

Fixed Asset Workflow

Equipment Location Change

Accounting Office
July 2023

- Equipment Location Change Workflow is a Banner online process for changing an equipment's location **within** an organization.
- Only Equipment Representatives (ER) can **initiate** a workflow.
- ERs are assigned by the Financial Manager (FM) of the organization via the Finance Program Guide (<https://umwa.memphis.edu/eqpreps/index.php/main/manage>). *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

<https://umwa.memphis.edu/programguides/eqreps.php>



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
- 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

Expand All

Collapse All

Export to Excel

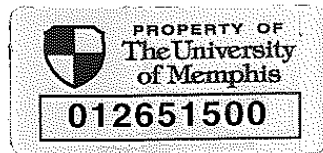
+ 10000
+ 20000
+ 30000
+ 40000
+ 50000
+ 60000
+ 70000
+ 80000
+ 90000

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

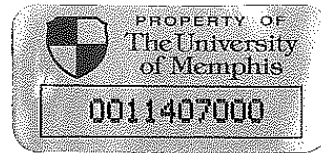
Search

Important Notes before Starting the Workflow

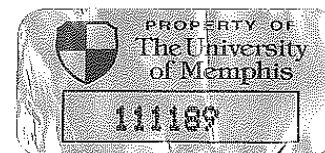
- PTAG_Code is an UOM Asset tag (also refers to a Permanent TAG, P-tag, Decal). This is a silver tag with UOM logo.
- A valid 9-digit PTAG Code (decal #) number is needed. Three different kinds of decals have been used.



Standard decal.
Enter all 9 digits
in Workflow.



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



Add 3 zeros before
entering the 6 digit
to Workflow.

Use Banner INB screen FFIMAST to check asset status

Assets that were previously zero-valued, cannibalized, surplus, 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

Navigation: Previous, Next, Search, etc.

Use Banner INB screen FFIMAST to check organization for the Asset Tag (P-Tag). **Be sure that you are the ER for the Organization listed.**

Fixed Asset Master Query FFIMAST 9.3.6 (PROD)

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

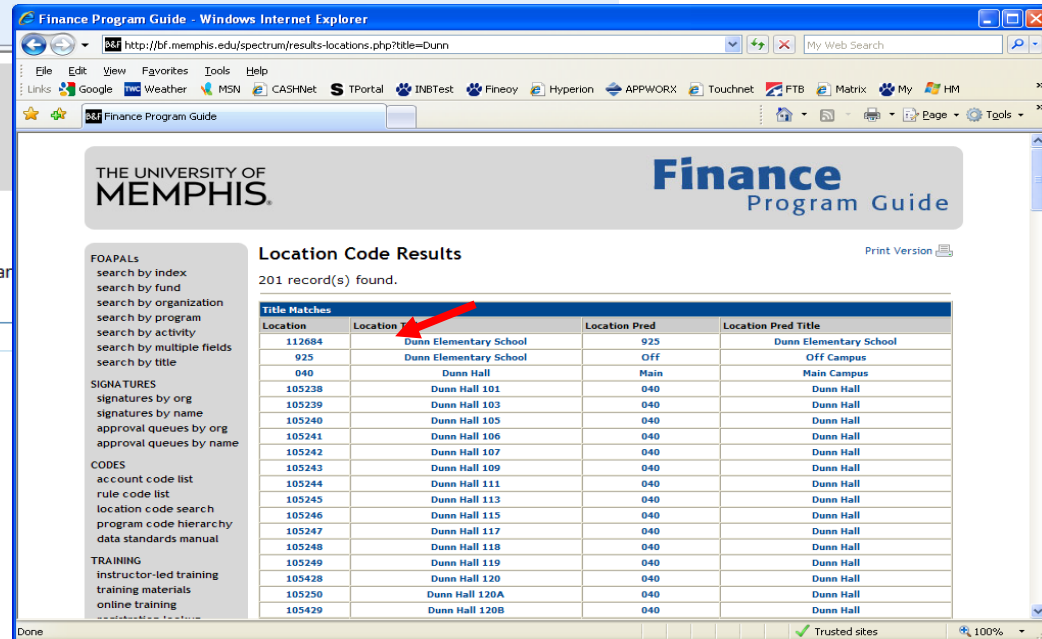
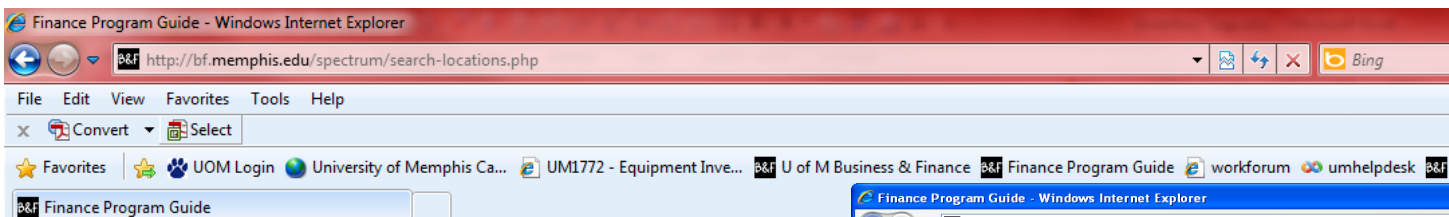
Document		Document Tag Date	
Type		Source Submission	
Sequence			

Transfer Data

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

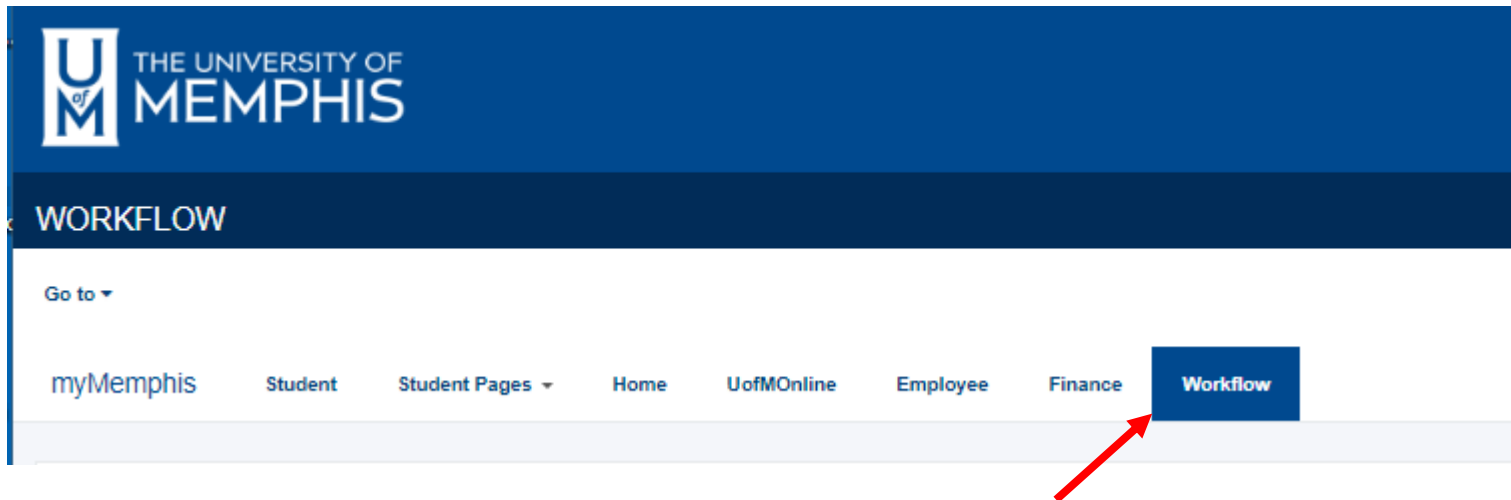
Location Code

Finance Program Guide - Type in any part of a building name and click “Search”. A list of rooms in the building will be displayed.



Equipment Representative: To initiate a workflow

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



scroll down to 'My Processes' and select 'UOM Equipment Location Change'

FLOW

Memphis

Student

Student Pages ▾

Home

UofMOnline

Employee

Finance

Workflow

Workflow

Refresh

Open Workflow

0 of 0

My Processes

Refresh

Open Workflow

UOM

UOM Equipment Location Change

UOM Equipment Transfer

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

Start Workflow

Organization: UOM

Workflow Name: UOM_FIN_EQUIP_LOCN_CHANGE:2

Workflow Specifics Name:

Relocate Microsoft Surface Pro

Priority:

Normal


Workflow Note:

Required Parameters

PTAG_CODE *:

013045800

Description: Equipment Decal Number

 Start Workflow

Note: Workflow Specifics Name and Workflow notes are not required

Required: Enter 9-digit PTAG_Code (UofM Decal number)
DO NOT copy and paste, manually enter the code.

You will be redirected to your 'Worklist' to continue the process. Refresh your browser to display the workflow **OR** wait and click on the 'Banner Workflow' link in the email you receive.

From: From: donotreply@memphis.edu <donotreply@memphis.edu>

Sent: Wednesday, May 10, 2023 3:19 PM

To: Colette Williams (colette) <Colette.Williams@memphis.edu>

Subject: Equipment Location Change -013045800 - Enter New Location

Please login to [Banner Workflow](#) to access this worklist item and enter the transfer details for the following equipment:

Decal #: 013045800

Description: Microsoft Surface Pro 3, Intel Core i7, 25

Make: Microsoft

Model: Surface Pro 3

Serial Number: 002448344253

Organization: 500104 - University Process Improvement

Current Location: 100791 - Johnson Hall 5

Click on the correct Equipment item in your Workflow list to continue.

Worklist

[Advanced Search](#)[Workflc](#)

Status	Organization	Workflow	Activity	Priority	Created
	UOM	Equipment Location Change - 013045800 Ready	Enter_New_Location	Normal	01-Jun-2023 01:36:04 PM
	UOM	Equipment Transfer - 013563400 Ready	Get_Relinquishing_Financial_Manager_Approval	Normal	01-May-2023 01:59:46 PM

Scroll down the screen and verify the asset info displayed is correct. Enter the new location code and the reason for the location change. Click '**Complete**' to finish the workflow.

If necessary, you may 'STOP' the workflow by selecting 'YES' from the dropdown box of the 'Stop Workflow' field at the bottom of the screen.

Enter New Location Code

Please enter a new location code and location change reason for this equipment.

We ask that you 'Complete' this workflow activity as soon as possible so that this workflow process can complete and update Banner.

Please contact Accounting if you have any questions about the location code.

Decal #:

013045800

Description:

Microsoft Surface Pro 3, Intel Core i7, 25

Verify Correct Asset

Make:

Microsoft

Continue next Slide

Enter New Location Code

Model:

Surface Pro 3

Verify Correct Asset

Serial Number:

002448344253

Organization:

500104 - University Process Improvement

Current Location:

100791 - Johnson Hall 5

New Location Code (Must be 6 digits) *:

100088

Required: Enter 6-digit New Location Code

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

Continue next Slide

Enter New Location Code

Location Change Reason (Max 150 Char) *:

Process Improvement no longer needs equipment

Required: Reason for Change

Stop Workflow *:

No

You can stop the Workflow by selecting '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

Click 'Complete' to finish the workflow

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

The Equipment Representative will be notified via email location has been updated.

From: donotreply@memphis.edu <donotreply@memphis.edu>
Sent: Thursday, June 1, 2023 2:45 PM
To: Colette Williams (colette) <Colette.Williams@memphis.edu>
Subject: Equipment Location Change - 013045800 - Completed

The location change for the following equipment has been processed:


Decal #: 013045800
Description: Microsoft Surface Pro 3, Intel Core i7, 25
Make: Microsoft
Model: Surface Pro 3
Serial Number: 002448344253
Organization: 500104 - University Process Improvement

Previous Location: 100791 - Johnson Hall 5

New Location: 100088 - Administration 151

Transfer Reason: PIP no longer needs equipment

Banner Fixed Asset System will be updated. You can use Banner INB screen FFIMAST to view whether the location is updated by entering the P-Tag number in the Asset Tag field and page down to view the Procurement Information.

 @ ellucian Fixed Asset Master Query FFIMAST 9.3.16 (TBANR)

Asset Tag: 013045800

▼ PROCUREMENT INFORMATION

Origination Tag	T00125880	Permanent Tag	013045800	Microsoft Surface Pro 3, Intel Core i7, 25
Vendor Code	U00016426	Staples Contract and Commercial Inc	Submission Number	0
Purchase Order	P0160376		Invoice Item	1
Purchase Item	2		Cancel Date	
Receiver			Credit Memo	No
Receiver Date			Installments	
Invoice	TB097046		Recurring	
Invoice Date	12/15/2014			
Other Source Data				
Document		Document Tag Date		
Type		Source Submission		
Sequence				
Transfer Data				
Date	06/01/2023	Grant		
COA	U	University of Memphis	Custodian ID	
Organization	500104	University Process Improvement	Equipment Manager	
Location	100088	Administration 151		

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

Accounting Office: 678-2271