COMMUNITY AND TECHNICAL COLLEGES
Washington State Board

ctcLink

Financials and Supply Change Management Image 53 Overview

CONTENTS

Introduction

The Image/Upgrade Overview Document is intended to provide ctcLink users with a summary of the changes that will be made in the system as a result of the upcoming image or PeopleTools upgrade implementation. Oracle releases multiple PeopleSoft updates, called images, for each pillar every year. Each Image contains bug fixes and features that are important for PeopleSoft to work well. PeopleTools upgrades update the underlying framework of the system. There are minimal changes that are noticeable to the end users. Below is an overview of the changes that you can expect to see as part of this upgrade.

Purchasing

Multiple Attachments

Header and Line Comments and Attachments now allows up to 10 attachments at one time.

Image: Sample Screenshot of Multiple Attachments

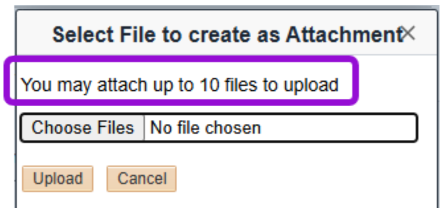


Image: Sample Screenshot Showing Multiple Files are Ready to be Uploaded

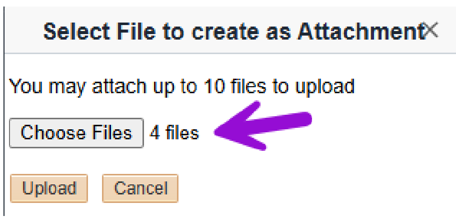
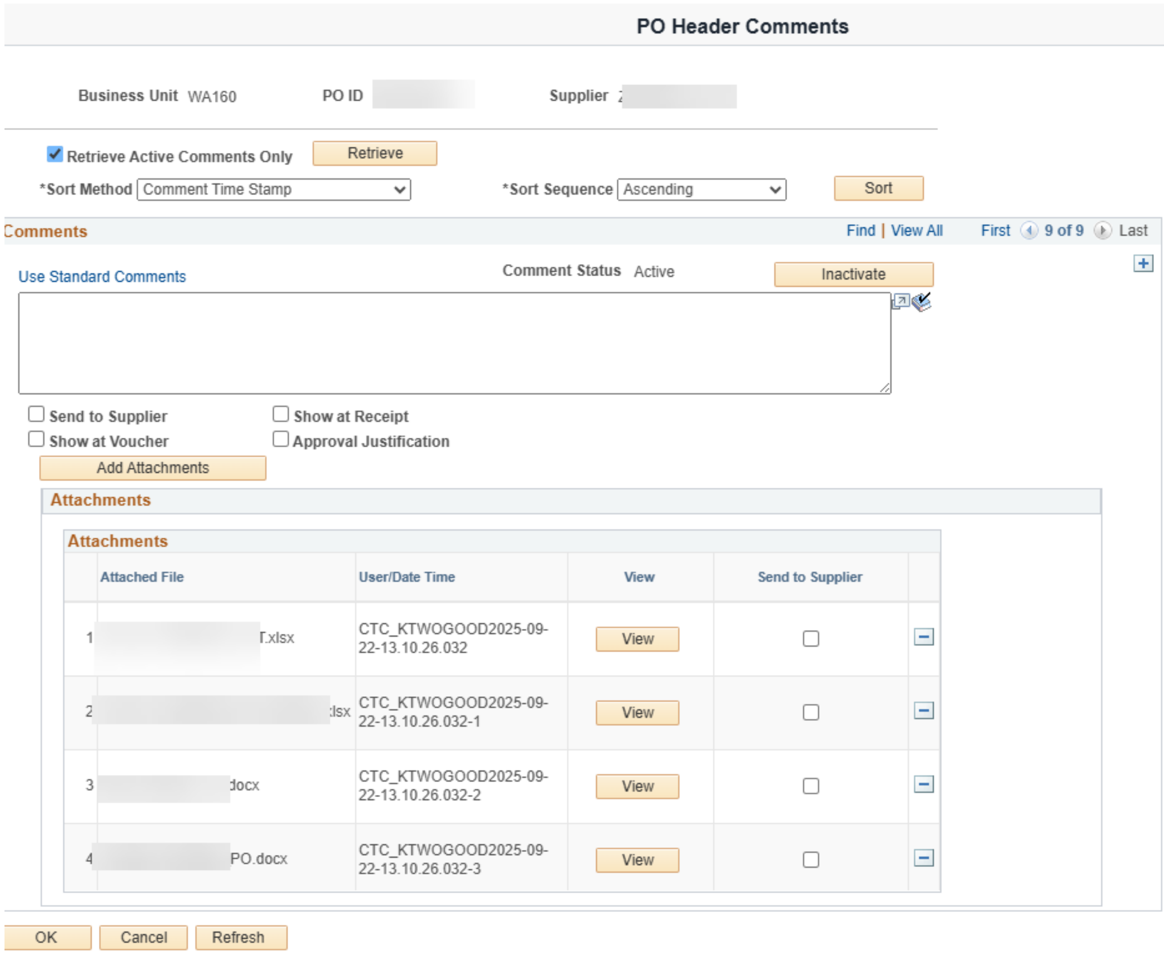


Image: PO Header Comments Page Showing Multiple Attachments



QRG

[Splitting and Updating Transaction Lines](#)

Purchase Order Dispatch Email

Currently email comes from a generic system generated email.

Peoplesoft + fsprd@sbctc.edu

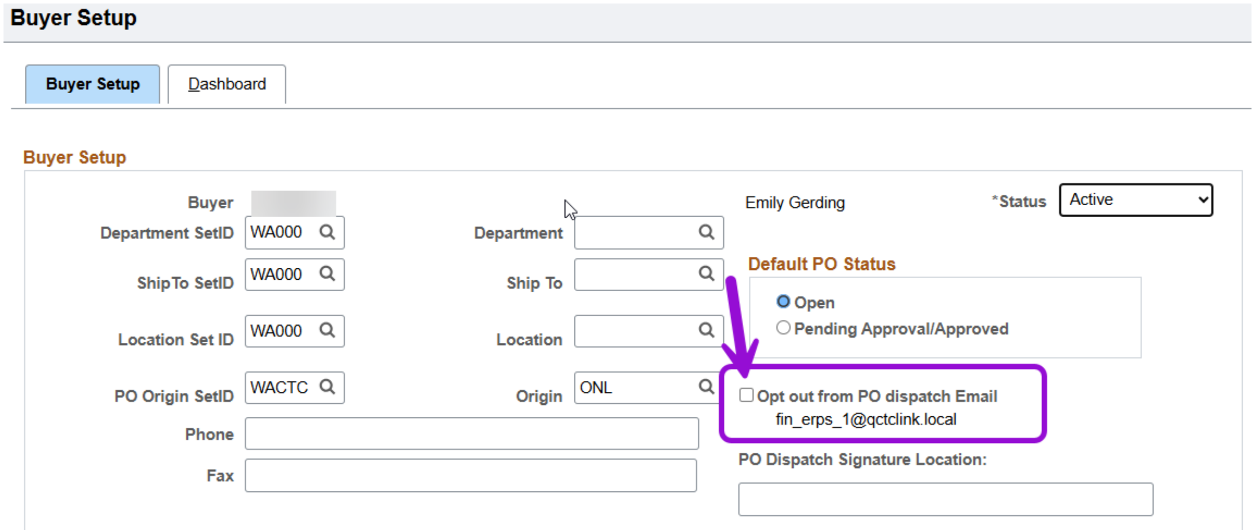
New feature allows 2 new things to happen:

1. Copy of email will be automatically sent to Buyer AND this can be opted out of in the Buyer Setup (college controlled)

Navigation

Set Up Financials/Supply Chain > Product Related > Procurement Options > Buyer Setup

Image: Buyer Setup Page Showing Opt Out Option Checkbox



2. The email that shows when dispatched, the "FROM" email, can now be set to be the system default (as it is now and will remain the default), the Buyer's email, or a BU specified generic email. Each college can choose to select to change from the system default to either the Buyer's Email or a BU specified generic email. A ticket will be required to request ERP Customer Support make the configuration change.

Image: System Default When Opt Out from PO Dispatch Email

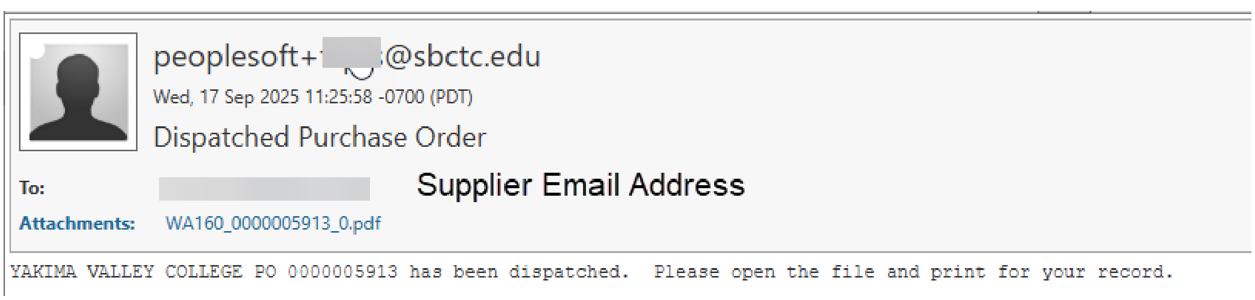


Image: Buyer's Email When You Choose to Receive PO Dispatch Email

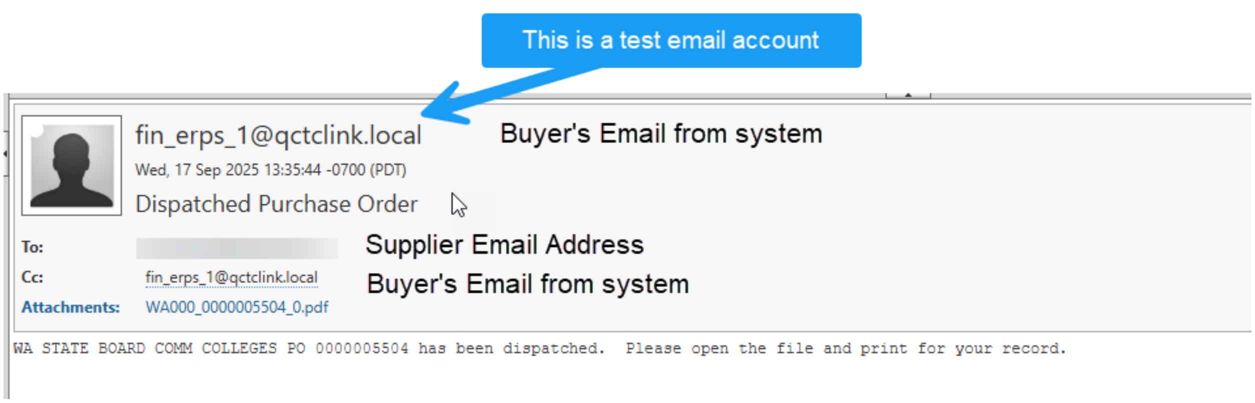
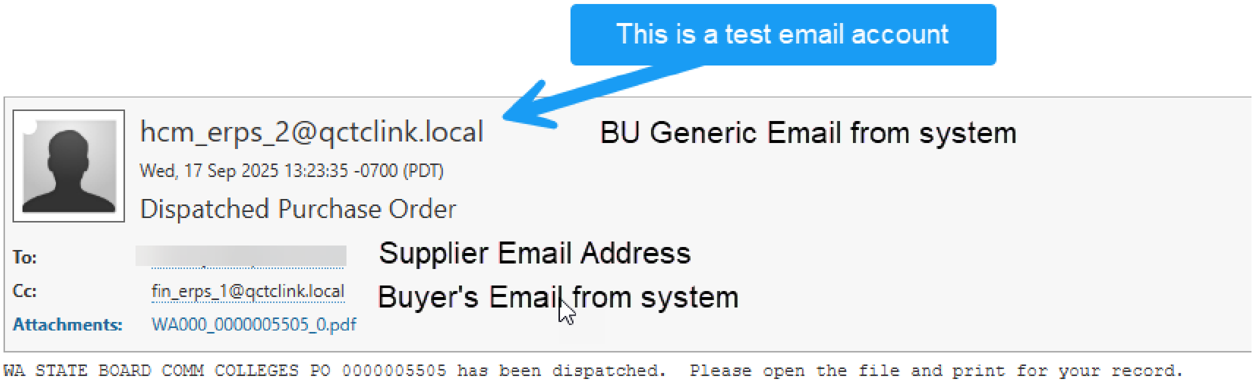


Image: Email When You Choose to Receive a Generic Email



Example would be: Purchasing@sbctc.edu. Just needs to be an existing email account.

This is a configurable change that will be done by Purchasing ERP Customer Support upon request via ticket.

Image: Define Dispatch Options

The configuration for the Buyer's Email or BU specified option is done in Define Dispatch Options (not available to the college users).

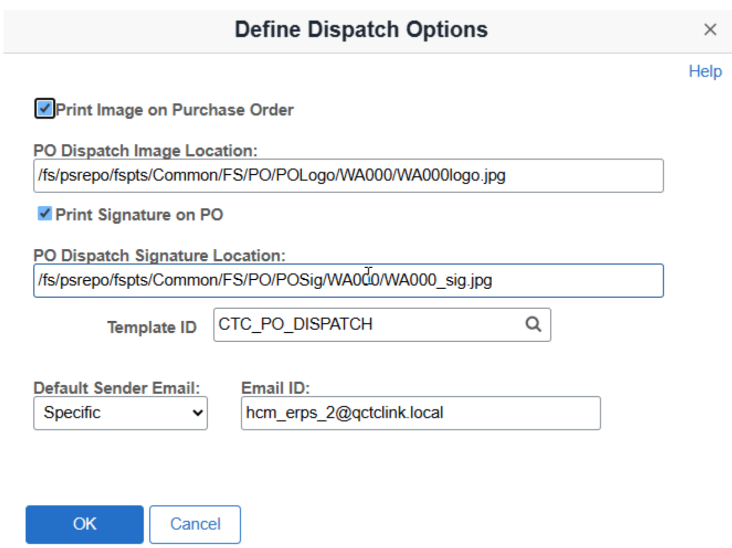
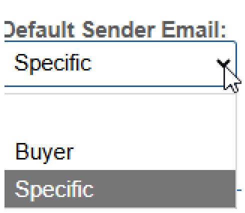


Image: Default Sender Email Dropdown

Default Sender Email drop down choice by Business Unit. Request will need to be approved by appropriate college leadership.



QRG

[Batch Dispatch Purchase Orders]

Auto Sourcing Requisition

For those that use this tool for auto sourcing requisitions to purchase orders, due to an issue with additional processing options, those options will no longer be available. We found that when selecting additional processing options such as run budget check, that the entire processes errors and results in locked requisitions and purchase orders.

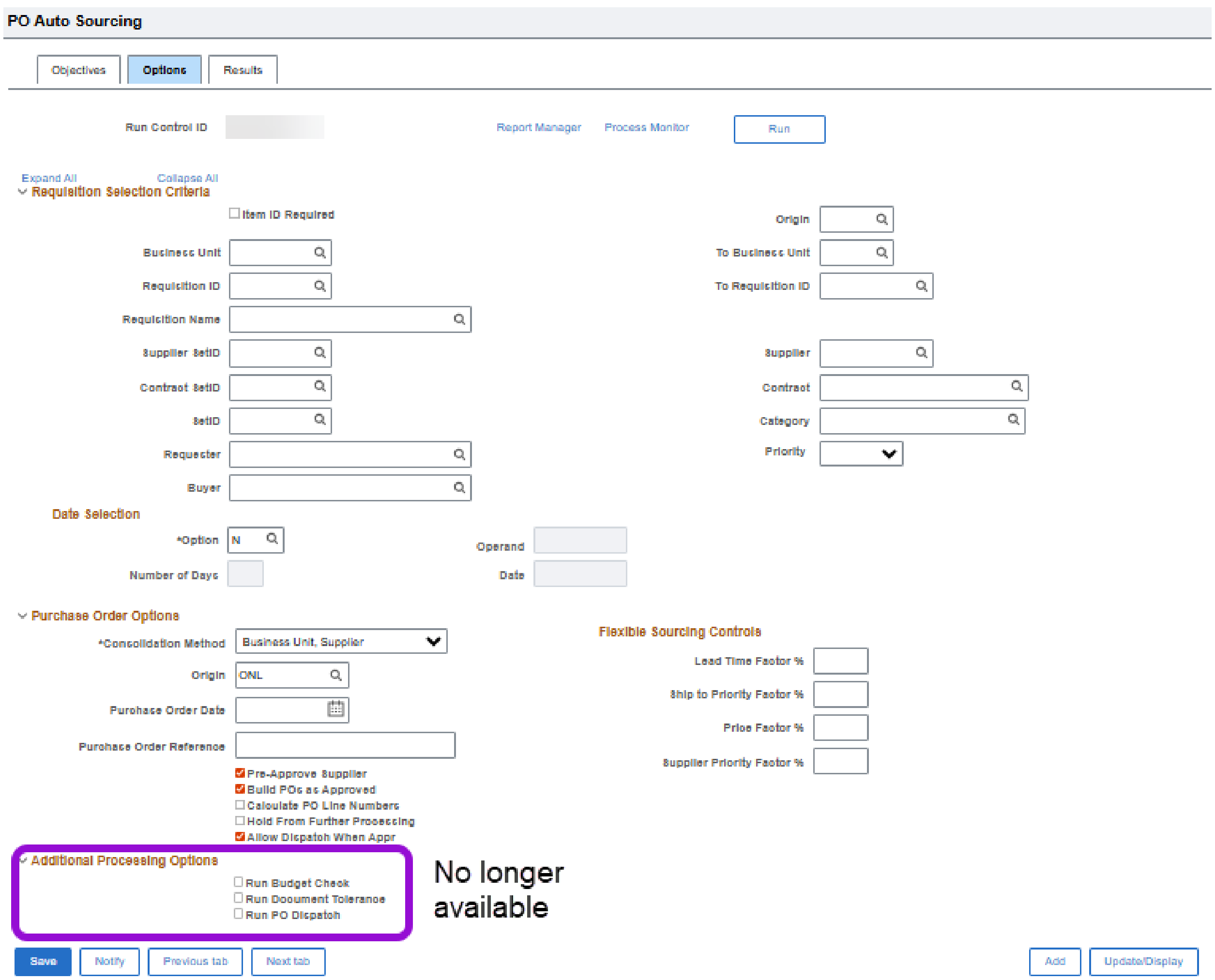
<u>This change will **REQUIRE** a new run control to be created when using this process.</u>

No other changes to the QRG or process.

Navigation

Menu > Purchasing > Purchase Orders > Stage/Source Requests > PO Auto Sourcing

Image: Before Screenshot of the PO Auto Sourcing Page Showing Additional Processing Options are Available



QRG

[Sourcing Requisitions, Auto Sourcing Requisitions](#)

New Feature - Requisition Approver View Comments and Attachments

Approvers are now able to view comments and attachments when approving a requisition.

Navigation

Fluid > Approvals Tile

Image: Requisition Fluid Approval Page

Select a Requisition that is to be approved. Under More Information is the Header Comments and attachments link. Select link to view comments and attachments in the header of the Requisition.

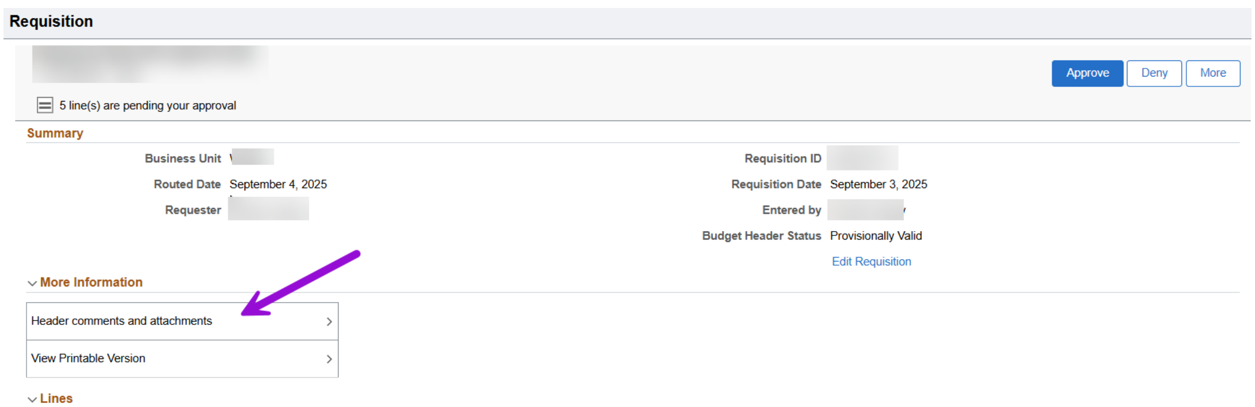


Image: Requisition Attachments

The text heading of the comment states comment 1 even though it is an attachment.

Image: Requisition Approval Page

To view line comments and attachments, select line to be reviewed and then select Line comments and attachments link.

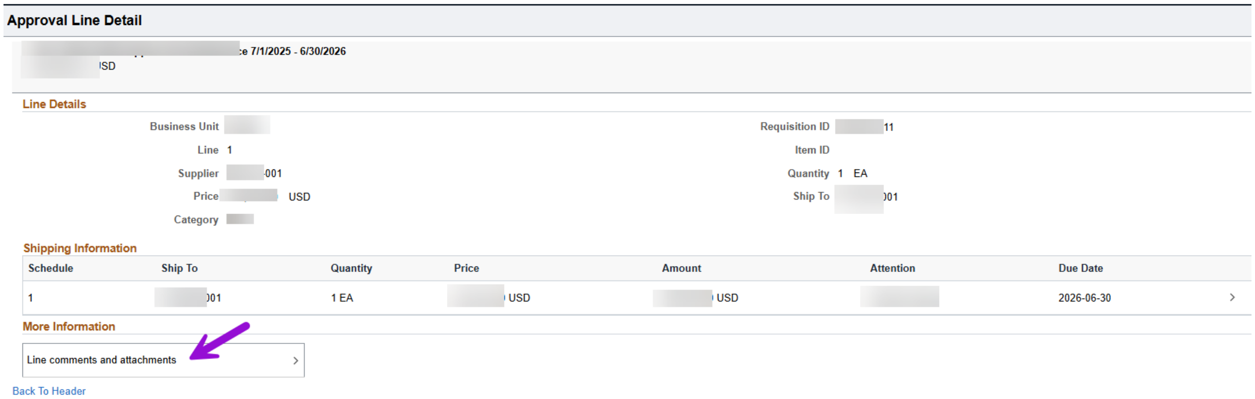
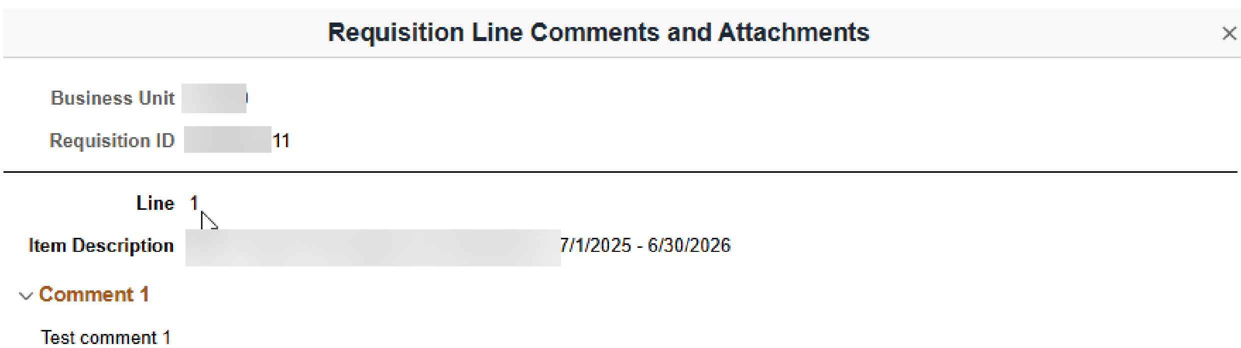


Image: Requisition Comments

The text heading of the comment states comment 1.



QRG

[Process Requisition Approvals]

New Feature - Purchase Order Approver View Comments and Attachments

Approvers are now able to view comments and attachments when approving a purchase order.

Navigation

Fluid > Approvals Tile

Select a Purchase Order that is to be approved. Under More Information is the Header Comments and attachments link. Select link to view comments and attachments in the header of the Purchase Order.

Image: Purchase Order Fluid Approval Page

Select a Purchase Order that is to be approved. Under More Information is the Header Comments and attachments link. Select link to view comments and attachments in the header of the Purchase Order.

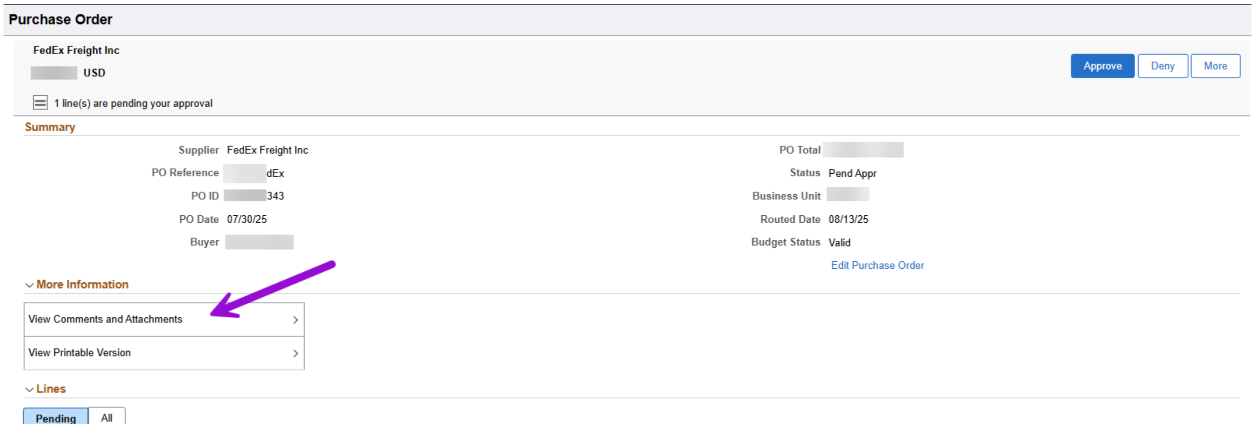


Image: Purchase Order Comment

The text heading of the comment states Group box whether it is a comment or attachment.

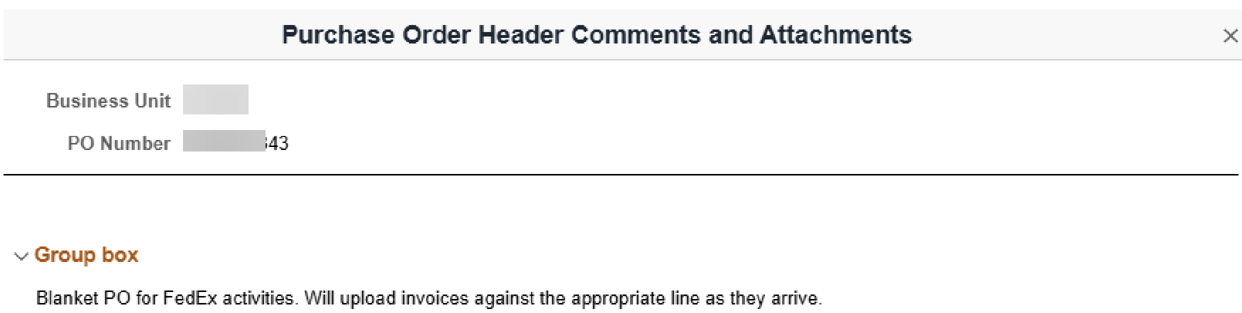


Image: Purchase Order Approval Page

To view line comments and attachments, select line to be reviewed and then select Line comments and attachments link.

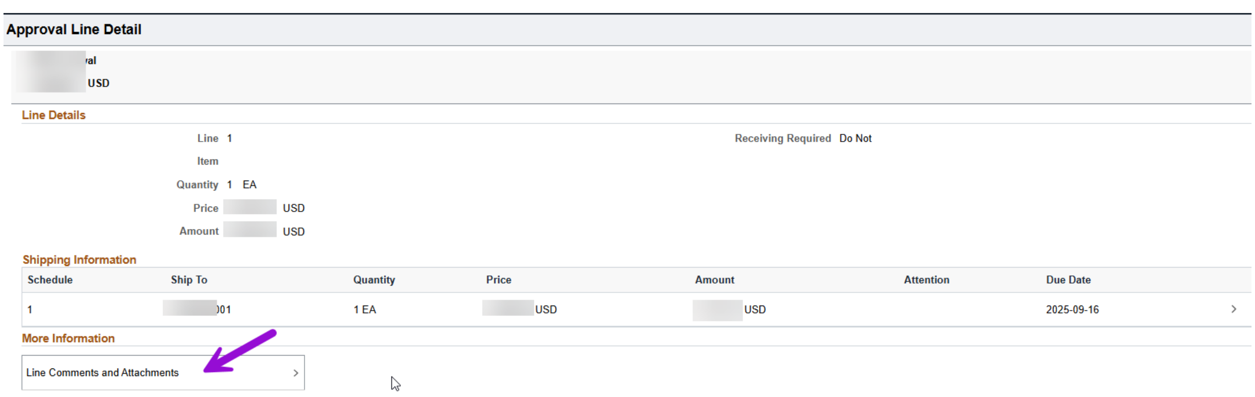


Image: Purchase Order Attachments

The text heading of the comment states Group box whether it is a comment or attachment.

QRG

[Process PO Approvals]

Travel and Expenses

Fluid Travel Authorization Creation Page Updates

Enhanced the Fluid Travel Authorization Creation page by adding the following: Expense Type Date Column, Expense Type Location Column, View Printable Version link added to the left side of the header, Notes link added to the left side of the header and a Gear icon added to right top of the expense details section, which is used to access the Grid settings (customize the expense details columns and sort order). The Create Cash Advance link was moved to the left side of the header.

Navigation

Employee Self Service Fluid Home Page > Expenses > Create Travel Authorization

Image: Fluid Travel Authorization Creation Page

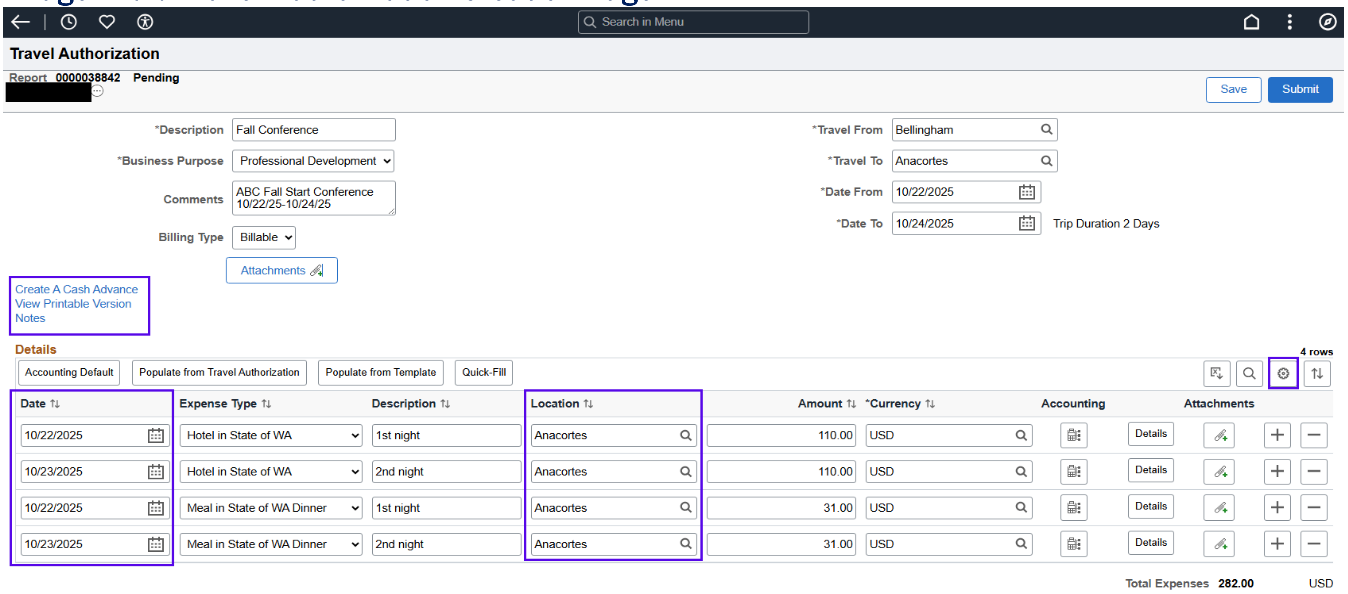
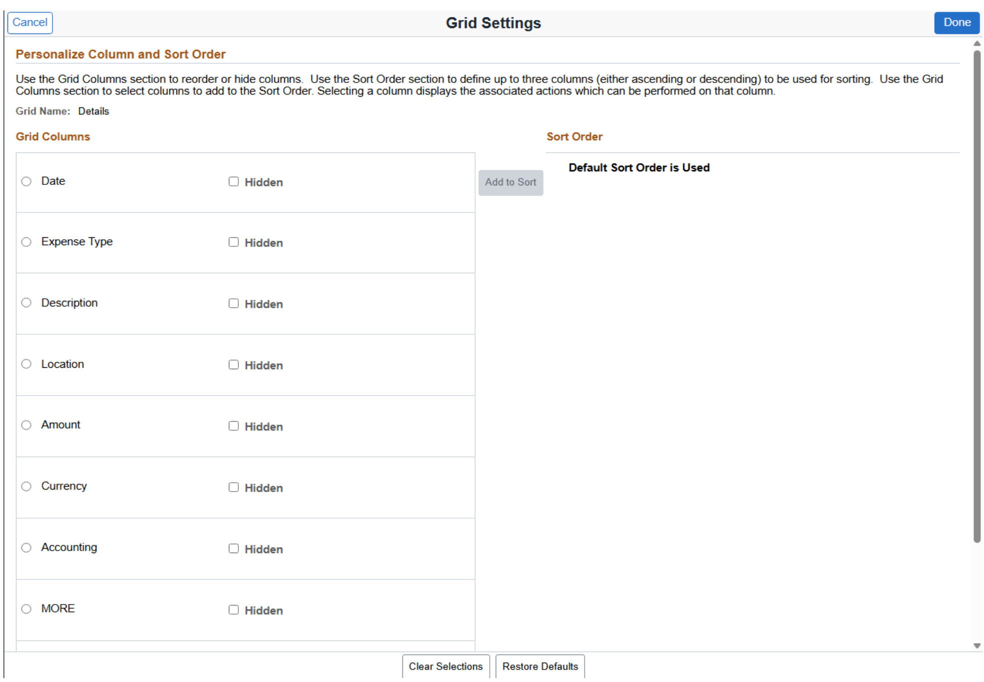


Image: Gear Icon, Grid Settings Menu



QRG

[Creating Travel Authorizations]

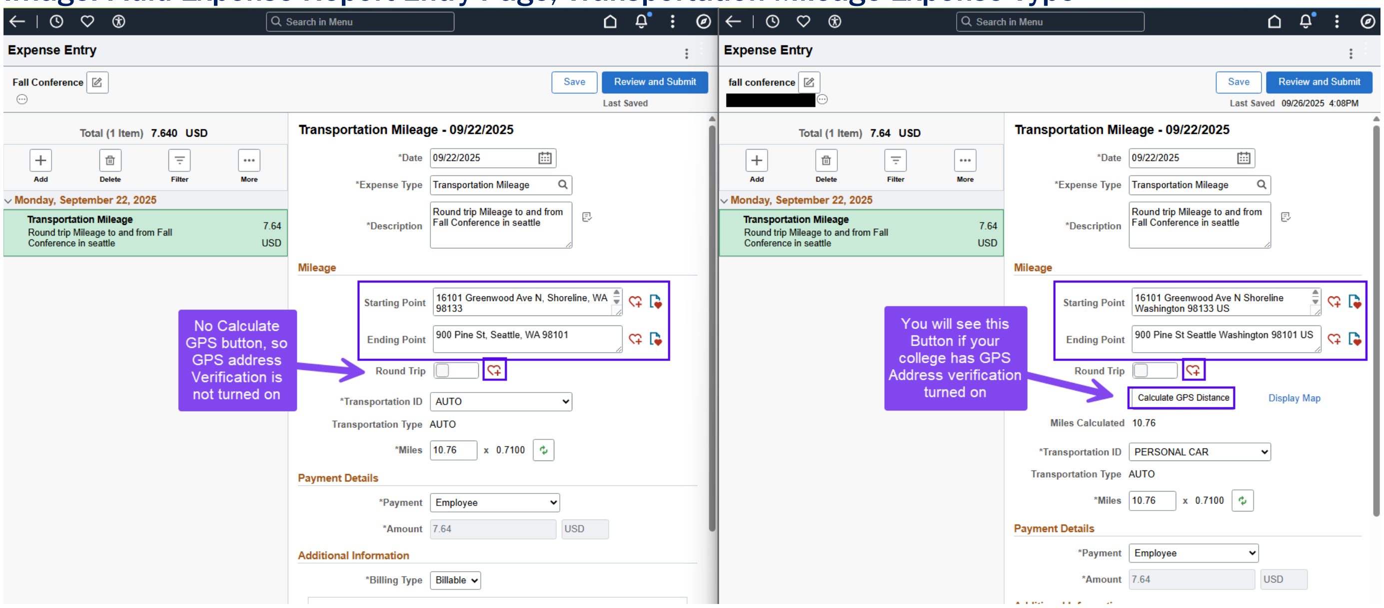
Fluid Expense Report, Transportation Mileage Favorites

Enhanced the Fluid Expense Report Creation page by adding new Favorites functionality to the Transportation Mileage Expense Type. **Add to Favorites** and **View Favorites** buttons are now available. As part of this enhancement, Address boxes will now be displayed for all users, even if your college doesn't have GPS Address verification turned on. The Address boxes are optional to use if your college doesn't have GPS Address verification turned on and are mandatory if it does.

Navigation

Employee Self Service Fluid Home Page > Expenses > Create Expense Report

Image: Fluid Expense Report Entry Page, Transportation Mileage Expense Type



QRG

[Create Fluid Expense Report]

Fluid Expense Report Approvals, Exception Comments

Enhanced the Fluid Expense Report Approval page by adding access to Exception comments when needed. If your local setup allows editing expense lines during approvals, and editing causes an exception, you can now add Exception Comments in Fluid Approvals.

Navigation

Navbar > Approval Tile > Expense Reports

Image: Fluid Expense Report Entry Page, Exception Comment Required

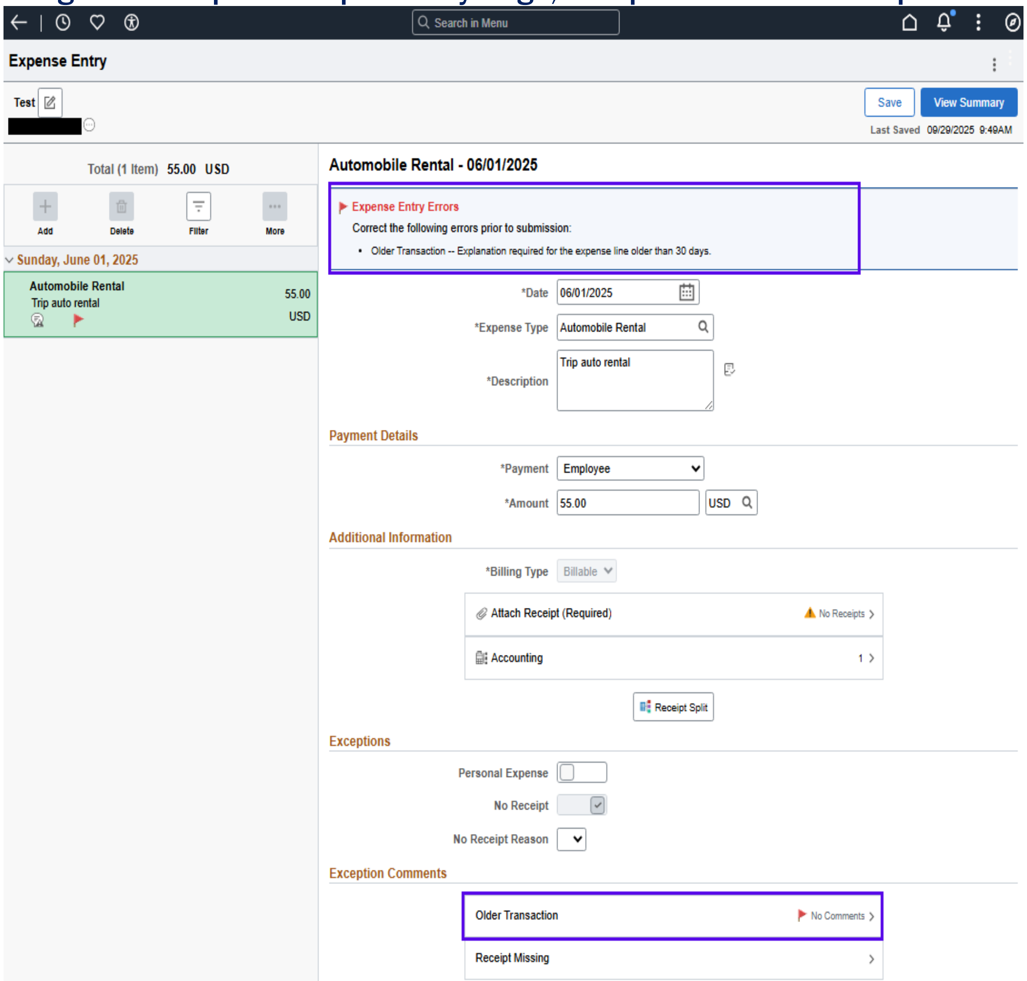
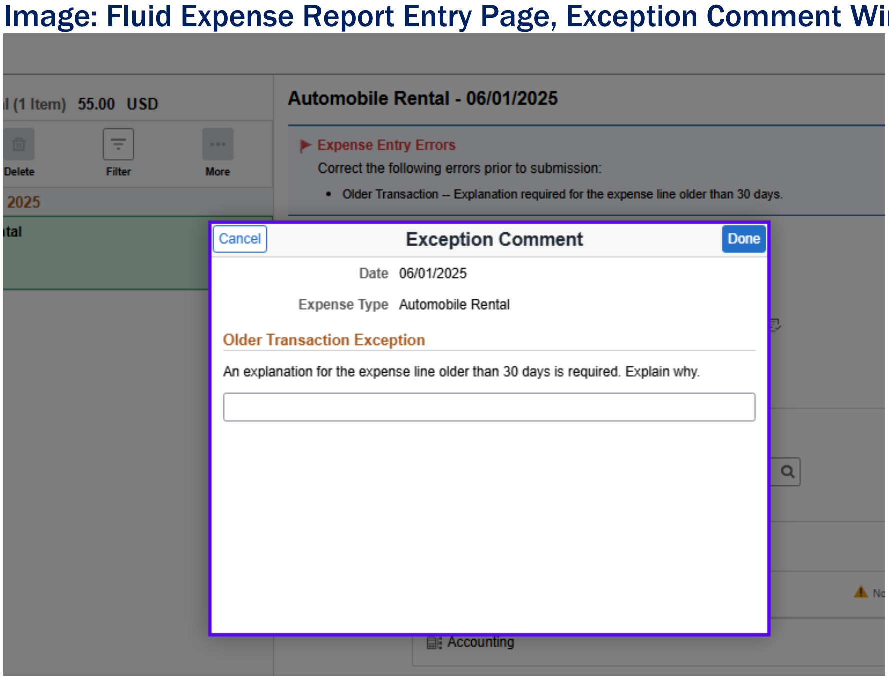


Image: Fluid Expense Report Entry Page, Exception Comment Window



QRG

[Completing Expense Report Approvals (Fluid)](#)

Fluid Expense Report Approvals, Receipt Value Functionality

Improved the Fluid Expense Report Approval Line Detail page so that the absence of a receipt is indicated correctly.

Navigation

Navbar > Approval Tile > Expense Reports > Approval Line Detail

Image: Fluid Expense Report Header Approval Page, Select the Expense Line

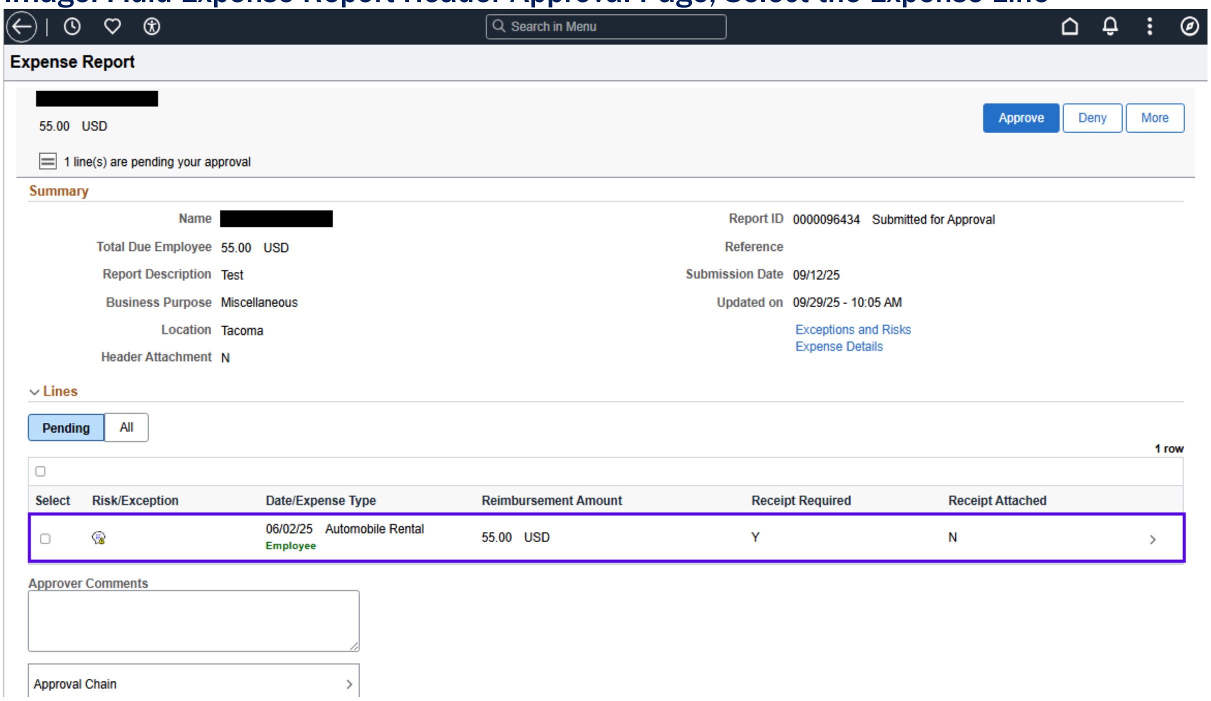
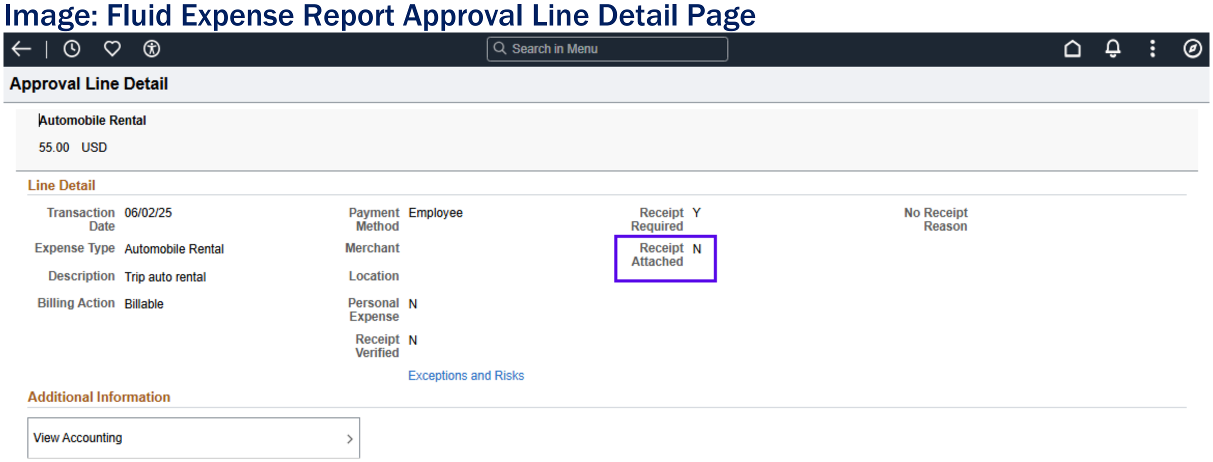


Image: Fluid Expense Report Approval Line Detail Page



QRG

[Completing Expense Report Approvals (Fluid)](#)

New Feature - Fluid Expenses Workcenter

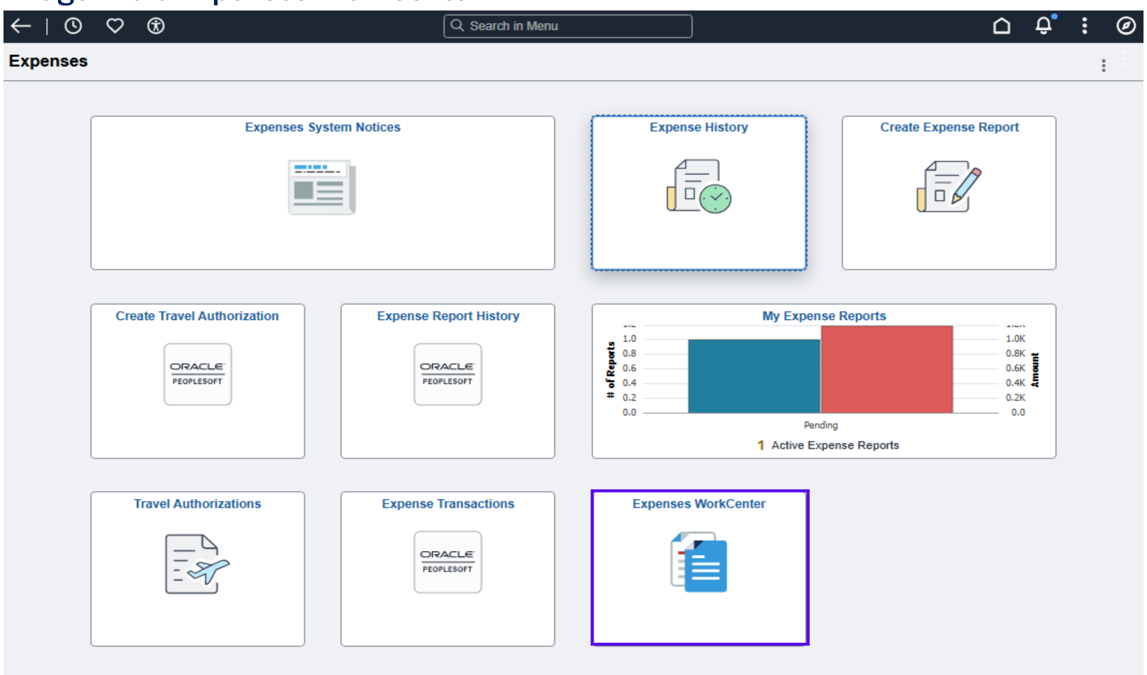
There is a new Fluid Expenses Workcenter that has all the pages from Travel and Expenses, reorganized into one Workcenter to help Travel Administrators stay organized. The Classic Expenses Workcenter has also been modified with these updates.

The Fluid Expenses Workcenter will migrate with the new image and will be located on the Fluid Expenses Homepage. If you already have a shortcut 'tile' for the Classic Expenses Workcenter on one of your homepages, you will need to manually add the Fluid Expenses Workcenter to the Fluid Expenses Homepage (or homepage of your choice).

Navigation

Fluid Employee Self Service Home Page > Expenses > Expenses WorkCenter

Image: Fluid Expenses WorkCenter



QRG

Using Expenses Workcenter (to be updated)

Project Costing

My Projects List

The limit of 50 projects that a user can have in their My Projects list has been removed.

Navigation

Project Management Homepage > My Projects fluid tile

QRG

Project Management Homepage

Customer Contracts

New Feature - Contracts Update Wizard

There is a new wizard that allows a user to update various parts of a grant award or a customer contract en masse. Items that can be updated include Assistance Listing Number (ALN), award reporting roles, award status, billing specialist, contract administrator, post-award administrator, and principal investigator. The most common use for this may be principal investigator as shown in the example below.

Navigation

Customer Contracts Fluid Homepage > Contract & Award Updates tile

Image: Contract & Award Updates Tile on the Customer Contracts Homepage

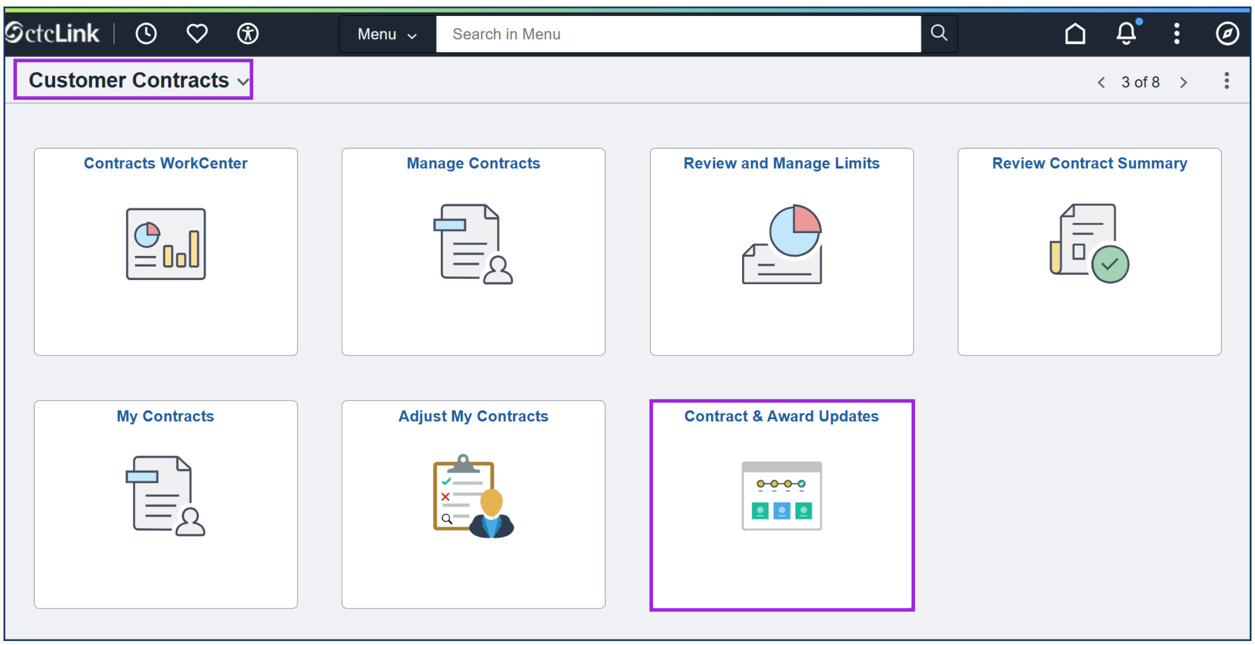


Image: Step 1 = Select Update Type

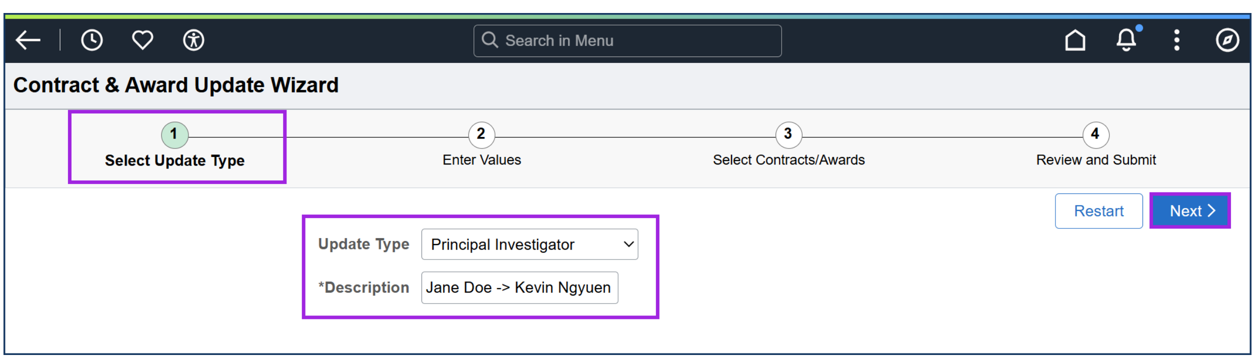


Image: Step 2 = Enter Values

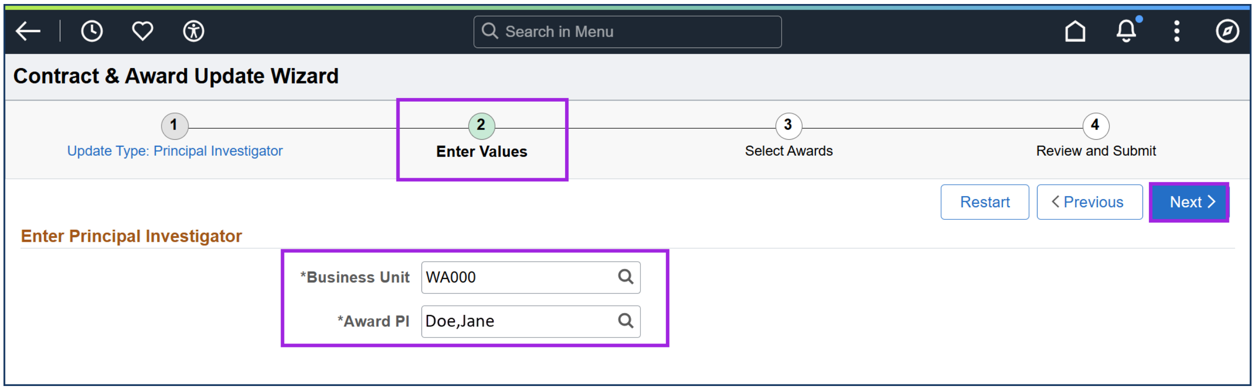


Image: Step 3 = Select Awards

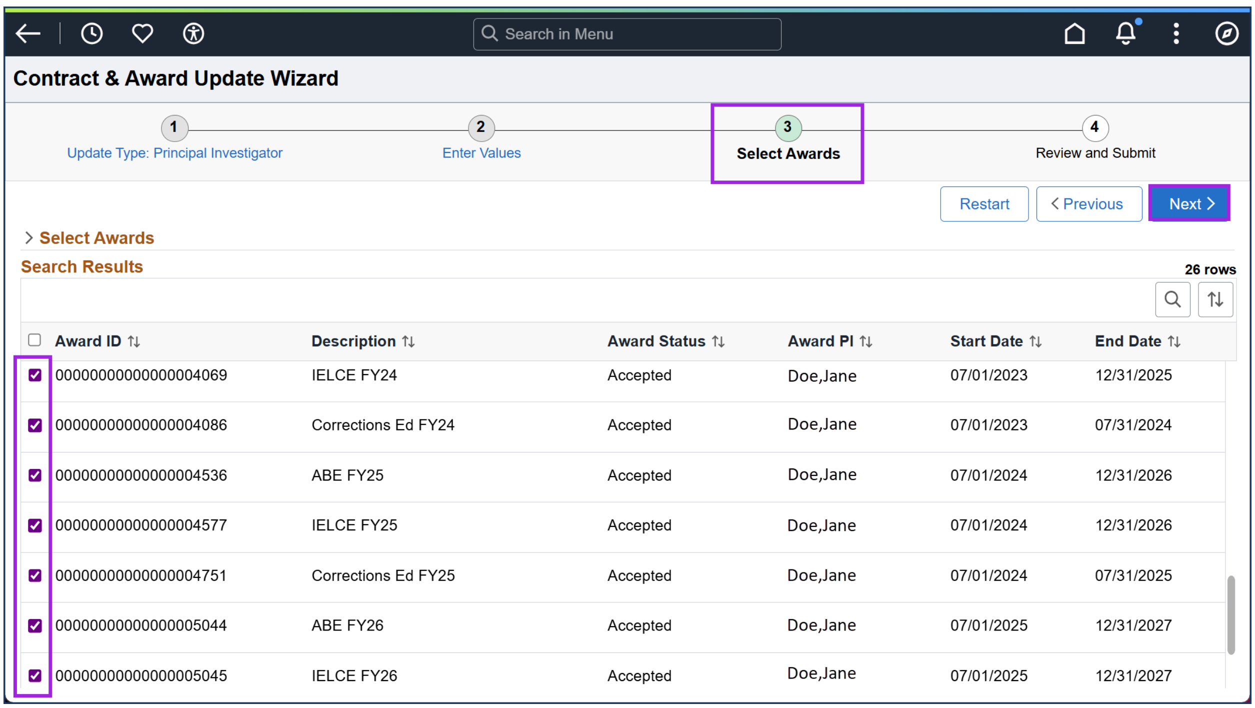


Image: Step 4 = Review and Submit

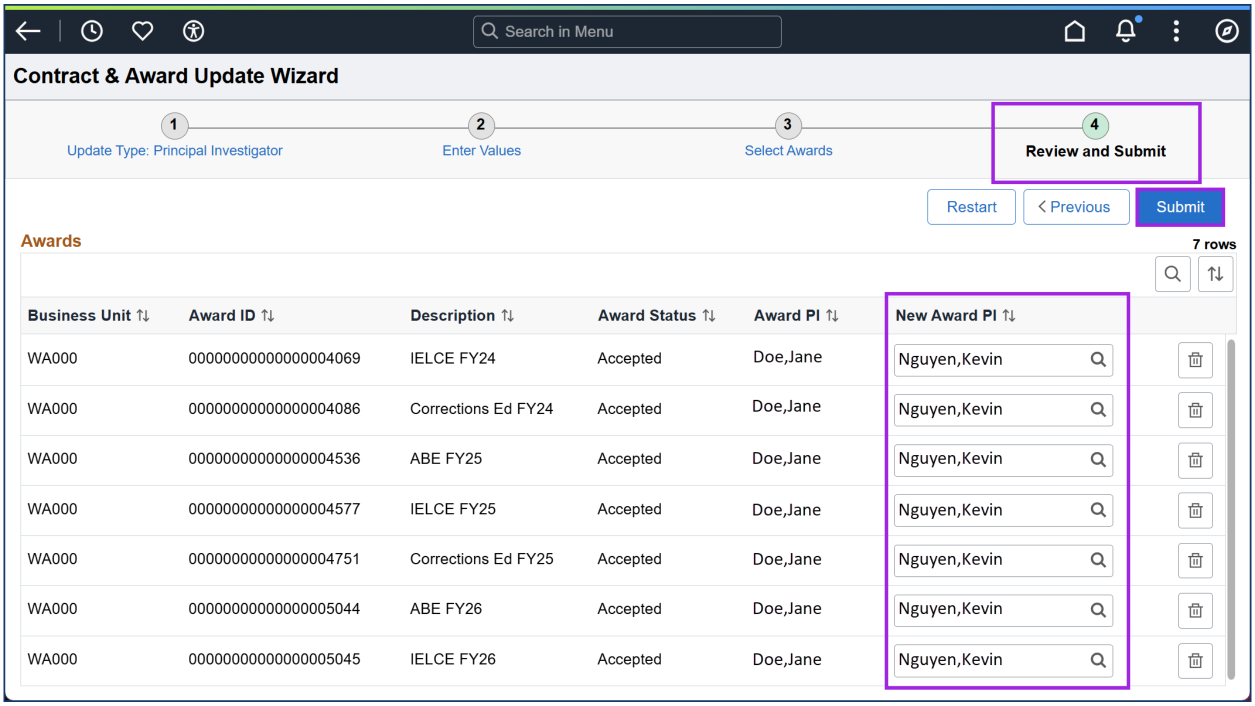
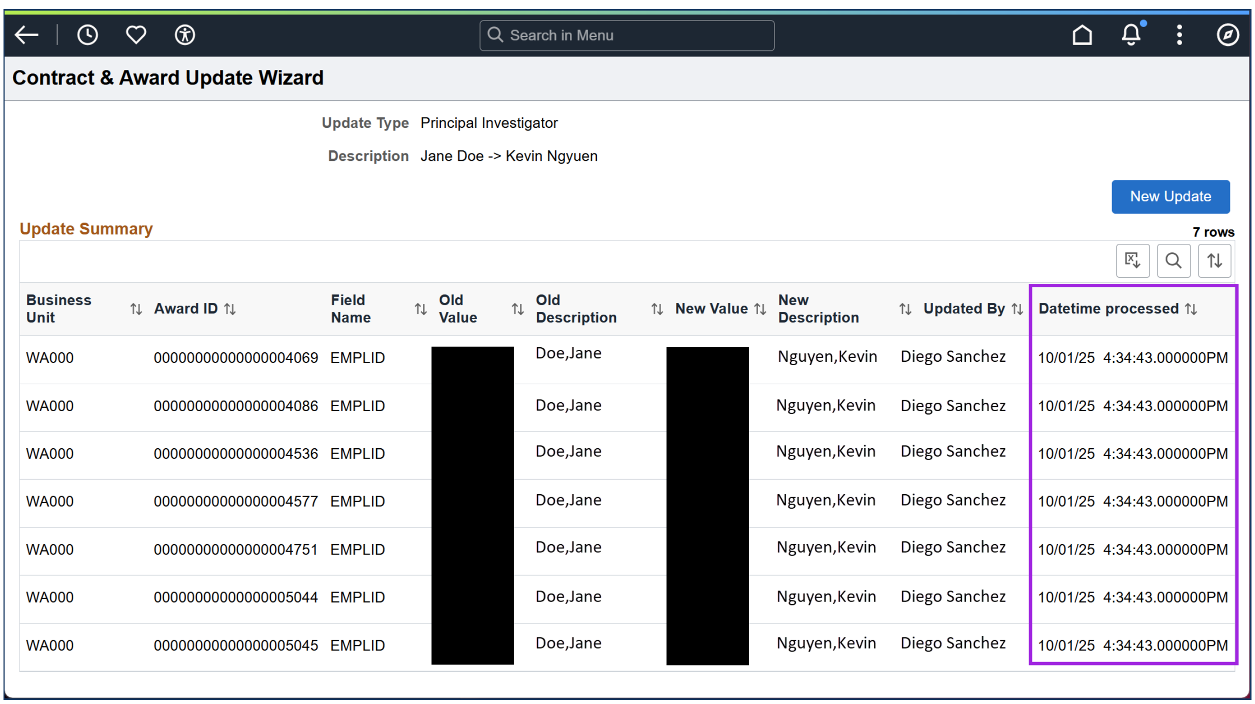


Image: Confirmation that changes were made



QRG

[Contracts Update Wizard]

Grants

Assistance Listing Number

The old federal term of Catalog of Federal Domestic Assistance (CFDA) has been updated to the new federal term of Assistance Listing Number (ALN) throughout the Grants module.

Navigation

Grants > Proposals > Maintaine Proposal

Grants > Awards > Award Profile

Image: Current Maintain Proposal Page with CFDA

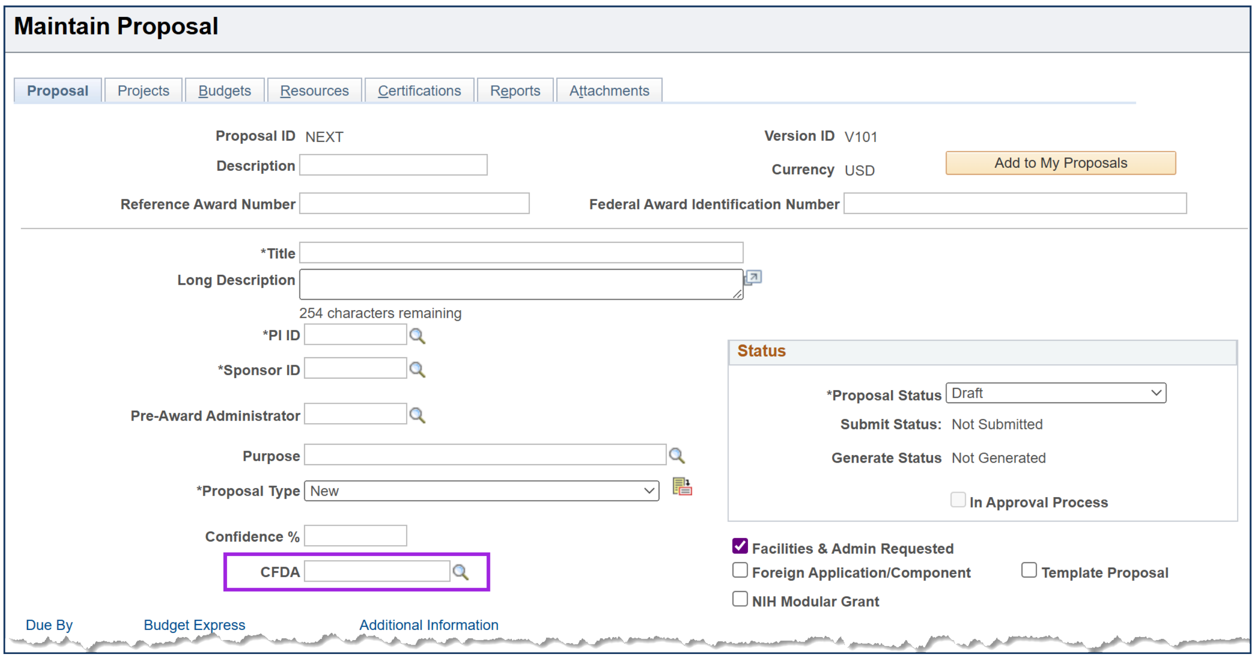


Image: Updated Maintain Proposal Page with ALN

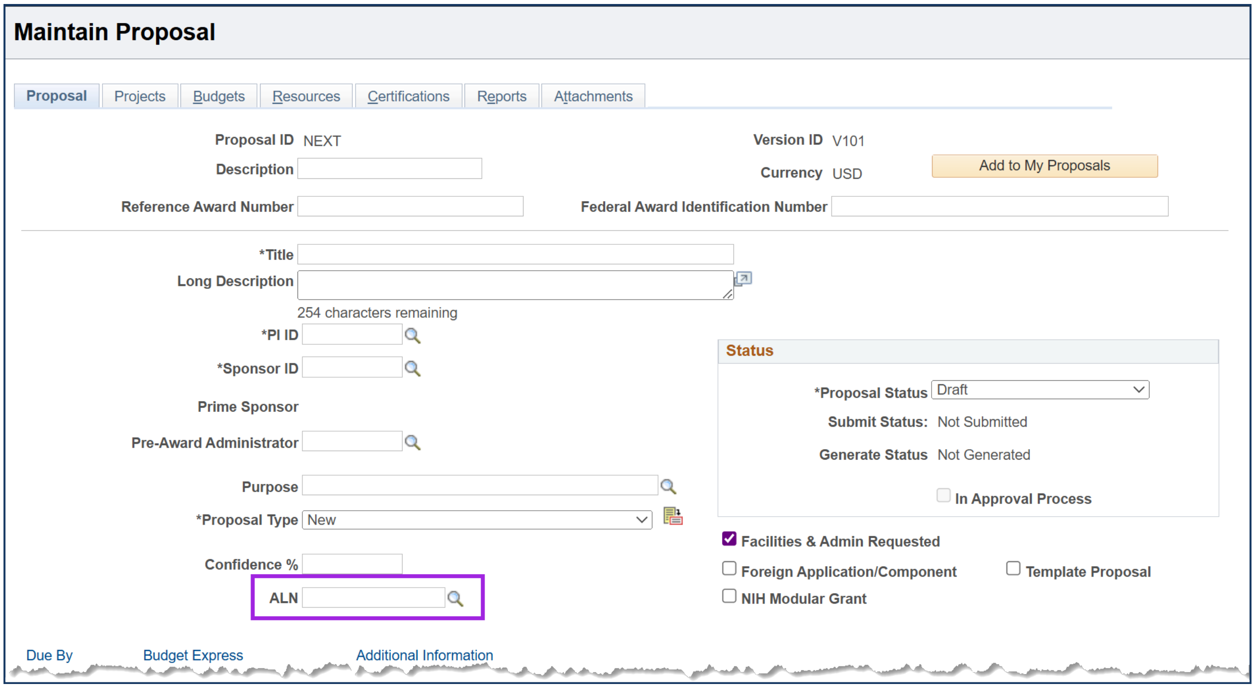


Image: Current Award Profile Page with CFDA

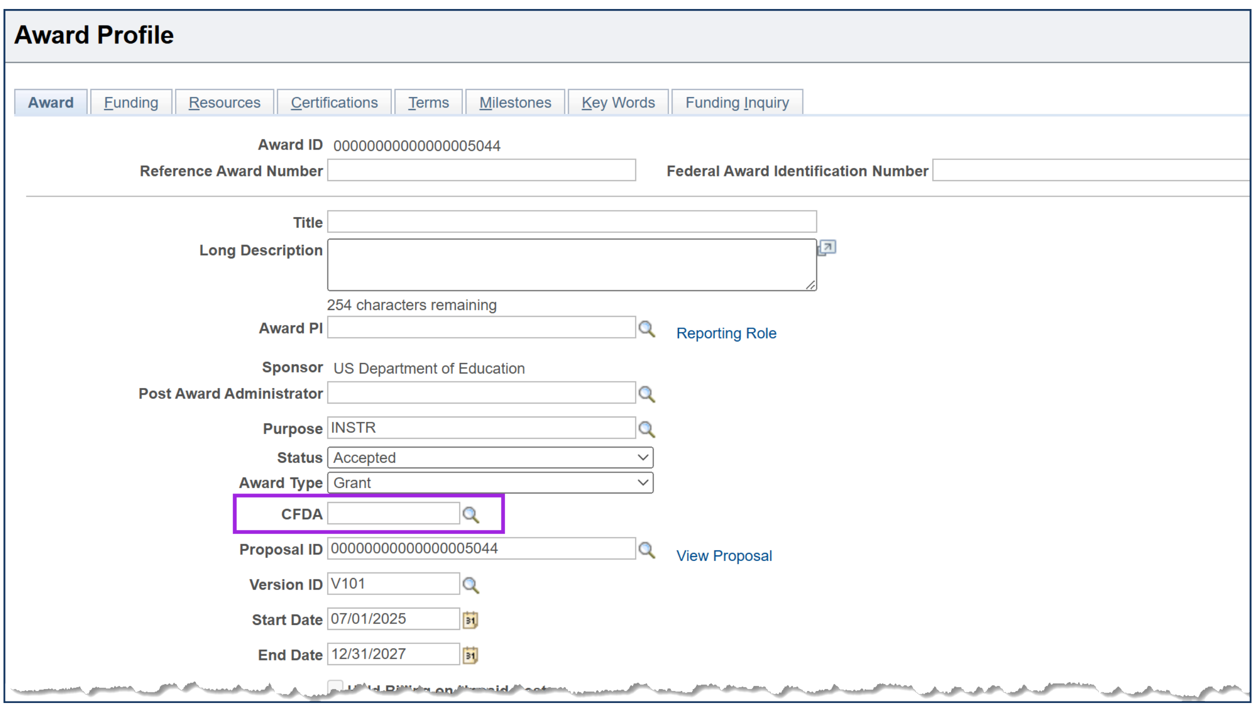
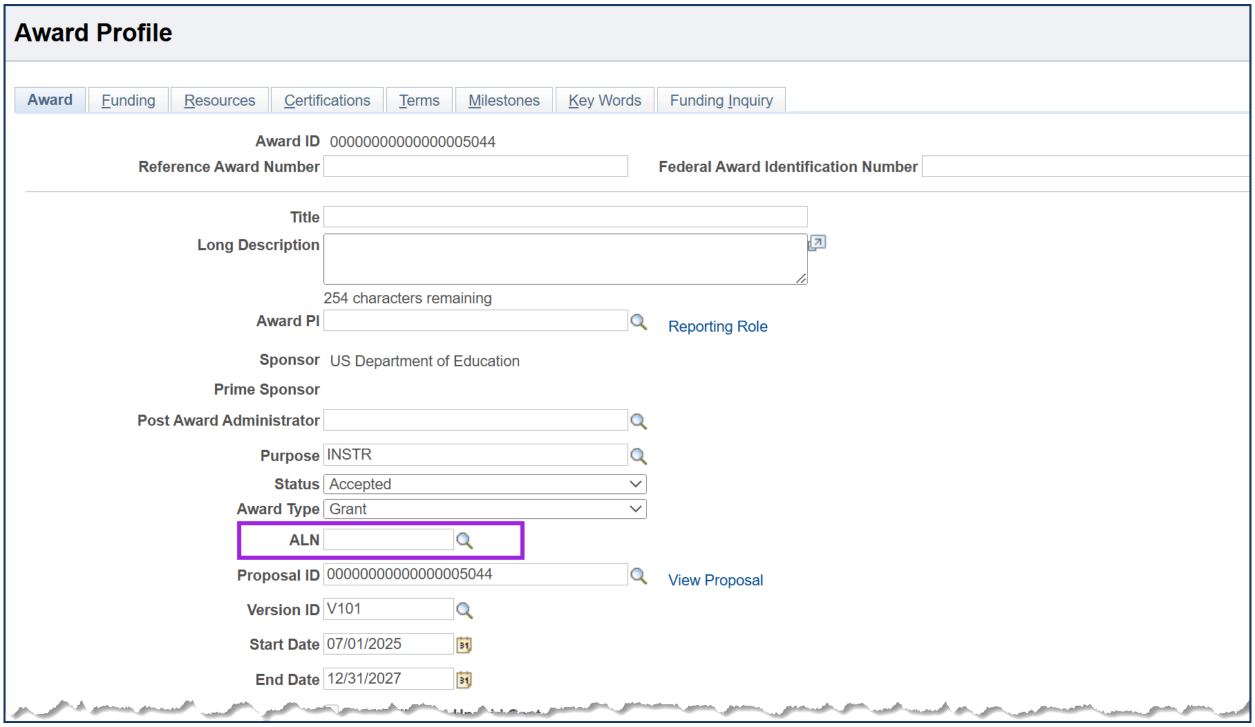


Image: Updated Award Profile Page with ALN



QRGs

[Reimbursable Grant - Creation to Activation]

[Reimbursable Grant with Multiple Projects - Creation to Activation]

[Fixed Price Grant - Creation to Activation]

Billing

Grant Billing: Billing Interface Error Details

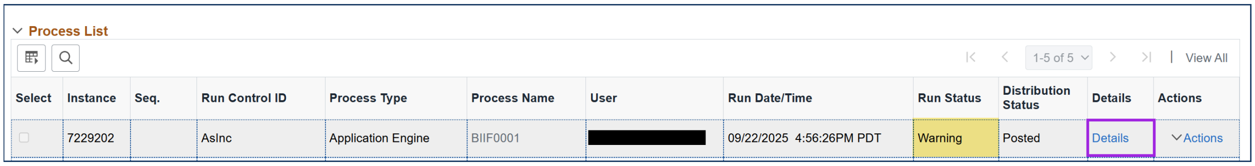
Process Monitor log file now contains information on all errors that occur when processing a billing interface ID number from the Customer Contracts module into the Billing Module (process name: BIIF0001). The process no longer stops after finding the first error. Details are found in the log file. The screenshots below demonstrate how to find the errors in the log file.

Navigation

PeopleTools > Process Scheduler > Process Monitor

Image: Process List in Process Monitor

Select the Details link when the BIIF0001 process is in Warning status.



Process List

1-5 of 5 View All

Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
	7229202		AsInc	Application Engine	BIIF0001	[redacted]	09/22/2025 4:56:26PM PDT	Warning	Posted	Details	Actions

Image: Process Detail Window

On the Process Detail window, select the View Log/Trace link.

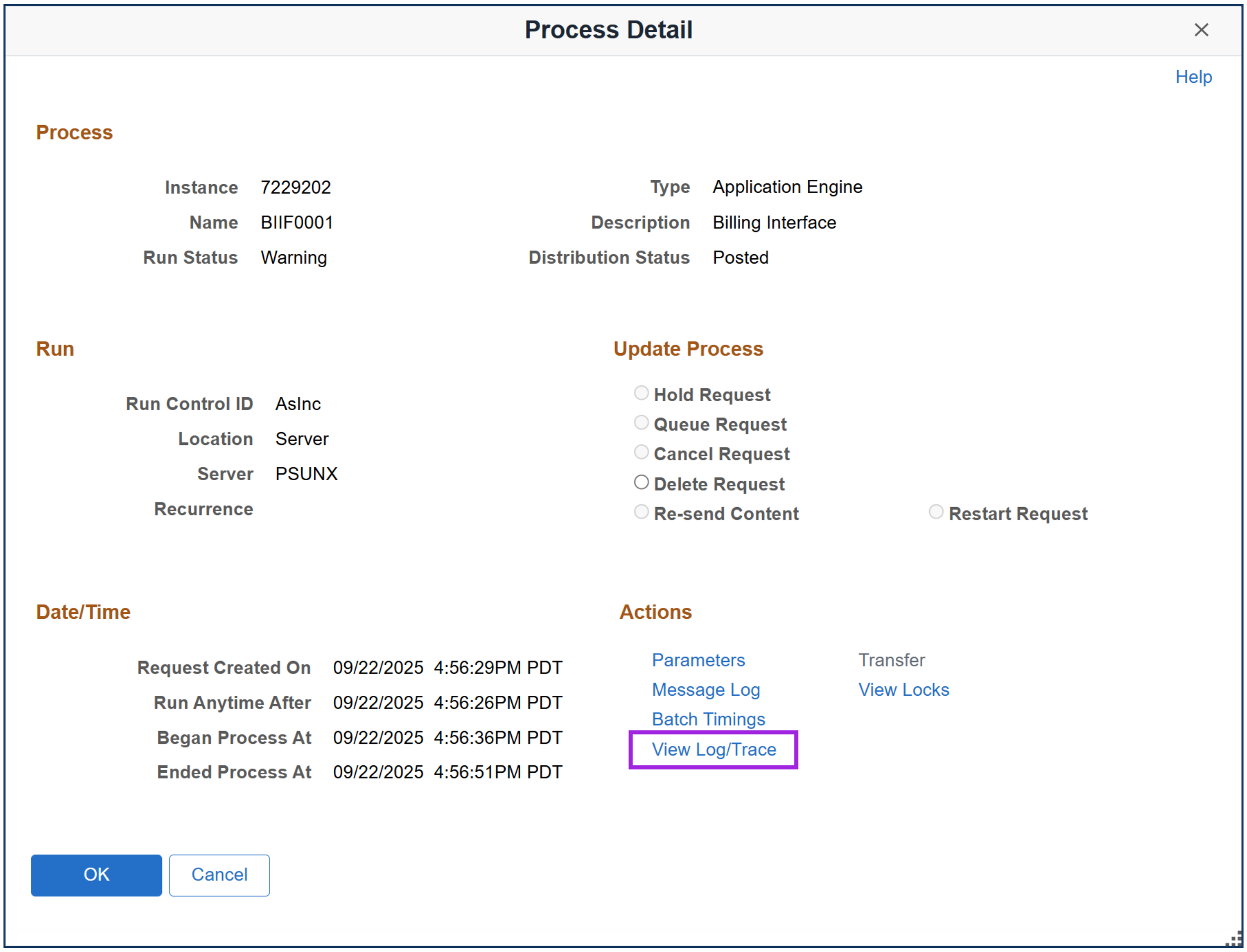


Image: View Log/Trace Window

Select the link for the Interface Errors Log File in CSV format.

View Log/Trace

Help

Report

Report ID	6615528	**Process Instance**	7229202	Message Log
Name	BIIF0001	**Process Type**	Application Engine	
Run Status	Warning			

Billing Interface

Distribution Details

Distribution Node local **Expiration Date** 10/22/2025

File List

Name	File Size (bytes)	Datetime Created
AE_BIIF0001_7229202.log	437	09/22/2025 4:56:51.618923PM PDT
Interface_Errors_Log_File_7229202.csv	259	09/22/2025 4:56:51.618923PM PDT

Distribute To

Distribution ID Type	*Distribution ID
User	[redacted]

Return

Image: Spreadsheet Displaying Interface Error Details

View the error details in the spreadsheet.

	A	B	C	D	E
1	Interface Errors				
2	Interface ID	Interface Line Number	Transaction Type	Transaction Type Seq	Error Message
3	18827	1	Accounting Entry	0	Invalid Business Unit
4	18827	1	Accounting Entry	0	Invalid Account
5	18827	1	Chargeable Line	0	Error in PS_INTFC_BI_AEDS row
6					
7					

As in the past, interface errors can be corrected by navigating to Billing > Interface Transactions > Correct Interface Errors using the following QRG.

QRG

[Correcting Interface Errors](#)

Grant Billing: Updated Tab Name in Correcting Interface Errors

Both tabs on the Correct Interface Errors page used to be labeled **Billing Interface – 1.** The tabs now have distinct labels better describing the components of each tab: **Bill Interface Info** and **Bill Interface – Acc Entry.**

Navigation

Billing > Interface Transactions > Correct Interface Errors

Image: Old Correct Interface Errors Tab Name

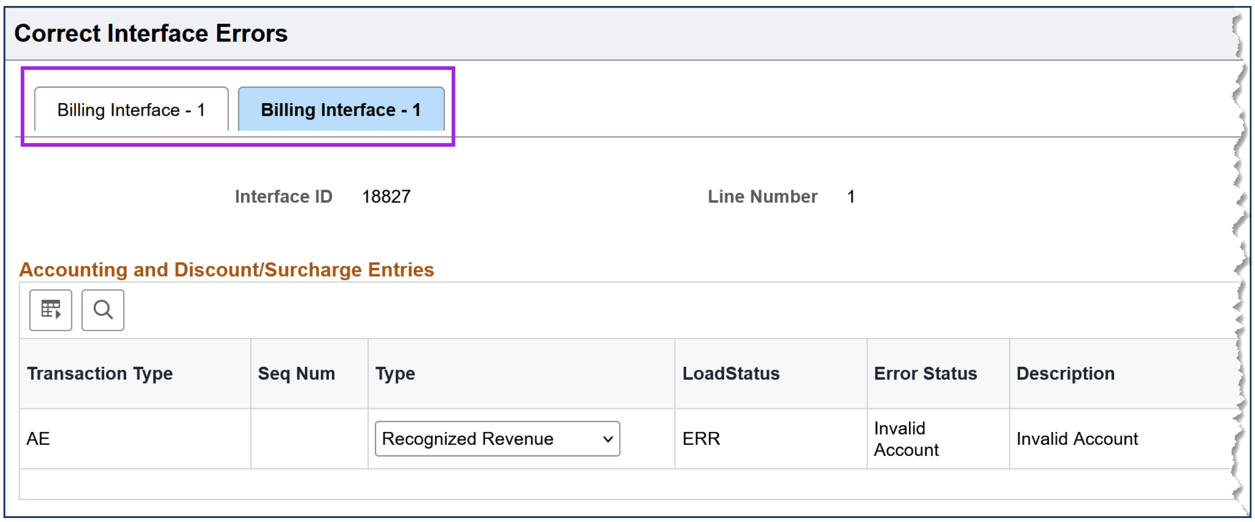
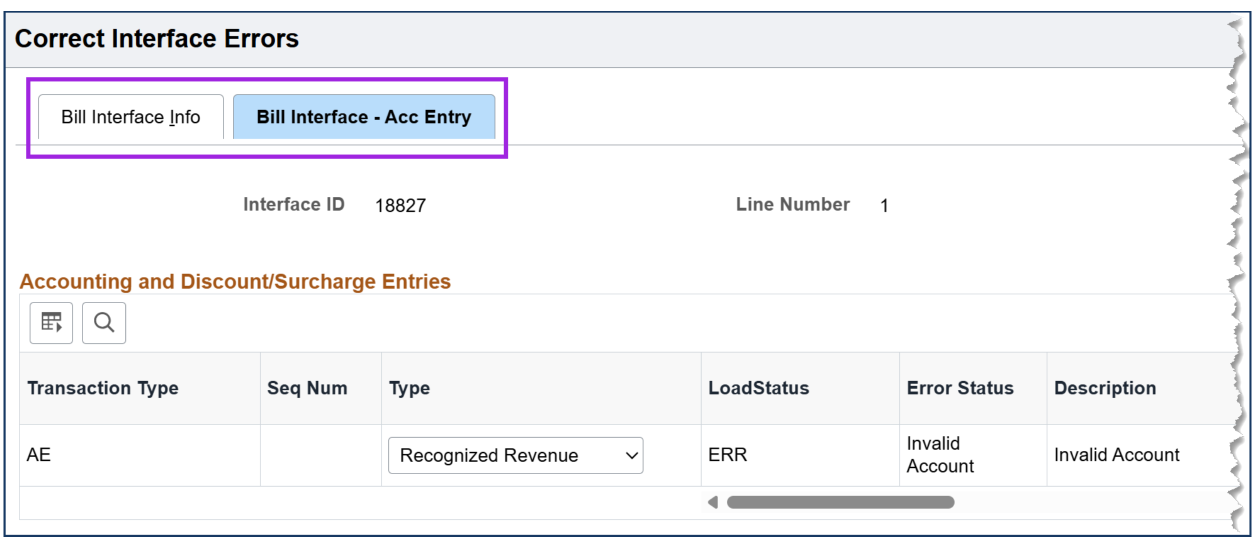


Image: New Correct Interface Errors Tab Name



Billing: Remove Budget Status Column from Invoices Not Integrated to GL

Oracle removed the Budget Status column from the "Invoices Not Integrated to GL" view in both Classic and Fluid Billing Work Center, as it consistently displays blank values and provides no functional value.

Business Impact:

- The Budget Status column occupies screen space without providing useful information
- Creates user confusion as they expect to see values populated at some point
- Reduces UI clarity and efficiency in the Billing Work Center

Navigation

Billing > Billing Workcenter

Image: Invoices Not Integrated to GL Pagelet

Before the image, the Budget Status column is visible in both Classic and Fluid interfaces but never displays any values (always blank).

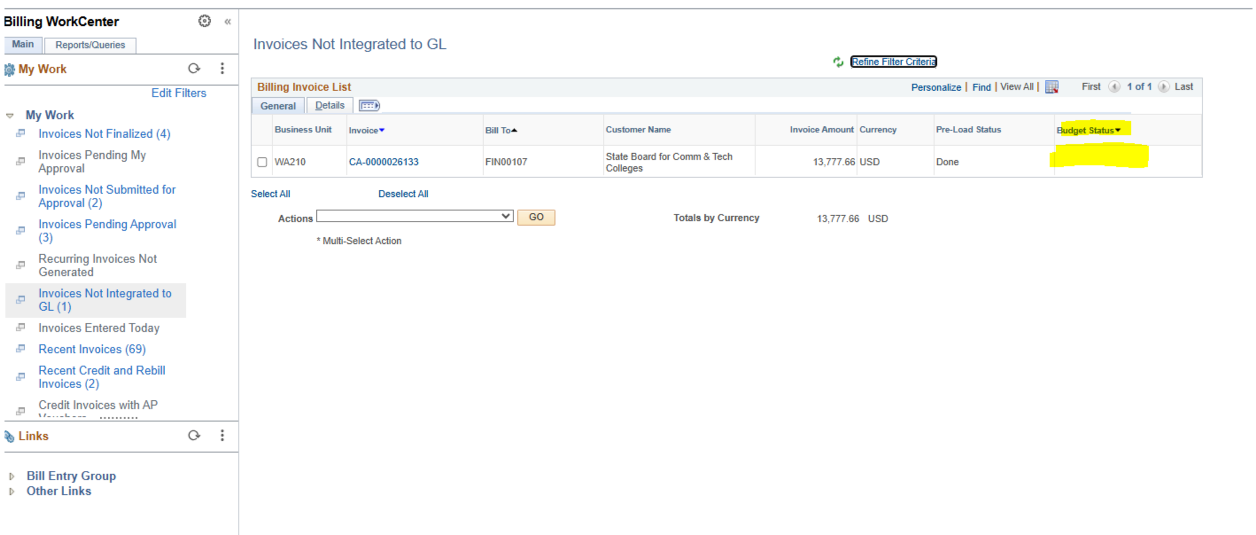
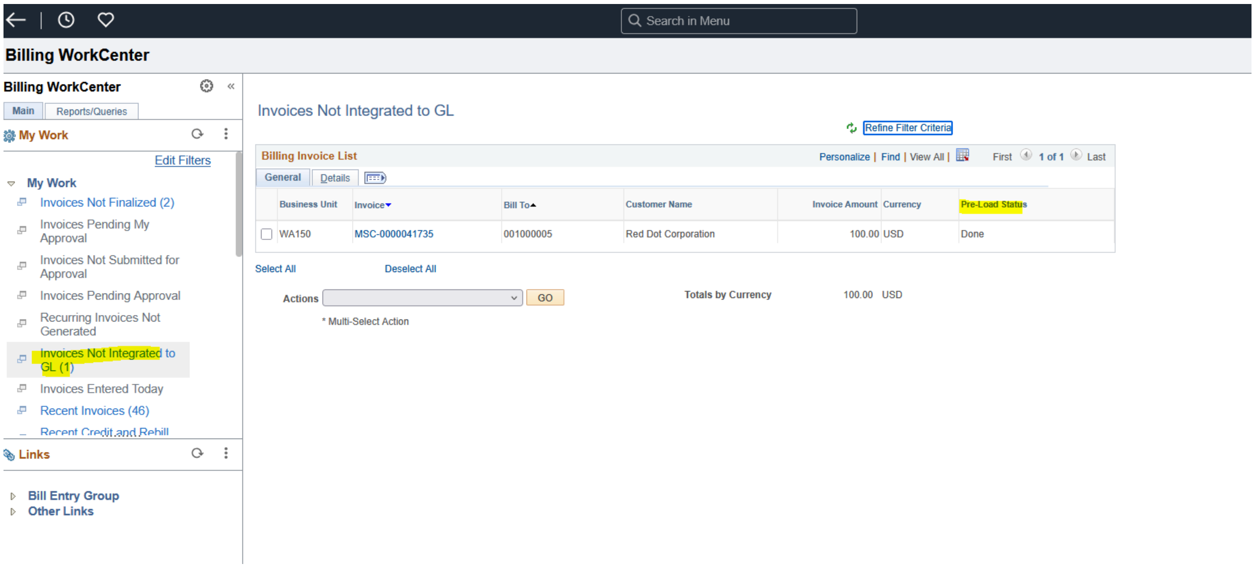


Image: Invoices Not Integrated to GL Pagelet

After the image, the Budget Status column was removed entirely from the "Invoices Not Integrated to GL" view in both Classic and Fluid Billing Work Center



Workaround

Alternative Access to Budget Status Data

Budget Status information remains accessible to users through PeopleSoft Query or Review Billing Information Page.

PS Query

Use this Query QFS_BI_INV_BUDCHK_INCMPLT to identify invoices that did not complete

QRG

[Budget Checking Billing Invoices]

[Correcting Billing Errors and Exceptions]

General Ledger

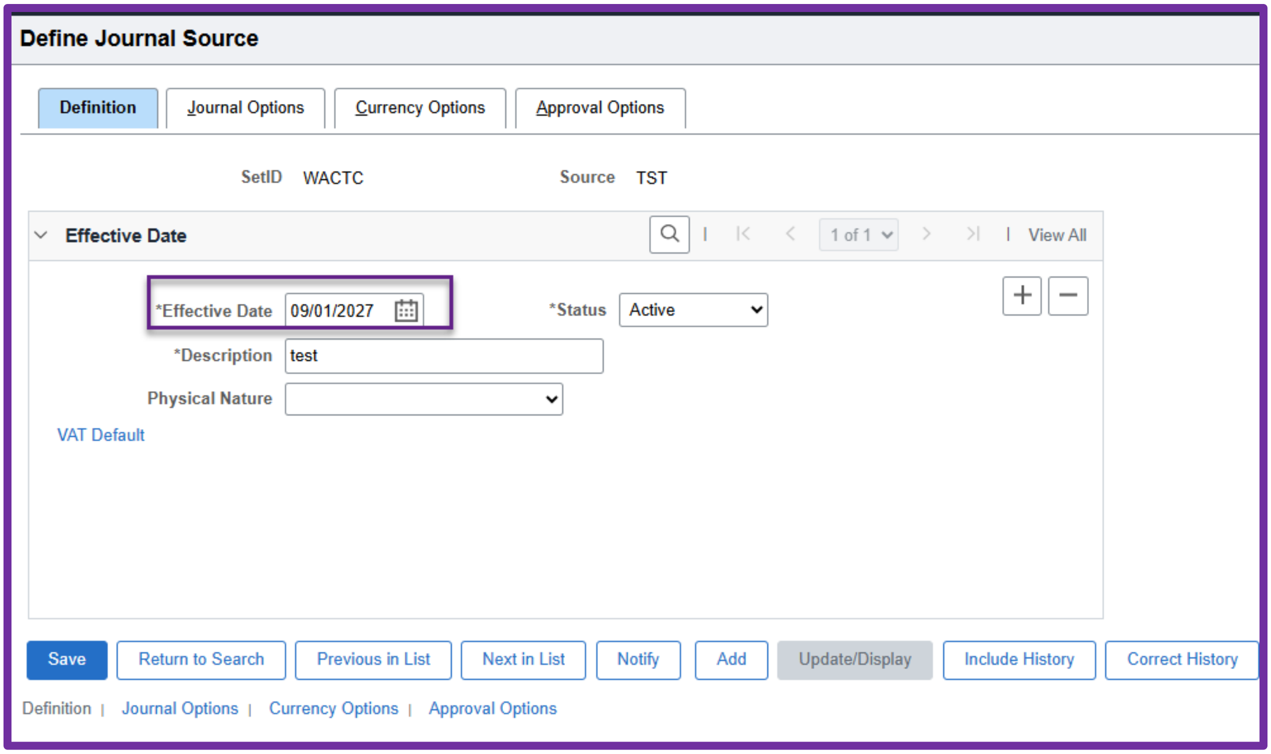
Future Effective Dating Journal Source will not Show in Current Journal Selection

When creating a journal, only current journal sources should be available for selection. A future dated journal source should not be available.

Navigation

FSCM Menu > Set Up Financials/Supply Chain > Common Definitions > Define Journal Source

Image: Example of a Future dated Journal Source TST

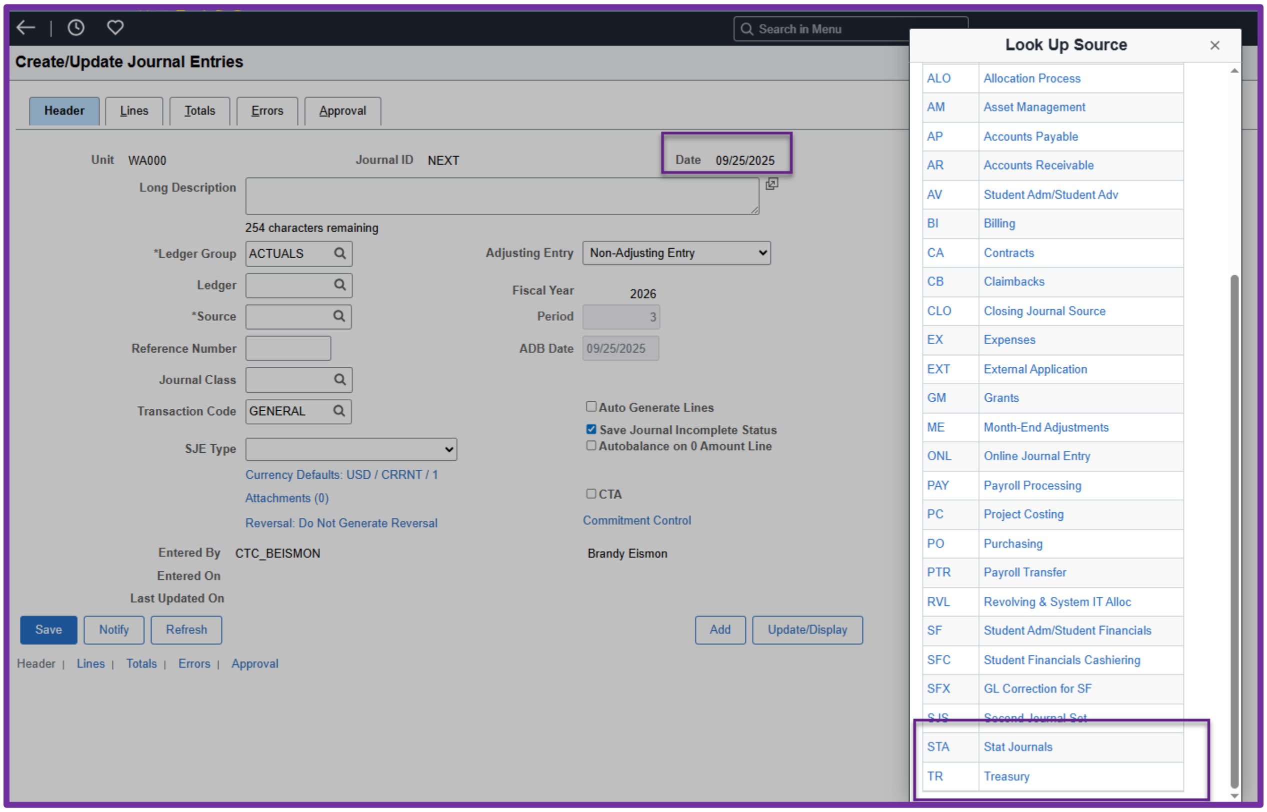


Journal source for a journal dated 9/25/25 is not found for TST

Navigation

FSCM Menu > General Ledger > Journals > Journal Entry > Create/Update Journal Entries.

Image: Selection of Journal Source on Manual Journal



QRG

[Create/Edit Journals]

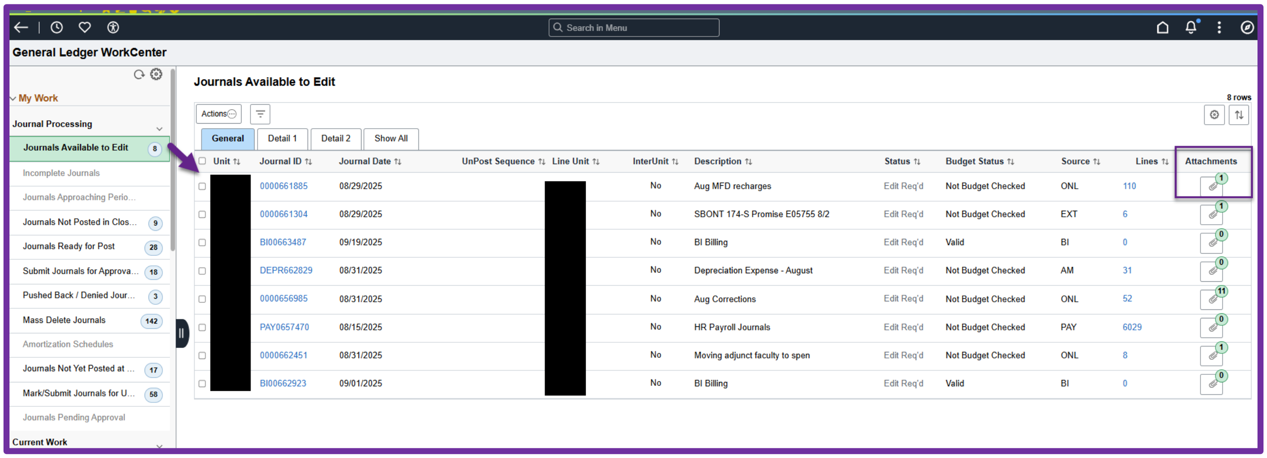
Fluid WorkCenter Attachments – New Icon/Less Clicks

The General Ledger Fluid WorkCenter has improved the view and saves clicking steps when reviewing attachments in Pagelets under Journal Processing and Current Work. The number of attachments are to the right of the view on the paper clip icon and can be clicked on to pull up the navigation to the attachment selection.

Navigation

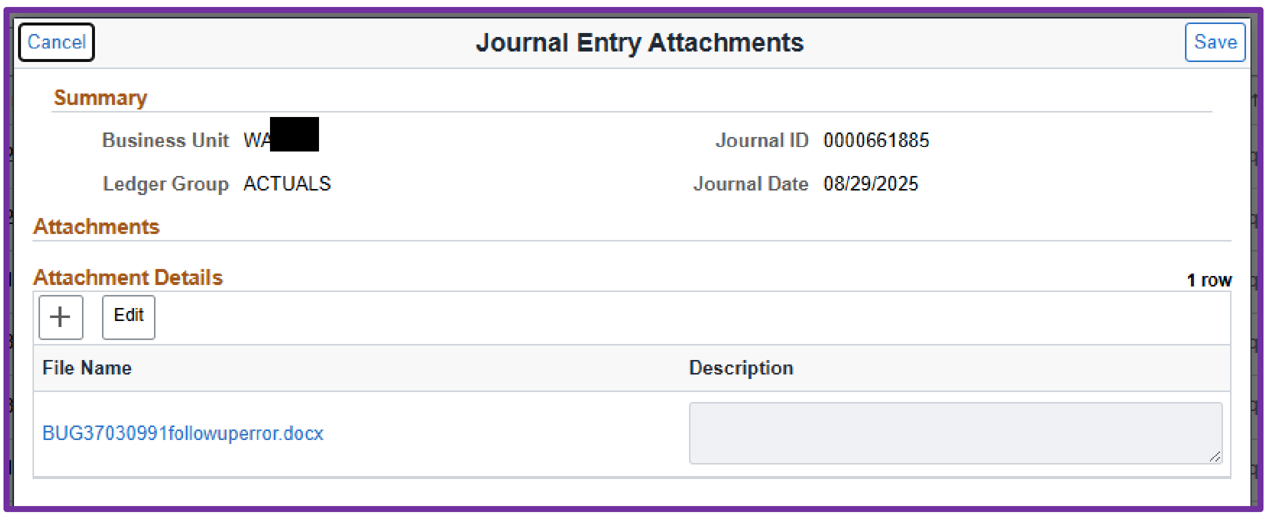
GL WorkCenter fluid Tile

Image: General Ledger WorkCenter Fluid Tile, My Work Section



Example of attachment icon is shown on the Journals Available for Edit. The Attachment can be viewed by clicking on the hyperlink under File Name.

Image: Fluid General Ledger WorkCenter



QRG

[WorkCenter Attachments]

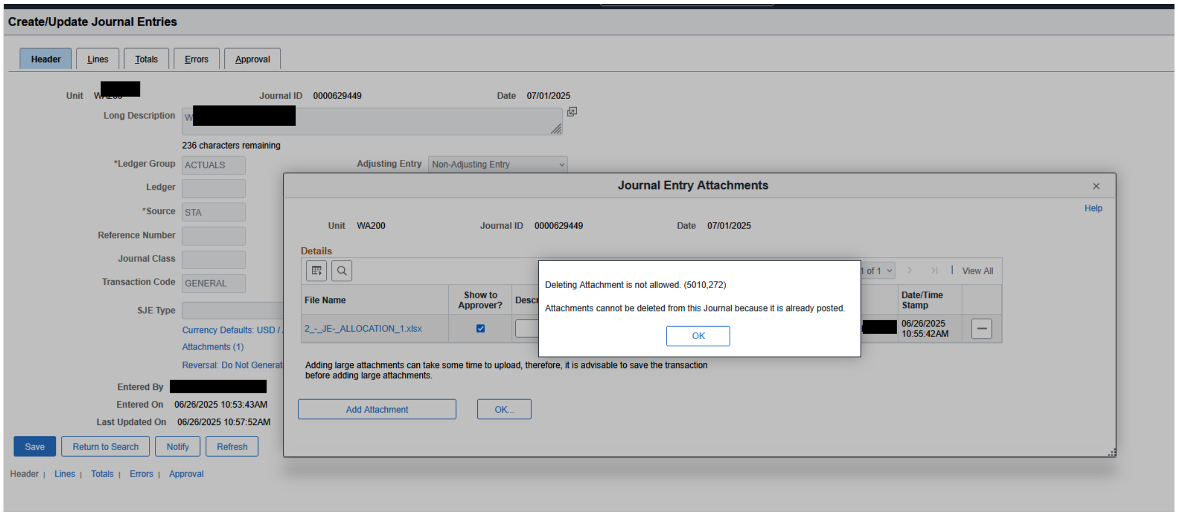
Journal Attachments can be Cancelled Before Attaching to a Posted Journal

Previous to image 53, when a person adds an attachment to a posted journal they cannot change their mind, but will have to post it. With the new image 53, if a user cancels the attachment before selecting “OK” it will cancel and not return a “…not allowed” message. (Do note, once saved it will be preserved, and you cannot delete an attachment on a posted journal.)

Navigation

FSCM Main menu > General Ledger > Journals > Journal Entries > Create/update Journal entries

Image: Prior to Update, From Create/Update Journal Entries



QRG

[Journal Attachments can be Cancelled]

Previously, on the import journal template if you move the field Open Item Key to anything other than the last field on the template it would not properly set the column length. Image 53 allows you to move this field to the location of your choice.

Navigation

JRNL1_WS Journal Import Template

Image: Prior Right Side of JRNL1_WS Import Journal Template

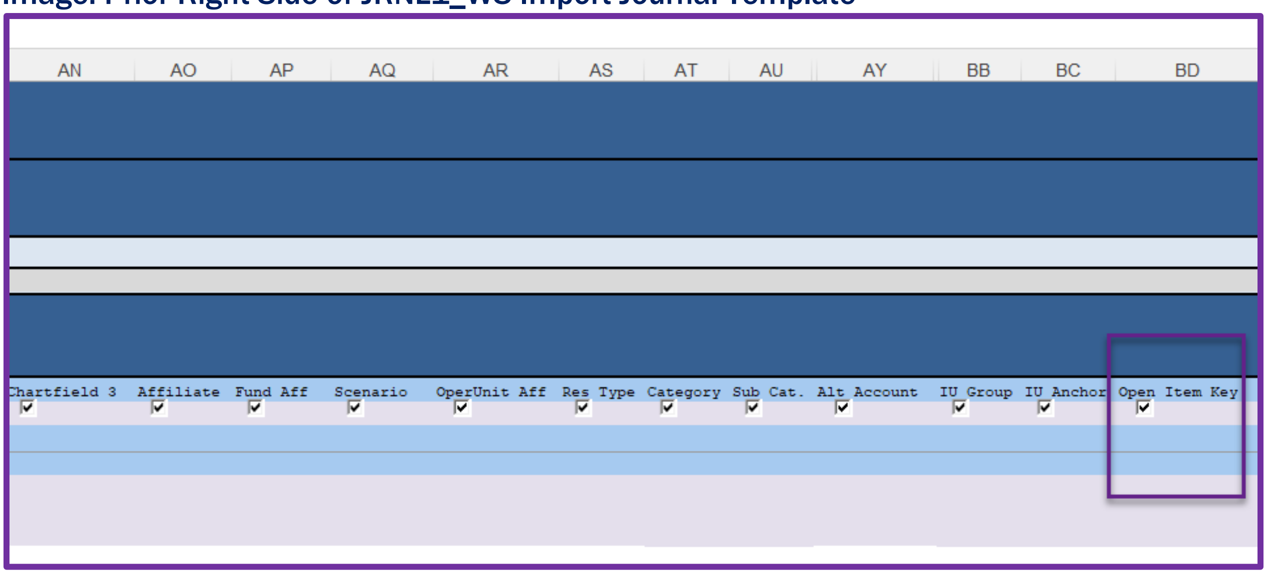
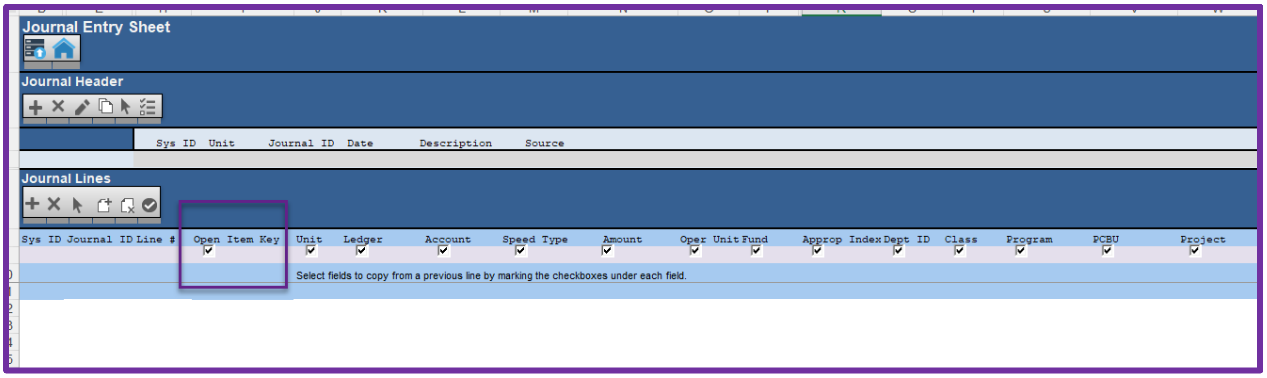


Image: New JRNL1_WS Import Journal Template



QRG

[Customizing Journal Import Template]

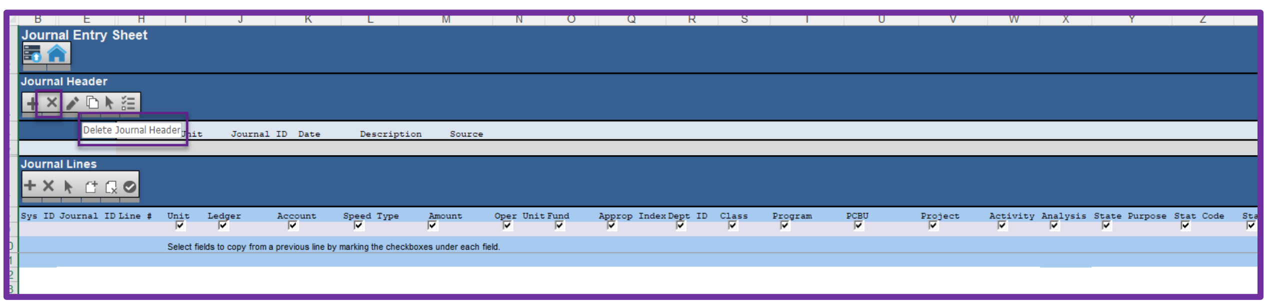
Hovering Text on Icons for the JRNL1_WS Journal Template

On the Journal Entry Sheet of the JRNL1_WS journal import template, you can now hover over the icons to see the detail description of what the icon button does.

Navigation

JRNL1_WS Journal Import Template

Image: JRNL1_WS Journal Import Journal Entry Sheet, Shows Hovering Over Delete Icon



QRGs

[Importing a Journal (Import Now)]

[Importing a Journal (Write to File)]

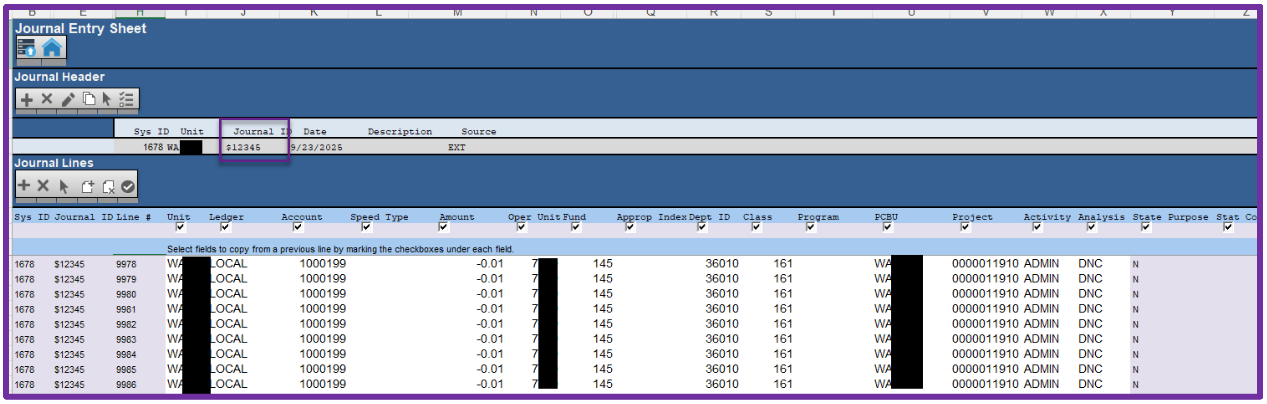
JRNL1_WS Import Can Use Special Characters for Journal Numbers

The Import journal JRNL1_WS now allows for the journal number/label to have a special character.

Navigation

JRNL1WS Journal Import Template

Image: Taken from JRNL1_WS Shows Dollar Sign in Journal Number



QRG

[Importing a Journal (Import Now)]

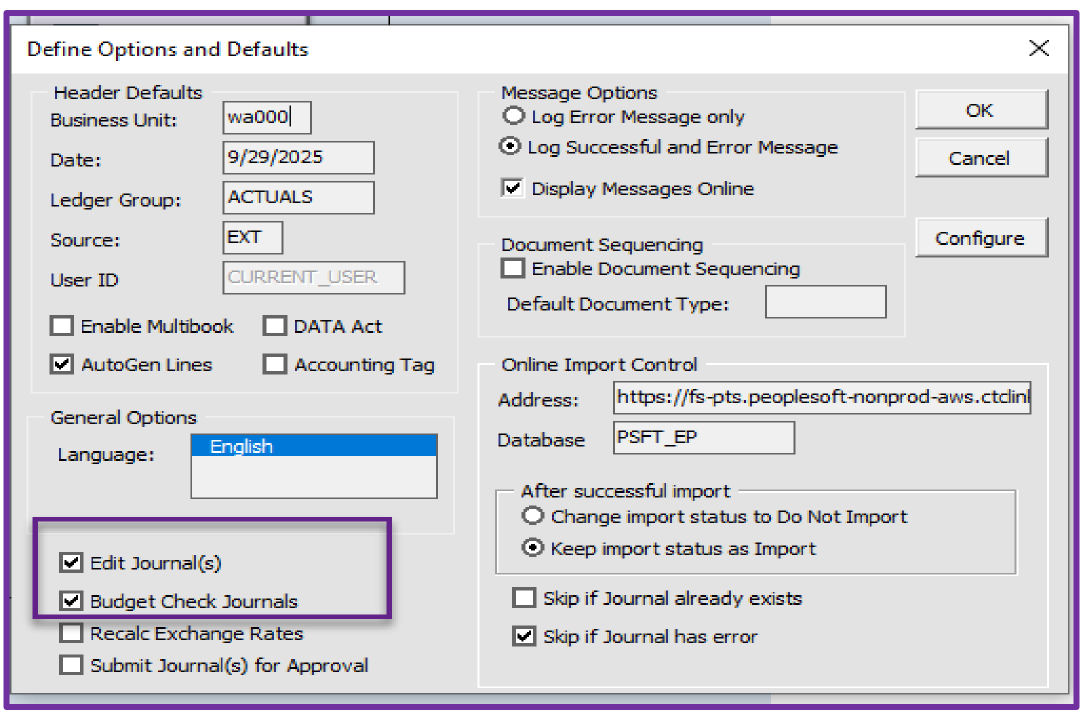
JRNL1_WS correction allows for budget checking on imported journals

Previously, by selecting the "Edit Journal(s)" option and the "Budget Check Journals" on JRNL1_WS Setup, users would get the message that transactions were budget checked but they were NOT. This is now fixed and by clicking on the “Edit Journal(s)” and “Budget Check Journals” the journal should be edited and budget checked properly.

Navigation

JRNL1_WS Journal Import Template

Image: JRNL1_WS Journal Import, Setup & Defaults



QRG

[Importing a Journal (Import Now)]

Comment Box is Displayed on Submitting a Journal

This enhancement allows the submitter to attach a comment to their journal before submitting for approval. It also allows users to review comments when a journal is denied.

Navigation

FSCM Menu > General Ledger > Journals > Journal Entries > Create/Edit Journal Entries

Image: From Create/Update Journal Entry, Lines tab on Creators' Side Before Submitting

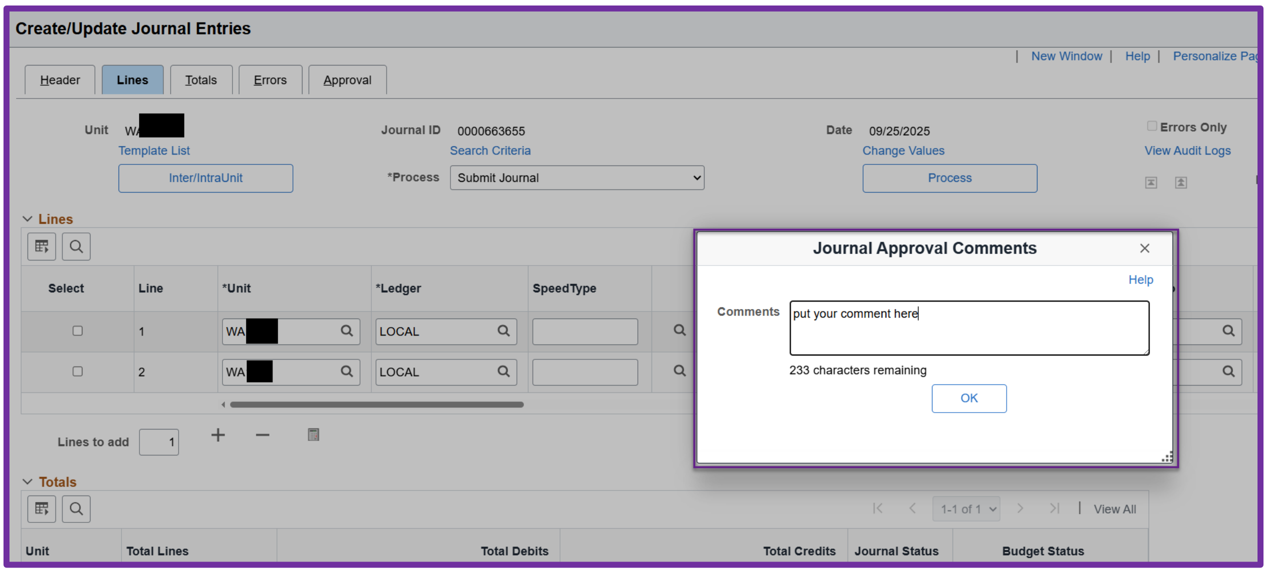


Image: From Create/Update Journal Entries, Approval Tab View of the Journal Approver

On the approvers side it will contain the comment in the approval tab.

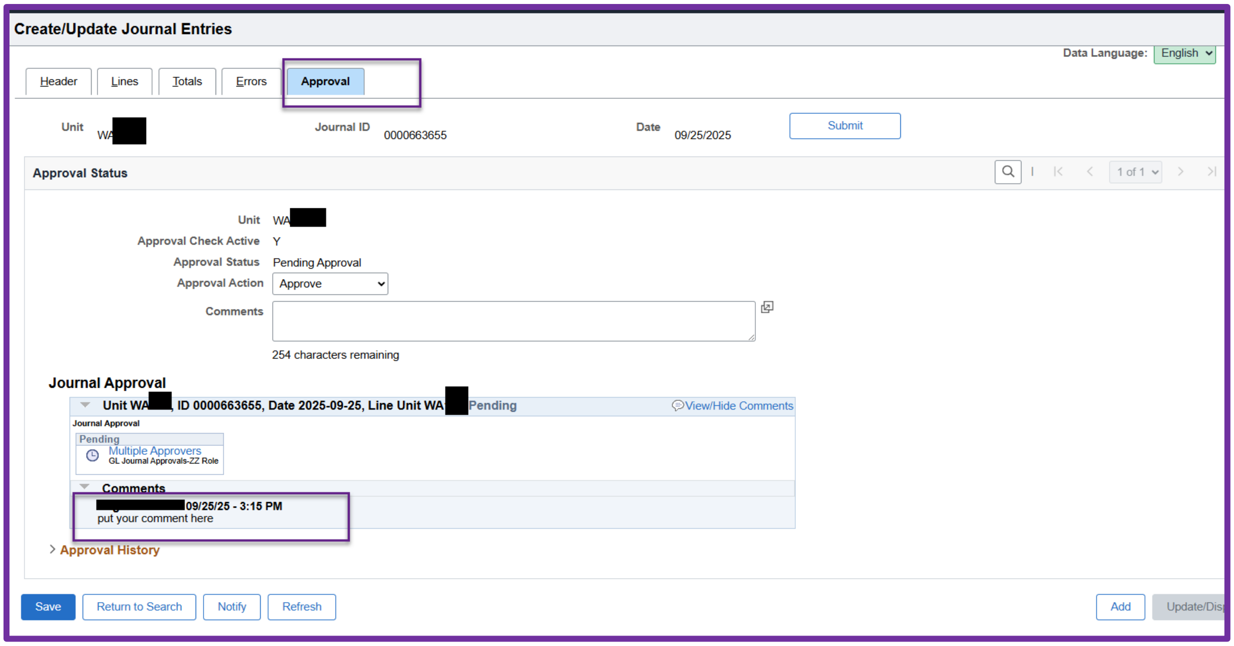
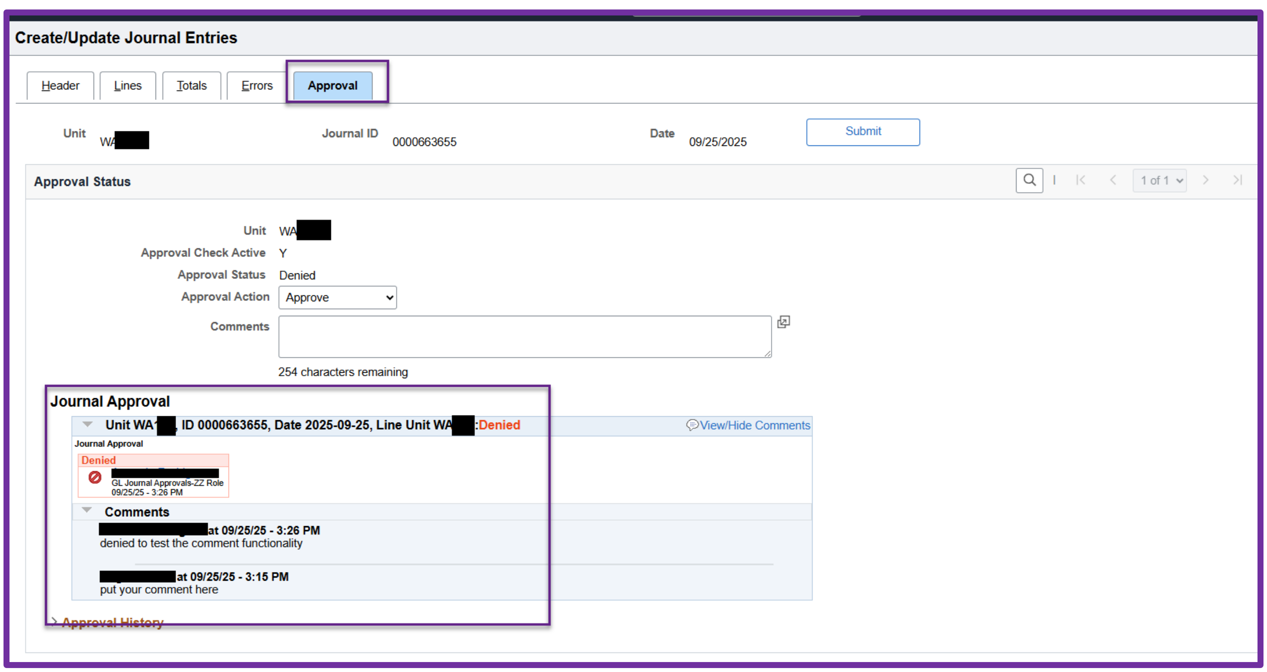


Image: From Create/Update Journal Entries, Approval Tab

Denied journal comment shows on the creator's approval tab.



QRG

Manual Journal Submission

New Feature - Check Box to Remove Comment Regarding Waiting for Journal Processing

This new feature enables a college user to eliminate the popup box asking if they … “would like to wait…” while their Journal is being processed.

There are two boxes to Uncheck if the popup question is not desired. The popup question is a default; to remove the popup an IT specialist will have to remove one or both check marks from Define user preferences (select Overall Preferences and General Ledger).

The first check box, if checked, will deliver a popup question when editing a journal, asking if they would like to wait while the journal is being processed. If unchecked the message will not appear.

The second check box is for when the user wants a comment popup when a journal is being posted. If unchecked the message will not appear.

Navigation

FSCM Main Menu > Set Up Financials/Supply Chain >Common Definition s >User Preferences > Define User Preferences (select Overall Preferences and General Ledger)

Image: Example of wait message on running an edit/post on create/update Journal Entries

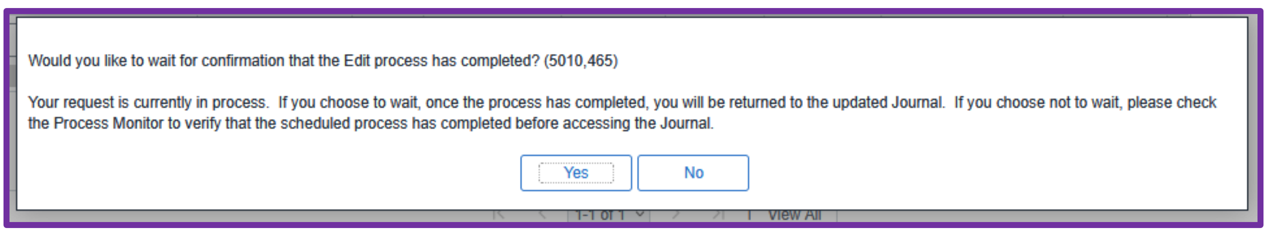


Image: Define User Preferences, BEFORE the Image

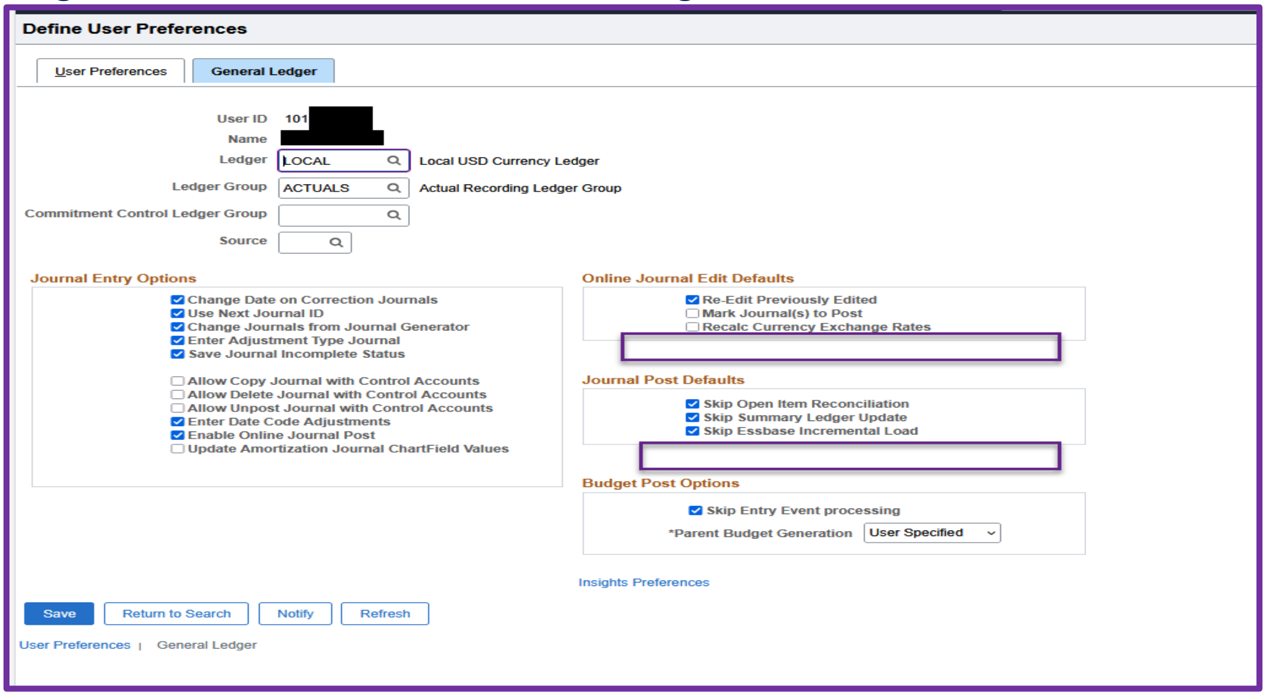
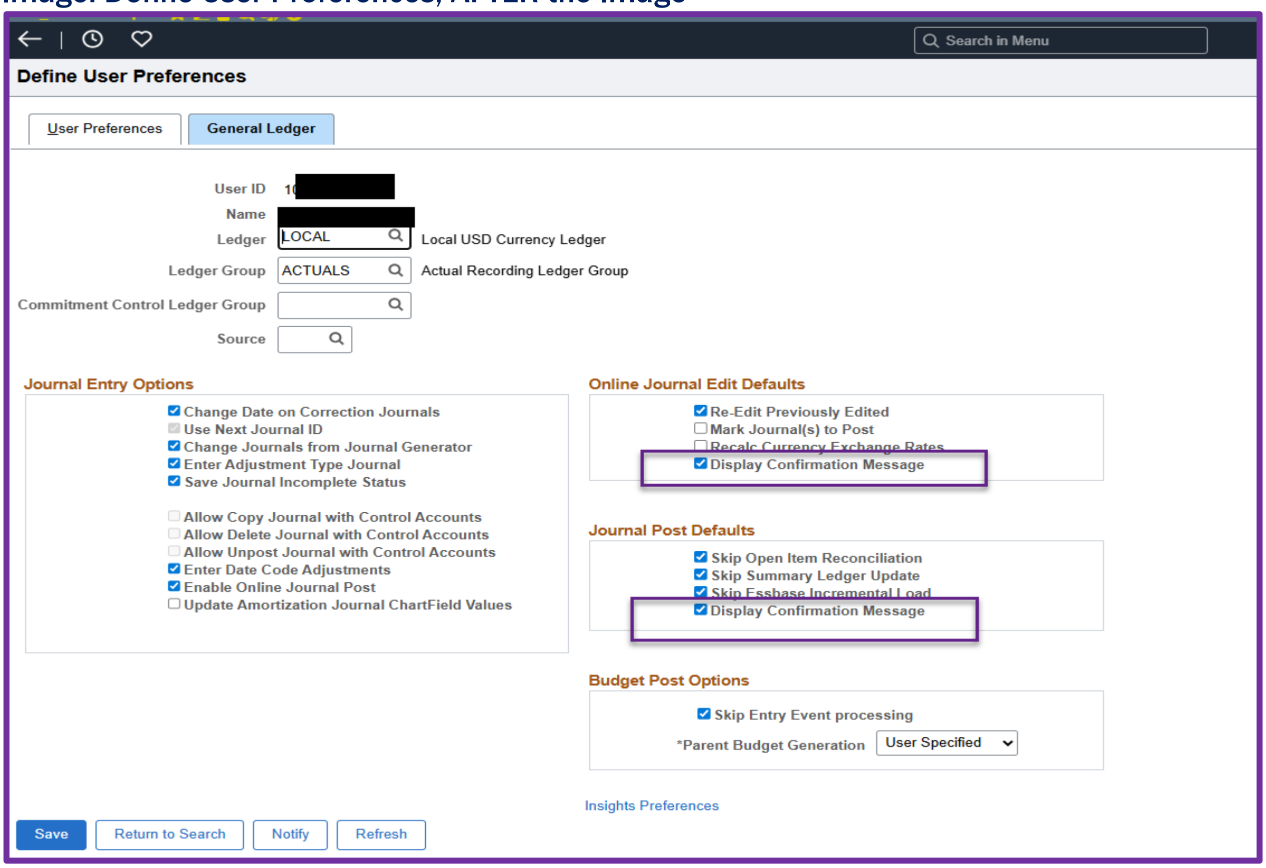


Image: Define User Preferences, AFTER the Image



QRG

[Check Box to Remove Comment]

Accounts Payable

New Feature – Voucher Approval Remit to Supplier Information

Added the option to view remit-to supplier information on the Fluid Voucher Approval page.

Navigation

NavBar > Approvals Tile > Pending Approvals > Vouchers

Display Remit Supplier in Fluid Voucher Approvals.

Image: Fluid Voucher Approval Page

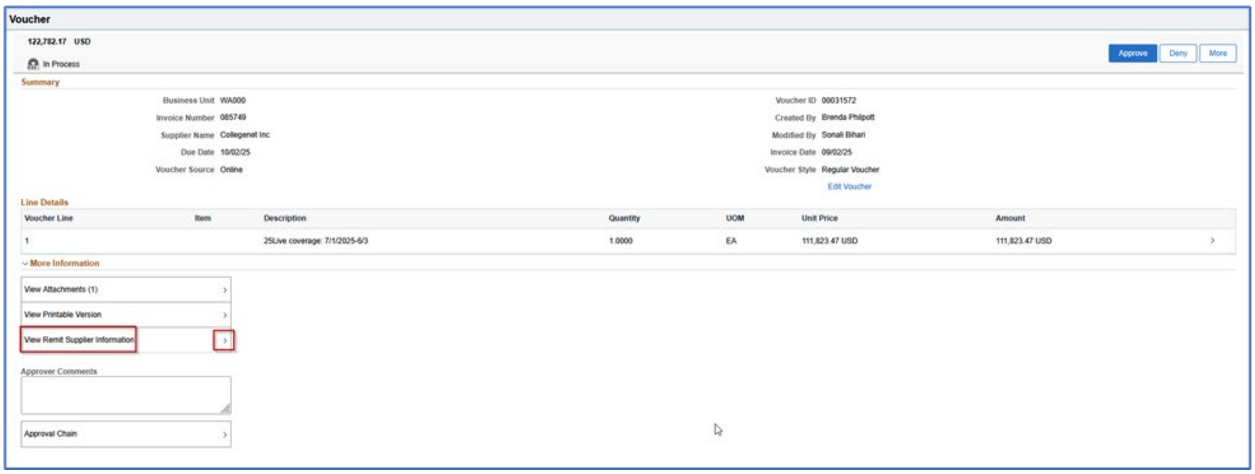


Image: Remit Supplier Information

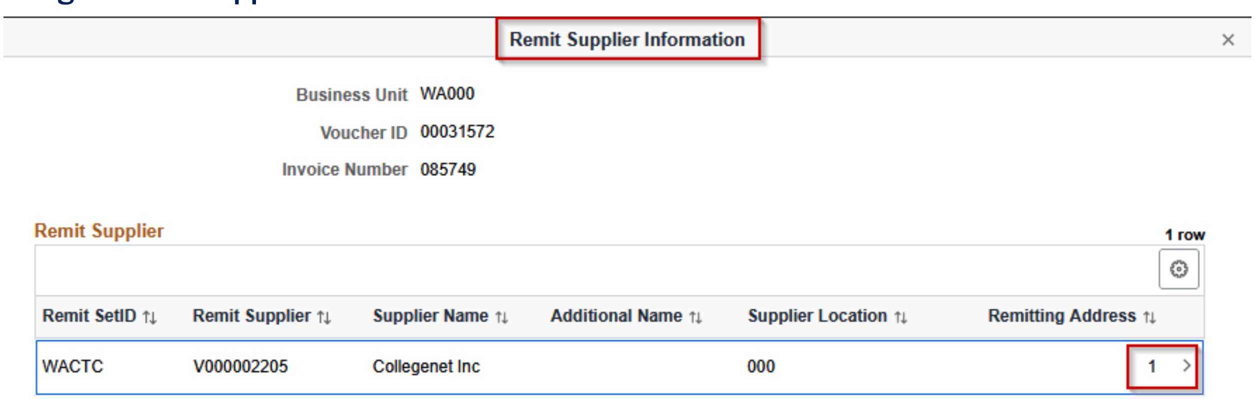
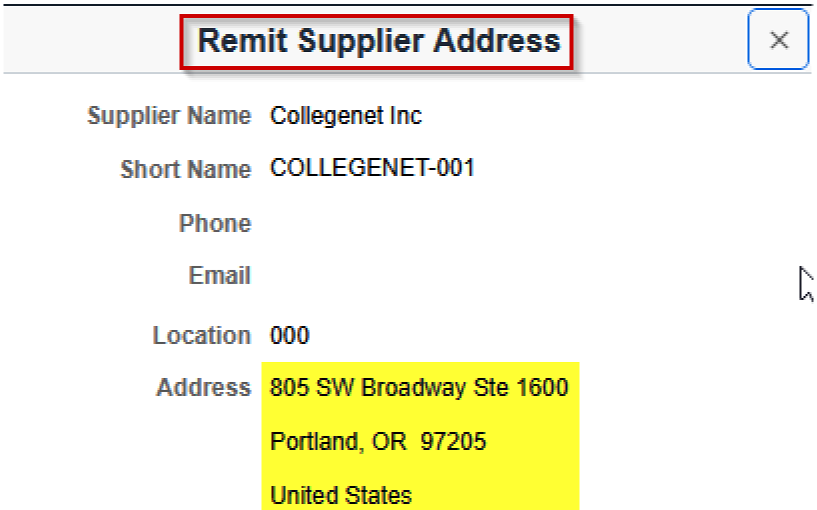


Image: Remit Supplier Address



New Feature - Email Notifications Include Approver Comments When Denied

Email notifications now include approver comments when a voucher or vendor is denied.

Navigation

Fluid > Approvals Tile

Image: Voucher Approval Page

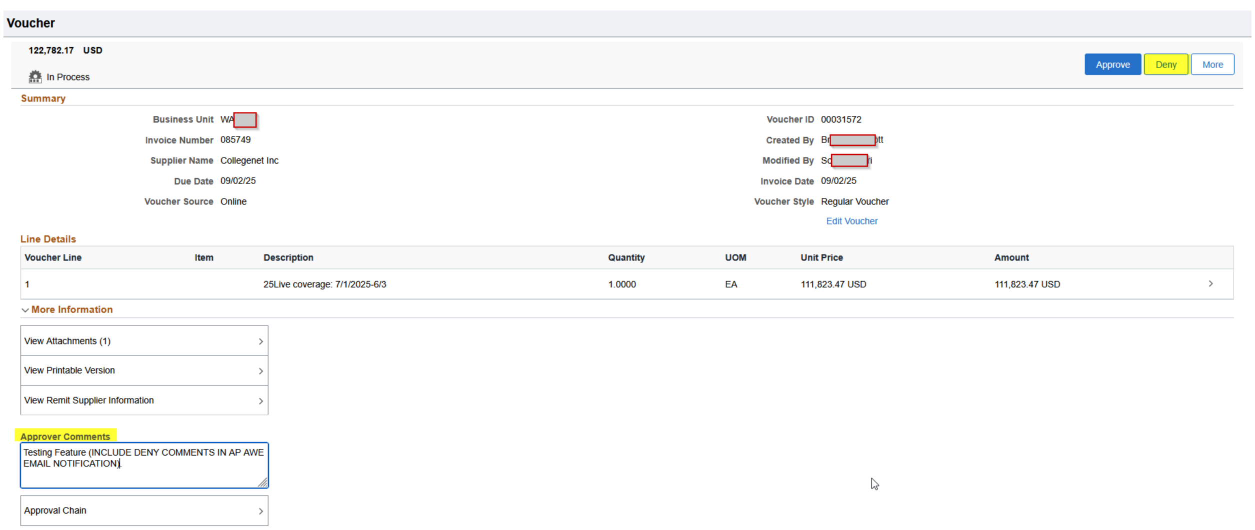


Image: Deny Comment

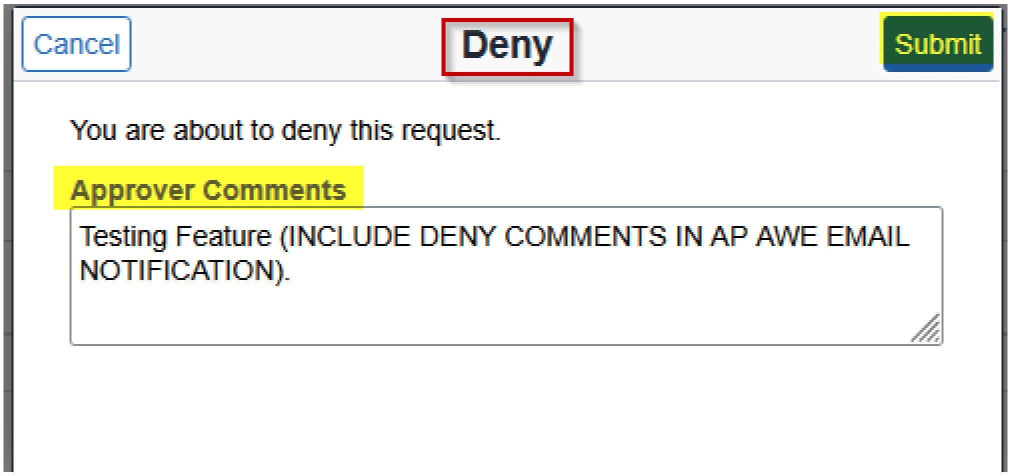


Image: Sample Email

Image: Supplier Approval Page

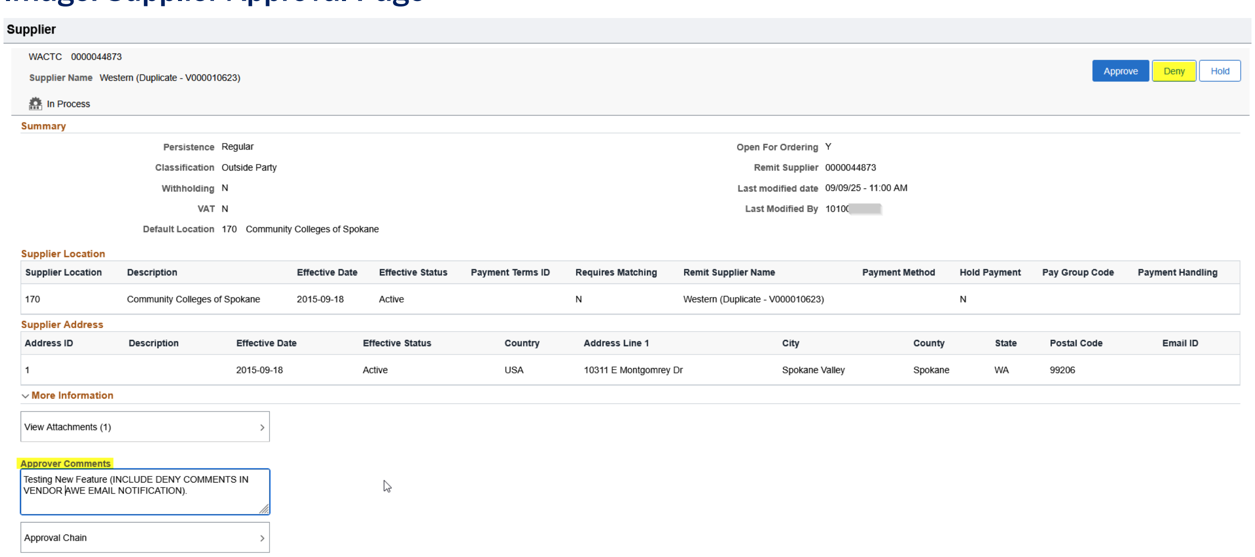


Image: Deny Comment

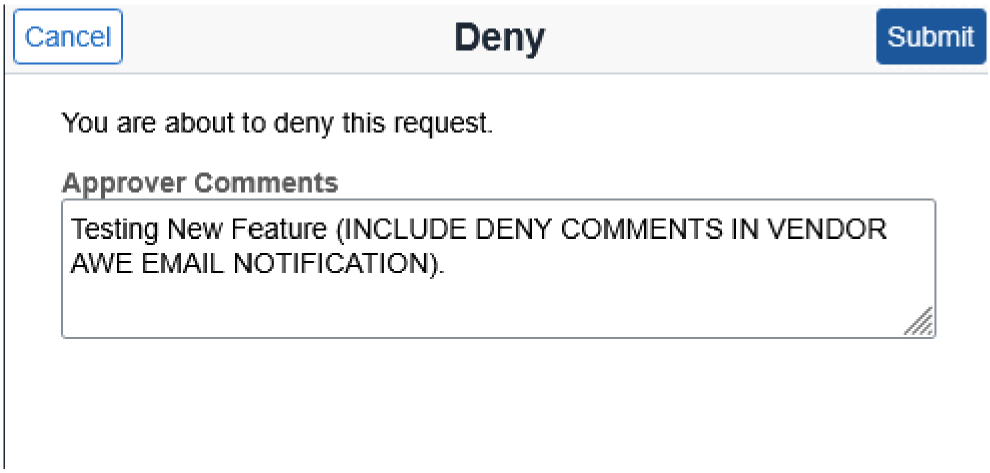
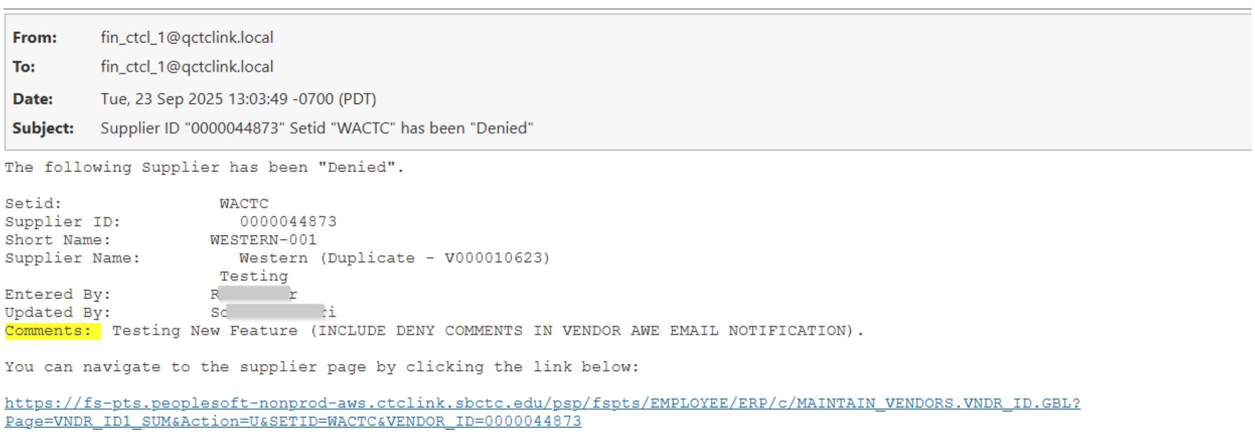


Image: Sample Email



From: fin_ctcl_1@qctclink.local
To: fin_ctcl_1@qctclink.local
Date: Tue, 23 Sep 2025 13:03:49 -0700 (PDT)
Subject: Supplier ID "0000044873" Setid "WACTC" has been "Denied"

```
The following Supplier has been "Denied".

Setid:              WACTC
Supplier ID:          0000044873
Short Name:         WESTERN-001
Supplier Name:        Western (Duplicate - V000010623)
                    Testing
Entered By:         [redacted]
Updated By:         [redacted]
Comments:  Testing New Feature (INCLUDE DENY COMMENTS IN VENDOR AWE EMAIL NOTIFICATION).

You can navigate to the supplier page by clicking the link below:

https://fs-pts.peoplesoft-nonprod-aws.ctclink.sbctc.edu/psp/fspts/EMPLOYEE/ERP/c/MAINTAIN_VENDORS.VNDR_ID.GBL?Page=VNDR_ID1_SUM&Action=U&SETID=WACTC&VENDOR_ID=0000044873
```

QRG

N/A

New Feature - Voucher Upload Improvements

The voucher upload process now has additional fields to the upload spreadsheet, save login information, improve error messages, and implement additional field validations.

1. Add additional fields: **PYMNT_HOLD**, **PYMNT_HOLD_REASON**, and **PYMNT_SEPARATE** – These fields will allow users to indicate if a payment should be held, specify the reason for the hold, and identify whether the payment should be processed separately.

2. Stay logged on in between submissions- the user only had to log in one time to the AP voucher template and then could submit templates multiple times without needing to enter log on detail each time.

3. Improved Error Messaging- will highlight specific fields with issues and provide clear

descriptions when data fails validation. Data cannot be loaded until errors are resolved, preventing invalid entries. This allows users to quickly correct issues in the template before re-uploading, rather than fixing individual errors later.

4. Field Validation- Add validation for each column/field in alignment with existing PeopleSoft system validation. Voucher Header, Line, and Distribution Line data will be validated as it is entered into the AP Voucher Upload template.

QRG

[Create Voucher Using a Voucher Upload Process]()

New Feature – Journal Voucher

Journal Voucher has a new feature to support Copy Distributions of related Voucher.

Navigation

Accounts Payable > Vouchers > Add/Update > Regular Entry

Voucher Style: Journal Voucher

Image: Journal Voucher Page

Select **Copy Distribution button** to copy all the voucher lines or select the specific line by entering voucher line **From Voucher Line** and **To Voucher Line** field.

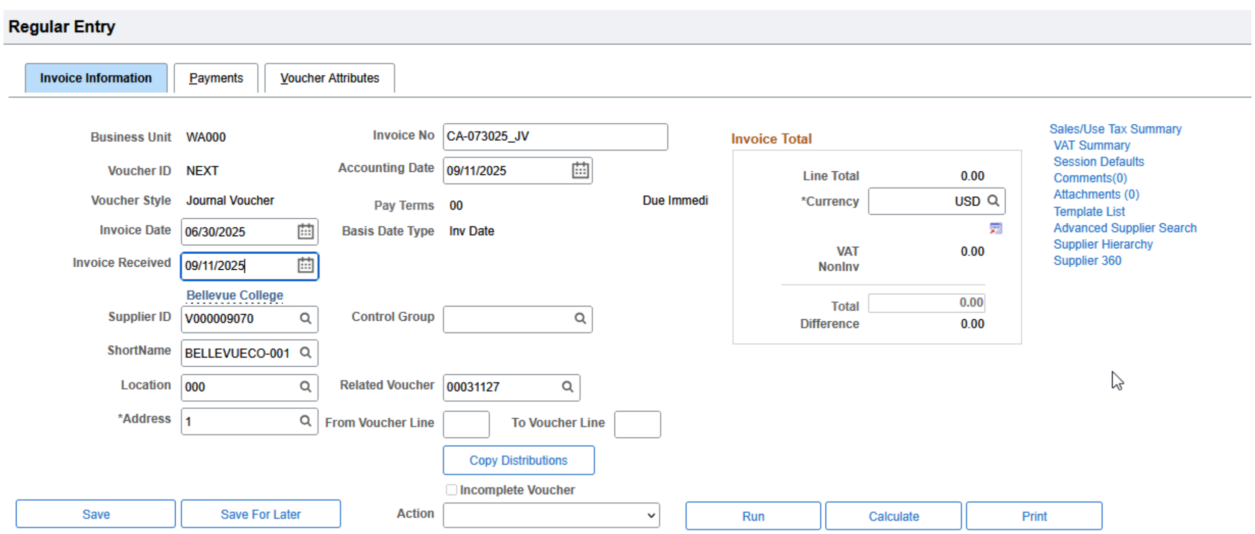
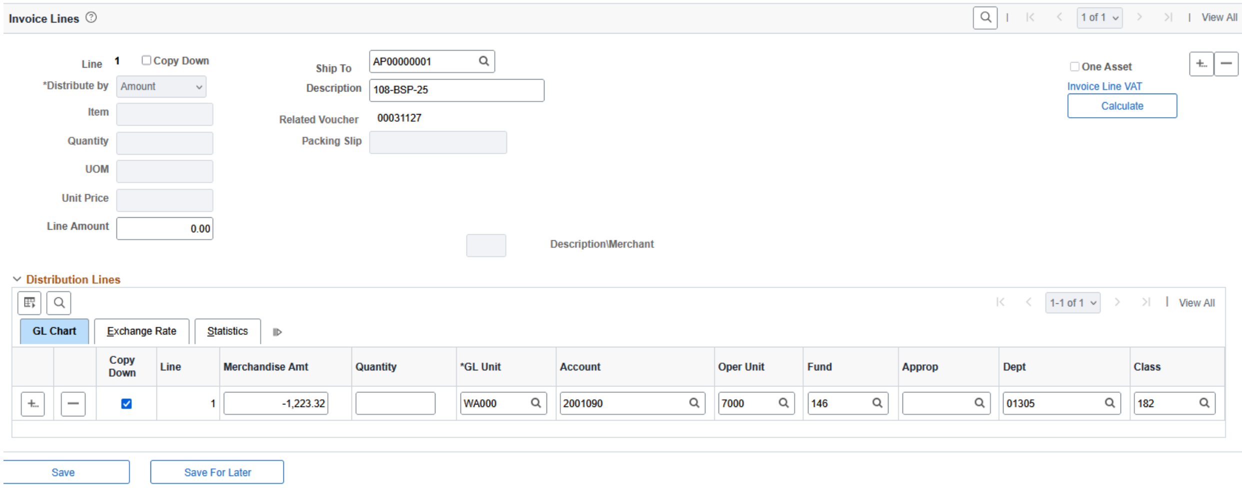


Image: Distribution Line After Copy Distribution

In the Invoice Lines section, ChartField values are copied from the original voucher.



QRG

[Enter a Journal Voucher]()

Accounts Receivable

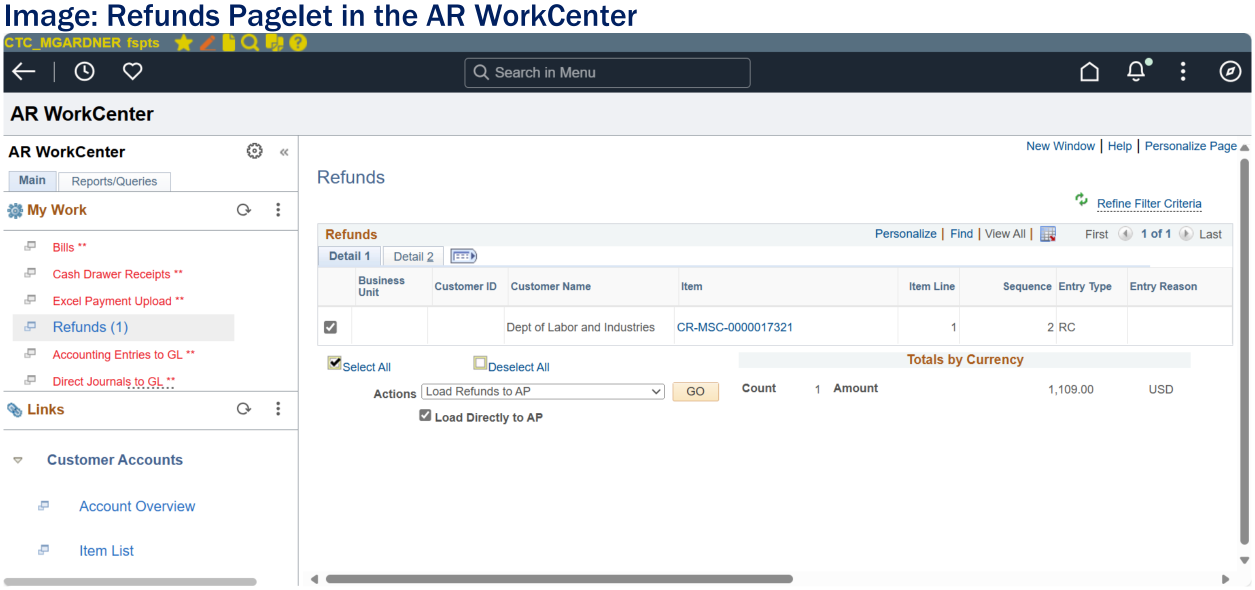
Refunds in AR WorkCenter

Oracle has created the Refunds pagelet in AR WorkCenter for a one stop shop to create, process, and view refunds.

Navigation

Main Menu > Accounts Receivable > AR WorkCenter

Image: Refunds Pagelet in the AR WorkCenter



QRG

[Refunds in AR WorkCenter]()

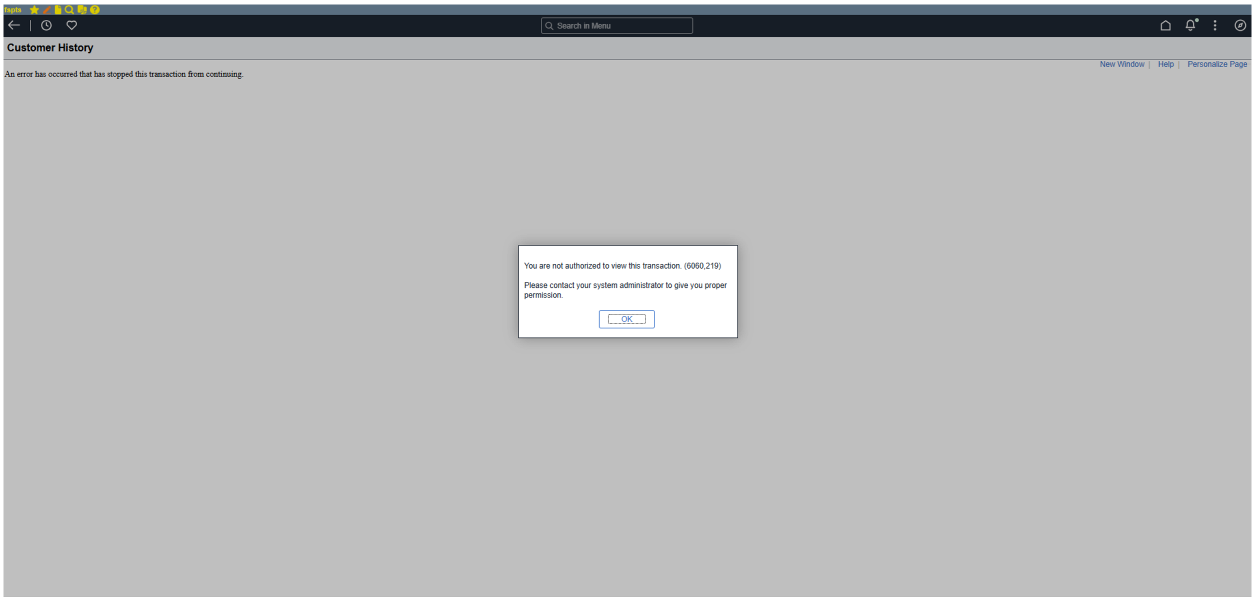
Customer History Page Error

The Customer History Page will not be available due to an error caused by Oracle. We are working closely with them to resolve this issue. Estimated fix is PUM-55 on 12/01/2025.

Navigation

Main Menu > Accounts Receivable > Customer Accounts > Customer Information > Customer History

Image: Customer History Page



Work Around

TBD

QRG

N/A

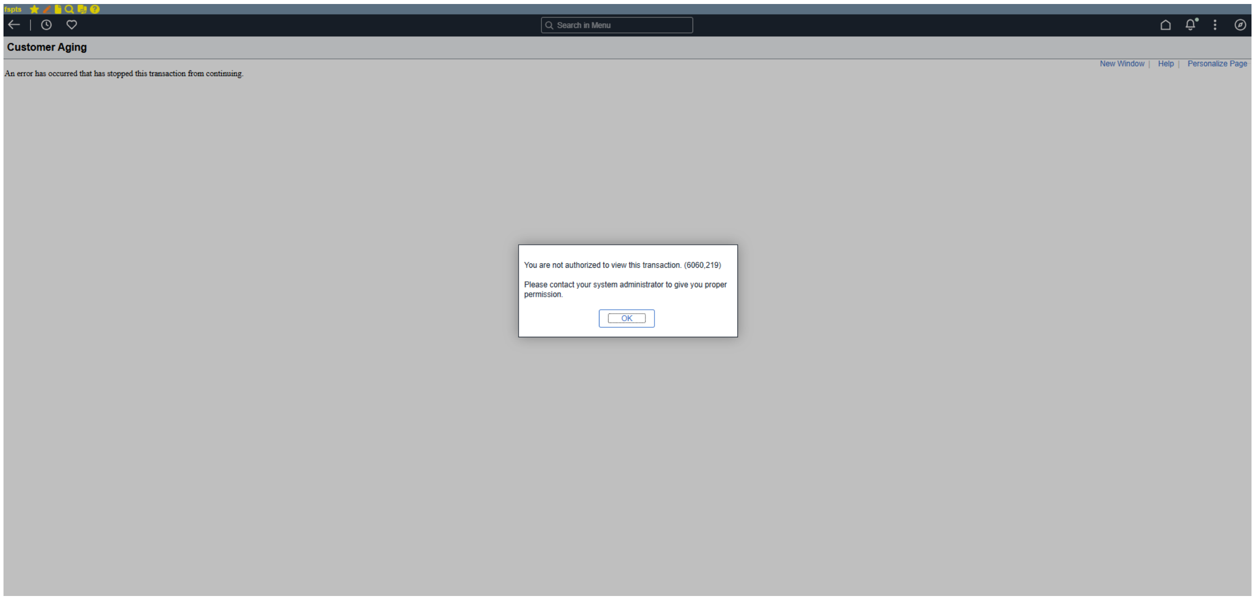
Customer Aging Page Error

The Customer Aging Page will not be available due to an error caused by Oracle. We are working closely with them to resolve this issue. Estimated fix is PUM-55 on 12/01/2025.

Navigation

Main Menu > Accounts Receivable > Customer Accounts > Customer Information > Customer Aging

Image: Customer Aging Page



Work Around

TBD

QRG

N/A

Asset Management

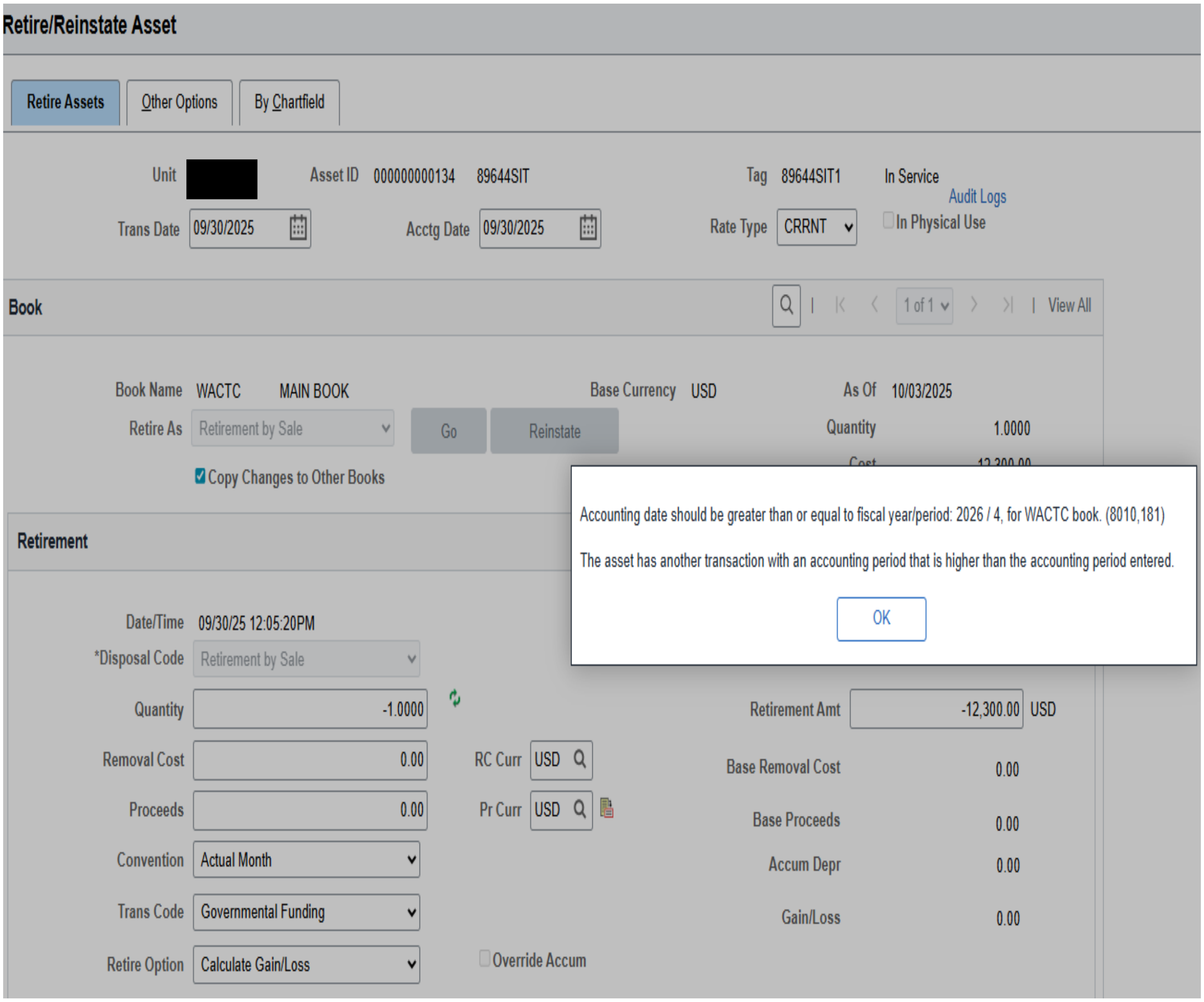
Asset’s Retirement Date Must Be After All Its Transfer Dates

When an asset is retired using an older date than an asset’s transfer date, the error message below pops up. ctcLink will not let the user proceed with the Retirement, unless the Retirement dates are changed to a date after/more recent than all its Transfer dates.

Navigation

Asset Management> Asset Transactions> Asset Disposal> Retire/Reinstate Asset

Image: Retire/Reinstate Asset Page Showing Error Message



QRG

[Retire and Reinstate Assets](#)

Fluid Workcenter Number Transaction in Pending Column

In the Asset Management (AM) fluid WorkCenter, Transaction Loader can be used to enter and modify asset data. Click on the number in the Transactions Pending column to review and make changes to individual asset data before it is loaded into AM.

Navigation

Asset Management Homepage > Asset Management Tile

Image: Asset Management Workcenter Transaction Loader

Click on the “4” in the Transactions Pending column, to view Review Transactions, where asset data can be modified or excluded (if Load Status is “Excluded”, the transaction cannot be uploaded into AM).

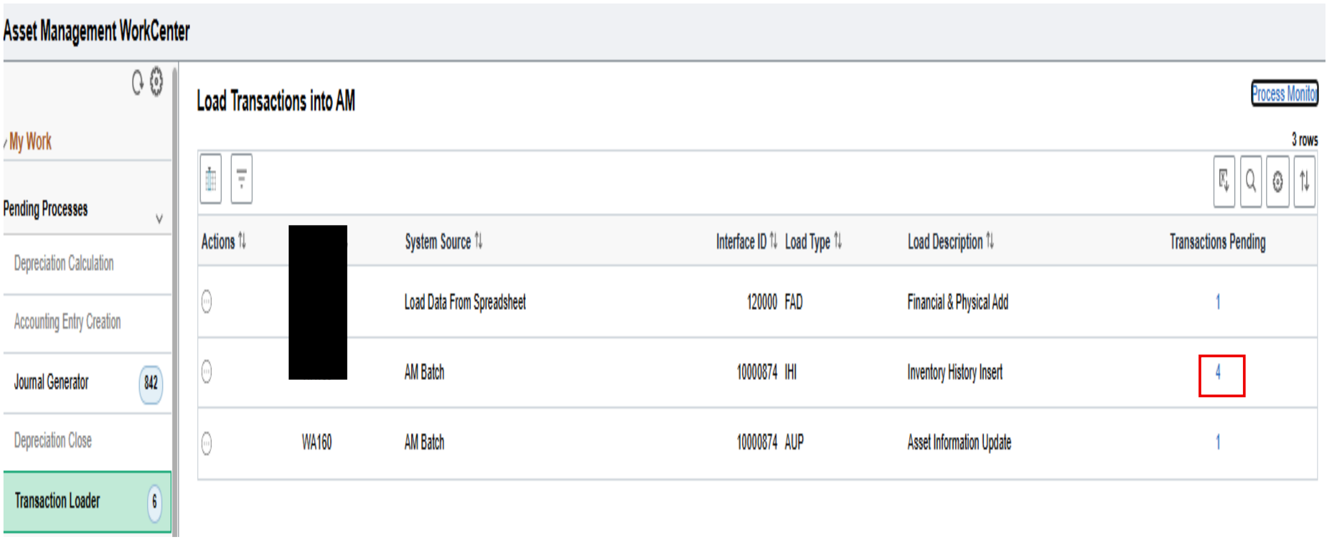


Image: Review Interface Transactions

Review Interface Transactions:

Interface ID	Interface Line Number	Business Unit	Asset Identification	Voucher ID	Voucher Line Number	PO Number	Receipt Number	Project	System Source	Trans Load Type	Physical Inventory ID	Transaction	Description	Serial ID	Load Status	Auto Approval Status	
10000874	0	WA160	000000000007	(blank)	0	(blank)	(blank)	(blank)	AM Batch	PI History	SITREG160	PI7 - Inventory History Insert	(blank)	(blank)	Pending	N	›
10000874	0	WA160	000000000008	(blank)	0	(blank)	(blank)	(blank)	AM Batch	PI History	SITREG160	PI7 - Inventory History Insert	(blank)	(blank)	Pending	N	›
10000874	0	WA160	000000000009	(blank)	0	(blank)	(blank)	(blank)	AM Batch	PI History	SITREG160	PI7 - Inventory History Insert	(blank)	(blank)	Pending	N	›
10000874	0	WA160	000000000010	(blank)	0	(blank)	(blank)	(blank)	AM Batch	PI History	SITREG160	PI7 - Inventory History Insert	(blank)	(blank)	Pending	N	›

QRG

[Using AM WorkCenter]

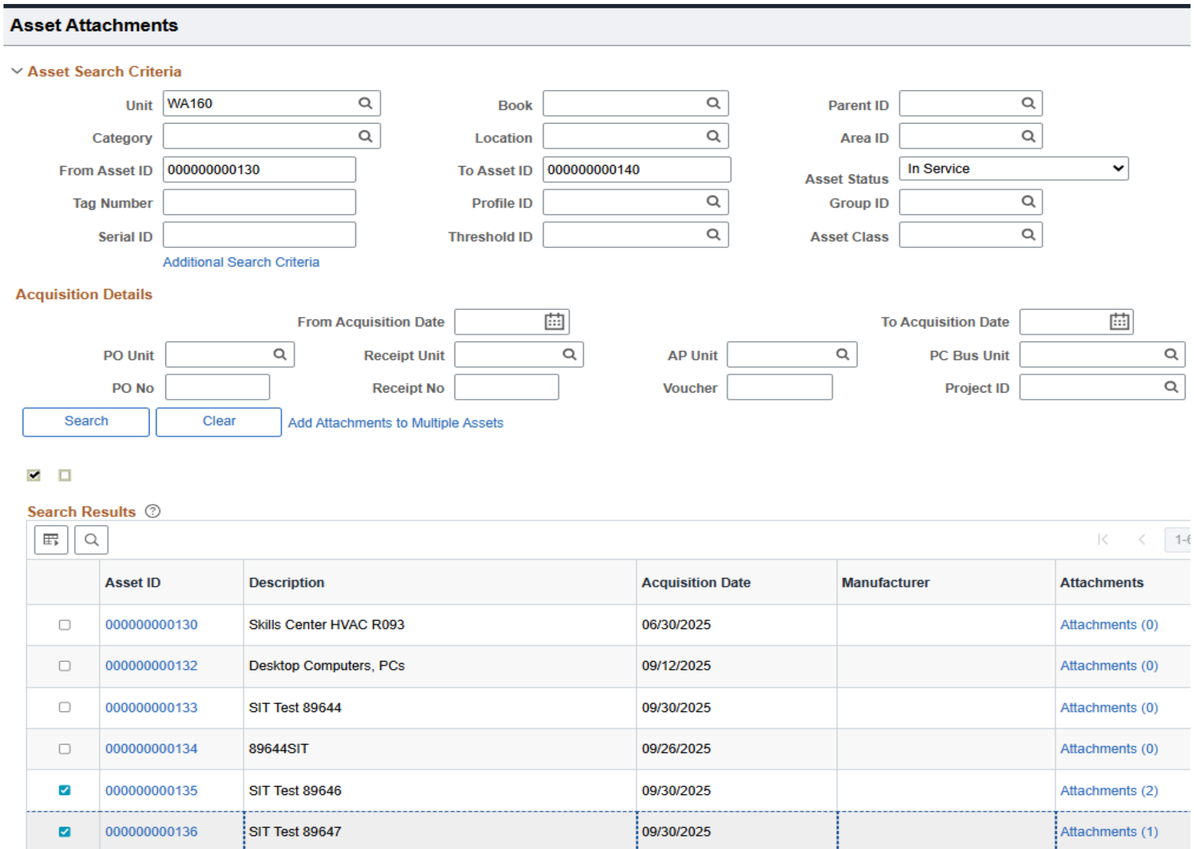
New Feature - Upload Attachment(s) to Multiple Assets

This is a new feature in Asset Management. Enter the selection criteria to identify the assets that need the attachment(s). Use the “Add Attachments to Multiple Assets link” to attach the file(s) to all the assets selected. The Attachments column will show a link to the attachment.

Navigation

Asset Management > Asset Transactions > Asset Attachments > blue link “Add Attachments to Multiple Assets”

Image: Asset Attachments



QRG

[Upload Attachment(s) to Multiple Assets](#).

New Feature - Create QR or BAR codes in AM to Scan Assets Using a Phone/Device

Asset Management prints QR and/or Bar codes to attach to assets to simplify inventorying them. Cell Phones and devices can read the QR and Bar codes Asset Management creates, eliminating the need for secondary software or devices to perform physical inventory.

Navigation

Asset Management > Physical Inventory > Print QR/Bar Code

Image: QR Code

The size of the QR or Bar code can be modified to align with the sticker size you choose. Users can select if the QR or Bar code shows the Tag # or the Serial # of the asset below the code.

SIT89644

This QR code has the Tag # at the bottom

QRG

[Create QR or BAR codes in AM to Scan Assets Using a Phone/Device]

Users Can Delete Attachments Added by Other Users

In Asset Management, a user can remove an attachment to an asset that was added by another user.

Navigation

Asset Management > Asset Transactions > Owned Assets > Basic Add, General Information tab/page

Image: Basic Add General Information Attachment Hyperlink

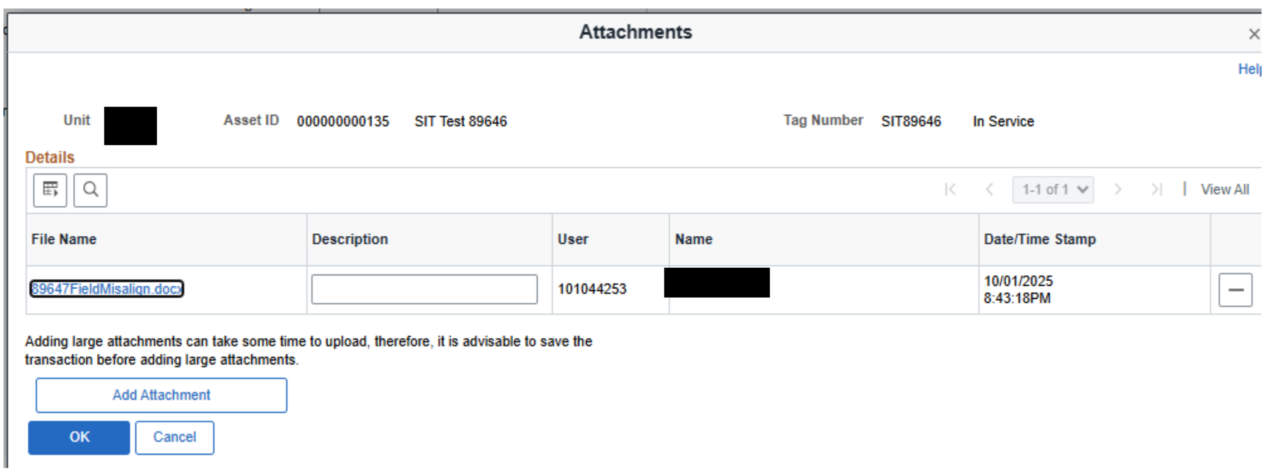
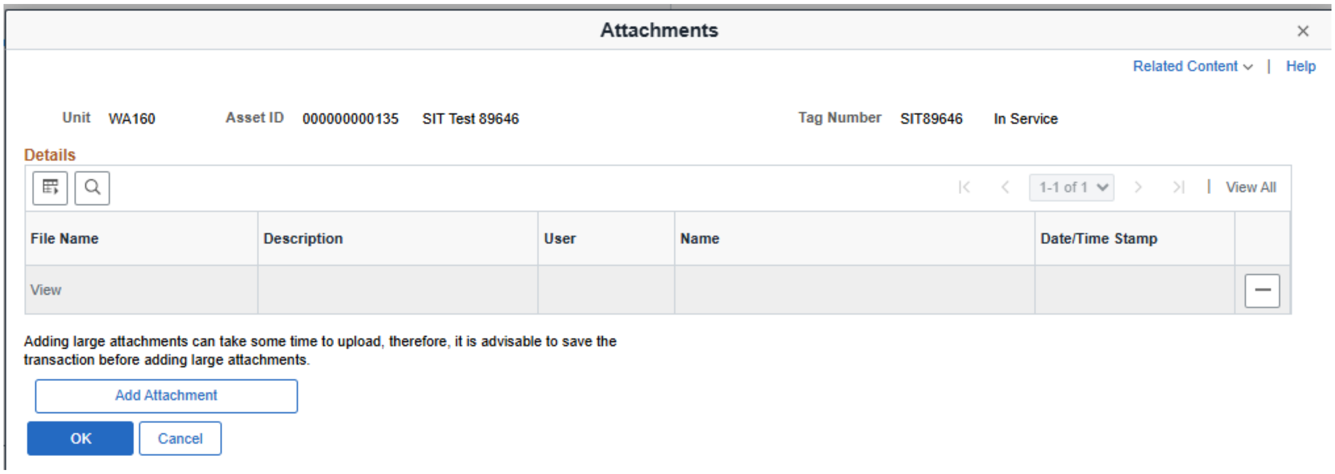


Image: Basic Add General Information Attachment Hyperlink

As another user, I removed the attachment added.



QRG

[Delete Attachments Added by Other Users]

Washington State Board for Community and Technical Colleges