When an existing asset item is re-assigned from one staff member to another, the assignment details must be changed to reflect the new person’s details against the asset record in the Asset Register. This reference card covers the steps required to update the asset record with the new person’s details.

**Changing the staff member assigned to an asset**

1. Log in using **UOM Data Entry** or **UOM Manager** responsibility and navigate to **Assets > Assets > Asset Workbench**

   The Find Assets screen will display.

2. Search for the asset item that is to be reassigned

   Enter the asset number into the Asset Number field and click the **Find** button.

   The retrieved asset record will display.

   At this point you can attach supporting documents using the “Paperclip” icon in the top toolbar, if required.

   **Note:** refer to the Adding Attachments to a Themis Record reference card for detailed instructions.

3. Click the **Assignments** button on the bottom of the screen

   The Assignments screen displays showing the current asset assignment information.

4. Enter an assignment change reason into the Comments field.

   For our re-assignment example, the description might read “Assign to Mr Alf A Romeo”

   **Note:** the comment entered will be stored in the asset’s record history.

5. Change the assignment record.

   To change an existing assignment record, the current assignment line must be reversed and re-entered with the new details.

   Reverse the current assignment by entering “-1” into the Unit Change field on the first line.

   Create a new line by entering “1” into the Unit Change field on the second line.

   Complete the assignment details for the new person.

6. **Complete the assignment fields as indicated.**

<table>
<thead>
<tr>
<th>Field</th>
<th>Action</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter the person’s name to which the asset has been re-assigned.</td>
<td><strong>Note:</strong> you can type part of their surname then press Tab on the keyboard, or use the List of Values (LOV) icon and search by surname in the staff list.</td>
</tr>
<tr>
<td>Number</td>
<td>The employee ID number defaults based on the person’s name entered above.</td>
<td></td>
</tr>
<tr>
<td>Expense Account</td>
<td>Copy the Expense Account details from the line above. To do so, click into the line 2 Expense Account field and press Shift + F5 on the keyboard.</td>
<td><strong>Note:</strong> some segments of the account may require changing to reflect the area in which the new person is located within the department. However, the budget unit should not be changed, as the owning department remains the same.</td>
</tr>
<tr>
<td>Field</td>
<td>Action</td>
<td>Comment</td>
</tr>
<tr>
<td>---------------</td>
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<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Location</td>
<td>Using the LOV enter the <strong>Campus</strong>, <strong>Building</strong> and <strong>Room</strong> details, then click <strong>OK</strong></td>
<td>The <strong>Campus</strong> field can be entered directly if known or searched for using the % wildcard. The <strong>Building</strong> reference number can be searched using a % wildcard either side of a shortened building address. <strong>For example:</strong> if searching for 258 Queensberry Street, type %258 Queen% Enter the specific location of the equipment against the <strong>Room</strong> field, this may be a floor within the building, a desk location number if assigned or a specific room number.</td>
</tr>
</tbody>
</table>

7. Click the **Done** button to save the assignment changes.

8. A message confirming the changes will display, click **OK**. The Assets screen will be returned.