

INTRA-Member Transfers (TDP Documents Within a Member)

The first step is creating the transfer document with header information.

1. Create the INTRA-Member TDP 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 **Destination Department** and, optionally, a **Sub-Department**
- Click on the Search 'Light bulbs' to select assets or type in the Asset Number(s)
- Click on "Create Document" button to activate the Transfer Document Tab

The screenshot shows the 'Canopy' system interface for creating a property transfer document. The page title is 'Property Transfer Create'. The form includes the following fields and sections:

- Doc ID:** **NEW**
- Transaction Description:** [Text input field]
- Source Department:** [Text input field]
- Source Sub Department:** [Text input field]
- Destination Department:** [Text input field]
- Destination Sub Department:** [Text input field]
- Transfer Out of Campus:** [checkbox] [dropdown]
- Asset Selection Table:** A table with two columns: 'Asset Number/Description' and 'Asset Number/Description'. It contains 26 rows, each with a checkbox and a text input field. A search bar above the table contains 'Asset Nbr' and 'Serial Nbr' with lightbulb icons.
- Surplus Property Entry:** **Transportation Method:** [dropdown menu]
- Create Document:** A green button at the bottom of the form.

Red arrows in the image point to the 'Property Transfer Create' title, the search icons, and the 'Create Document' button.

Transfer Departmental Property (cont'd)

2. Edit the INTRA-Member 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. 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

- 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

Canopy
The Texas A&M University System

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

Main Menu > FFX > Transfer > Transfer Document

INFO: Transfer Property Document N800099 has been successfully added

Transfer Search Transfer Document Create Transfer

Document Number: N800099 Action: Select an action... Submit

Property Transfer Request

Document FY: 2008
Document Id: N800099 (TDP Report) Status: In Process (IP)
Route Document Id: Route Status:
Transaction Description: EQUIPMENT TRANSFER
Source Department: MISP Source Sub Department:
Destination Department: CHEM Destination Sub Department:
Transaction Reference: N800099 Transaction Reference 2: N800099
Destination Campus:
Created Date: 11/04/2008 Created By: WALSH, DIANE L
Last Update Date: Last Updated By:

Edit

Destination Information												
Item	NI	Asset	Description	Bldg	Campus	Bldg Number	Room	Other Location	Group Code	Amount		
1		0000002558	PRINTER - HP2100 XI WITH MEMORY UPG	AB						\$738.00	Edit Delete	
2		0000004897	BOOKS METRO LIBRARY REFERENCE	AB						\$1.00	Edit Delete	
										Total:	\$739.00	

Add Asset

FYIs to Destination Recipients
No records found to display.

Add FYI

Transfer Notes
There are no transfer notes for this document.

Add Notes

Canopy, a Business Computing Services application.
The Texas A&M University System
Version: 10/14/2008 1:04:28 PM Debug Info Site Management

Top of Page

Theme: Neon Blue Set Theme Turn Paging Off System - Site Map

Transfer Departmental Property (cont'd)

3. Route the INTRA-Member TDP Document

TDP documents are created and submitted to routing by the Source Department. When the Source Department Signer approves the TDP, it routes to the Destination Department for approval. A specific TDP path can be set up at the Departmental level to route all TDP forms separately.

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

The screenshot shows the Canopy system interface for a Property Transfer Request. The document details are as follows:

Document FY:	2009	Status:	Closed (CL)
Document ID:	N900013 (TDP Report)	Route Status:	In Proc Rt (PR)
Route Document ID:	TDP SAN900013 (Routing Document Report)		
Transaction Description:	TFR TO SRPL	Source Sub Department:	
Source Department:	MISP	Destination Sub Department:	
Destination Department:	SRPL	Transaction Reference 2:	N900013
Transaction Reference:	N900013		
Destination Campus:			
Created Date:	12/17/2008	Created By:	PETTY, SUSAN M
Last Update Date:	12/17/2008	Last Updated By:	PETTY, SUSAN M
Attachments:			

Below the details is the **Surplus Property Entry** section with a checkbox for "Hard drive requirements have been met" and an **Edit** button. A red arrow points to the **Edit** button.

Item	NI	Asset	Description	Bldg Campus	Bldg Number	Room	Other Location	Group Code	Drive Cond	Amount
1		0900000010	COMPUTER,DELL OPTIPLEX,P4, 1.8GHZ	AM	00957	WHS			NO HARD DISK DRIVE	\$70,000.00
Total:										\$70,000.00

Below the table is the **FYIs to Destination Recipients** section with the message "No records found to display." and a **Transfer Notes** section.

- When routing, the TDP follows the default path unless there is a specific path for the TDP form. In that case, it follows the TDP path.
- When the Source Department Signer has approved the TDP, the document routes to the Destination Department.
- If applicable, Executive Level routing will be done after Departments have given approval.
- All TDP documents advance to the Property Processing Office. Within the Property Office, the document follows either the default path or an Auto-Approval path.
- With final approval in the Property Processing Office, routing is complete and the transfer is posted to FAMIS Fixed Assets. The transaction can be seen on the FFX transaction page in CANOPY or on Screen 523 in FFX.
- As an Approver, you must use CANOPY to make edits to the TDP document. However, Screen 910 in FRS can be used to approve TDP documents without making changes.