**The Pennsylvania State University**



**SIMBA Hands-On Guide**

**ZAM\_TRANSFERRETIRE\_Asset Transfer and Retirement Form Off Campus**



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# ZAM\_TRANSFERRETIRE\_Asset Transfer and Retirement Form Off Campus

## 

## Overview

**Transaction Description:**

This form and workflow will enable users in business areas and departments to transfer an asset off campus.

**Penn State Purpose:**

This smart form and workflow is for departments and business areas to populate when the need arises to retire, transfer or trade-in an asset.

Use cases include:

* Transferring an asset from one business area to another, e.g., OPP centrally buys equipment for a campus then transfers it to that campus.
* Sending equipment that needs to be disposed of through Lion Surplus, e.g., ARL has obsolete equipment to send to Lion Surplus.
* Reporting equipment that is lost, stolen, or destroyed.
* Returning equipment to a customer or sponsor that has been loaned or relocated.

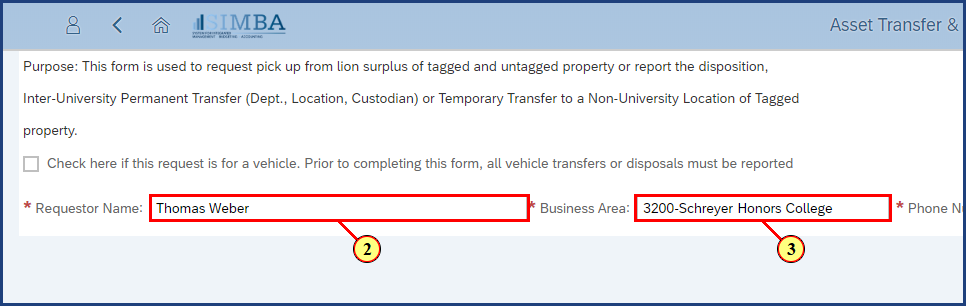
## Process Steps

### Asset Transfer & Retirement Form



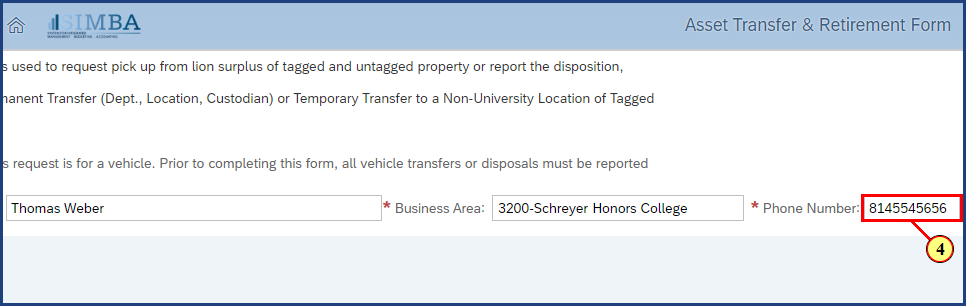
| Step | Action |
| --- | --- |
| 1. | The **Create Request** button is clicked. |

### Asset Transfer & Retirement Form



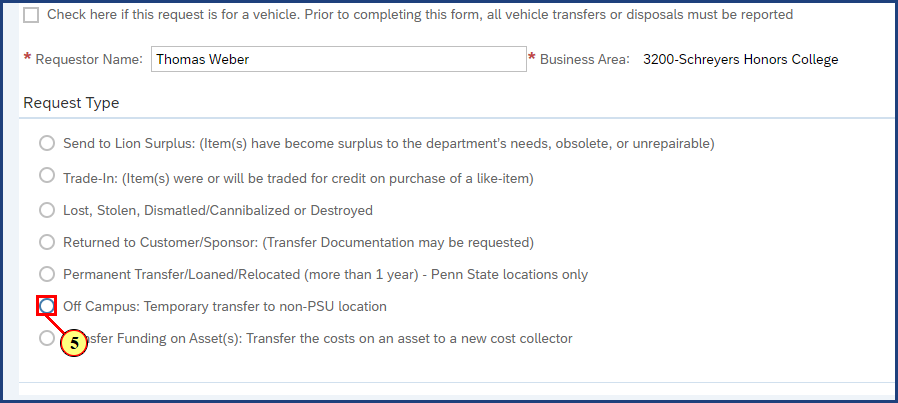
| Step | Action |
| --- | --- |
|  | Enter the Requestor Name, Business Area, and Phone number. |
| 2. | **Thomas Weber** is entered in the **Requestor Name** field. |
| 3. | **3200 - Schreyer Honors College** is entered in the **Business Area**field. |

### Asset Transfer & Retirement Form



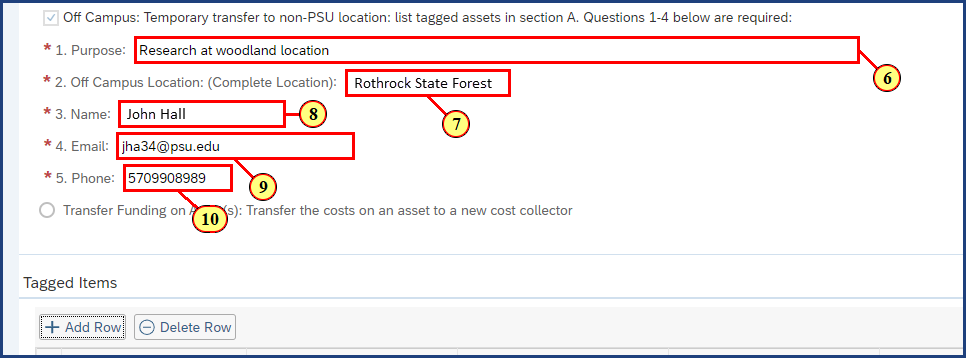
| Step | Action |
| --- | --- |
| 4. | **814-554-5656** is typed into the **Phone Number** field. |

### Asset Transfer & Retirement Form



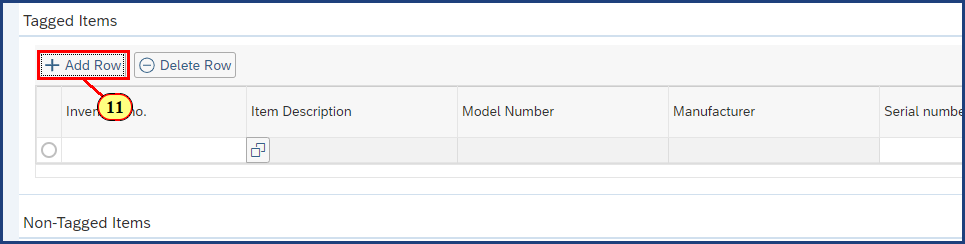
| Step | Action |
| --- | --- |
| 5. | The **Off Campus: Temporary transfer to non-PSU location** radio button is clicked. |

### Asset Transfer & Retirement Form



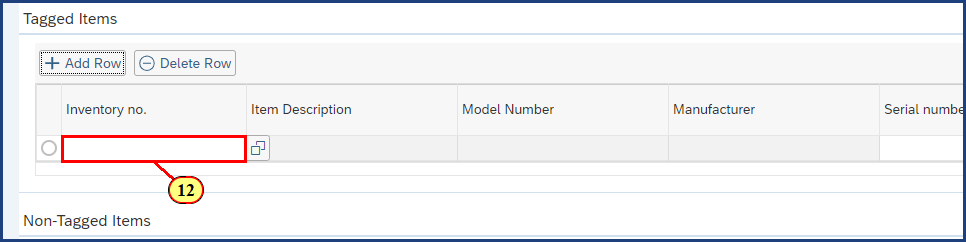
| Step | Action |
| --- | --- |
| 6. | **Research at woodland location** is typed into the **Purpose** field. |
| 7. | **Rothrock State Forest**is typed into the **Off campus location** field. |
| 8. | **John Hall** is typed into the **Name** field. |
| 9. | **jha34@psu.edu**is typed into the **Email** field. |
| 10. | **570-990-8989** is typed into the **Phone** field. |

### Asset Transfer & Retirement Form



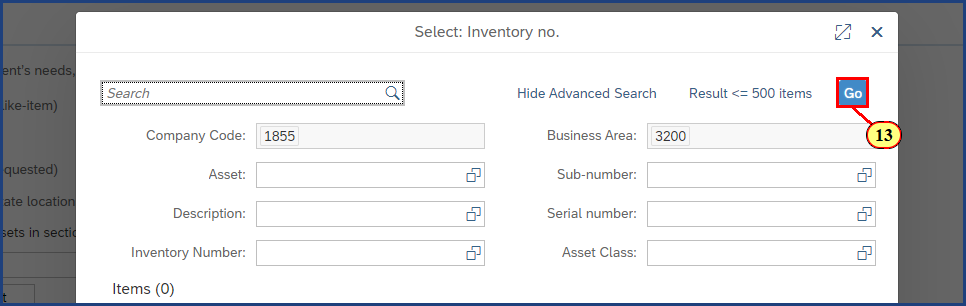
| Step | Action |
| --- | --- |
|  | We need to list the amplifier under Tagged Items and to do so, we must add a row. |
| 11. | The **Add Row** button is clicked. |

### Asset Transfer & Retirement Form



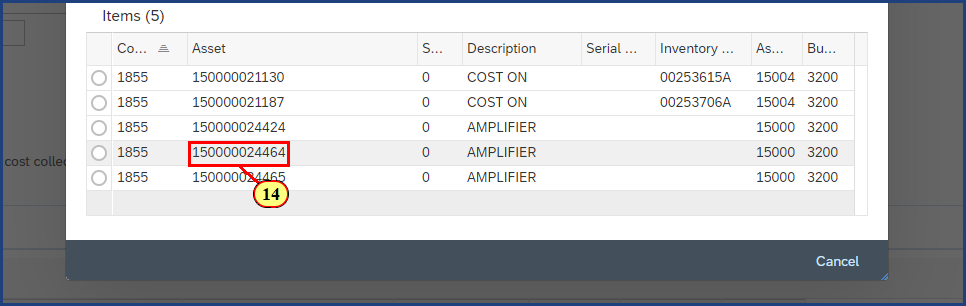
| Step | Action |
| --- | --- |
| 12. | The **Inventory No** field is clicked. |
|  | The **F4** key is pressed. |

### Asset Transfer & Retirement Form



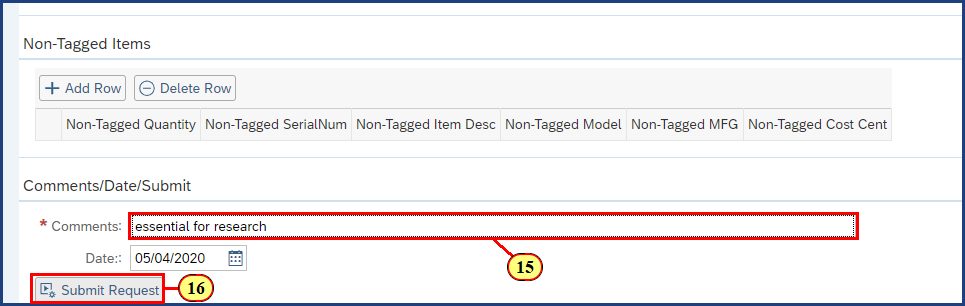
| Step | Action |
| --- | --- |
| 13. | The **Go** button is clicked. |

### Asset Transfer & Retirement Form



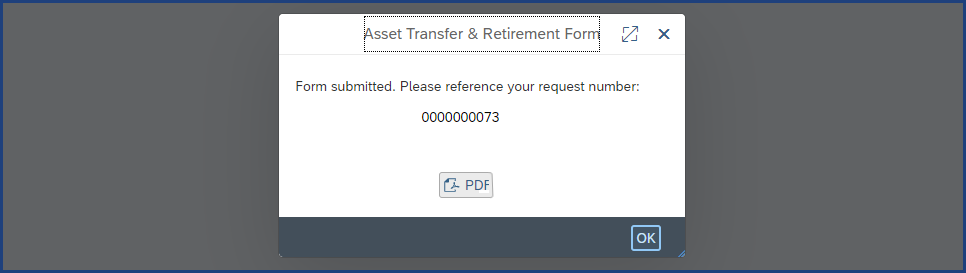
| Step | Action |
| --- | --- |
|  | Select the amplifier asset from the results returned. |
| 14. | The **150000024464 Asset** is clicked. |

### Asset Transfer & Retirement Form



| Step | Action |
| --- | --- |
| 15. | **Essential for research** is typed into the **Comments** field. |
| 16. | The **Submit Request** button is clicked. |

### Asset Transfer & Retirement Form



| Step | Action |
| --- | --- |
|  | The Asset Transfer & Retirement Form confirmation dialog is displayed along with the request reference number, which should be recorded. |

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