



My Personalizations > Navigation Personalizations

You can turn off the Auto - Complete functionality for all pages.



You can also set the Drop Down Menu to be permanently sorted alphabetically (Ascending or Descending)



Personalize Page

The AutoComplete can also be disabled at the Component and Page level by going to the Personalize Page link from the page.

Page Personalization



	Test Scenario	Expected Result
1	From Home page: Click on Personalize Content and choose Menu type: f Top Menu, Menu (left), or Main menu (left with icons)	User is able to choose Menu Option
2	Navigate to My Personalizations > Navigation Personalizations Choose your menu sort and AutoComplete options (if desired). (Menu sort only applicable to Top Menu)	User is able to select options and it has the desired effect

Basic PeopleSoft Asset Management functionality remains the same

AM Security remains unchanged.

Some modifications due to the elimination of BOR modifications in favor of PS delivered functionality

Ex: Federal Assets

New functionality

Ability to add items that need to be tracked that are less than \$3000

Express Add





Exposure to the new 9.2 environment
Ensure that you are able to execute key processes such as creating assets, performing adjustments, and running month end processes

High level validation of data (please keep timing differences in mind)

Additional business unit specific testing outside of the ITS system testing





Adding Assets.

Add an Asset with a cost over \$5000.00 using Basic

Add an asset with a cost over \$5000.00 using
Express Add

Only basic asset information is available to entry (i.e.
no access to licenses, attributes, etc .)

Capitalization occurs upon Save

Add an asset with a cost below \$3000.00. These
will be physical assets (below the 3000 threshold)

Items with a cost below 3000.00 are stored in a
separate table, Cost_Non_Cap



Asset Information

Unit 53000	Asset ID NEXT
Profile ID COMP05YR	Trans Date 02/11/2015
Description UAT Test Asset	Acctg Date 01/31/2015
Location 0031	Trans Code
Number 100	Tag Number 33158
<input type="checkbox"/> Accum Depr in Current Pd	Rate Type AVG

Asset Cost Information

Book Name	Quantity	Cost Basis	Category	Cost Type	Accum Depr	YTD Depr
PLR						



Physical Assets

Asset Information

Unit: 8000 Asset ID: NEXT

Profile ID: 8000 Trans Date: 01/01/2018

Location: 0001 FULL (SAFETY) BLDG Trans Code: [dropdown]

Rate Status: 0000 [dropdown]

message

ive as Physical? (8005,193)

Capitalization Threshold determines that this asset will not be capitalized but can be stored in AM for physical inventory purposes. Continue?

11100 11000

OK Cancel

Category	Cost Type	Accum Depr	
		0.00	
Chartfields			
Fund	Dept	Program	Class
		10000	0611800

Asset Additional Information

Asset Type: Other

Seq# CAP#

Threshold ID: UNDERCK Hazardous: Made In

Asset Class: [dropdown] Taggable Asset

Asset Status: In Service Capitalized Asset

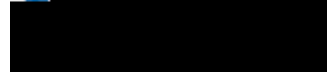
Acquisition Date: 01/01/2018 81

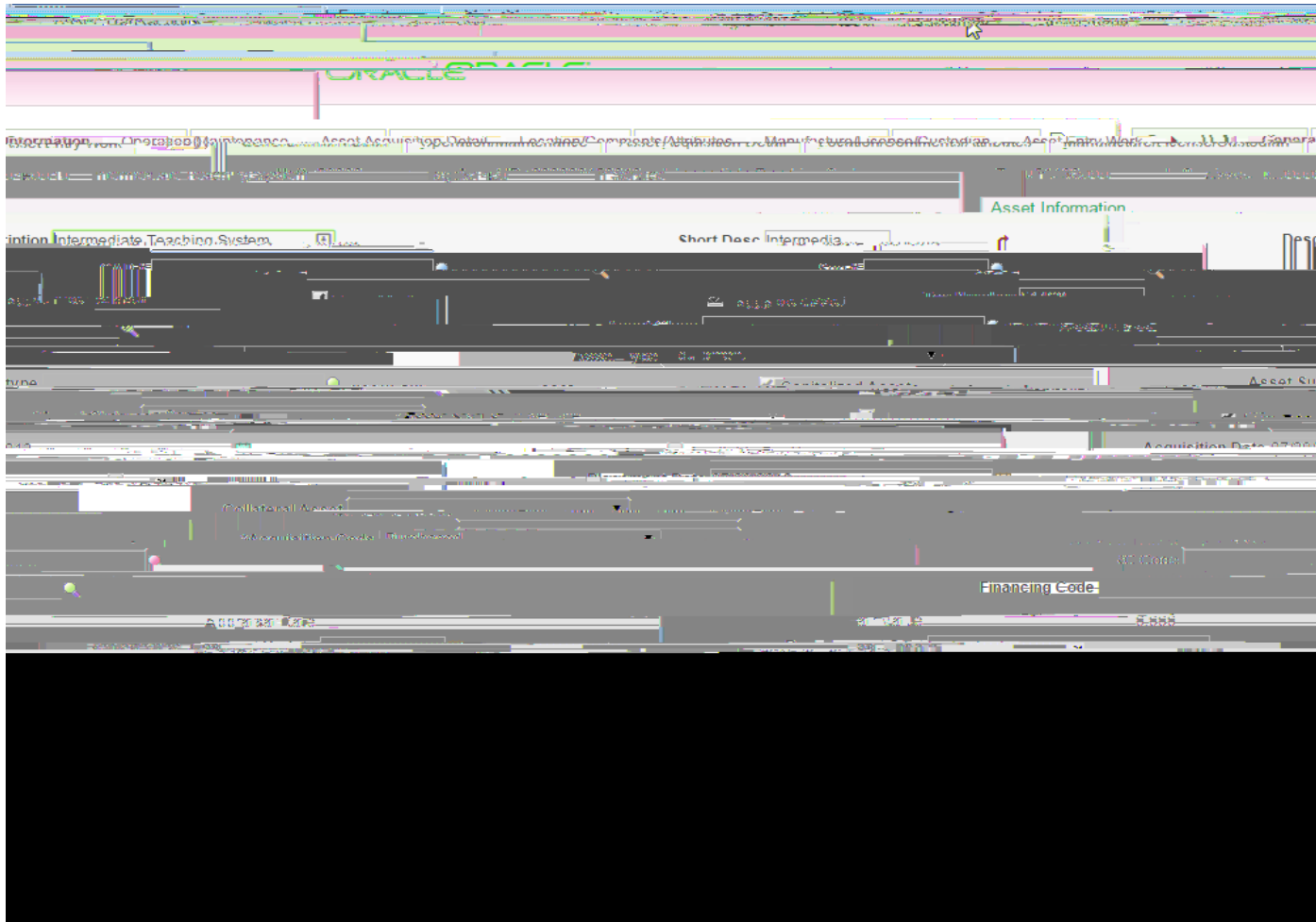
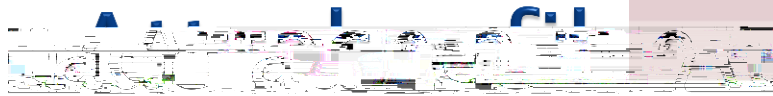
Parent ID Parent Child

Buttons: Add, Save, Notify



	Test Scenario	Expected Result
3	Add an Asset with a cost over \$5000.00 using Basic Add AM Asset Transactions Owned Assets Basic Add	Asset will be created
4	Add an asset with a cost over \$5000.00 using Express Add. Use a January accounting date. AM Asset Transactions Owned Assets Express Add	Asset will be created
5	Add an asset with a cost below \$3000.00 using Basic Add or Express Add. Use a	

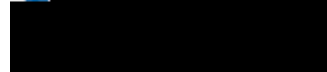






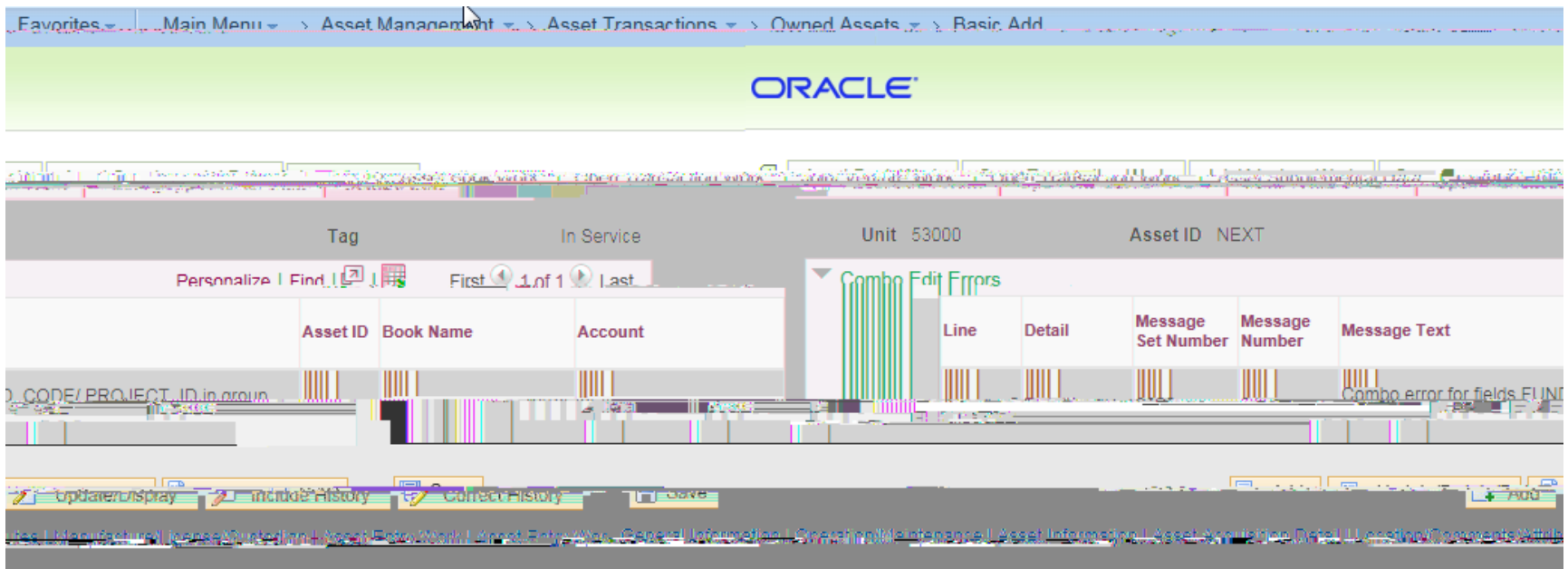
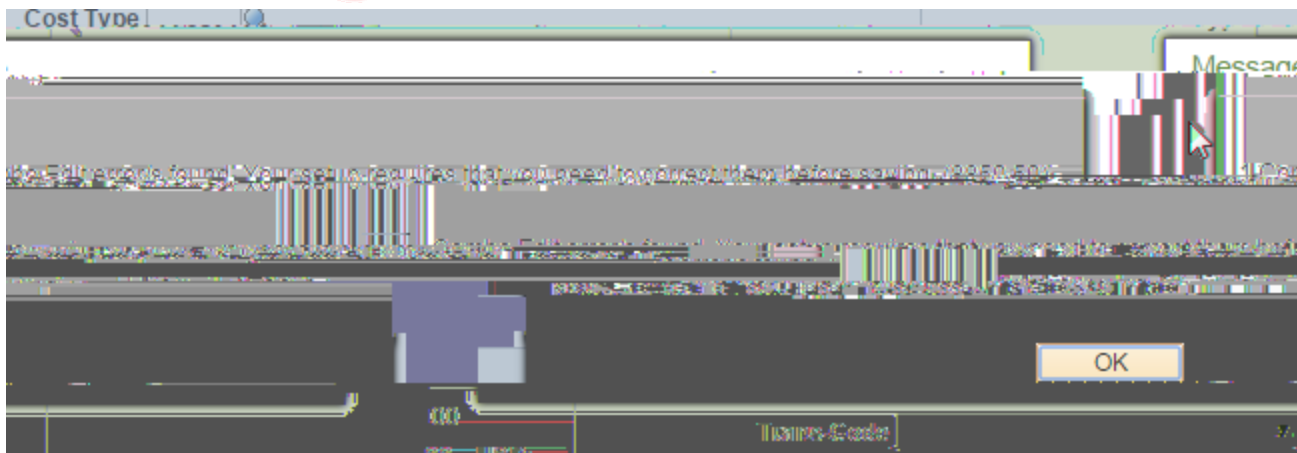


	Test Scenario	Expected Result
6	<p>Attach a file to an asset either one you are creating in UAT or an existing asset.</p> <p>AM Asset Transactions Owned Assets Basic Add.</p> <p>Link at the bottom of the General Information tab.</p>	<p>See the Attachments link on the General Information page</p> <p>Successfully able to attach a file</p>






Asset Management Software






	Test Scenario	Expected Result
7	<p>Attempt to add an asset with a fund code = 20000 with no project id in Basic Add, Asset Acquisition Detail.</p> <p>AM AEAsset Transactions AOOwned Assets ABBasic Add.</p>	





Federal Assets will be tracked using PeopleSoft delivered fields

Asset Class Field will store type of federal asset
Asset Attribute fields will store agency, condition,
and percent



Equipment Main Menu Asset Management Asset Transactions Owned Assets Basic Add

Tag In Service Unit 53000 Asset ID NEXT

Asset Information

CAP # Seq #

Tan Number

Asset Class

Asset Type IT Hardware

Subtype

Asset Status In Service

Acquisition Date 02/11/2015

Retirement Date 02/11/2015

Collateral Asset

*Acquisition Code

Asset Class Description

Financing Code

Region Code

Replacement Cost

Index Name

Subindex Name

Parent/Child None

Profile ID COMP05YR

Threshold ID UNDER3K

Composite Asset Composite Asset ID

Look Up Asset Class

SetID: SHARE

Asset Class: begins with

View: 100 First 1-2 of 2 Last

Search Results

Federal, Federal Title

Federal, Institution Title

[Favorites](#) | [Main Module](#) | [Asset Management](#) | [Asset Transactions](#) | [Grand Assets](#) | [Basic Add](#)

ORACLE

[Acquisition Detail](#) | [Location/Comments/Attributes](#) | [Manufacture/License/Custodian](#) | [General Information](#) | [Operation/Maintenance](#) | [Asset Information](#) | [Asse](#)

Unit 53000 Asset ID NEXT Tag In Service

Location
 Comments
 Physical and Custom Attributes Find | View All First 1 of 1 Last

Effective Date 02/11/2015

Height Height Units
 Width Width
 Length Units Length
 Weight Units Weight
 Capacity Capacity Units
 Power Rating Power Rating Units

Custom Attributes

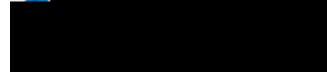
Attribute Name	Value	Unit
FEDAGENCY	Good	Federal Agency
FEDCOND	100	Federal Condition
FEDPERCENT		Federal Percentage

Detailed Description
 Image

Include History Contact History Save Add Update/Display



	Test Scenario	Expected Result
9		





Unit: 50000 Asset ID: 0000049004 2003 Parker Chapel Church Jan 200564 Job Period

[Change Location](#)

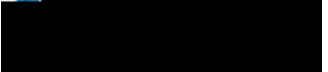
of 2 Last Book Find | View All First 1

ALL ASSETS All Assets Page Currency: USD Convention Actual Month Book Name

[Edit Cost Information](#)

Cost Curr: USD Anlv Adjust All Rows Percent Quantity

Salvage Category Cost Type Unit Quantity Cost



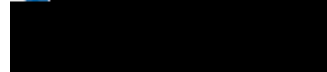


	Test Scenario	Expected



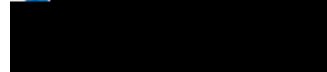


	Test Scenario	Expected Result
11	<p>Perform a Book Adjustment to an asset to change its useful life. Use the Life to Date convention and a January accounting date.</p> <p>Asset Management AEAsset Transactions AEAsset Book Information AEDefine Tax/ Depr Criteria</p>	





	Test Scenario	Expected Result
14	<p>Run Month End processes for January:</p> <p>Depreciation Calculation Asset Management AEDepreciation AProcessing</p> <p>Accounting Entry Creation Asset Management AEAccounting Entries</p> <p>Depreciation Close Asset Management AEAccounting Entries</p>	Entries posted to Dist_Ln



Generate Capital Ledger Journals for January

Retrofit any queries

High level validation

BOR_AM_ASSET_AP_TO_AM_LOAD (formerly
the BORQM002 query) -- optional

-

you may not have any items to load.

Security has not changed for AM, but please
verify that all your AM users have access to
the menu items they were expecting to see.

