UNM INVENTORY ASSISTANT/AppTree

The UNM Inventory Assistant/AppTree can be accessed through a tile on the University's myUNM 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.
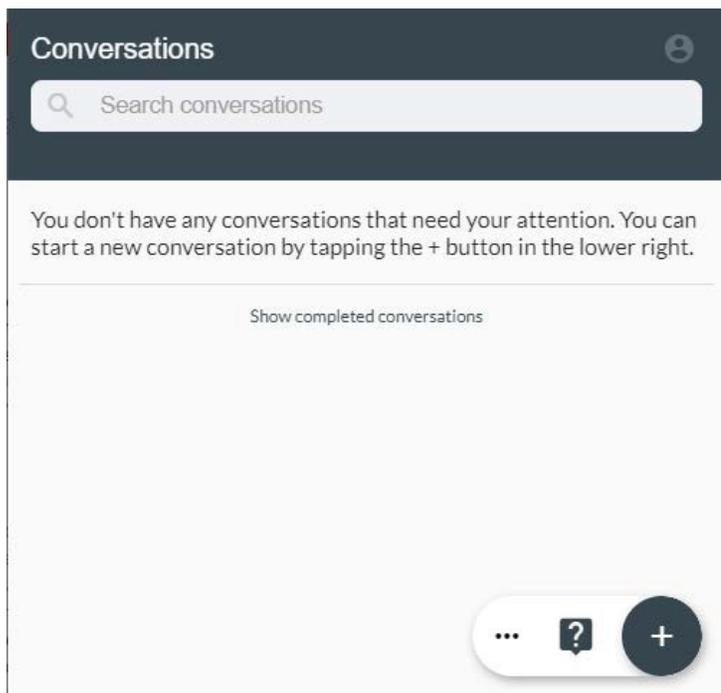
The three dots in the lower right corner are used for selecting the Asset Assistant/ AppTree for production.

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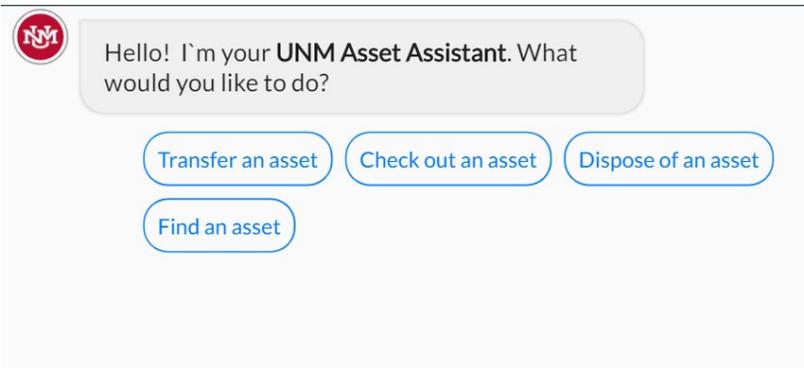
Inventory Contacts can select from the following options: **Transfer an asset** (internal or external), **Check out an asset** (required to take equipment offsite from UNM location), **Dispose of an asset** (Surplus Property disposal or Request for Deletion – RDA) or **Find an asset** (research an asset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

Select   Transfer an asset

Select   Transfer an asset internally within UNM

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.

Attributes of the asset will be displayed. Verify the information is correct for the asset you are transferring to another UNM department.

Required information to submit the Internal Transfer request is **Explain why your department will not use this asset anymore**, **Enter the receiving department's 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.

What would you like to do next with your request?

- Add another asset
- Explain why your department will not use this asset anymore
- Enter receiving department's 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 internal transfer request

Select Explain why your department will not use this asset anymore. Provide a business purpose for the internal transfer. Press enter or select the blue icon.

Select Enter receiving department's information. Press enter.

Provide the name of the person in the receiving department who will be the contact.

Select Enter receiving department's information. Enter the Org Code or department name to select from the list. Search for the user name of the individual or Inventory Contact in the receiving department.

Select Set transfer date and select the date that asset will be transferred to the new Org Code. Then select Set.

Select Submit this internal transfer request. Note a transaction identifier is created.

Approval routing for internal transfers: Inventory Contact (IC) for department that will no longer use the equipment, then Dean, Director or Chair (DDC) for that department, then receiving department IC, then receiving department DDC, then Property Accounting and finally the receiving department IC to acknowledge receipt of assets and to update the building and room where the assets are maintained. This final steps updates both department inventories to reflect the transfer.

support=apptreesoftware.com@notification.apptreesoftware.com on behalf of support@apptreesoftware.com

An asset INTERNAL TRANSFER request requires your approval

An email notification will be sent from the Inventory Assistant/AppTree notifying the Inventory Contact, the DDC and the core offices that a transaction requires their review.