Fixed Asset Workflow

Equipment Transfer - Zero Value & Cannibalization

Accounting Office
February 2014
• Equipment Transfer Workflow is an online process for changing equipment location outside your organization. (Zero Value, Cannibalization, Surplus, Another Organization)

• It can only be initiated by designated Equipment Representatives.

• Needs Approval from relinquishing Financial Manager and Accounting.

• 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 decal number 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 Transfer”.
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 info, select the transaction type, enter the org code (current code), enter the transfer reason, and click “Complete”.

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.
The **Relinquishing Financial Manager** will receive an email with instructions to login to workflow to approve/decline the transfer.

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**From:** ilim@memphis.edu [mailto:ilim@memphis.edu]  
**Sent:** Tuesday, May 10, 2011 9:23 AM  
**To:** Rong Lin (ril)  
**Subject:** Equipment Transfer - 012076300 - Approve Transfer *** TBANR ***

Please log into [Banner Workflow](mailto:Banner Workflow) to access this workflow worklist item and approve/decline the following equipment transfer:

**Transfer Type:** Transfer Between Departments

**Decal #:** 012076300  
**Description:** 223-5982-OptiPlex 740 Small Form Factor, **AMD ATHLON**  
**Make:** Dell  
**Model:** Optiplex 740  
**Serial Number:** 61pfhh1  
**Current Organization:** 415000 - Health Center Test  
**Current Location:** 100252 - Administration 275  
**New Organization:** 512000 - Hotel Conference Center
Relinquishing Financial Manager selects the job from the Workflow Worklist to approve/decline the transfer, then accept/decline the transfer and click “Complete”.
If approved, the workflow will be sent to Accounting for approval and update. The following final notification email will be sent to the Equipment Representative.

From: donotreply@memphis.edu
Sent: Wednesday, July 18, 2012 12:37 PM
To: Rong Lin (rlin)
Subject: Equipment Transfer - 011748700 - Zero Value - Completed *** TBANR ***

Zero Value completed

Decal #: 011748700
Description: DELL OPTIPLEX GX620 COMPUTER
Make: DELL
Model: GX620
Serial Number: G979R91

Previous Organization: 235115 - HSS Barbara McClanahan Test
Previous Location: 103492 - Patterson Hall 111A

New Organization: 235115 - HSS Barbara McClanahan Test
New Location: 103492 - Patterson Hall 111A
Questions?

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

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

Accounting Office: 678-2271