

Transfers to a Surplus Department

TDP documents can be created to transfer property to a Surplus Department. The Basic Concepts for TDP documents are still valid, but further information is required to complete the process.

Surplus departments for a Member are flagged as such on FAMIS Screen 860, the Department Table. A Member may have more than one Surplus Department. When a Surplus Department is designated as the Destination Department on the TDP document create page, surplus-related fields are required, such as the fields for 'Surplus Property Entry'.

When the Destination Department is a Surplus Department, the department information is defaulted to the page using the information from FAMIS Screen 860, the Department Table. This information may be changed at the time of editing the document.

When certain types of assets are transferred, such as computer equipment, additional information is required. There is a Checkbox to be marked indicating compliance for wiping a computer hard drive. Also, there are fields on the asset item line that designate the Hard Drive Condition.

Transfer Departmental Property (cont'd)

1. Create the TDP To Surplus Document

- Click on FFX TAB -> Transfer -> Create Transfer
- Type a **Description** for the transfer document
- Type the **Source Department** and, optionally, a **Sub-Department**
- Type the code for the Surplus department as the **Destination Department**
- Click the Search 'Light bulbs' to select assets or type in the Asset Number(s)
- Pick the **Transportation Method** from the Drop-down box; certain values require entry to additional fields as seen below
- Click on '**Create Document**' button to activate the Transfer Document Tab

Canopy
The Texas A&M University System

EPA FFX FRS Routing System Campus: TEST DEFAULT CAMPUS (AB) Fiscal Year: 2008 Set CC/FY Logout

Main Menu > FFX > Transfer > Create Transfer

Transfer Search Transfer Document **Create Transfer**

Property Transfer Create

Doc ID: **NEW**

Transaction Description: ASSET TRANSFER

Source Department: MISP Source Sub Department:

Destination Department: ACCT Destination Sub Department:

Transfer to Campus: Select a campus.....

Asset Nbr Serial Nbr

Asset Number/Description	Asset Number/Description
01: <input type="checkbox"/> NI 0000000777	14: <input type="checkbox"/> NI
02: <input type="checkbox"/> NI 0000000888	15: <input type="checkbox"/> NI
03: <input checked="" type="checkbox"/> NI 0000100499	16: <input type="checkbox"/> NI
04: <input type="checkbox"/> NI	17: <input type="checkbox"/> NI
05: <input type="checkbox"/> NI	18: <input type="checkbox"/> NI
06: <input type="checkbox"/> NI	19: <input type="checkbox"/> NI
07: <input type="checkbox"/> NI	20: <input type="checkbox"/> NI
08: <input type="checkbox"/> NI	21: <input type="checkbox"/> NI
09: <input type="checkbox"/> NI	22: <input type="checkbox"/> NI
10: <input type="checkbox"/> NI	23: <input type="checkbox"/> NI
11: <input type="checkbox"/> NI	24: <input type="checkbox"/> NI
12: <input type="checkbox"/> NI	25: <input type="checkbox"/> NI
13: <input type="checkbox"/> NI	26: <input type="checkbox"/> NI

Surplus Property Entry

Transportation Method: SURPLUS PICK UP

First Name: Dave Last Name: Blue Middle:

Work Phone Number: 979 845 6455

Email Address: dave@tamu.com

Location: blue building

Create Document

Canopy, a Business Computing Services application. The Texas A&M University System. Version: 10/14/2008 11:38:18 AM Debug Info Site Management

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Transfer Departmental Property (cont'd)

2. Edit the TDP Document

The TDP document is now created and open for you to edit with additional information.

- To make changes to the **Header** information, click the **'Edit'** button beneath the section. This opens the fields that you can change. You cannot change the Destination Campus field; if you have made a mistake, you must cancel the document and create a new one. Be sure to click the **'Save'** button when finished.
- As desired, you can:
 - add assets using the **'Add Asset'** button (bottom of Destination Information section)
 - remove assets using the **'Delete'** link on the right of each asset
 - change some of the asset fields using the **'Edit'** link on right of each asset

Non-Inventory assets cannot be edited

- When the assets are associated with certain object codes, additional fields are required such as an entry in the checkbox for **Hard Drive Requirement** and entry of the **Drive Condition** on the asset item lines.

The screenshot shows the Canopy system interface for editing a Property Transfer Request. The document number is N800097. The destination campus is TEST DEFAULT CAMPUS (AB). The destination information table is as follows:

Item	Asset	Description	Bldg	Campus	Bldg Number	Room	Other Location	Group Code	Drive Cond	Amount	Edit Delete
1	000000777	TEST GED	AB		03205					\$2,000.00	Edit Delete
2	000000888	TEST COMP	AB		03205					\$20,000.00	Edit Delete
3	0000100499										Edit Delete
Total:										\$22,000.00	

The 'Hard drive requirements have been met' checkbox is currently unchecked. The 'Drive Cond' column in the table is highlighted with a red box.

Transfer Departmental Property (cont'd)

Example of Fields Open to Edit:

Canopy
The Texas A&M University System

EPA FFX FRS Routing System Campus: TEST DEFAULT CAMPUS (AB) Fiscal Year: 2008 Set CC/FY

Main Menu > FFX > Transfer > Transfer Document

Transfer Search Transfer Document Create Transfer

Document Number: N800097 Action: Select an action... Submit

Property Transfer Request

Document FY: 2008
Document Id: N800097 (TDP Report) Status: In Process (IP)
Route Document Id: Route Status:
Transaction Description: ASSET TRANSFER
Source Department: MISP Source Sub Department:
Destination Department: ACCT Destination Sub Department:
Transaction Reference: N800097 Transaction Reference 2: N800097
Destination Campus:
Created Date: 11/03/2008 Created By: WALSH, DIANE L
Last Update Date: 11/03/2008 Last Updated By: WALSH, DIANE L
Attachments:

Surplus Property Entry

Transportation Method: SURPLUS PICK UP
First Name: Dave Last Name: Blue
Phone Number: 979-845-6455 Middle:
Email Address: DAVE@TAMU.COM
Location: BLUE BUILDING

Hard drive requirements have been met

Edit

Destination - Room May not be Blank (Error: 8212)

Destination Information											
Item	Asset	Description	Bldg Campus	Bldg Number	Room	Other Location	Group Code	Drive Cond	Amount		
1	0000000777	TEST GED	AB	03205				NO HARD DISK DRIVE	\$2,000.00	Save Cancel	
2	0000000888	TEST COMP	AB	03205	2177				\$20,000.00	Edit Delete	
3	0000100499									Edit Delete	
									Total:	\$22,000.00	

Add Asset

FYIs to Destination Recipients
No records found to display.

Add FYI

Transfer Notes

Text
>>Note entered 11/03/08 by WALSH, DIANE L
This is a note.

Add Notes

Canopy, a Business Computing Services application.
The Texas A&M University System
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- You can add FYIs for additional routing using the 'Add FYI' button (bottom of *FYIs To Recipients* section)
- You can add Notes to the document using the 'Add Notes' button (bottom of *Transfer Notes* section)
- When finished with your edits, choose an 'Action' using the Drop-down List next to the document number: CLOSE, ROUTE, CANCEL

Transfer Departmental Property (cont'd)

3. Route the TDP Document

Transfers to Surplus follow the INTRA-Member rules for Routing and Approvals. The paths that the document follows are determined by the structure of the Source and Destination Departments. In this case, the Destination Department will always be a SURPLUS designated department on Screen 860.

All Approvers and Signers in the Routing Paths can change the Destination information. Access the document from your Inbox and click the **Edit** link which opens access to change the following fields:

building campus	other location
building room	user-group code

Be sure to click the **'Save'** link to save your changes.

Document	Action	Status	Arrival Date	Summary	Account	Total	Creator	Create Date	Quick Action
TDPABN800121	Approve	In Proc Rt	01/27/2009	TEST ICON	*see doc*	\$0.00	Bodiford, Edward	01/27/2009	
TDPABN800109	FYI	Final	11/14/2008	TRANSFER	*see doc*	\$0.00	Nolen, Gregory E	11/13/2008	
TDPABN800097	Ntfy/Signed	In Proc Rt	11/17/2008	ASSET TRANSFER	*see doc*	\$0.00	Bodiford, Edward	11/17/2008	
TDPABN800121	Ntfy/Signed	In Proc Rt	01/27/2009	TEST ICON	*see doc*	\$0.00	Bodiford, Edward	01/27/2009	
TDPABN800097	Approve	In Proc Rt	11/17/2008	ASSET TRANSFER	*see doc*	\$0.00	Bodiford, Edward	11/17/2008	
TDPABN800076	Ntfy/Signed	In Proc Rt	11/17/2008	TRANSFER ASSETS TO SURPLUS	*see doc*	\$0.00	Bodiford, Edward	11/17/2008	
TDPBBN800029	FYI	Final	10/29/2008	TET	*see doc*	\$0.00	Nolen, Gregory E	10/29/2008	
TDPBBN800026	FYI	Final	10/29/2008	TEST	*see doc*	\$0.00	Nolen, Gregory E	10/29/2008	
TDPBBN800025	FYI	Final	10/29/2008	NEW ATTEMPT	*see doc*	\$0.00	Nolen, Gregory E	10/29/2008	
TDPABN800044	FYI	In Proc Rt	07/21/2008	TRANSFER DOCUMENT TEST	*see doc*	\$0.00	Delzer, Gary E	07/21/2008	
TDPBBN800028	Approve	In Proc Rt	10/29/2008	WTE	*see doc*	\$0.00	Nolen, Gregory E	10/29/2008	

The green truck icon indicates that the transfer has assets that require pick-up by the Surplus Department.

Once the document is routing, no transactions can be done on the asset(s) until routing is completed or the document is canceled.

(TECH NOTE: TA-IN-ROUTE-FG is set for each asset on the document)

An FYI notification is sent to the Source Property Processing Office when the document is posted.