Fixed Asset Workflow

Equipment Transfer - Surplus

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

• It can only be initiated by designated Equipment Representatives.

• Needs Approval from relinquishing Financial Manager and Surplus.

• 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

<table>
<thead>
<tr>
<th>Equipment Reps List by Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expand All</td>
</tr>
<tr>
<td>+ 10000</td>
</tr>
<tr>
<td>+ 20000</td>
</tr>
<tr>
<td>+ 30000</td>
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<tr>
<td>+ 40000</td>
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<td>+ 50000</td>
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<tr>
<td>+ 60000</td>
</tr>
<tr>
<td>+ 70000</td>
</tr>
<tr>
<td>+ 80000</td>
</tr>
</tbody>
</table>

Narrow results displayed by entering any part of the organization code number, title, or equipment rep name below.
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
If the item is not an active inventory item you can go straight to physical plant’s website and complete the form. Please include a copy of the FFIMAST screen shot.
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.
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, select the “Surplus” transaction type, enter 860000 for organization code and enter the transfer reason. Click on “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.
The Relinquishing Financial Manager will receive an email with instructions to login to workflow to approve/decline the transfer.

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

Please log into 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 financial manager approves, the **Equipment Representative** will receive the following email asking to create a Work Order. Click on the link to go to the Work Order System.

```plaintext
From: sprhltthn@memphis.edu [mailto:sprhltthn@memphis.edu]
Sent: Tuesday, January 17, 2012 11:13 AM
To: Sri Prahalathan (sprhltthn)
Subject: Equipment Transfer - 000094720 - Create Work Order *** TBANR ***

Please Create a Work Order for SURPLUS

[Work Order System]

Decal #: 000094720
Description: Sony Recorder
Make: Sony
Model: PVW2800
Serial Number:
Organization: 286000 - Vice Provost Extended Programs
Location: 105723 - Meeman Journalism Building 329B

Please mark this work item completed in Banner Workflow once the work order has been created.
```
Or you may select the job from the Worklist, and click on the link to create the work order.
Once the work order is created, you will receive an email with the Equipment Surplus Transaction Form. Print the form and have it ready when the item is picked up by Surplus personnel. Surplus personnel will finish the Workflow, and you will receive a final notification of the completion of the surplus.

<table>
<thead>
<tr>
<th>Decal #</th>
<th>Location</th>
<th>Description</th>
<th>Operable</th>
</tr>
</thead>
<tbody>
<tr>
<td>000094720</td>
<td>105723 - Meeman Journalism Building 329B</td>
<td>Description: Sony Recorder Make: Sony Model: PVW2800 Serial Number:</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Important note: remember to go back to Workflow to Complete the task once the work order is submitted.
Questions?

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

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

Accounting Office: 678-2271