

AM.020.030 – COPYING AN ASSET

Purpose	To copy Asset in AM Module.
Description	Asset Management enables users to copy the information of an existing asset. Copying an asset saves time if the existing asset's financial and physical information is similar to an asset that needs to be created. After copying an asset, the application assigns a different Asset ID to the new asset automatically. Users can choose which aspects of an asset to copy.
Security Role	BOR_AM_MAINTENANCE
Dependencies/ Constraints	Prior to copying an asset, verify the asset being copied has the same Profile ID as the asset that needs to be created. Never copy an SVP asset from an asset to depreciate and vice versa.
Additional Information	None

Procedure

Below are step by step instructions on how to copy an asset.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Asset Management link.
4.	Click the Asset Transactions link.
5.	Click the Owned Assets link.
6.	Click the Copy Existing Asset link.
7.	Enter the Asset ID of the Asset to copy from in the Asset Identification field.
8.	Click Search .
9.	Enter the number of assets to create in the Num of Asset Copies to create .
10.	Enter date in the Trans Date field. <i>Note: The Trans Date defaults to current date. The date entered here will default to the acquisition date and placement date on the Asset Information page. If users do not want the dates to be the same, navigate back to the Asset Information page and change these dates before saving.</i>
11.	Enter date in the Acctg Date field. This date should be in a current open period.
12.	Select any information to copy from the previous asset to the new asset. <i>Note: any information copied over from the source asset can be edited.</i>
13.	Click the Create Assets button. <i>Note: Complete steps 12-15 for each asset copied.</i>
14.	Enter asset description in the Description field.
15.	If the asset is taggable, check the Taggable Asset checkbox and enter in the Tag Number.
16.	Enter the asset's serial number in the Serial ID field.
17.	Click the ChartFields tab and check the Chartstrings to see if changes need to be made to the ChartFields.
18.	Make the same changes to the ENTERPRISE book that were made to the ALLASSETS book.
19.	Click the Save button.