

Creating an FM

OPPM Job Aid



OPPM
Office of Procurement and
Property Management

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Introduction

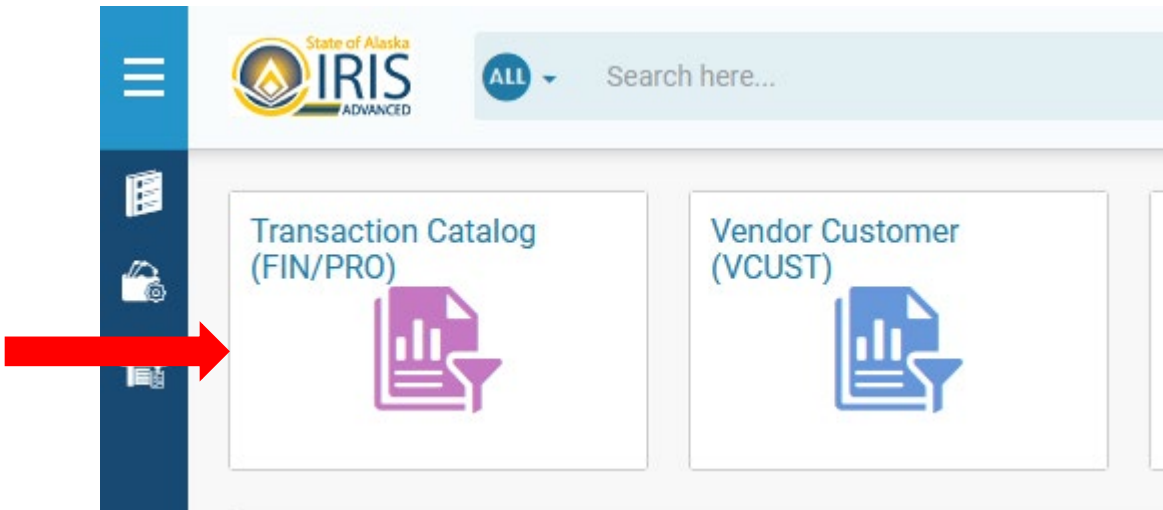
An FM is used to make modifications to property from the IRIS active register. An FM should be utilized to update items such as general information, responsibility center, classification, description information.

Creating an FM

Click on your name and change your Role to “Procurement.”

A screenshot of a user profile dropdown menu in a system interface. The user's name is JONATHON HARSHFIELD, and their current role is Procurement. The dropdown menu lists several roles: My Roles, Employee, Manager, Financial, Procurement (highlighted with a red arrow), and HRM Advanced. There is also a Sign out button at the bottom of the menu. The background shows a navigation bar with icons for home, favorites, notifications, and help, and a user profile card with the name JONATHON HARSHFIELD and role Procurement.

Then click on the Transaction Catalog.



In the Transaction Code box, type FM in the Transaction Code Box, enter the Department, and click on Create.

Financial Transaction ☆ ← Back Create

Search

| | | |
|--------------------------|------------------------|--------------------------|
| Transaction Code FM | Transaction Dept 02 | Transaction Unit |
| Transaction ID | Transaction Phase | Transaction Status |
| Transaction Function | Create User ID | Created On MM/DD/YYYY |

Show More Search Reset

In the Create Transaction window, check the “Auto Numbering” box and enter the Transaction Unit, then click “Continue”.

Create Transaction Continue Cancel

* Required fields

| | | |
|--------------------------|--|--------------------------|
| * Transaction Code FM | * Transaction Dept 02 | Transaction Unit 5066 |
| * Transaction ID | <input checked="" type="checkbox"/> Auto Numbering | |




Show More

A new FM will open. Note the FM Transaction ID at the top of the screen.





Fixed Asset Modification (FM) | Draft |



Department: 02 | Unit: 5066 | **Transaction ID: 230000766** | Version: 1

In this new FM, click the “Show More” arrow at the bottom of the General Information section and enter Transaction Name, Fixed Asset Number, Transaction Description, Fixed Asset Description, and select “FA05” as the Event Type.

Fixed Asset Modification (FM)  | Draft  | 


Department: 02 | Unit: 5066 | Transaction ID: 230000771 | Version: 1


   

Created By: 339025 | Created On: 01/13/2023 | Modified By: 339025 | Modified On: 01/13/2023


General Information



Transaction Name: Change # 1 


Record Date: MM/DD/YYYY 

Budget FY:



Fiscal Year: Period:



Transaction Description: Add Assignee Employee 

Fixed Asset Number: CNV0026603  






Fixed Asset Description: CANON EOS 7D CAMERA 


New Fixed Asset Description:

Event Type: FA05  

Then click “Save”.



Once you have saved the transaction, you can now make any changes to the asset you would like.

In this example, an Assignee Employee was added to the asset.

Responsibility Center Staff

Custodian: PAO

Assignee Employee Number: -

Assignee Employee Name: -

Driver's License Number: -

Use Code: -

New Custodian: 

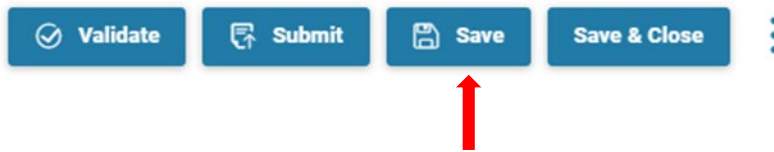
New Assignee Employee Number: 337217

New Assignee Employee Name: Marcus Andrews

New Driver's License Number: 9077543400 Phone

New Use Code:

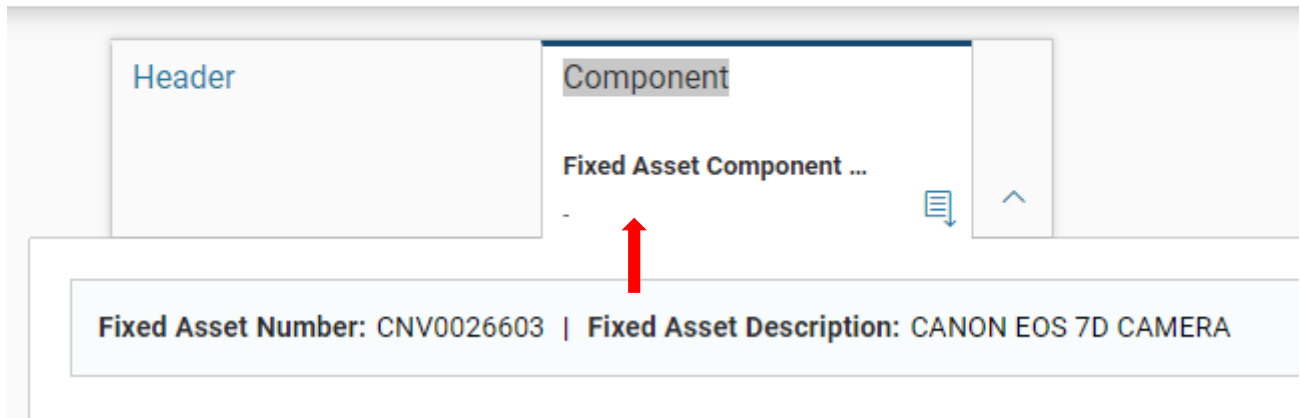
Changes can be made to the General Information, Inventory and Valuation, Responsibility Center Staff, Classifications, Depreciation, and Extended Transaction Description areas. Once the needed changes are completed, click “Save”.



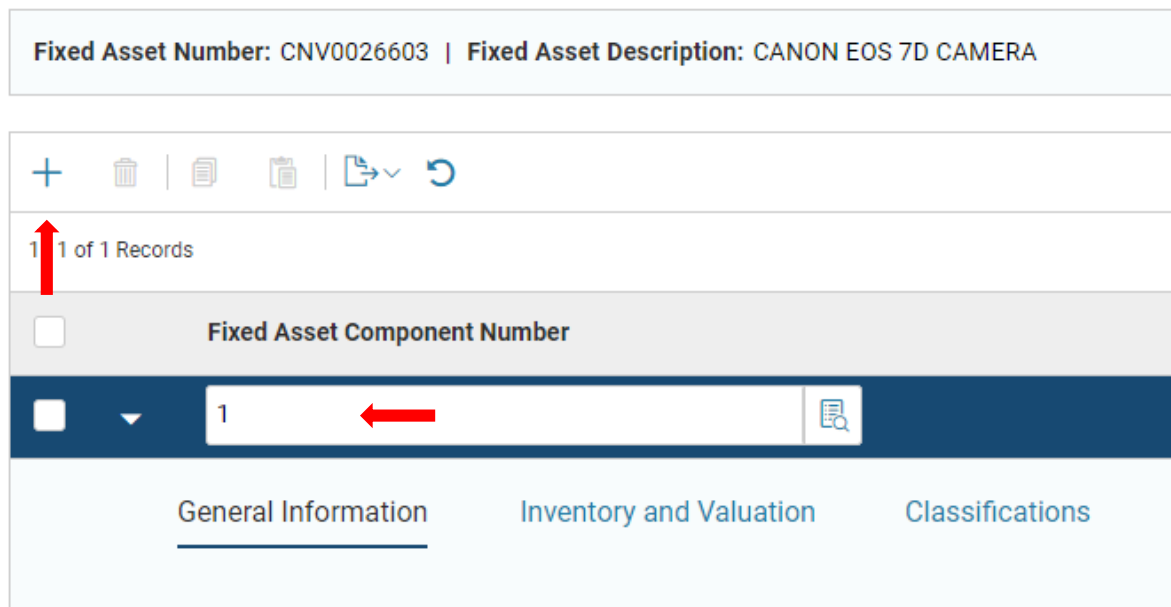
Next, click on the “Component” tab next to the “Header” tab.

Fixed Asset Modification (FM) ☆ | Draft |

Department: 02 | Unit: 5066 | Transaction ID: 230000766 | Version: 1



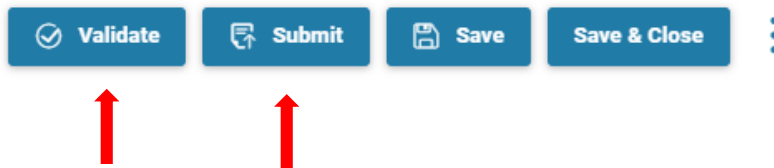
Click the plus sign and add a “1” in the Fixed Asset Component Number box and click “Save”.



The Commodity box will auto populate. Select any of the tab's in which changes are needed and ensure that after each change the "Save" button is clicked.

The screenshot displays a web-based form for editing a Fixed Asset Component. At the top, there are navigation elements including a search bar, a 'View per Page' dropdown set to 20, and a 'Page 1 of 1' indicator. The main header contains 'Fixed Asset Component Number' (with a dropdown menu) and 'Commodity' (with a text input field containing 'CNV'). Below the header, a series of tabs are visible: 'General Information', 'Inventory and Valuation', 'Classifications', 'Descriptive Details', 'Specifications', 'Location', 'Depreciation', 'Insurance', and 'Acquisition and Disposition'. The 'General Information' tab is selected, showing several input fields. Red arrows point to the 'New Commodity' field, the 'Units' field (containing '1.00000'), the 'New Units' field, the 'New Unit of Measure' field (containing 'EA'), and the 'New Component Extended Description' field (containing 'CAMERA, DIGITAL').

Once all needed changes/modifications are made to the asset, click "Validate" and "Submit"



The Transaction will now travel through the approval process.