Fixed Asset Workflow

Equipment Transfer - Transfer Between Organizations

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

• It can only be initiated by designated Equipment Representatives.

• Needs Approval from relinquishing Financial Manager.

• 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.**
  - 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: PP05L
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 “Transfer Between Departments” transaction type, enter transfer reason and enter new organization code. Click on ‘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.
Relinquishing Financial Manager selects the job from the Workflow Worklist to approve/decline the transfer, then accept/decline the transfer and click “Complete”.
After the Relinquishing Financial Manager’s approval, an email will be sent to the Receiving Equipment Representative notifying of the transfer.

From: sprhlthn@memphis.edu
Sent: Friday, January 20, 2012 1:57 PM
To: Michael L Carter (mcarter1)
Subject: Equipment Transfer - 011551700 - Enter New Location *** TBANR ***

The following equipment is being transferred to your organization. Please log into Banner Workflow to access this worklist item to enter a new location code for this equipment and 'Accept' the transfer or mark the transfer as 'Declined' and enter a reason.

Decal #: 011551700
Description: Dell Computer Latitude Laptop
Make: Dell
Model: Latitude X
Serial Number: JPCBJ71
Previous Organization: 286000 - Vice Provost Extended Programs
Previous Location: 112688 - Temporary Off Campus
New Organization: 400000 - VP Student Affairs
Receiving Equipment Representative needs to verify the information, enter the new location code, accept/decline the transfer and click “Complete” to finish the workflow.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decal #:</td>
<td>011748700</td>
</tr>
<tr>
<td>Description:</td>
<td>DELL OPTIPLEX GX620 COMPUTER</td>
</tr>
<tr>
<td>Make:</td>
<td>DELL</td>
</tr>
<tr>
<td>Model:</td>
<td>GX620</td>
</tr>
<tr>
<td>Serial Number:</td>
<td>G9799R91</td>
</tr>
<tr>
<td>Transaction Type:</td>
<td>Transfer Between Departments</td>
</tr>
<tr>
<td>Transfer Reason:</td>
<td>text</td>
</tr>
<tr>
<td>Previous Organization:</td>
<td>232103 - CEPR D Lustig Test</td>
</tr>
<tr>
<td>Previous Location:</td>
<td>103492 - Patterson Hall 111A</td>
</tr>
<tr>
<td>New Organization:</td>
<td>235115 - HSS Barbara McClanahan Test</td>
</tr>
</tbody>
</table>

Note 1: If you decline, use the current location code as it’s a required field.
Note 2: You must enter a reason if you decline to accept the transfer.
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: GS-99881
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 McLanahan Test

*New Location Code (Must be 6 digits):

Click here to search for a valid location code.

* Accept / Decline:

Reason Declined:

**NOTE**
If you are Declining this equipment transfer, you must enter a reason in the the Reason Declined field and enter either the Previous Location value or spaces into the New Location Code field.
Type in any part of a building name and click “Search”. It will bring up a list of rooms in the building.
After accepting, the workflow will update Banner and a final notification email will be sent to Relinquishing Equipment Representative, Receiving Equipment Representative, and Receiving Financial Manager.

From: donotreply@memphis.edu

Sent: Friday, January 20, 2012 2:02 PM

To: Sri Prahalathan (sprhlthn)
Cc: Michael L Carter (mrcarter1)

Subject: Equipment Transfer - 011551700 - Transfer Between Departments - Completed *** TBANR

Transfer Between Departments action completed.
Decal #: 011551700
Description: Dell Computer Latitude Laptop
Make: Dell
Model: Latitude X
Serial Number: JPCBJ71
Previous Organization: 286000 - Vice Provost Extended Programs
Previous Location: 112688 - Temporary Off Campus
New Organization: 400000 - VP Student Affairs
New Location: 100188 - Administration 209A

*** TBANR ***
Questions?

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

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

Accounting Office: 678-2271