Department of General Accounting
Fixed Asset Workflow User Guide

For Intra and Interdepartmental Changes to Equipment Location and Ownership

Purpose

All tagged equipment is recorded in Banner with an assigned location and responsible budget code. The responsible budget code is the department in custody of the asset and the Budget Unit Director assumes responsibility for the asset. When equipment is moved or transferred, an electronic workflow process must be utilized. This workflow replaces the paper form to complete an Intradepartmental (location change only) and Interdepartmental (location and responsible budget unit change) transfer.

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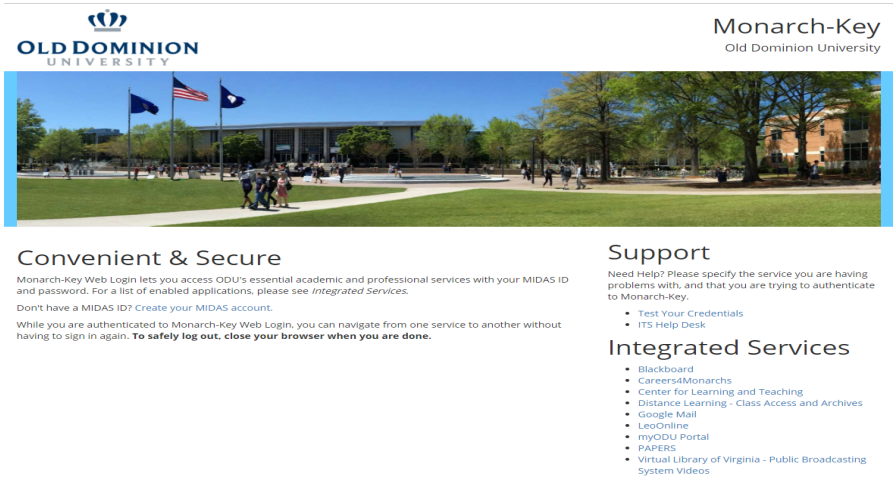
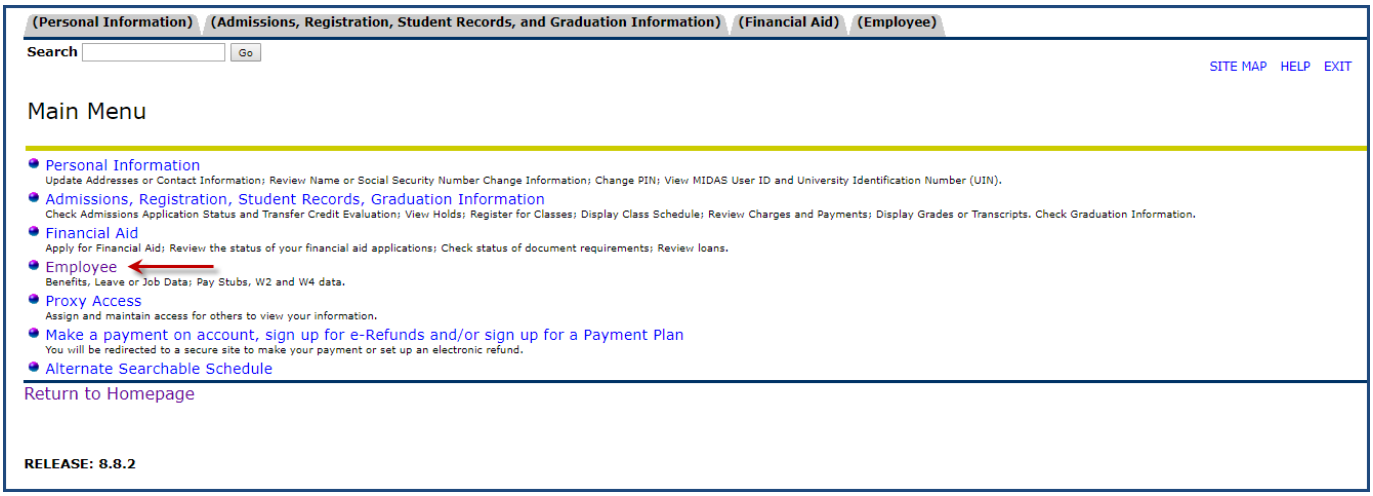
Section C	FAC completion of transfer

A. Initiating a Transfer (by Fixed Asset Coordinator or Budget Unit Director only)

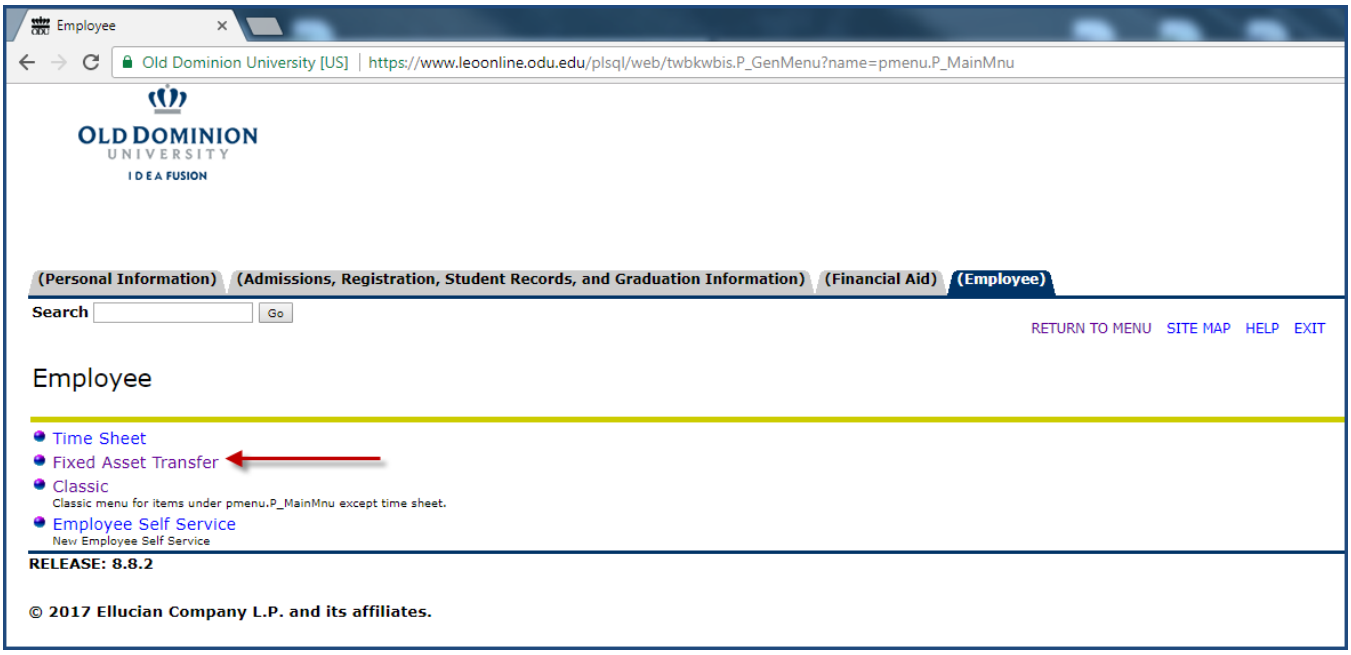
1. Navigate to https://shibboleth.odu.edu/. Choose LeoOnline from the right column and login using your Midas ID and password.



2. At the Main Menu, click Employee.



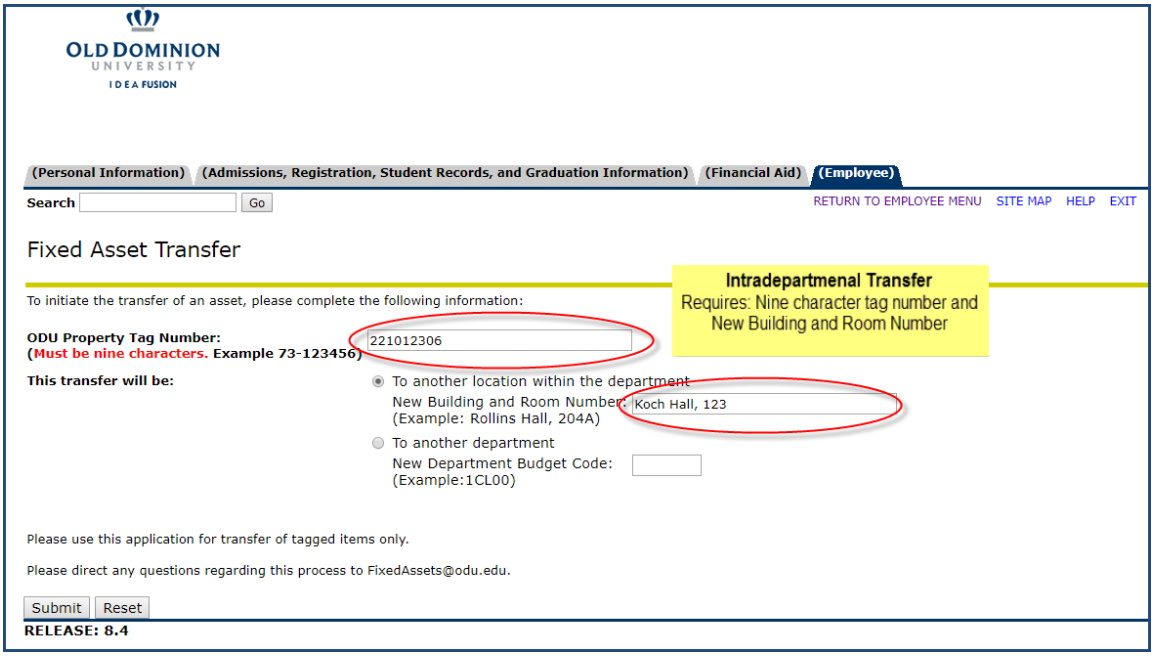
3. Click the Fixed Asset Transfer option.

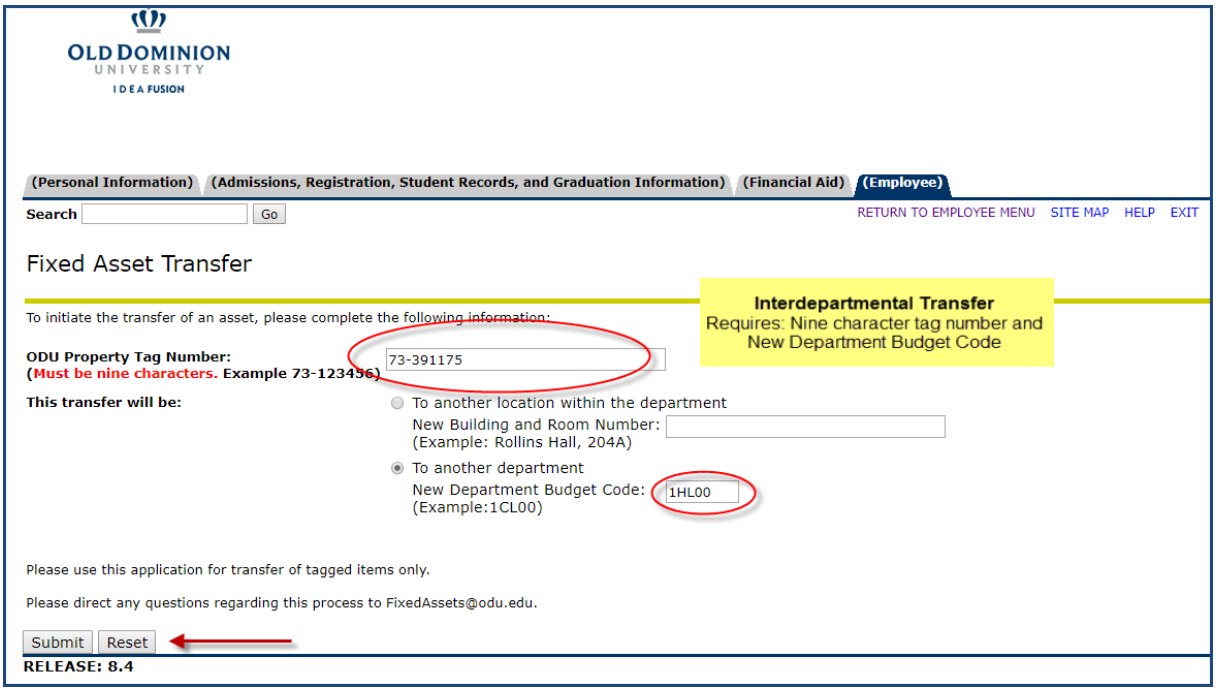


4. This brings up the Fixed Asset Transfer form for Intradepartmental and Interdepartmental transfers. Enter required fields and click the Submit button or click the Reset button to change the required fields.

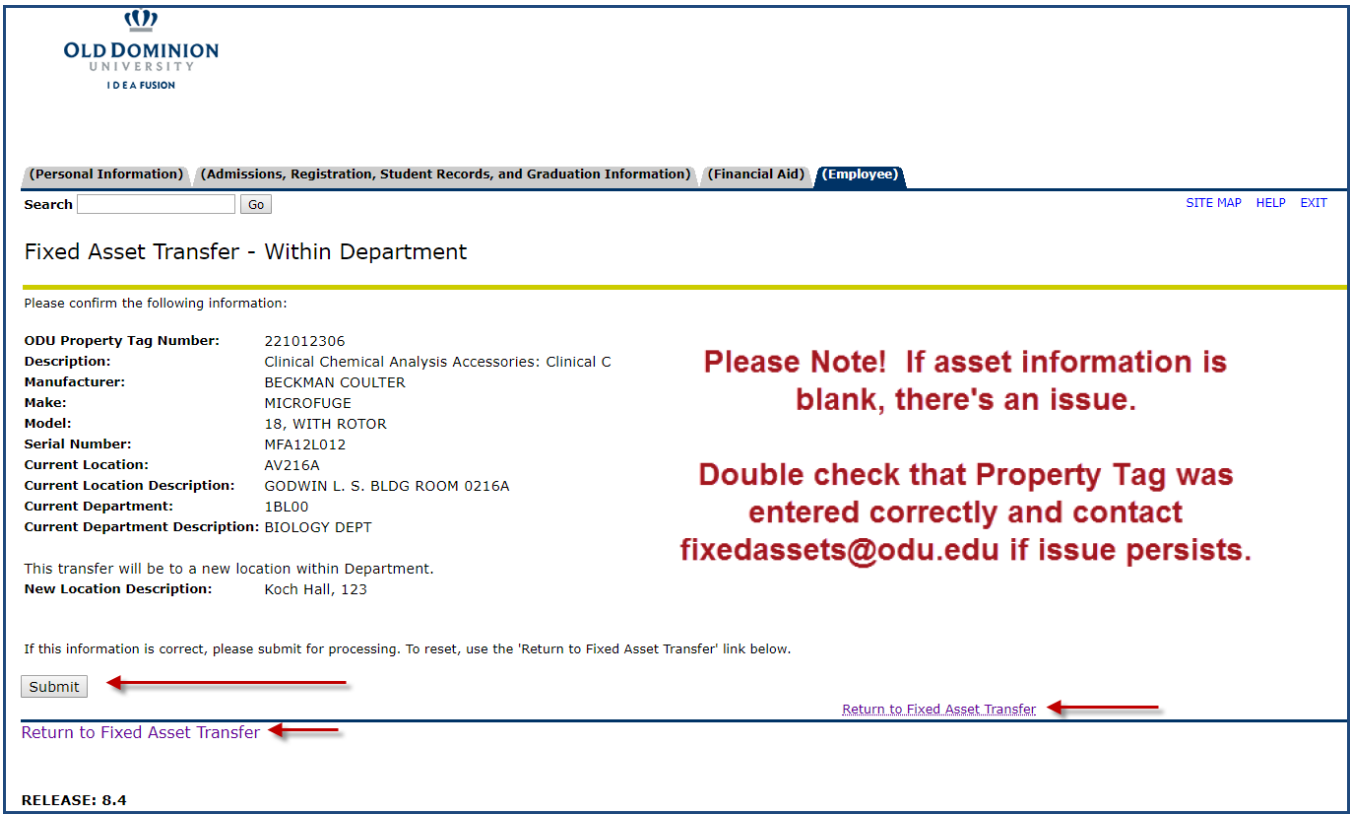
Required fields:

- Enter the 9 character ODU Property Tag Number.
- Select the type of transfer.
  - o *Intra*departmental: To another location within the department
  - o *Inter*departmental: Asset is being transferred out of the department and into a new custodial budget code.
- Provide either the new building/room number or new budget code.

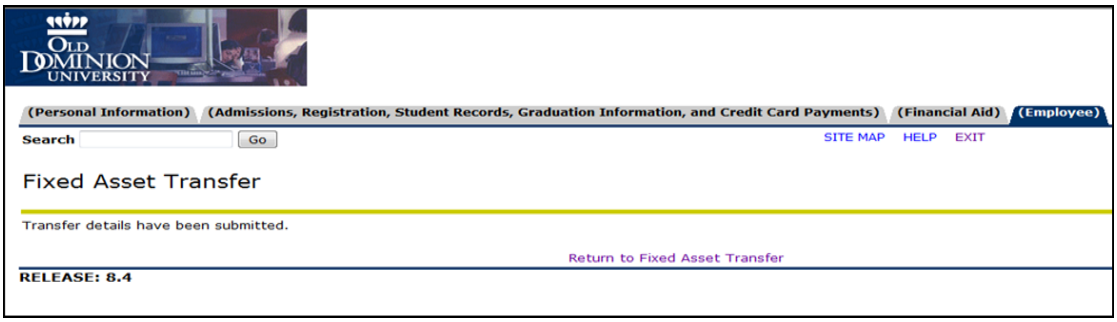




5. Review asset detail and confirm that the correct asset is being transferred. Click the Submit button to initiate the transfer or click "Return to Fixed Asset Transfer" to enter a different tag number.



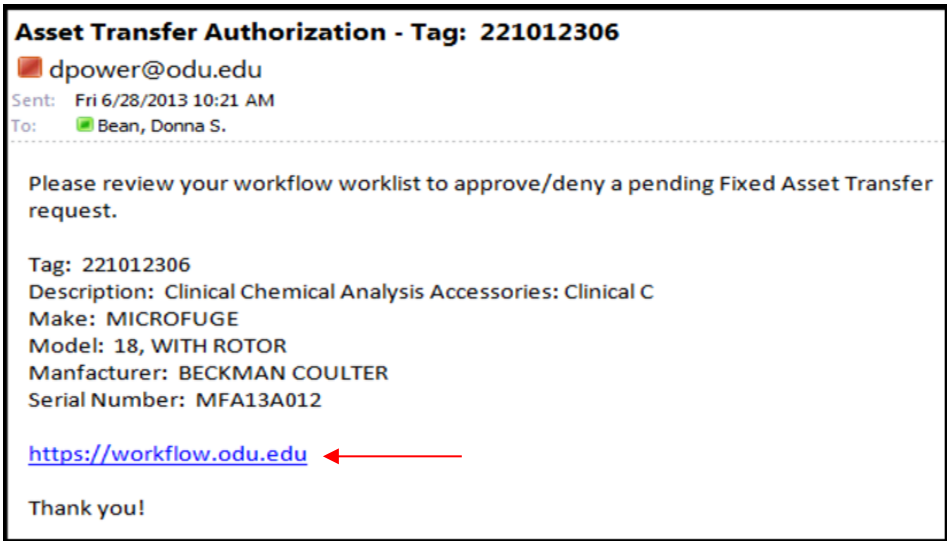
6. Once submitted, the transfer has been initiated and sent to the Budget Unit Director for approval.



B. Approving a Transfer

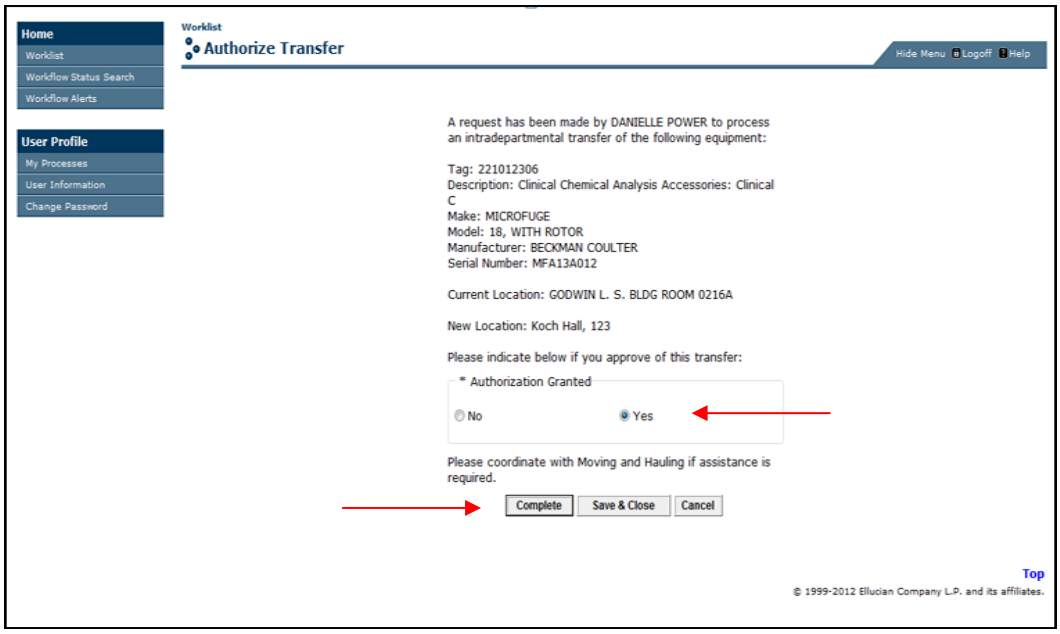
1. The Budget Unit Director will receive an email requesting action on a transfer. Click on the link to access workflow and login using your Midas ID and password.

   NOTE: The approvals are sent to the individual listed as Budget Unit Director on the Banner table maintained by Data Control.



2. Your Worklist will contain the assets awaiting review and dispostion. Click on the tag number to display the details.

3. Review transfer details, either approve or deny the transfer, and click the Complete button. Save & Close or Cancel button takes you back to the worklist.



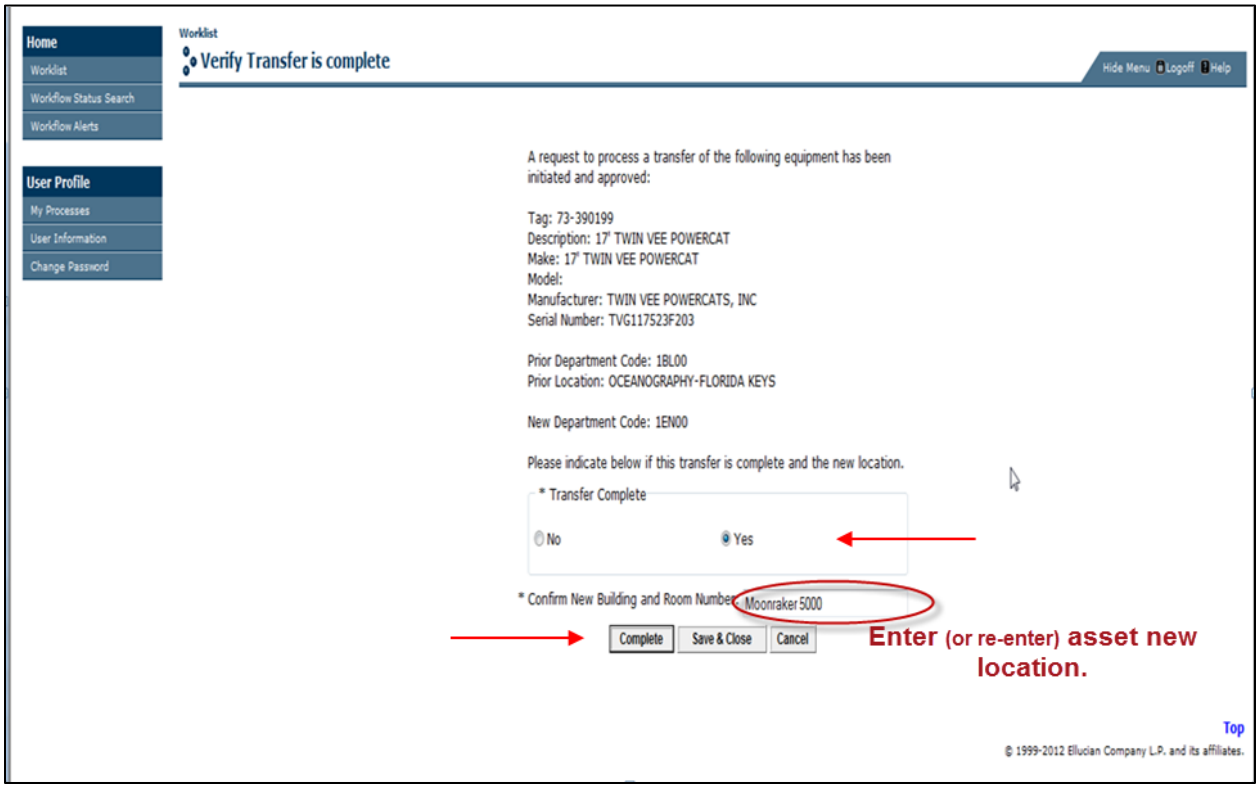
a. If the transfer is denied, the initiator will be notified by email and the workflow is complete.
b. For Intradepartmental transfer, the Fixed Asset Coordinator will be notifed by email to confirm the asset was moved. **(See section C)**
c. For Interdepartmental transfer, the receiving Budget Unit Director will receive an email to approve the receipt of the transfer. **(Follow steps B 1-3 above)**

C. Confirming Asset has Moved

1. The Fixed Asset Coordinator will receive an email requesting the new location of the asset. Click on the link to access workflow and login using your Midas ID and password.

2. Your Worklist will contain the assets awaiting review and action. Click on the tag number to display the details.

3. Review tag details, provide new asset location (building & room number), and confirm the asset has been physically moved to the new location. Click the Complete button.



4. When the new location is updated in Banner by the Fixed Asset Accountant, all parties will receive an email confirming the change.

Please contact the Fixed Asset Accountant at 3-5022 or FixedAssets@odu.edu with any questions or concerns.