QUICK REFERENCE GUIDE

Using the Search for an Asset Page

December 4, 2015

Use the Search for an Asset Page

This topic covers searching for an asset and selecting an Asset Management component (page) to work with.

Steps to complete:

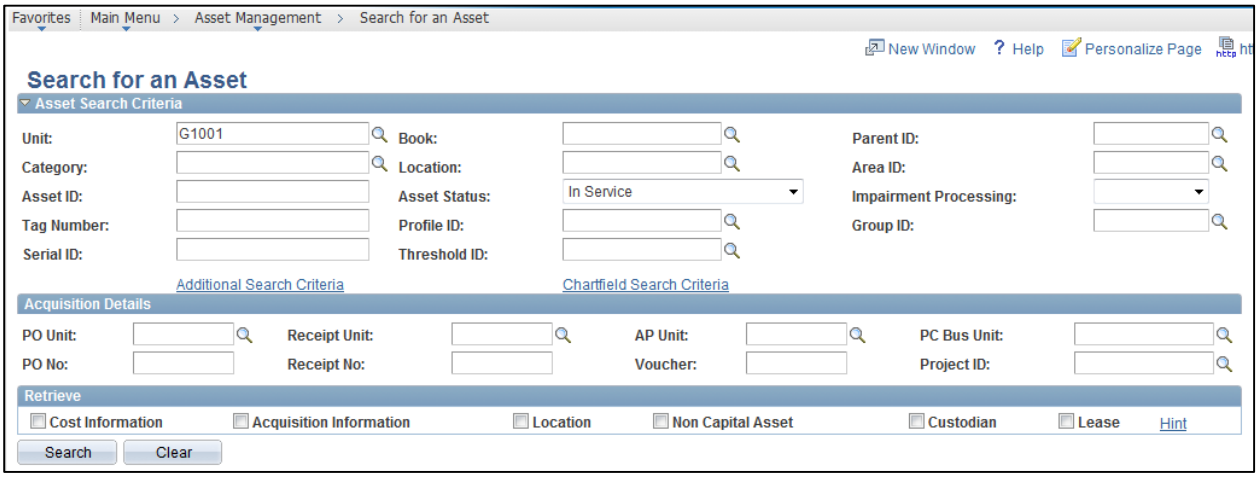
- Step 1: Enter Search Criteria on the Search for an Asset page
- Step 2: Optionally, Enter Additional Search Criteria
- Step 3: Optionally, Enter ChartField Search Criteria
- Step 4: Enter Search Results Selections in the Retrieve Section
- Step 5: View Search Results
- Step 6: Select an Asset and Component to Work With

Step 1: Enter Search Criteria on the Search for an Asset page

You can search for an asset based on the specified criteria on the *Search for an Asset* page. After you have performed the search, you can also use links to quickly access other Asset Management pages to review or enter asset information for the selected asset, such as review asset depreciation or change the funding string for an asset.

Begin by navigating to the *Search for an Asset* page.

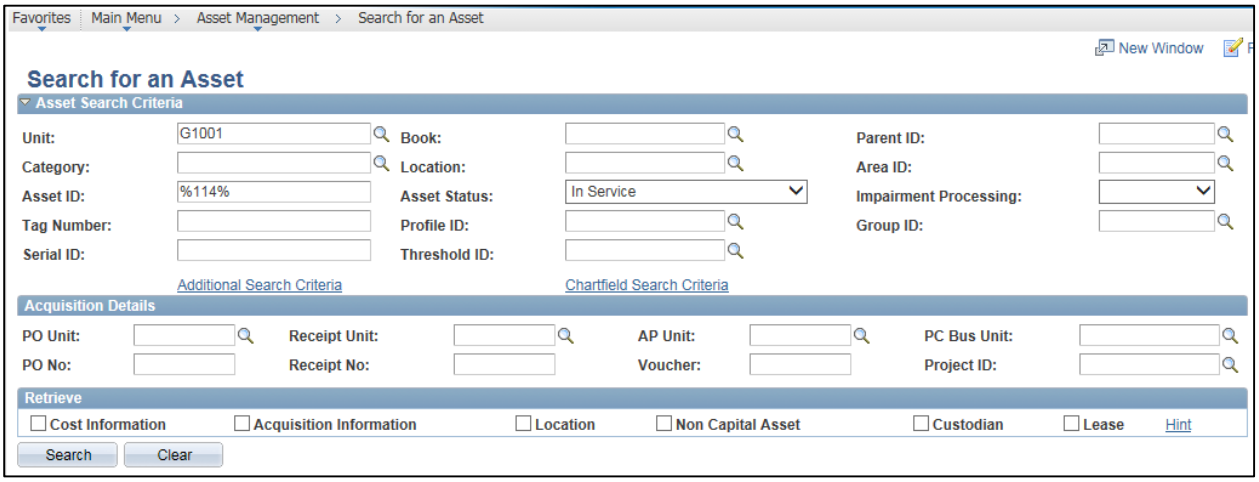
1. **Navigation Links**: Asset Management, Search for an Asset.



Note: The Asset Status criteria field is initially set to “In Service”. If you are searching for assets with other statuses, such as “Received (Not in Service)”, you’ll need to make sure to change this search field.

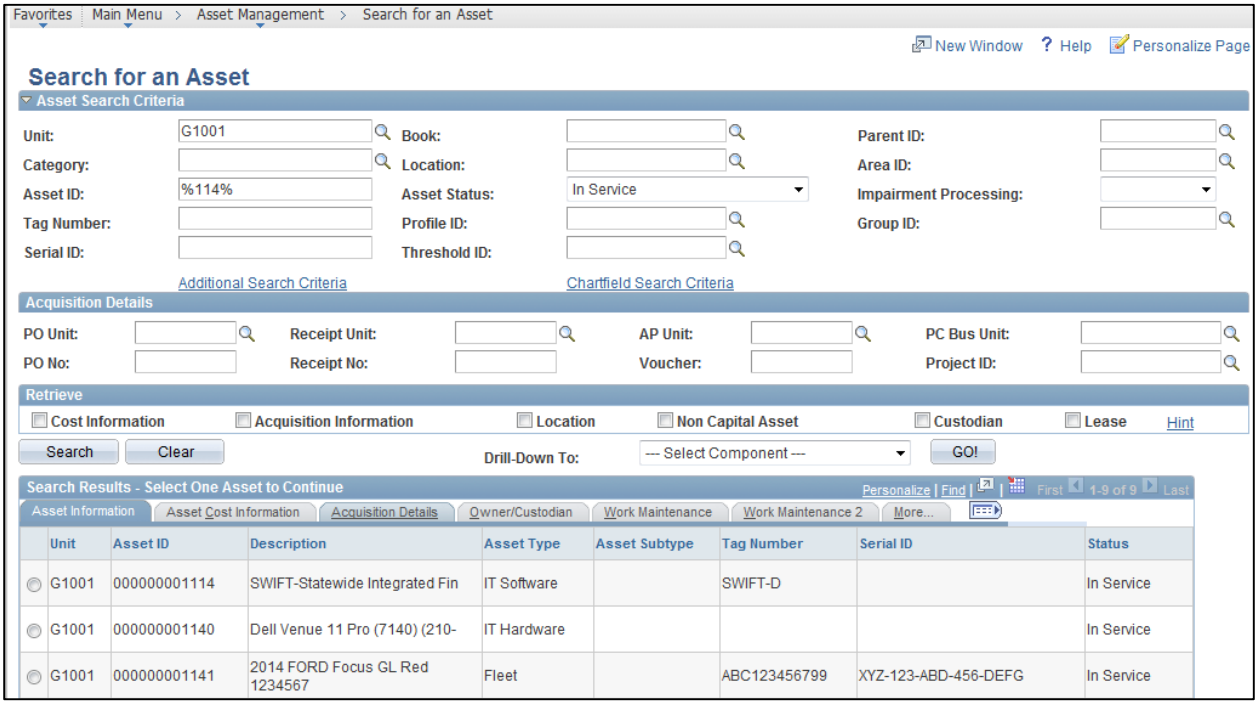
2. Enter information in the **Asset Search Criteria** section as described below.

   Note: The percent sign (%) can be used as a wild card to replace one or more characters of a field.

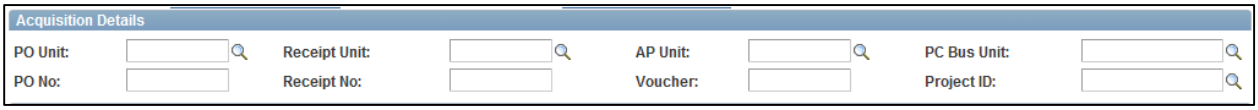


Field	Field Description
Unit (display only)	Accept the default *Business Unit* or click on the **Lookup** icon and select a different *Business Unit*.
Category	Click on the **Lookup** icon and select an asset *Category* to limit your search (such as Equipment, Furniture and Fixtures).
Asset ID	Enter an *Asset ID* to limit your search. The percent sign % can be used to replace one or more characters.
Tag Number	Enter a *Tag Number* if your agency uses asset tags.
Serial ID	Enter a *Serial ID* to limit your search.
Book	Minnesota only uses one book "MINN".
Location	Click on the **Lookup** icon and select the *Location.*
Asset Status	Accept the default "In Service" or select a different *Asset Status* from the drop-down list. Commonly used options include: • Disposed: Asset has been disposed of. • In Service: Asset is in service and depreciating (when applicable) • Received (Not in Service): Asset has been received but not yet placed in service. • Transferred: The asset has been transferred to a different business unit.
Profile ID	Click on the **Lookup** icon and select a *Profile ID* to limit your search.
Threshold ID	State of Minnesota does not use.
Parent ID	If you select a value in the *Parent ID* field, SWIFT will retrieve the parent asset and any child assets associated with it.
Area ID	State of Minnesota does not use.
Impairment Processing	State of Minnesota does not use.

Field	Field Description
Group ID	State of Minnesota does not use.

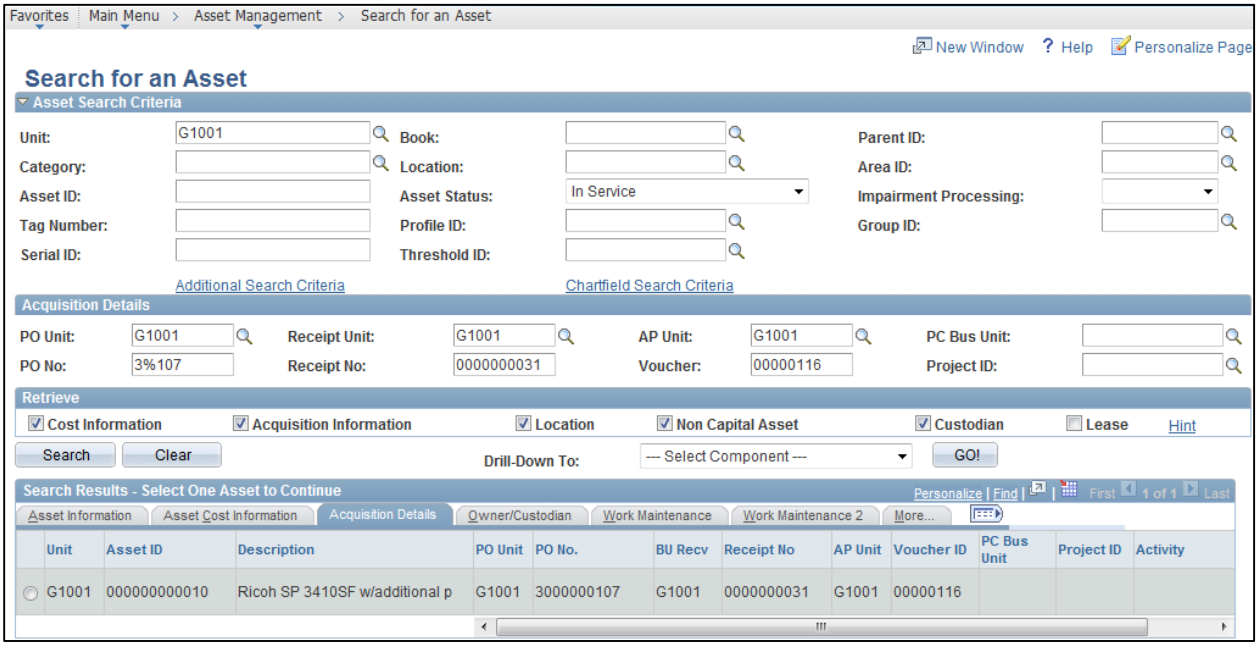


3. Optionally, search for purchased assets by entering search criteria in the **Acquisition Details** section as described below.



Field	Field Description
PO Unit	Enter the *Purchase Order Unit* (same as your *Business Unit*.) **Note**: if you do not enter additional criteria, all purchased assets for the Purchase Order Unit will be returned in the search results.
PO No.	Enter a PO Number (“3000000107”). The percent sign % wild card can be used.
Receipt Unit	Enter the *Receipt Unit* (same as *Business Unit*.) **Note**: if you do not enter additional criteria, all receipted assets for the *Receipt Unit* will be returned in the search results.
Receipt No	Enter a *Receipt Number* (“0000000031”). The percent sign % wild card can be used.
AP Unit	Enter the *Accounts Payable Unit* (same as *Business Unit*.)
Voucher	Enter a *Voucher ID*. The percent sign % wild card can be used.
PC Bus Unit	Enter a *PC Bus Unit* (part of project coding).

Field	Field Description
Project ID	Click on the **Lookup** icon and select a *Project ID*.

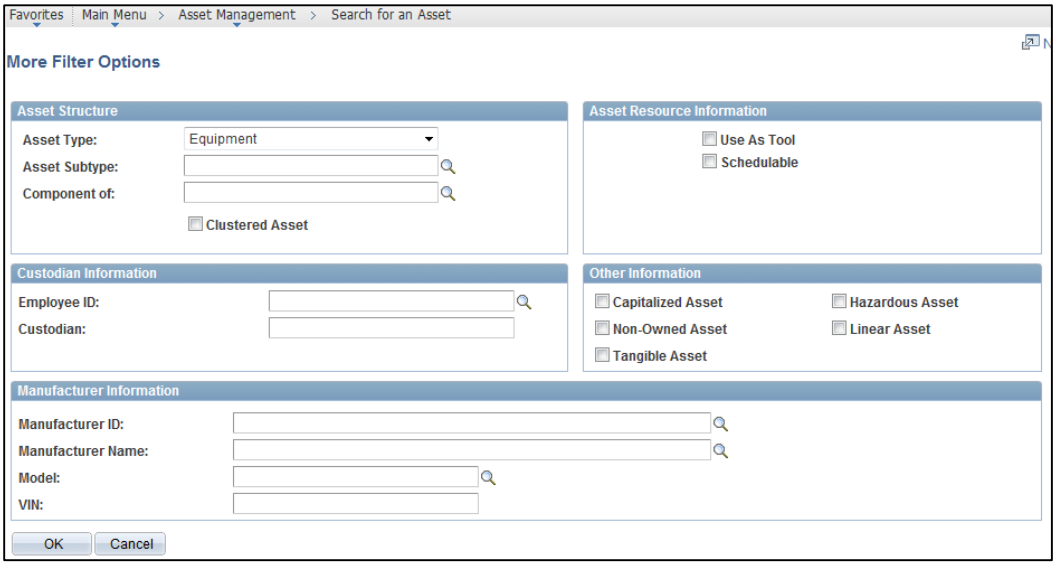


Note: Multiple rows often display for purchased assets. You may see a row for the receipt and voucher transactions, and you may see additional rows if multiple funding sources were used. You only need to select one of the rows before selecting a component in Step 6.

Step 2: Optionally, Enter Additional Search Criteria

Optionally, click on the *Additional Search* link to search by additional asset fields, such as Asset Type, Custodian, or Manufacturer.

1. Click on the **Additional Search Criteria** link to further limit your search. The *More Filter Options* page displays.



2. Enter search criteria as described below.

Field	Field Description
Asset Type	Select an Asset Type from the drop-down listing (such as “Equipment”, “Facility”, “Fleet”, “Furniture”).
Asset Subtype	If your agency uses *Asset Subtypes*, you can click on the **Lookup** and select an *Asset Subtype* to limit your search. An *Asset Type* must be selected first.
Component of	State of Minnesota does not use.
Clustered Asset	State of Minnesota does not use.
Employee ID	Click on the **Lookup** icon and select an *Employee ID* for a custodian to limit your search.
Custodian	Enter a *Custodian* to limit your search. The format is “Last Name, First Name”. The comma is required.
Manufacturer ID	Click on the **Lookup** icon and select a *Manufacturer ID* to limit your search.
Manufacturer Name	Click on the **Lookup** icon and select a *Manufacturer Name* to limit your search.
Model	Click on the **Lookup** icon and select a *Model* to limit your search.
VIN	Enter a VIN to limit your search.

- Options in the **Asset Resource Information** and **Other Information** sections are not used or are not recommended for use.

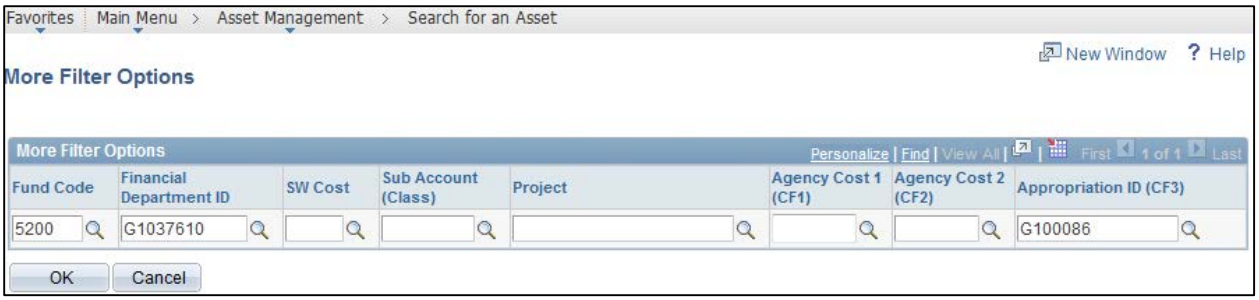
3. Click on the **OK** button to return to the *Search for Asset* page and your criteria will be used to limit your search results.

- If you no longer want to use the optional filters, click on the **Clear** button.

Step 3: Optionally, Enter ChartField Search Criteria

Use the *ChartField Search Criteria* link to search for assets related to a specific funding.

1. Click on the **ChartField Search Criteria** link in the **Asset Search Criteria** section.



2. Enter search criteria as described below.

Field	Field Description
Fund Code	Click on the **Lookup** icon to select a valid *Fund*. Fund is the building block of Government Accounting. All transactions in the system must have a valid Fund.
Financial Department ID	Click on the **Lookup** icon to select a valid *Financial Department ID*. The *Fin Dept ID* (Financial Department Identifier) represents the organizational function to which revenues and other activities must be applied. Combined with other ChartField values, Fin Dept ID's form the basis of department budgets that track revenues and expenditures.
Statewide Cost (Prog)	Optionally, click on the **Lookup** icon to select a *Statewide Cost* code.
Sub Account (Class)	Optionally, click on the **Lookup** icon to select a Sub Account.
Project	Optionally, click on the **Lookup** icon and select a *Project ID*.
Agency Cost 1 (CF1) **Agency Cost 2 (CF2)**	Optionally, click on the **Lookup** icon and select an *Agency Cost 1* or *Agency Cost 2* code. *Agency Cost 2* code. *Agency Cost 1* and *Agency Cost 2* are agency specific fields that are used at the agency's discretion.
Appropriation ID (CF3)	Click on the **Lookup** icon to select an *Appropriation ID*.

3. From the *More Filter Options* page, click on the **OK** button to return to the *Search for Asset* page and your criteria will be used to limit your search results.
   - If you no longer want to use the optional filters, click on the **Clear** button.

Step 4: Enter Search Results Selections in the Retrieve Section

You can use the **Retrieve** section to indicate what type of information will be retrieved about assets that meet your search criteria.

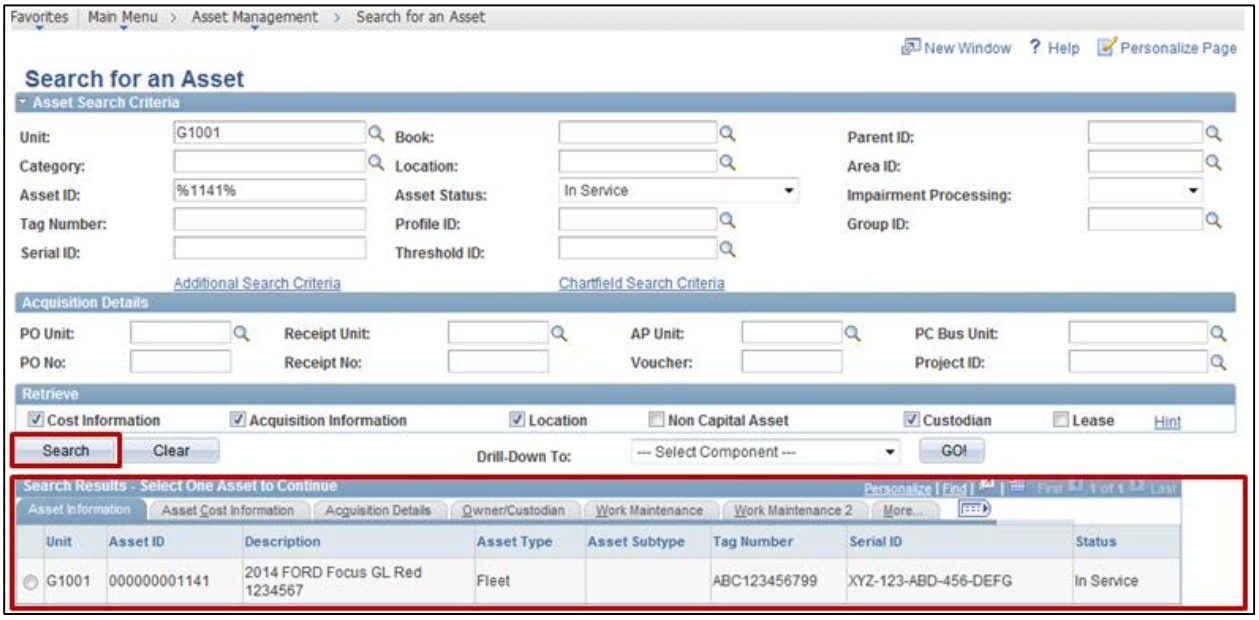
1. Complete the **Retrieve** section as described below.
   - If you entered search criteria that relate to cost information, acquisition details, location, or custodian, it is not necessary to check the option; the information will be retrieved automatically.
   - The **Asset Information** tab information is always retrieved (Asset ID, Description, Asset Type, Tag Number, etc.)

Checkbox	Description
Cost Information	Click on the *Cost Information* checkbox to view **Asset Cost Information** tab information in the search results such as *Fund*, *Fin DeptID*, and *Approp ID*.
Acquisition Information	Click on the *Acquisition Information* checkbox to view **Acquisition Details** tab information in the search results, such as *PO Number* and *Voucher ID*.
Location	Click on the *Location* checkbox to view asset Location Codes in the search results on the **More** tab.
Non Capital Asset	The *Non Capital Asset* check box is used only when *Acquisition* and *Cost* check boxes are active or a search field having value for both Acquisition and Cost is used.
Custodian	Click on the *Custodian* checkbox to view **Owner/Custodian** tab information in the search results.
Lease	State of Minnesota does not use.
Hint link	Click on the *Hint* link to display information about what each checkbox in the **Retrieve** section will return when you search for an asset.

Step 5: View Search Results

After selecting your search criteria, you are ready to launch your search and view the results.

1. Click on the **Search** button. The assets meeting your criteria display in the **Search Results** listing.



Note: Multiple rows often display for purchased assets. You may see a row for the receipt and voucher transactions, and you may see additional rows if multiple funding sources were used. You only need to select one of the rows before selecting a component in Step 6.

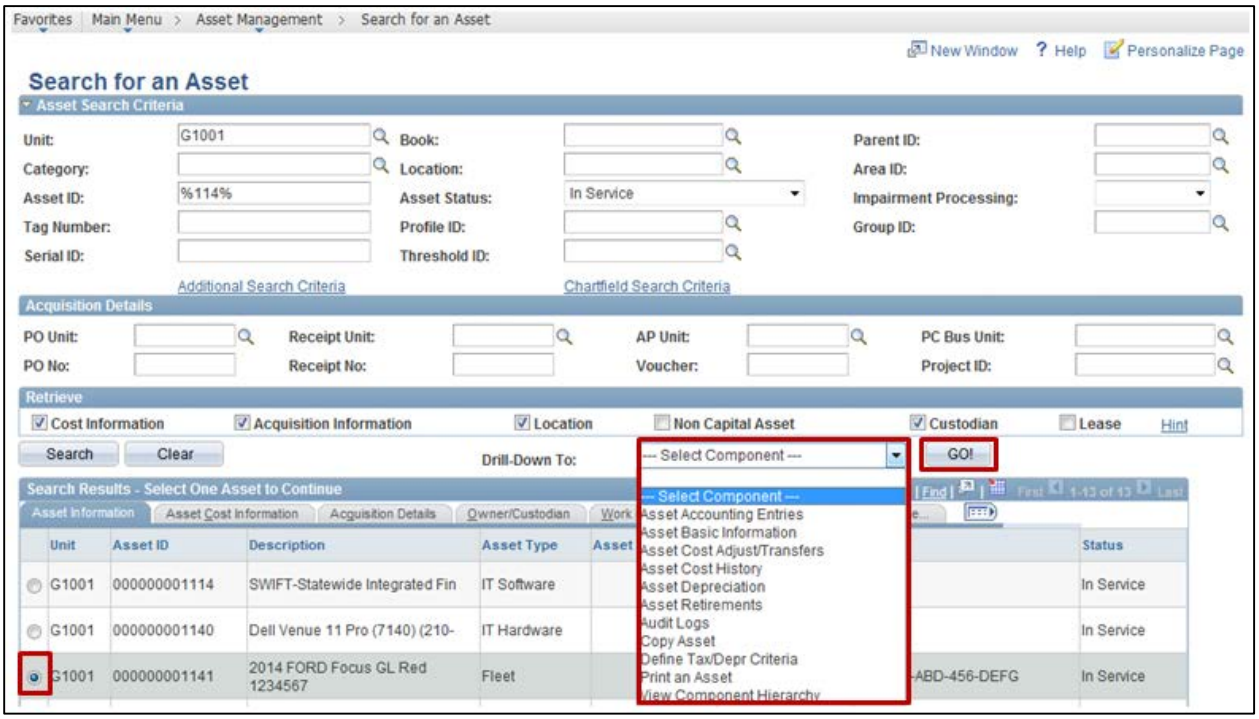
2. View the Search Results. Information on the tabs include:

Tab	Description
Asset Information	Displays *Unit, Asset ID, Description, Asset Type, Asset Subtype, Tag Number, Serial ID* and *Status.*
Asset Cost Information	Displays *Fund, Fin DeptID, SW Cost, Sub Acct, Project, Agcy Cost 1 and 2, Approp Id, Category, Cost Type, Quantity, Cost, and Currency*.
Acquisition Details	Displays *PO Unit, PO No., BU Recv, Receipt No., AP Unit, Voucher ID, PC Bus Unit, Project ID,* and *Activity*.
Owner/Custodian	Displays *Employee ID, Custodian, Asset Custodian DeptID,* and *Offsite flag.*
Work Maintenance	Displays *Capitalized Asset* flag.
Work Maintenance 2	Displays *VIN number, Linear flag,* and *Non-owned Asset flag*.
More	Displays *Profile ID, Parent ID, Location, Manufacturer ID, Model number,* and *Replacement Cost.*

Step 6: Select an Asset and Component to Work With

Now you can select an asset listed in the search results and select a component from the **Drill-Down To** listing to work with the asset.

1. Select an asset in the search results by clicking on the corresponding button.



Note: Multiple rows often display for purchased assets. You may see a row for the receipt and voucher transactions, and you may see additional rows if multiple funding sources were used. You only need to select one of the rows before selecting a component.

2. After selecting an asset in the search results, select a component from the **Drill-Down To** listing and click on the **GO**! button. Options include.

Component	Description
Asset Accounting Entries	Opens the *Review Financial Entries* page in a new window. Refer to the "Viewing Financial (Accounting) Entries" topic in the Asset Management User Guide (AM1- Part 2).
Asset Basic Information	Opens the *Basic Add* pages in a new window where you can view and update the asset record. Refer to the "Creating (or Updating) Assets with Basic Add" topic.
Asset Cost Adjust/Transfer	Opens the *Cost Adjust/Transfer Asset* page in a new window. Refer to Lesson 2: Maintaining Asset Financials in the Asset Management User Guide (AM1 - Part 2).
Asset Cost History	Opens the *Review Cost* pages in a new window. Refer to the "Viewing Cost History" topic.

Component	Description
Asset Depreciation	Opens the *Asset Depreciation* pages in a new window. Refer to the "Running Depreciation Calculation Between Transactions" topic and the "Viewing Depreciation Information" topic in the Asset Management User Guide (AM1- Part 2).
Asset Retirements	This option is not used.
Audit Logs	This option is not used.
Copy Asset	Opens *the Create Asset Copies* pages in a new window. Refer to "Creating Assets with Copy Asset" topic in the Asset Management User Guide (AM1 - Part 2).
Define Tax/Depr Criteria	Opens the *Define Tax/Depr Criteria* pages which display the Book Depreciation settings for the asset.
Print an Asset	Opens the *Printable View of Asset* page. Refer to the "Printing an Asset" topic in the Asset Management User Guide (AM1 - Part 2).
View Component Hierarchy	This option is not used.