



## Miami-Dade County

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INFORMS: Asset Management—Submit The Disposal Worksheet

**Version 1.0**

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## PURPOSE AND DESCRIPTION

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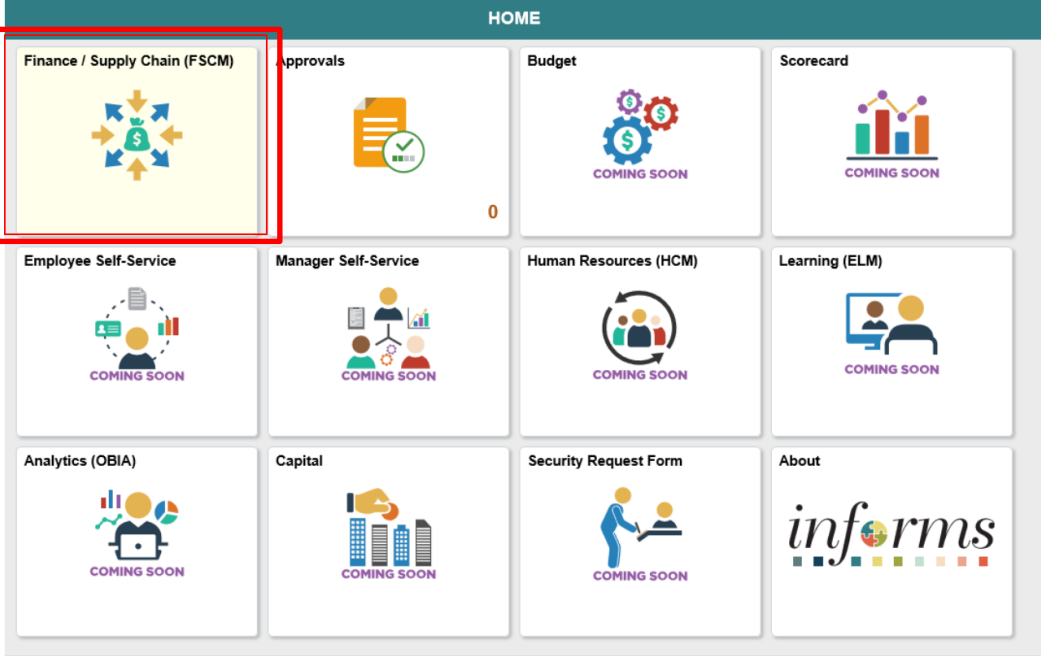

### **Purpose**

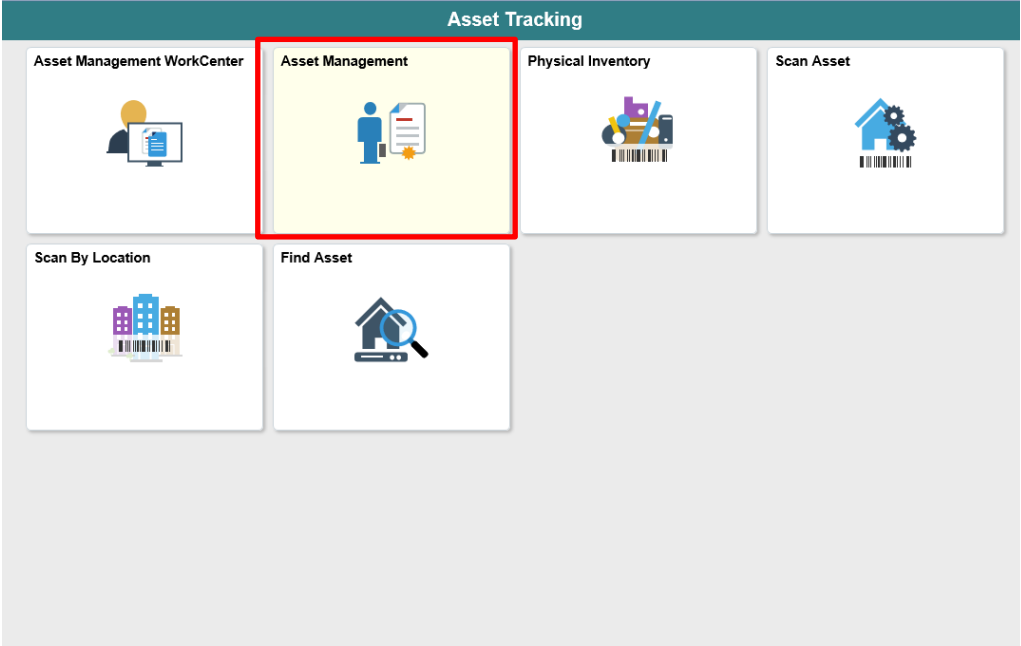
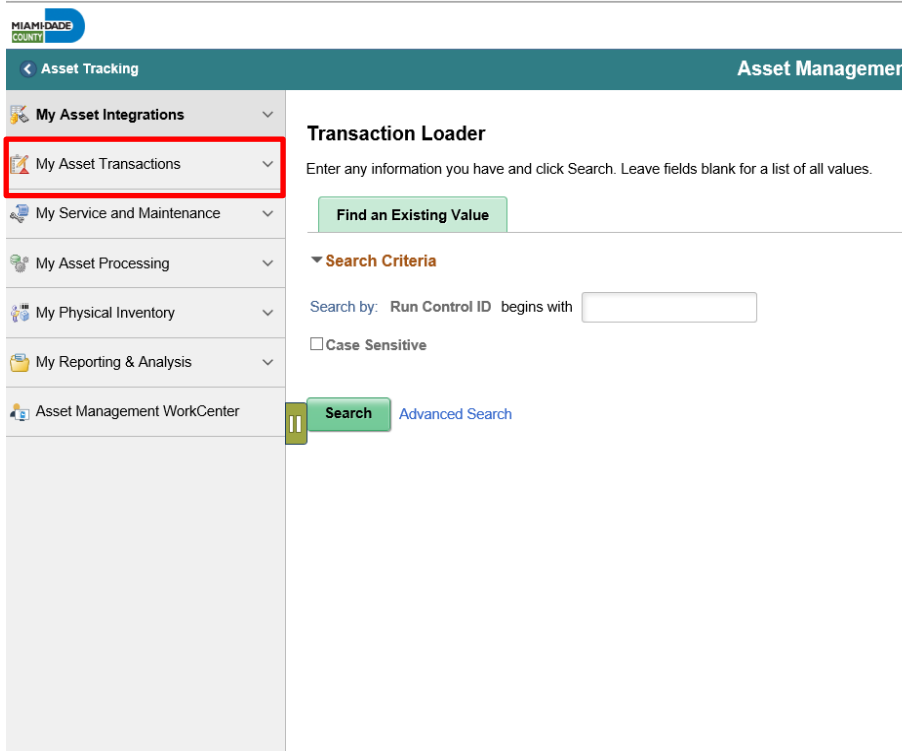
This document explains the process involved in submitting the disposal worksheet.

### **Description**

The Disposal Worksheet page provides numerous selection options to retrieve assets for retirement. Assets that are available for retrieval are determined by asset ownership and user ID.

## ACTIVITY 1: SUBMIT THE DISPOSAL WORKSHEET

Step	Action
1.	<p>Select the <b>Finance / Supply Chain (FSCM)</b> button.</p> 
2.	<p>Select the <b>Asset Tracking</b> button.</p> 

<p>3.</p>	<p>Select the <b>Asset Management</b> button.</p>  <p>The screenshot shows the 'Asset Tracking' dashboard with several buttons: 'Asset Management WorkCenter', 'Asset Management' (highlighted with a red box), 'Physical Inventory', 'Scan Asset', 'Scan By Location', and 'Find Asset'.</p>
<p>4.</p>	<p>Select <b>My Asset Transactions</b>.</p>  <p>The screenshot shows the 'Asset Management' interface. On the left, there is a sidebar with a list of options: 'My Asset Integrations', 'My Asset Transactions' (highlighted with a red box), 'My Service and Maintenance', 'My Asset Processing', 'My Physical Inventory', 'My Reporting &amp; Analysis', and 'Asset Management WorkCenter'. On the right, there is a 'Transaction Loader' section with a search bar and a 'Find an Existing Value' button.</p>

5.

Select **Asset Disposal Worksheet**.

The screenshot shows the 'Asset Management' interface. On the left sidebar, under 'My Asset Management Design', the 'Asset Disposal Worksheet' option is highlighted with a red rectangle. The main area displays 'Asset Management Definition' with a search bar and a 'Search Criteria' section. The 'Search Criteria' section includes a 'Business Unit' dropdown and an 'ID' input field. Below this, there are 'Search', 'Clear', and 'Basic Search' buttons, along with a 'Save Search Criteria' link. At the bottom of the sidebar, there are links for 'Find an Existing Value' and 'Add a New Value'.

6.

Confirm the **Business Unit**.

The screenshot shows the 'Disposal Worksheet' interface. The 'Asset Search Criteria' section is expanded, and the 'Unit' field is highlighted with a red rectangle. The 'Unit' field contains the value 'CH'. Other search criteria include 'Category', 'From Asset ID', 'Tag Number', 'Location', 'From In-Service Date', 'To In-Service Date', 'Book', 'Profile ID', 'To Asset ID', 'Serial ID', 'Area ID', 'Parent ID', 'FERC Code', 'Group ID', 'Asset Status', and 'Include Non Capitalized Assets'. Below the search criteria, there is an 'Acquisition Details' section with fields for 'PO Unit', 'Receipt Unit', 'AP Unit', 'PC Bus Unit', 'PO No.', 'Receipt No.', 'Voucher', and 'Project ID'. At the bottom, there are buttons for 'Retrieve', 'New Search', and 'View Ownership Details'.

7.

Select the **Retrieve** button.

The screenshot shows the 'Disposal Worksheet' search criteria section. It includes fields for Unit, Category, From Asset ID, Tag Number, Location, From In-Service Date, Book, Profile ID, To Asset ID, Serial ID, Area ID, To In-Service Date, Parent ID, FERC Code, Group ID, Asset Status, and Include Non Capitalized Assets. The 'Retrieve' button is highlighted with a red box.

8.

**Note:** Qualifying assets are listed in the Search Results grid. Select the checkbox in the Dispose column for those assets that you want to select to dispose.

Select the checkbox beside the assets you wish to dispose.

The screenshot shows the 'Search Results' section of the Disposal Worksheet. It includes a table with columns: Dispose, Asset ID, Description, Capitalized Asset, Asset Type, Tag Number, Category, and Serial ID. The 'Dispose' checkbox is highlighted with a red box.

Dispose	Asset ID	Description	Capitalized Asset	Asset Type	Tag Number	Category	Serial ID
<input checked="" type="checkbox"/>	1CA-00000607	COMPUTER EQUIPM	<input checked="" type="checkbox"/>	IT Hardware	828644	MCEQP	CNCCDB91SZ
<input type="checkbox"/>	1CA-00000609	COMPUTER EQUIPM	<input checked="" type="checkbox"/>	IT Hardware	847453	MCEQP	2UA4211FX2
<input type="checkbox"/>	1CA-00000610	COMPUTER EQUIPM	<input checked="" type="checkbox"/>	IT Hardware	828516	MCEQP	5CB31214MF
<input type="checkbox"/>	1CA-00000611	COMPUTER EQUIPM	<input checked="" type="checkbox"/>	IT Hardware	853636	MCEQP	SFTX1923AJ2A

9.

Select the **Retirement Information** tab.

**Note:** Verify the Quantity different than zero.

The **Retirement Information** tab displays the Retire Quantity, and any Proceeds or Removal Costs associated with each selected asset.

The screenshot shows the 'Asset Management' interface with the 'Disposal Worksheet' section. The 'Retirement Information' tab is highlighted with a red box. The table below displays asset details for disposal.

Dispose	Asset ID	Description	Cost	Currency	Quantity	Retire Quantity	Retirement Amount	Proceeds	Proceeds Currency	Remov
<input checked="" type="checkbox"/>	1CA-00000607	COMPUTER EQUIPM	1,290.00	USD	1.0000	1.0000	1,290.00		USD	
<input type="checkbox"/>	1CA-00000609	COMPUTER EQUIPM	1,157.88	USD	1.0000	1.0000	1,157.88		USD	
<input type="checkbox"/>	1CA-00000610	COMPUTER EQUIPM	1,396.76	USD	1.0000	1.0000	1,396.76		USD	
<input type="checkbox"/>	1CA-00000611	COMPUTER EQUIPM	4,025.00	USD	1.0000	1.0000	4,025.00		USD	

10.

Select the **Optional Accounting Information** tab.

The screenshot shows the 'Asset Management' interface with the 'Disposal Worksheet' section. The 'Optional Accounting Information' tab is highlighted with a red box. The table below displays asset details for disposal.

Dispose	Asset ID	Description	Accounting Date	Trans Code	Retirement Convention	Retirement Option
<input checked="" type="checkbox"/>	1CA-00000607	COMPUTER EQUIPM	04/02/2021		MDC Actual Month Depr Cnv-GASB	Calculate Gain/Loss
<input type="checkbox"/>	1CA-00000609	COMPUTER EQUIPM	04/02/2021		MDC Actual Month Depr Cnv-GASB	Calculate Gain/Loss
<input type="checkbox"/>	1CA-00000610	COMPUTER EQUIPM	04/02/2021		MDC Actual Month Depr Cnv-GASB	Calculate Gain/Loss
<input type="checkbox"/>	1CA-00000611	COMPUTER EQUIPM	04/02/2021		MDC Actual Month Depr Cnv-GASB	Calculate Gain/Loss
<input type="checkbox"/>	1CA-00000612	COMPUTER EQUIPM	04/02/2021		MDC Actual Month Depr Cnv-GASB	Calculate Gain/Loss

11.

Select the **Comments and Attachments** tab.

The screenshot shows the 'Asset Management' interface with the 'Disposal Worksheet' section. The 'Comments and Attachments' tab is highlighted with a red box. The table below lists assets for disposal.

Dispose	Asset ID	Description	Comments	Attachments
<input checked="" type="checkbox"/>	1CA-00000607	COMPUTER EQUIPM	<a href="#">Comments (0)</a>	<a href="#">Attachments (0)</a>
<input type="checkbox"/>	1CA-00000609	COMPUTER EQUIPM	<a href="#">Comments (0)</a>	<a href="#">Attachments (0)</a>
<input type="checkbox"/>	1CA-00000610	COMPUTER EQUIPM	<a href="#">Comments (0)</a>	<a href="#">Attachments (0)</a>
<input type="checkbox"/>	1CA-00000611	COMPUTER EQUIPM	<a href="#">Comments (0)</a>	<a href="#">Attachments (0)</a>
<input type="checkbox"/>	1CA-00000612	COMPUTER EQUIPM	<a href="#">Comments (0)</a>	<a href="#">Attachments (0)</a>

12.

Select the **Comments** link.

The screenshot shows the same 'Asset Management' interface. The 'Comments' link for the first asset (1CA-00000607) is highlighted with a red box. The table below lists assets for disposal.

Dispose	Asset ID	Description	Comments	Attachments
<input checked="" type="checkbox"/>	1CA-00000607	COMPUTER EQUIPM	<a href="#">Comments (0)</a>	<a href="#">Attachments (0)</a>
<input type="checkbox"/>	1CA-00000609	COMPUTER EQUIPM	<a href="#">Comments (0)</a>	<a href="#">Attachments (0)</a>
<input type="checkbox"/>	1CA-00000610	COMPUTER EQUIPM	<a href="#">Comments (0)</a>	<a href="#">Attachments (0)</a>
<input type="checkbox"/>	1CA-00000611	COMPUTER EQUIPM	<a href="#">Comments (0)</a>	<a href="#">Attachments (0)</a>
<input type="checkbox"/>	1CA-00000612	COMPUTER EQUIPM	<a href="#">Comments (0)</a>	<a href="#">Attachments (0)</a>



13.

Enter the desired information into the **Comment** field.

Asset Management

Disposal Worksheet

Asset Search Criteria

Acquisition Details

Asset Comments

Unit: CH Asset ID: 1CA-00000607 COMPUTER EQUIPM Tag Number: 829644 In Service

Comments

Comment

User ID Name Date/Time Stamp Source

1 04/02/2021 6:12:56AM

OK Cancel Apply

Asset ID	Asset Name	Comments (0)	Attachments (0)
1CA-00000610	COMPUTER EQUIPM	Comments (0)	Attachments (0)
1CA-00000611	COMPUTER EQUIPM	Comments (0)	Attachments (0)
1CA-00000612	COMPUTER EQUIPM	Comments (0)	Attachments (0)

14.

Select the **OK** button.

Asset Management

Disposal Worksheet

Asset Search Criteria

Acquisition Details

Asset Comments

Unit: CH Asset ID: 1CA-00000607 COMPUTER EQUIPM Tag Number: 829644 In Service

Comments

Comment

User ID Name Date/Time Stamp Source

1 04/02/2021 6:12:56AM

OK Cancel Apply

Asset ID	Asset Name	Comments (0)	Attachments (0)
1CA-00000610	COMPUTER EQUIPM	Comments (0)	Attachments (0)
1CA-00000611	COMPUTER EQUIPM	Comments (0)	Attachments (0)
1CA-00000612	COMPUTER EQUIPM	Comments (0)	Attachments (0)

15.

If applicable, select the **Attachments** link.

The screenshot shows the 'Asset Management' interface. At the top, there's a 'Saving Page' indicator. Below it, there are sections for 'Asset Search Criteria' and 'Acquisition Details'. A 'Retrieve Next' button is visible. The 'Asset Action' section includes a 'Submit for Disposal' button and fields for 'Disposal Code', 'Retire Date', 'Accounting Date', 'Adjust Retire Quantity By', and 'Adjust Retire Amount By'. The 'Search Results' section shows a table with columns: 'Dispose', 'Asset ID', 'Description', 'Comments', and 'Attachments'. The first row has a checked 'Dispose' checkbox, Asset ID '1CA-00000607', Description 'COMPUTER EQUIPM', 'Comments (1)', and 'Attachments (0)' (highlighted with a red box). Subsequent rows show similar data with 'Attachments (0)'.

Dispose	Asset ID	Description	Comments	Attachments
<input checked="" type="checkbox"/>	1CA-00000607	COMPUTER EQUIPM	Comments (1)	Attachments (0)
<input type="checkbox"/>	1CA-00000609	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000610	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000611	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000612	COMPUTER EQUIPM	Comments (0)	Attachments (0)

16.

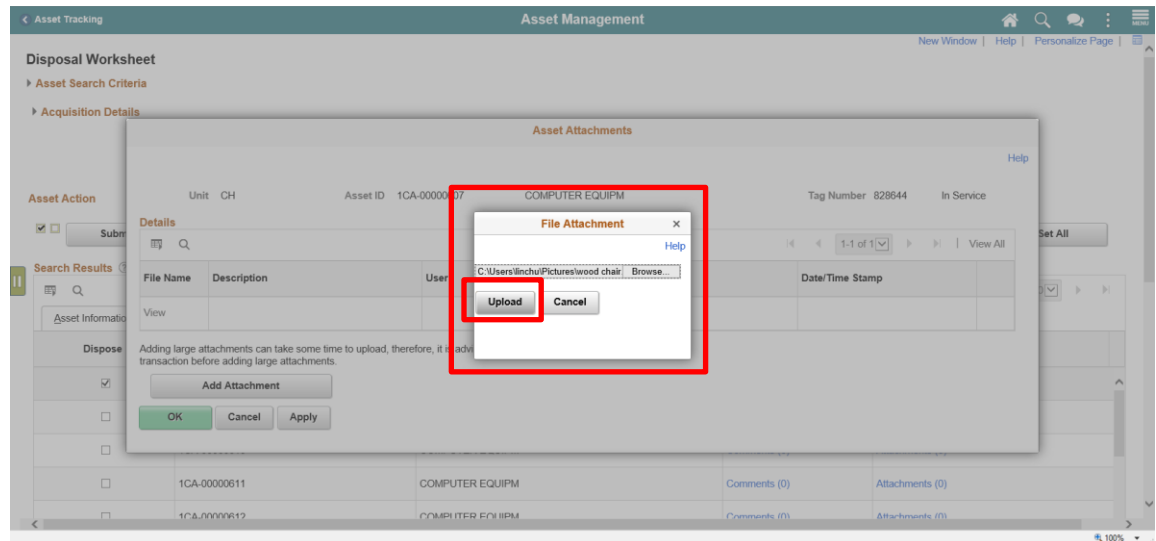
Select the **Add Attachment** button.

The screenshot shows the 'Asset Attachments' dialog box. At the top, it displays 'Unit: CH', 'Asset ID: 1CA-00000607', 'Description: COMPUTER EQUIPM', 'Tag Number: 828644', and 'In Service'. Below this is a 'Details' section with a search bar and a table with columns: 'File Name', 'Description', 'User', 'Name', and 'Date/Time Stamp'. The table is currently empty. Below the table, there's a message: 'Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.' At the bottom, there are three buttons: 'Add Attachment' (highlighted with a red box), 'OK', 'Cancel', and 'Apply'.

File Name	Description	User	Name	Date/Time Stamp
View				

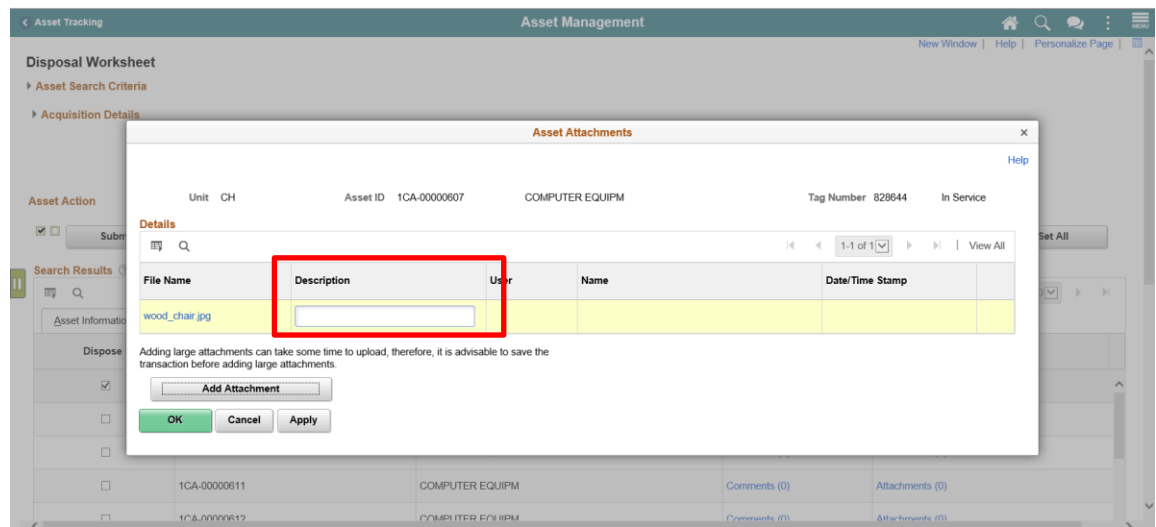
17.

Select the file to add to the disposed asset and select **Upload**.



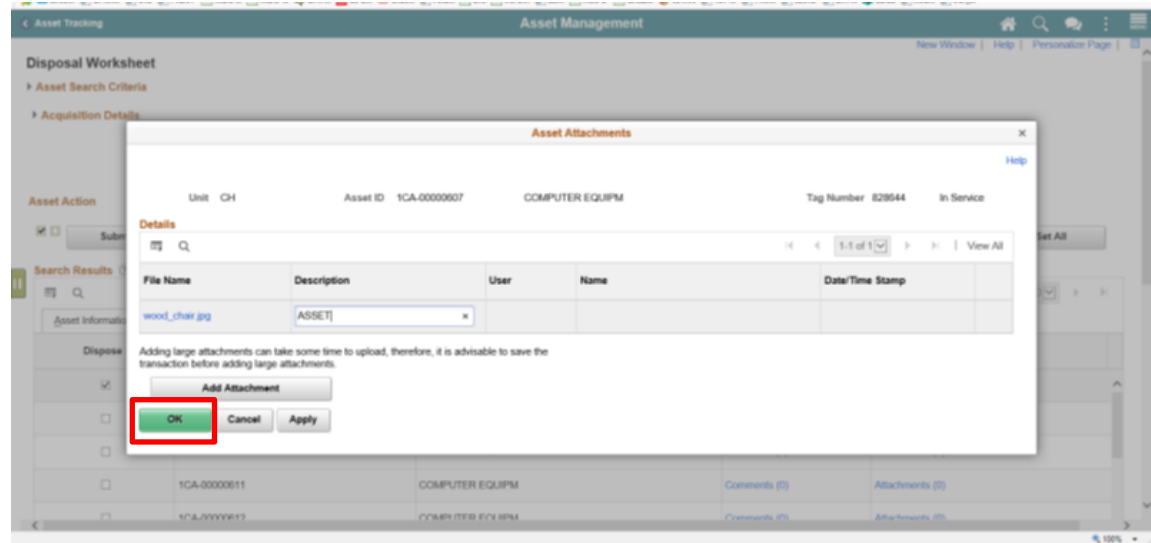
18.

Enter the desired information into the **Description** field.



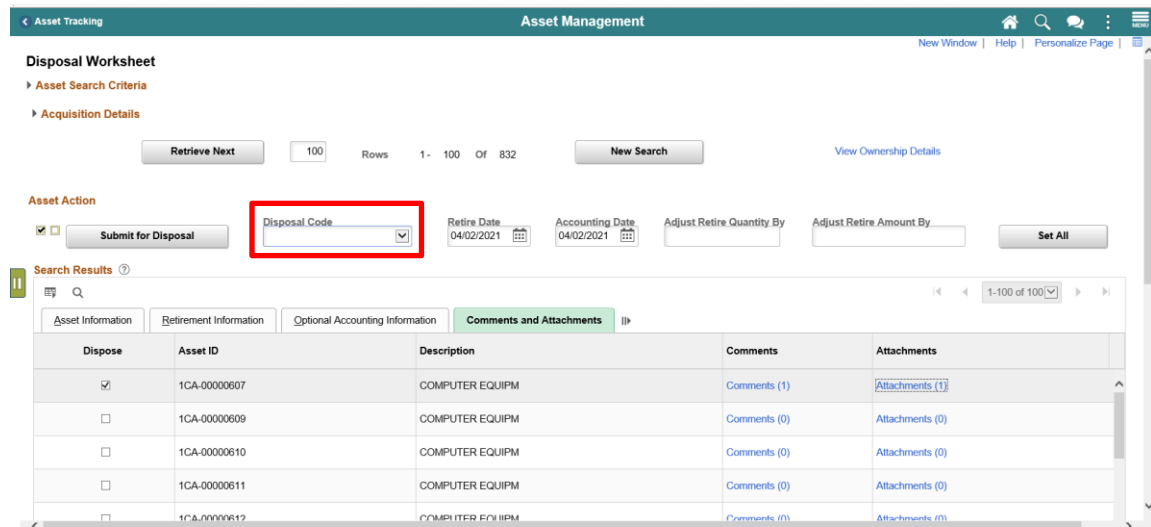
19.

Select the **OK** button.



20.

Select a **Disposal Code** from the dropdown. Central ISD will provide the Disposal Code when they approve the asset disposal. You can apply the dates and Disposal Code to all selected assets by selecting **Set All**



21.

Select the applicable **Disposal Code**.

The screenshot shows the 'Asset Management' interface with the 'Disposal Worksheet' tab selected. Under 'Asset Action', the 'Submit for Disposal' button is highlighted. A red box highlights the 'Disposal Code' dropdown menu, which is open and showing a list of options: Abandonment, Casualty Loss for Other Assets, Casualty Loss, Disappeared Assets, Disposal Due to Theft, Donated to External Group, Expensed, Missing Asset, Retirement by Sale, Returned to Inventory, Scrapped Assets, and Traded in for another Asset. The 'Retire Date' and 'Accounting Date' are both set to 04/02/2021. The 'Search Results' table shows a list of assets, with the first row selected.

Dispose	Asset ID	Description	Comments	Attachments
<input checked="" type="checkbox"/>	1CA-00000607	COMPUTER EQUIPM	Comments (1)	Attachments (1)
<input type="checkbox"/>	1CA-00000609	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000610	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000611	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000612	COMPUTER EQUIPM	Comments (0)	Attachments (0)

22.

Confirm the **Retire Date and Accounting Date**.

The screenshot shows the 'Asset Management' interface with the 'Disposal Worksheet' tab selected. Under 'Asset Action', the 'Submit for Disposal' button is highlighted. A red box highlights the 'Retire Date' and 'Accounting Date' fields, both of which are set to 04/02/2021. The 'Disposal Code' dropdown menu is also visible, showing 'Donated to External Group' as the selected option. The 'Search Results' table shows a list of assets, with the first row selected.

Dispose	Asset ID	Description	Comments	Attachments
<input checked="" type="checkbox"/>	1CA-00000607	COMPUTER EQUIPM	Comments (1)	Attachments (1)
<input type="checkbox"/>	1CA-00000609	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000610	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000611	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000612	COMPUTER EQUIPM	Comments (0)	Attachments (0)

23.

Select the **Submit for Disposal** button.

The screenshot shows the 'Asset Management' interface. At the top, there is a header bar with a back arrow, 'Asset Tracking', 'Asset Management', and icons for home, search, chat, and menu. Below the header is a table with 5 columns: a checkbox, an ID, a description, 'Comments (0)', and 'Attachments (0)'. The table contains 12 rows of data, all with 'COMPUTER EQUIPM' as the description. Below the table, there are two buttons: 'Submit for Disposal' (highlighted with a red box) and 'Notify'.

	ID	Description	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000612	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000613	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000614	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000615	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000625	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000626	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000627	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000628	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000629	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000630	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000631	COMPUTER EQUIPM	Comments (0)	Attachments (0)

Buttons: **Submit for Disposal**, Notify

24.

Select the **OK** button.

The screenshot shows the same 'Asset Management' interface as in step 23, but with a warning dialog box open in the center. The dialog box contains the text: 'Warning -- Are you sure you want to submit selected assets for disposal? (8005,108)' and 'You requested to submit selected assets for disposal. Press OK to continue or Cancel to stop this action.' The 'OK' button in the dialog box is highlighted with a red box. Below the dialog box, the 'Submit for Disposal' and 'Notify' buttons are still visible.

	ID	Description	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000612	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000613	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000614	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000615	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000625	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000626	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000627	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000628	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000629	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000630	COMPUTER EQUIPM	Comments (0)	Attachments (0)
<input type="checkbox"/>	1CA-00000631	COMPUTER EQUIPM	Comments (0)	Attachments (0)

Buttons: **Submit for Disposal**, Notify

Warning Dialog Box:

Warning -- Are you sure you want to submit selected assets for disposal? (8005,108)  
 You requested to submit selected assets for disposal. Press OK to continue or Cancel to stop this action.

Buttons: **OK**, Cancel

25.	<p>After you select <b>OK</b>, the retirement information is loaded into the interface tables after is full approved by the workflow designed.</p> <p>The next step is to review and approve this transaction by Grant Administrator Manager withing your Business Unit, the Department Asset Manager, and Internal Services Business Unit Central. When all approved, the Department Asset Manager will review the interfaced data and load the transactions into Asset Management.</p> <p><b>End of Procedure.</b></p>
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