

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

Originating Unit – Department Approver

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

Receiving Unit – Department Approver

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

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

Receiving Unit – Department Representative

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