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

1. Login to Leo Online using link - https://leonline.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”.

![Image of Leo Online login page]
6. Click the “Fixed Asset Transfer” option.

7. This brings up the Fixed Asset Transfer form for Intra(departmental and Inter(departmental 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.
  - Intra(departmental: To another location within the department
  - 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.
- Click “Submit”
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:

   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.

[Submit]

Return to Fixed Asset Transfer
9. 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 disposition. 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.

From: Sam Johnson <sjohn@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

b. For Intradepartmental transfer, the Fixed Asset Coordinator will be notified 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.
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](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](mailto: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.

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. Fixed Asset Accountant receives email to verify record transfer.
From: Caja Jenny <caja@odu.edu>
Sent: Thursday, May 18, 2023 3:02 PM
To: Johnson, William <wzwilf@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: C3OMRW1

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.

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

b. The FFATRAN form looks like below. Update new location and budget/orgn code.
7. Then go to worklist and mark “yes” or “no” based on record update made in banner.

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