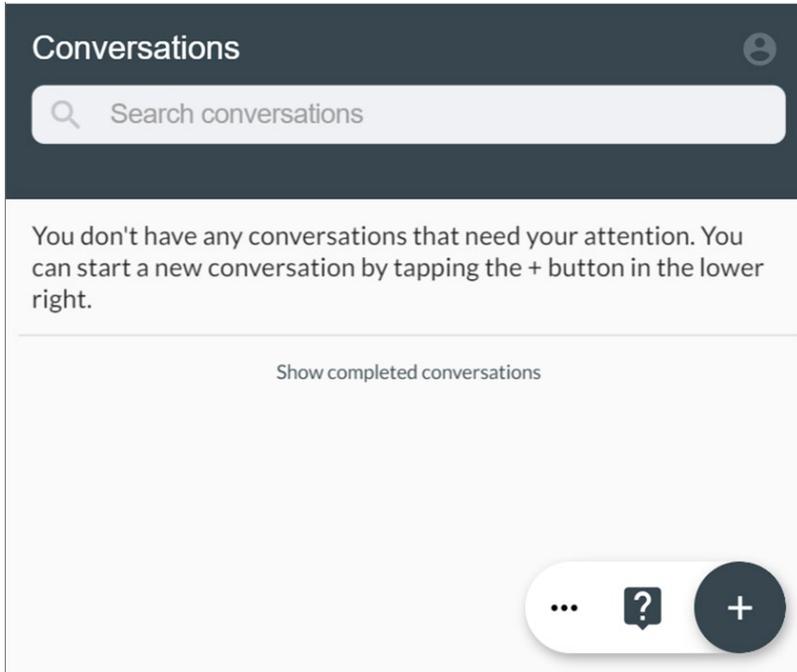


UNM INVENTORY ASSISTANT/AppTree



The UNM Inventory Assistant/AppTree can be accessed through a tile on the University's myUNM staff page. The AppTree-UNM Inventory Assistant tile will be the starting point for the Inventory Assistant/AppTree.

The Inventory Assistant/AppTree is used by University departments to conduct the annual physical inventory of computers, drones and capitalized equipment as required by New Mexico State statute and by the Federal Government. The UNM Inventory Assistant/AppTree can also be used to Transfer an Asset, Dispose of an Asset, Check out an Asset and Find an Asset.

The Inventory Assistant/AppTree is designed in an app format and uses conversations to create transactions that are routed through workflows for approvals. Department Inventory Contacts (IC) will start a conversation. Upon completion by the Inventory Contact the transaction will route to the Department Dean, Director or Chair (DDC) for approval. The transaction will then route to additional offices including Property Accounting for review.

••• The three dots in the lower right corner are used for selecting the Asset Assistant/AppTree for production.

 The question mark is used to access the Help Assistant to setup a mobile device such as a smart phone or tablet.

 The plus sign is used to start a new conversation.

 This blue icon is used to submit information that has been entered.



Hello! I'm your **UNM Asset Assistant**.
What would you like to do?

Transfer an asset

Check out an asset

Dispose of an asset

Find an asset



External transfer requests for assets capable of data storage are subject to the UNM Data Security Certification policy. Please read the certification document found [here](#) and certify that this asset is in compliance

I have read the UNM Data Security Certification and certify that the asset I'm transferring is in compliance

I'm not able to certify that this device is in compliance.
Remove the device from this asset request

Inventory Contacts can select from the following options: **Transfer an asset** (internal or external), **Check out an asset** (required to take equipment offsite from UNM location), **Dispose of an asset** (Surplus Property disposal or Request for Deletion – RDA) or **Find an asset** (research an asset and update some attributes related to the asset).

Select [Transfer an asset](#)

Select [Transfer an asset to an external entity](#)

Select [Add an asset](#). If using a smart phone or tablet you can scan the asset tag or select [Enter barcode ID](#). Type the barcode (for example N00065856) and select Done.

A message will be displayed that indicates External transfer requests for assets capable of data storage are subject to the UNM Data Security Certification policy. Please read the certification documentation found [here](#) and certify that this asset is in compliance.

Select the statement that applies to this asset. Option 1: [I have read the UNM Data Security Certification and certify that the asset I'm transferring is in compliance](#)

OR

Option 2: [I'm not able to certify that this device is in compliance. Remove the device from this asset request.](#)

Attributes of the asset will be displayed. Verify the information is correct for the asset you are transferring to an external entity.

Required information to submit the External Transfer request is **Provide a business purpose for the transfer of this asset to the receiving entity**, **Enter the receiving entity name and contact information** and **Set transfer date**.

Note that multiple assets can be submitted together and that they can use the same required information or the Inventory Contact can provide details specific to each asset being transferred.

Any needed attachments can be added to the conversation.

Add another asset

Provide a business purpose for the transfer of this asset to the receiving entity

Enter receiving entity name and contact information

Set transfer date

If you are submitting this for someone else, enter the person's Name or Banner ID

View, update or cancel this request

View & edit attachments

Submit this external transfer request

Select [Provide a business purpose for the transfer of this asset to the receiving entity](#). Provide a business purpose for the external transfer. Press enter or select the blue icon.

Select [Enter receiving entity name and contact information](#). Press the blue arrow to enter the information. Type the name of the receiving company or entity. Press enter. Enter the name of the Person responsible for receiving the asset. Press enter. Enter the Receiving contacts telephone number. Press enter. Enter the Receiving contacts email address. Press enter.

Select who is responsible for the cost of transferring this asset – [The University of New Mexico](#) or the [Receiving party](#).

Select [Yes](#) or [No](#) for Will the assets be sold to the receiving entity?

Select [Set transfer date](#) and select the date that the asset will be transferred to the new entity. Then select Set.

Select [Submit this external transfer request](#). Note a transaction identifier is created.

Approval routing for external transfers: Inventory Contact (IC) for department that is transferring the asset, then Dean, Director or Chair (DDC) for that department, then Core Office, the Chief Procurement Officer, then Controller and then the Core Office for final processing.

From: support=apptreesoftware.com@notification.apptreesoftware.com
[mailto:support=apptreesoftware.com@notification.apptreesoftware.com]
On Behalf Of support@apptreesoftware.com
Sent: Wednesday, September 9, 2020 1:49 PM
To: Patrick Burwinkle <pburwink@unm.edu>
Subject: An asset EXTERNAL TRANSFER request requires your approval

An email notification will be sent from the Inventory Assistant/AppTree notifying the Inventory Contact (IC) for department that is transferring the asset, then Dean, Director or Chair (DDC) for that department, then Core Office, the Chief Procurement Officer, then Controller and then the Core Office for final processing.

Approval by the Dean, Director or Department Chair is required for external transfer. Submitted by Patrick Burwinkle on 09/09/20 at 11:48 AM for N00065823 - Computer/PrecisionT3420 [Click here to view](#)