Fixed Asset Workflow

Zero Value or Cannibalization

&

Surplus

Accounting Office
February 2020
• The Equipment Transfer Workflow is an online process to Zero Value (or Cannibalize) eligible equipment.

• 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.

• Approvals from both the Financial Manager of the org and the Accounting Office are required to complete workflow.
The list of current equipment representatives can be viewed at [http://bf.memphis.edu/spectrum/eqreps.php](http://bf.memphis.edu/spectrum/eqreps.php).
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.
Use Banner INB screen FFIMAST to check organization

Be sure that you are ER for the Organization listed.
To initiate the workflow, the **Equipment Representative**:

- Log into the My Memphis Portal at [http://my.memphis.edu](http://my.memphis.edu).
- Select the “Workflow” tab.
Scroll down

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 Transfer”.

![Image of My Processes section with arrows pointing to the options](image-url)
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 “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

Equipment Transfer -013253500 - Enter Transfer Details

tmagueyl@memphis.edu
To: Christina L. Maguey (tmagueyl)

Links and other functionality have been disabled in this message. To turn on that functionality, move this message to the Inbox.
We removed extra line breaks from this message.
We converted this message into plain text format.

Thu 2/20/2020 12:42 PM

Please login to Banner Workflow <https://my.memphis.edu> to access this worklist item and enter the transfer details for the following equipment:

- Decal #: 013253500
- Description: OptiPlex 7440 AIO
- Make: Dell
- Model: OptiPlex 7440 AIO
- Serial Number: CPQRGB2
- Amount: $972.54
- Original Organization: 340000 - Technology Access Fee Original Location: 13261 - Collierville Center 100
Click the job on the Workflow Worklist to continue.
Verify the asset information, select the “Zero Value” or “Cannibalization” transaction type, enter current Org. Code in “New Org. Code” field and enter transfer reason. Click on “Complete” to finish the workflow.

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.
Note 4: Use “Cannibalization” only if parts of asset will be reused for repairs/or building other asset(s).
The **Equipment Representative** will receive an email with instructions to login to workflow and complete “Data Removal Notification” process. If you already received Notification from LSP or do not need one – just click on “Complete” to finish the workflow. If you do not have it – contact LSP to obtain one.
Important Notification: In accordance with UM Policy 1816, prior to any equipment transfer, zero value or cannibalization, university data must be securely erased (wiped) from equipment. This "wipe" process should be conducted by a Local Technical Support Provider (LTP) and may be requested by entering a Help Desk Ticket or by calling 901-872-8850.

Surplus Property Personnel will not accept computer equipment unless accompanied by the UM Data Removal Verification form.

Equipment Information:
- Decal #: 0133553700
- Description: Optiplex 7440 AIO
- Make: Dell
- Model: Optiplex 7440 AIO
- Serial Number: CPUG16
- Original Organization: 340303 - Technology Access Fee
- Original Location: 113391 - Collierville Center 100

You can simply mark this notification activity as 'Complete' if the above policy does not apply to this equipment. If the policy above does apply, please make sure that you have the Data Removal Verification form completed before you mark this activity as 'Complete'.

If necessary, you may stop this workflow by selecting 'No' from the drop-down box below.

Stop Workflow: [No | Complete | Save & Close | Cancel]
The **Financial Manager** will receive an email with instructions to login to workflow to approve or decline the transaction.

From: dparks@memphis.edu

Sent: Friday, July 13, 2012 1:17 PM

To: Libby Shelton

Subject: Equipment Transfer -011936600 - Approve Transfer

Elizabeth Shelton,

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

Transfer Type: Zero Value

Decal #: 011936600
Description: Dell Optiplex GX620
Make: Dell
Model: GX620
Serial Number: FZH1091

Current Organization: 511030 - Grants and Contracts Accounting
Current Location: 100252 - Administration 275

Transfer Reason: old

New Organization: 511030 - Grants and Contracts Accounting

Equipment Rep: David Parks
**Financial Manager** selects the job from the Workflow Worklist, then choose ‘Approved’ or ‘Declined’ from the Decision field and click “**Complete**”. If ‘Declined’ – must enter the reason.
If approved, the workflow will be sent to Accounting Office for final approval and update. The following notification email will be sent to the equipment rep.

From: donotreply@memphis.edu [mailto: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
Upon approval by the Accounting Department, the Banner Fixed Asset System will be updated. You can use Banner INB screen FFIMAST to view whether the “System Status Code” is updated to “D”.

![Screen capture of FFIMAST with System Status Code highlighted as “D”](image-url)
Transfer Declined

If a transaction is declined by anyone in the workflow queue, the Equipment Representative will receive an email with the reason and must then login to Workflow to either make the applicable correction or to Stop the workflow.
Log in the Workflow and choose “YES” to stop workflow and “Complete”.
SURPLUS

• For **active** inventory items (system status code – I, N, J, G) the department should complete Zero Value process via the Fixed Asset Workflow system (except vehicles).

• Only **Inactive** items (system status code – D or C) should be surplused.

• Use Banner INB screen FFIMAST to view whether the “System Status Code” is “D” or “C”; if yes, print the screenshot.

• University-owned computers and portable devices or media must have all confidential and official University data erased from the computer or portable device or media prior to its transfer out of University control, and/or destroyed, using current best practices.
SURPLUS (cont’d)

• Obtain “Data Removal Notification” from your LSP.

• Attach screenshots of FFIMAST with “System Status Code” “D” or “C” along with “Data Removal Notification” to the asset.

• Go to Physical Plant’s website and complete the work order. **A work order** should be completed for all equipment to be picked up by Physical Plant.

• Decals are to remain on the equipment.
Complete Physical Plant’s Work Order Request Form
Physical plant’s website (http://www.memphis.edu/pp/worq.php)
Fixed Asset Helpdesk:
wf-fixedasset-admins@memphis.edu

Accounting Office: 678-2271