

For Intra and Interdepartmental Changes to Equipment Location and Ownership

Purpose

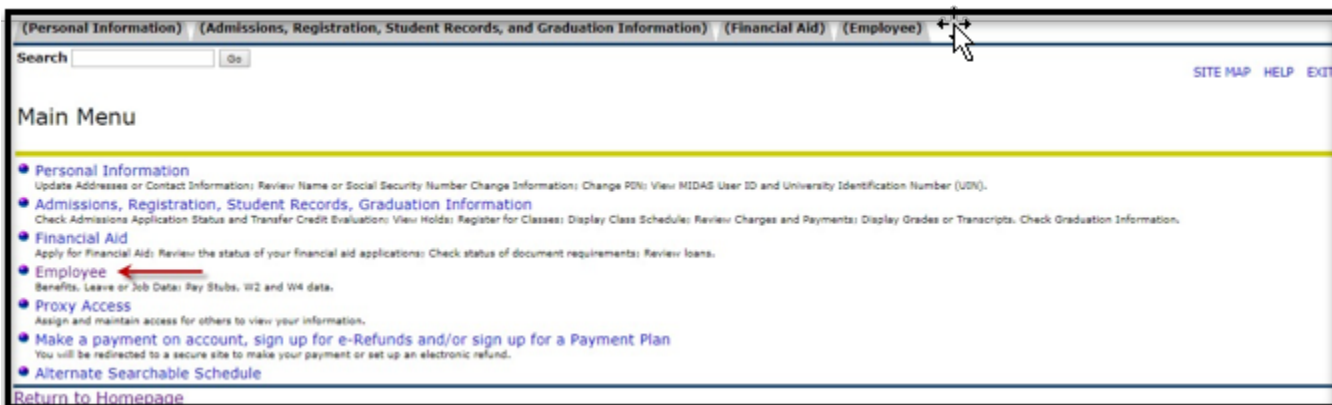
All tagged equipment is recorded in Banner with an assigned location and responsible budget code. The responsible budget code is the department in custody of the asset and the Budget Unit Director assumes responsibility for the asset. When equipment is moved or transferred, an electronic workflow process 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.

Contents

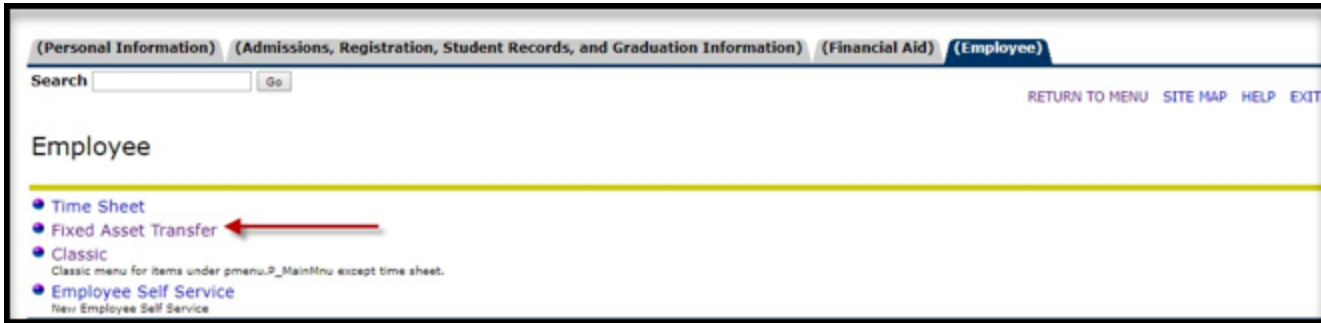
Section A	Initiating a Transfer – <i>typically completed by an FAC (Fixed Asset Coordinator)</i>
Section B	BUD Approval of transfer
Section C	FAC completion of transfer

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

1. Login to Leo Online using link - <https://leoonline.odu.edu/homepage.htm>
2. Click on “Enter Leo Online News and Secure Area”.
3. Scroll down and click on “Enter Secure Area”.
4. Login using your Midas ID and password.
5. At the Main Menu, click “Employee”.



6. Click the "Fixed Asset Transfer" option.



7. This brings up the Fixed Asset Transfer form for Intradepartmental and Interdepartmental transfers. Enter the 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.
 - *Intradepartmental*: To another location within the department
 - *Interdepartmental*: 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.
- Click "Submit"

Fixed Asset Transfer

To initiate the transfer of an asset, please complete the following information:

ODU Property Tag Number:
(Must be nine characters. Example 73-123456)

This transfer will be:

To another location within the department
New Building and Room Number:
(Example: Rollins Hall, 204A)

To another department
New Department Budget Code:
(Example: 1CL00)

Please use this application for transfer of tagged items only.

Please direct any questions regarding this process to FixedAssets@odu.edu.

Fixed Asset Transfer

To initiate the transfer of an asset, please complete the following information:

ODU Property Tag Number:
 (Must be nine characters. Example 73-123456)

This transfer will be:

To another location within the department
 New Building and Room Number:

To another department
 New Department Budget Code:

Please use this application for transfer of tagged items only.

Please direct any questions regarding this process to FixedAssets@odu.edu.

Interdepartmental Transfer Requires : 9-character tag number and New Department Budget Code

8. 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.
 - a. Incorrect Information:

Fixed Asset Transfer - Within Department

Please confirm the following information:

ODU Property Tag Number: 12345
Description:
Manufacturer:
Make:
Model:
Serial Number:
Current Location:
Current Location Description:
Current Department:
Current Department Description:

This transfer will be to a new location within Department.
New Location Description: Rollins Hall, 204A

If this information is correct, please submit for processing. To reset, use the 'Return to Fixed Asset Transfer' link below.

Looks like you entered incorrect ptag number. Please verify ptag number and input it in correct format. Click on Return to Fixed Asset Transfer to go back to the form. Contact fixedassets@odu.edu if you have any issues.

[Return to Fixed Asset Transfer](#)

Please note! If asset information is blank there is an issue.

Click on "Return to Fixed Asset Transfer" and double check that Property Tag was entered correctly. Contact fixedassets@odu.edu if the issue persists.

- b. Correct information:

Fixed Asset Transfer - Within Department

Please confirm the following information:

ODU Property Tag Number: 123456789
Description: TEST FAW Microcomputers, Desktop or Tower based
Manufacturer: DELL
Make: COMPUTER, DESKTOP
Model: OPTIPLEX 7010
Serial Number: C30MRW1
Current Location: ZZ1000
Current Location Description: CLEARING ACCOUNT
Current Department: 12345
Current Department Description:



This transfer will be to a new location within Department.

New Location Description: Rollins Hall, 204A

If this information is correct, please submit for processing. To reset, use the 'Return to Fixed Asset Transfer' link below.

[Return to Fixed Asset Transfer](#)

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

Fixed Asset Transfer

Transfer details have been submitted.

[Return to Fixed Asset Transfer](#)

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.

FW: Asset Transfer Authorization for Budget Director approval - Tag: 123456789

From: John Doe <john.doe@odu.edu>
Sent: Friday, May 5, 2023 4:38 PM
To: Sam Johnson <sam.johnson@odu.edu>

The below transfer request is waiting for your authorization.

Tag: 123456789
Description: TEST FAW Microcomputers, Desktop or Tower based
Make: COMPUTER, DESKTOP
Model: OPTIPLEX 7010
Manufacturer: DELL
Serial Number: C30MRW1

Please follow the below steps to access workflow:

1. Click on the link to proceed – <https://workflow.odu.edu>
2. Login using your Midas id and password Click on worklist.
3. Click on the appropriate PTAG number. (Fixed Asset Transfer – Ptag#).
4. Please verify the information and select “Yes” or “No” based on your decision.
5. If you see an error, please contact FixedAssets@odu.edu.

Thank you!

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

The screenshot displays a software interface with a sidebar on the left and a main content area. The sidebar includes sections for 'Home' (with links to Worklist, Workflow Status Search, and Workflow Alerts) and 'User Profile' (with links to My Processes and User Information). The main content area is titled 'Worklist' and features a table with the following data:

Organization	Workflow	Activity	Priority	Created	
Root	Fixed Asset Transfer - 123456789 Ready	AuthorizeTransfer	Normal	18-May-2023 11:57:16 AM	
Root	Fixed Asset Transfer - 123456789 Ready	AuthorizeTransfer	Normal	12-May-2023 12:49:31 PM	

At the bottom of the table, there is a pagination control showing '1 - 2 of 2' and navigation buttons for 'First', 'Previous', 'Next', and 'Last'. A 'Go to page:' dropdown menu is set to '1'. A link labeled 'Show Reserved Items' is located at the bottom right of the table area. In the top right corner of the interface, there are 'Logoff' and 'Help' buttons.

- 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.

Home

- Worklist
- Workflow Status Search
- Workflow Alerts

User Profile

- My Processes
- User Information
- Change Password

Administration

- Business Component Catalog
- Enterprise Management
- Business Events
- Work Calendars
- Banner Workflow Modeler

Worklist

Authorize Transfer

Hide Menu Logoff Help

A request has been made by John Doe to process an intradepartmental transfer of the following equipment:

Tag: 123456789
Description: TEST FAW Microcomputers, Desktop or Tower based
Make: COMPUTER, DESKTOP
Model: OPTIPLEX 7010
Manufacturer: DELL
Serial Number: C30MRW1

Current Location: CLEARING ACCOUNT
New Location: Rollins Hall, 204A

Please indicate below if you approve of this transfer:

* Authorization Granted

No Yes

Please coordinate with Moving and Hauling if assistance is required.

Complete Save & Close Cancel

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- If the transfer is denied, the initiator will be notified by email and the workflow is complete.

From: Sam Johnson <sjhon@odu.edu>
Sent: Thursday, May 18, 2023 2:21 PM
To: John Doe <jdoe@odu.edu>
Subject: Transfer Rejected - Tag: 123456789

Your request to transfer the following asset has been rejected.

Tag: 123456789
Description: TEST FAW Microcomputers, Desktop or Tower based
Make: COMPUTER, DESKTOP
Model: OPTIPLEX 7010
Manufacturer: DELL
Serial Number: C30MRW1

- For Intradepartmental transfer, the Fixed Asset Coordinator will be notified by email to confirm the asset was moved. **(See section 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.

- 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.

From: Sam Johnson <sjhon@odu.edu>

Sent: Friday, May 5, 2023 5:53 PM

To: Caja, Jenny <jcaja@odu.edu>

Cc: Johnson, William <w2willi@odu.edu>

Subject: Verify Transfer completion for Fixed Asset Coordinator Approval- Tag: 123456789

Transfer of the following asset has been approved by the Budget Unit Director.

Pending action: Please update the Workflow worklist once the asset has been physically moved.

Tag: 123456789

Description: TEST FAW Microcomputers, Desktop or Tower based

Make: COMPUTER, DESKTOP

Model: OPTIPLEX 7010

Manufacturer: DELL

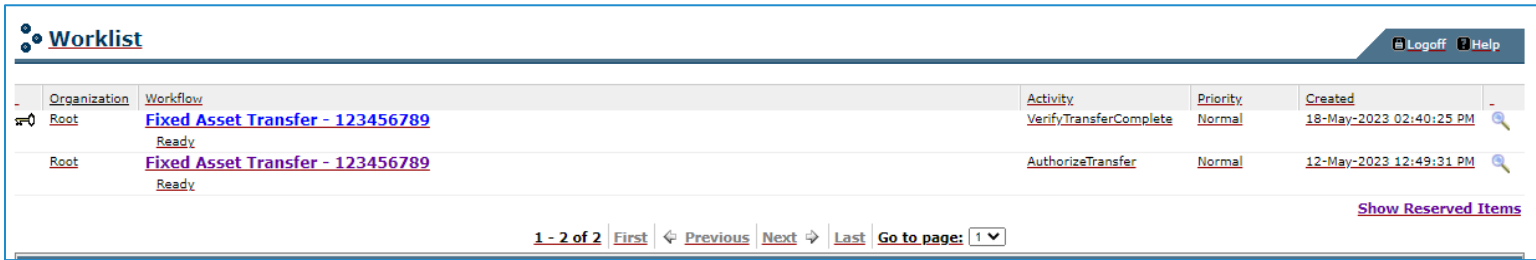
Serial Number: C30MRW1

Please follow the below steps to access workflow:

1. Click on the link to proceed – <https://workflow.odu.edu>
2. Login using your Midas id and password Click on worklist.
3. Click on the appropriate PTAG number. (Fixed Asset Transfer – Ptag#).
4. Please verify the information and select “Yes” or “No” based on your decision.
5. If you see an error, please contact FixedAssets@odu.edu.

Thank you.

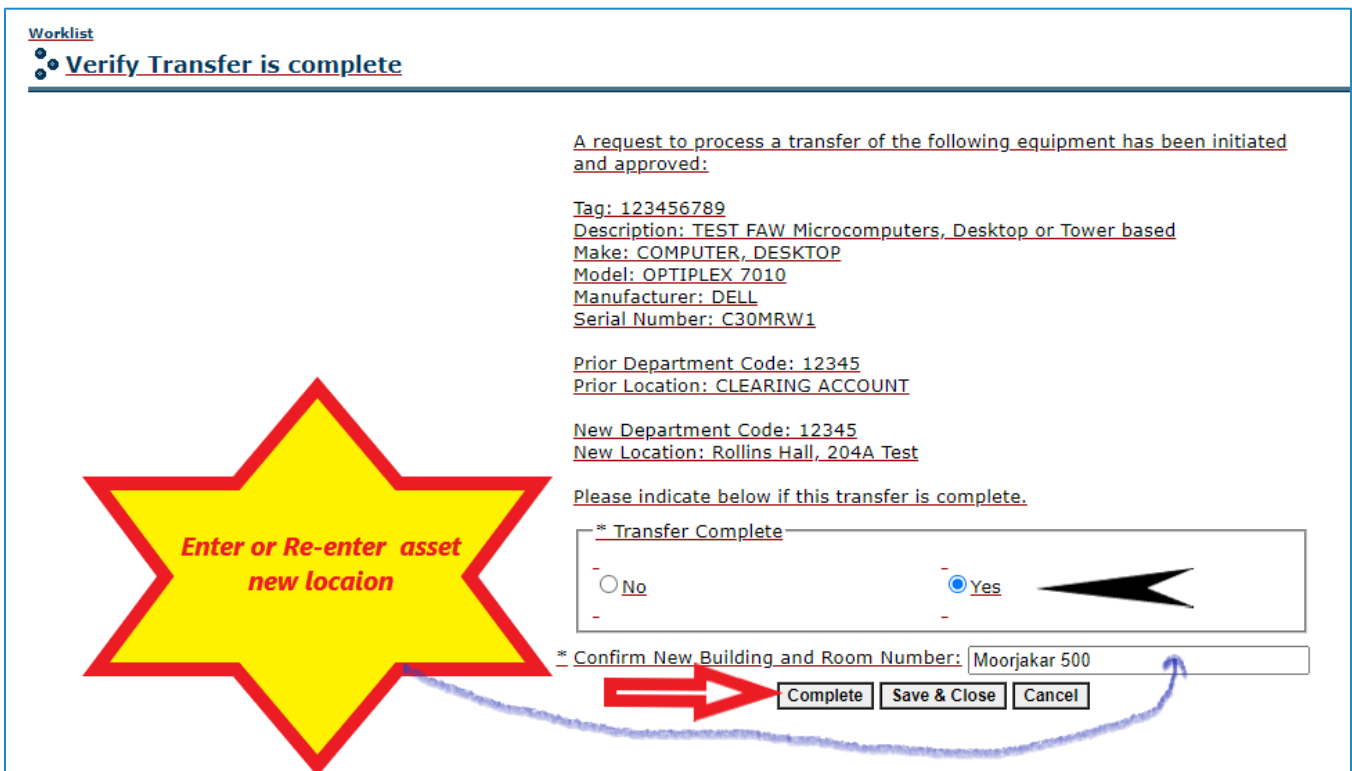
2. Your Worklist will contain the assets awaiting review and action. Click on the tag number to display the details.



Organization	Workflow	Activity	Priority	Created
Root	Fixed Asset Transfer - 123456789 Ready	VerifyTransferComplete	Normal	18-May-2023 02:40:25 PM
Root	Fixed Asset Transfer - 123456789 Ready	AuthorizeTransfer	Normal	12-May-2023 12:49:31 PM

1 - 2 of 2 | First | Previous | Next | Last | Go to page: 1

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.



Verify Transfer is complete

A request to process a transfer of the following equipment has been initiated and approved:

Tag: [123456789](#)
Description: [TEST FAW Microcomputers, Desktop or Tower based](#)
Make: [COMPUTER, DESKTOP](#)
Model: [OPTIPLEX 7010](#)
Manufacturer: [DELL](#)
Serial Number: [C30MRW1](#)

Prior Department Code: [12345](#)
Prior Location: [CLEARING ACCOUNT](#)

New Department Code: [12345](#)
New Location: [Rollins Hall, 204A Test](#)

Please indicate below if this transfer is complete.

* Transfer Complete

No Yes

* Confirm New Building and Room Number:

Enter or Re-enter asset new location

4. Fixed Asset Accountant receives email to verify record transfer.

From : : [Caja Jenny<jcaja@odu.edu>](mailto:jcaja@odu.edu)
Sent: Thursday, May 18, 2023 3:02 PM
To: Johnson, William <w2willi@odu.edu>
Subject: Verify Record Update for Fixed Asset Accountant Approval- Tag: 123456789

Transfer of the following asset has been completed.

Tag: 123456789
Description: TEST FAW Microcomputers, Desktop or Tower based
Make: COMPUTER, DESKTOP
Model: OPTIPLEX 7010
Manufacturer: DELL
Serial Number: C30MRW1

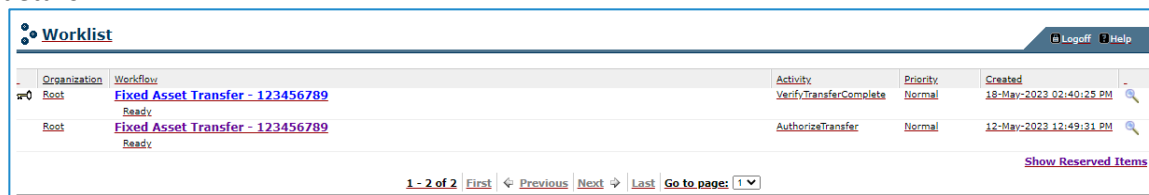
Please update the Workflow worklist item when the record has been updated.

Please follow the below steps to access workflow:

1. Click on the link to proceed – <https://workflow.odu.edu>
2. Login using your Midas id and password Click on worklist.
3. Click on the appropriate PTAG number. (Fixed Asset Transfer – Ptag#).
4. Please verify the information and select “Yes” or “No” based on your decision.
5. If you see an error, please contact FixedAssets@odu.edu.

Thank you.

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



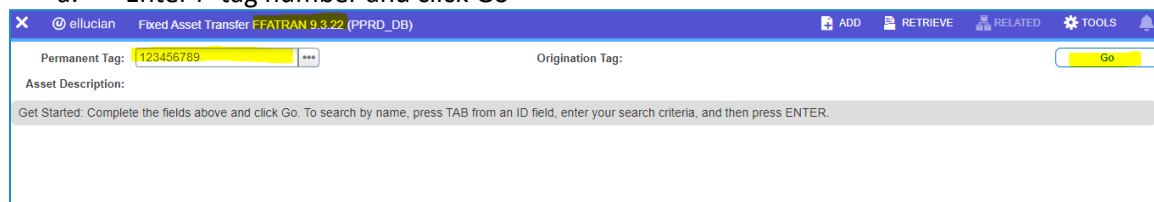
Organization	Workflow	Activity	Priority	Created	
Root	Fixed Asset Transfer - 123456789	Verfy/TransferComplete	Normal	18-May-2023 02:40:25 PM	
Root	Fixed Asset Transfer - 123456789	AuthorizeTransfer	Normal	12-May-2023 12:49:31 PM	

1 - 2 of 2 | First | Previous | Next | Last | Go to page: 1

[Show Reserved Items](#)

6. The new location needs to be updated in Banner form FFATRAN by the Fixed Asset Accountant. Go to Banner Admin forms and find FFATRAN form.

- a. Enter P-tag number and click Go



Fixed Asset Transfer **FFATRAN 9.3.22** (PPRD_DB)

Permanent Tag: Origination Tag:

Asset Description:

Get Started: Complete the fields above and click Go. To search by name, press TAB from an ID field, enter your search criteria, and then press ENTER.

- b. The FFATRAN form looks like below. Update new location and budget/orgn code.

Fixed Asset Transfer FFATRAN 9.3.22 (PPRD_DB)

Permanent Tag: 123456789 Origination Tag: 123456789 Asset Description: TEST FAW Microcomputers, Desktop or Tower based

FIXED ASSET TRANSFER

Sequence Num

Asset Transfer From

COA From Old Dominion University Telephone Type

Orgn From

Locn From

Grant From

Custodian From

Multiple Phone

Area Code

Phone Number

Extension

Asset Transfer To

COA To Old Dominion University Telephone Type

Orgn To

Locn To CLEARING ACCOUNT Area Code

Grant To

Custodian To

Multiple Phone

Area Code

Phone Number

Extension

Transfer Details

Transfer Document

Subordinate Type

Transfer Date

User Status

Text Exists

System Status

Transfer Reason

Condition Code Op

Equipment Manager

Disposal Code

Activity Date 05/05/2023 12:00:00 AM Activity User DUPPALA

7. Then go to worklist and mark “yes” or “no” based on record update made in banner.

Worklist

Verify Fixed Asset record has been updated

A transfer of the following equipment has been completed:

Tag: 123456789
 Description: TEST FAW Microcomputers, Desktop or Tower based
 Make: COMPUTER, DESKTOP
 Model: OPTIPLEX 7010
 Manufacturer: DELL
 Serial Number: C30MRW1

Prior Department Code: 12345
 Prior Location: CLEARING ACCOUNT

New Department Code: 12345
 New Location: Moorjagar 500

Please indicate below if the record has been updated:

* Record Updated

No Yes

8. Once the request is completed, all parties will receive an email confirming the change.

From: Johnson, William <w2willi@odu.edu>
Sent: Thursday, May 18, 2023 3:14 PM
To: John, Doe <jdoe@odu.edu>
Cc: Sam Johnson <sjhon@odu.edu>
Subject: Fixed Asset Transfer you initiated is Recorded - Tag: 123456789

Transfer of the following asset has been recorded.

Tag: 123456789
Description: TEST FAW Microcomputers, Desktop or Tower based
Make: COMPUTER, DESKTOP
Model: OPTIPLEX 7010
Manufacturer: DELL
Serial Number: C30MRW1

Former Budget Code: 12345
Former Location: CLEARING ACCOUNT

New Budget Code: 12345
New Location: Moorjekar 500

Thank you.

Please contact the Fixed Asset Accountant at 3-5022 or FixedAssets@odu.edu with any questions or concerns. This document is a joint effort between ODU Internal Auditors, ITS and Office of Finance.