

## **Step by Step On-Line Transfers in Canopy**

Access Canopy at <http://www.tamus.edu/offices/famis/bcscanopy>

### **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 Nxxxxx 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 in-box.

Review document and input correct location information:

Use EDIT feature for each asset.

Enter location information.

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**

AgriLife Property Office receives notification of document in their in-box.

Review for authorized signatures, and that computer hard drive requirements and status of drive condition have been met, when appropriate.

AgriLife Property Office rejects on-line 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 Active Computers to Surplus**

Enter a Transaction Description (such as Transfer to Surplus).

Enter Source Department (such as DS 10).

Enter Source Sub Department (such as 171).

Enter Destination Department (such as SRPL).

Enter asset number or use asset search function.

Select transportation method from drop down box at the bottom of page.

Additional information is needed when transferring computer equipment.

**\*\*Please note system will not allow routing until the hard drive requirements and condition are entered\*\***

Check box indicating the hard drive requirements have been met, replaces the FDP-411B form and AG-312 form for all computers listed on the transfer document.

Drop down box to designate the hard drive condition for individual computers.

On-line transfer may not be routed without these two fields completed for computers.

### **Hard Drive Requirements**

Click "Edit" button .

Check box to certify.

Click "Save".

### **Drive Condition Options**

For each computer listed on the transfer

Click “Edit”.

Must have the appropriate Drive Condition selected:

- a. Erased.
- b. Not Working.
- c. Removed – Do not use w/active useable computers.
- d. Do Not Erase – Use only when new computer or data/software is needed by the destination department.

Click “Save”.

**\*\*Surplus will not accept computers that have not met one of the first three conditions listed above\*\***

### **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 #).

### **Property Office Review and Approval**

AgriLife Property Office receives notification of document in their in-box.

Review for authorized signatures, and that computer hard drive requirements and status of drive condition have been met.

AgriLife Property Office rejects on-line transfers to Department for correction or approvals if needed.

If Source department selected “Departmental Drop Off”, once approved, notification will be sent to Source departments inbox stating items can now be delivered.

### **Approval by Destination Surplus Department**

Destination Department Signer receives notification of document in their in-box.

Review document.

Approve on-line transfer document.

### **Property Office Final Approval**

AgriLife Property Office receives notification of document in their in-box.

Review for authorized signatures.

Transfers automatically post to FAMIS FFX.

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

## **Transfer of Non-Inventory Computers to Surplus**

Enter a Transaction Description (such as Transfer to Surplus).

Enter Source Department (such as DS 10).

Enter Source Sub Department (such as 171).

Enter Destination Department (such as SRPL).

Check “NI” box. - NI computer: non-inventory computer or server that has a purchase cost of less than the current threshold amount or has already been deleted from inventory. Surplus will reject transfers of NI computers that do not have the condition of the hard drive.

In the asset field, enter asset # if available, description, serial number, if available and either cannibalized (hard drive removed) or erased. Or you may use the “transfer notes” section of the form stating the computer has been irreversibly erased of all software and data contained on the hard disk drive or hard drive has been removed.

Select transportation method from drop down box at the bottom of page.

### **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 “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 #)

### **Property Office Review and Approval**

AgriLife Property Office receives notification of document in their in-box.

Review for authorized signatures, and that computer hard drive requirements and status of drive condition have been met.

AgriLife Property Office rejects on-line transfers to Department for correction or approvals if needed.

If Source department selected "Departmental Drop Off, once approved, notification will be sent to Source departments inbox stating items can now be delivered.

### **Approval by Destination Surplus Department**

Destination Department Signer receives notification of document in their in-box.

Review document.

Approve on-line transfer document.

### **Property Office Final Approval**

AgriLife Property Office receives notification of document in their in-box.

Review for authorized signatures.

Transfers automatically post to FAMIS FFX.

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



## **Non-Inventory Transfers (other than computers) to Surplus**

Enter a Transaction Description (such as Transfer to Surplus).

Enter Source Department (such as DS 10).

Enter Source Sub Department (such as 171).

Enter Destination Department (such as SRPL).

Check box labeled “NI”.

Enter description – Example, Chair, file cabinet, etc. If there is an asset # on the equipment, list that also.

Select transportation method from drop down box at the bottom of page.

Click “Create Document” at bottom of page.

### **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 #).

## **Property Office Review and Approval**

AgriLife Property Office receives notification of document in their in-box.

Review for authorized signatures

AgriLife Property Office rejects on-line transfers to Department for correction or approvals if needed.

If Source department selected “Departmental Drop Off, once approved, notification will be sent to Source departments inbox stating items can now be delivered.

## **Approval by Destination Surplus Department**

Destination Department Signer receives notification of document in their in-box.

Review document.

Approve on-line transfer document.

## **Property Office Final Approval**

AgriLife Property Office receives notification of document in their in-box.

Review for authorized signatures-

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

**\*\*Please note all on-line transfers go through routing and approvals, but non-inventory assets do not post\*\***

## **Transfer of Active Cannibalized Asset(s) to Surplus**

Fill out the AG-302 (Inventory Deletion Request) form and scan/mail to AgriLife Property Office, or you can attach to on-line transfer.

Enter a Transaction Description (such as Transfer to Surplus).

Enter Source Department (such as DS 10).

Enter Source Sub Department (such as 171).

Enter Destination Department (such as SRPL).

Under the Destination Information field, check NI box. Then in the asset/description field, enter the asset number/description/cannibalized in the asset/description field. Example, 0000125796/computer/cannibalized.

You must check NI, otherwise the asset is locked to be processed as a transfer and it cannot be cannibalized.

Select transportation method from drop down box at the bottom of page.

A copy of the AG-302 (Inventory Deletion Request) form along with a copy of the on-line transfer document, goes with the equipment when delivered to, or picked up by movers to be taken to surplus, unless the deletion has been “attached” to the transfer when created.

Click “Create Document” at bottom of page.

## **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 “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 #).

### **Property Office Review**

AgriLife Property Office receives notification of document in their in-box.

Review for authorized signatures, and that computer hard drive requirements and status of drive condition have been met, when appropriate.

AgriLife Property Office rejects on-line transfers to Department for correction or approvals if needed.

If Source department selected “Departmental Drop Off, once approved, notification will be sent to Source departments inbox stating items can now be delivered.

### **Approval by Destination Surplus Department**

Destination Department Signer receives notification of document in their in-box.

Review document.

Approve on-line transfer document.

### **Property Office Final Approval**

AgriLife Property Office receives notification of document in their in-box.

Review for authorized signatures:-

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

**\*\*Please note on-line transfer goes through routing and approvals, but non-inventory assets do not post\*\***

## **Transfers Between Agencies**

Enter a Transaction Description

Enter Source Department

Enter Destination Department

Choose the campus you are transferring to from the Destination Campus field.  
This is a drop down box for you to choose the campus code.

Put in the asset(s) you are transferring.

Click “Create Document” at bottom of page.

## **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 “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 #).

## **Approval by Destination Department**

Destination Department Signer receives notification of document in their in-box.

Review document and input correct location information:

Use EDIT feature for each asset.

Enter location information.

Click “Save”.

Until the form is modified for the new asset number, in the Notes section under the Destination Information (where you listed your assets), need to list the new asset number(s). If you are transferring a computer, you also need to tell condition of the hard drive.

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).

### **Property Office Review**

AgriLife Property Office receives notification of document in their in-box if they are the destination departments agency.

Reviewed for authorized signatures, new location filled in, new asset number is there and that computer hard drive requirements and status of drive condition have been met, when appropriate.

AgriLife Property Office rejects on-line transfers to Department for correction or approvals if needed.

AgriLife Property Office will then Approve it and it will be forwarded to the sources agency Property Office for final approval.

## On-Line Transfer Reminders

1. Only those individual with FAMIS access can be a creator or approver.
2. If you deliver the items yourself to A&M Surplus, print a copy of the on-line 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.
4. On campus only – **if the Movers come to pick up the equipment they normally check off the items on the on-line transfer form they bring, make sure they sign & date the on-line transfer form and you make a copy of this form showing they picked up the items to take to Surplus.**
5. **On-line transfer documents will remain open until the end of the fiscal year (August 31<sup>st</sup>), at that time any on-line 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 31<sup>st</sup>, then you will need to make copies of your on-line transfers so that they can be entered again when the new fiscal year business is open.**

On-line transfer resources if needed:

**Property Office**

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