Fixed Asset Workflow

Equipment Location Change

Accounting Office
February 2014
• Equipment Location Change Workflow is an online process for changing an equipment location within an organization.

• It can only be initiated by designated Equipment Representatives.

• If you are not an Equipment Representative, please ask your Financial Manager to sign you up through the Finance Program Guide (bf.memphis.edu/spectrum/users).
The list of current equipment representatives can be viewed at http://bf.memphis.edu/spectrum/eqreps.php
Important Notes before Starting the Workflow

1. A valid 9-digit PTAG Code (decal #) is needed. Three different kinds of decals have been used:

   - **Standard decal.** Enter all 9 digits in Workflow.
   - **Drop the 1st zero and enter the rest of 9 digits in Workflow.**
   - **Add 3 zeros before entering the 6 digits in Workflow.**
2. Assets that were previously zero-valued, cannibalized, surplused, or disposed will not be processed (“D” or “C”).

Use Banner INB screen FFIMAST to check asset status.
To initiate the workflow, the Equipment Representative:

1. Log into the My Memphis Portal at [http://my.memphis.edu](http://my.memphis.edu)
2. Select the “Workflow” tab
3. Select Workflow type “UOM Equipment Location Change”.

![Workflow Worklist](image)
Enter decal number in “PTAG_CODE” field then click on “Start Workflow”

Note1: Workflow Specifics Name and Note are not required.
Note2: PTAG_CODE is 9 digit UOM decal number.
Click on “Back to Workflow Tab” OR “OK” to view your Worklist OR click on the link in the email that will be sent to you.

Start Workflow

The workflow was started successfully.

From: mcarter1@memphis.edu [mcarter1@memphis.edu]
Sent: Tuesday, January 17, 2012 10:06 AM
To: Michael L Carter (mcarter1)
Subject: Equipment Location Change - 011353700 - Enter New Location *** TBANR ***

Please login to Banner Workflow to enter the new location and transfer reason for the following equipment:
Decal #: 011353700
Description: Dell Computer Latitude D600
Make: Dell
Model: PPO5L
Serial Number: CTYTN31
Organization: 400000 - VP Student Affairs
Current Location: 100209 - Administration 222
Click the job on the Workflow Worklist to continue. (It may take a while to display the transaction on the Worklist. Click on “Refresh” if necessary.)
Verify the asset information, enter the new location code and enter the reason. Click “Complete” to finish the workflow.

Note 1: Fields with * are required.
Note 2: “Save & Close” - Save information but not complete.
Note 3: “Cancel” - Exit the current screen without saving what you’ve entered.
Location Codes

![Image of a webpage showing a form for entering location codes]

The following equipment is being transferred to your organization. Please enter a new location code for this equipment and accept the transfer or mark the transfer as "Declined" and enter a reason. Please contact Accounting if you have any questions about the location code.

- **Decal #:** 911748700
- **Description:** DELL OPTIPLEX GX620 COMPUTER
- **Make:** DELL
- **Model:** GX620
- **Serial Number:** GS766R3
- **Transaction Type:** Transfer Between Departments
- **Transfer Reason:** test
- **Previous Organization:** 232103 - CEPR D Lustig Test
- **Previous Location:** 103492 - Patterson Hall 111A
- **New Organization:** 235115 - HSS Barbara McManusen Test

**New Location Code (Must be 6 digits):**

*Click here* to search for a valid location code.

**Accept / Decline:**

- Accept
- Declined

**NOTE**

If you are Declining this equipment transfer, you must enter a reason in the "Reason Declined" field and enter either the Previous Location value or spaces into the New Location Code field.

www.memphis.edu
Type in any part of a building name and click “Search”. It will bring up a list of rooms in the building. Select the location codes from the first column.
A final email notification will be sent to you to notify you the process has been completed.

From: donotreply@memphis.edu [donotreply@memphis.edu]
Sent: Tuesday, January 17, 2012 10:08 AM
To: Michael L Carter (mcarter1)
Subject: Equipment Location Change - 011353700 - Completed *** TBANR ***

The location change for the following equipment has been processed:

Decal #: 011353700
Description: Dell Computer Latitude D600
Make: Dell
Model: PP05L
Serial Number: CTYTN31
Organization: 480000 - VP Student Affairs

Previous Location: 100209 - Administration 222
New Location: 111915 - FedEx Institute of Tech 226
Transfer Reason: we don't like it
Banner Fixed Asset System will be updated. You can use Banner INB screen FFIMAST to view whether the location is updated.
Questions?

Workflow Instructions:
http://bf.memphis.edu/spectrum/fahelp.php

Fixed Asset Workflow Helpdesk:
wf-fixedasset-admins@memphis.edu

Accounting Office: 678-2271