



AM210 Managing Assets in GEARS

June 17, 2013

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AM210

AM210 Managing Assets in GEARS

Course Overview

GEARS **Asset Management** is designed to manage and provide the Judiciary a central repository for asset information associated with IT Software assets, such as software packages like PeopleSoft, Windows 7, etc. Non-IT Software assets such as computer hardware, vehicles and other Judiciary equipment, are managed in the Magic system (Magic).

Judicial Information Systems (JIS) is responsible for maintaining IT Software assets and related information in GEARS. Though non-IT Software asset information is entered and maintained in Magic, purchasing data such as the purchase and receipt of these items are captured in the GEARS Purchasing (Purchasing) application. JIS is also responsible for retrieving this information after it is recorded in Purchasing for the purposes of entry and/or updates in Magic.

This course discusses the procedures used to create and maintain IT Software assets and related information in Asset Management. It also discusses how to extract non-IT Software asset information that is to be managed in Magic.

Course Outline

The following course sections and lessons provide information and procedures on creating and managing IT Software assets in GEARS and retrieving non-IT software asset information to be entered and managed in Magic.

- Course Audiences and Prerequisites
- Lesson 1: Understanding Asset Management in GEARS
- Lesson 2: Creating an IT Software Asset Online
- Lesson 3: Creating Assets via the Transaction Loader Process
- Lesson 4: Running the Magic Report
- Lesson 5: Managing Assets
- Lesson 6: Reviewing Asset Information
- Course Summary

Course Audiences and Prerequisites

Audience(s):

The Judiciary audiences for this course are:

- AOC - Judicial Information Systems (JIS)

GEARS Role(s):

This course is intended for Judiciary employees with the following GEARS role(s):

- AM Fixed Assets

Prerequisites:

The recommended prerequisites for this course are:

- INT100 Introduction to GEARS
- AM100 Understanding GEARS Asset Management

Lesson 1: Understanding Asset Management in GEARS

Lesson Overview

GEARS Asset Management tracks activity related to IT Software assets. Specifically, Asset Management tracks the licensing period (i.e., the expiration date) for software owned by the Judiciary. Information related to the purchase of these assets and vendor payment is also available and can be monitored, as needed.

Lesson Objectives

After completing this lesson, you should be familiar with:

- How Asset Management integrates with other GEARS applications
- Asset Management business processes
- The pages used to add, update, and review asset information

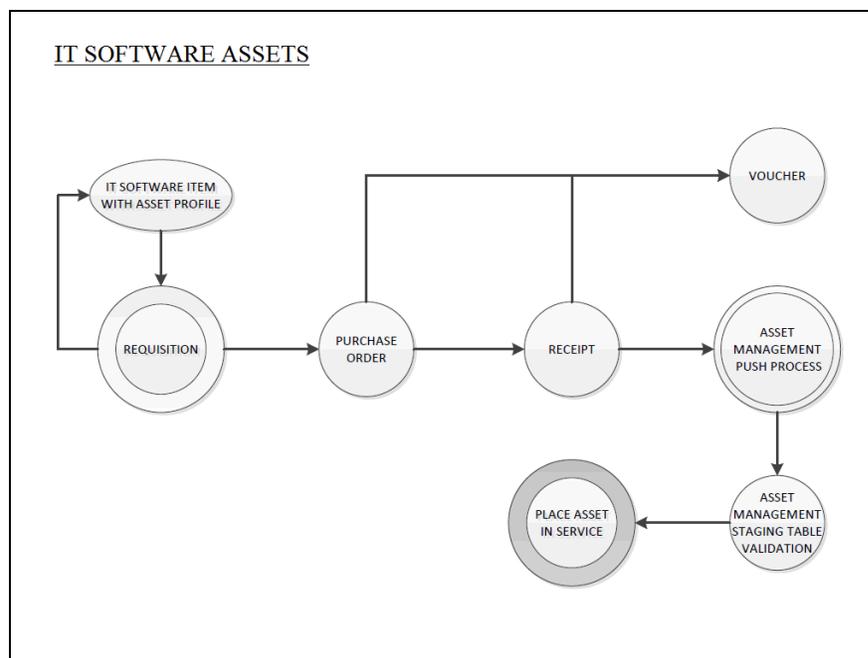
1.1 Understanding AM Integration with other GEARS Applications

After completing this topic, you will be familiar with:

- The GEARS modules that integrate with Asset Management
- The asset information received by Asset Management from other GEARS modules

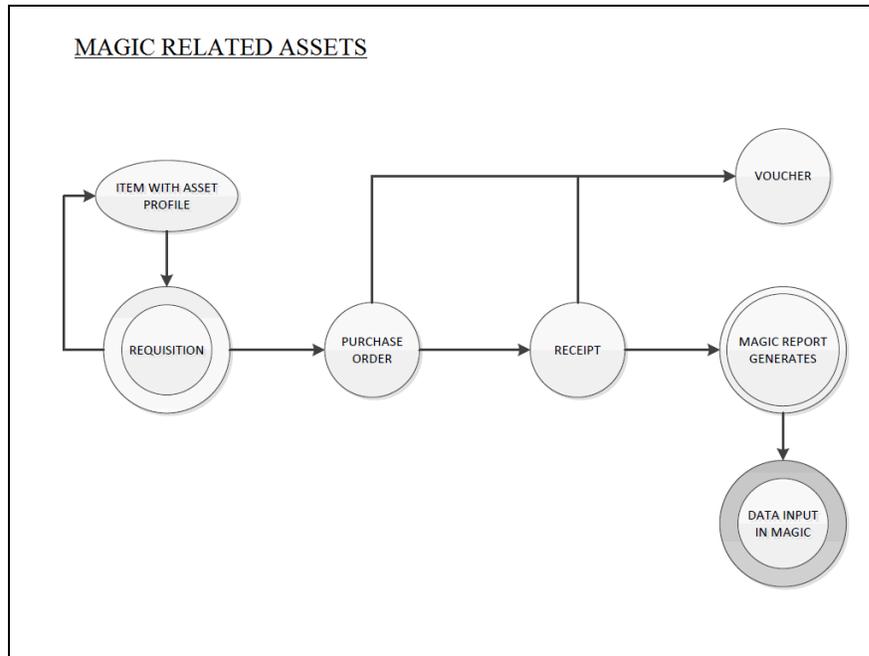
Procedure

In this topic, you will review how the Purchasing module integrates with Asset Management.

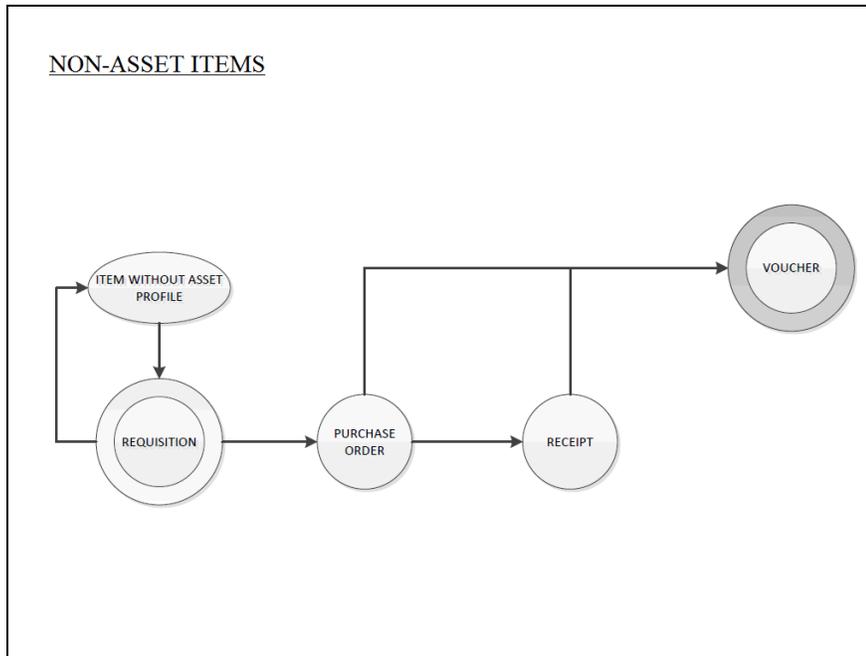


Step	Action
1.	Asset Management integrates with Purchasing to facilitate the creation of assets as they are received. This diagram illustrates the process flow for IT Software Assets .

Step	Action
2.	<p>The foundation of Purchasing to Asset Management integration is the setup of the Item used on a requisition and purchase order.</p> <p>In the diagram, the item has an Asset Profile, which serves as an indicator to trigger AM integration.</p>
3.	<p>The Item is first entered on a requisition, which is then used to create a purchase order. When the items are received, saving the receipt triggers the Asset Management Push Process to send the data to the AM module</p> <p>NOTE: An option on the receipt (i.e., the Interface Receipt checkbox) should be selected in order to push asset data to the AM module. The receiver should check this checkbox when receiving all IT Software related assets. This checkbox should be left unchecked for Magic related items so they are not interfaced to AM.</p>
4.	<p>Before an asset is created in earnest, the data will reside in a staging table (the Pre-AM Interface Table) awaiting verification. This is a safeguard to ensure assets are properly created. One of the controls that will be enforced at this stage is ensuring the inclusion of all IT Software assets, and the exclusion of Magic related assets.</p> <p>Additionally, asset attributes such as acquisition cost, date, description, and vendor that are brought over from the purchase order and receipt are data elements in need of verification at this stage.</p>
5.	<p>Once assets are verified in the staging table, the Transaction Loader process is run to create the asset and assign an Asset ID. The assets will then be placed in the "In Service".</p> <p>JIS personnel can enter or update asset information manually directly in Asset Management when needed.</p>



Step	Action
6.	<p>This diagram represents the data flow for assets that will be tracked in Magic. The generation of the Magic Report rests upon Purchasing to AM integration.</p> <p>Magic related assets include items such as automobiles, buildings, computers, furniture, land, machinery, and equipment. These items will have an Asset Profile assigned to them so they show up in the Magic Report, which is generated based on received items.</p> <p>The Receiver should not check the Interface Receipt checkbox on the Receipt for Magic related items, only for IT Software items.</p> <p>The Magic Report is the basis for data entry in Magic.</p>



Step	Action
7.	<p>To illustrate the importance of item setup, specifically the "Item to Asset Profile" relationship, the diagram shows the data flow process for items that do not have an Asset Profile.</p> <p>The item is used on a requisition, which is sourced to a purchase order. The item is received, but since there isn't an Asset Profile on the item, the item will not interface to Asset Management even if the Interface Receipt checkbox is checked. Only items that have an Asset Profile that are also received with the Interface Receipt checkbox checked will be interfaced to AM - both criteria must be met.</p>
8.	<p>You have successfully completed the Understanding AM Integration with other GEARS Processes topic.</p> <p>You have reviewed the following processes: - How GEARS Purchasing integrates with Asset Management End of Procedure.</p>

Lesson 2: Creating Assets through Purchasing to AM Integration

Lesson Overview

Asset Management integrates with the Purchasing module to receive asset information and create an asset profile. In this lesson, you will learn how this integration process works to create assets for IT Software.

Lesson Objectives

After completing this lesson you will be able to:

- Create a receipt for an asset
- View asset information that has been loaded to the Pre-AM interface staging table
- Load asset information from the Pre-AM staging table to Asset Management

2.1 Creating a Receipt for an Asset

When assets are received, you must enter the related receiving information into the Purchasing module within the **Receiving** component. IT Software asset information is managed within GEARS, and therefore needs to be recorded in the Asset Management module. The Asset Management Push Process allows asset data entered on the receipt to be loaded into the Pre-AM staging table so that it can be reviewed prior to the creation of the IT software asset in Asset Management.

There is no interface between GEARS and Magic. When the Interface Receipt box is checked, a notification is sent to Magic indicating that the item is ready to be manually added to the Magic system.

The **Interface Receipt** checkbox on the receipt must be selected for all IT Software assets. This option indicates that asset data on the receipt should be loaded to the staging table. This checkbox should be left unchecked for Magic related items so they are not interfaced to AM.

This topic outlines the steps needed to create a Purchasing Receipt for both IT and non-IT Software asset categories and how to send asset information for IT software assets to Asset Management.

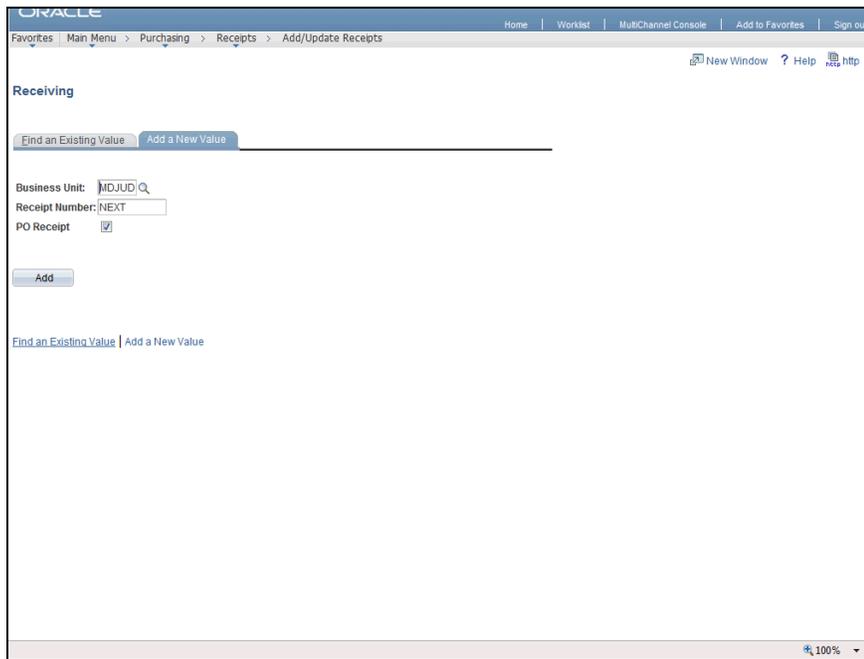
After completing this topic, you will be able to:

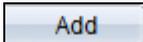
- Create a receipt for an asset

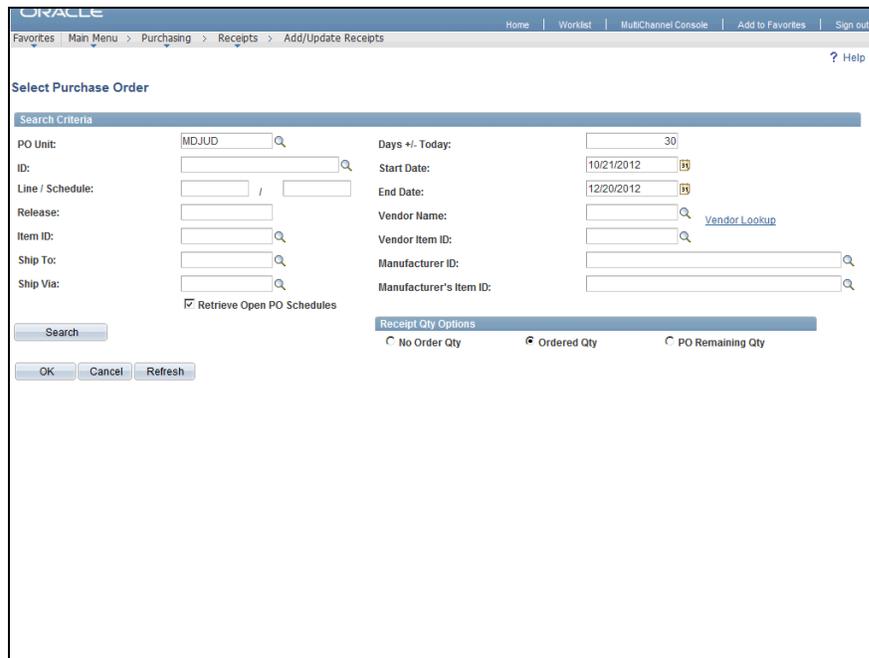
Procedure

In this topic, you will learn how to create a receipt for an IT Software asset.

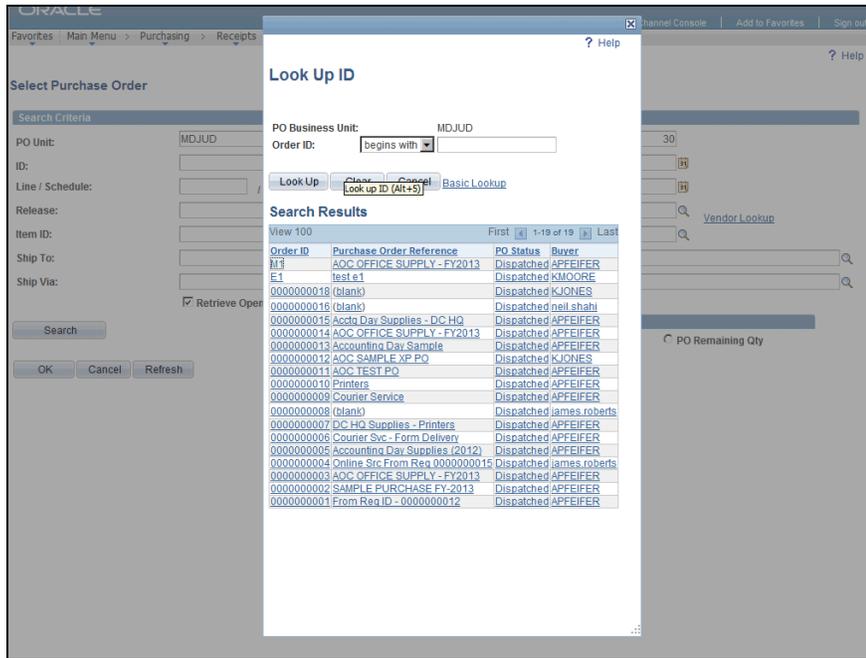
Step	Action
1.	Begin by navigating to the Select Purchase Order page. Click the Main Menu button. 
2.	Click the Purchasing menu. 
3.	Click the Receipts menu. 
4.	Click the Add/Update Receipts menu. 

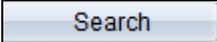
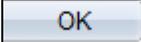


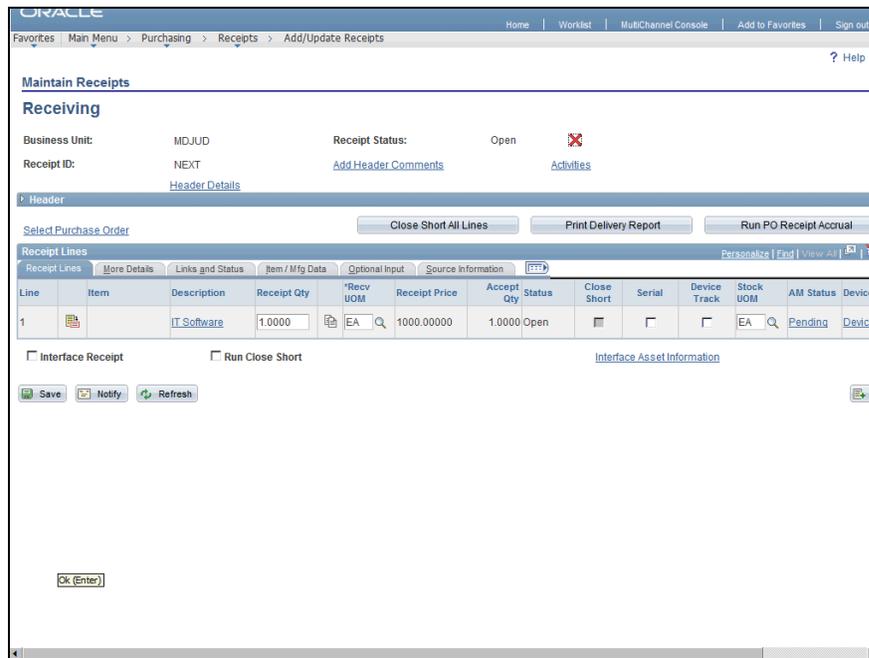
Step	Action
5.	The Receiving - Add a New Value page displays. Use this page to create a new receipt number. Make sure the PO Receipt checkbox is checked.
6.	Click the Add button. 



Step	Action
7.	<p>The Select Purchase Order page displays.</p> <p>Use this page to enter criteria and search for the purchase order. You can provide as much or as little selection criteria as you want. Supplying more search criteria will reduce the number of rows returned by the search.</p>
8.	<p>Click the ID Look Up button.</p> 

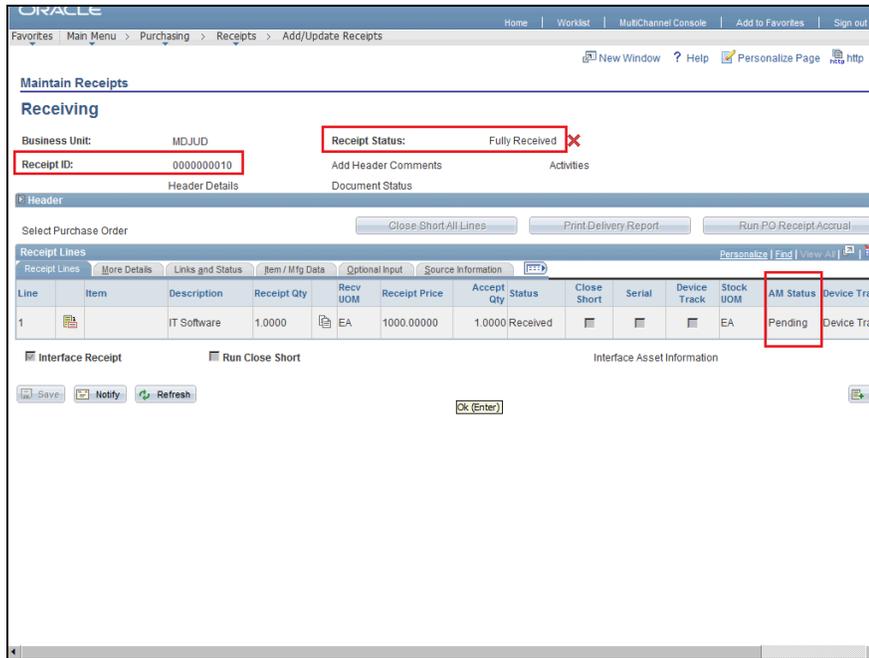


Step	Action
9.	The Look Up ID window displays. Use this page to search or select the specific Order ID .
10.	Click the Order ID field and enter the desired information.
11.	Click the Search button. 
12.	Click the Sel option checkbox for the PO ID line(s) you wish to receive against. <input checked="" type="checkbox"/>
13.	Click the OK button. 



The screenshot shows the Oracle 'Maintain Receipts - Receiving' page. At the top, there are navigation tabs: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. Below that, the breadcrumb trail is: Favorites > Main Menu > Purchasing > Receipts > Add/Update Receipts. The main heading is 'Maintain Receipts' with a sub-heading 'Receiving'. The receipt details are: Business Unit: MDJUD, Receipt ID: NEXT, Receipt Status: Open. There are links for 'Add Header Comments' and 'Activities'. A 'Header' section contains buttons for 'Close Short All Lines', 'Print Delivery Report', and 'Run PO Receipt Accrual'. Below that is a 'Select Purchase Order' section. The 'Receipt Lines' section has tabs for 'Receipt Lines', 'More Details', 'Links and Status', 'Item / Mfg Data', 'Optional Input', and 'Source Information'. A table with columns: Line, Item, Description, Receipt Qty, *Recv UOM, Receipt Price, Accept Qty, Status, Close Short, Serial, Device Track, Stock UOM, AM Status, Device. The first row shows: 1, IT Software, 1.0000, EA, 1000.00000, 1.0000, Open. Below the table are checkboxes for 'Interface Receipt' and 'Run Close Short', and a link for 'Interface Asset Information'. At the bottom, there are buttons for 'Save', 'Notify', 'Refresh', and 'OK (Enter)'.

Step	Action
14.	The Maintain Receipts - Receiving page displays. Use this page to enter receipt information.
15.	Click the Interface Receipt option if not already selected. NOTE: This option should only be selected when receiving an IT Software related asset. This checkbox should be left unchecked for Magic related items so they are not interfaced to Asset Management. <input type="checkbox"/> Interface Receipt
16.	Click the Save button. <input type="button" value="Save"/>
17.	A message displays to confirm that the receipt was saved and the push process has been initiated to send the receipt information to the Pre-AM staging table. Click the OK button. <input type="button" value="OK"/>



Step	Action
18.	Note that the Receipt Status displays "Fully Received" and the AM Status is "Pending". A Receipt ID has been assigned.
19.	The Receipt Status and the AM Status will change to "Moved to Destination" once the receipt data has been transmitted to the Pre-AM staging table.
20.	You have successfully completed the <i>Create Receipt for an Asset</i> topic. You have learned to: - Create a receipt for an asset End of Procedure.

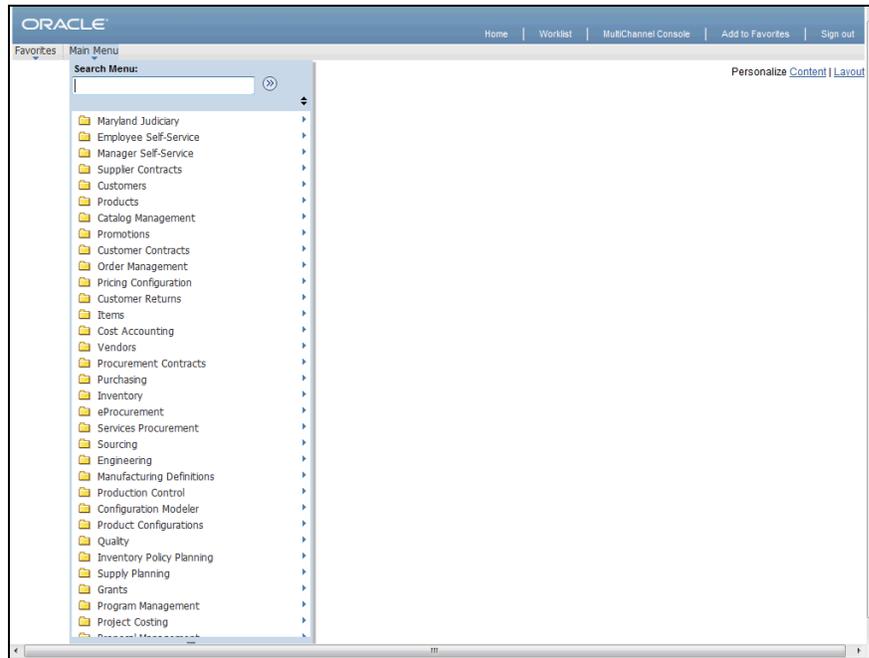
2.2 Viewing Data in the Pre-Am Staging Table

After completing this topic, you will be able to:

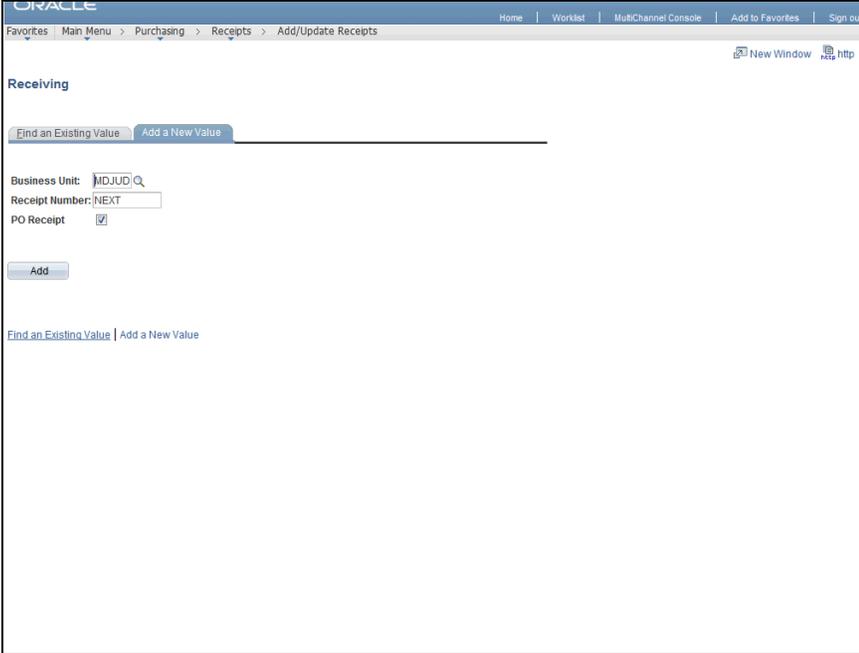
- Review asset information loaded to the Pre-AM Interface staging table

Procedure

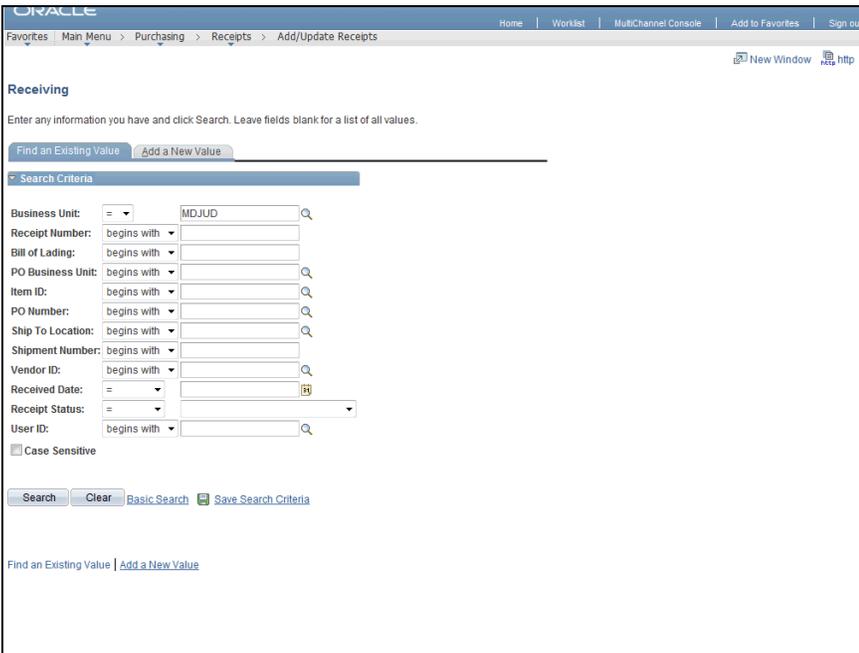
In this topic, you will review a receipt that was created for an IT software asset and has been moved to the Pre-AM interface staging table. You will also review the asset information transferred from the receipt in the Pre-AM interface staging table.

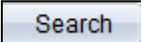


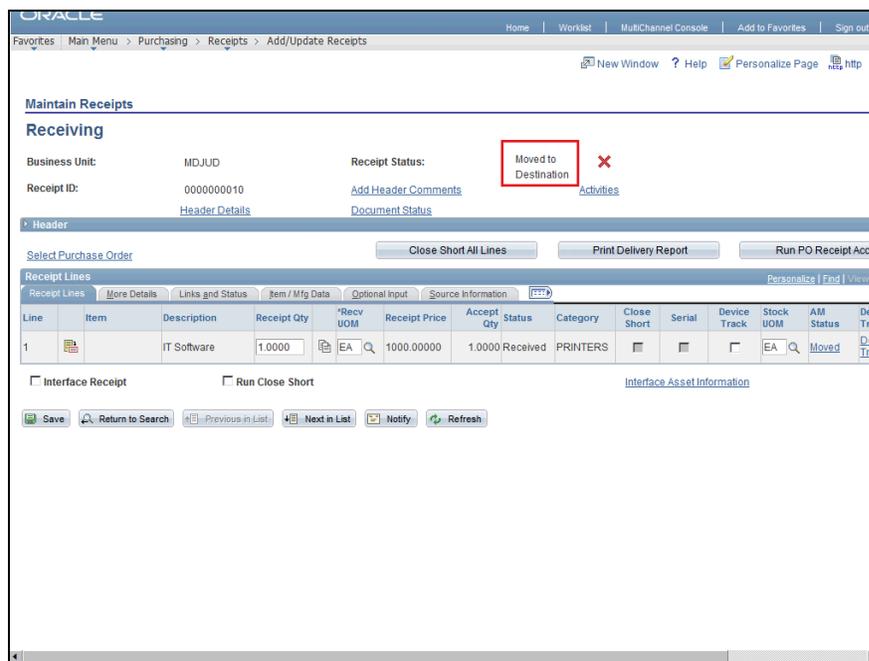
Step	Action
1.	Begin by navigating to the Receiving search page. Click the Purchasing menu. 
2.	Click the Receipts menu. 
3.	Click the Add/Update Receipts menu. 



Step	Action
4.	<p>The Receiving - Add a New Value page displays.</p> <p>Click the Find an Existing Value tab.</p> 

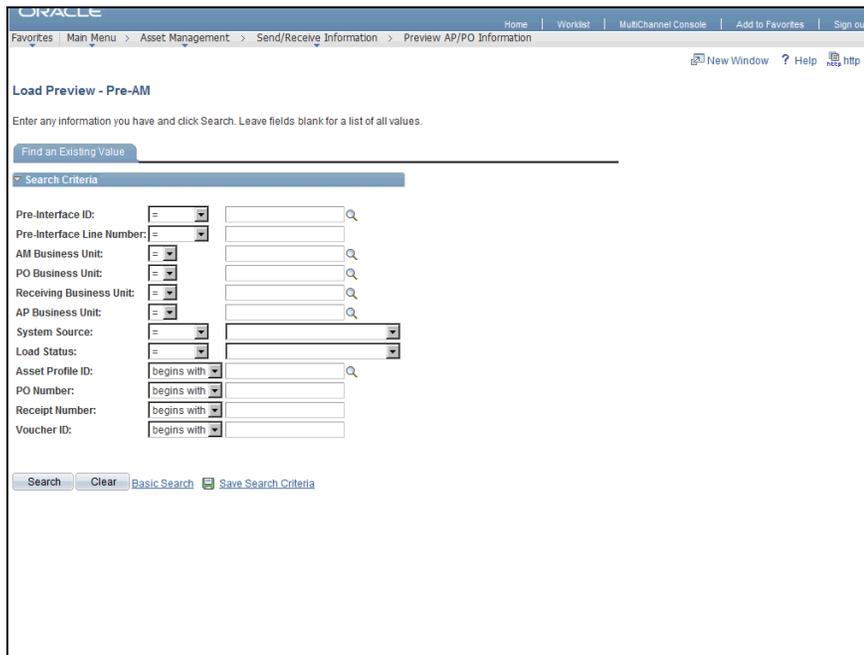


Step	Action
5.	The Receiving search page displays. Enter search criteria to find the IT software asset receipt. Enter the receipt number into the Receipt Number field, if known.
6.	HINT: If you don't know the receipt number, you can narrow your search results using the Receipt Status search field. Select "Moved" to search for receipts that are ready to be sent to Asset Management.
7.	Click the Search button. 

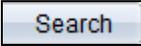


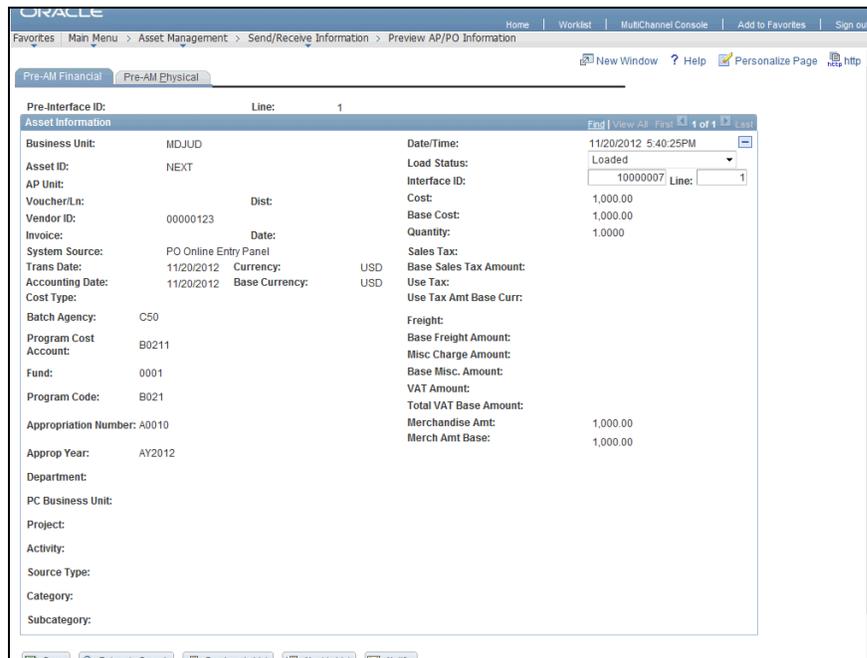
Step	Action
8.	The Maintain Receipts - Receiving page displays. Verify that the Receipt Status is "Moved to Destination".
9.	Verify that the AM Status on each receipt line is "Moved".

Step	Action
10.	<p>These statuses indicate that receipt information is moved to the Pre-AM staging table.</p> <p>NOTE: Receipt information is moved to the Pre-AM staging tables when the Interface Receipt checkbox is selected during receipt entry and the receipt is saved. The receiving process for assets is covered in detail in the <i>PO240 Receiving in GEARS</i> course.</p>
11.	<p>Navigate to the Load Preview - Pre-AM to view the information that was sent to the staging table.</p> <p>Click the Interface Asset Information link in the bottom right corner of the Receiving page.</p> <p>Interface Asset Information</p>

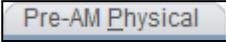


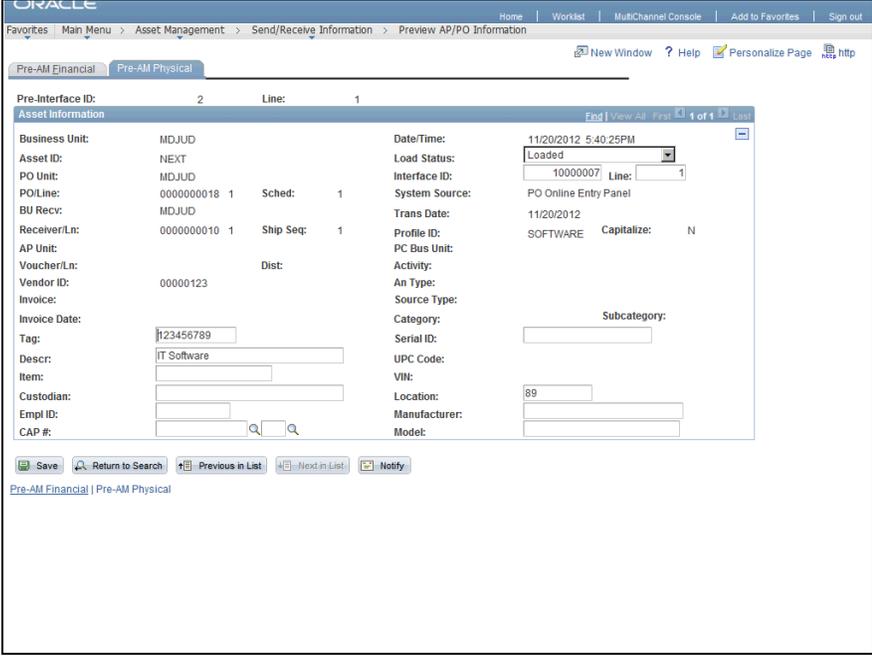
Step	Action
12.	<p>The Load Preview - Pre-AM search page displays.</p> <p>NOTE: You can also navigate directly to the Load Preview - Pre-AM search page using the following menu navigation: <i>Asset Management > Send/Receive Information > Preview PO/AP Information</i></p>
13.	<p>Enter search criteria to narrow your search results. You can enter asset profile ID, system source or specify the purchase order or receipt to narrow the results retrieved.</p>

Step	Action
14.	Click the Search button. 
15.	Data rows loaded in the Pre-AM staging table display that match the criteria entered. Click the row containing the receipt that was loaded. 



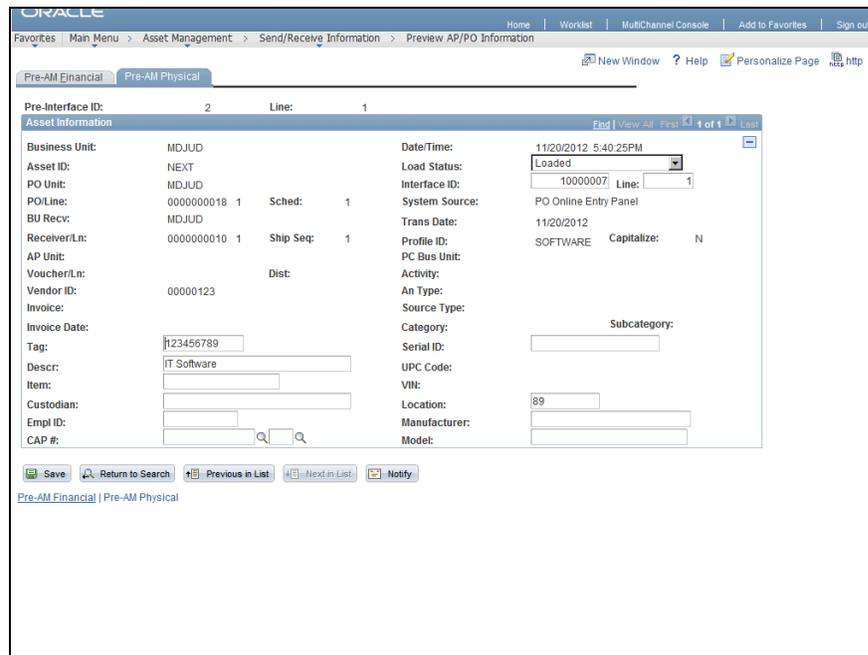
Step	Action
16.	The Pre-AM Financial page displays. The Pre-AM Financial page displays the acquisition information from the source transaction - in this case, the purchase order. Review the acquisition including the vendor, total amount of transaction, and Chartfields recorded for the transaction.
17.	The Asset ID field displays "NEXT" indicating that once the asset is created the system generates the next sequential Asset ID.
18.	If loading Purchasing receipt data in batch, there may be several rows of data for each receipt loaded to the staging table for the Pre-Interface ID. Use the View All link or the navigation arrow buttons in the top right corner of the Asset Information section to view the rows on the Pre-AM Financial page. This is true for the Pre-AM Physical page as well.

Step	Action
19.	Click the Pre-AM Physical tab. 



The screenshot displays the Oracle Pre-AM Physical interface. At the top, there are navigation tabs for 'Pre-AM Financial' and 'Pre-AM Physical', with 'Pre-AM Physical' being the active tab. Below the tabs, the page shows 'Pre-Interface ID: 2' and 'Line: 1'. The main area is titled 'Asset Information' and contains a grid of fields for asset details. Key fields include Business Unit (MDJUD), Asset ID (NEXT), Load Status (Loaded), PO Unit (MDJUD), PO Line (000000018), BIU Recv (MDJUD), Receiver Ln (000000010), AP Unit, Voucher Ln, Vendor ID (00000123), Invoice Date, Tag (123456789), Descr (IT Software), Item, Custodian, Empl ID, CAP #, Date Time (11/20/2012 5:40:25PM), Load Status (Loaded), Interface ID (10000007), System Source (PO Online Entry Panel), Trans Date (11/20/2012), Profile ID (SOFTWARE), PC Bus Unit, Activity, An Type, Source Type, Category, Subcategory, Serial ID, UPC Code, VIN (89), Location, Manufacturer, and Model. At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

Step	Action
20.	The Pre-AM Physical page displays. The information provided on the Pre-AM Physical page is the physical data elements of the asset that will be created. The source transactions (e.g., the purchase order and receipt) are provided.
21.	Notice the Load Status displays "Loaded". This indicates that the receipt data is loaded to the Pre-AM staging table and is ready to be loaded to Asset Management.



Oracle Asset Management - Pre-AM Physical

Pre-Interface ID: 2 Line: 1

Asset Information

Business Unit: MDJUD Date/Time: 11/20/2012 5:40:25PM

Asset ID: NEXT Load Status: Loaded

PO Unit: MDJUD Interface ID: 10000007 Line: 1

PO/Line: 000000018 1 Sched: 1 System Source: PO Online Entry Panel

BU Recv: MDJUD Trans Date: 11/20/2012

Receiver/Line: 000000010 1 Ship Seq: 1 Profile ID: SOFTWARE Capitalize: N

AP Unit: PC Bus Unit:

Voucher/Line: Dist: Activity:

Vendor ID: 00000123 An Type:

Invoice: Source Type:

Invoice Date: Category: Subcategory:

Tag: 123456789 Serial ID:

Descr: IT Software UPC Code:

Item: VIN:

Custodian: Location: 89

Empl ID: Manufacturer:

CAP #: Model:

Buttons: Save, Return to Search, Previous in List, Next in List, Notify

Step	Action
22.	Verify that data such as the Tag Number and Profile ID are correct. Also make sure that the Capitalize fields displays "N" (the asset is a non-capitalized asset).
23.	You have successfully completed the <i>Viewing Data in the Pre-Am Staging Table</i> topic. You have learned how to: - Review asset information loaded to the Pre-AM Interface staging table End of Procedure.

2.3 Loading an Asset and Place in Service

When a PO receipt for an asset has been created and saved, the receipt data is moved to the Pre-AM staging table by the Asset Management **Push Process**. **NOTE:** The PO receipt must have the **Interface Receipt** check box selected in order to load the receipt data to the staging tables.

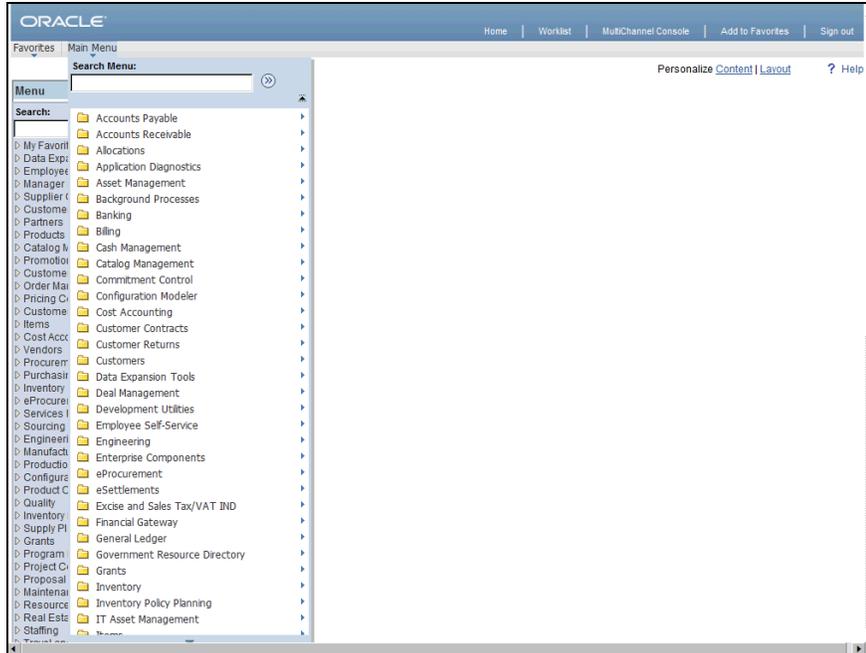
Run the **Transaction Loader** process to load the staged data into Asset Management to create an asset. The asset should have a status of "In Service" after the process creates the asset.

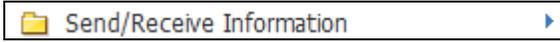
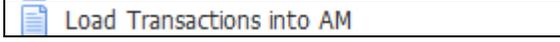
After completing this topic, you will be able to:

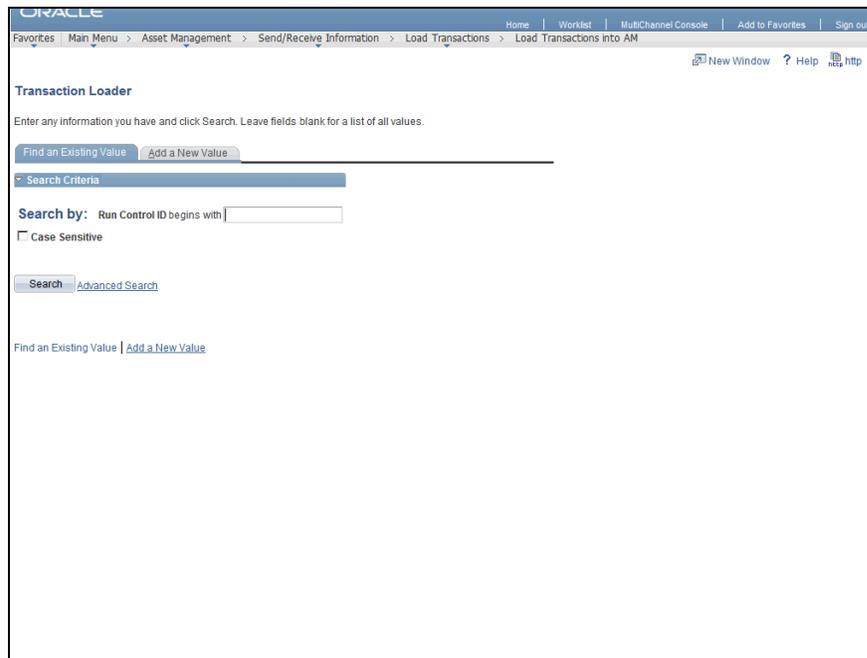
- Run the Transaction Loader process and find the asset
- Verify that the status of the asset is "In Service"

Procedure

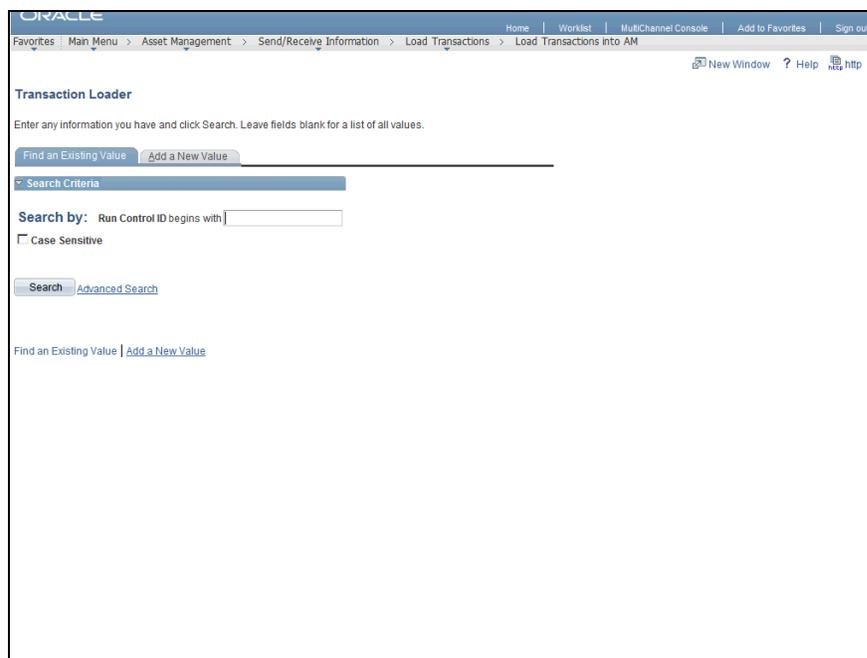
In this topic, you will run the Transaction Loader process in order to load the staged data into Asset Management. This process will create a profile for the IT software asset and assign it an asset ID. You will then confirm the asset was created and place it 'In Service'.



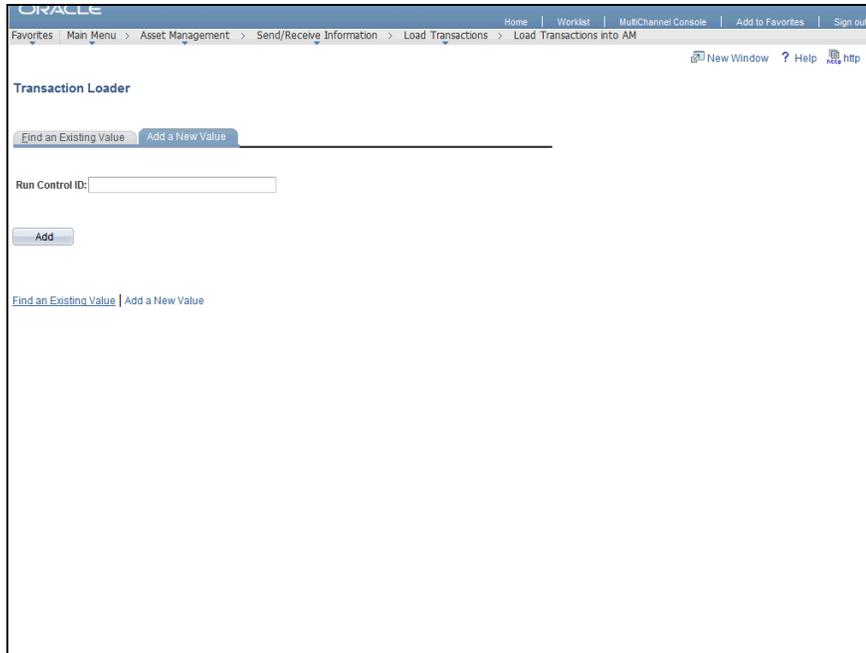
Step	Action
1.	<p>Begin by navigating to the Transaction Loader page.</p> <p>Click the Asset Management menu.</p> 
2.	<p>Click the Send/Receive Information menu.</p> 
3.	<p>Click the Load Transactions menu.</p> 
4.	<p>Click the Load Transactions into AM menu.</p> 

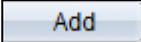


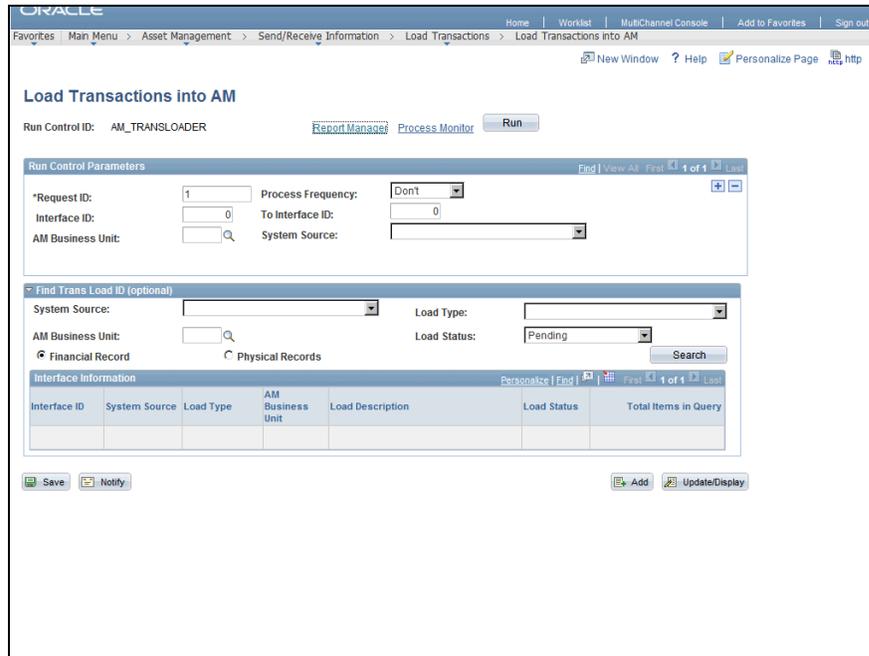
Step	Action
5.	<p>The Transaction Loader search page displays.</p> <p>You can run the Transaction Loader process by searching for an existing run control, or if you have not already created a run control, you can add a new run control.</p>



Step	Action
6.	Add a new run control. Click the Add a New Value tab. 

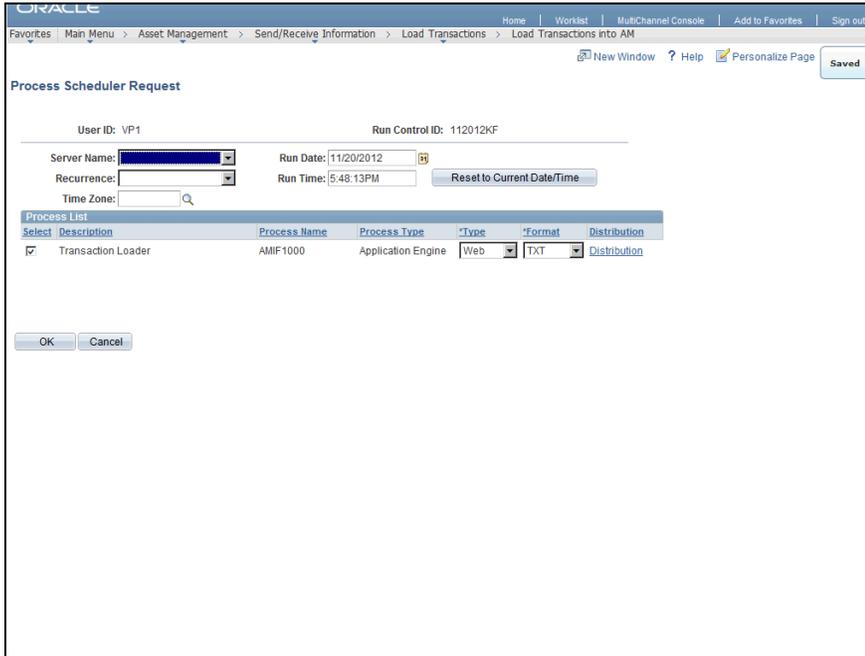


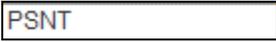
Step	Action
7.	The Transaction Loader - Add a New Value tab displays. Enter a run control ID into the Run Control ID field, e.g. "AM_TRANSLOADER." NOTE: You cannot use spaces in your description.
8.	Click the Add button. 

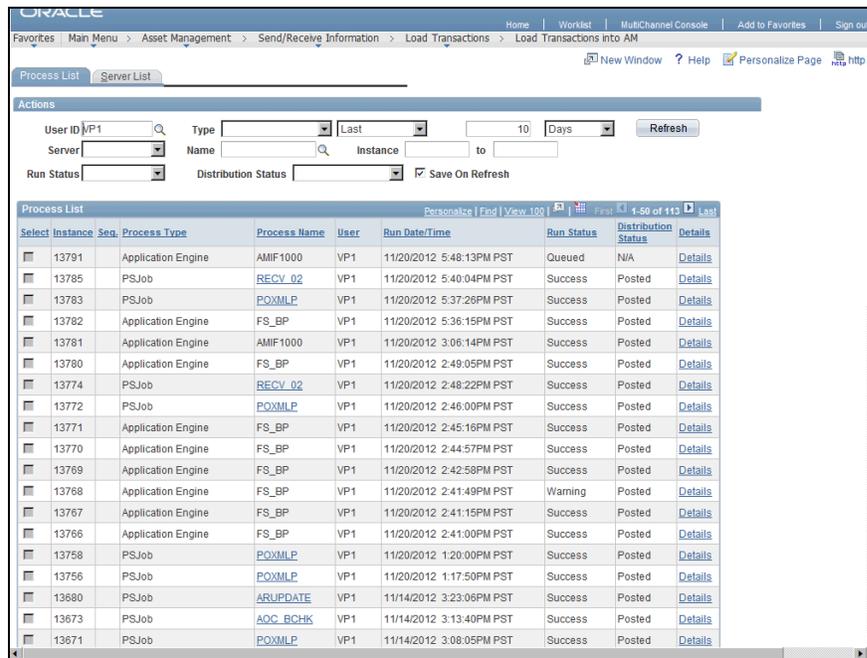


Step	Action
9.	The Load Transactions into AM page displays. Use the Load Transactions into AM page to enter the request parameters. These parameters will be used to define the processing rules and data to be included when the process runs.
10.	In the Run Control Parameters section, identify the assets that you want to load to Asset Management . Enter the interface ID into the Interface ID field.
11.	Enter the interface ID into the To Interface ID field.
12.	Enter " MDJUD " into the AM Business Unit field.
13.	Click the Process Frequency list. 
14.	Click the Once list item. 
15.	If you want to load multiple transactions as a batch, you can do so using the System Source field.
16.	Click the System Source list. 
17.	You will be given a list of batch delivery options. If applicable, select the appropriate list item.

Step	Action
18.	Click the Run button. 

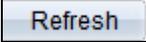


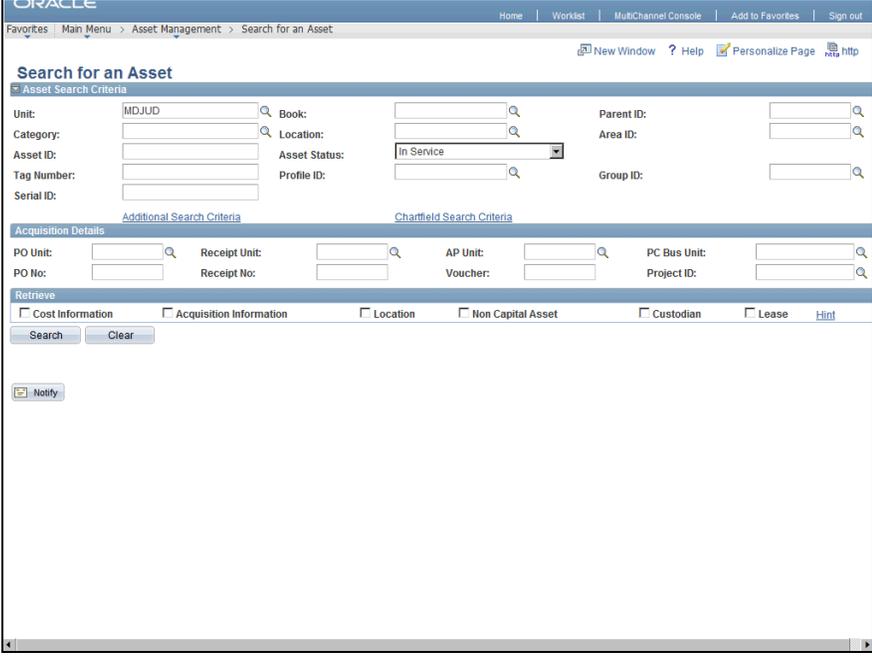
Step	Action
19.	The Process Schedule Request page displays. Use the Process Scheduler Request page to enter or update parameters, such as server name and process output format.
20.	Click the Server Name list. 
21.	Click the PSNT list item. 
22.	Click the OK button. 
23.	Click the Process Monitor link. 

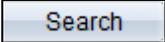
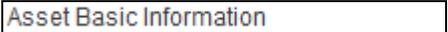
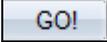


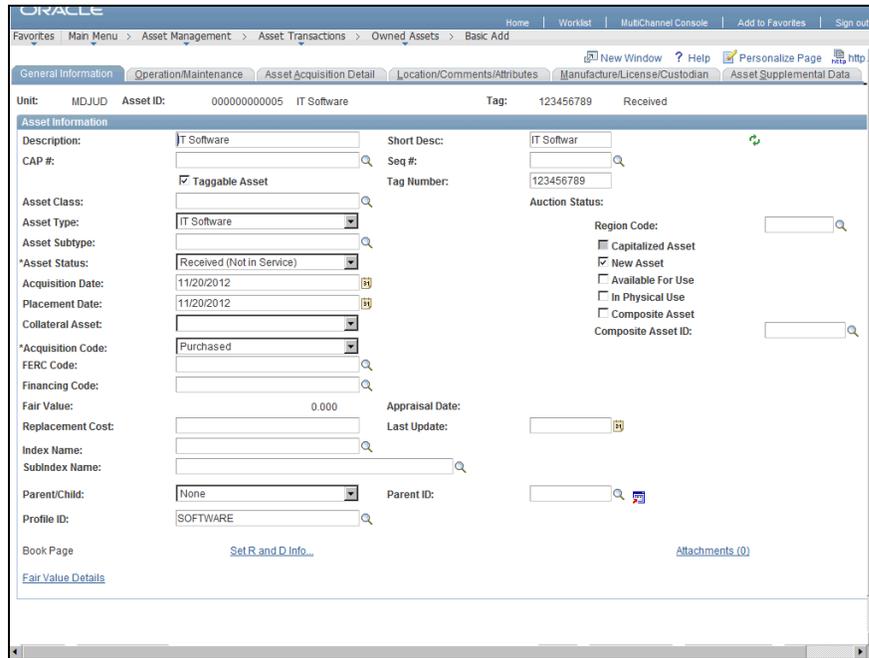
The screenshot shows the Oracle GEARS 'Process List' page. At the top, there are navigation tabs for 'Process List' and 'Server List'. Below this is an 'Actions' section with search filters for 'User ID' (set to 'VP1'), 'Type', 'Last' (set to '10 Days'), 'Server', 'Name', 'Instance', 'Run Status', and 'Distribution Status'. A 'Refresh' button is visible. The main area contains a table with the following data:

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	13791		Application Engine	AMIF1000	VP1	11/20/2012 5:48:13PM PST	Queued	N/A	Details
<input type="checkbox"/>	13785		PSJob	RECV_02	VP1	11/20/2012 5:40:04PM PST	Success	Posted	Details
<input type="checkbox"/>	13783		PSJob	POXMLP	VP1	11/20/2012 5:37:26PM PST	Success	Posted	Details
<input type="checkbox"/>	13782		Application Engine	FS_BP	VP1	11/20/2012 5:36:15PM PST	Success	Posted	Details
<input type="checkbox"/>	13781		Application Engine	AMIF1000	VP1	11/20/2012 3:06:14PM PST	Success	Posted	Details
<input type="checkbox"/>	13780		Application Engine	FS_BP	VP1	11/20/2012 2:49:05PM PST	Success	Posted	Details
<input type="checkbox"/>	13774		PSJob	RECV_02	VP1	11/20/2012 2:48:22PM PST	Success	Posted	Details
<input type="checkbox"/>	13772		PSJob	POXMLP	VP1	11/20/2012 2:46:00PM PST	Success	Posted	Details
<input type="checkbox"/>	13771		Application Engine	FS_BP	VP1	11/20/2012 2:45:16PM PST	Success	Posted	Details
<input type="checkbox"/>	13770		Application Engine	FS_BP	VP1	11/20/2012 2:44:57PM PST	Success	Posted	Details
<input type="checkbox"/>	13769		Application Engine	FS_BP	VP1	11/20/2012 2:42:58PM PST	Success	Posted	Details
<input type="checkbox"/>	13768		Application Engine	FS_BP	VP1	11/20/2012 2:41:49PM PST	Warning	Posted	Details
<input type="checkbox"/>	13767		Application Engine	FS_BP	VP1	11/20/2012 2:41:15PM PST	Success	Posted	Details
<input type="checkbox"/>	13766		Application Engine	FS_BP	VP1	11/20/2012 2:41:00PM PST	Success	Posted	Details
<input type="checkbox"/>	13758		PSJob	POXMLP	VP1	11/20/2012 1:20:00PM PST	Success	Posted	Details
<input type="checkbox"/>	13756		PSJob	POXMLP	VP1	11/20/2012 1:17:50PM PST	Success	Posted	Details
<input type="checkbox"/>	13680		PSJob	ARUPDATE	VP1	11/14/2012 3:23:06PM PST	Success	Posted	Details
<input type="checkbox"/>	13673		PSJob	AOC_BCHK	VP1	11/14/2012 3:13:40PM PST	Success	Posted	Details
<input type="checkbox"/>	13671		PSJob	POXMLP	VP1	11/14/2012 3:08:05PM PST	Success	Posted	Details

Step	Action
24.	Click the Refresh button until the Run Status is Success and the Distribution Status is Posted . 
25.	Once the Run Status reads Success and the Distribution Status is Posted, click the Asset Management menu. 
26.	Click the Search for an Asset menu. 



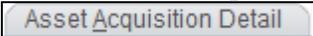
Step	Action
27.	The Search for an Asset page displays.
28.	Click the Asset Status list. 
29.	Click the Received (Not in Service) list item. 
30.	Click the Search button. 
31.	Click the option for the asset created by the Load process - it is identifiable in this list by Description and Tag Number. 
32.	Click the Drill-Down To menu. 
33.	Click the Asset Basic Information list item. 
34.	Click the GO! button. 

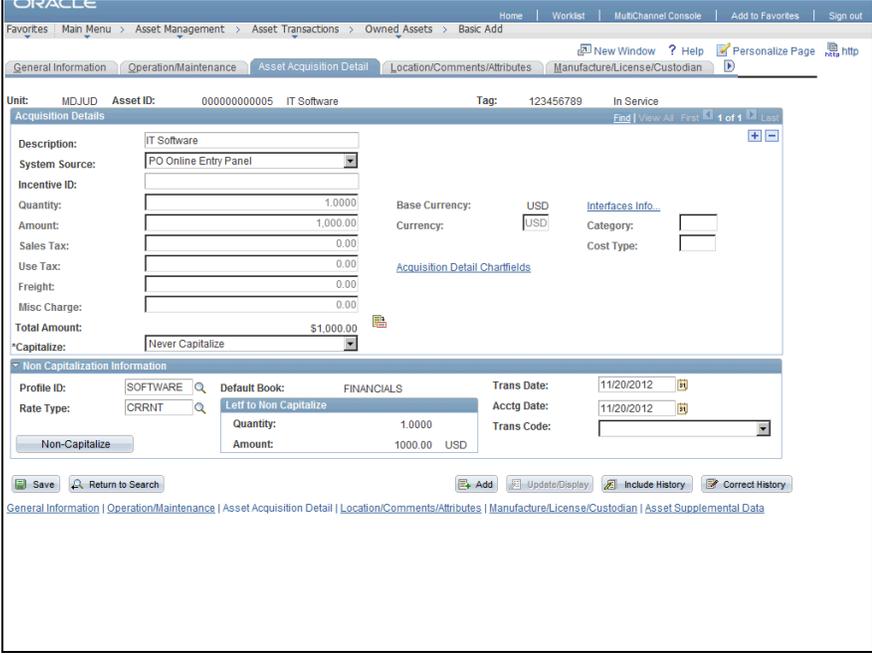


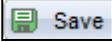
The screenshot shows the Oracle GEARS Asset Management interface. The breadcrumb trail is: Home > Worklist > MultiChannel Console > Add to Favorites > Sign out > Favorites > Main Menu > Asset Management > Asset Transactions > Owned Assets > Basic Add. The active tab is 'Asset Acquisition Detail'. The asset information is as follows:

- Unit: MDJUD Asset ID: 000000000005 IT Software Tag: 123456789 Received
- Description: IT Software Short Desc: IT Softwar
- CAP #: Seq #: 123456789
- Asset Class: Tag Number: 123456789
- Asset Type: IT Software Auction Status:
- Asset Subtype: Region Code:
- *Asset Status: Received (Not in Service) Capitalized Asset
- Acquisition Date: 11/20/2012 New Asset
- Placement Date: 11/20/2012 Available For Use
- Collateral Asset: In Physical Use
- *Acquisition Code: Purchased Composite Asset
- FERC Code: Composite Asset ID:
- Financing Code:
- Fair Value: 0.000 Appraisal Date:
- Replacement Cost: Last Update:
- Index Name:
- Subindex Name:
- Parent/Child: None Parent ID:
- Profile ID: SOFTWARE

Buttons at the bottom include: Book Page, Set R and D Info, Attachments (0), and Fair Value Details.

Step	Action
35.	Click the Asset Status list. 
36.	Click the In Service list item. 
37.	Click the Asset Acquisition Detail tab. 



Step	Action
38.	Click the Save button. 
39.	Note the asset now has a status of In Service .
40.	You have successfully completed <i>Loading an Asset and Place In Service</i> . You have learned how to: - Load an asset and place it "In Service" End of Procedure.

Lesson 3: Creating an IT Software Asset Online

Lesson Overview

Generally, IT Software assets are loaded to Asset Management using the **Transaction Loader** interface, which retrieves asset information from Purchasing and/or Payables. However, you may need to add an asset manually using the **Basic Add** function.

Lesson Objectives

After completing this lesson, you will be able to:

- Create an IT Software asset using the **Basic Add** pages.

3.1 Creating an IT Software Asset Online

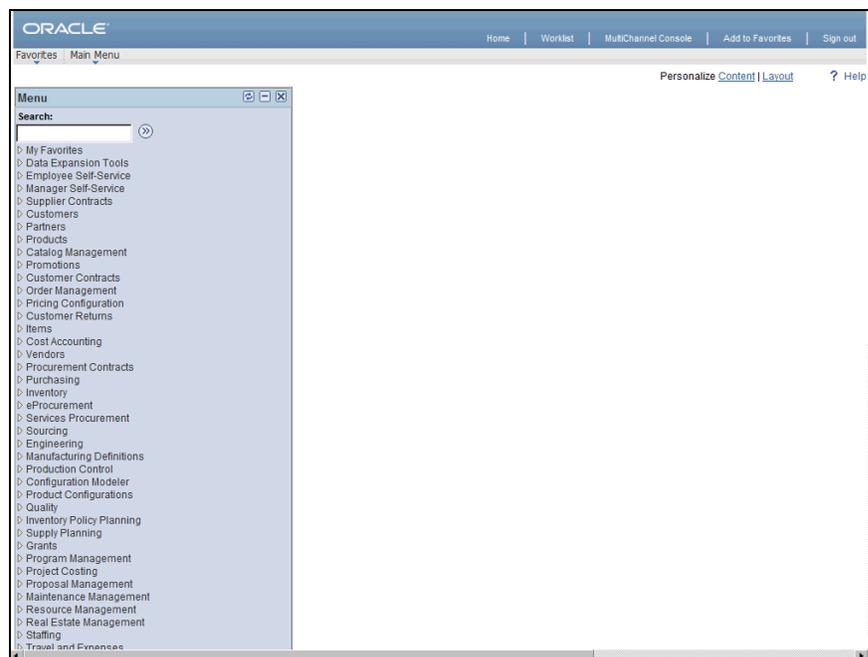
In this topic, you will learn how to create an IT Software asset directly in Asset Management using the **Basic Add** component. The **Basic Add** pages allow you to enter and update asset information manually in Asset Management. **Basic Add** can be used as needed. You may consider using it to update information about the asset that was not captured during receipt or voucher entry or when you want to add expense information about the assets for which vouchers (invoices) have not been entered in Payables.

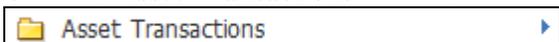
After completing this topic, you will be able to:

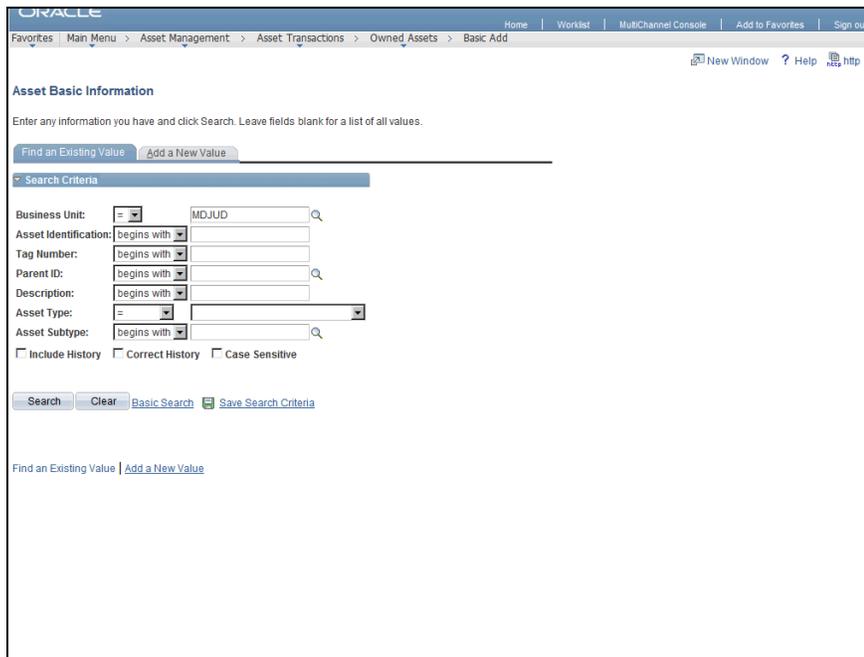
- Manually add / update asset information in Asset Management

Procedure

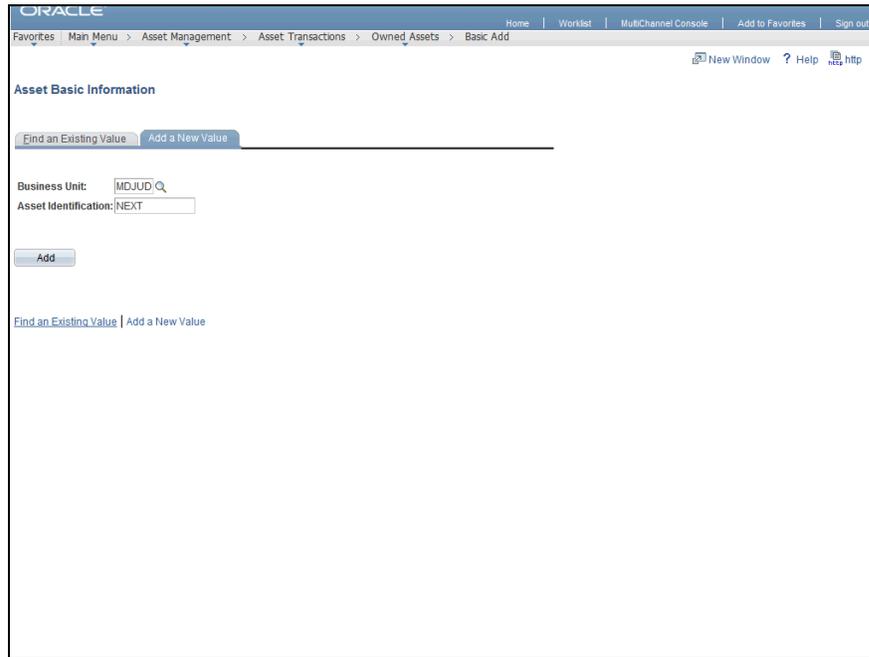
In this topic, you will add an IT Software asset manually using the **Basic Add** component.

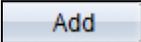


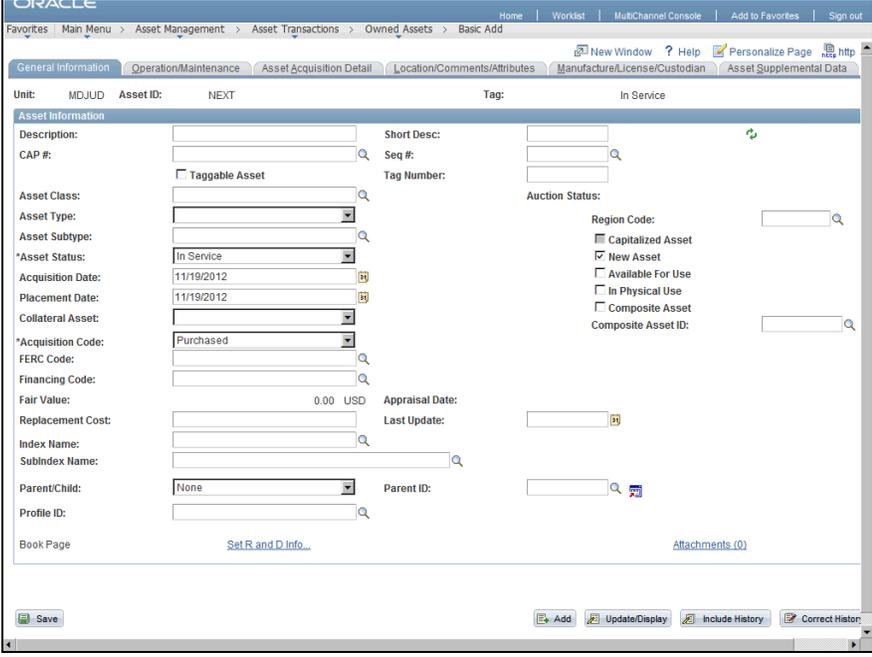
Step	Action
1.	Begin by navigating to the Asset Basic Information page. Click the Main Menu button. 
2.	Click the Menu not sorted - click to sort in ascending order button. 
3.	Click the Asset Management menu. 
4.	Click the Asset Transactions menu item. 
5.	Click the Owned Assets menu. 
6.	Click the Basic Add menu. 



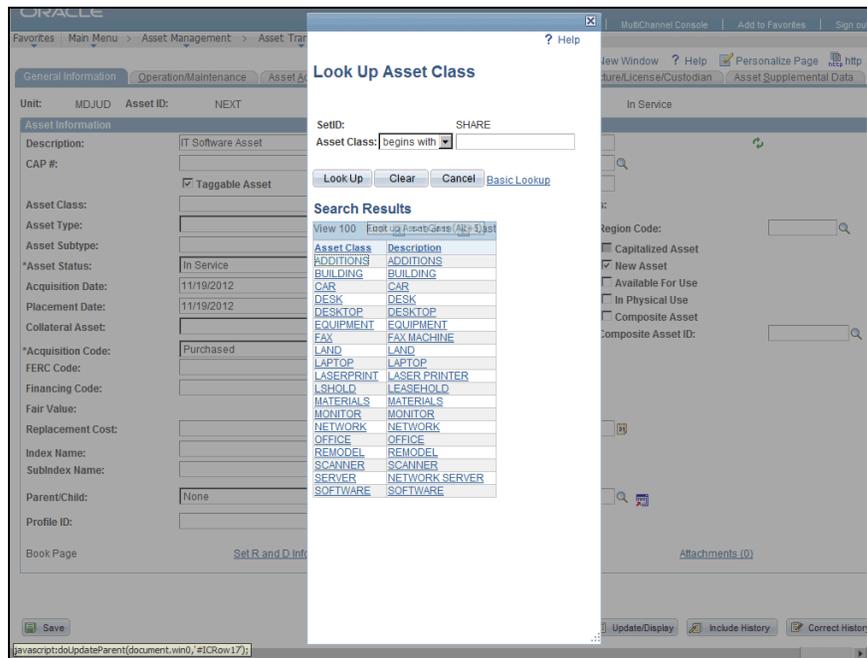
Step	Action
7.	The Asset Basic Information Search page displays. The Asset Basic Information page allows you to search for or create a basic asset. Click the Add a New Value tab. 

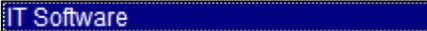


Step	Action
8.	The Business Unit field should self-populate with MDJUD . If not, please do so. Enter the desired information into the Asset ID field. Enter " NEXT ".
9.	Click the Add button. 



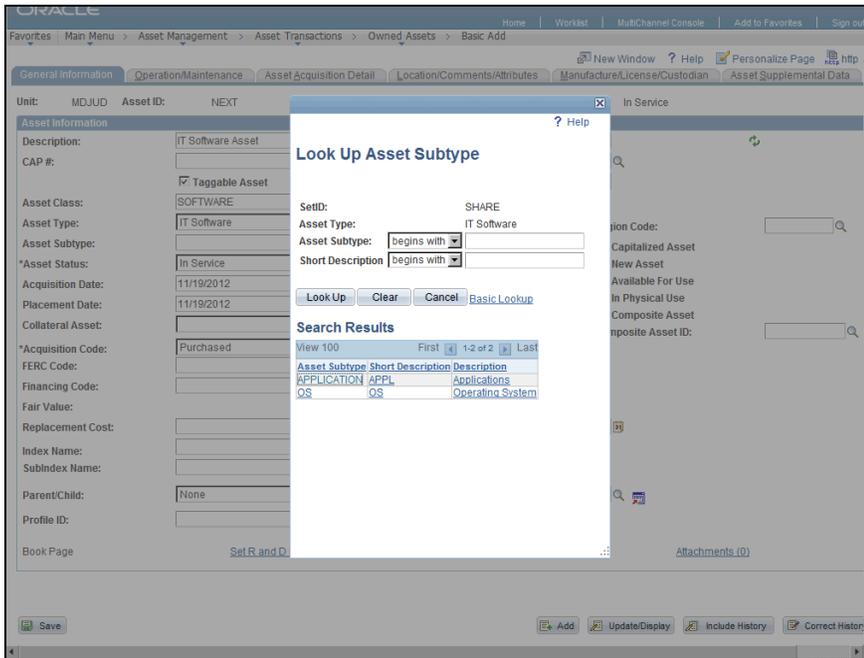
Step	Action
10.	The General Information page displays Use the General Information page to add new asset information.
11.	Enter the desired information into the Description field. Enter " IT Software Asset ".
12.	Enter the desired information into the Short Desc field. Enter " IT Soft ".
13.	Click the Taggable Asset option. 
14.	Enter the desired information into the Tag Number field. Enter " 1234 ".
15.	Click the Look up Asset Class (Alt+5) button. 



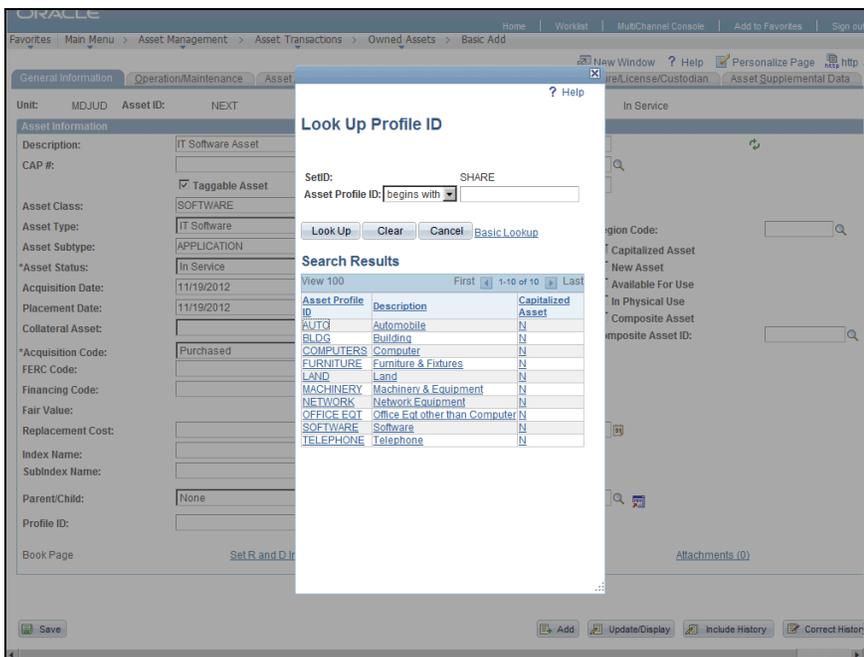
Step	Action
16.	Click the SOFTWARE link. 
17.	Click the Asset Type drop down menu.
18.	Click the IT Software list item. 
19.	Click the Look up Asset Subtype (Alt+5) button. 

Training Guide

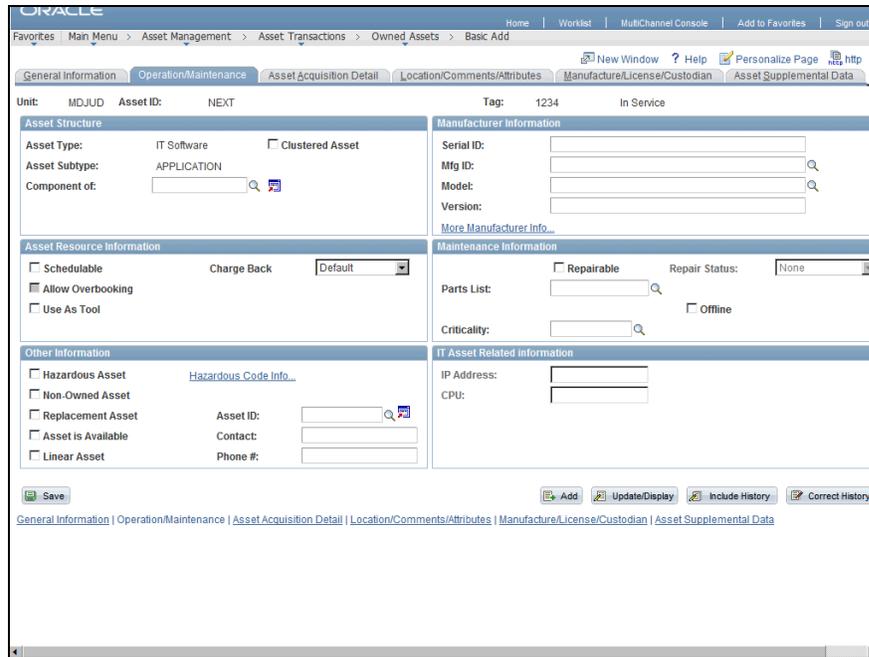
AM210 Managing Assets in GEARS



Step	Action
20.	Click the APPLICATION link.
21.	Click the Profile ID Look up button.



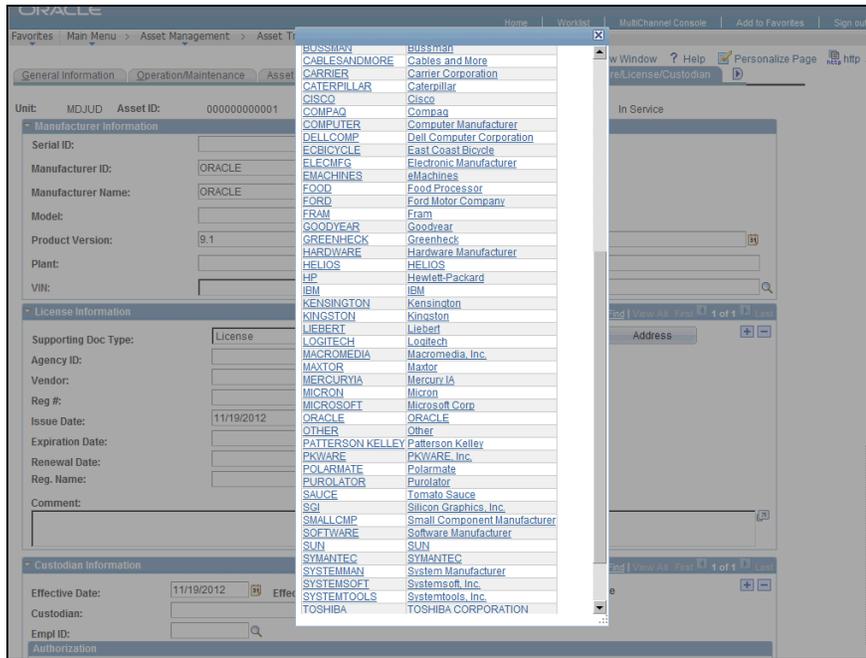
Step	Action
22.	Click the Software link. 
23.	Click the Operation/Maintenance tab. 



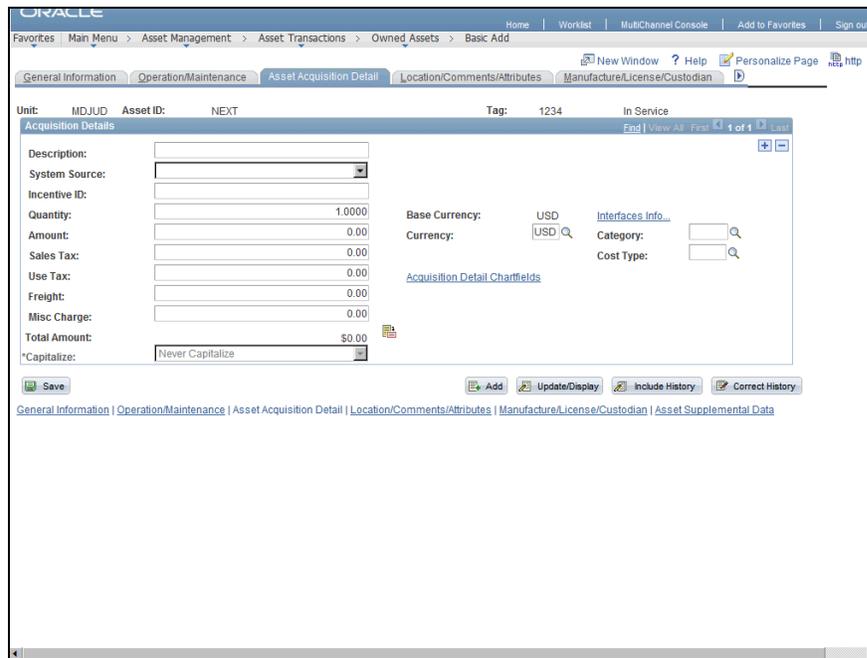
Step	Action
24.	The Operation/Maintenance page displays. The Operation/Maintenance page allows you to enter specific details about the asset's make or use.
25.	You will be primarily using the Manufacturer Information section of this tab.
26.	Click the Look up Mfg ID (Alt+5) button. 

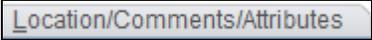
Training Guide

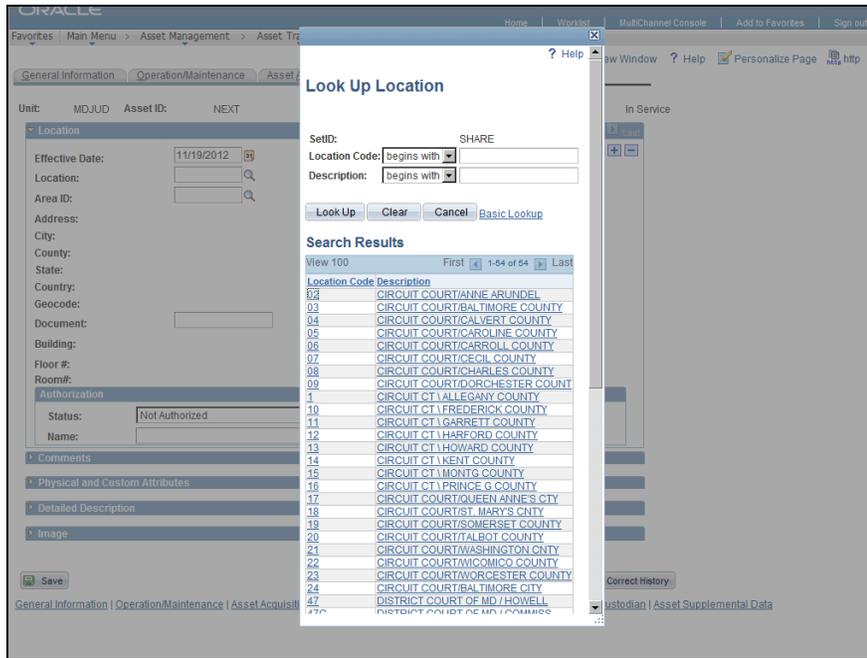
AM210 Managing Assets in GEARS



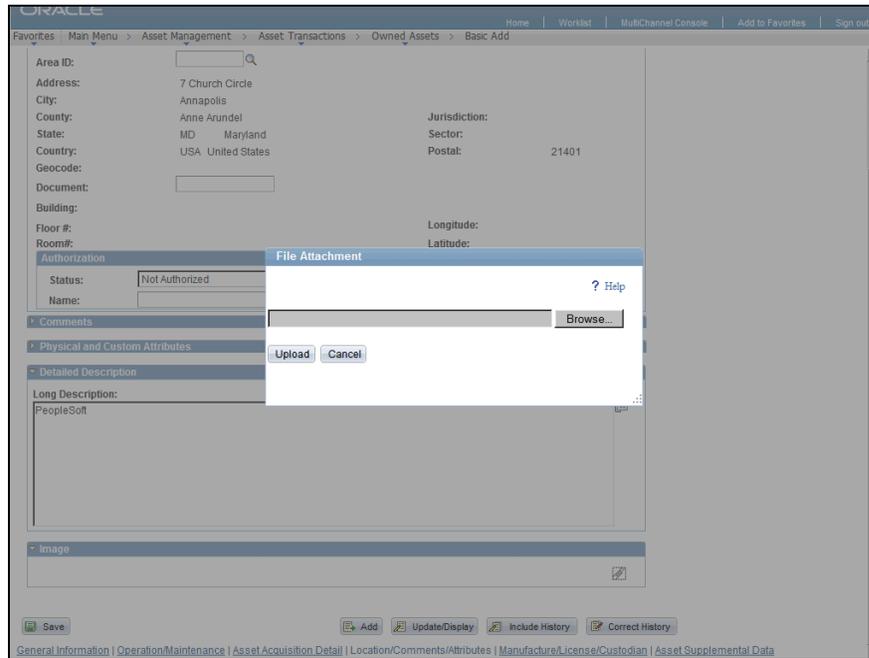
Step	Action
27.	Click the ORACLE link. 
28.	Enter the desired information into the Version field. Enter " 9.1 ".
29.	Click the Asset Acquisition Detail tab. 



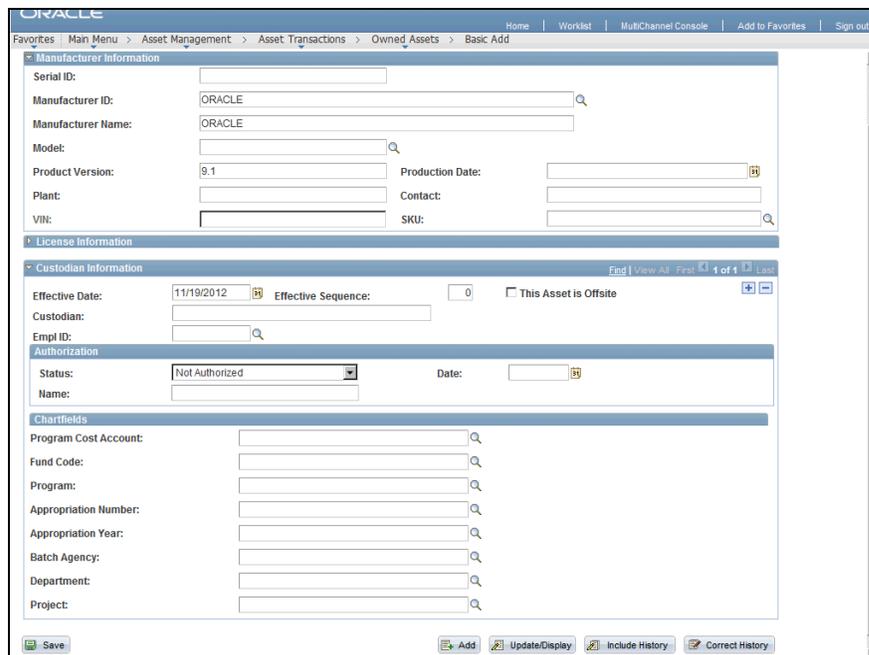
Step	Action
30.	The Asset Acquisition Details page displays. Use the Asset Acquisition Details page to specify how the asset was acquired. This page also helps you specify the cost and acquisition details of the components that make up an asset.
31.	Click the System Source list. 
32.	Click the AM Online Entry Page list item. 
33.	Enter the desired information into the Amount field. Enter " 1000 ".
34.	Click the Location/Comments/Attributes tab. 
35.	The Location/Comments/Attributes page displays. Use the Location/Comments/Attributes page to enter location information, comments, and physical attributes for an asset.
36.	Click the Location Look up button. 

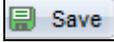


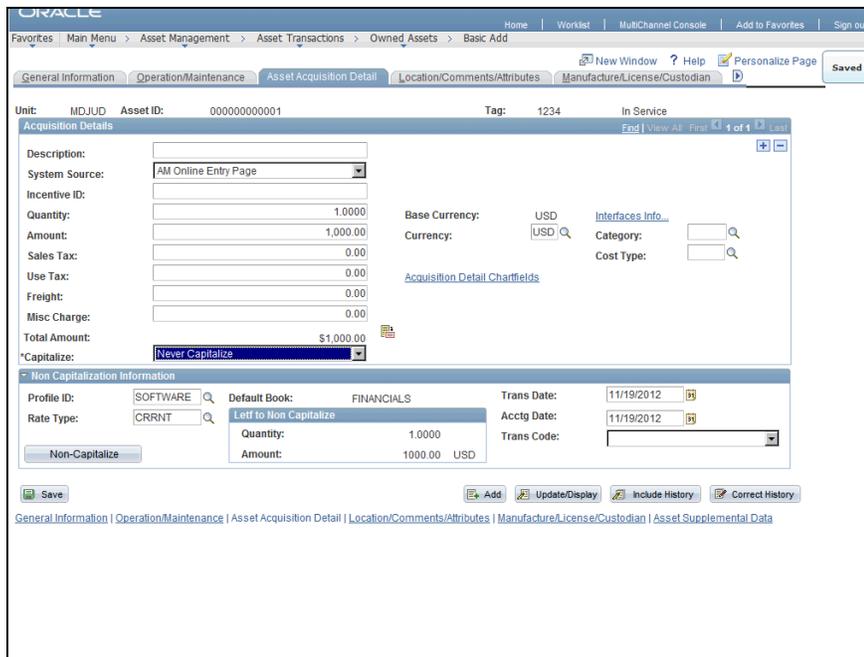
Step	Action
37.	Click the 02 link. 
38.	Click the Expand section button for the Detailed Description section. 
39.	Enter the desired information into the Long Description field. Enter a valid value, e.g. " PeopleSoft ".
40.	Click the Expand section button for the Image section. 
41.	Click the Add Image button. 



Step	Action
42.	Here you can upload an image of the asset if desired. Click the Cancel button to continue without uploading. 
43.	Click the Manufacture/License/Custodian link. 



Step	Action
44.	The Manufacture/License/Custodian page displays. Use the Manufacture/License/Custodian page to enter custodial information, maintain license information, and keep track of information about and from the manufacturer.
45.	Click the Expand section button for the License Information section to enter any license related information about the software asset. 
46.	Enter any applicable information in the Custodian field as needed. 
47.	Move the scrollbar downward.
48.	Click the Save button. 



Step	Action
49.	Note the Asset ID generated by the system upon Saving, and the temporary popup message that says "Saved" in the upper right hand corner.

Step	Action
50.	You have successfully completed <i>Creating IT Software Asset Online</i> . You have learned how to: - Create an IT software asset. End of Procedure.

Lesson 4: Running the Magic Report

Lesson Overview

The AOC Magic Report is a query that captures information entered during purchase order and receipt entry in the GEARS Purchasing application. **NOTE:** Only information entered during purchase order and receipt entry will be displayed on the Magic Report.

The Magic Report should be run after a receipt for a non-IT Software asset has been created or after a receipt has been updated or cancelled in Purchasing. For example, if a non-IT software asset was returned and not replaced, the associated receipt should be updated to reflect the returned quantity(ies) and the Magic Report should be generated and provided to the appropriate personnel so that this information is updated in Magic.

NOTE: Changes made to a purchase order containing non-IT software asset lines may prompt an update to the associated receipt(s). In this case, the Magic Report should be run to capture updates to both the purchase order and the associated receipt(s).

The Magic Report is generated using the Query Viewer. Run the 'AOC_MAGIC_REPORT' query to retrieve non-IT Software asset information entered in GEARS.

Lesson Objectives

After completing this lesson, you will be able to:

- Generate the AOC Magic Report

4.1 Running the Magic Report

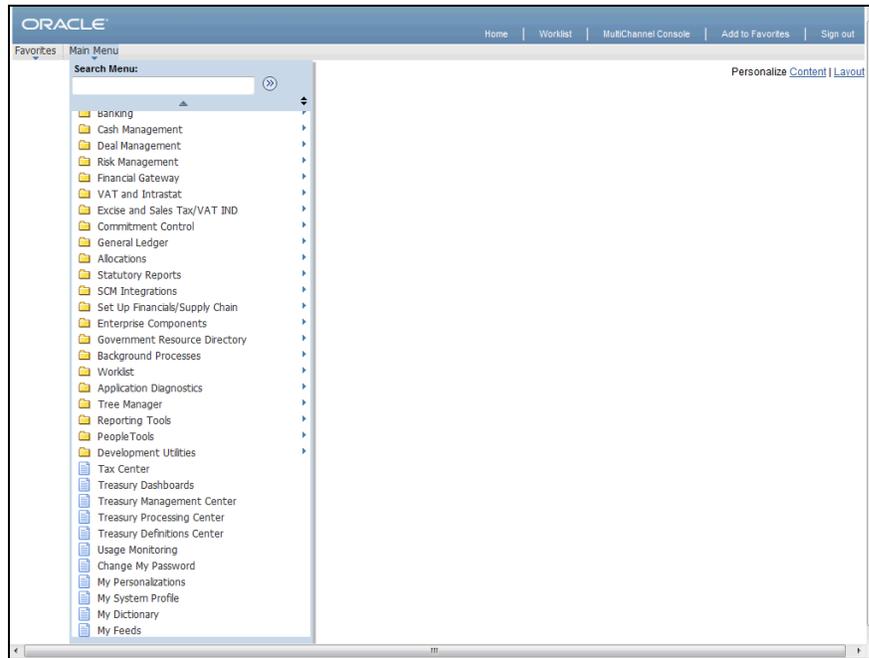
Run the Magic Report query after a receipt has been created, updated or cancelled in the GEARS Purchasing application.

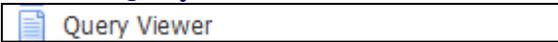
After completing this topic, you will be able to:

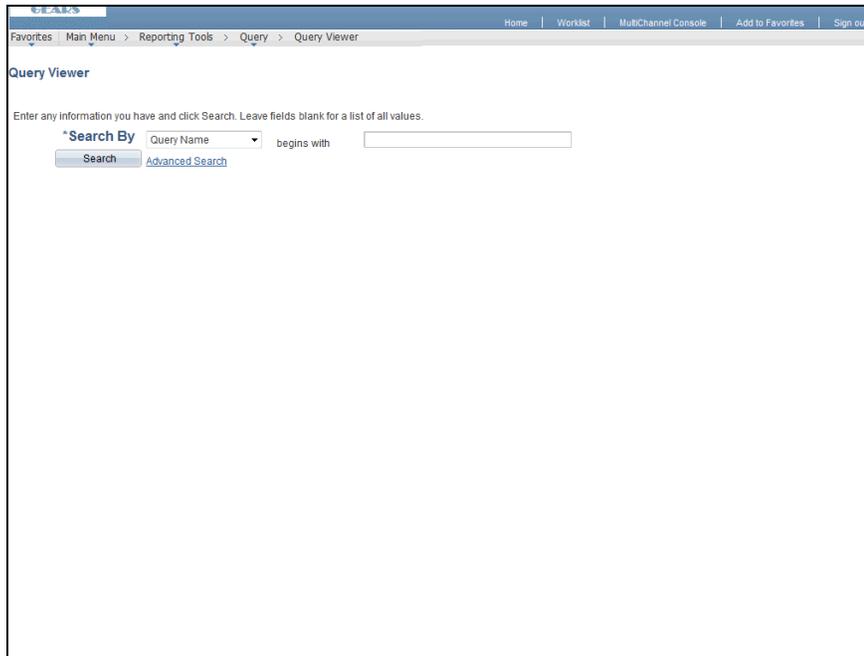
- Generate the AOC Magic Report

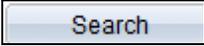
Procedure

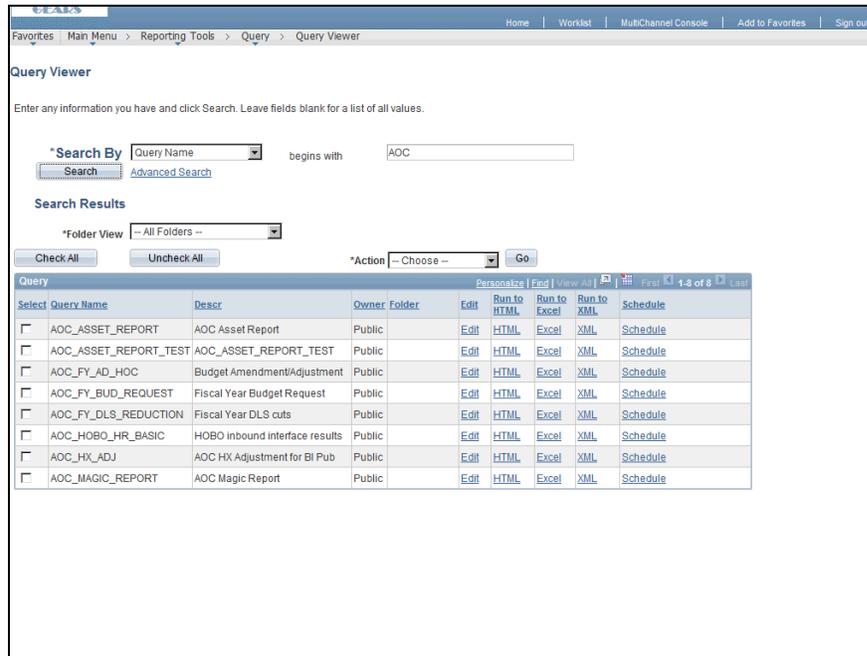
In this topic, you will run the Magic report for a non-IT software asset for which a receipt has been created in the Purchasing application.



Step	Action
1.	<p>Begin by navigating to the Query Viewer search page.</p> <p>Click the Reporting Tools menu.</p> 
2.	<p>Click the Query menu.</p> 
3.	<p>Click the Query Viewer menu.</p> 



Step	Action
4.	The Query Viewer search page displays. Search for the ' AOC_MAGIC_REPORT ' query. Reenter the full query name or partial query name in the Search By field to narrow your search results.
5.	Click the Search button. 
6.	Queries matching the criteria entered display in the Query search results grid.



Query Viewer

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

*Search By begins with

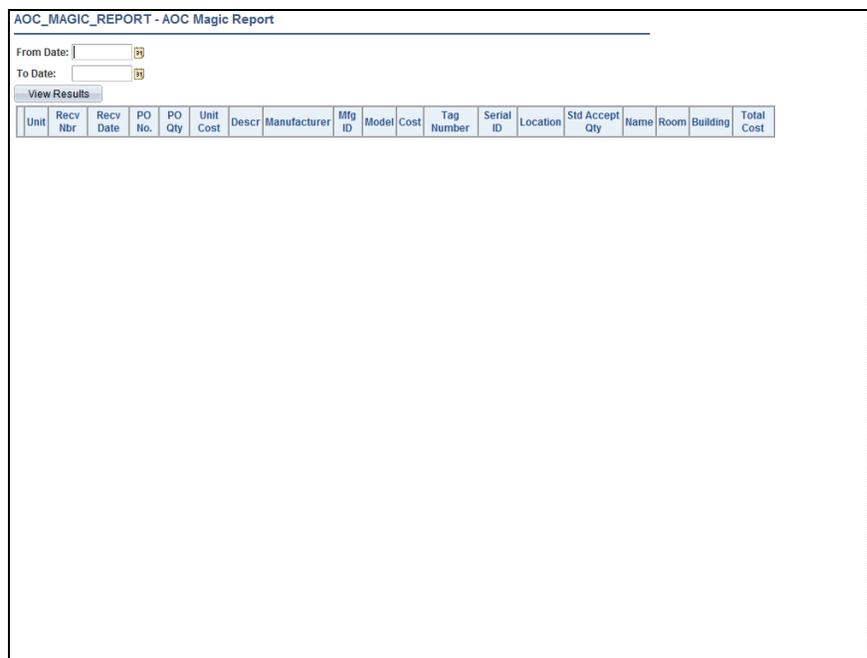
Search Results

*Folder View

*Action

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	AOC_ASSET_REPORT	AOC Asset Report	Public		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	AOC_ASSET_REPORT_TEST	AOC_ASSET_REPORT_TEST	Public		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	AOC_FY_AD_HOC	Budget Amendment/Adjustment	Public		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	AOC_FY_BUD_REQUEST	Fiscal Year Budget Request	Public		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	AOC_FY_DLS_REDUCTION	Fiscal Year DLS cuts	Public		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	AOC_HOBO_HR_BASIC	HOBO inbound interface results	Public		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	AOC_HX_ADJ	AOC HX Adjustment for BI Pub	Public		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	AOC_MAGIC_REPORT	AOC Magic Report	Public		Edit	HTML	Excel	XML	Schedule

Step	Action
7.	<p>Run the Magic Report to an Excel spreadsheet that can be printed and used to update asset information in the Magic system.</p> <p>Click the Excel link for the AOC_MAGIC_REPORT query.</p> <p>Excel</p>

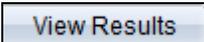


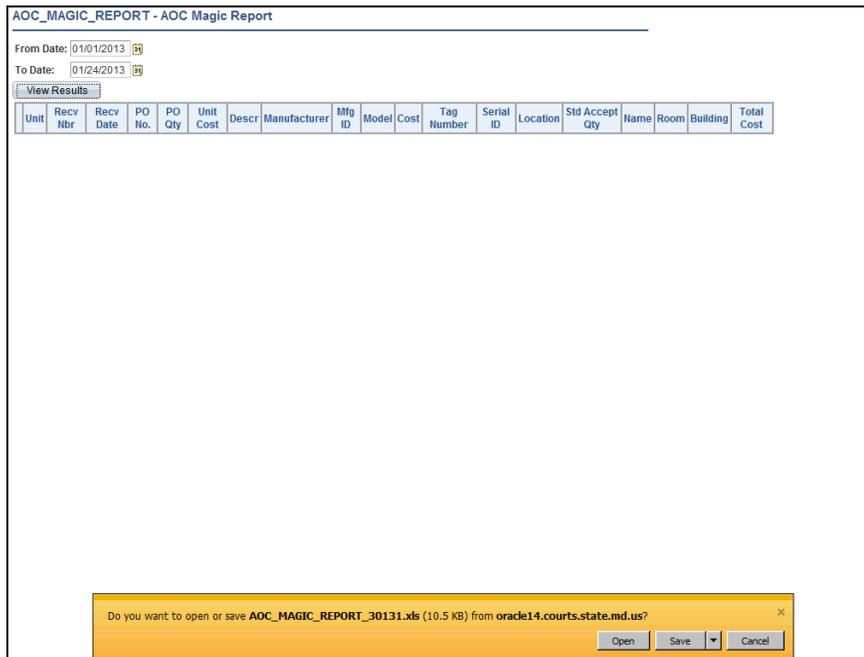
AOC_MAGIC_REPORT - AOC Magic Report

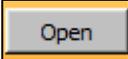
From Date:

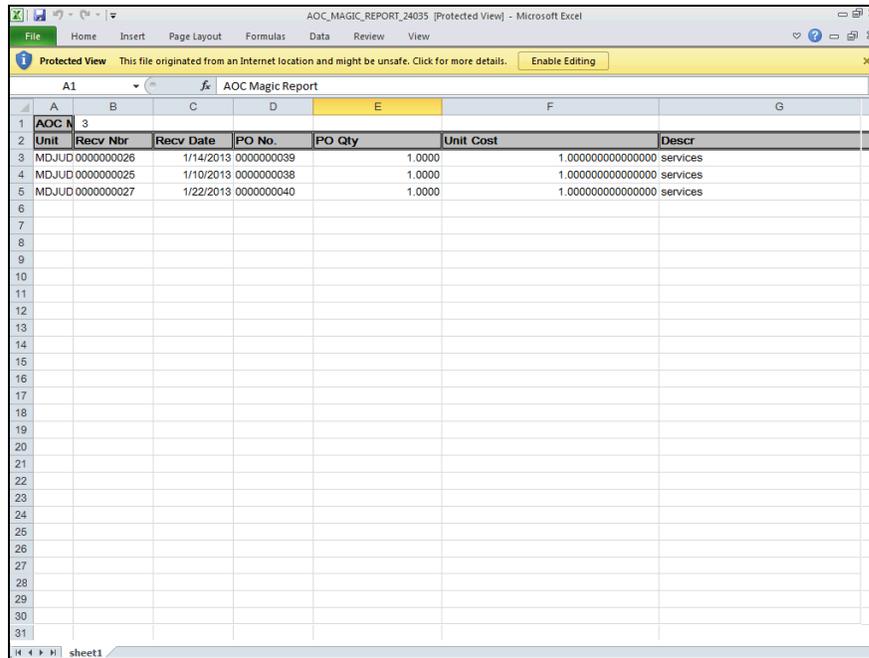
To Date:

Unit	Recv Nbr	Recv Date	PO No.	PO Qty	Unit Cost	Descr	Manufacturer	Mfg ID	Model	Cost	Tag Number	Serial ID	Location	Std Accept Qty	Name	Room	Building	Total Cost
------	----------	-----------	--------	--------	-----------	-------	--------------	--------	-------	------	------------	-----------	----------	----------------	------	------	----------	------------

Step	Action
8.	<p>The AOC Magic Report query opens in a new browser window.</p> <p>Before running the report, you must enter a receipt date range for which you want to view data.</p> <p>NOTE: The results you retrieve are driven by the date the original receipt was entered in GEARS.</p> <p>Enter a date in the From Date and To Date fields.</p>
9.	<p>Click the View Results button.</p> 



Step	Action
10.	<p>A dialog box displays.</p> <p>Click the Open button to open the Excel spreadsheet.</p> <p>NOTE: If you run the AOC Magic Report to an HTML format, after the query results display you must click the Excel Spreadsheet link, then click "Open" to view the report in an Excel spreadsheet.</p> 



Unit	Recv Nbr	Recv Date	PO No.	PO Qty	Unit Cost	Descr
MDJUD 0000000026		1/14/2013	0000000039	1.0000	1.0000000000000000	services
MDJUD 0000000025		1/10/2013	0000000038	1.0000	1.0000000000000000	services
MDJUD 0000000027		1/22/2013	0000000040	1.0000	1.0000000000000000	services

Step	Action
11.	The Magic Report query results open in an Excel spreadsheet. The number of records returned from the query displays in the top left corner.
12.	Review the report results and print, if desired.
13.	You have successfully completed <i>Running the Magic Report</i> . You have learned how to: - Run the Magic Report using Query Viewer End of Procedure.

Lesson 5: Managing Assets

Lesson Overview

GEARS Asset Management allows you maintain asset information including updating basic asset information, transferring assets between locations and retiring them when the asset is no longer in use.

Lesson Objectives

After completing this lesson you will be able to:

- Search for an asset
- View and update asset information
- Transfer an asset from one location to another
- Retire an asset
- Reinstate an asset

5.1 Using the Search for an Asset Page

The **Search for an Asset** process allows you to employ a variety of search criteria in many different combinations to locate specific assets. You can search for assets by Location, Asset ID, Asset Status, Profile ID, PO Unit, or any combination of these or other fields. For instance, employing this search page, you could quickly locate all IT Software assets, with **Profile ID** of "SOFTWARE", and an "In Service" status.

Once the asset or assets meeting the search criteria have been located, they appear on a search results list. You can then select the particular asset you want to work with. Using the **Drill-Down To** list, you can view details about the asset. This list provides access to asset management transactions including:

- **Asset Basic Information:** Review/modify asset information on the **Basic Add** pages
- **Print an Asset:** Review and print asset information.

NOTE: The **Business Unit** field is a required field.

The basic steps to use the **Search for an Asset** page are shown in the flow below.

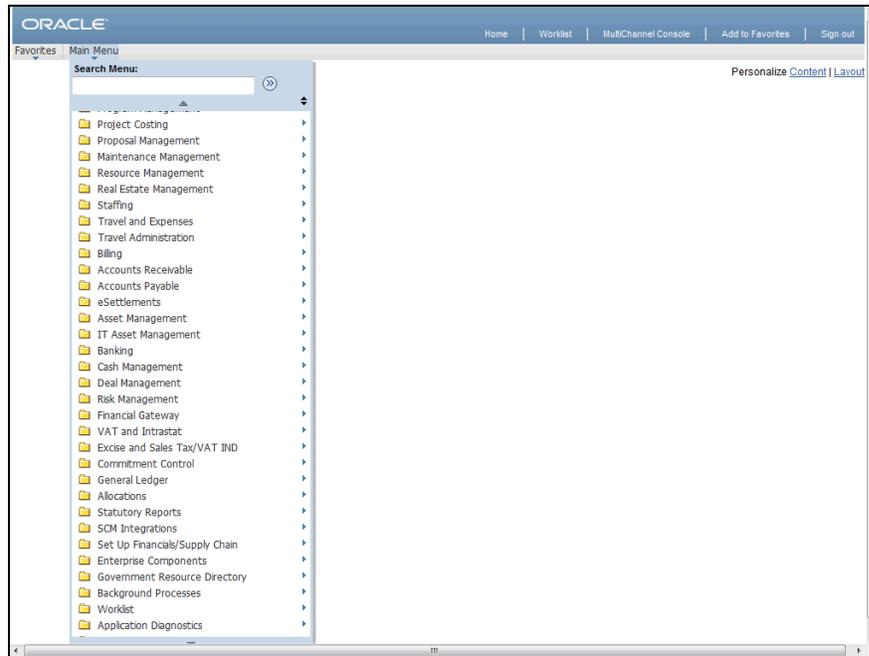


After completing this topic, you will be able to:

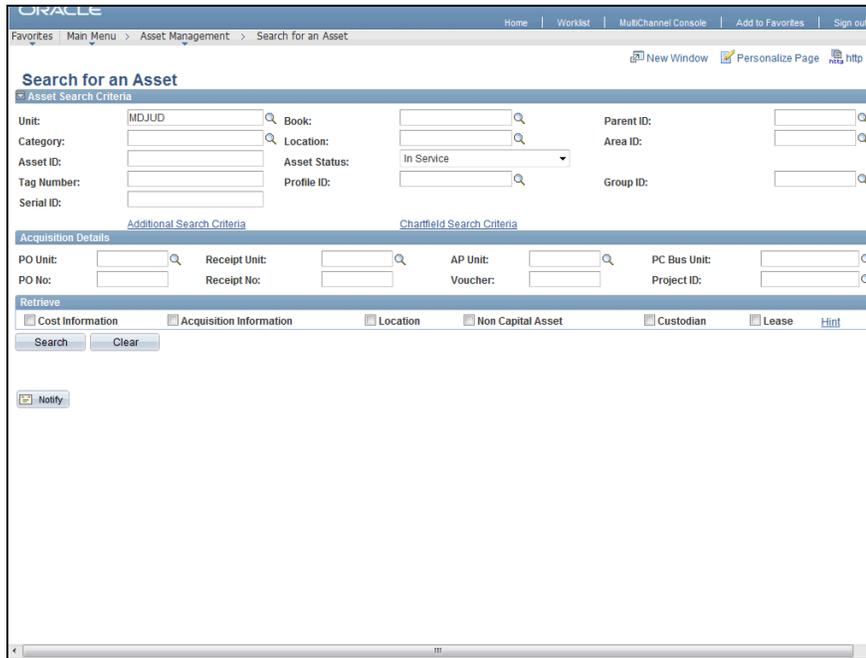
- Use the **Search for an Asset** page to locate and access asset details

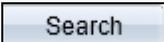
Procedure

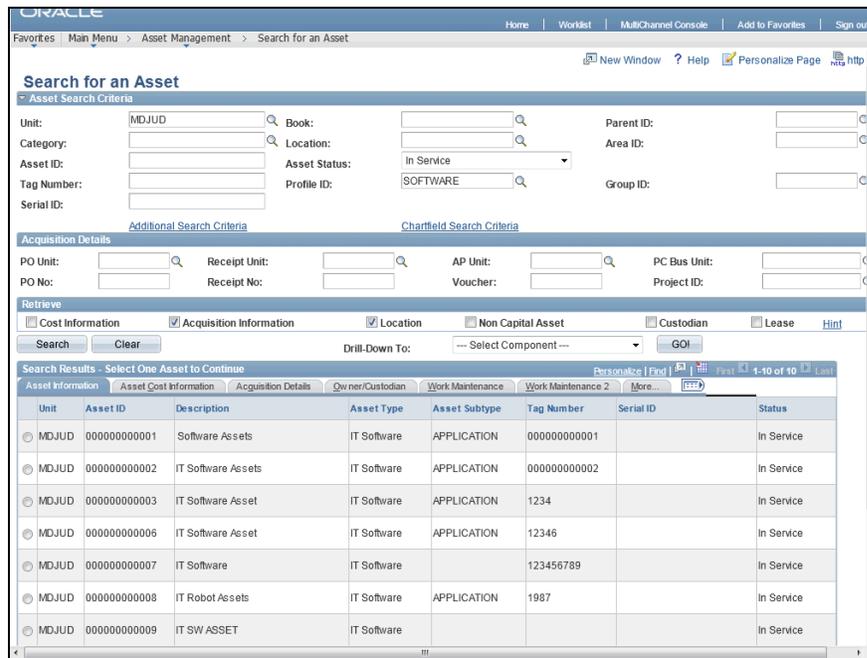
In this topic, you will use the **Search for an Asset** page to locate an IT Software asset and view the asset details using the drill-down feature.



Step	Action
1.	Begin by navigating to the Search for an Asset page. Click the Asset Management menu. 
2.	Click the Search for an Asset menu. 

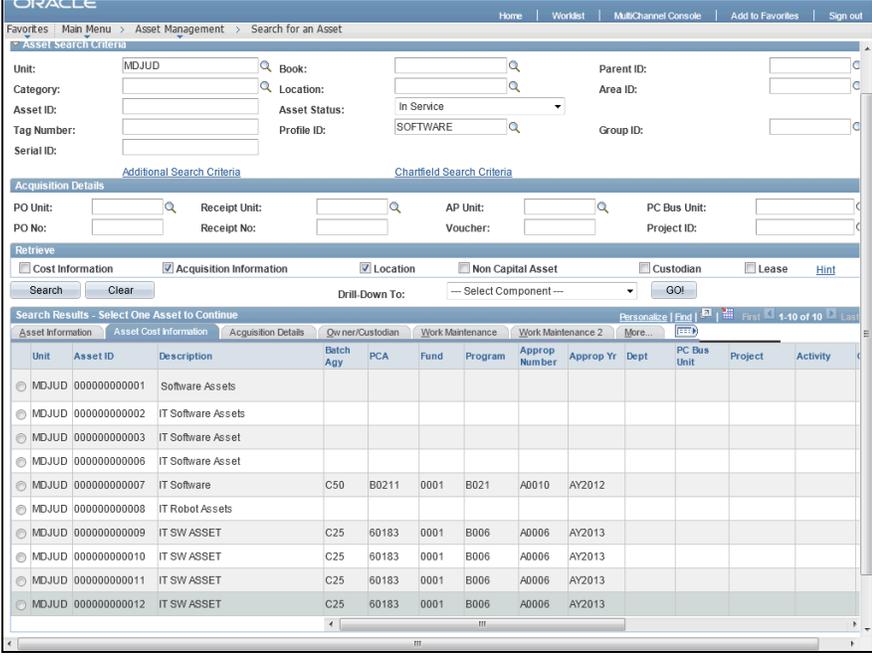


Step	Action
3.	<p>The Search for an Asset page displays.</p> <p>On this page you can search for an asset using several search criteria options and combinations to find a specific asset.</p> <p>Use the Asset Search Criteria, Acquisition Details, and Retrieve group boxes to establish the search criteria.</p>
4.	<p>In the Asset Search Criteria section, enter basic asset criteria.</p> <p>Entering more specific criteria will narrow your search results. For example, enter the Asset ID, if known.</p>
5.	<p>In the Acquisition Details section, specify acquisition information such as purchase order, receipt, voucher, or project ID (if applicable) values.</p>
6.	<p>In the Retrieve section, select information you would like to view in the search results.</p> <p>NOTE: The selection of some options may not retrieve any result if there is not a matching record to retrieve. Modify criteria, if needed.</p>
7.	<p>Click the Search button.</p> 



Unit	Asset ID	Description	Asset Type	Asset Subtype	Tag Number	Serial ID	Status
MDJUD	000000000001	Software Assets	IT Software	APPLICATION	000000000001		In Service
MDJUD	000000000002	IT Software Assets	IT Software	APPLICATION	000000000002		In Service
MDJUD	000000000003	IT Software Asset	IT Software	APPLICATION	1234		In Service
MDJUD	000000000006	IT Software Asset	IT Software	APPLICATION	12346		In Service
MDJUD	000000000007	IT Software	IT Software		123456789		In Service
MDJUD	000000000008	IT Robot Assets	IT Software	APPLICATION	1987		In Service
MDJUD	000000000009	IT SW ASSET	IT Software				In Service

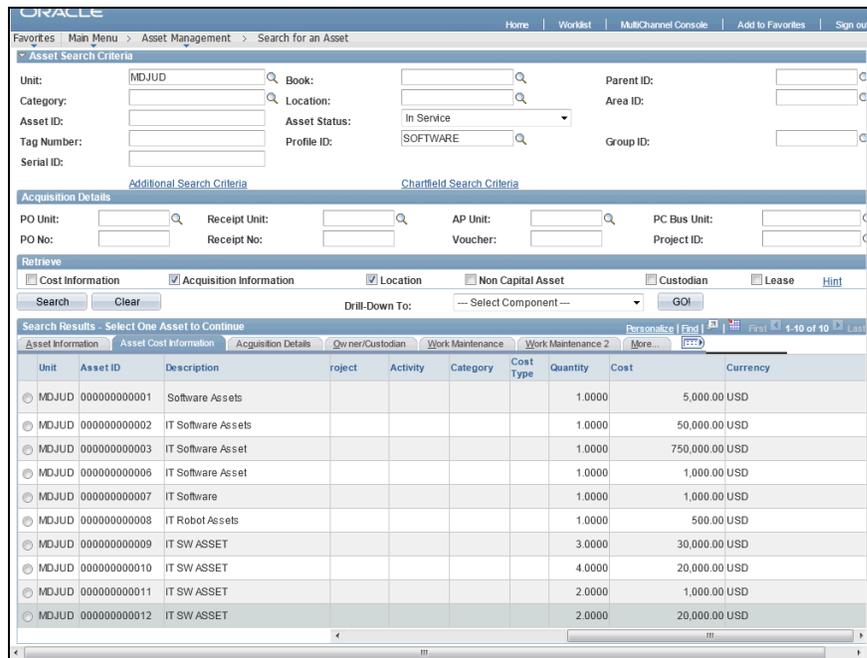
Step	Action
8.	The assets matching your search criteria display on the Search Results grid below. Use the tabs in this section to view details about the asset(s) displayed to help you locate the asset you want to work with or view.
9.	On the Asset Information tab, basic asset information displays, including the asset ID, description, asset type and sub-type, tag number, serial number and status. NOTE: This information is retrieved regardless of what criteria is selected.
10.	Click the Asset Cost Information tab to view cost information including funding sources (Chartfields) and asset costs charged to the associated budget. 



The screenshot shows the Oracle GEARS Asset Management search interface. The 'Asset Search Criteria' section includes fields for Unit (MDJUD), Book, Parent ID, Category, Location, Area ID, Asset ID, Asset Status (In Service), Profile ID (SOFTWARE), Tag Number, Profile ID, and Group ID. Below this are 'Acquisition Details' for PO Unit, Receipt Unit, AP Unit, PC Bus Unit, PO No, Receipt No, Voucher, and Project ID. A 'Retrieve' section has checkboxes for Cost Information, Acquisition Information, Location, Non Capital Asset, Custodian, and Lease. The 'Search Results' table is displayed with columns for Unit, Asset ID, Description, Batch Agg, PCA, Fund, Program, Approp Number, Approp Yr, Dept, PC Bus Unit, Project, and Activity. The table lists several IT Software Assets with their respective cost information.

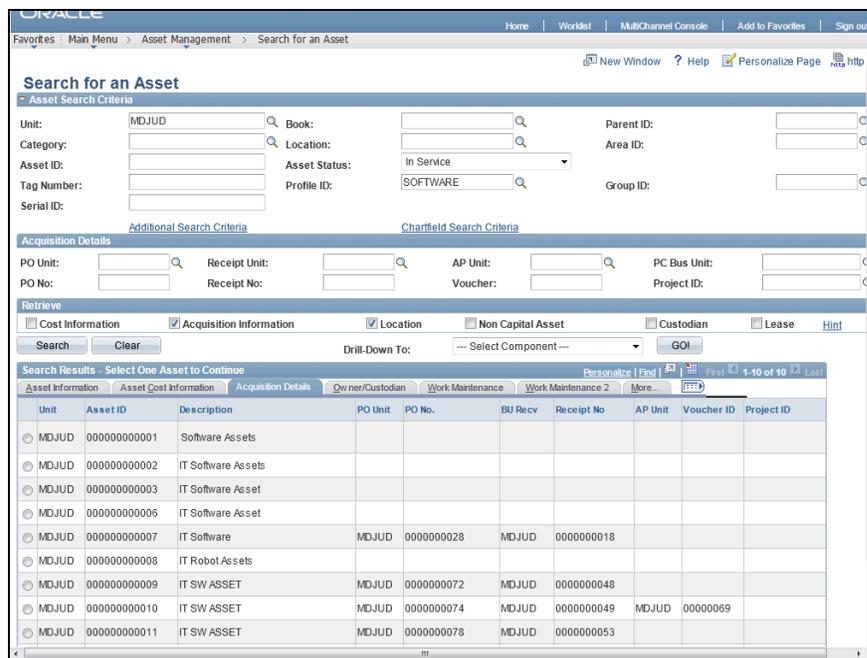
Unit	Asset ID	Description	Batch Agg	PCA	Fund	Program	Approp Number	Approp Yr	Dept	PC Bus Unit	Project	Activity
MDJUD	000000000001	Software Assets										
MDJUD	000000000002	IT Software Assets										
MDJUD	000000000003	IT Software Asset										
MDJUD	000000000005	IT Software Asset										
MDJUD	000000000007	IT Software	C50	B0211	0001	B021	A0010	AY2012				
MDJUD	000000000008	IT Robot Assets										
MDJUD	000000000009	IT SW ASSET	C25	60183	0001	B006	A0006	AY2013				
MDJUD	000000000010	IT SW ASSET	C25	60183	0001	B006	A0006	AY2013				
MDJUD	000000000011	IT SW ASSET	C25	60183	0001	B006	A0006	AY2013				
MDJUD	000000000012	IT SW ASSET	C25	60183	0001	B006	A0006	AY2013				

Step	Action
11.	NOTE: Cost information is retrieved if any of the cost fields are used in the search criteria, or the Cost Information check box is selected
12.	The Asset Cost Information tab displays the Chartfield combination (i.e., the funding source) used when acquiring the asset. These values include: <ul style="list-style-type: none"> - Batch Agency - PCA - Fund - Program - Appropriation Number - Appropriation Year - Department - Project/Grant Information (if applicable)
13.	Move the scrollbar to view the asset cost information.

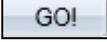


Unit	Asset ID	Description	Project	Activity	Category	Cost Type	Quantity	Cost	Currency
MDJUD	000000000001	Software Assets					1.0000	5,000.00	USD
MDJUD	000000000002	IT Software Assets					1.0000	50,000.00	USD
MDJUD	000000000003	IT Software Asset					1.0000	750,000.00	USD
MDJUD	000000000006	IT Software Asset					1.0000	1,000.00	USD
MDJUD	000000000007	IT Software					1.0000	1,000.00	USD
MDJUD	000000000008	IT Robot Assets					1.0000	500.00	USD
MDJUD	000000000009	IT SW ASSET					3.0000	30,000.00	USD
MDJUD	000000000010	IT SW ASSET					4.0000	20,000.00	USD
MDJUD	000000000011	IT SW ASSET					2.0000	1,000.00	USD
MDJUD	000000000012	IT SW ASSET					2.0000	20,000.00	USD

Step	Action
14.	The total cost of the asset displays in the Cost column. You can also view the quantity displayed in the Quantity column.
15.	Click the Acquisition Details tab to view purchase order, receipt, voucher or project/grant information. 



Unit	Asset ID	Description	PO Unit	PO No.	BU Recv	Receipt No.	AP Unit	Voucher ID	Project ID
MDJUD	000000000001	Software Assets							
MDJUD	000000000002	IT Software Assets							
MDJUD	000000000003	IT Software Asset							
MDJUD	000000000006	IT Software Asset							
MDJUD	000000000007	IT Software	MDJUD	0000000028	MDJUD	0000000018			
MDJUD	000000000008	IT Robot Assets							
MDJUD	000000000009	IT SW ASSET	MDJUD	0000000072	MDJUD	0000000048			
MDJUD	000000000010	IT SW ASSET	MDJUD	0000000074	MDJUD	0000000049	MDJUD	000000009	
MDJUD	000000000011	IT SW ASSET	MDJUD	0000000078	MDJUD	0000000053			

Step	Action
16.	NOTE: Acquisition details are retrieved if any of the fields in the Acquisition Details section are used in the search criteria, or if the Acquisition Information check box is selected.
17.	Review purchase order, receipt, voucher and/or project/grant information (if applicable).
18.	Click the More... tab to view Location and Manufacture information. 
19.	To view more detail, update basic asset information or print an asset, select the asset. Click the radio button for the asset you want to view or work with. 
20.	Click the Drill-Down To list. 
21.	Select from the following component options: - Asset Basic Information - Print an Asset Click the applicable list item. 
22.	Click the GO! button. 
23.	The component page displays. Perform the necessary tasks, i.e., print or update the basic asset information.
24.	You have successfully completed <i>Using the Search for an Asset Page</i> . You have learned how to: - Use the <i>Search for an Asset</i> page. End of Procedure.

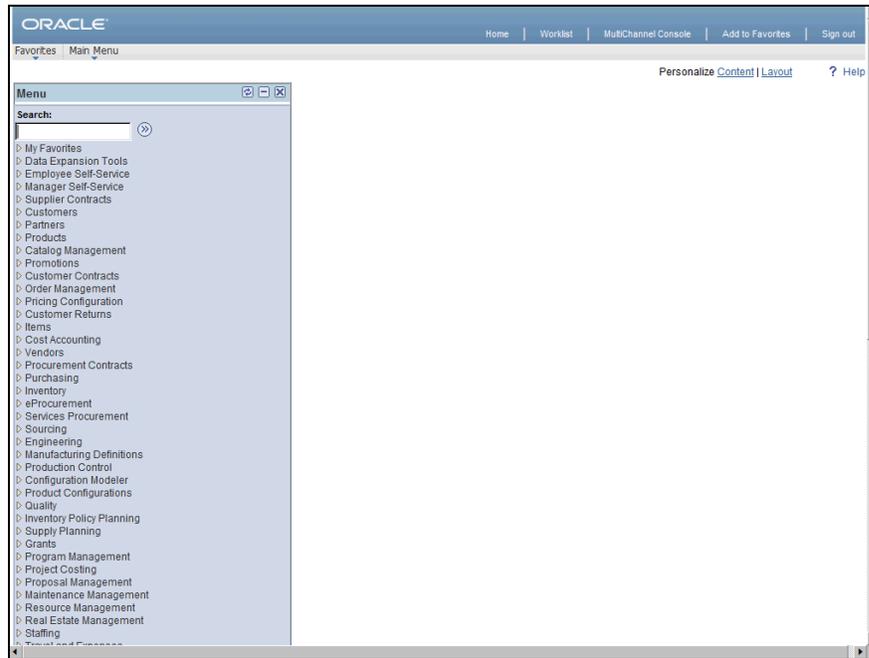
5.2 Transferring Assets from One Location to Another

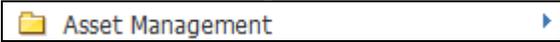
After completing this topic, you will be able to:

- Transfer an asset from one location to another within the Judiciary

Procedure

In this topic you will learn how to transfer an asset from one Judiciary **Location** to another.



Step	Action
1.	<p>Begin by navigating to the Search for an Asset page.</p> <p>Click the Main Menu button.</p> 
2.	<p>Click the Asset Management menu.</p> 
3.	<p>Click the Search for an Asset menu.</p> 

Training Guide

AM210 Managing Assets in GEARS



ORACLE Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Asset Management > Search for an Asset

New Window ? Help Personalize Page http

Search for an Asset

Asset Search Criteria

Unit: MDJUD Book: Parent ID:

Category: Location: Area ID:

Asset ID: Asset Status: In Service Group ID:

Tag Number: Profile ID:

Serial ID:

Additional Search Criteria Chartfield Search Criteria

Acquisition Details

PO Unit: Receipt Unit: AP Unit: PC Bus Unit:

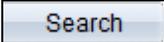
PO No: Receipt No: Voucher: Project ID:

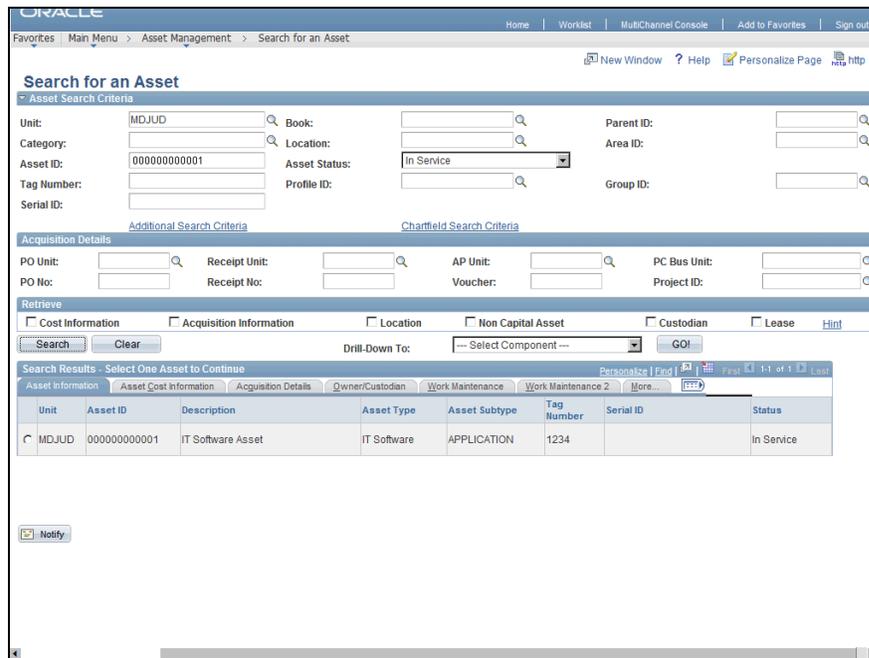
Retrieve

Cost Information Acquisition Information Location Non Capital Asset Custodian Lease [Hint](#)

Search Clear

Notify

Step	Action
4.	The Search for an Asset page displays. Enter search criteria to find the asset you want to transfer. Enter the Asset ID, if known.
5.	Click the Search button. 



Search for an Asset

Asset Search Criteria

Unit: MDJUD Book: Parent ID: Area ID: Group ID:

Category: Location: Asset Status: In Service

Asset ID: 000000000001 Profile ID:

Tag Number: Serial ID:

Acquisition Details

PO Unit: Receipt Unit: AP Unit: PC Bus Unit:

PO No: Receipt No: Voucher: Project ID:

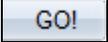
Retrieve

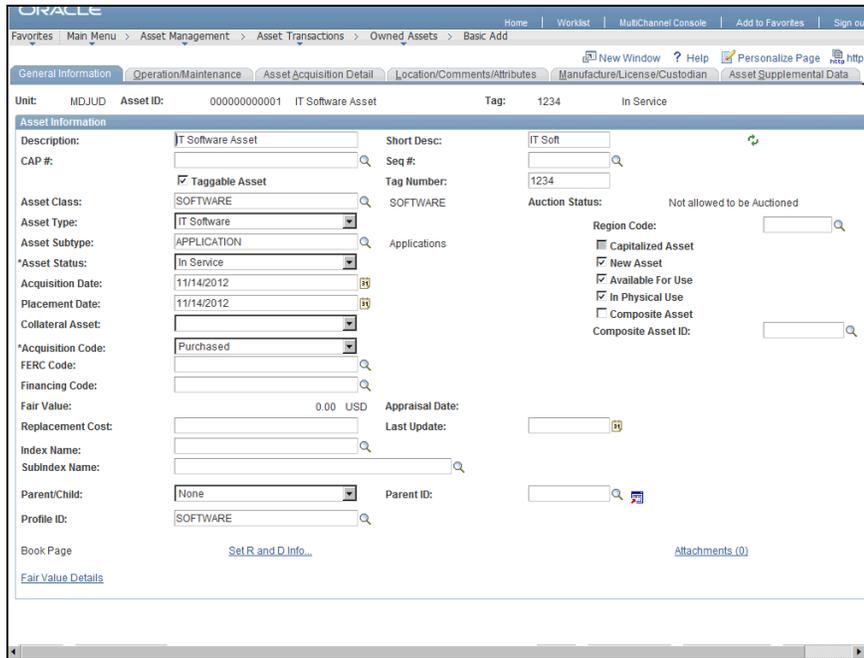
Cost Information Acquisition Information Location Non Capital Asset Custodian Lease Hint

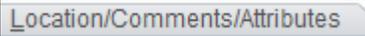
Search Clear Drill-Down To: -- Select Component -- GO!

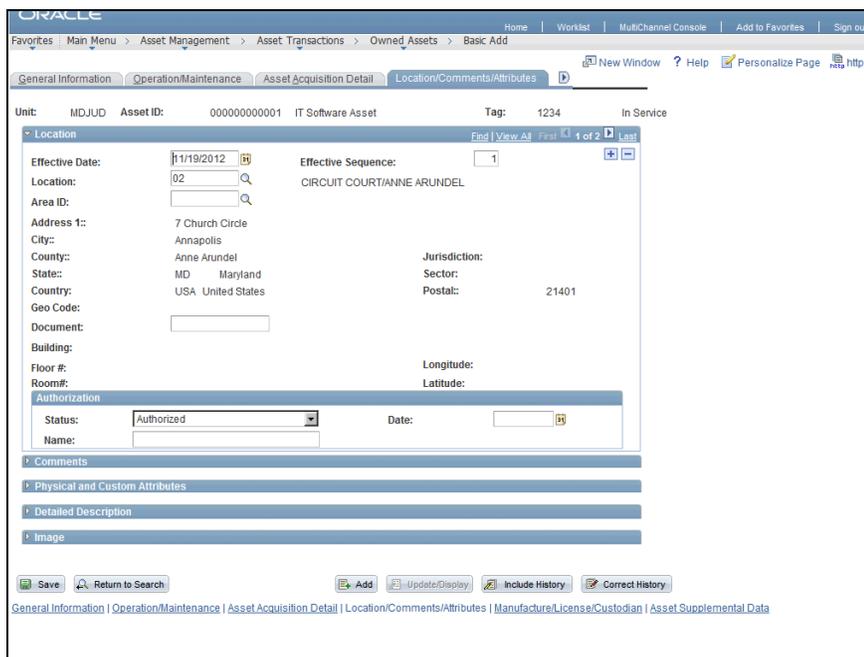
Search Results - Select One Asset to Continue

Unit	Asset ID	Description	Asset Type	Asset Subtype	Tag Number	Serial ID	Status
MDJUD	000000000001	IT Software Asset	IT Software	APPLICATION	1234		In Service

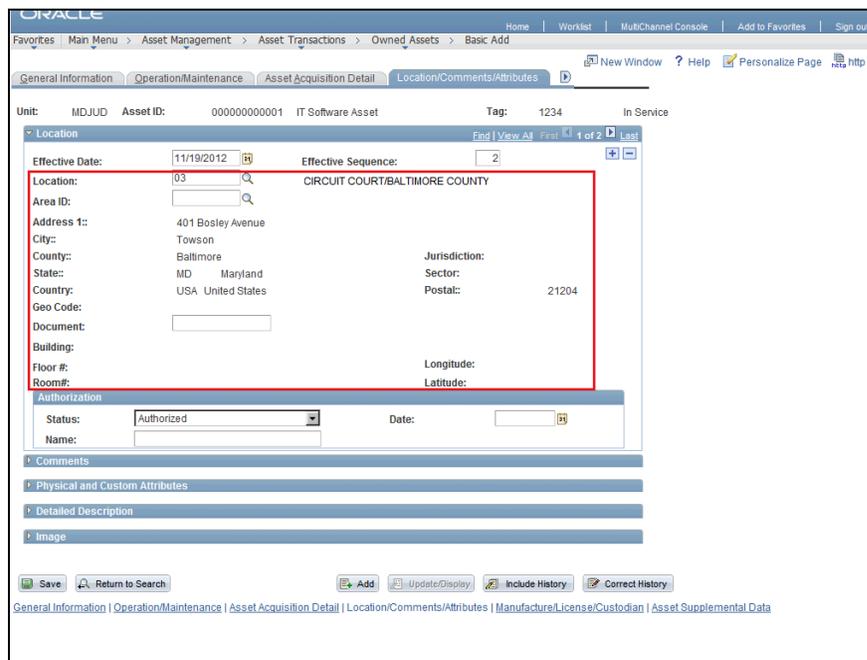
Step	Action
6.	Assets matching your search criteria display in the Search Results grid. Click the radio button to select the asset you want to transfer. 
7.	Click in the Drill-Down To: list. 
8.	Click the Asset Basic Information list item. 
9.	Click the GO! button. 

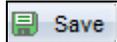


Step	Action
10.	<p>The Basic Add - General Information page displays.</p> <p>Click the Location/Comments/Attributes tab.</p> 



Step	Action
11.	<p>The Location/Comments/Attributes page displays.</p> <p>NOTE: Take note of the number of Location rows. Verify that you are updating the correct Location row (e.g., you may want to update the most recent effective dated Location row).</p> <p>The number of Location rows is located in the top right corner of the Location section (group box).</p>
12.	<p>Click the Look up Location button.</p> 
13.	<p>The Look Up Location window displays.</p> <p>If the Location you want to select is not displayed, enter search criteria to retrieve the Location.</p>
14.	<p>Click the Location link.</p> 



Step	Action
15.	<p>The Location field is updated with your selection.</p> <p>The address information is also updated.</p>
16.	<p>Click the Save button.</p> 

Step	Action
17.	You have successfully completed <i>Transferring an Asset from One Location to Another</i> topic. You have learned how to: - Transfer an asset from one location to another End of Procedure.

5.3 Retiring an Asset

The Judiciary may find that particular software will no longer be used by the organization. This may be due to an expired license and/or the replacement of a software package currently being used by the Judiciary among other reasons. In cases such as these, you can retire the corresponding IT Software asset in order to track this activity.

Use the **Non-Financial Retire** page to retire an IT Software asset. This page is also used to reinstate assets that were prematurely retired. See topic *5.4 Re-instating an Asset* for more information.

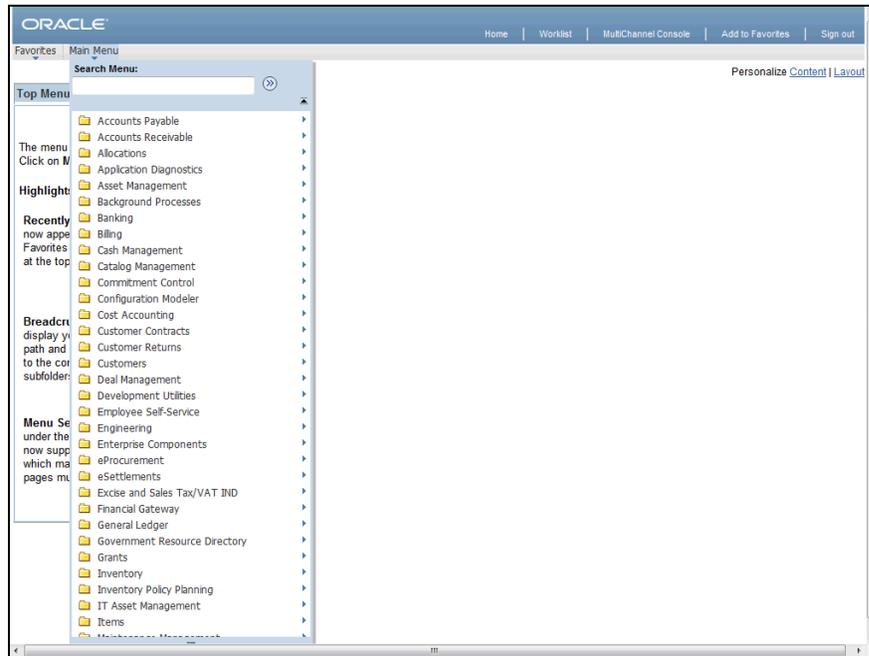
After completing this topic, you will be able to:

- Retire an IT Software asset

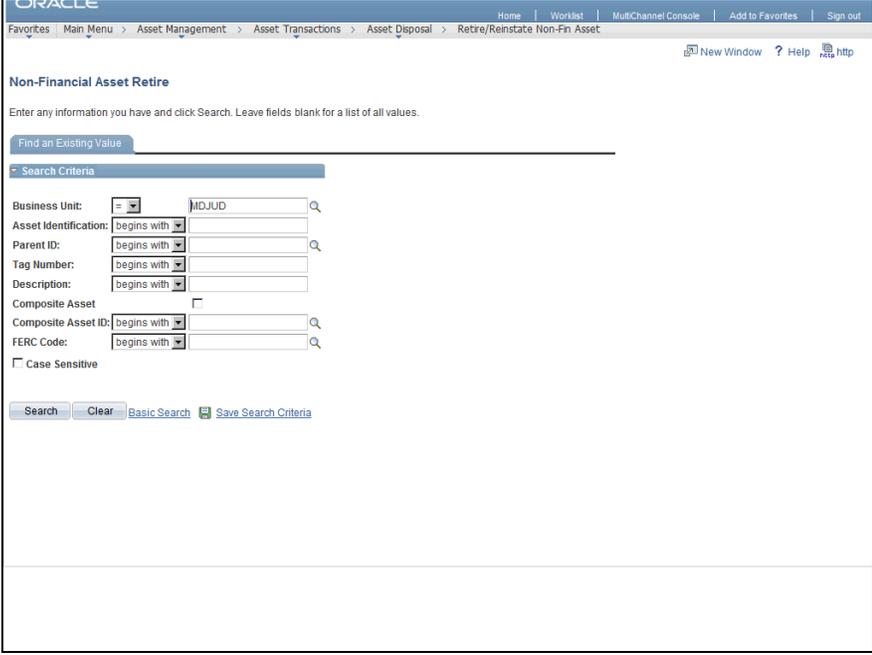
Procedure

Retire an IT Software asset when it will no longer be used by the Judiciary.

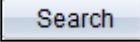
In this topic, you will learn how to retire an IT Software asset using the **Non-Financial Retire** page.

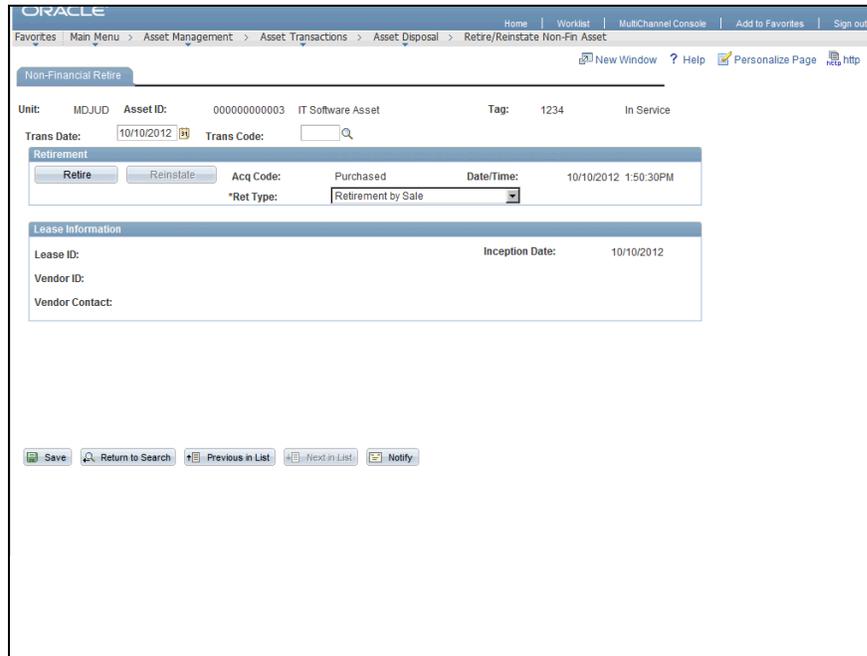


Step	Action
1.	<p>Begin by navigating to the Non-Financial Asset Retire page.</p> <p>Click the Asset Management menu.</p> 
2.	<p>Click the Asset Transactions menu.</p> 
3.	<p>Click the Asset Disposal menu.</p> 
4.	<p>Click the Retire/Reinstate Non- Financial Asset menu.</p> 



The screenshot shows the Oracle GEARS interface for the 'Non-Financial Asset Retire' search. The breadcrumb trail is: Favorites > Main Menu > Asset Management > Asset Transactions > Asset Disposal > Retire/Reinstate Non-Fin Asset. The page title is 'Non-Financial Asset Retire'. Below the title, there is a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A 'Find an Existing Value' button is present. The 'Search Criteria' section includes the following fields: Business Unit (dropdown menu with 'MDJUD' entered), Asset Identification (dropdown menu with 'begins with' selected), Parent ID (dropdown menu with 'begins with' selected), Tag Number (dropdown menu with 'begins with' selected), Description (dropdown menu with 'begins with' selected), Composite Asset (checkbox), Composite Asset ID (dropdown menu with 'begins with' selected), and FERC Code (dropdown menu with 'begins with' selected). There is also a 'Case Sensitive' checkbox. At the bottom of the search criteria section, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Step	Action
5.	The Non-Financial Asset Retire search page displays. Verify that the Business Unit displays "MDJUD".
6.	Enter additional search criteria to narrow your search results. If you leave these fields empty, GEARS returns a list of all IT Software assets recorded in Asset Management application. For example, enter the asset ID in the Asset Identification field, the asset description into the Description field, or asset tag number in the Tag Number field, if known.
7.	Click the Search button. 
8.	Assets matching the criteria entered display in the Search Results grid. To select the asset you want to retire, click the asset link. NOTE: When your search criteria retrieves only one asset, you are directed to the Non-Financial Retire page for the specified asset. 



Step	Action
9.	The Non-Financial Retire page displays for the asset you selected.
10.	Verify that the Asset Status is "In Service".
11.	The Trans Date (Transaction Date) field defaults to current date. The transaction date should reflect the date that the retirement actually occurred. Modify the date, if needed.

ORACLE
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Asset Management > Asset Transactions > Asset Disposal > Retire/Reinstate Non-Fin Asset

Non-Financial Retire

Unit: MDJUD Asset ID: 000000000003 IT Software Asset Tag: 1234 In Service

Trans Date: 10/10/2012 Trans Code:

Retirement

Retire Reinstatement Acq Code: Purchased Date/Time: 10/10/2012 1:50:30PM

*Ret Type: Retirement by Sale

Lease Information

Lease ID: Inception Date: 10/10/2012

Vendor ID:

Vendor Contact:

Save Return to Search Previous in List Next in List Notify

Step	Action
12.	Specify the Transaction Code to identify the reason for the retirement. Click the Look up Trans Code button next to the Trans Code field.

ORACLE
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Asset Management > Asset Transactions > Asset Disposal > Retire/Reinstate Non-Fin Asset

Non-Financial Retire

Unit: MDJUD Asset ID: 000000000003 IT Software Asset Tag: 1234 In Service

Trans Date: 10/10/2012 Trans Code:

Retirement

Retire Reinstatement Acq Code: Purchased Date/Time: 10/10/2012 1:50:30PM

*Ret Type: Retirement by Sale

Lease Information

Lease ID: Inception Date: 10/10/2012

Vendor ID:

Vendor Contact:

Save Return to Search Previous in List Next in List Notify

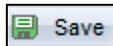
Look Up Trans Code

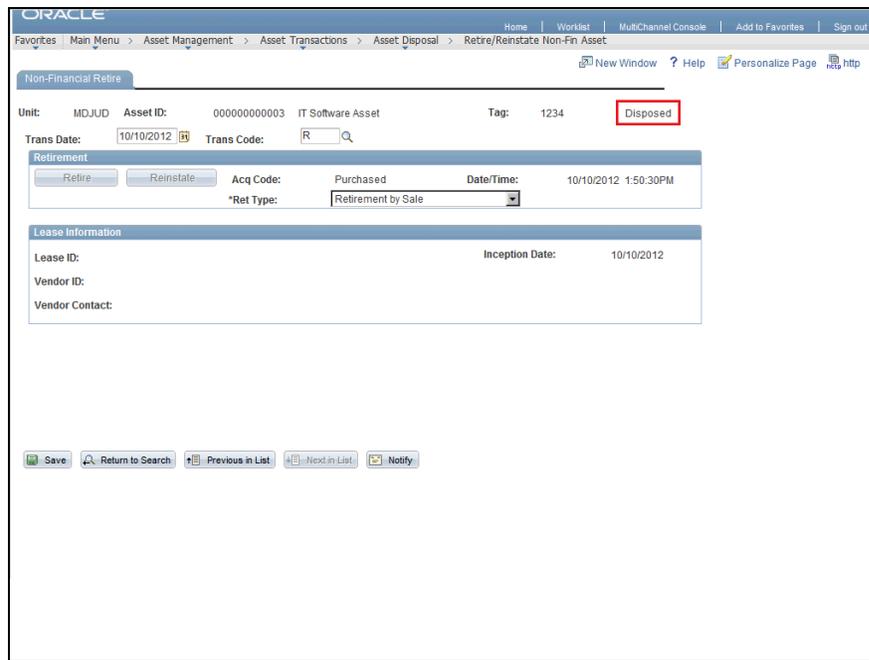
Cancel

Search Results

View 100 First 1-11 of 11 Last

SetID	Transaction Code	Description
SHARE 1		Acquisition-Education Division
SHARE A		Abandoned
SHARE C		Cannibalized
SHARE I		Inventroy
SHARE IP		Investment Property
SHARE N		Donated
SHARE R		Scrap
SHARE RV		Revaluation
SHARE S		Sale
SHARE T		Trade-in
SHARE Y		Casualty

Step	Action
13.	The Look Up Trans Code window displays. Click the appropriate transaction code link. 
14.	Select the appropriate retirement type in the Ret Type (Retirement Type) drop-down list box. NOTE: The Ret Type field is required and indicates the reason for the retirement. This field should correspond to the value entered in the Trans Code field.
15.	Click the Retire button. 
16.	Click the Save button. 



Step	Action
17.	Verify that the Asset Status is "Disposed".
18.	You have successfully completed <i>Retiring an Asset</i> . You have learned how to: - Retire an IT Software asset End of Procedure.

5.4 Reinstating an Asset

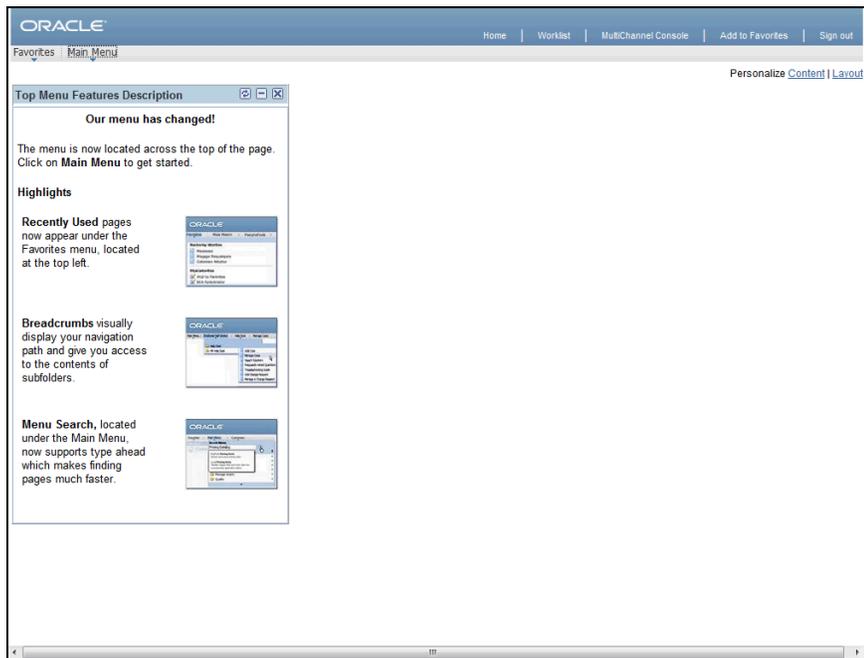
Occasionally, a retired asset needs to be reinstated for various reasons; such as if an asset was retired prematurely. GEARS Asset Management allows you to reinstate retired assets.

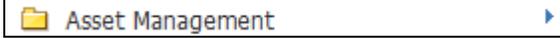
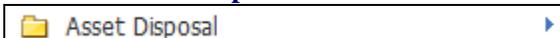
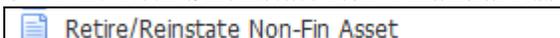
After completing this topic, you will be able to:

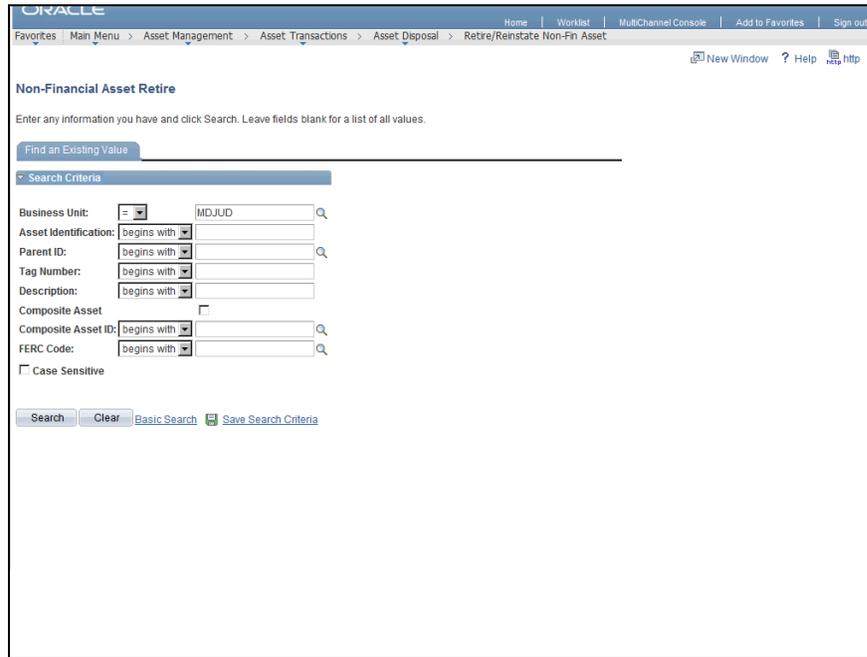
- Reinstating a previously retired asset.

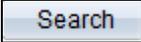
Procedure

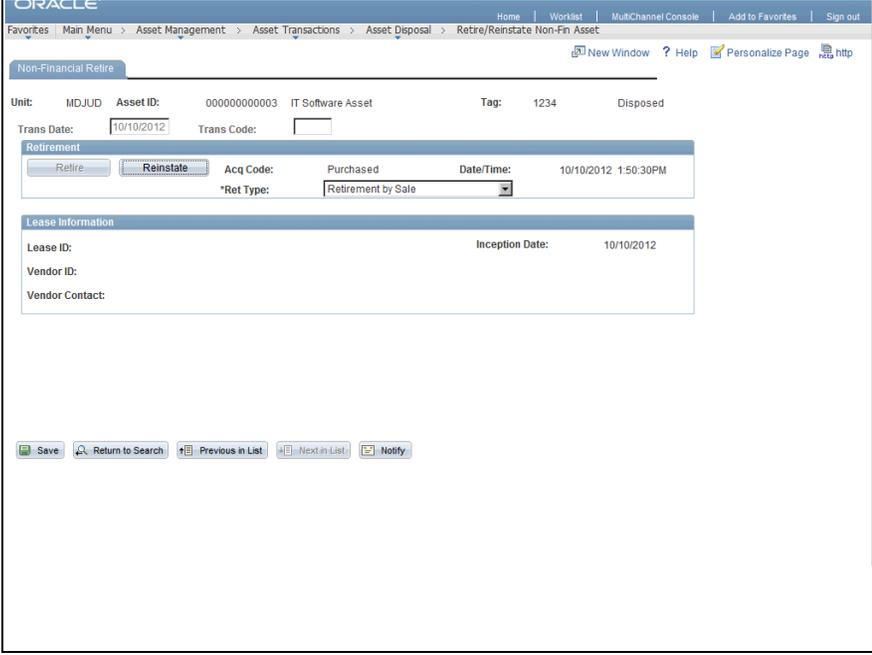
In this topic, you will reinstate a retired IT Software asset that was prematurely retired.



Step	Action
1.	Begin by navigating to the Non-Financial Asset Retire page. Click the Main Menu button. 
2.	Click the Asset Management menu. 
3.	Click the Asset Transactions menu. 
4.	Click the Asset Disposal menu. 
5.	Click the Retire/Reinstate Non-Financial Asset menu. 



Step	Action
6.	Click the Search button. 
7.	Click the 00000000003 link. Notice that the Asset Status is currently Disposed . 



ORACLE
Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Favorites | Main Menu > Asset Management > Asset Transactions > Asset Disposal > Retire/Reinstate Non-Fin Asset

New Window ? Help Personalize Page http

Non-Financial Retire

Unit: MDJUD Asset ID: 000000000003 IT Software Asset Tag: 1234 Disposed

Trans Date: 10/10/2012 Trans Code:

Retirement

Retire **Reinstate** Acq Code: Purchased Date/Time: 10/10/2012 1:50:30PM

*Ret Type: Retirement by Sale

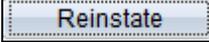
Lease Information

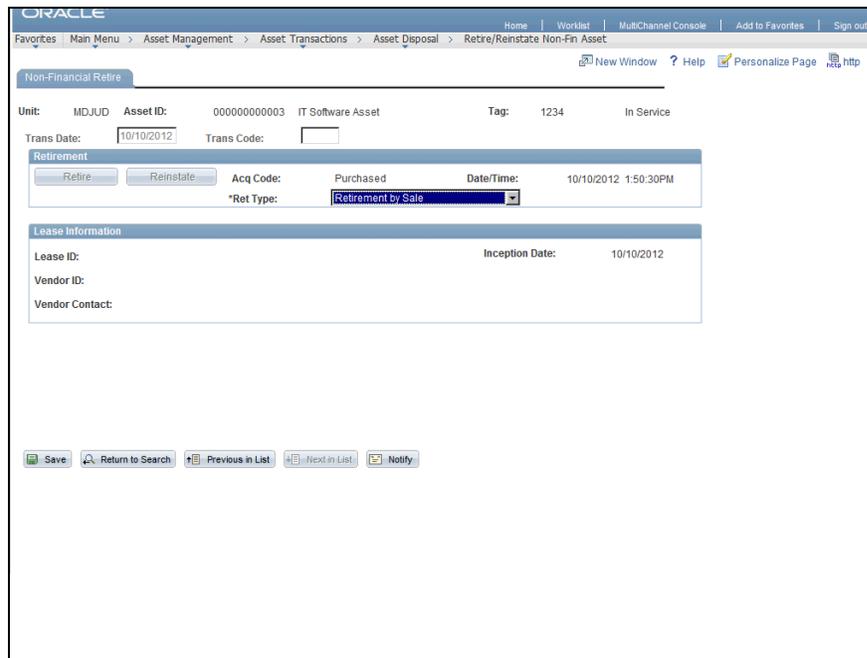
Lease ID: Inception Date: 10/10/2012

Vendor ID:

Vendor Contact:

Save Return to Search Previous in List Next in List Notify

Step	Action
8.	<p>Because this asset was already retired, the Reinstate button is now active.</p> <p>Click the Reinstate button.</p> 
9.	<p>Click the Save button.</p> 



Step	Action
10.	Notice that the system updated the asset status/tag to 'In Service' .
11.	You have successfully completed <i>Reinstating an Asset</i> . You have learned how to: - Reinstate an asset End of Procedure.

Lesson 6: Reviewing Asset Information

Lesson Overview

You may need to obtain information regarding assets that you have added into the system. The following lesson teaches you how and where you can find important information about these assets.

Lesson Objectives

After completing this lesson you will be able to:

- Review basic asset information

6.1 Reviewing Asset Information

You can review basic asset information in the **Basic Add** component. You can access the **Basic Add** pages through the **Search for an Asset** page or by navigating directly to the **Basic Add** component using the **Asset Basic Information** search page.

This topic teaches you how to access asset basic asset information by navigating directly to the **Asset Basic Information** search page. When searching for an asset in the **Basic Add** component, you can enter criteria to help narrow the results retrieved including:

- Business Unit (required)
- Asset Identification (ID)
- Tag Number
- Description
- Asset Type and Sub-Type

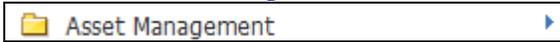
After completing this topic, you will be able to:

- Review and verify information for your software IT assets

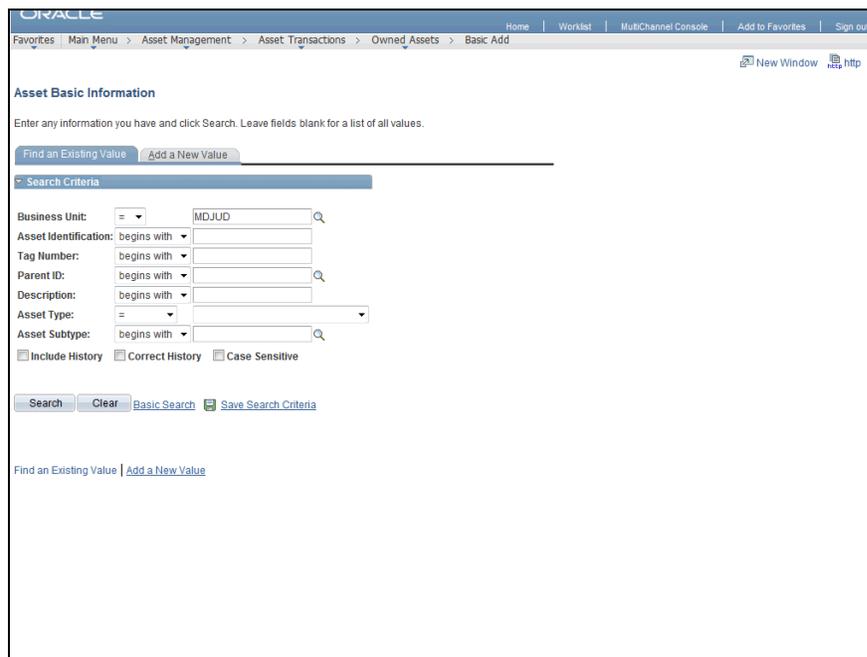
Procedure

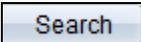
You need to review the status, acquisition details, cost and location information about an asset created through the Transaction Loader interface.

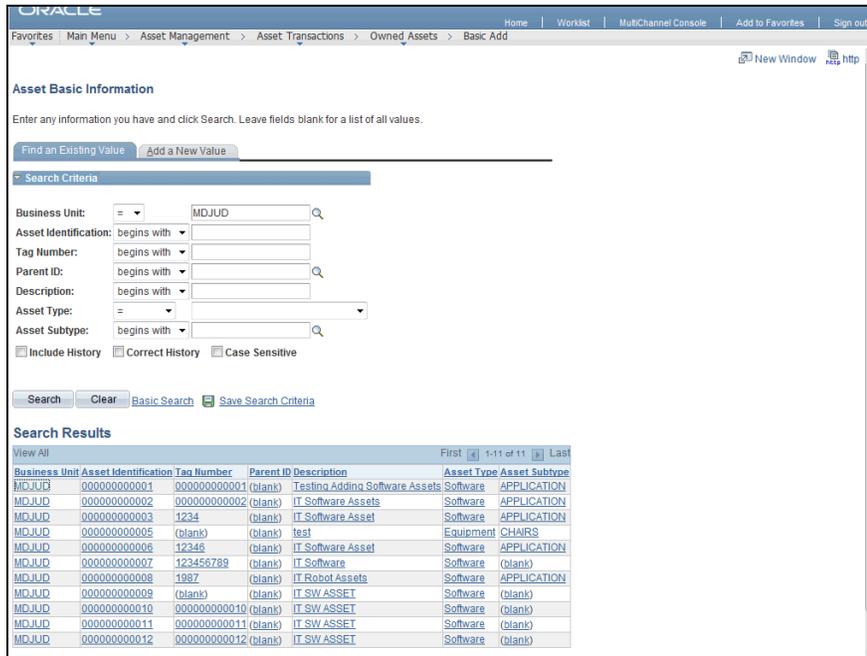
In this topic, you will access the **Asset Basic Information** search page and review asset information recorded/entered for an asset in the **Basic Add** component.

Step	Action
1.	Begin by navigating to the Asset Basic Information page. Click the Asset Management menu. 

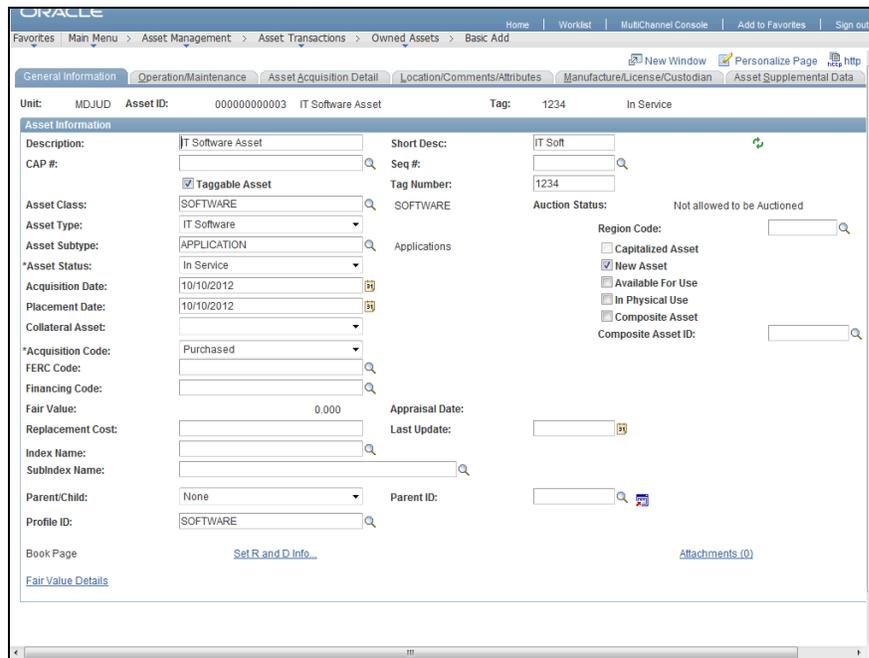
Step	Action
2.	Click the Asset Transactions menu. 
3.	Click the Owned Assets menu. 
4.	Click the Basic Add menu. 



Step	Action
5.	The Asset Basic Information search page displays. Enter search criteria to narrow the results retrieved including: <ul style="list-style-type: none"> - Business Unit (required) - Asset Identification (ID) - Tag Number - Description - Asset Type and Sub-Type <p>NOTE: Enter the Asset ID, if known.</p>
6.	Click the Search button. 



Step	Action
7.	<p>Assets matching the search criteria display in the search results grid.</p> <p>Click the asset link for the asset you want to review.</p> <p>NOTE: If your criteria retrieve only one asset, the system directs you to the Basic Add - General Information page.</p> <p>000000000003</p>

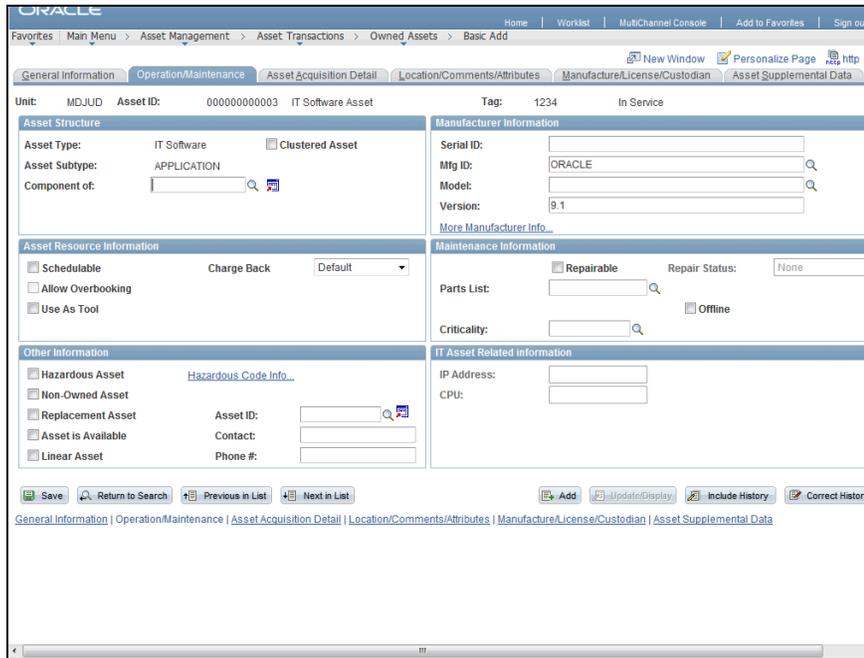


The screenshot shows the Oracle GEARS 'Basic Add' page for an IT Software Asset. The page is divided into several tabs: General Information, Operation/Maintenance, Asset Acquisition Detail, Location/Comments/Attributes, Manufacture/License/Custodian, and Asset Supplemental Data. The 'General Information' tab is active, displaying the following details:

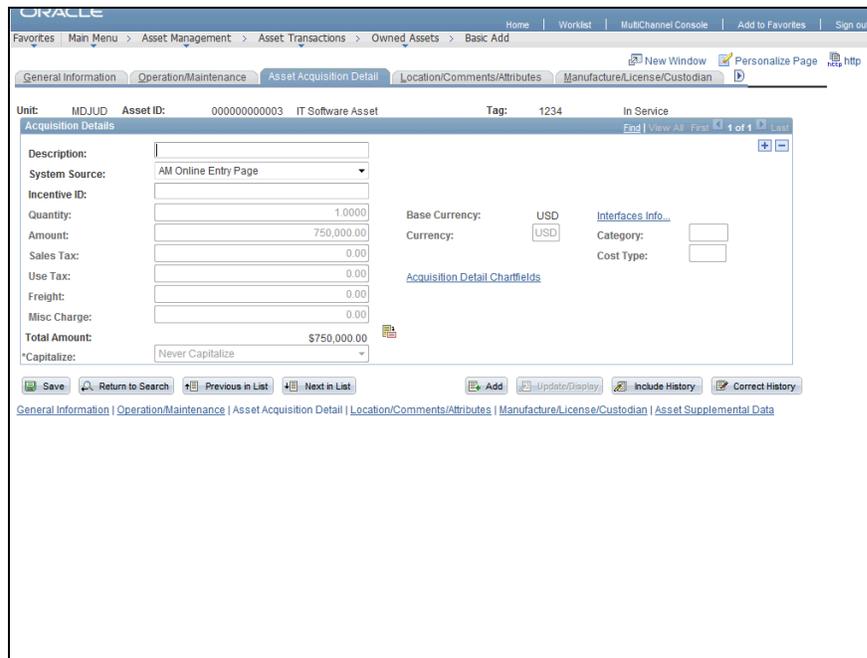
- Unit: MJUD, Asset ID: 00000000003, IT Software Asset, Tag: 1234, In Service
- Description: IT Software Asset, Short Desc: IT Soft
- CAP #: (empty), Seq #: (empty)
- Asset Class: SOFTWARE, Tag Number: 1234
- Asset Type: IT Software, Auction Status: Not allowed to be Auctioned
- Asset Subtype: APPLICATION, Applications: (empty)
- *Asset Status: In Service, Region Code: (empty)
- Acquisition Date: 10/10/2012, Placement Date: 10/10/2012
- *Acquisition Code: Purchased, Region Code: (empty)
- Fair Value: 0.000, Appraisal Date: (empty)
- Replacement Cost: (empty), Last Update: (empty)
- Index Name: (empty), Subindex Name: (empty)
- Parent/Child: None, Parent ID: (empty)
- Profile ID: SOFTWARE

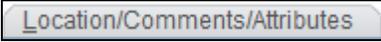
At the bottom of the page, there are links for 'Set R and D Info...', 'Attachments (0)', and 'Fair Value Details'.

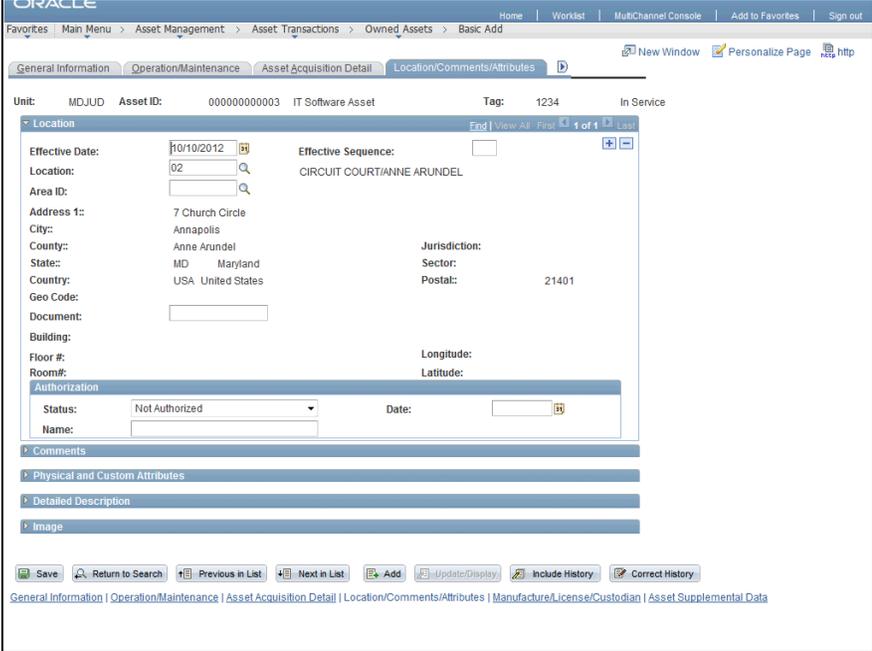
Step	Action
8.	The Basic Add - General Information page displays for the asset specified. On this page you can review details about the asset including the description, tag number, asset class/type/sub-type, asset status, and date of acquisition.
9.	The Asset Status field indicates if the asset is "In Service" (active) or "Disposed" (retired).
10.	Click the Operation/Maintenance tab. 



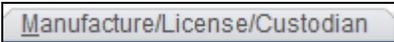
Step	Action
11.	<p>The Operation/Maintenance page displays.</p> <p>In the Manufacturer Information section, you can find the serial ID, manufacturer ID, model and version number for software. You can update these fields, if applicable.</p> <p>NOTE: More manufacturer information can be entered/viewed on the More Manufacturer Information page. Use the More Manufacturer Info... button to access this page.</p>
12.	<p>Click the Asset Acquisition Detail tab.</p> 

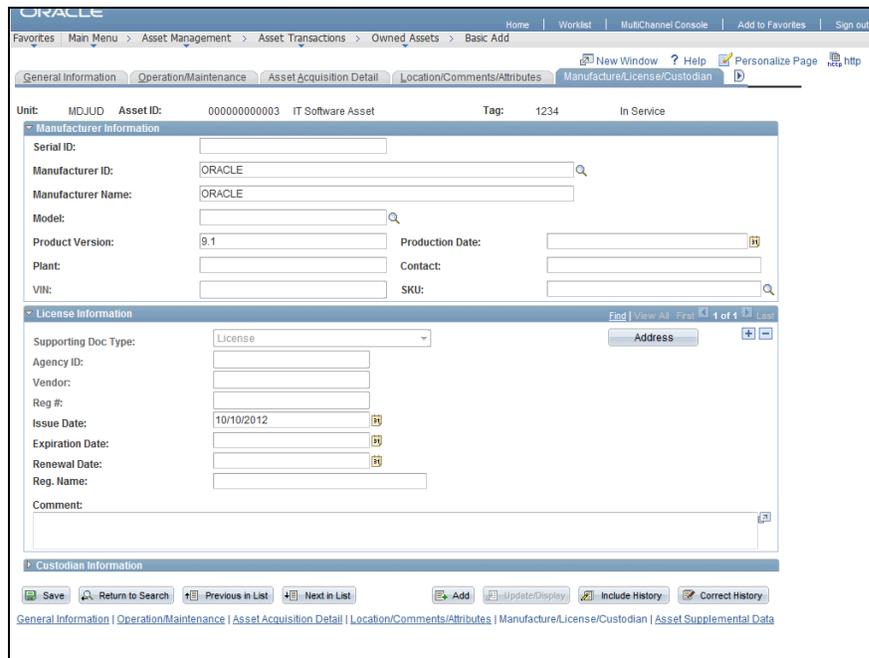


Step	Action
13.	<p>The Asset Acquisition Detail page displays.</p> <p>Use the Asset Acquisition Detail page to view how the asset was created. The System Source list identifies the source of the asset information.</p> <p>For example, the asset can be created manually through the Basic Add pages (AM Online Entry Page) or it could be created via the Transaction Loader from a PO Receipt in Purchasing (PO Online Entry Panel).</p>
14.	Other fields provide acquisition details, such as the Quantity and Amount fields.
15.	<p>Click the Location/Comments/Attributes tab.</p> 



The screenshot shows the Oracle GEARS web interface. The breadcrumb trail is: Favorites > Main Menu > Asset Management > Asset Transactions > Owned Assets > Basic Add. The active tab is 'Location/Comments/Attributes'. The asset details are: Unit: MDJUD, Asset ID: 00000000003, IT Software Asset, Tag: 1234, In Service. The 'Location' section is expanded, showing fields for Effective Date (10/10/2012), Location (02), Area ID, Address 1 (7 Church Circle), City (Annapolis), County (Anne Arundel), State (MD), Country (USA), Jurisdiction (CIRCUIT COURT/ANNE ARUNDEL), Sector, and Postal (21401). Below this is an 'Authorization' section with a Status dropdown (Not Authorized) and a Date field. At the bottom, there are navigation buttons: Save, Return to Search, Previous in List, Next in List, Add, Update/Display, Include History, and Correct History. A breadcrumb trail at the very bottom reads: General Information | Operation/Maintenance | Asset Acquisition Detail | Location/Comments/Attributes | Manufacture/License/Custodian | Asset Supplemental Data.

Step	Action
16.	Use the Location/Comments/Attributes page to enter location information, comments, and physical attributes for an asset.
17.	If changing locations, you may need to get Authorization or change the Authorization Status to "Authorized".
18.	Click the Show following tabs button. 
19.	Click the Manufacture/License/Custodian tab. 



Step	Action
20.	Use the Manufacture/License/Custodian page to enter custodial information, maintain license information, and keep track of information about and from the manufacturer.
21.	You have successfully completed <i>Reviewing Asset Information</i> . You have learned how to: - Review and verify information for IT software assets End of Procedure.

6.2 Printing an Asset

You may have a need to print asset information about an IT Software asset. The **Print an Asset** component allows you to print asset information for specified asset. You can access the **Print an Asset** component directly or use the **Search for an Asset** page (discussed in *Lesson 5: Managing Assets*) to search for and print a specific asset profile.

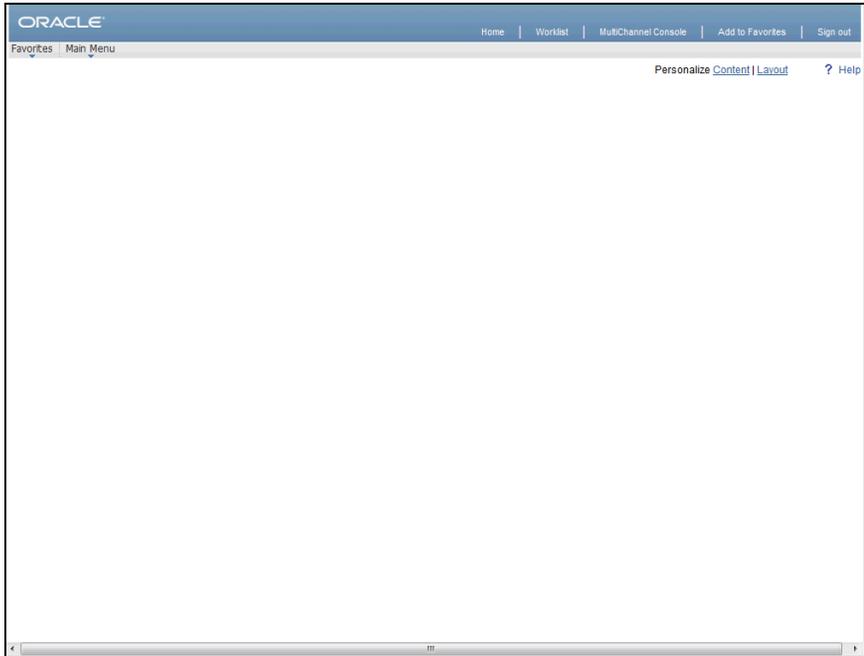
After completing this topic, you will be able to:

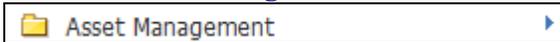
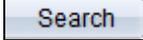
- Use the **Print an Asset** component to search for and print asset information for a specific asset

Procedure

In this topic, you will access the Print Asset component to print asset information for an asset.

NOTE: You can also use the **Search for an Asset** page to find an asset and print the associated asset information. Navigation: *Asset Management > Search for an Asset*



Step	Action
1.	Navigate to the Print Asset search page. Click the Main Menu button. 
2.	Click the Asset Management menu. 
3.	Click the Print an Asset menu. 
4.	The Print Asset Search page displays. To search for an asset you can enter the asset ID or tag number in the corresponding fields. Enter the asset ID, if known.
5.	Click the Search button. 
6.	Assets matching your search criteria display in the Search Results grid below. NOTE: If you enter a specific asset ID or unique tag number, the system directs you to the Printable View of Asset page for the asset specified. Click the asset ID link. 

Step	Action
7.	<p>The Printable View of Asset page displays.</p> <p>Review the asset information, as needed. Print the asset using your internet browser options.</p>
8.	<p>You have successfully completed the <i>Printing an Asset</i> topic.</p> <p>You have learned how to:</p> <ul style="list-style-type: none"> - Access the Print an Asset component and search for an asset - Print an asset using a printable view of basic asset information <p>End of Procedure.</p>

Course Summary



Congratulations!

You have successfully completed the *AM210 Managing Assets in GEARS* course. In this course, you have learned how to:

- Create an IT Software asset manually
- Create IT Software assets via the Transaction Loader Process
- Generate the AOC Magic Report
- Manage assets, including changing location and retiring/reinstating assets
- Search for and review asset information

We hope that you found this class informative, interactive, and fun. Check out other GEARS training courses, available on the GEARS website at <http://courtnet/gears/index.html> (<http://courtnet/gears/index.html>).

We are always looking for opportunities to improve our courses. If you have ideas on improving this course please share your feedback by sending us an email at gearstraining@mdcourts.gov (<mailto:gearstraining@mdcourts.gov>).