4. What is the Period Effective of the ‘Addition’? ___________________________
Solution - Search for assets and view additional information

Responsibility: ECU iAssets Users

(N) Global Assets Information > View All Assets

Search for asset number 3002123

- Accept defaults and enter 3002123 in the asset number field
- (B) Search

1. What is the description for this Asset?  
   Unit Information Management System
   
   Note: Look under the description column on the List of Asset page.

2. Which Employee is the Asset Assigned to?  
   Gibbard, Greg
   
   Note: From the List of Asset page > (H) Asset number > (B) Assignments > look in the Assigned Name column.

3. What is the Depreciation Method for this Asset?  
   STL
   
   Note: From the List of Asset page > (H) Asset number > (B) Books > (H) ECU > look in the Depreciation Method column.

4. What is the Period Effective of the ‘Addition’?  
   Jun-05
   
   Note: From the List of Asset page > (H) Asset number > (B) Books > (H) ECU > (B) Transactions > look in the Period Effective column of the Addition line.
Download Search Results to Excel
Search for Assets

From Oracle eBusiness Suite:-
1. Choose the responsibility ECU iAssets Users from the Navigator menu
2. Choose (H) View Assets by Employee from the Global Assets Information sub heading from the Navigator functions list
3. Enter your search criteria into the Search – Asset Employees window
4. (B) Search

If you get an error message saying it could take a long time to search without entering any criteria
(B) Ok
Download Search Results to Excel

When the results of your search are displayed in the Asset Employees window you can use the icons in the top menu next to the screen name to either print the results or export them to Excel.

**To print the search results:-**
1. Click on the (I) Printer
2. Enter your print options
3. (B) Print

**To export search results to Excel:-**
1. Click on the (I) Export (the sheet of paper with a pink arrow)
2. (B) Open to the Excel file download window (see the next page for screenshot of the download window)
Exporting Search results to Excel

To export search results to Excel:-
1. Click on the (I) Export (the sheet of paper with a pink arrow)
2. (B) Open to the Excel file download window
3. Highlight the worksheet by clicking on the cell between column A and row 1 as shown in the screenshot above
4. Ctrl+C to copy the worksheet, or right mouse click > Copy
5. Open a blank Excel worksheet
6. Ctrl+V to paste, or right mouse click > Paste

You can now manipulate the data within Excel.
Download Search Results to Excel

Exporting Search Results to Excel

Your search results are now displayed in Excel.
Save your Excel workbook if desired.
In Excel you can now filter, sort or apply other criteria to your search results.
Search for Assets and Download to Microsoft Excel
Practice - Download search results to Excel

Overview

In this practice you will search for an asset assigned to an employee 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 = trainXX
- Password = trainXX
- Responsibility = ECU iAssets Users

(N) Global Assets Information > View Assets by Employee

Search for assets which are assigned to employee number 429

1. Download the asset information to Excel
Solution - Download search results to Excel

Responsibility: ECU iAssets Users

(N) Global Assets Information > View Assets by Employee

Search for asset number 3002123

- Change the first drop down menu from ‘Asset Number’ to ‘Employee Number’
- Change the second drop down menu from ‘Contains’ to ‘Is’
- Enter 429 in the blank field
- (B) Search

When the result of your search are displayed

- (I) Export to Excel
- (B) Open to the File Download window
- Highlight the entire sheet by clicking in the blank cell between column A and row 1
- Copy the sheet
- Open a blank Excel workbook
- Place cursor in cell A1
- Paste
- Save your document

You can now manipulate the data within Excel.
Summary

After this lesson, you should have learnt to:

• Search for assets and view additional information relating to those assets.

• Download search results to Excel
Transfer Assets between Employees or Locations
After this lesson, you should be able to:

- Transfer assets between employees
- Transfer assets between locations
Transfer an Asset between Employees
Transfer Asset from One Employee to Another

Joe Smith
Employee 27

Sandy Banks
Employee 234

Transfer Assets from one Employee to another

In this exercise you 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 in the following slides.
Transfer an Asset between Employees

To transfer an asset between employees:-
Responsibility: ECU iAssets Users
Choose iAssets Home from the iAssets Home sub menu on the Navigator
This will display the iAssets Home page
Transfer an Asset between Employees – Asset Search

On the iAssets Home Page
(T) Asset Search

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 an Asset between Employees – Select Asset

Transfer an Asset between Employees – Simple Search

First you will need to find the asset that you want to transfer.

Enter your search criteria into the appropriate fields, ie Asset number, staff name, serial number etc.
1. Click on the (I) Torch at the end of each field if you need to search the values of that field.
2. (B) Go when you have entered all your search criteria.
Transfer an Asset between Employees – Select Assets

Select your Asset

Once your search results are displayed
1. (B) Tick the Select box of the asset you want to transfer
2. (B) Add to Asset List

Creating an Asset List

You can 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 an Asset between Employees – Creating Transfer Request

Creating Transfer Request

If you have all the assets you wish to transfer shown on your Assets List
1. (B) Create Transfer Request

If you need to continue to search for more assets to add to the list
1. (B) Search for More Assets

If you want to save the list and work on it later
1. (B) Save for Later

For this exercise we will Create Transfer Request
Transfer an Asset between Employees – Request Details

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:

**Preparer** - This field shows the person who preparing the transfer. This field 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. This field is mandatory.

**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 is read only and always says Upon Approval.

**Purpose** - The reason for creating the transfer request. This field is mandatory.
Transfer an Asset between Employees – Releasing Details

The second step of transferring an asset is to check the releasing details, which are details where the asset is currently assigned and located.

Oracle will ask you to confirm the releasing details of the asset are correct:-
1. Tick the Select checkbox
2. (B) Next
Transfer an Asset between Employees – 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.

You will need to specify the details of the employee that the asset is being transferred to:
1. Select the line, or lines that you want to transfer
2. Type in the employee name the asset is being transferred to, or use (I) torch to search for the employee if necessary.

(B) Next
Transfer an Asset between Employees - 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.

1. Review the ‘From Employee’ and ‘To Employee fields’.
2. (B) ‘Submit’. If the transfer is incorrect click on (B) Back and repeat earlier steps until you are satisfied with the changes, then (B) Submit.
Transfer an Asset between Employees - Confirmation

You will receive a confirmation the request has submitted successfully.

Note: While you have completed the transfer process, there is a further process within FBSC which will effect the transfer. The transfer will not be immediately visible and may not be visible until after the month end processes are complete.
Transfer an Asset between Employees
Practice - Transfer an Asset between Employees

Overview

In this practice you will search for an asset by Asset Number and transfer the asset to a different 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 = trainXX
- Password = trainXX
- Responsibility = ECU iAssets Users

(N) iAssets User : iAssets Home > iAssets Home > (T) Asset Search

- Search for an asset with Asset Number 3002041
- Enter the purpose of transfer as ‘Employee moving Centres’
- Transfer the Asset from the current employee to ‘Gibbard, Greg’
- Submit
Solution - Transfer an Asset between Employees

Responsibility: ECU iAssets Users

(N) iAssets User : iAssets Home > iAssets Home > (T) Asset Search

Search for asset number 3002041

1. Enter 3002041 in the Asset Number field
2. (B) Go
3. Tick the checkbox to select the line
4. (B) Add to Assets List
5. (B) Create Transfer Request

Enter the purpose ‘Employee moving Centres’

6. Accept Requestor defaults
7. Enter purpose ‘Employee moving Centres’
8. (B) Next
9. Tick the checkbox to select the line
10. (B) Next

Transfer the asset from current employee to ‘Gibbard, Greg’

11. Tick the checkbox to select the line
12. Delete the current assigned employee. Use the torch icon to search for your employee, or type the employee name it. Note: Oracle lists all staff as Surname, First Name.
13. (B) Next
14. Review details
15. (B) Submit
Transfer Assets between Locations
Transfer an Asset between Locations

Transfer Asset 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 you 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. The steps are the same as transferring an asset between employees, except you amend the location.

You will also be shown how to add an attachment to a transfer (as a working document) to reference later.
Transfer an Asset between Locations – Asset Search

Responsibility: ECU iAssets Users
iAssets User > iAssets Home
On the iAssets Home Page
(T) Asset Search

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 an Asset between Locations

Transfer an Asset between Locations – Simple Search

1. Enter your search criteria into the appropriate fields, i.e., Asset number, staff name, serial number etc.
2. Click on the (I) Torch at the end of each field if you need to search the values of that field.
3. (B) Go when you have entered all your search criteria.
Transfer an Asset between Locations

Select your Asset

Once your search results are displayed
1. (B) Tick the Select box of the asset you want to transfer
2. (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 an Asset between Locations – Creating Transfer Request

Creating Transfer Request

If you have all the assets you wish to transfer shown on your Assets List
1. (B) Create Transfer Request

If you need to continue to search for more assets to add to the list
1. (B) Search for More Assets

If you want to save the list and work on it later
1. (B) Save for Later

For this exercise we will Create Transfer Request
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:

**Preparer** - This field shows the person who preparing the transfer. This field 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. This field is mandatory.

**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 is read only and always says Upon Approval.

**Purpose** - The reason for creating the transfer request. This field is mandatory.
Transfer an Asset between Locations – Releasing Details

Oracle will ask you to confirm the releasing details of the asset are correct:

1. Tick the Select checkbox
2. (B) Next
Transfer an Asset between Locations – 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.

You will need to specify the new location details that the asset is being transferred to:-
1. Select the line, or lines that you want to transfer
2. Click on the (I) Pencil to update location
Transfer an Asset between Locations – Update Location

Either type or use the (I) Torch to search for the new location for the asset.

1. Once all fields are complete
2. (B) Apply
Transfer an Asset between Locations – Destination Details Updated

You will notice when you return to the Destination Details screen, the location for the asset will have changed to the new location you specified in the previous step.

1. Select the line by clicking in Checkbox
2. (B) Next
Transfer an Asset between Locations - 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.

1. Review the ‘From Location’ and ‘To Location’ fields.
2. (B) ‘Submit’. If the transfer is incorrect click on (B) Back and repeat earlier steps until you are satisfied with the changes, then (B) Submit.
Transfer an Asset between Locations - Confirmation

Transfer an Asset – Confirmation

You will receive a confirmation the request has submitted successfully.

Note: While you have completed the transfer process, there is a further process within FBSC which will effect the transfer. The transfer will not be immediately visible and may not be visible until after the month end processes are complete.
Transfer an Asset between Locations
Practice - Transfer an Asset between Locations

Overview

In this practice you will search for an asset by Asset Number and transfer the asset to a different 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 = trainXX
- Password = trainXX
- Responsibility = ECU iAssets Users

(N) iAssets User : iAssets Home > iAssets Home

- Search for an asset with Asset Number 2000997
- Enter the purpose of transfer as ‘Asset moving to Joondalup Campus’
- Transfer the Asset from the current location to ‘JO.01.282’
- Submit
Solution - Transfer an Asset between Locations

Responsibility: ECU iAssets Users

(N) iAssets User : iAssets Home > iAssets Home > (T) Asset Search

Search for asset number 2000997

1. Enter 2000997 in the Asset Number field
2. (B) Go
3. Tick the checkbox to select the line
4. (B) Add to Assets List
5. (B) Create Transfer Request

Enter the purpose ‘Asset moving to Joondalup Campus’

1. Accept Requestor defaults
2. Enter purpose ‘Asset moving to Joondalup Campus’
3. (B) Next
4. Tick the checkbox to select the line
5. (B) Next

Transfer the asset from current location to ‘JO.01.282’

1. Tick the checkbox to select the line
2. Click on the Pencil icon under the Update Location column on far right of line
3. In the Campus field enter > JO
4. In the Building field enter > 01
5. In the Room field enter > 282
6. (B) Apply
7. When you have applied and returned to the Destination details screen, check the address listed in the new address you entered
8. Tick the checkbox to select the line
9. (B) Next
10. (B) Submit if all details on the Review Request screen are correct. If not, (B) Back to make the changes again.
After this lesson, you should be able to:

- Transfer assets between employees
- Transfer assets between locations
Asset Disposal
After this lesson, you should be able to:

- Dispose of assets using iAssets.
If you need to dispose of an asset, you must contact the Facilities Management Office to request an Asset Disposal Form before any action can be taken. This form must be completed for disposal of all assets.

**Asset Contacts for Facilities Management Office are:**
- Bunbury: Mike Groom
- Churchlands: Andy Smith
- Joondalup: Stewart Cleal
- Mt Lawley: James (Andrew) Spicer

If the asset is over $5k, you must also complete the FBSC Write Off and Disposal form located at the link below. The completed form must be sent to the Senior Finance Officer – Fixed Assets, FBSC.

**Write off and Disposal Form (Form 380)**
This form can be accessed from the following address:
In this exercise you will learn how to dispose of an asset using the iAssets system. This is done by transferring the location of the assets from its current location to ‘DISPOSAL’. The process is similar to that of the previous exercises ‘Transfer an Asset’.

To dispose of an asset:-
1. Logon to Oracle
2. Responsibility: ECU iAssets Users
3. Choose iAssets Home from the iAssets User sub menu
4. (T) Asset Search
5. Enter your search criteria to find the asset you want to dispose of
6. (B) Add to Asset List
7. (B) Create Transfer Request
Asset Disposal – Create Transfer Request

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

**Preparer** - This field shows the person who preparing the transfer. This field 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. This field is mandatory

**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 is read only and always says Upon Approval.

**Purpose** - The reason for creating the transfer request. This field is mandatory.

1. Enter the purpose of the disposal
2. (B) Next
Disposal of Assets – Releasing Details

This is the second step in the disposal transfer process.

Oracle will ask you to confirm the releasing details of the asset are correct:
1. Tick the Select checkbox
2. (B) Next
Asset Disposal – Destination Details

This is the third step of the disposal transfer request process.
You will need to specify new location details to dispose of the asset:
1. Select the line, or lines that you want to transfer
2. Click on the (I) Pencil to update location
Disposal of Assets – Update Location

For disposal of assets, you need to change the location in the building field to DISPOSAL
1. In the Building field, Either type DISPOSAL, or use the (I) Torch to search for the value
2. (B) Apply
Asset Disposal – Destination Details Updated

You will notice when you return to the Destination Details screen, the location for the asset will have changed to read DISPOSAL.

1. Select the line by clicking in Checkbox
2. (B) Next
This is the fourth and final step of the disposal 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.

1. Review the ‘From Location’ and ‘To Location’ fields.
2. (B) ‘Submit’. If the transfer is incorrect click on (B) Back and repeat earlier steps until you are satisfied with the changes, then (B) Submit.
Asset Disposal – Confirmation

You will receive a confirmation that your transfer request was submitted successfully.
Disposal of Assets
Practice - Disposal of an Asset

Overview

In this practice you will search for an asset by Asset Number and transfer the asset to the disposal 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 = trainXX
- Password = trainXX
- Responsibility = ECU iAssets Users

(N) iAssets User : iAssets Home > iAssets Home

- Search for an asset with Asset Number 3001589
- Enter the purpose of transfer as ‘Asset no longer required’
- Transfer the Asset from the current location to ‘DISPOSAL’
- Submit
Solution – Disposal of an Asset

Responsibility: ECU iAssets Users

(N) iAssets User : iAssets Home > iAssets Home > (T) Asset Search

Search for asset number 3001589

1. Enter 3001589 in the Asset Number field.
2. (B) Go.
3. Tick the checkbox to select the line.
4. (B) Add to Assets List.
5. (B) Create Transfer Request.

Enter the disposal purpose

6. Accept Requestor defaults.
7. Enter purpose ‘Asset no longer required’
8. (B) Next.
9. Tick the checkbox to select the line.
10. (B) Next.

Transfer the asset from current location to ‘DISPOSAL’

11. Tick the checkbox to select the line.
12. Click on the Pencil icon under the Update Location column on far right of line.
13. In the Building field enter > DISPOSAL
14. (B) Apply.
15. When you have applied and returned to the Destination details screen, check the address listed contains ‘DISPOSAL’.
16. Tick the checkbox to select the line.
17. (B) Next.
18. (B) Submit if all details on the Review Request screen are correct. If not, (B) Back to make the changes again.
Summary

After this lesson, you should have learnt how to:

- Dispose of Assets
Note: This flowchart shows the pre-requisites for training.