

Transfer Departmental Property Online Via Canopy

Access Canopy at <https://canopy.tamus.edu>

Go to Canopy Production

- Enter FAMIS User ID and Password.
- Select FFX Menu.
- Select Transfer.
- Select Create Transfer.

Select Campus & Set it if not already on correct campus.

Transfer of Assets Within Agency

- Creator enters a Transaction Description (such as Transfer to DS10/171).
- Enter Source Department (such as DS 10).
- Enter Source Sub Department (such as 171).
- Enter Destination Department (such as DS05).
- Enter Destination Sub Department (such as 203).
- Enter asset number or use asset search function.
- Click “Create Document” and you should see a blue box come up with INFO: Transfer Property Document Nxxxxxxx has been successfully added.

Route for Approval and Submit

- Select appropriate action from “Action” drop down:
 - CLOSE - Close document to be finished later.
 - ROUTE - For approval.
 - ROUTE with Extra Action – Send FYI or FYA copies when routed.
 - CANCEL – Cancels document and releases asset(s).
- Click “Submit” to complete Action.

Please note that once you select the appropriate action from the “Action” drop down box that the system is processing this action. Wait a couple of seconds and then click “Submit”. If not, then your action will not be processed if both are done at the same time

Successfully Routed

Blue “INFO” line will read – Record(s) Successfully Routed (Document #).

Document now has to be approved by Signer within the Source department.
-This cannot be the same person who created the document.

Approval by Destination Department

- Destination Department Signer receives notification of document in their inbox.
- Review document and input correct location information: Use EDIT feature for each asset. Enter location information and click “Save”.
- Select appropriate action from “Action” drop down:
 - CLOSE - Close document to be finished later.
 - ROUTE - For approval.
 - ROUTE with Extra Action – Send FYI or FYA copies when routed
 - CANCEL – Cancels document and releases asset(s).

Successfully Routed

Blue “INFO” line will read – Record(s) Successfully Routed (Document #).

Property Office Review and Final Approval

The Texas A&M AgriLife Office of Property and Fleet Management receives notification of document in their inbox. Review for authorized signatures, and that computer hard drive requirements and status of drive condition have been met, when appropriate.

The AgriLife Office of Property and Fleet Management rejects online transfers to Department for correction or approvals if needed.

Transfers automatically post to FAMIS FFX.

FYI Notification is sent to Source Dept Creator with status of Notify/Final.

Transfer of Computers and Hard Drive Status

Any and all computers that are transferred to TAMU Surplus Property, a Political Subdivision (County Government), School District, or Approved Assistance Organization must have the Hard Drive removed from them before the transfer will be approved. The Hard Drive condition must be confirmed on the Online Transfer Document (TDP) or an AG-312 Inventory Software Removal Certification form.

Transfer to another Department within AgriLife Research, AgriLife Extension Service & TVMDL

- a) The Releasing department completes the online departmental transfer in Canopy. The Releasing department enters their department code as the Source department, and the department code to which the item is being transferred to as the Destination department.
- b) The Releasing department also certifies that the Hard Drive requirements have been met for any and all computers that are being transferred. The online transfer document is completed and routed for approval.
- c) When the Destination department receives notice in their Inbox, they are to update the building, room number, group code (if applicable) and other location information by clicking the word EDIT in red on the right hand side of each line item.
- d) The Destination department then routes the online transfer for approval which is to be approved by the Texas A&M AgriLife Property Office.
- e) Asset number(s), acquisition date, class code and money amount will stay the same for both the Releasing and Receiving departments.

Transfer to another Agency in the Texas A&M University System

- a) The Releasing department completes the online departmental transfer in Canopy. The Releasing department enters their department code as the Source department, and the department code to which the item being transferred to as the Destination department.
- b) The Releasing department also certifies that the Hard Drive requirements have been met for any and all computers that are being transferred. The online transfer document is completed and routed for approval.
- c) The document is routed to the Releasing agency's property office. Once approved it will route for approval to the Destination department. The Destination department will then update the building, room number, group code (if applicable) and the other location fields. Also, the Destination department must list an asset number in the Transfer Notes to indicate the new asset number for their agency.
- d) The online transfer document is routed for approval to their agency property office. Once approved the transfer document is returned to the Releasing agency's property office to obtain the Director's approval. Then it is routed for acceptance by the Destination's property office to be added to their inventory.

Transfers to TAMU Surplus Property

- a) If a computer is to be transferred to TAMU Surplus Property, the Hard Drive must be removed.
- b) Counties must contact their District Office Manager to have them create an Online Transfer Document (TDP) for any items they wish to be transferred to TAMU Surplus Property.
- c) In Canopy, the Source department will create an Online Transfer Document (TDP) to transfer the item(s). The CREATOR must select REMOVED under the drop down menu for DRIVE COND for all computers transferred by selecting the word EDIT in red at the right hand side of each line item.
- d) The CREATOR will need to add a "Transfer Note" stating "Hard Drive(s) have been Removed/Cannibalized" and place a check in the box stating the "Hard Drive requirements have been met" located in the middle of the page on the left hand side.
- e) Any Hard Drives that need to be shredded can be placed on an Online Transfer Document (TDP) as a Non-Inventory item and transferred to TAMU Surplus Property. The Description needs to read as "# (Number) of Hard Drives to be shredded." If you must physically watch the hard drives be shredded, they must still be transferred to TAMU Surplus Property on an Online Transfer Document (TDP) but you will also have to fill out an E-Scrap Disposal Form available at the TAMU Surplus Property office.
- f) If a department needs to have the TAMU Surplus Property Office pick up their items, they will need to select SURPLUS PICK UP under the Transportation Method at the bottom of the document, and fill in the necessary information.
- g) The Property Office will then route the Online Transfer Document (TDP) to TAMU Surplus Property. There will be an FYI Copy of the approved online transfer document sent to the Creator. This FYI Copy must be printed and taken with the items to TAMU Surplus Property, and signed by one of their representatives. The department needs to keep this signed copy of the transfer on file in case there is an issue with getting the Online Transfer approved.
- h) Once the Online Transfer Document (TDP) is approved by TAMU Surplus Property, it is routed back to the Texas A&M AgriLife Property Office. The Online Transfer Document (TDP) will be approved, printed off and used as a Deletion Form (in place of an AG-302 Inventory Deletion Request form). The Property Office will then place the asset(s) in a Disposed (deleted) status in FAMIS and they will be removed from TAMU Surplus's inventory.
- i) If an off-campus department is using an AG-301 Property Transfer form, they will also need to submit an AG-312 Inventory Software Removal Certification form and mark each computer asset as having "No Hard Disk Drive". These signed forms will need to be mailed or emailed to their District Office Manager for proper processing before the asset(s) have been delivered to TAMU Surplus Property.

Online Transfer Reminders

Only those individuals with FAMIS access can be a Creator or Approver.

If you deliver the items yourself to A&M Surplus, print a copy of the online transfer form to go with the equipment. **Make sure Surplus checks the equipment off and gives you back a signed copy.** Just like the old paper copy transfers (AG-301), if something doesn't get approved and taken off of your inventory then you have a dated/signed copy showing you took the equipment and Surplus did receive it.

Online transfer documents will remain open until the end of the fiscal year (August 31st), at that time any online transfers that have not been completed will be canceled and will no longer be available in Canopy. If you have on-line transfers that will not be completed prior to August 31st, then you will need to make copies of your online transfers so that they can be entered again when the new fiscal year business is open.

Online transfer resources if needed:

Office of Property & Fleet Management

Jared Kotch

979-845-4791

jared.kotch@ag.tamu.edu

FAMIS Training & Security

Mary Castoria

979-845-4794

mary.castoria@ag.tamu.edu

Sharon Gillespie

979-845-6473

skgillespie@ag.tamu.edu