



Welcome to Focus on Finance!

April 18, 2019

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Agenda

- **Future Year Travel Authorizations – LaTisha Williams**
- **Fixed Assets Workflow Overview – Darya Maksimova**
- **What's New? Who Knew? What's Due? – Monica Goldsby**

Future Year Travel Authorizations



**LaTisha L. Williams – Asst. General Manager
Accounting Department**



Purpose of Request for Future Year Travel Authorization

- To request authorization for travel in the next fiscal year.
 - Any travel dates that extend past June 30th are considered future year. (i.e. June 26th – July 3rd)
 - Travel begins early in July.



Is a Request for Future Year Travel Authorization required?

- **No**

- There will be no transactions related to the trip in this fiscal year.

- **Yes**

- Reservations related to the trip will be made in this fiscal year. (i.e. airline)
- Expenditures related to the trip will be paid in this fiscal year.
- International Travel and the 21-day requirement includes current fiscal year.



Future Year Travel Authorization Form

- **Fully Complete** the Request for Future Year Travel Authorization Form. (Signatures are not required by Accounting, however, departmental authorizations apply.)
 - International Travel – Include a detail listing of expenditures. (Memo or Estimated Travel Expenses Worksheet)
- Submit to Accounting for data entry.
- After Accounting has created the PO, an email will be sent to the contact person notifying that the PO has been created and approval is required. (Please be sure to review and approve PO.)
- After all approvals are complete, the traveler may begin making reservations and submit Check Requests.



General Travel - Frequently Asked Question

- Is Hawaii, Alaska, Puerto Rico, Canada, or Mexico considered international?
 - **Yes**, they are considered international and require detailed expenses and the 21-day rule applies.



Applicable Forms

Request for Future Year Travel Authorization

<http://bf.memphis.edu/forms/trav/trav01.htm>

Estimated Travel Expenses Worksheet

http://bf.memphis.edu/forms/trav/travel_worksheet.xls

Fixed Asset Workshop



Darya Maksimova, Accountant III



Fixed Asset Team

Kathy Archie, Manager Financial Reporting
Darya Maksimova, Accountant III

wf-fixedasset-admins@memphis.edu



Agenda

- Fixed Asset Account Codes
- Fixed Asset Additions
- Fixed Asset Changes (Fixed Asset Workflow)
 - Overview
 - Identify Ptag_Code
 - Identify “Active” Items
 - Workflow Types
 - Locate Location Code
 - Resolve Workflow Error
 - Workflow Incomplete Log
 - Workflow Examples / Problems
- Inventory Confirmations

Fixed Asset Account Codes

Not Tagged (Under \$1,500)		
Account Number	Account Title	Examples
74500	Supplies	<ul style="list-style-type: none"> • iPad/Printer/Computer/AppleCare • Chairs/Monitors/Wall Mounts • USB Drive/Cables/Mouse/Pens/Cases
Tagged Equipment - Single Item/All Components (Under \$1,500)		
Account Number	Account Title	Examples
74504	Controlled Equipment under \$1,500	<ul style="list-style-type: none"> • iPad/Computer/Scientific Equipment • Equipment tracking required by Grant

Tagged Equipment - Single Item/All Components (\$1,500 - \$4,999)		
Account Number	Account Title	Examples
74510	Sensitive Equipment (\$1,500 - \$4,999)	<ul style="list-style-type: none"> • Lab Equipment • Copiers
74511	Computers (\$1,500 - \$4,999)	<ul style="list-style-type: none"> • Computers

Tagged Capital Equipment - Single Item/All Components (Over \$5,000)

Account Number	Account Title	Examples
78110	Office Equipment	<ul style="list-style-type: none">• Office Equipment• Copiers
78111	Furniture and Fixtures	<ul style="list-style-type: none">• Custom Furniture/Trophy Case• Lockers
78120	Operational Equipment	<ul style="list-style-type: none">• Athletic Equipment• Air Compressor/Generator• Yard Equipment
78130	Instructional Equipment	<ul style="list-style-type: none">• Audio Visual Equipment• Lab Equipment
78190	Other Equipment	<ul style="list-style-type: none">• Forklift• Heavy Equipment
78195	Works of Art	<ul style="list-style-type: none">• Fine Art

The University requires all capital equipment and sensitive equipment (costing between \$1,500 and \$4,999) be tagged and maintained in the Fixed Asset System.



Additions

- A decal/inventory tag should be affixed to the equipment as soon as possible after the item is acquired and placed in operation.
- When Financial Reporting staff identifies new items, they will contact the department to obtain the pertinent information (serial number, model, location) in order to assign a decal to the item.
- Departments may complete the “[Tagging Log Form](#)” and submit Financial Reporting via email at wf-fixedasset-admins@memphis.edu; or Admin. Bldg 275 when an item is purchased to obtain an inventory tag.

Tagging Log Form

Decal #	
Purchase Order #	
Description	
Asset Type	
Make	
Model	
Serial # /Service Tag #	
Location	

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 Search. Code matches.

Search Location:

Search

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

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

Location Code Results

201 record(s) found.

Location	Location Title	Location Pred	Location Pred Title
112684	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



Changes to Equipment

- LOST, STOLEN, OR DESTROYED – Complete/submit the [Report of Lost or Stolen Property](#) form to Police Services and copy to Accounting Office / Financial Reporting to update the Fixed Asset System.
- REMOVAL FROM PREMISES - Complete/submit the [Request for Off-Campus Use of Equipment](#) form to Financial Reporting. Department updates the location via the Fixed Asset Workflow system.
- TRADE-INS - When a trade-in is desired, the department must notify Financial Reporting. Financial Reporting will facilitate the transaction with Procurement and Contract Services.



Changes to Equipment – Con't

- Changes to description, make, model and serial number are made by Financial Reporting.
- Changes in location, department/organization, zero value, cannibalize and surplus made through the Fixed Asset Workflow System.



Fixed Asset Workflow

- Equipment Transfer Workflow is an online process for equipment transfer transactions including location changes, transferring to another department, to surplus, and to declare an item zero value or cannibalization.
- Each organization has a Financial Manager and an Equipment Representative in workflow.
- The Financial Manager is assigned through Banner. There can only be ONE financial manager. The designee can not be a Financial Manager.
- The Financial Manager assigns the equipment representative. There can only be ONE equipment representative for each org.

Financial Manager assigns/reassigns the equipment rep at
<https://bf.memphis.edu/spectrum/users/>

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Finance Program Guide

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

EQUIPMENT REPS

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

Equipment Representative Maintenance [\(logout\)](#)

Please login below to view/edit the users on organizations for which you have authority.

User Name:
Example: jsmith

Password:

Financial Manager (or designee) will add the UUID in the appropriate blank and select “add”. The Financial Manager may designate him/herself as the equipment representative.

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Finance
Program Guide

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

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assign equipment reps
view equipment reps
fixed asset workflow help

CODES
account code list
rule code list
location code search
program code list
date standards manual

TRAINING
learning curve

UTILITIES & REPORTS
budget overexpenditures
e-Print

Equipment Representative Maintenance [\(logout\)](#)

Equipment transactions are processed through Fixed Asset Workflow. In order to use Fixed Asset Workflow, each organization must have an Equipment Representative assigned.

Below is the current Equipment Representative assignment for each of your Organization (s). To change the Equipment Rep, you must first **Remove** the existing Equipment Rep then **Add** the new one. If you do not know the UUID of the user you wish to add, you may look it up in the [Whitepages](#).

Note that changes may take up to ten business days to appear in Workflow/Banner. Changes pending approval will be noted in the "Pending changes" section. Once approved, they will appear in the table below.

Current Equipment Representatives

Org Code	Org Name	UUID (Lookup)	Name	Action
513000	Payroll Office	MISOM	Montoya Williams	Remove
511030	Grants and Contracts Accounting	MISOM	Montoya Williams	Remove
511000	Accounting Office			Add
510000	AVP Finance	ABCOLE	Amelia Cole	Remove

Pending Changes

- Remove MISOM from org 511000. (Requestor: EWSHELTN)

I understand that the ultimate responsibility for any action taken by the above individual (s) is mine. Contact bfssecurity@memphis.edu for additional information.

[Logout](#)

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

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Print Version 

FOAPALS

- search by index
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- search by multiple fields
- search by orgn title
- search by index title

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- signatures by name
- approval queues by org
- approval queues by name

EQUIPMENT REPS

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

Equipment Reps List by Organization

Expand All

Collapse All

Export to Excel

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

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

Search

Fixed Asset Workflow instructions can be viewed at
<http://bf.memphis.edu/spectrum/fahelp.php>

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Finance Program Guide

FOAPALs

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assign equipment reps
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fixed asset workflow help

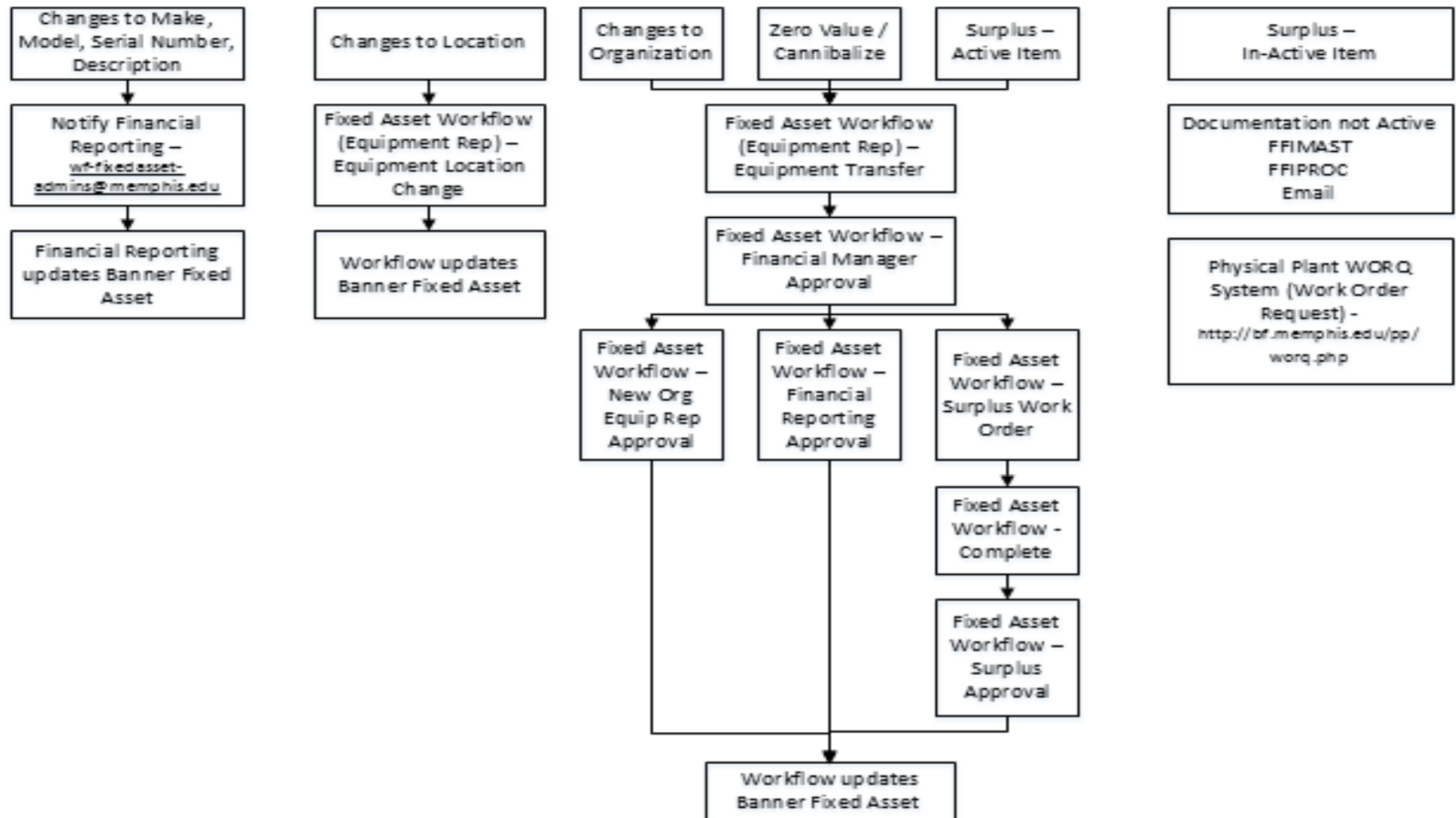
Fixed Asset Workflow Help

Print Version 

PDF Documents:

- [Designation of Equipment Representatives](#)
- [Changing Equipment Reps](#)
- [Location Change](#)
- [Transfer to Another Org](#)
- [Surplus](#)
- [Zero Value / Cannibalization](#)
- [Errors](#)

Making Changes in Banner Fixed Asset System

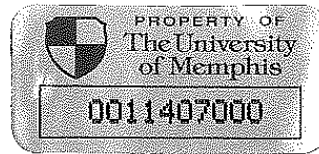


Fixed Asset PTAG_Code

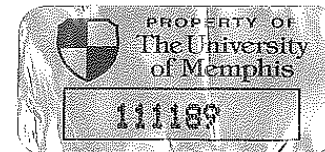
- PTAG_Code is an UOM Asset tag (also refers to a Permanent TAG, P-tag, Decal). This is a silver tag with UOM logo.
- A valid 9-digit decal number is needed. Three different kinds of decals have been used.



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

Fixed Asset Master Query FFIMAST 9.3.6 (PROD)

Asset Tag: 012599200

Start Over

MASTER INFORMATION

Origination Tag	T00118678	Permanent Tag Date	12/03/2012
Permanent Tag	012599200	Last Adjustment Date	
Primary Tag		Origination Tag	
Subordinate Type		Cancel Date	
Origination Tag Date	06/04/2012	System Status Code	I Invoiced
Asset Description	Dell OptiPlex 990 Minitor	Asset Type	SN Sensitive under \$1,500
Commodity		User Status Code	
Unit of Measure	EA Each		
Insurance Value		Replacement Value	
Market Value		Book Value	
<input type="checkbox"/> Capitalization Indicator		<input type="checkbox"/> Tag In Use	
<input type="checkbox"/> Asset Text Exists		<input type="checkbox"/> Gift Indicator	
Cost	1,212.06	Net Book Value	0.00
Total Cost	1,212.06	Total Net Book Value	0.00

Fixed Asset Master Query FFIMAST 9.3.6 (PROD)

Asset Tag: 011327300

Start Over

MASTER INFORMATION

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 asset status

Fixed Asset Master Query FFIMAST 9.3.6 (PROD)

Asset Tag: 011327300

Start Over

Insert Delete Copy Filter

ACQUISITION INFORMATION

Origination Tag	011327300	Permanent Tag	011327300	Apple Computer Emac
Acquisition Method	PY	Converted from Legacy System	Acquisition Date	09/30/2003
Make	Apple Computer	Serial Number or VIN	YM3296V7NM2	
Model		Part Number or Vehicle Tag		
Manufacturer				
User Reference Number		Percentage Used		
Barcode Number		Work In Progress		
In Service Date		Condition	GD	Good
Last Inventory Date		Title To	UM	University of Memphis
Disposal Method	DI	Disposed	Disposal Date	07/17/2009

Record 1 of 1

1 of 1 Per Page

Fixed Asset Master Query FFIMAST 9.3.6 (PROD)

Asset Tag: 011327300

Start Over

Insert Delete Copy Filter

PROCUREMENT INFORMATION

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 Tag Date		
Document		Source Submission		
Type				
Sequence				
Transfer Data		Grant		
Date	07/23/2009	Custodian ID		
COA	University of Memphis	Equipment Manager		
Organization	235000 Health Studies			
Location	101774 Fieldhouse 361			

Complete Physical Plant's Work Order Request Form.

If the item is not an active inventory item (*System Status Code "D"*) you can go straight to physical plant's website (<http://www.memphis.edu/pp/worq.php>) and complete the form. Please include a copy of the FFIMAST screen shot and Data Removal Verification Form.

The screenshot displays the Physical Plant website interface. At the top, a dark blue header contains the text "Physical Plant". Below this, a navigation bar lists several options: "Staff Directory", "Units", "WORQ System", "Recycling", and "Rental Property". The "WORQ System" option is highlighted. On the left side, there is a sidebar with four main categories: "WORQ System" (with a sub-description "Enter and check the status of campus work orders"), "Environmental Health & Safety" (with a sub-description "The Web site of Environmental Health & Safety"), "Forms" (with a sub-description "All of B&F's forms in one place"), and "Business & Finance" (with a sub-description "The Division of Business & Finance at the UofM"). The main content area shows a breadcrumb trail: "Home > Physical Plant > WORQ System". Below this, the title "WORQ System" is prominently displayed. Underneath the title, the heading "Work Order Request Query System" is followed by four links: "Enter a new work request" (which is pointed to by a red arrow), "Search for the status of an existing work request by Reference Number", "Search for the status of an existing work request by Building Name", and "Labor Rates".

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

1. Log into the My Memphis Portal at <http://my.memphis.edu>
2. 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](#)

3. Scroll down to 'My Processes' and select the three dots
4. Select one of the two types of Equipment Workflow based on your need.

The screenshot displays the 'My Processes' interface. On the left, a sidebar contains three main sections: 'Home' (with links to Worklist, Workflow Status Search, and Workflow Alerts), 'User Profile' (with links to My Processes, User Information, and Change Password), and 'Administration' (with links to User Management, Banner Workflow Modeler, and Workflow System Administration). The 'My Processes' link under 'User Profile' is highlighted with a red arrow. The main content area has a header 'My Processes' with a dropdown arrow. Below it, a grey bar indicates 'No Processes found.' and a three-dot menu icon is highlighted with a red arrow. The 'My Processes' section is titled 'My Processes' and lists two 'UOM' processes: 'UOM Equipment Location Change' and 'UOM Equipment Transfer'.



Two types of Workflow

- **Equipment Location Change Workflow:**
 - Change location within an organization
- **Equipment Transfer Workflow:**
 - Transfer between organizations
 - Surplus
 - Zero value
 - Cannibalization

The initial screens for the two Workflows are the same except the names of Workflow. Enter decal number in 'PTAG_CODE' field then click on 'Start Workflow'.

Start Workflow

Logoff Help

Organization: UOM
Workflow Name: UOM_FIN_EQUIP_LOCN_CHANGE:0
Workflow Specifics Name:
Priority: Normal ▾
Workflow Note:

Required Parameters

* PTAG_CODE:
Description: Equipment Decal Number

Start Workflow Reset Cancel

Attachments

Start Workflow

Logoff Help

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

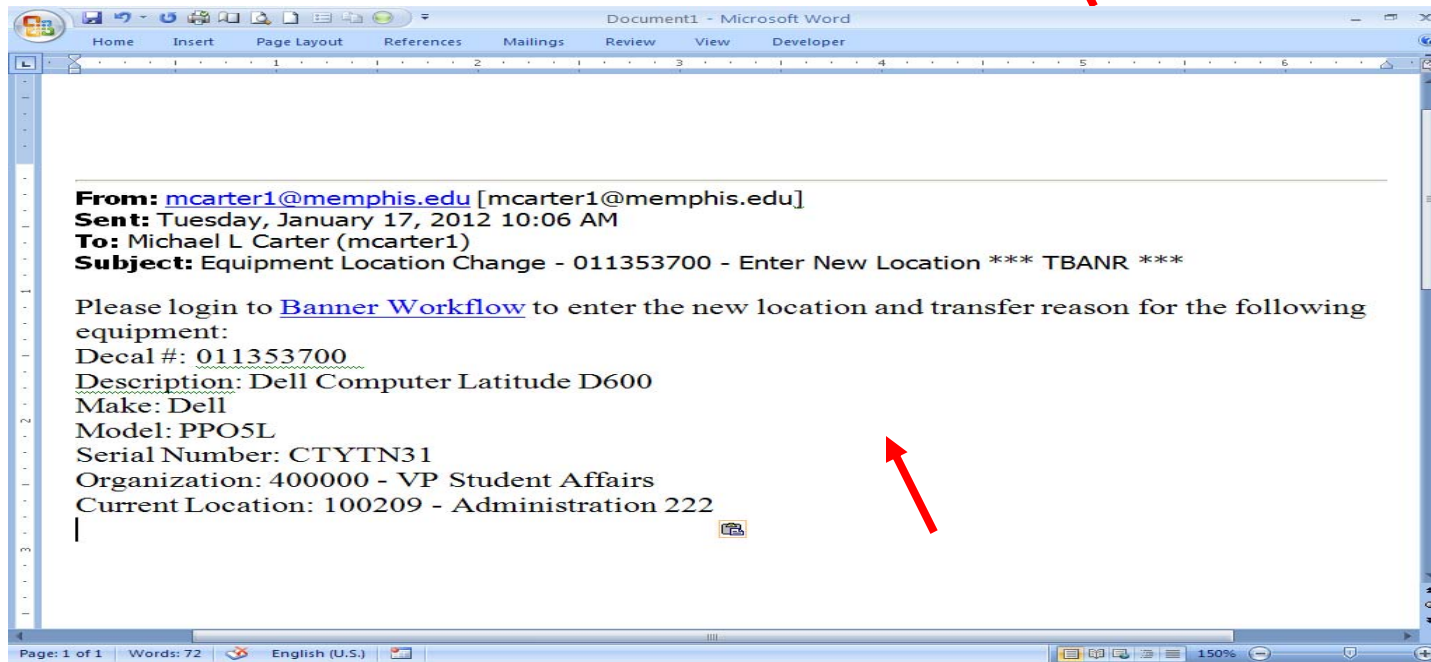
Attach File

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

Workflow

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	Enter Correct PTAG	Normal	27-Mar-2017 02:54:39 PM
	Ready			

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

Location Change Workflow

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.

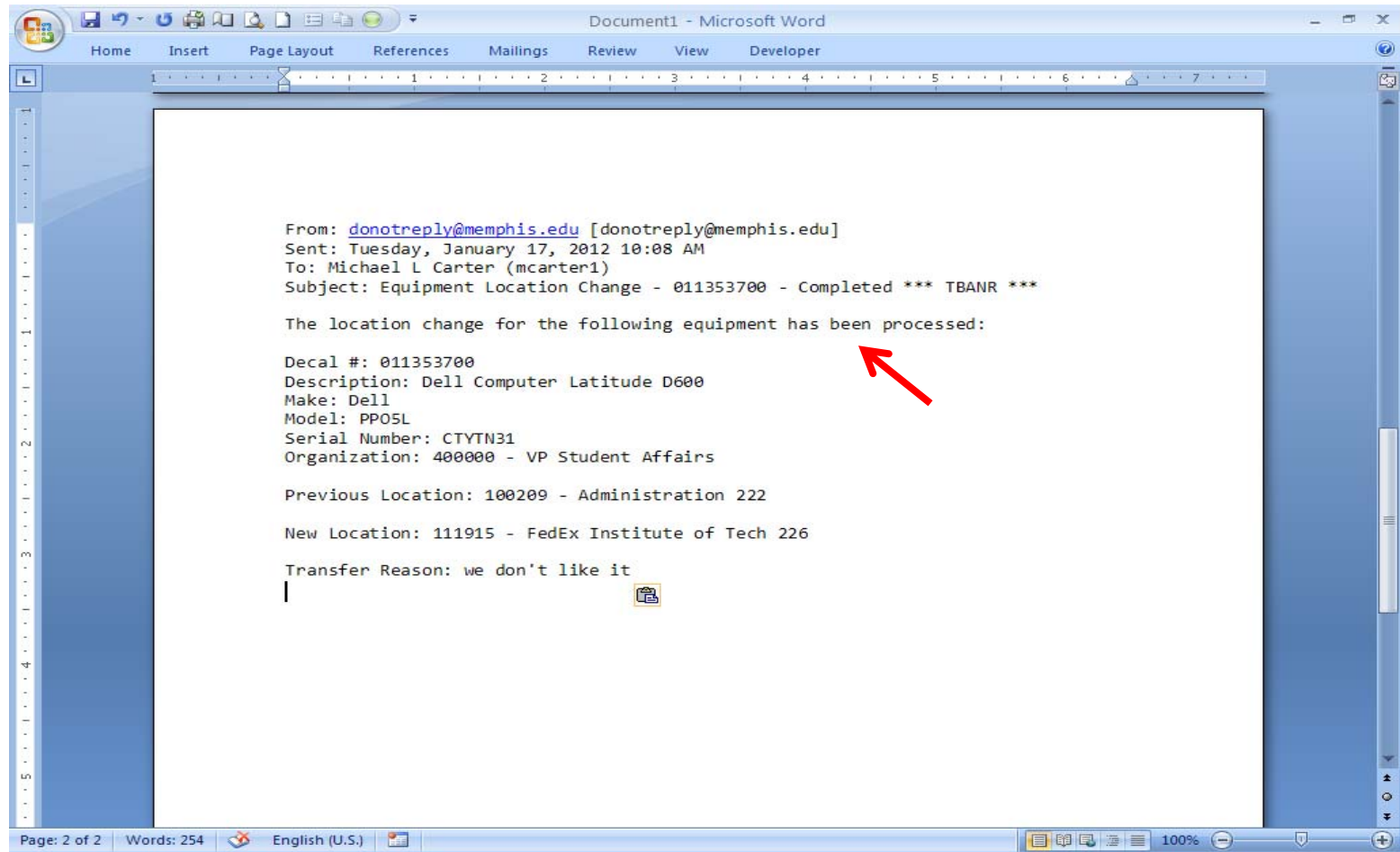
* Location Change Reason (Max 150 Char):

* 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.

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



Transfer between Organizations

Verify the asset info, select the “Transfer Between Departments” transaction type, enter transfer reason and enter new organization code. Click on ‘Complete’.

*Required Field
*** TBANR ***

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

* Transaction Type: Transfer Between Departments ▼

* Transfer Reason: Case 1

* New Organization Code: 235115

Please enter 860000 for Surplus.
[Click here](#) to search for a valid organization code.

* Stop Workflow: No ▼

NOTE

If you are Stopping this workflow, you must enter spaces or valid values in the Transfer Reason and New Organization Code fields before doing so.

Cannibalization Note

If this equipment is being cannibalized, please remove and dispose of the UofM decal after you receive the email stating that this request has been approved by Accounting.

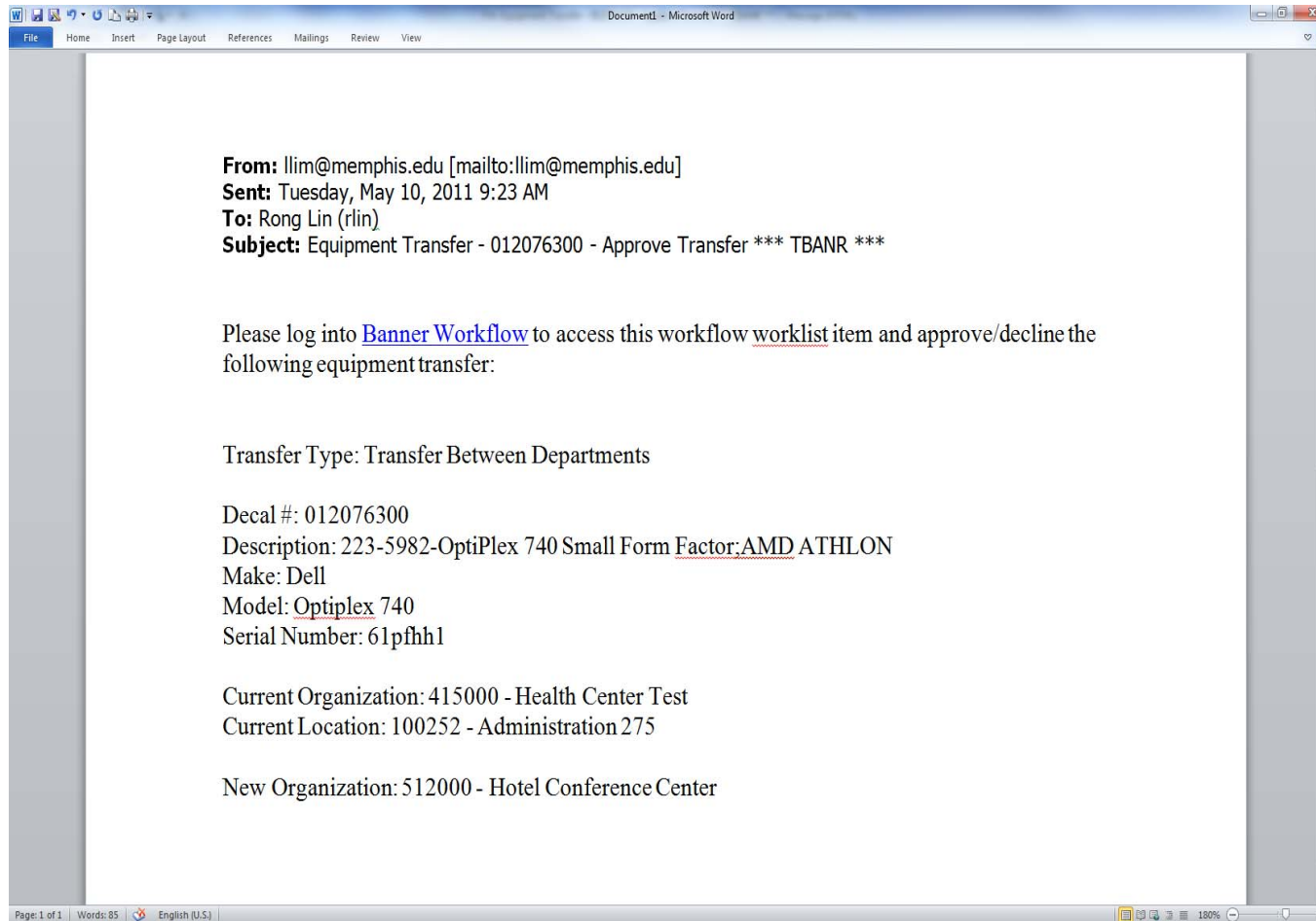
If necessary, you can then create a work order for Surplus to pick up the remaining equipment shell without going through this process since the equipment will no longer be tagged.

Complete

Save & Close

Cancel

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”.

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

Organization	Workflow
UOM	Equipment Location Change - 012300200 Ready

1 - 1 of 1 | First | Pre

*Required Field
*** TEAMR ***

Please Approve or Decline this equipment transfer request:

Decal #:: 011748700
Description: DELL OPTIPLEX GX620 COMPUTER
Make: DELL
Model: GX620
Serial Number: 0979R91
Current Organization: 232103 - CEPR D Lustig Test
Current Location: 103492 - Patterson Hall 111A
New Organization: 235115 - HSS Barbara McClanahan Test
Equipment Rep: Rong Lin
Transaction Type: Transfer Between Departments
Transfer Reason: test

* Decision:

Reason Declined:

Approved

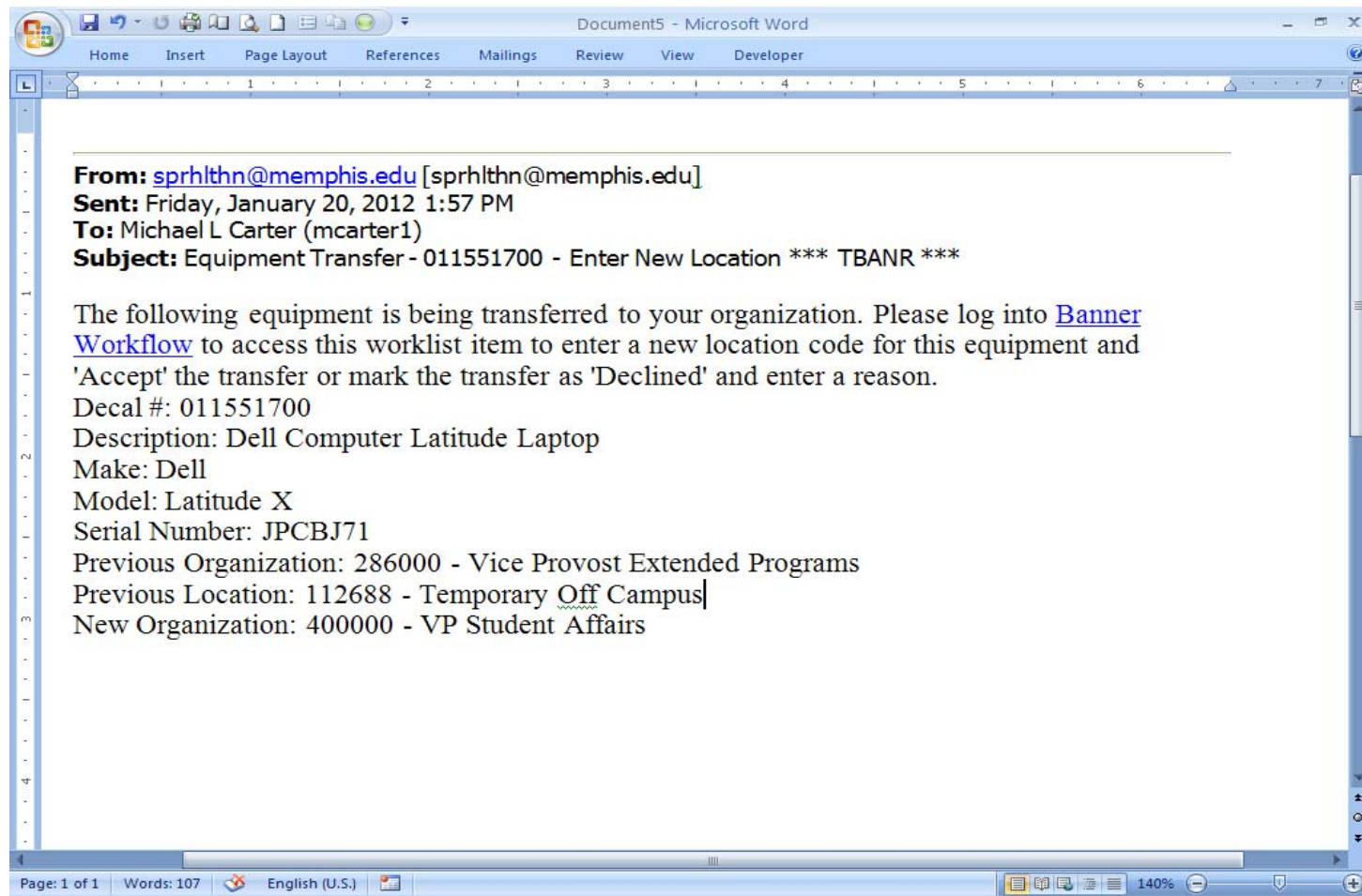
Approved

Declined

****NOTE****
You must enter a reason in Reason Declined if you are declining this equipment transfer!

Complete Save & Close Cancel

After the **Relinquishing Financial Manager's** approval, an email will be sent to the **Receiving Equipment Representative** notifying of the transfer.



Receiving Equipment Representative needs to verify the information, enter the new location code, accept/decline the transfer and click 'Complete' to finish the workflow.

File Edit View History Bookmarks Tools Help

Banner Workflow 8.3.0.0 (w... x

workflowtest1.memphis.edu/7777/wftbans/home/newLaunch.do?workItemPK=282140

UOM Login Finance Program Guide University of Memphis... UMI772 - Equipment L... Policies and Guideline... umhelpdesk U of M Business & Fin... GASB LexisNexis® Custom S... TN Summit workflowum

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

Enter New Location Code

Hide Menu Logoff Help

*Required Field
*** TBANR ***

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 #:	012725700
Description:	Apple Mac Pro
Make:	Apple
Model:	Mac Pro
Serial Number:	C073V0AXfs4MH
Transaction Type:	Transfer Between Departments
Transfer Reason:	giving to dept
Previous Organization:	216000 - CER1
Previous Location:	110654 - CER1 3876 Central 106
New Organization:	217400 - Navy ROTC

* New Location Code (Must be 6 digits): 106591

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

* Accept / Decline: Accept

Reason Declined:

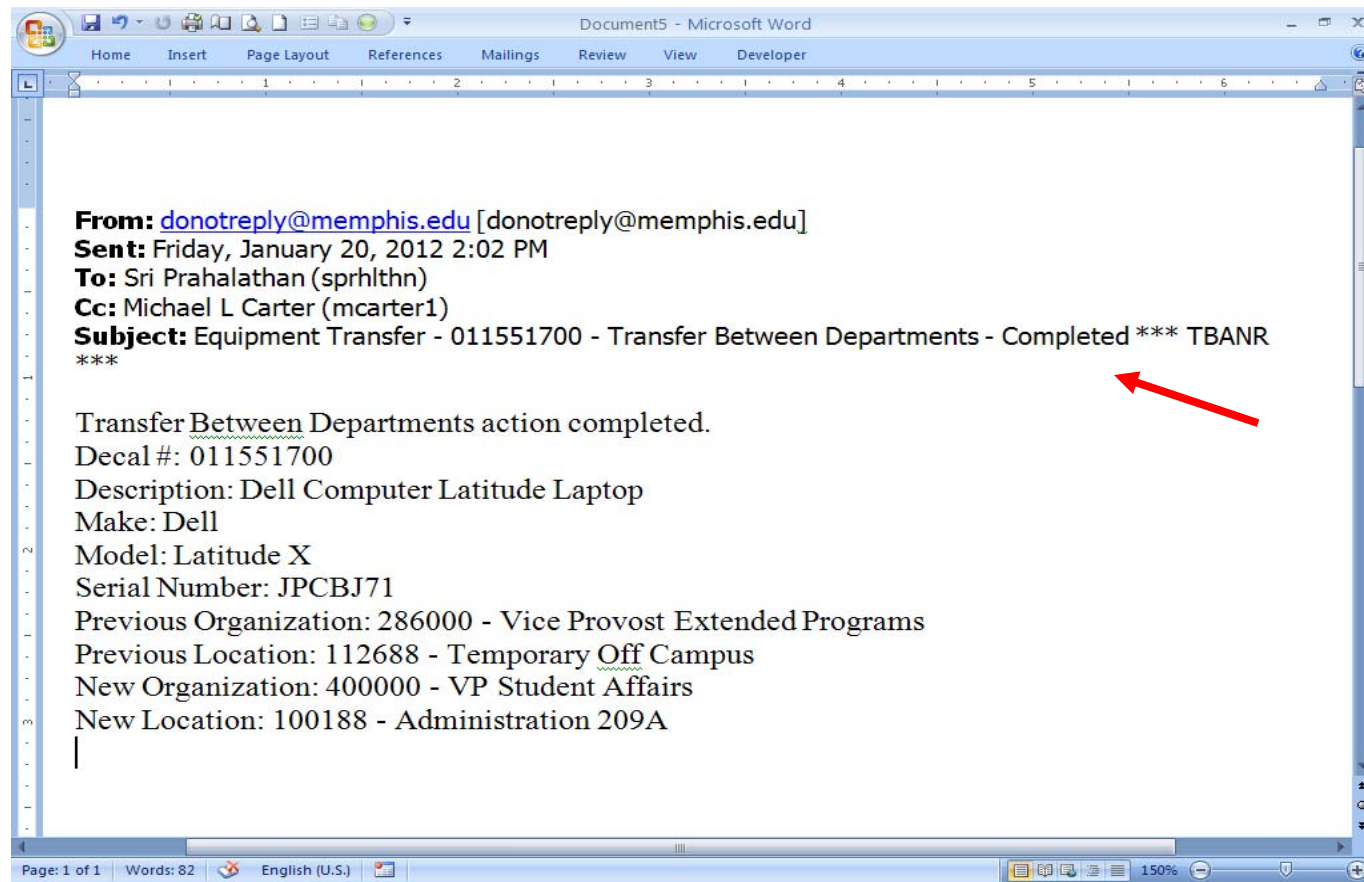
NOTE
If you are Declining this equipment transfer, you must enter a reason in the the Reason Declined field and enter either the Previous Location value or spaces into the New Location Code field.

Complete Save & Close Cancel

Top

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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.**



SURPLUS

- **A work order** is completed for all equipment to be picked up by Physical Plant.
- For **active** inventory items (system status code – **I, N, J, G**) the department should request the transfer and work order via the Fixed Asset Workflow system or ZV and work order.
- **Inactive** items (system status code – **D or C**), go to Physical Plant's website and complete the work order. Include support FFIMAST 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.
- Decals are to remain on the equipment.

Transfer to Surplus

Verify the asset info, select the “Surplus” transaction type, **enter 860000 for organization code** and enter the transfer reason. Click on ‘Complete’.

*** TBANR ***

Decal #:	000094720
Description:	Sony Recorder
Make:	Sony
Model:	PVW2800
Serial Number:	
Current Organization:	286000 - Vice Provost Extended Programs
Current Location:	105723 - Meeman Journalism Building 329B
* Transaction Type:	Transfer to Surplus
* New Organization Code:	860000
Please enter 860000 for Surplus. Click here to search for a valid organization code.	
* Transfer Reason:	Case 4 - Transfer
If you would like to stop this workflow instance, select 'Yes' below.	
* Stop Workflow:	No
<input type="button" value="Complete"/> <input type="button" value="Save & Close"/> <input type="button" value="Cancel"/>	

Relinquishing Financial Manager selects the job from the Workflow Worklist to approve/decline the transfer, then accept/decline the transfer and click 'Complete'.

*Required Field
*** TBANR ***

Please Approve or Decline this equipment transfer request:

Decal #:: 011748700
Description: DELL OPTIPLEX GX620 COMPUTER
Make: DELL
Model: GX620
Serial Number: G979R91
Current Organization: 232103 - CEPR D Lustig Test
Current Location: 103492 - Patterson Hall 111A
New Organization: 235115 - HSS Barbara McClanahan Test
Equipment Rep: Rong Lin
Transaction Type: Transfer Between Departments
Transfer Reason: test

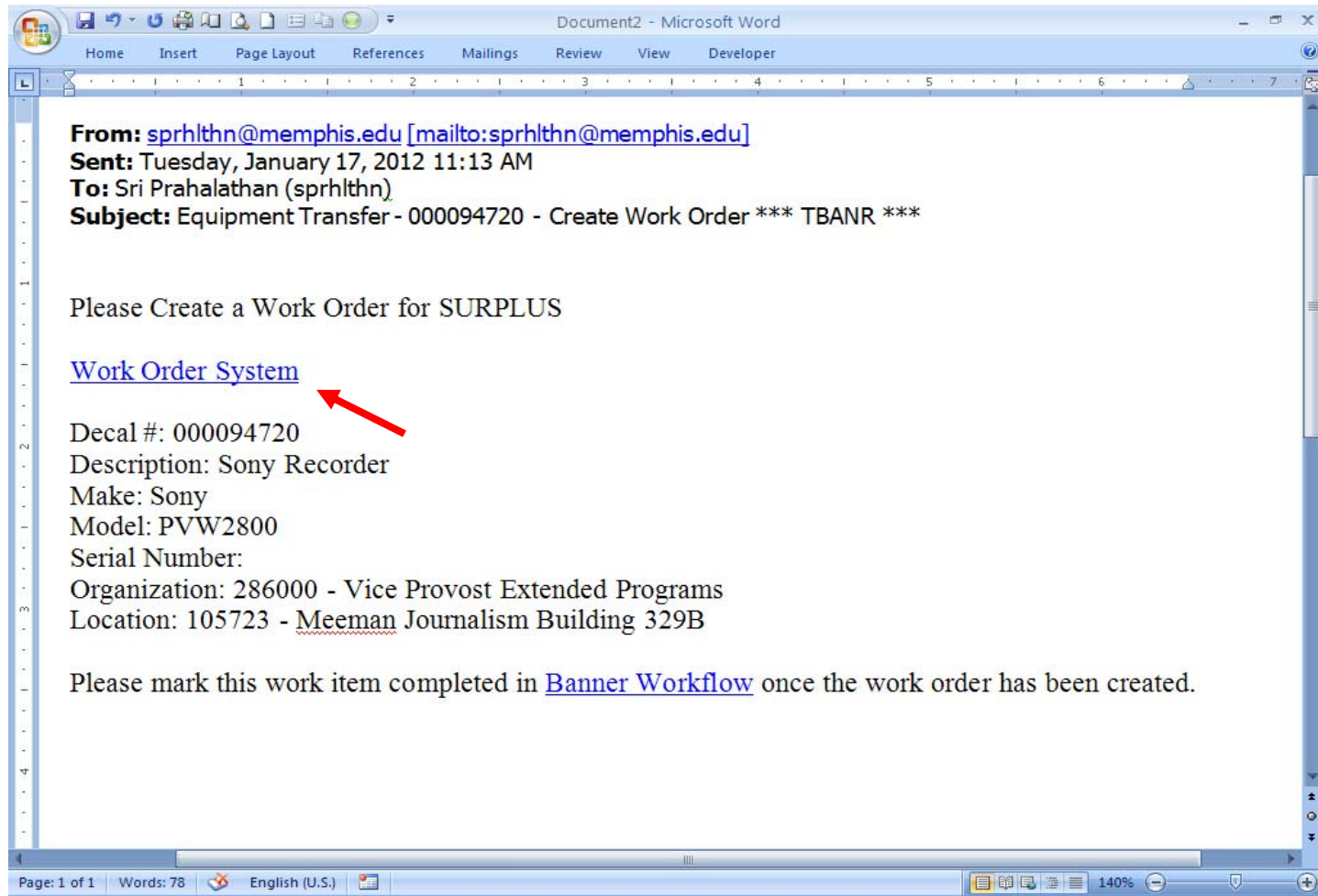
* Decision:

Reason Declined:

****NOTE****

You must enter a reason in Reason Declined if you are declining this equipment transfer!

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.



Or you may select the job from the Worklist, and click on the link to create the work order.

The left screenshot shows the 'myTest' web application interface. The 'Workflow Worklist' section contains a table with the following data:

Organization	Workflow Name	Activity	Created
UOM	Equipment Transfer - 000094720 Ready	Create Work Order	17-Jan-2012 11:13:18 AM

A red arrow points to the 'Equipment Transfer - 000094720' entry. Below the table are links for 'Refresh', 'Show Entire Worklist', and 'Open W'.

The right screenshot shows the 'Manual Activity' page. It contains the following text:

*** TBANR ***

Please Create a work order for SURPLUS by [clicking here](#)

Equipment Information:

Decal #: 000094720
Description: Sony Recorder
Make: Sony
Model: PVW2800
Serial Number:

Current Organization: 286000 - Vice Provost Extended Programs
Current Location: 105723 - Meeman Journalism Building 329B

New Organization: 860000 - General Plant
New Location: 112218 - Building 45 Central Receiving 273

Buttons: **Complete** **Cancel**

A red arrow points to the 'clicking here' link.

Complete Physical Plant's Work Order Request Form.

WORQ System
Enter and check the status of campus work orders

Environmental Health & Safety
The Web site of Environmental Health & Safety

Forms
All of B&F's forms in one place

Business & Finance
The Division of Business & Finance at the UofM

Physical Plant

Staff DirectoryUnitsWORQ SystemRecyclingRental Property

Home > Physical Plant > WORQ System

WORQ System

Work Order Request Query System

Enter a new work request

Search for the status of an existing work request by Reference Number

Search for the status of an existing work request by Building Name

Labor Rates

Important note: remember to go back to Workflow to Complete the task once the work order is submitted.

The image displays two screenshots of the myTest web application interface, illustrating the workflow process.

Left Screenshot (Workflow Worklist):

- The browser window is titled "myTest - Mozilla Firefox".
- The URL bar shows "mytest.memphis.edu/tag.70af0913f051e509.re".
- The page header includes "myMEMPHIS" and a welcome message: "Welcome Sri Prahalathan. You are currently logged in."
- The navigation bar includes links: Home, eCampus Resources, Advising, Ethnicity Survey, and En.
- The main section is titled "Workflow Worklist".
- A table lists workflow items:

Organization	Workflow Name	Activity	Created
UOM	Equipment Transfer - 000094720 Ready	Create Work Order	17-Jan-2012 11:13

Below the table are links: Refresh, Show Entire Worklist, and C.

Right Screenshot (Manual Activity):

- The browser window is titled "myTest - Mozilla Firefox".
- The URL bar shows "mytest.memphis.edu/tag.70af0913f051e509.re".
- The page header includes "myMemphis" and links: Back to Workflow Tab, E-mail, Datebook, and C.
- The main section is titled "Manual Activity" with a "Workflow Help" link.
- The content area displays the following information:

*** TBANR ***

Please Create a work order for SURPLUS by [clicking here](#)

Equipment Information:

Decal #: 000094720
Description: Sony Recorder
Make: Sony
Model: PVW2800
Serial Number:

Current Organization: 286000 - Vice Provost Extended Programs
Current Location: 105723 - Meeman Journalism Building 329B

New Organization: 860000 - General Plant
New Location: 112218 - Building 45 Central Receiving 273

At the bottom, there are two buttons: **Complete** and **Cancel**. A red arrow points to the "Complete" button.

powered by **SUNGARD** SCT HIGHER EDUCATION

Once you have completed the surplus transaction, 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.


Document2 - Microsoft Word

Home Insert Page Layout References Mailings Review View Developer

From: donotreply@memphis.edu [donotreply@memphis.edu]
Sent: Tuesday, January 17, 2012 11:22 AM
To: Sri Prahalathan (sprhlthn)
Cc: Ryan Gail Seidner (rgsidner)
Subject: Equipment Surplus Transaction Form (Decal #: 000094720) *** TBANR ***

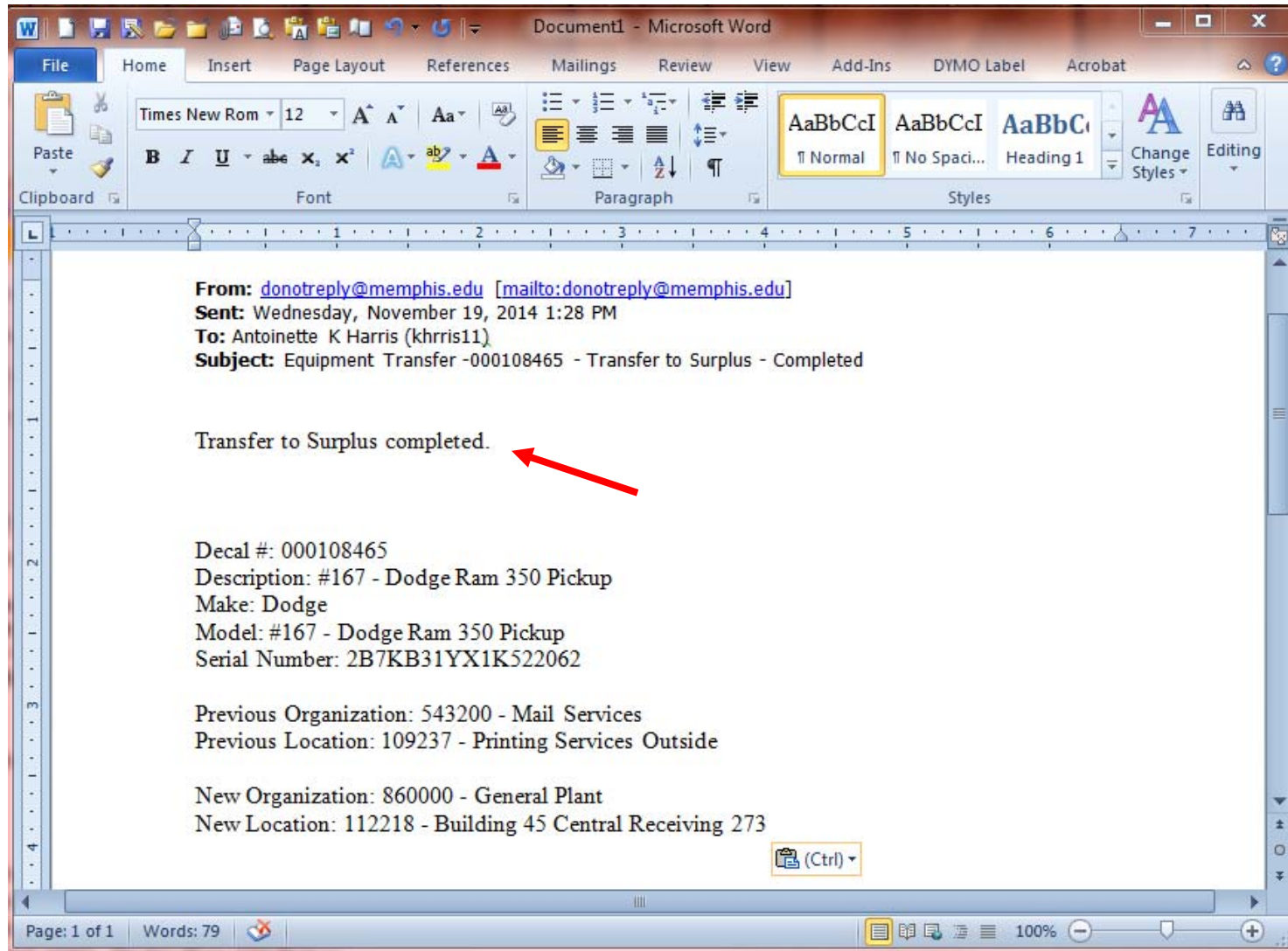
Equipment Surplus Transaction Form

Please print this form and have it ready when the equipment is picked up.

Decal #	Location	Description	Operable
000094720	105723 - <u>Meeman</u> Journalism Building 329B	Description: Sony Recorder Make: Sony Model: PVW2800 Serial Number:	Yes ____ No ____
Transferred from		Transferred to	
Khandakar Islam 17-Jan-2012 11:13:15 AM Authorized Signature Date Custody & responsibility of the above item is hereby relinquished.		 Picked up by _____ Date _____ Custody & responsibility of the above item is hereby accepted.	

Page: 1 of 1 Words: 110 English (U.S.) 140%

After physical plant approves, the workflow will update Banner and a final notification email will be sent to the **Equipment Representative**.



Zero Value or Cannibalization

Verify the asset info, select the transaction type, **enter the org code (current code)**, enter the transfer reason, and click 'Complete'.

myTest - Windows Internet Explorer

http://mytest.memphi

myMemphis

Back to Workflow Tab

*** TBANR ***

Decal #: 011324800
Description: Pomeroy Computer
Make: Pomeroy
Model: 7000
Serial Number: D323LNY1H002
Current Organization: 286000 - Vice Provost Extended Programs
Current Location: 100023 - Administration 106

* Transaction Type: Zero Value
* New Organization Code: Transfer Between Departments
Transfer to Surplus
Cannibalization
Zero Value
Please enter 860000 for
[Click here](#) to search for
* Transfer Reason: Transfers Case 2
If you would like to stop this workflow instance, select 'Yes' below.
* Stop Workflow: No

Complete Save & Close Cancel

Relinquishing Financial Manager selects the job from the Workflow Worklist to approve/decline the transfer, then accept/decline the transfer and click 'Complete'.

myTest - Windows Internet Explorer

http://mytest.memphis.edu/itag.2527e54b63158690.render.userLayoutCode.target.c534071n201.uP_tparam=ut8uuf=1%2fcp%2fcp%2flogin%3fsys%3Dbannerw%26uof%3Dhttp%253A%252F%252Fworkflowtest1.me

myMemphis

Back to Workflow Tab

E-mail Datebook Groups Admin Logout Help

*Required Field
*** TBANR ***

Please Approve or Decline this equipment transfer request:

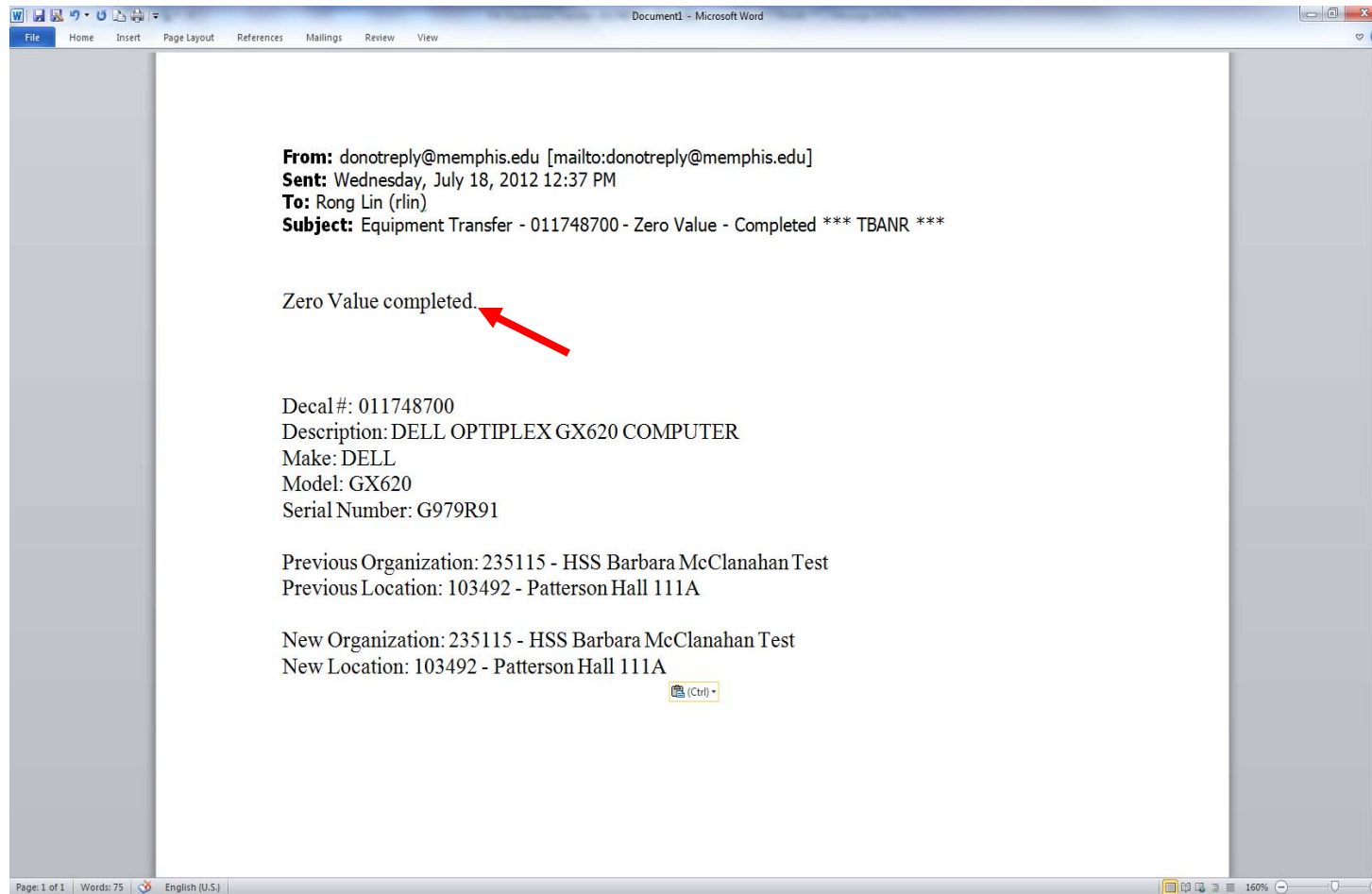
Decal #:: 011748700
Description: DELL OPTIPLEX GX620 COMPUTER
Make: DELL
Model: GX620
Serial Number: G979R91
Current Organization: 232103 - CEPR D Lustig Test
Current Location: 103492 - Patterson Hall 111A
New Organization: 235115 - HSS Barbara McClanahan Test
Equipment Rep: Rong Lin
Transaction Type: Transfer Between Departments
Transfer Reason: test

* Decision: Approved
Reason Declined: Approved
Declined

NOTE
You must enter a reason in Reason Declined if you are declining this equipment transfer!

Complete Save & Close Cancel

If approved, the workflow will be sent to Accounting for approval and update. Once approved by Accounting, the following final notification email will be sent to the **Equipment Representative**.



Location Codes

myTest - Windows Internet Explorer

http://mytest.memphis.edu/tag.2527e54bb3158690.render.userLayoutRootNode.target.u5240711.n201.uP?uP_tparam=utf&utf=%2Fcp%2Fip%2Flogin%3Fsys%3Dbannerwf%26url%3Dhttp%253A%252F%252Fworkflowtest1.me

File Edit View Favorites Tools Help

myTest

myMemphis

Back to Workflow Tab

E-mail Datebook Groups Admin Logout Help

*Required Field
*** TBANR ***

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 #:	011748700
Description:	DELL OPTIPLEX GX620 COMPUTER
Make:	DELL
Model:	GX620
Serial Number:	G979R91
Transaction Type:	Transfer Between Departments
Transfer Reason:	test
Previous Organization:	232103 - CEPR D Lustig Test
Previous Location:	103492 - Patterson Hall 111A
New Orgnization:	235115 - HSS Barbara McClanahan 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.

Done

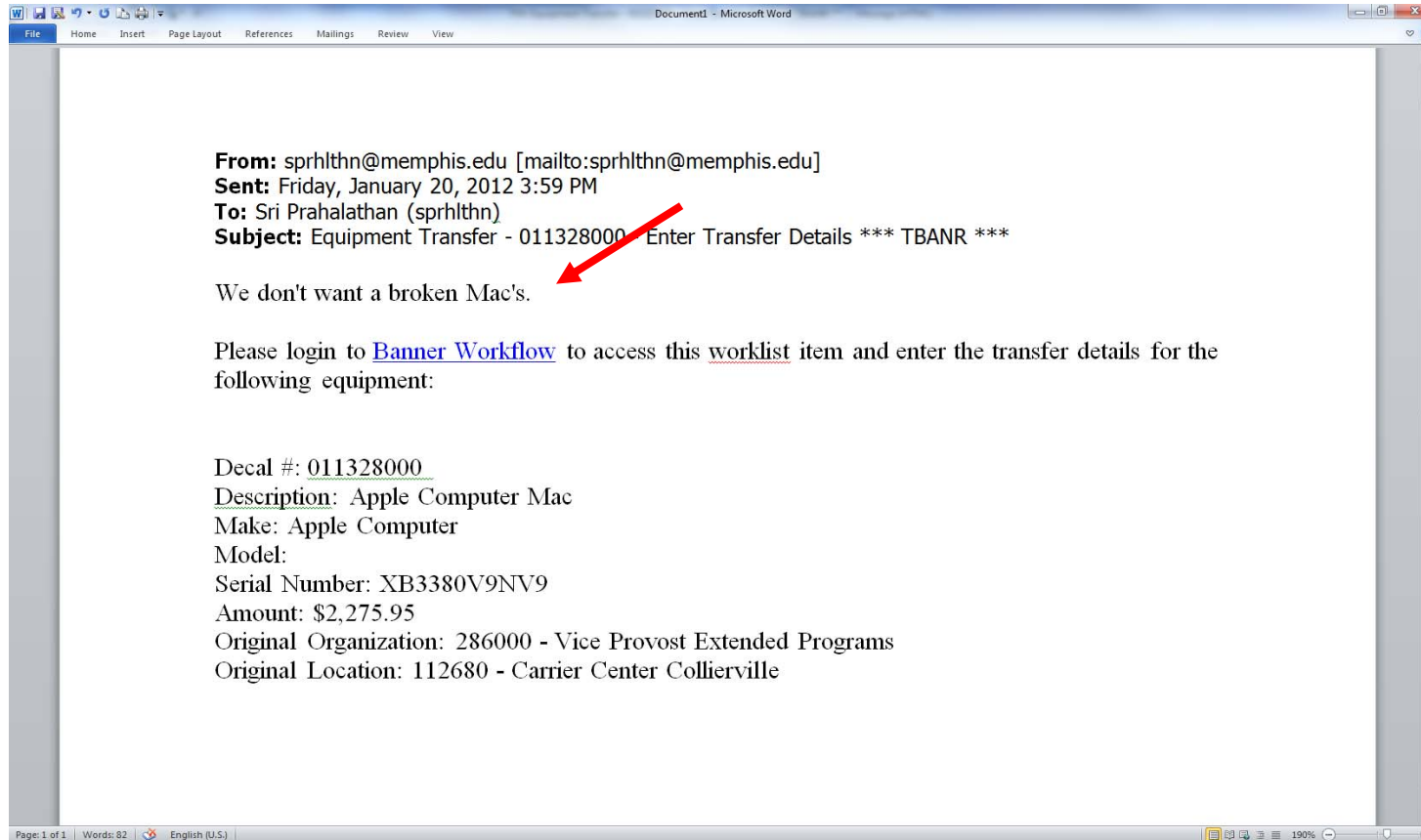
Trusted sites | Protected Mode: Off

125%

Transfer Declined

What if a transaction is declined by your financial manager, receiving equipment representative, Surplus, or Accounting?

You will receive the following email with the reason. You must log in to Workflow to make the correction or to Stop the workflow.



FileEditViewHistoryBookmarksToolsHelp

Banner Workflow 8.3.0.0 (w... x

workflowtest1.memphis.edu/7777/wftbani/home/newLaunch.do?workItemPK=282170

Search

UOM LoginFinance Program GuideUniversity of Memphis...UM1772 - Equipment I...Policies and Guideline...umhelpdeskU of M Business & Fin...GASBLExisNexis® Custom S...TN Summitworkforum

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

Enter New Location Code

Hide MenuLogoffHelp

*Required Field

*** TBANR ***

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 #:

011313000

Description:

Digital Seismometer

Make:

Guarlap

Model:

CMG-6TD

Serial Number:

T6193

Transaction Type:

Transfer Between Departments

Transfer Reason:

giving to dept

Previous Organization:

216000 - CERI

Previous Location:

110672 - CERI 3876 Central Garage 100

New Organization:

217400 - Navy ROTC

* New Location Code (Must be 6 digits):

110672

Click here

 to search for a valid location code.

* Accept / Decline:

Declined

Reason Declined:

could not find

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.

Complete

Save & Close

Cancel

Top

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*Required Field
*** TBANR ***

This transfer was declined by the Relinquishing Financial Manager - Iellis3.
Reason Declined: Workflow Testing

Decal #: 011660800
Description: Sun Sb2500 Server
Make: Sun
Model: Sb2500
Serial Number: FE54450001
Current Organization: 216000 - CERI
Current Location: 110541 - CERI 3904 Central 215A

* Transaction Type:

* Transfer Reason:

* New Organization Code:

Please enter 860000 for Surplus.
[Click here](#) to search for a valid organization code.

* Stop Workflow:

****NOTE****

If you are Stopping this workflow, you must enter spaces or valid values in the Transfer Reason and New Organization Code fields before doing so.

****Cannibalization Note****

If this equipment is being cannibalized, please remove and dispose of the UofM decal after you receive the email stating that this request has been approved by Accounting.

If necessary, you can then create a work order for Surplus to pick up the remaining equipment shell without going through this process since the equipment will no longer be tagged.

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

Enter Equipment Transfer Transaction Type

Hide Menu Logoff Help

*Required Field
*** TBANR ***

This transfer was declined by Accounting - Iellis3.
Reason Declined: Workflow Testing

Decal #: 011436500
Description: #199 - 2004 Ford F150
Make: Ford
Model: #199 - 2004 Ford F150
Serial Number: 1FTPX14594NC46219
Current Organization: 216000 - CERI
Current Location: 110559 - CERI 3904 Central Outside

* Transaction Type: Zero Value

* Transfer Reason: no longer needed

* New Organization Code: 216000

Please enter 860000 for Surplus.
[Click here](#) to search for a valid organization code.

* Stop Workflow: Yes

***NOTE**

If you are Stopping this workflow, you must enter spaces or valid values in the
Transfer Reason and New Organization Code fields before doing so.

Cannibalization Note

If this equipment is being cannibalized, please remove and dispose of the UofM decal
after you receive the email stating that this request has been approved by
Accounting.
If necessary, you can then create a work order for Surplus to pick up the remaining
equipment shell without going through this process since the equipment will no
longer be tagged.

Complete Save & Close Cancel

[Top](#)

Error Emails

Review the error and the suggested solution

The image displays three screenshots of Microsoft Word documents, each containing an email from rlin@memphis.edu and a corresponding solution. Red arrows indicate the flow from the error message to the solution.

Top Screenshot: The email subject is "Equipment Location Change - 012138000 - Problem with Decal # *** TBANR ***". The error message is: ***** ERROR: Invalid System Status Code:D *****.

Bottom Left Screenshot: The email subject is "Equipment Location Change - 011788800 - Problem with Decal # *** TBANR ***". The error message is: ***** ERROR: Equipment with Decal #011788800 belongs to Org: 210104 and you are not authorized to make changes. *****. The solution section includes: "If the error message is 'Decal #xxxxxx Not Found, please verify the decal number on FFIMAST in Banner INB.", "If the error message is 'Invalid System Status Code: xx', this equipment has been disposed or zero-valued in Banner. You cannot continue with this location change. Please stop this workflow.", "If the error message is 'Equipment with Decal #xxxxxx belongs to Org xxxxxx and you are not authorized to make changes', you can stop this workflow or contact the Financial Manager of the specified org to request access as the designated equipment representative to process location changes in workflow.", "If the error message is 'Another Fixed Asset Workflow is currently active for equipment with Decal #xxxxxx. You cannot continue this workflow until that one has completed.', you can stop this workflow or wait until the other workflow has completed and continue.", "Once you are ready to proceed, please log back into [Banner Workflow](#) to access this [worklist](#) item and re-enter a valid Decal # or stop the workflow.", "If you have any questions, please email the Fixed Asset Workflow administrators at wf-fixedasset-admins@memphis.edu."

Bottom Right Screenshot: The email subject is "Equipment Location Change - 012138400 - Problem with Decal # *** TBANR ***". The error message is: ***** ERROR: Another Fixed Asset Workflow is currently active for equipment with Decal #012138400. You cannot continue this workflow until that one has completed. *****. The solution section includes: "If the error message is 'Decal #xxxxxx Not Found, please verify the decal number on FFIMAST in Banner INB.", "If the error message is 'Invalid System Status Code: xx', this equipment has been disposed or zero-valued in Banner. You cannot continue with this location change. Please stop this workflow.", "If the error message is 'Equipment with Decal #xxxxxx belongs to Org xxxxxx and you are not authorized to make changes', you can stop this workflow or contact the Financial Manager of the specified org to request access as the designated equipment representative to process location changes in workflow.", "If the error message is 'Another Fixed Asset Workflow is currently active for equipment with Decal #xxxxxx. You cannot continue this workflow until that one has completed.', you can stop this workflow or wait until the other workflow has completed and continue.", "Once you are ready to proceed, please log back into [Banner Workflow](#) to access this [worklist](#) item and re-enter a valid Decal # or stop the workflow.", "If you have any questions, please email the Fixed Asset Workflow administrators at wf-fixedasset-admins@memphis.edu."

*Required Field
*** TBANR ***

*** ERROR MESSAGE: Invalid System Status Code

If the error message is 'Decal #xxxxxx Not Found', verify the decal number on FFIMAST in Banner INB.

If the error message is 'Invalid System Status Code', this equipment has been disposed or zero-valued in Banner. You cannot continue with this transfer. Please stop this workflow.

If the error message is 'Equipment with Decal #xxxx belongs to Org xxxxxx and you are not authorized to make changes', you can stop this workflow or contact the Financial Manager of the specified org to request access as the designated equipment representative to process equipment transfers in workflow.

Once you have resolved the above issue, please re-enter a valid Decal #, or select 'Yes' from the dropdown to stop this workflow.

If you have any questions, please email the Fixed Asset Workflow administrators at wf-fixedasset-admins@memphis.edu.

* Decal #:

* Stop Workflow: Yes ▾

*Required Field
*** TBANR ***

*** ERROR MESSAGE: Another Fixed Asset Workflow is currently active for equipment with Decal #012880200. You cannot continue this workflow until that one has completed. ***

If the error message is 'Decal #xxxxxx Not Found', please verify the decal number on FFIMAST in Banner INB.

If the error message is 'Invalid System Status Code: xx', this equipment has been disposed or zero-valued in Banner. You cannot continue with this transfer. Please stop this workflow.

If the error message is 'Equipment with Decal #xxxxxx belongs to Org xxxxxx and you are not authorized to make changes', you can stop this workflow or contact the Financial Manager of the specified org to request access as the designated equipment representative to process equipment transfers in workflow.

Once you have resolved the above issue, please re-enter a valid Decal #, or select 'Yes' from the dropdown to stop this workflow.

If you have any questions, please email the Fixed Asset Workflow administrators at wf-fixedasset-admins@memphis.edu.

* Decal #:

* Stop Workflow: Yes ▾

*Required Field
*** TBANR ***

*** ERROR MESSAGE: Equipment with Decal #012716700 belongs to Org: 215108 and you are not authorized to make changes. ***

If the error message is 'Decal #xxxxxx Not Found', verify the decal number on FFIMAST in Banner INB.

If the error message is 'Invalid System Status Code', this equipment has been disposed or zero-valued in Banner. You cannot continue with this transfer. Please stop this workflow.

If the error message is 'Equipment with Decal #xxxx belongs to Org xxxxxx and you are not authorized to make changes', you can stop this workflow or contact the Financial Manager of the specified org to request access as the designated equipment representative to process equipment transfers in workflow.

Once you have resolved the above issue, please re-enter a valid Decal #, or select 'Yes' from the dropdown to stop this workflow.

If you have any questions, please email the Fixed Asset Workflow administrators at wf-fixedasset-admins@memphis.edu.

* Decal #:

* Stop Workflow: Yes ▾

*Required Field
*** TBANR ***

*** ERROR MESSAGE: Decal #SW124DS Not Found ***

If the error message is 'Decal #xxxxxx Not Found', please verify the decal number on FFIMAST in Banner INB.

If the error message is 'Invalid System Status Code: xx', this equipment has been disposed or zero-valued in Banner. You cannot continue with this location change. Please stop this workflow.

If the error message is 'Equipment with Decal #xxxxxx belongs to Org xxxxxx and you are not authorized to make changes', you can stop this workflow or contact the Financial Manager of the specified org to request access as the designated equipment representative to process location changes in workflow.

If the error message is 'Another Fixed Asset Workflow is currently active for equipment with Decal #xxxxxx. You cannot continue this workflow until that one has completed.', you can stop this workflow or wait until the other workflow has completed and continue.

Once you have resolved the above issue, please re-enter a valid Decal #, or select 'Yes' from the dropdown to stop this workflow.

If you have any questions, please email the Fixed Asset Workflow administrators at wf-fixedasset-admins@memphis.edu.

* Decal #:

* Stop Workflow: Yes ▾

Worklist
Equipment Location Change

Hide Menu Logoff Help

An Error Has Occurred
You must correct the following error(s) before proceeding:
The "New Location Code (Must be 6 digits)" field requires text.
The "Location Change Reason (Max 150 Char)" field requires text.

*Required Field
*** TBANR ***

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

Decal #: 012929500
Description: Apple Desktop IMAC 21.5
Make: Apple
Model: IMAC
Serial Number:
Organization: 217400 - Navy ROTC
Current Location: 106591 - Hayden Hall 4A

* New Location Code (Must be 6 digits): 106591

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

* Location Change Reason (Max 150 Char): error

* Stop Workflow: Yes

NOTE

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

Complete Save & Close Cancel

[Top](#)



Error Email

- Invalid decal
- Asset was previously disposed/zero valued –
must stop workflow item
- Another workflow is currently active - **must
stop workflow item**
- Asset belongs to another organization -
must stop workflow item

FFIMAST – Enter Decal – “Go” Next Block 2 times

Fixed Asset Master Query FFIMAST 9.3.6 (PROD)

Asset Tag: 011327300 Start Over

Insert Delete Copy Filter

PROCUREMENT INFORMATION

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	10000 Fieldhouse 361		

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

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

TRAINING

learning curve

UTILITIES & REPORTS

budget overexpenditures
e-Print

Equipment Reps List by Organization

Expand All

Collapse All

Export to Excel

+ 10000
+ 20000
+ 30000
+ 40000
- 50000

ORGN	Title	Equipment Rep	E-Mail
500000	VP Business and Finance	Ladonnal Curry	lcurry
500100	University Initiatives	Ladonnal Curry	lcurry
500101	Crisis Management	Shelby Slater	slslater
500102	Shared Services Center	Ladonnal Curry	lcurry
501000	Business and Finance Support Svcs	David Parks	dparks
502000	Conference Planning and Operations	Monique Savage	mlsavage
503000	Police Services	Derek Myers	dmyers
510000	AVP Finance	Amelia Cole	abcole
511000	Accounting Office	Montoya Williams	misom
511030	Grants and Contracts Accounting	Montoya Williams	misom
512000	Hotel Conference Center	Lorrean Lim	llim
513000	Payroll Office	Montoya Williams	misom
514000	Bursar	Keri Means	klmeans
515000	Financial Planning	Susan Hance	shance

No matter what kind of error or resolution is, you have to go back to workflow to either continue or stop the workflow.

The screenshot displays the myMEMPHIS Production Staging web application in a Mozilla Firefox browser. The browser's address bar shows the URL: `mytest.memphis.edu/tag.70af0913f051e509.render.userLayoutRootNode.up?uP_root=root&uP_sparam=activeTab&...`. The page header features the myMEMPHIS logo and the text "Production Staging". Below the header, a navigation bar contains tabs for Home, eCampus Resources, Workflow, Ethnicity Survey, Employee, Finance, Alumni, Student, Account\$, eCampus Student, and Adv. The main content area is divided into several sections:

- Workflow Worklist:** A table with columns for Organization, Workflow Name, Activity, Created, and Details. A red arrow points to the row for "Equipment Location Change" with ID "000108592" and status "Ready". Below the table are links for Refresh, Show Entire Worklist, and Open Workflow.
- Workflow My Processes:** A section showing the user's current processes, including "UOM Equipment Location Change" and "UOM Equipment Transfer".
- Workflow Alerts:** A section with a table for Instance Name, Date, and Process Name, and links for Show Alerts Page and Open Workflow.

The footer of the page contains contact information and copyright details: "Got a Question? Ask TOM | Contact Us | Memphis, TN 38152 | 901/678-2000 | Copyright 2009 University of Memphis | Importa...". The Windows taskbar at the bottom shows the Start button and several open applications, including Banner Workflow 8.0, Workflow link - Windo..., myTest - Mozilla Firefox, and Document1 - Microsof... The system clock indicates the time is 9:49 AM.

To stop the workflow, select 'Yes' and click 'Complete'.

myMemphis

Back to Workflow Tab E-mail Datebook

Enter Equipment Transfer Transaction Type

*** TBANR ***

This is not surplus

Decal #: 000111876
Description: Hewlett Packard Laser Jet Printer
Make: Hewlett Packard
Model: 2200DTN
Serial Number: SCNGSB00834
Current Organization: 286000 - Vice Provost Extended Programs
Current Location: 102294 - Brister Hall 201

* Transaction Type: Transfer to Surplus
* New Organization Code: 860000
Please enter 860000 for Surplus.
[Click here](#) to search for a valid organization code.

* Transfer Reason: Case 6 - transfers
If you would like to stop this workflow instance, select 'Yes' below.

* Stop Workflow: Yes

Complete Save & Close Cancel



Unapproved or Incompleted Workflow


- **Receive System Generated Emails**
- **Follow up email from Financial Reporting**
- **Periodically check workflow tab**




Annual Inventory Confirmations

- Equipment Inventory confirmation is an important part of our internal control process. It enables us to accurately report the existence and value of our equipment to the Board of Trustees, State of Tennessee and other stakeholders.
- State Auditors and UOM's internal auditors review Inventory Confirmations as part of their normal audit procedures. Failure to complete **100%** of Inventory Confirmations could result in an audit exception or finding.
- If you still have not submitted Equipment Inventory Confirmations that were due on March 31, 2019 please complete ASAP.

ePrint Report – FYFR001 (Fixed Asset Inventory Listing)

 **Banner ePrint**

- [Banner Development Repository](#)
- [Banner Foundation Repository](#)
- [Banner Finance Repository](#)
- [Banner Student Repository](#)
- [Banner Financial Aid Repository](#)
- [Banner HR Repository](#)

 **Banner ePrint**

















Select Report from Repository **Banner Finance**

Banner Finance Repository
wjgoodwn

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Banner Finance

	Report	Description	Latest Date
 	FYFR001- Fixed Asset Inventory Listing	Fixed Asset Inventory Listing	Thu Feb 11, 2016 11:15am
 	FYGH002 - Schedule 2 - Current Funds Revenues	Schedule 2 - Current Funds Revenues	Fri Jul 10, 2015 12:30pm
 	FYGU001 - General Ledger Funds Summary	General Ledger Funds Summary	Mon Oct 12, 2015 10:00am
 	FYGU001 - Gen Ledger Funds Summary - CSV	General Ledger Funds Summary - CSV	Wed Mar 09, 2016 10:15am
 	FYGU002 - Operating Ledger Summary by Organization	Operating Ledger Summary by Organization	Sat Oct 10, 2015 07:00am
 	FYGU002 - Operating Ledger Summary by Organization-CSV	Operating Ledger Summary by Organization - CSV	Mon Feb 08, 2016 2:15pm
 	FYGU003 - General Ledger Accounts Summary by Fund	General Ledger Accounts Summary by Fund	Fri Sep 06, 2013 09:01am
 	FYGU004 - General Ledger Accounts Summary by Fund Type	General Ledger Accounts Summary by Fund Type	Thu Jul 30, 2015 11:00am

Previous

FYFR001- Fixed Asset Inventory Listing

Next

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FFIPROC

Fixed Asset Procurement Query FFIPROC 9.0 (PROD)

ADD RETRIEVE RELATED TOOLS 1

FIXED ASSET PROCUREMENT QUERY

Basic Filter Advanced Filter

Origination Tag Permanent Tag Description Origination Tag Cancel Date Purchase Order Add Another Field ...

Clear All Go

Origination Tag	Permanent Tag	Description	Cost	Origination Tag Cancel Date	Purchase Order	Invoice	Receiver	Vendor	Other Sources	Type	Submission Num	Serial Number/VIN	Asset Type
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Fixed Asset Procurement Query FFIPROC 9.0 (PROD)

ADD RETRIEVE RELATED TOOLS

FIXED ASSET PROCUREMENT QUERY

Active filters: Serial Number/VIN: C02TL02THF1P Clear All Filter Again

Origination Tag	Permanent Tag	Description	Cost	Origination Tag Cancel Date	Purchase Order	Invoice	Receiver	Vendor	Other Sources	Type	Submission Num	Serial Number/VIN	Asset Type
T00134347	013522900	A-MBP 13.3 SPGR/2.9GHZ/8...	1,899.00		P0210050	TB155923		U00004348				C02TL02THF1P	NC

10 Per Page Record 1 of 1

Financial Reporting Website – Fixed Assets

<http://www.memphis.edu/accounting/fixedassets.php>

Fixed Assets

Questions? wf-fixedasset-admins@memphis.edu

Obtaining a New Decal

- Complete the [Tagging Log Form](#)
- E-mail the Tagging Log Form to wf-fixedasset-admins@memphis.edu
- Financial Reporting will provide the UOM decal and enter the information into the Banner Fixed Asset System

Inventory Confirmations



- Monthly Eprint Report - FYFR001 (Fixed Asset Inventory Listing) [Visit [e~Print](#)]
- [Inventory Confirmation Instructions](#)
- [Items in Department Not on Inventory Form](#)

Fixed Asset Workflow

- [Fixed Asset Workflow](#)
- [Fixed Asset Workflow Instructions](#)

Forms

- [Report of Lost or Stolen Property](#)
- [Request for Off-Campus Use of Equipment Form](#)
- [Tagging Log Form](#)
- [List of Asset Types](#)
- [List of Account Codes](#)
- [Location Code Search](#)



Equipment Inventory Policy:
<http://umwa.memphis.edu/umpolicies/UM1772.htm>

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

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

Accounting Office: 678-2271

Who Knew?

<i>Workshops</i>	<i>Date</i>
❖ Guess Who's Coming to CAMPus? UC Room261	Tuesday, April 23, 2019 10:00 - 11:00 AM
❖ Staff Assessment Management System Training Admin Bldg. - Room 178	Thursday, April 25, 2019 3:00 - 4:30 PM
❖ TIGERBUY Training Admin Bldg. - Room 119	Thursday, April 25, 2019 9:00 - 10:00 AM

What's New?



What's Due?

Activity	Deadline
Inventory Confirmations (for orgs/departments not yet submitted)	Friday, April 26, 2019
Annual Staff Performance Appraisals and Evaluations	Tuesday, April 30, 2019
Process FY-19 Purchase Requisitions that require bidding (\$10,000 or more)	Tuesday, May 14, 2019
Process FY-20 Purchase Requisitions that require bidding (\$10,000 or more) with July 1, 2019 contract start date	May 14 - June 30, 2019
Process FY-20 Purchase Requisitions that do NOT require bidding	Beginning Monday, May 14, 2019



Next Focus on Finance

May 16, 2019

1:30-3:00 PM

FIT 103

- **Comments or suggestions?**
Email: bffin@memphis.edu
- **Focus on Finance website:**
<http://memphis.edu/focusonfinance>