

Fixed Asset Workflow

Equipment Location Change

Accounting Office
February 2020

- Equipment Location Change Workflow is an online process for changing an equipment's location **within** an organization.
- Only Equipment Representatives (ER) can **initiate** a workflow.
- ER's are assigned by the Financial Manager (FM) of the organization via the Finance Program Guide (bf.memphis.edu/spectrum/users). *Only one equipment representative can be assigned to an organization.*
- No additional approval is required.

The list of current equipment representatives can be viewed at <http://bf.memphis.edu/spectrum/eqreps.php>.



- FOAPALS
 - search by index
 - search by fund
 - search by organization
 - search by program
 - search by activity
 - search by multiple fields
 - search by orgn title
 - search by index title

- SIGNATURES
 - signatures by org
 - signatures by name
 - approval queues by org
 - approval queues by name
 - EPAF approval queues by name

- EQUIPMENT REPS
 - assign equipment reps
 - view equipment reps
 - fixed asset workflow help

- CODES
 - account code list
 - rule code list
 - location code search
 - program code list
 - data standards manual

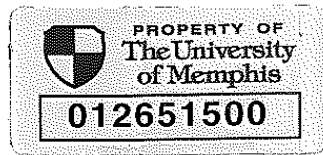
Equipment Reps List by Organization

- + 10000
- + 20000
- + 30000
- + 40000
- + 50000
- + 60000
- + 70000
- + 80000
- + 90000

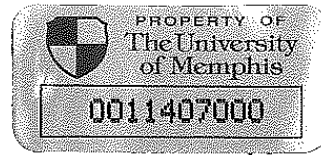
Narrow results displayed by entering any part of the organization code number, title, or equipment rep name below.

Important Notes before Starting the Workflow

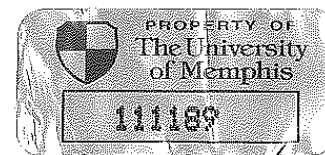
- PTAG_Code is an UOM Asset tag (also refers to a Permanent TAG, P-tag, Decal). This is a silver tag with UOM logo.
- A valid 9-digit PTAG Code (decal #) number is needed. Three different kinds of decals have been used.



Standard decal.
Enter all 9 digits
in Workflow.



Drop the 1st zero
and enter the rest of
9 digits in Workflow.



Standard decal.
Enter all 9 digits
in Workflow.

Use Banner INB screen FFIMAST to check asset status

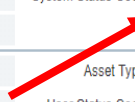
Assets that were previously zero-valued, cannibalized, surplused, or disposed of otherwise will have a “D” or “C” status and cannot be processed in Workflow.

Fixed Asset Master Query FFIMAST 9.3.6 (PROD)

Asset Tag: 011327300 Start Over

MASTER INFORMATION Insert Delete Copy Filter

Origination Tag	011327300	Permanent Tag Date	09/30/2003
Permanent Tag	011327300	Last Adjustment Date	
Primary Tag		Origination Tag	
Subordinate Type		Cancel Date	
Origination Tag Date	09/30/2003	System Status Code	D
Asset Description	Apple Computer Emac	Asset Type	NC Sensitive Items Not Capitalized
Commodity		User Status Code	
Unit of Measure			
Insurance Value		Replacement Value	
Market Value		Book Value	1,274.00
<input type="checkbox"/> Capitalization Indicator		<input type="checkbox"/> Tag In Use	
<input type="checkbox"/> Asset Text Exists		<input type="checkbox"/> Gift Indicator	
Cost	1,274.00	Net Book Value	0.00
Total Cost	1,274.00	Total Net Book Value	0.00



Use Banner INB screen FFIMAST to check organization

Be sure that you are ER for the Organization listed.

ellucian Fixed Asset Master Query FFIMAST 9.3.6 (PROD) ADD RETRIEVE RELATED TOOLS

Asset Tag: 011327300 Start Over

PROCUREMENT INFORMATION Insert Delete Copy Filter


Origination Tag	011327300	Permanent Tag	011327300	Apple Computer Emac
Vendor Code		Submission Number		
Purchase Order		Invoice Item		
Purchase Item		Cancel Date		
Receiver		Credit Memo		
Receiver Date		Installments		
Invoice		Recurring		
Invoice Date				

Other Source Data

Document		Document Tag Date	
Type		Source Submission	
Sequence			

Transfer Data

Date	07/23/2009	Grant	
COA	University of Memphis	Custodian ID	
Organization	235000 Health Studies	Equipment Manager	
Location	101774 Fieldhouse 361		



Location Code

Finance Program Guide - Type in any part of a building name and click “Search”. It will bring up a list of rooms in the building.

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Location Code Search

Enter all or part of the building name and click Code matches.

Search Location:

FOAPALS
search by index
search by fund
search by organization
search by program
search by activity
search by multiple fields
search by orgn title
search by index title

SIGNATURES
signatures by org
signatures by name
approval queues by org
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Finance Program Guide

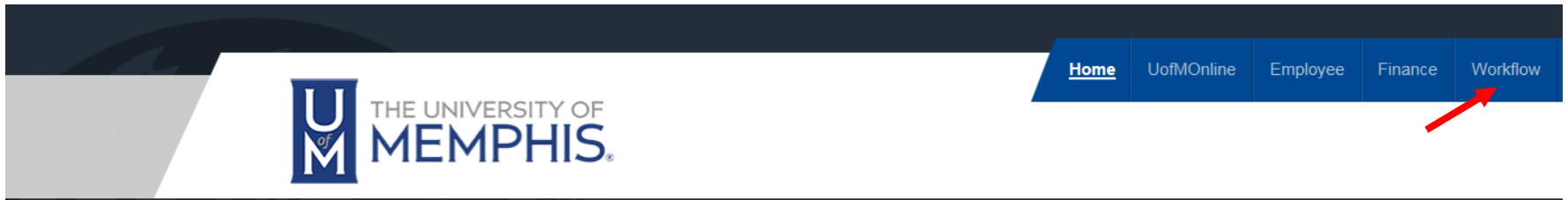
Location Code Results

201 record(s) found.

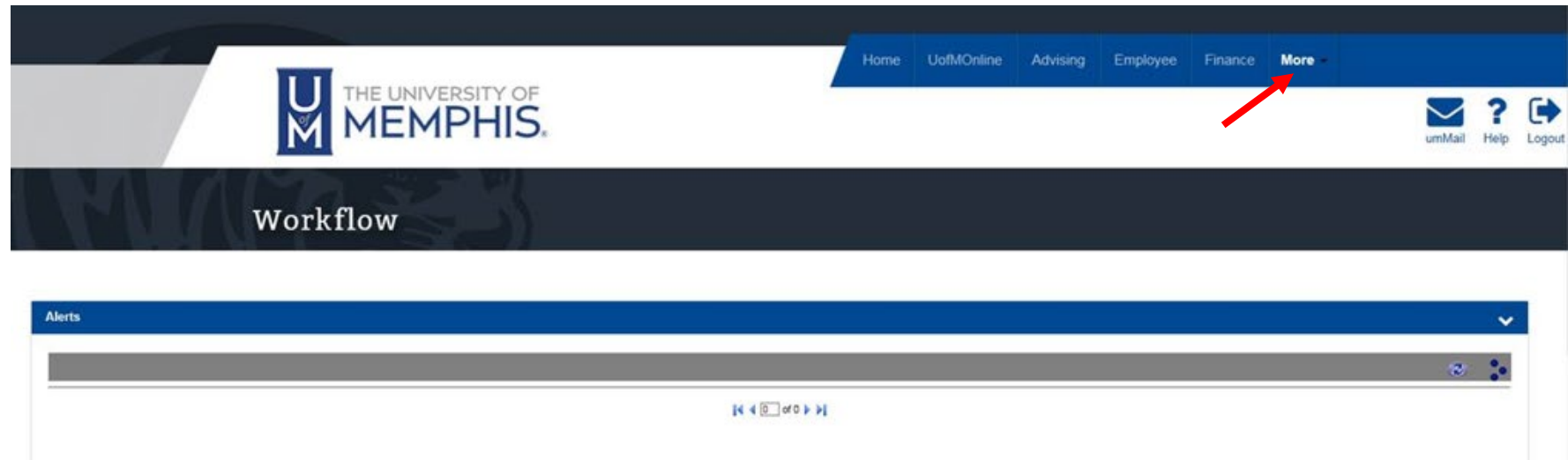
Location	Location Title	Location Pred	Location Pred Title
112694	Dunn Elementary School	925	Dunn Elementary School
925	Dunn Elementary School	Off	Off Campus
040	Dunn Hall	Main	Main Campus
105238	Dunn Hall 101	040	Dunn Hall
105239	Dunn Hall 103	040	Dunn Hall
105240	Dunn Hall 105	040	Dunn Hall
105241	Dunn Hall 106	040	Dunn Hall
105242	Dunn Hall 107	040	Dunn Hall
105243	Dunn Hall 109	040	Dunn Hall
105244	Dunn Hall 111	040	Dunn Hall
105245	Dunn Hall 113	040	Dunn Hall
105246	Dunn Hall 115	040	Dunn Hall
105247	Dunn Hall 117	040	Dunn Hall
105248	Dunn Hall 118	040	Dunn Hall
105249	Dunn Hall 119	040	Dunn Hall
105428	Dunn Hall 120	040	Dunn Hall
105250	Dunn Hall 120A	040	Dunn Hall
105429	Dunn Hall 120B	040	Dunn Hall

To initiate the workflow, the **Equipment Representative**:

- Log into the My Memphis Portal at <http://my.memphis.edu>.
- Select the “Workflow” tab.



OR



Scroll down

Worklist

0 of 0

Alerts

0 of 0

My Processes

No Processes found.

OR

My Processes

UOM

- [UOM Equipment Location Change](#)
- [UOM Equipment Transfer](#)

- Scroll down to “My Processes” and select the three dots.
- Select Workflow type “UOM Equipment Location Change”.

The screenshot displays the 'My Processes' interface. At the top, a blue header bar contains the text 'My Processes' and a dropdown arrow. Below this, a grey bar shows 'No Processes found.' with a three-dot menu icon on the right, indicated by a red arrow. On the left side, there are three main navigation sections: 'Home' (with sub-items: Worklist, Workflow Status Search, Workflow Alerts), 'User Profile' (with sub-items: My Processes, User Information, Change Password), and 'Administration' (with sub-items: User Management, Banner Workflow Modeler, Workflow System Administration). A red arrow points to the 'My Processes' item in the 'User Profile' section. The main content area is titled 'My Processes' and lists two items under the 'UOM' category: 'UOM Equipment Location Change' and 'UOM Equipment Transfer'. A red arrow points to the first item.

Enter decal number in “PTAG_CODE” field then click on “Start Workflow”.

Organization: UOM
Workflow Name: UOM_FIN_EQUIP_TRANSFER:1
Workflow Specifics Name:
Priority: Normal ▾
Workflow Note:

Required Parameters

* PTAG_CODE:

Start Workflow Reset Cancel

Attachments

Attach File

Note1: Workflow Specifics Name and Note are not required.

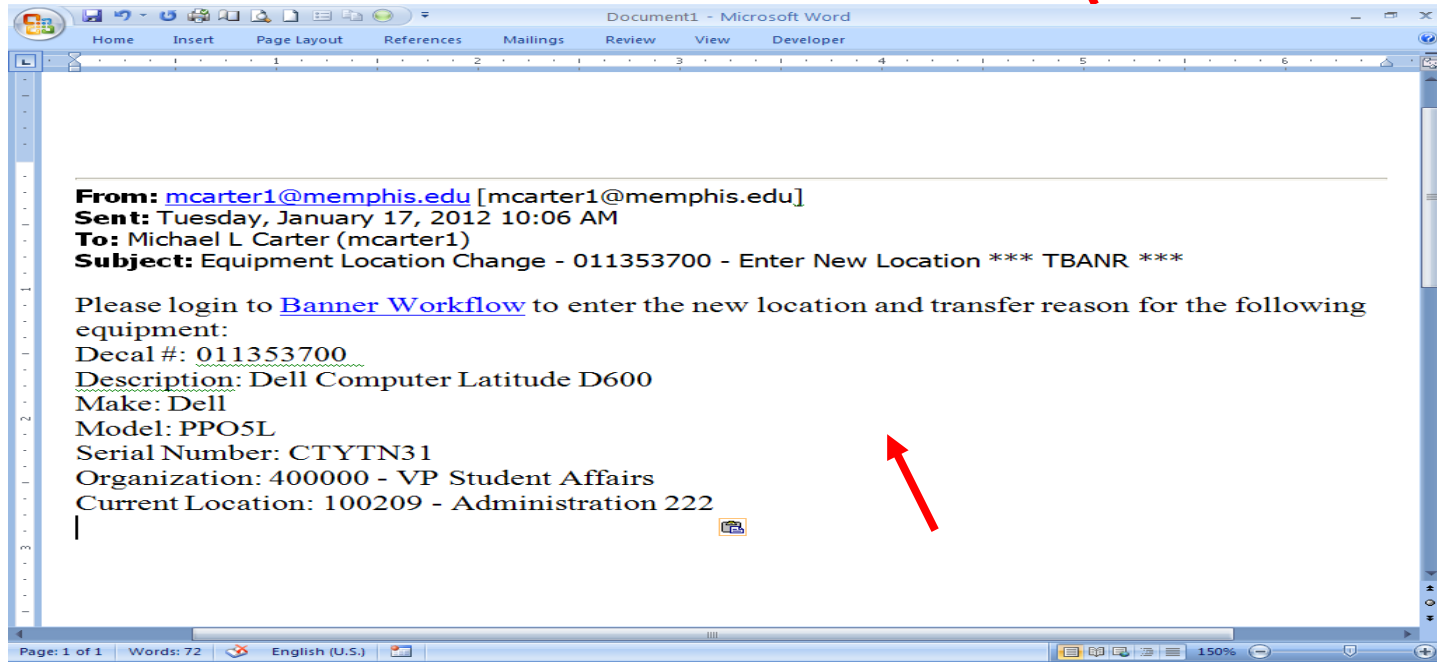
Note2: PTAG_CODE is 9 digit UOM decal number.

Click "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.

OK



Click the job on the Workflow Worklist to continue.

Home

- Worklist
- Workflow Status Search
- Workflow Alerts

User Profile

- My Processes
- User Information
- Change Password

Administration

- User Management
- Banner Workflow Modeler
- Workflow System Administration

Worklist Logoff Help

Organization	Workflow	Activity	Priority	Created
UOM	Equipment Location Change - 012300200 Ready	Enter Correct PTAG	Normal	27-Mar-2017 02:54:39 PM

1 - 1 of 1 | First | Previous | Next | Last | Go to page: 1

[Show Reserved Items](#)

Verify the asset info, enter the new location code and enter the reason for location change. Click “**Complete**” to finish the workflow.

*Required Field
*** TBANR ***

Please enter a new location code and location change reason for this equipment or stop the workflow:

Decal #:	011748700
Description:	DELL OPTIPLEX GX620 COMPUTER
Make:	DELL
Model:	GX620
Serial Number:	G979R91
Organization:	232103 - CEPR D Lustig
Current Location:	103492 - Patterson Hall 111A

* New Location Code (Must be 6 digits):

[Click here](#) to search for a valid location code.

* Location Change Reason (Max: 150 Char):

* Stop Workflow:

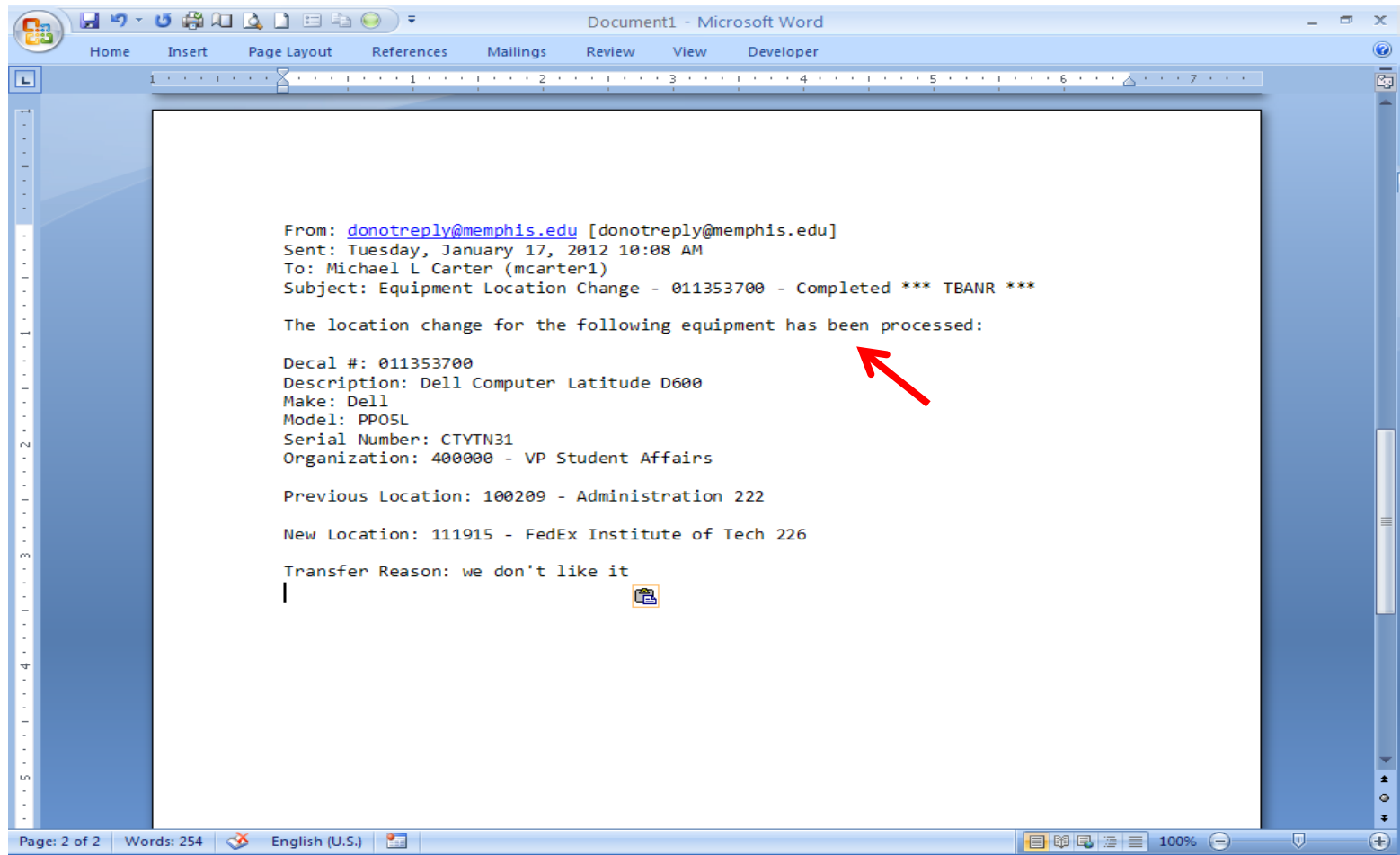
NOTE
If you are Stopping this workflow, you must enter spaces or valid values in the New Location Code and Location Change Reason fields.

Note 1: Fields with * are required.

Note 2: “Save & Close” - will save information but **not complete**.

Note 3: “Cancel” - exit the current screen without saving what you’ve entered

You are done with the location change. The workflow will update Banner and a final notification email will be sent to the Equipment Representative.



Banner Fixed Asset System will be updated. You can use Banner INB screen FFIMAST to view whether the location is updated.

Fixed Asset Master Query FFIMAST 9.3.6 (PROD)

Asset Tag: 000078925

PROCUREMENT INFORMATION

Origination Tag	000078925	Permanent Tag	000078925	#058 - 1986 GMC Suburban
Vendor Code		Submission Number		
Purchase Order		Invoice Item		
Purchase Item		Cancel Date		
Receiver		Credit Memo		
Receiver Date		Installments		
Invoice		Recurring		
Invoice Date				
Other Source Data				
Document		Document Tag Date		
Type		Source Submission		
Sequence				
Transfer Data				
Date	02/19/2020	Grant		
COA	U University of Memphis	Custodian ID		
Organization	860000 General Plant	Equipment Manager		
Location	112218 Building 45 Central Receiving 278			



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

Accounting Office: 678-2271