

[Report of Survey for Trade-In in myAssets]

Use this instruction guide to process a Report of Survey for Trade-In in myAssets. Only Property Custodians, Alternate Custodians, Contacts or Alternate Contacts for your department may use UF's new online property management system, **myAssets**, at **https://myassets.fa.ufl.edu**

Submit this request when property is to be traded in towards the purchase of new property. Use the Report of Survey link and select "Trade-In" from the dropdown for "Reasons for Disposition." You may also use the My Assets link, select multiple affected assets and click the Create Report of Survey link to get to the same page.

The system will route your request to Asset Management, who will process the request and update myUFL with the new information.

- ▶ Log on to **https://myassets.fa.ufl.edu** using your GatorLink username and password
- ▶ In the Dept Asset Administration menu, in the Manage Assets section, click the Create a Report of Survey link
 - ▶ Enter the Tag number of the item to be traded in
 - ▶ Click the Add link to bring up the item's information
 - You can add another item this way if you are reporting more than one item
 - ▶ Click the dropdown in the Disposition column and select "Trade-In" as reason for disposition
 - The screen will change and provide an additional field for the PO or Purchase Order number of the new asset being purchased as part of the trade-in
 - Enter the PO number

Approvals are only processed online if items are not being transferred or were not lost, stolen or improperly disposed of.
Lost, stolen, improperly disposed of or transferred assets must be signed by the Property Custodian as well as a Department Chair, Dean, etc.

UNIVERSITY OF FLORIDA REPORT OF SURVEY					
Contact:	Preisler, Marianne W	Title:	Coordinator 2, Human Resource Services		
Dept:	HR-TRAINING-DEVELOPMENT	Phone:	273-1769		
Custodian:	Ellis, Larry T	Title:	DIR HUM RES 6		
Dept:		Phone:	392-1075		

TAG: **ADD**

If items are under 5 years old an explanation is required. Click on the to enter an explanation.

TAG	DESCRIPTION	SERIAL #	ACQ DATE	ACQ COST	PROJECT	DISPOSITION	NOTE	EXPLAIN	REMOVE
00000203215	COMPUTER, DELL OPTIPLEX GX270	8NLG351	22-JUN-04	\$ 1,397.91		Trade-In	PO#: 0000001654		

Has software/data on all electronic devices/media above been properly destroyed? Yes No NA

Is the equipment covered by the Equipment Maintenance Insurance Program? Yes No

I hereby certify that the above is a true and complete statement of reasons for the above request.

CREATE REPORT OF SURVEY

- ▶ Next, please answer the question at the bottom regarding whether or not software and sensitive data were destroyed on the asset if it contained such
 - Please answer Yes or No or N/A in cases where that was impossible
- ▶ Also, answer the next question regarding whether or not the asset was on the Equipment Maintenance Insurance program
 - If the answer is yes, notify Asset Management with the decal number so files can be updated

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- ▶ Finally, check the box at the bottom to certify that all the statements on this form are true and correct
- ▶ Click the link at the bottom Create Report of Survey, to submit
 - Asset Management will receive a notification that a survey is being forwarded for processing
- ▶ Workflow within your department is initiated
 - The Property Custodian received an e-mail stating a form has been submitted
 - He or she approves the Survey on line (does not sign hard copy) generated by myAssets and e-mailed to the person who submitted the request
 - The form returns electronically to the contact and they print a copy of the approved survey and have it signed by a witness (most cases will be the Dept Contact)
 - Also, the purchase order number must be included on the survey form
 - If possible, attach any decals for this asset to the form for Traded-in – if decal(s) are not available, attach an explanation as to why
 - The contact can then mail or fax the form to Asset Management at 392-0081
- ▶ Track the status of your request in the My Requests link in the Tools section
 - ▶ Click Reports of Survey Requests
 - ▶ Refer to the instruction guide, "Tracking Your Requests in myAssets" for more instructions
- ▶ Upon receipt of the request, Asset Management
 - ▶ Begins to process the request when receives signed printout of .pdf form and any attachment
 - ▶ Verifies data submitted
 - ▶ Approves request when form is received
 - ▶ Updates myUFL
 - ▶ When the request is complete, an e-mail will automatically be sent to the Department Contact to notify that it is completed

For further assistance contact the University Asset Management Office at 392-2556.