

## Processing a Transfer

Use these steps to process an interdepartmental transfer in **FABweb**.

**NOTE:** You can process both **Banner** and non-**Banner** assets on the same form.

### Originating Unit – Department Representative

Step	Task
1.	Login to <b>FABweb</b> at <a href="https://fabweb.uillinois.edu/">https://fabweb.uillinois.edu/</a> .
2.	Click <b>Process a transfer</b> to go to the <b>Find a Record To Transfer</b> screen.
3.	Add active <b>Banner</b> assets, if any. If there are no <b>Banner</b> assets, skip to step 7.
4.	Type the active 9-digit PTag number in the <b>PTag</b> field.
5.	Click the <b>Add a Banner Asset</b> button. <b>NOTE:</b> The asset appears at the bottom of the screen.
6.	Repeat steps 4-5 until all active PTags are entered.
7.	Add non- <b>Banner</b> assets, if any. If there are no non- <b>Banner</b> assets, skip to step 12.
8.	Type the serial number or non-active PTag number in the <b>Serial Number</b> field. <b>NOTE:</b> Type <i>N/A</i> for furniture.
9.	Type a description of the asset in the <b>Description</b> field.
10.	Click the <b>Add a Non-Banner Asset</b> button. <b>NOTE:</b> The asset appears at the bottom of the screen.
11.	Repeat steps 8-10 until all non- <b>Banner</b> assets are entered.
12.	Note the transfer ID at the top of the <b>Transfer Summary</b> tab.
13.	In the <b>New Organization Info</b> column, enter the new responsible <b>COA</b> and six-digit <b>Org</b> .
14.	Click the <b>Refresh</b> (green arrows) button.
15.	Scroll down to the <b>Assets to be transferred</b> section.
16.	Delete the item's Location code from the <b>Location</b> field.
17.	Click the <b>Refresh</b> (green arrows) button.
18.	Click the <b>Forward Transfer</b> tab at the top of the screen.
19.	Verify that the <b>Contact Person</b> , <b>Phone</b> , and <b>E-mail</b> fields are correct.
20.	Enter comments, if any.
21.	Click the <b>Save to Excel</b> to button. Save a copy for your records. <b>NOTE:</b> Send a copy of the Excel file to the Receiving Unit Department Representative in preparation for the upcoming transfer.
22.	Click the <b>Submit</b> button. This forwards the transfer request to the Originating Unit Department Approver(s). <b>NOTE:</b> <b>FABweb</b> will send e-mail notification to the Originating Unit Department Approver(s).

### Originating Unit – Department Approver

Step	Task
1.	Login to <b>FABweb</b> at <a href="https://fabweb.uillinois.edu/">https://fabweb.uillinois.edu/</a> or click the link in your notification e-mail.
2.	Claim the transfer from the <b>Unclaimed Transfer/Surplus/Disposals</b> queue by clicking the TR number. <b>NOTE:</b> The transfer will move to the <b>Transfers/Surplus/Disposals that I am working on</b> queue after you claim it.
3.	Click the transfer in the <b>Transfers/Surplus/Disposals that I am working on</b> queue.
4.	Verify the information on the <b>Transfer Summary</b> tab.
5.	Click the <b>Forward Transfer</b> tab at the top of the screen.
6.	Verify that the <b>Contact Person, Phone, and E-mail</b> fields are correct.
7.	Enter comments, if any.
8.	Approve or decline the transfer: <ol style="list-style-type: none"> <li>To <i>approve</i> the transfer, click the <b>Approve</b> button. This forwards the transfer request to the Receiving Unit Department Approver.  <b>NOTE:</b> <b>FABweb</b> will send e-mail notification to the Receiving Unit Department Approver(s).</li> <li>To <i>decline</i> the transfer, click the <b>Decline Transfer</b> button. This sends the transfer back to the Originating Unit Department Representative.  <b>NOTE:</b> <b>FABweb</b> will send e-mail notification to the Originating Unit Department Representative.</li> </ol>

### Receiving Unit – Department Approver

Step	Task
1.	Login to <b>FABweb</b> at <a href="https://fabweb.uillinois.edu/">https://fabweb.uillinois.edu/</a> or click the link in your notification e-mail.
2.	Click the transfer in the <b>Transfers/Surplus/Disposals that I am working on</b> queue.
3.	Verify the information on the <b>Transfer Summary</b> tab.
4.	Click the <b>Forward Transfer</b> tab at the top of the screen.
5.	Verify that the <b>Contact Person, Phone, and E-mail</b> fields are correct.
6.	Select a Receiving Unit Department Representative to receive the transfer request in the <b>Forward To:</b> field. <b>NOTE:</b> This is the person in the receiving unit who will finalize the transfer by updating the Location code and sending the transfer to <b>Banner</b> .
7.	Enter comments, if any.

Step	Task
8.	<p>Approve or decline the transfer:</p> <p>a. To approve the transfer, click the <b>Approve</b> button. This forwards the transfer request to the Receiving Unit Department Representative indicated in step 6.  <b>NOTE: FABweb</b> will send e-mail notification to the Receiving Unit Department Representative.</p> <p>b. To decline the transfer, click the <b>Decline Transfer</b> button. This sends the transfer back to the Originating Unit Department Representative.  <b>NOTE: FABweb</b> will send e-mail notification to the Originating Unit Department Representative.</p>

### Receiving Unit – Department Representative

Step	Task
1.	Log in to <b>FABweb</b> at <a href="https://fabweb.uillinois.edu/">https://fabweb.uillinois.edu/</a> or click the link in your notification e-mail.
2.	Click the transfer in the <b>Transfers/Surplus/Disposals that I am working on</b> queue.
3.	Verify the information on the <b>Transfer Summary</b> tab.
4.	Enter a Location code in the <b>Location</b> field for each asset.
5.	Click the <b>Refresh</b> (green arrows) button.
6.	Click the <b>Forward Transfer</b> tab at the top of the screen.
7.	Verify that the <b>Contact Person, Phone, and E-mail</b> fields are correct.
8.	Enter comments, if any.
9.	<p>Approve or decline the transfer:</p> <p>a. To approve the transfer, click the <b>Submit to Banner</b> button. The record will update in <b>Banner</b>.  <b>NOTE:</b> You should wait until your department has physically received the transferred item(s) to submit the transfer to <b>Banner</b>. This might take several weeks. After you submit the transfer, send e-mail to the Originating Unit Department Representative to inform them that the process is complete.</p> <p>b. To decline the transfer, click the <b>Decline Transfer</b> button. This sends the transfer back to the Originating Unit Department Representative.  <b>NOTE: FABweb</b> will send e-mail notification to the Originating Unit Department Representative.</p>