Asset Change Requests

KUDOS

Systems Manager & Developer
Kimberly Salisbury, Financial Systems Manager, Business Processes
Creg Empey, Enterprise Developer 2, ITS -- Enterprise Applications

Unit Property Administrators
Charles Zillinger, Director, Facilities - LES, Facilities Management
Pamela Hilliard, Finance/Business Director, Facilities Management
Deborah Foster, Financial Specialist, NIATT (National Institute for Advanced Transportation
Tracy Brown, Financial Technician, Aquaculture Research Institute, Hagerman, ID.
Nicole Thompson, Administrative Assistant II, Plant, Soil and Entomological Sciences/PSES
Carol Lass, Financial Technician, College of Agricultural and Life Sciences
Heather Flynn, Administrative Assistant 2, ITS -- Information Technology Services
Theresa Albright, Budget Specialist, Kimberly Research & Extension Center
Susan Kelly, Administrative Assistant, Kimberly Research & Extension Center

Office of Sponsored Programs
Heather Nelson, Financial Specialist, Office of Sponsored Programs

Surplus
Gerald (Jerry) Martin, RSSW Supervisor, Facilities Management
For the purpose of this presentation I am wearing (in most cases) all the players hats. By doing so I can snapshot and present all the screens and how they would appear with each approving (or disapproving) person(s).

Asset Accounting

Purpose

The University of Idaho has a significant investment in fixed assets, such as land, buildings, other improvements, and fixed and moveable equipment which are used to accomplish the primary missions of instruction, research and public service.

Our mission is to ensure that University fixed assets are properly recorded to inventory, safeguarded, controlled, disposed of, and accounted for in accordance with federal and state regulations, audit requirements, and generally accepted accounting principles. We accomplish our mission by providing customer service oriented asset management tools and services.
University of Idaho VandalWeb

User Login

Enter your University of Idaho NetID and password.

Need assistance with your NetID? You may change your password by visiting the Account Management page. Once logged in select the "Change Passwords" menu item.

VandalWeb will be out of service starting at 5:30PM each Friday evening for regular maintenance activities. Outage length will vary depending on the specific activities.

NetID:  
Password:  

Login  Click Here for Help with Login?

RELEASE: 8.5.2

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Welcome, Joseph E. Groves, to the University of Idaho VandalWeb System! Last web access on Dec 04, 2014 at 03:54 pm

Student Account Information
Student Information / Registration Menu
Register, Apply for Degree, View your Transcript and Financial Aid, Obtain your Enrollment Verification
Student Financial Aid & Scholarships
Student Housing Information
University Housing Options
Employee Information
Personal Information / Address Menu
Financial Information Menu
Query Budget & Encumbrance data; Approve Financial Documents; View financial document details or their approval history.
Finance Query for Non-Banner Users
Budget Query, Encumbrance Query, View Document and Budget Availability
Office of Sponsored Programs
PAR Reports; Monthly PI Reports; Expense Justification Tool
Vandal Alert
University of Idaho Emergency Notification System
Argos Reporting
Argos Data Dictionary (datablocks, common names & reports)
Vandal Card Menu
Access your Vandal Card account, deactivate a lost card, upload your photo.

RELEASE: 8.0

© 2014 Ellucian Company L.P. and its affiliates.
List of Direct Reports (For Supervisors Only)
Show a list of your direct reports. Supervisor use only.

Vandal Card Menu
Access your Vandal Card account, deactivate a lost card, upload your photo.

Financial Tasks

Finance Self Service for Non-Banner Users
Connect to Finance Self-Service for non-Banner users.

Pending Travel/Purchasing card claims
View status of Travel Web trips or Purchasing card claims that you are listed as the traveler or cardholder

Purchasing Card Statements
Manage departmental purchasing cards and purchasing card expenses.

Journal Document Imaging
Upload additional documentation to be loaded to Document Imaging

Purchasing Service Contract Entry
Purchasing Service Contract Entry

Purchasing Service Contract Approvals
Purchasing Service Contract Approvals

Asset Change Requests
Entry into the Fixed Asset Change Request system.

UI Administrative Tasks

Supervisor Set Up Form
Assign supervisors to employees.

Campus Directory – Departmental
Department representatives can view or modify their department's campus directory listing.
Asset Change Requests

University of Idaho

Asset Identifying Information
- Permanent Tag #121484
- Origination Tag #T00018796
- System Status: Converted from OLD system
- Cap Ind: N
- Book Value: $3000

Current Descriptive Information
- Asset Description: AUTOCLAVE
- Make: CASTLE
- Model: 3020
- Manufacturer: CASTLE
- Serial Number/VIN

Current Status Information
- User Status: Active
- Condition: Fair
- Responsible Orgn: BIX017 Plant, Soil & Entomological Science
- Location: AY335 Ag Science Bldg-Room 355
- Custodian ID: V00290895 Briones, Aurelio M.
- Equip Mgr Id

Update Descriptive Information
Update Status Information/Transfer Asset

Directions and Maps | Contact Us | Policies and Copyrights | Accessibility | Diversity | Give to the University of Idaho

Firefox automatically sends some data to Mozilla so that we can improve your experience.
Changing or Adding a Serial Number

University of Idaho

New Request

Permanent Tag #: 121404

Requests Pending Your Approval

<table>
<thead>
<tr>
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<tr>
<td>402603</td>
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Changing or Adding a Serial Number
Changing or Adding a Serial Number

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<tr>
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<td>System Status: Converted from OLD system</td>
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<th>Current Descriptive Information</th>
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<tr>
<td>Asset Description</td>
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<tr>
<td>Make</td>
<td>Make CASTLE</td>
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<tr>
<td>Model</td>
<td>Model 3020</td>
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<tr>
<td>Manufacturer</td>
<td>Manufacturer CASTLE</td>
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<td>Serial Number/VIN</td>
<td>Serial #/VIN Asset Accounting is COOL!</td>
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[Discard Request] [Save and Edit] [Finish and Submit]
### Changing or Adding a Serial Number

**New Request**

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Changing or Adding a Serial Number
Changing or Adding a Serial Number

- Permanent Tag #
- Request approved.
- New Request
- Permanent Tag # Originator State Last Activity
  - 402845 Groves, Joseph E. Pending Surplus Approval 05-Dec-2014
  - 121484 Groves, Joseph E. Pending Property Management Office Approval 05-Dec-2014
- Requests You Have Submitted
  - Permanent Tag # Originator State Last Activity
    - 402845 Groves, Joseph E. Pending Surplus Approval 05-Dec-2014
    - 402603 Groves, Joseph E. Completed 04-Dec-2014
    - 121484 Groves, Joseph E. Pending Property Management Office Approval 05-Dec-2014
Changing or Adding a Serial Number

University of Idaho

Messages
Request approved.

New Request

Permanent Tag #

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Changing or Adding a Serial Number
Location and Custodian Change Request

New Request

Permanent Tag #: 198968

Requests Pending Your Approval

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Location and Custodian Change Request
# Location and Custodian Change Request

![Image of UI Asset Accounting webpage](https://vandalweb.uidaho.edu/PROD/fin_asset_change_user.update_status_info)

## Asset Identifying Information
- **Permanent Tag**: #196968
- **Origination Tag**: #T00094625
- **System Status**: Non Banner Procured Assets
- **Cap Ind**: N
- **Book Value**: $2040

## Current Status Information
- **User Status**: Active
- **Condition**: Excellent

## New Status Information
- **User Status**: Active
- **Condition**: Excellent

### Responsible Orgn
- **Responsible Orgn**: BJX017 Plant, Soil & Entomological Science

### Location
- **Location**: AY242 Ag Science Bldg-Room 242

### Custodian ID
- **Custodian ID**: V00515153 Thompson, Nicole M.

### Equip Mgr ID
- **Equip Mgr ID**: V00515153 Thompson, Nicole M.

### Disposal Requested?
- **Reason for Change**: Change Location/Custodian ID.
- **No**

### Final Steps
- **Finish and Submit**
- **Save and Exit**
- **Discard Request**
## Location and Custodian Change Request

![Image of UI Asset Accounting screenshot]

**New Request**

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Location and Custodian Change Request

Permanent Tag #: 195958

Field | Current Information | New Information
--- | --- | ---
Responsible Locn | AY242 Ag Science Bldg-Room 242 | AY317 Ag Science Bldg-Room 317
Custodian ID | V00515153 Thompson, Nicole M. | V00067132 Prather, Timothy S.
Reason for Change | Change Location/Custodian ID. | 

Approval from: Approved by: Date
Originator: V00011059 Groves, Joseph E. 05-DEC-14

Approve this Request:
- Approve
- Disapprove

 Reason for Disapproval:

Submit Query

DIRECTIONS AND MAPS | CONTACT US | POLICIES AND COPYRIGHTS | ACCESSIBILITY | DIVERSITY | GIVE TO THE UNIVERSITY OF IDAHO
Location and Custodian Change Request

University of Idaho

Messages
Request approved.

New Request

Permanent Tag #
Go

Requests Pending Your Approval

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<td>197113</td>
<td>Hilliard, Pamela D.</td>
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## Location and Custodian Change Request

![Image of UI Asset Accounting webpage]

### Messages

Request approved.

### New Request

#### Permanent Tag #

- **Go**

### Requests Pending Your Approval

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Location and Custodian Change Request

Asset Tag: 196968
Action: Permanent Tag - Update Asset

Origination Tag: TO004623
Permanent Tag: 196968 COMPUTER

Vendor: 
Purchase Order: 
Receiver: 
Purchase Item: 
Receiver Date: 24-JUN-2014
Invoice: 
Invoice Date: 
Cancel Date: 
Invoice Item: 
Instalments: 
Recurring: 

Other Source Data
Document: 
Type: 
Sequence: 
Document Tag Date: 
Submission Number: 

Transfer Data
Date: 05-DEC-2014
COA: 9 University of Idaho COA
Organization: BJX017 Plant, Soil & Entomological Science
Location: AY317 Ag Science Bldg-Room 317
Grant: 
Custodian ID: V00037132 Prather, Timothy S.
Equipment Manager: 

Enter responsible COA.
Transferring an Asset to Surplus
Transferring an Asset to Surplus
## Transferring an Asset to Surplus

### Asset Identifying Information

- **Permanent Tag**: #402503
- **Origination Tag**: #T00082502
- **Description**: AIR/FUEL ANALYZER (STECIAK/BEYERLEIN)

### Current Status Information

- **User Status**: Active
- **Condition**: Poor
- **Responsible Orgn**: KLY100
- **Location**: OM023 Vehicle Research Lab - Room 023
- **Custodian ID**: V00524530
- **Equip Mgr ID**: 

### New Status Information

- **User Status**: Active
- **Condition**: Poor
- **Responsible Orgn**: KLY100
- **Location**: OM023 Vehicle Research Lab - Room 023
- **Custodian ID**: V00524530
- **Equip Mgr ID**: 

**Reason for Change**

- **Disposal Requested**: No

**Options**

- Discard Request
- Save and Exit
- Finish and Submit
Transferring an Asset to Surplus

Asset Identifying Information
Permanent Tag: #0402603, Origination Tag: T00082502
Description: AIR/FUEL ANALYZER (STEICIAK/BEYERLEIN)
System Status: Invoiced, Cap Ind: N, Grant: KLK351, Book Value: $3950

Current Status Information
User Status: Active, Condition: Poor
Responsible Orgn: KLY100 NIATT Support, Location: OM023 Vehicle Research Lab - Room 0023
Custodian ID: V00524530 Cordon, Daniel A.
Equip Mgr ID: 

New Status Information
User Status: Surplus
Condition: Poor
Responsible Orgn: RKY009 RSSW - UI Income, Location: PC101 Campus Services-Rm 101-Surplus Prop
Custodian ID: V00524530 Cordon, Daniel A.
Equip Mgr ID:
Disposal Requested?: No
Reason for Change: Spt#003776

Options: Discard Request, Save and Exit, Finish and Submit
## Transferring an Asset to Surplus

### Asset Identifying Information

Permanent Tag #402603  Origination Tag #T00062502  System Status: Invoiced  Cap Ind: N  Grant: KLK351  Book Value: $3950

**Description:** AIR/FUEL ANALYZER (STECIAK/BEYERLEIN)

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### Approval Information

**Approval from**
- Originator: V00011059 Groves, Joseph E. 04-DEC-14
- Unit Property Administrator: V00541730 Foster, Deborah C. 04-DEC-14

**Approved by**
- V00011059 Groves, Joseph E. 04-DEC-14

**Date**
- 04-DEC-14

### Approve this Request:
- Approve
- Disapprove
- Reason for Disapproval:  

Submit Query
Transferring an Asset to Surplus
### Transferring an Asset to Surplus

#### Asset Identifying Information
- **Permanent Tag #:** 402503
- **Origination Tag #:** T00082502
- **Description:** AIR/FUEL ANALYZER (STECIAK/BEYERLEIN)
- **System Status:** Invoiced
- **Cap Ind:** N
- **Grant:** KLK351
- **Book Value:** $3950

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#### Approval
- **Approved by:** V00011059 Groves, Joseph E. 04-DEC-14
- **Unit Property Administrator:** V00541730 Foster, Deborah C. 04-DEC-14
- **Surplus:** V00006485 Martin, Gerard J. 04-DEC-14
- **Property Management Office:** V00011059 Groves, Joseph E. 04-DEC-14
Banner Fixed Asset Record (After Approval)
Disposal Requested (Trade-Ins; Vendor /Lender returns; Scrapped w/surplus approval)
**Disposal Requested** (Trade-Ins; Vendor /Lender returns; Scrapped w/surplus approval)
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</table>

Approval from Approved by: V00011059 Groves, Joseph E. 05-DEC-14

Submit Query
Disposal Requested (Trade-Ins; Vendor /Lender returns; Scrapped w/surplus approval)
Disposal Requested (Trade-Ins; Vendor /Lender returns; Scrapped w/surplus approval)

- Asset Accounting (Property Management Office) takes **additional necessary** steps when disposing assets in the Banner Fixed Assets module.

- When we ‘Approve” the Asset Change Requests for disposal, the asset is NOT automatically disposed in Banner Fixed Assets.

- The request serves as an audit trail if future inquiry is required.
Transfer to another Department/Unit
Transfer to another Department/Unit
Transfer to another Department/Unit

![Image of University of Idaho asset management system interface]

<table>
<thead>
<tr>
<th>Asset Identifying Information</th>
<th>New Status Information</th>
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<tbody>
<tr>
<td>Permanent Tag: #196620</td>
<td>User Status: Active</td>
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<tr>
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<td>Condition: Excellent</td>
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<tr>
<td>Description: WALK BEHIND TRACTOR W/SICKLE BAR</td>
<td>Responsible Orgn: BJX017 Plant, Soil &amp; Entomological Science</td>
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<tr>
<td>System Status: Non Banner Procured Assets</td>
<td>Location: AY242 Ag Science Bldg-Room 242</td>
</tr>
<tr>
<td>Cap Ind: Y Book Value: $5317</td>
<td>Custodian ID:</td>
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</table>

**Current Status Information**
- User Status: Active
- Condition: Excellent
- Responsible Orgn: BJX017 Plant, Soil & Entomological Science
- Location: AY242 Ag Science Bldg-Room 242
- Custodian ID:
- Equip Mgr ID:
- Disposal Requested: No
- Reason for Change:
Transfer to another Department/Unit

University of Idaho

Asset Identifying Information

Permanent Tag #196620  Origination Tag #T00004052
Description: WALK BEHIND TRACTOR W/SICKLE BAR
System Status: Non Banner Procured Assets  Cap Ind: Y Book Value: $5317

Current Status Information

User Status: Active
Condition: Excellent
Responsible Orgn: BIX017 Plant, Soil & Entomological Science
Location: AY242 Ag Science Bldg-Room 242
Custodian ID: Equip Mgr ID:

New Status Information

User Status: Active
Condition: Excellent
Responsible Orgn: BNBP20 Parma R & E Center
Location: YR100 Parma Mint Distillery Bldg-Room 100
Custodian ID: Equip Mgr ID:
Disposal Requested? No
Reason for Change: Transfer to Parma/Mint Bldg 491, 12/8/2014

Discard Request  Save and Exit  Finish and Submit

DIRECTIONS AND MAPS | CONTACT US | POLICIES AND COPYRIGHTS | ACCESSIBILITY | DIVERSITY | GIVE TO THE UNIVERSITY OF IDAHO
Transfer to another Department/Unit
Transfer to another Department/Unit

![Image of a webpage showing asset transfer details.](https://vandalweb.uidaho.edu/PROD/ui_fin_asset_change_user/process_approval)

**Messages**

Request approved.

**New Request**

**Requests Pending Your Approval**

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Transfer to another Department/Unit

![Image of University of Idaho website with a request approved and pending requests]

Messages
Request approved.

New Request
Permanent Tag #
Requests Pending Your Approval

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Transfer to another Department/Unit

![Image of a software interface for transferring assets to another department/unit](image-url)

**Asset Tag:** 196620
- **Action:** Permanent Tag - Update Asset

**Procurement Information:**
- **Origination Tag:** T00094052
- **Permanent Tag:** 196620 WALK BEHIND TRACTOR W/SICKLE BAR
- **Vendor:**
- **Purchase Order:**
- **Receiver:**
- **Purchase Item:**
- **Invoice:**
- **Invoice Item:**
- **Invoice Date:** 17-SEP-2013
- **Receiver Date:**
- **Cancel Date:**
- **Submission Number:**
- **Credit Memo:**
- **Installs:**
- **Recurring:**

**Other Source Data**
- **Document:**
- **Type:**
- **Sequence:**
- **Document Tag Date:**
- **Submission Number:**

**Transfer Data**
- **Date:** 09-DEC-2014
- **COA:** University of Idaho COA
- **Organization:** BNPBP20 Parma R & E Center
- **Location:** YR100 Parma Mint Distillery Bldg-Room 100
- **Grant:**
- **Custodian ID:**
- **Equipment Manager:**

**Enter responsible COA.**
Record: 1/1 <OSC>
### Messages
Request approved.

#### New Request
Permanent Tag # 403155

#### Requests Pending Your Approval

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## OSP - Request Transfer/Disposal - Grant Funded Equipment

### University of Idaho

**Asset Identifying Information**

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<tr>
<th>Description</th>
<th>Permanent Tag #403155</th>
<th>Origination Tag #T00084488</th>
<th>System Status: Invoiced</th>
<th>Cap Ind: Y</th>
<th>Grant: IBK819</th>
<th>Book Value: $10800</th>
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<td>LITTON SYSTEMS INC</td>
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<td></td>
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<tr>
<td>Model</td>
<td>.6 WATT STIRLING LINEAR</td>
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<td>Serial Number/VIN</td>
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**Current Descriptive Information**

- **Asset Description**: COOLER (VON WALDEN)
- **Make**: LITTON SYSTEMS INC
- **Model**: .6 WATT STIRLING LINEAR
- **Manufacturer**: LITTON SYSTEMS INC
- **Serial Number/VIN**: 306018

**Current Status Information**

- **User Status**: Active
- **Condition**: Excellent
- **Responsible Orgn**: IBX002 Geography
- **Location**: ZZ106 Greenland Summit Station-Greenland
- **Custodian ID**: V00749348 Walden, Von P.
- **Equip Mgr ID**:  

### Update Descriptive Information

### Update Status Information/Transfer Asset
OSP - Request Transfer/Disposal - Grant Funded Equipment
### New Request

**Permanent Tag #**

- 402845
- 403155

#### Requests Pending Your Approval

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OSP - Request Transfer/Disposal - Grant Funded Equipment

University of Idaho

Asset Identifying Information

Permanent Tag #403155
Origination Tag #T00084488
Description: COOLER (VON WALDEN)
System Status: Invoiced
Cap Ind: Y
Grant: IBK819
Book Value: $10800

<table>
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<tr>
<th>Field</th>
<th>Current Information</th>
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<tbody>
<tr>
<td>Disposal Requested</td>
<td>Y</td>
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<tr>
<td>Reason for Change</td>
<td>Transferred with Von Walden to WSU.</td>
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</table>

Approve this Request:
- Approve
- Disapprove

Reason for Disapproval:

Approval from Approved by         Date
Originator: V00011059 Groves, Joseph E. 09-DEC-14

Submit Query
## OSP - Request Transfer/Disposal - Grant Funded Equipment

### New Request

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*Source: University of Idaho*
### University of Idaho

#### Messages
- Request approved.

**New Request**

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**OSP - Request Transfer/Disposal - Grant Funded Equipment**

![Image of a webpage showing the process for requesting the transfer or disposal of equipment funded by a grant.](https://vandalweb.uidaho.edu/PROD/ui_fin_asset_change_user.view_request?id=107)

### University of Idaho

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**Description:** COOLER (VON WALDEN)

### Field | Current Information | New Information
---|---------------------|-------------------
Disposal Requested | Y | Transferred with Von Walden to WSU.

### Approval from
- **Originator**: V00011059 Groves, Joseph E. 09-DEC-14
- **Unit Property Administrator**: V00011059 Groves, Joseph E. 09-DEC-14
- **Office of Sponsored Programs**: V00011059 Groves, Joseph E. 09-DEC-14
- **Property Management Office**: V00011059 Groves, Joseph E. 09-DEC-14
Property management will take additional appropriate action to transfer/dispose this particular Grant Funded Capital Asset.
Asset Change Requests

• Improvement suggestions are always welcome and encouraged.

• Please submit suggestions/comments to:

  inventory@uidaho.edu
  assetactg@uidaho.edu
  885-4070 Joe Groves
  885-6043 Benjamin Woodward