

FABweb Batch Uploads—Transfers

Use these steps to complete equipment transfers to other University units through a Batch Upload file.

NOTE: Parent/Child fixed assets are **only** transferable directly in **FABweb**. They cannot be transferred using the Batch Upload process.

Step	Task
1.	Go to the OBFS Equipment Management > Forms > website: http://www.obfs.uillinois.edu/forms/equipment-management-surplus/
2.	Click the Transfers link to download the template (Excel format).
3.	Place your cursor in cell A2 to begin entering transfer data. Each asset should have its own row. NOTE: The header row is required in its original format and should not be edited.
4.	Enter data in these required columns for each transfer: <ul style="list-style-type: none"> • TransNum • ChartFrom (non-Banner items only) • OrgFrom (non-Banner items only) • PTag (Banner items only) • ChartTo • OrgTo • Serial Nbr (non-Banner items only) • Description (non-Banner items only) NOTE: See the FABweb Batch Uploads File Requirements for examples and more information.
5.	Select File and click Save As .
6.	Choose a location to save your file.
7.	In the Save as type list, select <i>CSV (Comma delimited)</i> . NOTE: On a Mac, select <i>Windows Comma Separated</i> instead.
8.	In the File name field, use this naming convention (required): <i>T_MMDDYYYY_XXX.csv</i> <i>MM</i> = 2-digit month <i>DD</i> = 2-digit day <i>YYYY</i> = 4-digit year <i>XXX</i> = any 1-3 digit combination
9.	Click the Save button.
10.	If a pop-up window appears to confirm saving your file in CSV format, click the Yes button.
11.	Login to FABweb at https://apps.obfs.uillinois.edu/fixedassets/index.cfm .
12.	Click Process a transfer .
13.	Click the Browse button under Upload a File .
14.	Locate and select the file you saved in step 8.
15.	Click the Open button.
16.	In the Asset File field, confirm that the file name is correct and the file type is CSV.

Step	Task
17.	Click the Upload button. NOTE: A message displays: <i>“Your file has been uploaded. You will receive an email once processing is complete.”</i>
18.	Review the email thoroughly when you get it. It will summarize the status of all the transfers processed. This will be the only communication sent about the status. NOTE: If any transfers failed to process, the email will have a spreadsheet attached, with details about the error(s). The error report might contain multiple tabs.
19.	Correct any processing errors, if needed. Check the FABweb Batch Uploads - Common Entry Errors job aid for help.
20.	Review the transfer request in FABweb for completeness and accuracy.
21.	Click the Forward Transfer tab.
22.	Click the Submit button to forward the transfer request for approval.