



Training Guide – Asset Management

Updating Locations and Custodians in Basic Add

State of Kansas

Applicable Role(s):

Agency Asset Processor

Agency Asset Maintainer

Created 2/1/2013

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Statewide Management, Accounting and Reporting Tool

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Updating Locations and Custodians in Basic Add

- SMART keeps an audit trail of past Location Codes and Custodians.
- To update a Location Code or Custodian, you must click the “+” button to add a new row. Then select the new Location Code or Custodian and Save. This allows you to keep track of where the asset was or who the custodian was at a specific time.
- New Location Codes can be created if you don’t find the one you need. Log a Service Desk ticket with the Description, Address, City, County, State, and Postal Code.
- New Area Id’s can be created if you don’t find the one you need. See the “Adding and Inactivating Area Id’s” job aid.
- In the event that a large number of assets need to be transferred from one custodian to another, log a Service Desk ticket including the Employee Name and Employee ID for both the old and new custodians. The same can be done for Location updates by providing the old and new Location Codes. Central can process a Mass Change to update all the assets with the new custodian and/or location. This should only be used for a large number of updates.
 - Example for Custodian: John Smart retired (K0000123456). Please transfer all assets to Liz Smart (K0000456789).
 - Example for Location: We are no longer housing assets at KT123. Please transfer them to KT456.
- If an employee retires or leaves an agency, nothing happens on the asset record until someone manually updates the Custodian. There is no “flag” in AM that the individual is no longer a valid custodian. Because the custodian field is maintained by the agency (not Central), there really is no formalized “acceptable timeframe” in which to make the change. But it is in the agency’s best interest to keep the custodian field as up-to-date as possible.

Update to:	Navigation
Location Code	Asset Management>Asset Transactions>Owned Assets>Basic Add>Location/Comments/Attributes tab
Custodian	Asset Management>Asset Transactions>Owned Assets>Basic Add>Manufacturer/License/Custodian tab

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Location/Comments/Attributes | Manufacture/License/Custodian | Asset Supplemental Data | Attachments

Unit: 17300 Asset ID: 000000000066 Halm Jet Press Tag: 14075 In Service

Location Find | View All First 1 of 1 Last

Effective Date: 06/30/2010 Effective Sequence:

Location: KTPRT State Printing Plant

Area ID:

Address: 201 NW MacVicar

City: Topeka

County: Shawnee

State: KS Kansas

Country: USA United States

Geocode:

Document:

Building:

Floor #:

Room#:

Jurisdiction:

Sector:

Postal: 66606-2499

Longitude:

Latitude:

Authorization

Status: Date:

Name:

Location/Comments/Attributes | Manufacture/License/Custodian | Asset Supplemental Data | Attachments

Unit: 17300 Asset ID: 000000000066 Halm Jet Press Tag: 14075 In Service

Manufacturer Information

License Information

Custodian Information Find | View All First 1 of 1 Last

Effective Date: 06/21/2010 Effective Sequence: 0 This Asset is Offsite

Custodian: Smart,Barry

EmplID: K000012345

Authorization

Status: Authorized Date:

Name:

Department:

Fund Code: 6167

Budget Unit:

Program Code:

Project:

Service Location:

Agency Use:

ChartField 2:

Always select the EmplID first and let the Custodian field auto-populate. You will only see EmplID's from employees in your agency.