



# Ready to Move

## Facilities Planning and Construction

YOUR GUIDE TO A SMOOTH MOVE

# MOVE/SETUP REQUEST MANUAL



**SOUTH TEXAS  
COLLEGE**

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## Purpose

The purpose of this document is to set forth procedures to submit a move/setup request.

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## Applicability

The online move/setup request can be utilized for the following four (4) types of moves:

- Assets – moving equipment to a different location, not connected with an employee move, e.g., furniture, computer, printer, etc.
- Current Employee – a current employee moving to another location within the same department or transferring to a new department.
- Future Hire – an employee anticipated to be hired by the College. This move request type does not require an A#; however, a position number is needed to complete the request.
- New Employee – an employee beginning employment at the College.

*Please note, a set limit of 15 move/setup requests are scheduled in advance to occur every other Friday.*

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## Process Overview

The move/setup request involves the following key stakeholders:

**1. Client/Proxy**

Initiates process by completing and submitting a move/setup request.

**2. Financial Manager/Proxy**

Provides approval, accepts transfer, updates asset information, and completes the transfer request in Banner Workflow.

**3. Facilities Planning and Construction**

The Space Management Team verifies space for availability, ADA compliance, and determines if additional furniture is required. In addition, the FPC Team will assign and schedule a move/setup date.

**4. Shipping and Receiving**

Provides moving boxes to client and assists with the move.

**5. Facilities Operations and Maintenance**

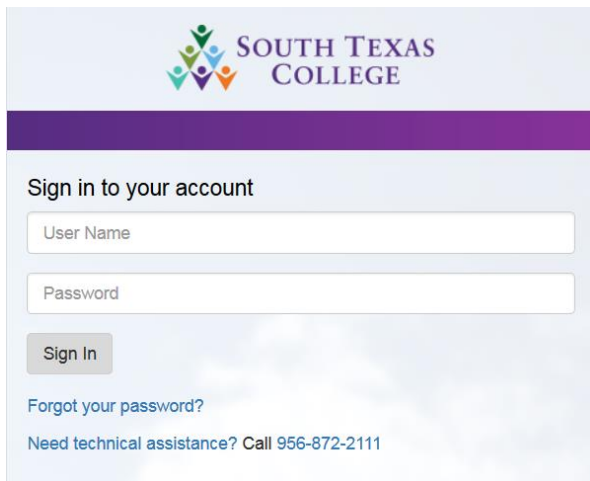
Inspects location to determine if custodial or maintenance services are required and assists with the move.

**6. Information Services and Planning**

Assists with the move by disconnecting, moving, and reconnecting computer and other equipment, e.g. printers, software, TV monitors, etc.

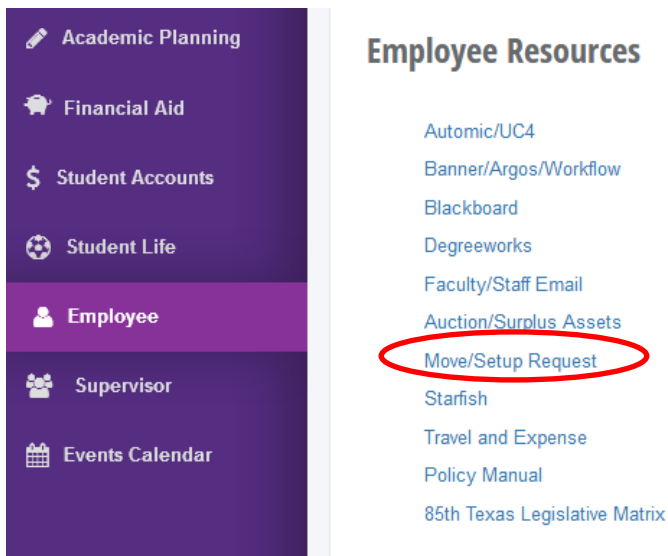
## Section 1: Client Login

**Step 1:** Log in to Jagnet.



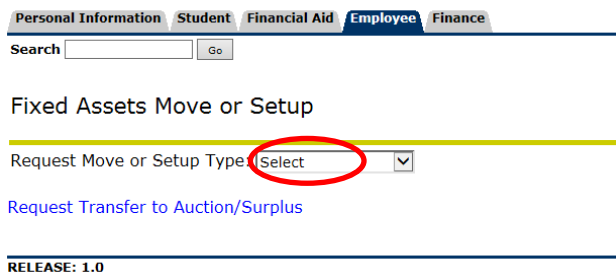
The image shows the South Texas College login page. At the top is the college's logo and name. Below is a purple header bar. The main content area has a light blue background with a white box for login. Inside the box, it says "Sign in to your account". There are two input fields: "User Name" and "Password". Below the fields is a "Sign In" button. At the bottom of the box, there are two links: "Forgot your password?" and "Need technical assistance? Call 956-872-2111".

**Step 2:** Under the Employee section, select *Move/Setup Request*



The image shows the "Employee Resources" page. On the left is a purple sidebar with icons and labels for various services: Academic Planning, Financial Aid, Student Accounts, Student Life, Employee (highlighted), Supervisor, and Events Calendar. On the right, under the "Employee Resources" heading, is a list of links: Automic/UC4, Banner/Argos/Workflow, Blackboard, Degreeworks, Faculty/Staff Email, Auction/Surplus Assets, Move/Setup Request (circled in red), Starfish, Travel and Expense, Policy Manual, and 85th Texas Legislative Matrix.

**Step 3:** Select the type of move or setup request type.



The image shows the "Fixed Assets Move or Setup" page. At the top is a navigation bar with tabs: Personal Information, Student, Financial Aid, Employee (selected), and Finance. Below the tabs is a search bar with a "Go" button. The main content area has a yellow header bar that says "Fixed Assets Move or Setup". Below this is a form with a label "Request Move or Setup Type" and a dropdown menu with "Select" and a downward arrow (circled in red). Below the dropdown is a link "Request Transfer to Auction/Surplus". At the bottom of the page is a footer that says "RELEASE: 1.0".

## SECTION 2A: CURRENT EMPLOYEE

A current employee is an STC employee moving to another location within the same department or transferring to a new department. **\* Please note that if a current employee is transferring to a new department, the employee is classified as a “current” employee for the purpose of the move/set up. \***

The completion of a move/set up request for a current employee includes the steps below. All information must be entered or selected. Failure to provide information will result in an error and the process will not continue until corrected.

**Step 4:** Please refer to page 5 for further instructions in completing the form below.

① Request Move or Setup Type:

② Employee Type:

③ Employee's A# to Move/Setup

④ Justification

⑤ FROM:  
Campus:  Bldg:  Office/Room#:

⑥ TO:  
Campus:  Bldg:  Office/Room#:

⑦ Office and Suite where keys are needed? ☒ Yes ☐ No  
Office/Room#:   
Suite#/Dept:

• (For master, sub-master, and building keys/access cards, contact Maintenance Dept.)  
• Keys will be issued to full-time employees only

⑧ Will Boxes be required? ☒ Yes ☐ No  
How many?   
Need assistance to move boxes? ☒ Yes ☐ No

⑨ Do you need to move/setup technology equipment? ☒ Yes ☐ No

⑩ Do you need to move/setup furniture? ☒ Yes ☐ No

⑪ Financial Manager Requesting

⑫ Voicemail ☒ Yes ☐ No

⑬ Phone Display Name

⑭ Previous Phone#

⑮ New Phone#

⑯ Setup ☒ Yes ☐ No

⑰ Fixed Asset Transfers/Setup ☐ Silver Tag (Includes Furniture)  
☒ Purple, Green, & No Tag (Includes Furniture)

⑱

**Annotations:**

- If Part-Time Staff is selected, the option to request keys will not be available. Keys cannot be issued to part-time employees.
- #9 Refers to computer and phone set up, select “YES” to enter phone and set up information.
- If the “yes” option is selected on fields 9-10, the Financial Manager Requesting drop down box will be inaccessible. This information will be entered on the next screen.

- 1. Request Move or Setup Type:** select *Current Employee*.
- 2. Employee Type:**
  - Full-Time Faculty/Staff
  - If Part-Time Staff is selected, the option to request keys will not be available. Keys cannot be issued to part-time employees.
- 3. Employee's A# to Move/Setup:** enter the A# of the employee moving, *not the person completing the form*.
- 4. Justification:** include a reason for the move and any special instructions (e.g., employee relocating due to position change)
- 5. From Campus/Building/Office:** indicate the current location of the employee.
- 6. To Campus/Building/Office:** indicate the new location the employee is moving to.
- 7. Office and Suite where keys are needed:** indicate *Yes* if keys are required for the new location followed by the *Office/Room #* and *Suite#/Dept.*
- 8. Will Boxes be required?** If *Yes* is selected, enter the number of boxes required and indicate if assistance is needed. Central Receiving and Fixed Assets will provide the client with the requested number of boxes prior to the move date. *Please note that personal items are not permitted to be placed inside the requested boxes. Employees are responsible for moving their own personal items.*
- 9. Move/set up technology equipment:** Select *YES* if computer and phone set up is needed, you must select *YES* to enter phone information, Tag #'s will be entered on the next page. (e.g. moving and setting up a computer, printer, phone, fax, etc.).
- 10. Move/set up furniture:** Select *Yes* if furniture is part of the move and requires setup, Tag #'s will be entered on the next page.
- 11. Financial Manager Requesting:** select the name of the *financial manager* requesting the move. If the "yes" option is selected on fields 9 or 10, the Financial Manager Requesting drop down box will be inaccessible. This information will be entered on the next screen.
- 12. Voicemail:** indicate if voicemail needs to be set up. Voicemail can be set up for part-time employees if requested by the supervisor.
- 13. Phone Display Name:** enter the name to be displayed on the phone. For part-time employees, the phone will display *staff* or the department name.
- 14. Previous Phone #:** enter the employee's previous phone number, if applicable. (Employee transferring from one dept. to another)
- 15. New Phone #:** indicate the extension on the phone or write "NEW" if a new extension is needed. *Please note that if transferring to a different campus, the current phone number cannot be transferred to the new location.*
- 16. Setup:** Select *YES* if setup is needed for computer, printer, act.
- 17. Fixed Asset Transfer/Set up**
  - **Silver Tag:** check the box if silver tag items will be part of the move.
  - **Purple, Green, & No Tag:** check the box if purple/green tag items will be part of the move.
- 18.** When all the information has been entered, click on the *Submit* button.

**Step 5a: Fixed Assets Mass Transfer (Silver Tags) for Organization (dept.), Location, and Custodian**

This form will appear if silver tag items were indicated as part of the move. Include only assets which will be transferred to the same location, organization code, and custodian. If a tag number is entered incorrectly, it will prompt an error message.

1. Move/Setup Request #: this field is automatically populated.
2. Manager Requesting: Select Financial Manager from list.
3. Manager's Phone #: Please use number of requester submitting form for contact reasons.
4. Justification: include a reason for moving the assets and any special instructions. (e.g., employee relocating from Building N to Building M)
5. To Financial Manager: select the name of the financial manager who will maintain ownership of the asset.
6. Tag #s: indicate the silver tag number of the items that will be moving.
7. Click *Submit*.

FA Mass Transfer (Silver Tags ) for Orgn, Locn and Custodian

1 Move/Setup Request# 1718133 Current Employee

2 Manager Requesting Frank Jason Gutierrez - FGUTIERREZ\_3068

3 Managers's Phone# 8723566

4 Justification  
Employee relocating due to position change.  
You have 54 characters left.

5 To Financial Manager Frank Jason Gutierrez - FGUTIERREZ\_3068

6 Tag#s  
20958

7 Submit

RELEASE: 1

### Step 5b: Non Inventory Assets – Purple/Green Tags

This form will appear if purple/green tag items were indicated as part of the move. Please note, only purple/green tag items can be submitted in this form. **Do not include silver tag items on this form.**

1. Move/Setup Request #: is automatically populated.
2. Manager Requesting: Select the Financial Manager from the drop down.
3. Initiator's Phone #: The number of the person submitting the request must be indicated on the form.
4. Justification: include a reason for moving the asset(s), e.g., employee relocating from Building N to Building A. A justification and contact information must be included.
5. To Financial Manager: select the name of the financial manager who will maintain ownership of the asset.
6. From and To Location: indicate the current and new location of the asset(s)
7. Tag #s: indicate the purple tag number of the items that will be moving.
  - If an asset does not have a tag number, indicate N/A for the tag number, provide a serial number (if available), and enter a description.
8. Click *Submit*.

The screenshot shows a web form titled "Non Inventory Assets - Purple/Green Tags". At the top, there are tabs for "Personal Information", "Student", "Financial Aid", "Employee", and "Finance", with "Employee" selected. Below the tabs is a search bar with "Search" and "Go" buttons, and a "SITE MAP" link. The form fields are as follows:

- 1. Move/Setup Request#: 1718105 (Equipment Only)
- 2. Manager Requesting: Frank Jason Gutierrez (dropdown)
- 3. Initiator's Phone#: 9568722139
- 4. Justification: Employee relocating due to position change. (text area with a character count: "You have 79 characters left.")
- 5. To Financial Manager: Frank Jason Gutierrez (dropdown)
- 6. From Location: PCN Bldg N Rm 160F (dropdown)
- 6. To Location: PCN Bldg N Rm 160B (dropdown)

Below the form fields is a table with 3 columns: Tag#, Serial#, and Description. The table has 12 rows. The first row is populated with the following data:

Tag#	Serial#	Description
9000048568	FCH14229DCY	CISCO PHONE

At the bottom of the form is a "Submit" button.



## Step 6: Confirmation

1. Select one of the *Submit* options if additional silver or purple tag assets need to be entered. If selected, follow steps 5a or step 5b.
2. If no additional assets need to be submitted, select **\*Done\***. This will conclude the submission of the move/setup request. Proceed to Section 3 for Banner Workflow instructions.

### Confirmation

---

①

[Submit additional Silver Tag Assets](#)

[Submit additional Purple Tag Assets](#)

②

[Done](#)

---

RELEASE: 1

## SECTION 2B: NEW EMPLOYEE

A new employee is an employee beginning employment at South Texas College and has already been assigned an A number.

The completion of a move/set up request for a new employee includes the steps below. All information must be entered or selected. Failure to provide information will result in an error and the process will not continue until corrected.

Follow steps 1-3 from Section 1: *Client Login*.

**Step 4:** Please refer to page 10 for further instructions in completing the form below.

1 Request Move or Setup Type:

2 Employee Type:

3 Employee's A# to Move/Setup

4 Justification

5 TO:  
Campus:  Bldg:  Office/Room#:

6 Office and Suite where keys are needed? ☒ Yes ☐ No  
Office/Room#:   
Suite#/Dept:

• (For master, sub-master, and building keys/access cards, contact Maintenance Dept.)  
• Keys will be issued to full-time employees only

7 Will Boxes be required?  
How many?   
Need assistance to move boxes? ☒ Yes ☐ No

8 Do you need to move/setup technology equipment? ☒ Yes ☐ No

9 Do you need to move/setup furniture? ☒ Yes ☐ No

10 Financial Manager Requesting

11 Voicemail ☒ Yes ☐ No

12 Phone Display Name

13 Previous Phone#

14 New Phone#

15 Setup ☒ Yes ☐ No

16 Fixed Asset Transfers/Setup ☐ Silver Tag (Includes Furniture)  
☒ Purple, Green, & No Tag (Includes Furniture)

17

If Part-Time Staff is selected, the option to request keys will not be available. Keys cannot be issued to part-time employees.

#8 Refers to computer and phone set up, select "YES" to enter phone and set up information.

If the "yes" option is selected on fields 9-10, the *Financial Manager Requesting* drop down box will be inaccessible. This information will be entered on the next screen.

- 1. Request Move or Setup Type:** select *New Employee*.
- 2. Employee Type:**
  - Full-Time Faculty/Staff
  - Part-Time Staff, if selected, the option to request keys will not be available. *Keys cannot be issued to part-time employees.*
- 3. Employee's A# to Move/Set Up:** enter the A# of the new employee, *not the person completing the form.*
- 4. Justification:** include a reason for the move (e.g. employee relocating from Building N to Building A) and contact information.
- 5. To Campus/Building/Office:** indicate the new location the employee is moving to.
- 6. Office and Suite where keys are needed:** if keys are required for the new location indicate *Yes*, followed by the *Office/Room #* and *Suite#/Dept.*
- 7. Will Boxes be required?** If *Yes* is selected, enter the number of required boxes and indicate if assistance is needed. Central Receiving will provide the client with the requested number of boxes prior to the move date. *Please note that personal items are not permitted to be placed inside the requested boxes. Employees are responsible for moving their own personal items.*
- 8. Move/set up technology equipment:** indicate *Yes* if technology equipment is part of the move and requires setup (e.g., moving and setting up a computer, printer, phone, fax, etc.).
- 9. Move/set up furniture:** indicate *Yes* if furniture is part of the move and requires setup.
- 10. Financial Manager Requesting:** select the name of the *financial manager* requesting the move. *If the "yes" option is selected on fields 9-10, the Financial Manager Requesting drop down box will be inaccessible. This information will be entered on the next screen.*
- 11. Voicemail:** indicate if voicemail needs to be set up. Voicemail can be set up for part-time employees if requested by the supervisor.
- 12. Phone Display Name:** enter the name to display on the phone. For part-time employees, the phone will display *staff* or the department name.
- 13. Previous Phone #:** enter the employee's previous phone number or indicate N/A.
- 14. New Phone #:** indicate the employee's new phone number, if available.
- 15.**
- 16. Fixed Asset Transfer/Set up**
  - **Silver Tag:** check the box if silver tag items will be part of the move.
  - **Purple, Green, & No Tag:** check the box if purple/green tag items will be part of the move.
- 17.** When all the information has been entered, click on the *Submit* button.

**Please Refer to Section 2D for instructions on adding assets.**

## SECTION 2C: FUTURE HIRE

A future hire is an employee that the College anticipates hiring. This move request type does not require an A#; however, a position number is needed to complete the request. *Please note, this is a partial setup, upon the issuance of an employee A number, a “new employee” move/setup request type is required to finalize the setup.*

The completion of a move/setup request for a future hire includes the steps below. All information must be entered or selected. Failure to provide information will result in an error and the process will not continue until corrected.

Follow Steps 1-3 from Section 1: *Client Login*.

**Step 4:** Please refer to page 12 for further instructions in completing the form below.

Personal Information Student Financial Aid **Employee** Finance

Search  Go

### Fixed Assets Move or Setup

① Request Move or Setup Type:

② Employee Type:

③ Employee's A# to Move/Setup

④ Justification

⑤ Employee's Position#

⑥ Employee Department

⑦ TO:

Campus:  Bldg:  Office/Room#:

⑧ Will Boxes be required? ☒ Yes ☐ No  
How many?   
Need assistance to move boxes? ☒ Yes ☐ No

⑨ Do you need to move/setup technology equipment? ☒ Yes ☐ No

⑩ Do you need to move/setup furniture? ☒ Yes ☐ No

⑪ Financial Manager Requesting

⑫ Fixed Asset Transfers/Setup ☒ Silver Tag  
☐ Purple, Green, & No Tag (Includes Furniture)

⑬

If the “yes” option is selected on fields 9-10, the *Financial Manager Requesting* drop down box will be inaccessible. This information will be entered on the next screen.

[Request Transfer to Auction/Surplus](#)

- 1. Request Move or Setup Type:** select *Future Hire*.
- 2. Employee Type:**
  - Full-Time Faculty/Staff
  - Part-Time Staff
- 3. Employee's A# to Move/Set Up:** this move request type does not require an A#; however, a position number is needed to complete the request.
- 4. Justification:** Include a reason for the setup (e.g., setup for future hire) and contact information.
- 5. Employee's Position Number:** indicate the position number of the future hire.
- 6. Employee Department:** indicate the department of the future hire.
- 7. To Campus/Building/Office:** indicate the location.
- 8. Will Boxes be required?** If Yes is selected, enter the number of moving boxes wanted and specify if assistance is needed. Central Receiving will provide the client with the requested number of boxes prior to the move/setup date. *Please note that personal items are not permitted to be placed inside the requested boxes. Employees are responsible for moving their own personal items.*
- 9. Move/setup technology equipment:** indicate Yes if technology equipment is part of the move and requires setup (e.g., setting up a computer, printer, phone, fax, etc.)
- 10. Move/setup furniture:** indicate Yes if furniture is part of the move and requires setup.
- 11. Financial Manager Requesting:** select the name of the *financial manager* requesting the move. *If the "yes" option is selected on fields 9-10, the Financial Manager Requesting drop down box will be inaccessible. This information will be entered on the next screen.*
- 12. Fixed Asset Transfer/Set up**
  - **Silver Tag:** check the box if silver tag items will be part of the move.
  - **Purple, Green, & No Tag:** check the box if purple/green tag items will be part of the move.
- 13.** When all the information has been entered, click on the *Submit* button.

**Please Refer to Section 2D for instructions on adding assets.**

## SECTION 2D: ASSET MOVES

The asset only move/setup request solely consists of moving equipment and/or furniture. **An employee is not involved in this type of move.**

The completion of a move/setup request for assets includes the steps below.

Follow steps 1-3 from Section 1: *Client Login*.

**Step 4:** Please refer to page 14 and 15 for further instructions in completing the form below.

1. Request Move or Setup Type: Select *Assets*
2. Fixed Asset Transfers/Setup:
  - **Silver Tag:** check the box if silver tag items will be part of the move.
  - **Purple, Green, & No Tag:** check the box if purple/green tag items will be part of the move.
3. Click on *Submit*.

Personal Information Student Financial Aid **Employee** Finance

Search  Go

Fixed Assets Move or Setup

① Request Move or Setup Type: Assets

② Fixed Asset Transfers/Setup ☒ Silver Tag (Includes Furniture)  
☐ Purple, Green, & No Tag (Includes Furniture)

③

[Request Transfer to Auction/Surplus](#)

RELEASE: 1.0

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### Step 5a: Fixed Assets Mass Transfer (Silver Tags) for Organization, Location, and Custodian

This form will appear if silver tag items were indicated as part of the move. Include only assets which will be transferred to the same location, organization code, and custodian. If a tag number is entered incorrectly, it will prompt an error message.

1. Move/Setup Request #: this field is automatically populated.
2. Manager Requesting: Select name of Financial Manager from drop down.
3. Manager's Phone #: Please provide phone # of person submitting request.
4. Justification: include a reason for moving the assets and any special instructions. (e.g., employee relocating from Building N to Building M, data drop will be needed).
5. To Financial Manager: select the name of the financial manager who will maintain ownership of the asset.
6. Tag #s: indicate the silver tag number of the items that will be moving.
7. Click *Submit*.

The screenshot shows a web form titled "FA Mass Transfer (Silver Tags ) for Orgn, Locn and Custodian". At the top, there are tabs for "Personal Information", "Student", "Financial Aid", "Employee", and "Finance", with "Employee" selected. Below the tabs is a search bar with a "Go" button. The form fields are numbered 1 through 7, corresponding to the instructions in the previous block:

- 1. Move/Setup Request#: 1819117 Assets
- 2. Manager Requesting: Frank Jason Gutierrez - FGUTIERREZ\_3068
- 3. Manangers's Phone#: 3566
- 4. Justification: TEST ASSETS SILVER TAG
- 5. To Financial Manager: Frank Jason Gutierrez - FGUTIERREZ\_3068
- 6. Tag #s: 20958
- 7. Submit

Additional details in the form include a character count "You have 106 characters left." and a note: "\*Please enter in the entire tag number\*" and "\*Including leading zeros if any\*".

### Step 5b: Non Inventory Assets – Purple/Green Tags

This form will appear if purple/green tag items were indicated as part of the move. Please note, only purple/green tag items can be submitted in this form. **Do not include silver tag items on this form.**

1. Move/Setup Request #: is automatically populated.
2. Manager Requesting: select manager from the list.
3. Initiator's Phone #: must be indicated on the form.
4. Justification: include a reason for moving the assets (e.g., relocating assets from Building N to Building A). A justification and contact information must be included.
5. To Financial Manager: select the name of the financial manager who will maintain ownership of the asset.
6. From and To Locations: indicate the current and new location of the asset(s).
7. Tag #s: indicate the purple tag number of the items that will be moving.
  - If an asset does not have a tag number, indicate N/A for the tag number, provide a serial number (if available), and enter a description.
8. Click *Submit*.

Non Inventory Assets - Purple/Green Tags

1 Move/Setup Request# 1819114 Assets

2 Manager Requesting Frank Jason Gutierrez

3 Initiator's Phone# 2139

4 Justification  
Test changes to Asset  
You have 107 characters left.

5 To Financial Manager Frank Jason Gutierrez

6 From Location PCN Bldg N Rm 160B  
To Location PCN Bldg N Rm 160F

7

Tag#	Serial#	Description
9000048568	FCH14229DCY	CISCO PHONE

8 Submit

Move/Set Up Request Manual, revised 10/23/23

Page | 15



## Step 6: Confirmation

1. Select one of the *Submit* options if additional silver or purple tag assets need to be entered. If selected, follow steps 5a or step 5b.
2. If no additional assets need to be submitted, select “Done”. This will conclude the submission of the move/setup request. Proceed to Section 3 for Banner Workflow instructions.

Confirmation

①

Submit additional Silver Tag Assets

Submit additional Purple Tag Assets

②

Done

RELEASE: 1

## Section 3: Banner Workflow

### 3.1 Transfer Approval - Current Financial Manager Approval

#### Worklist

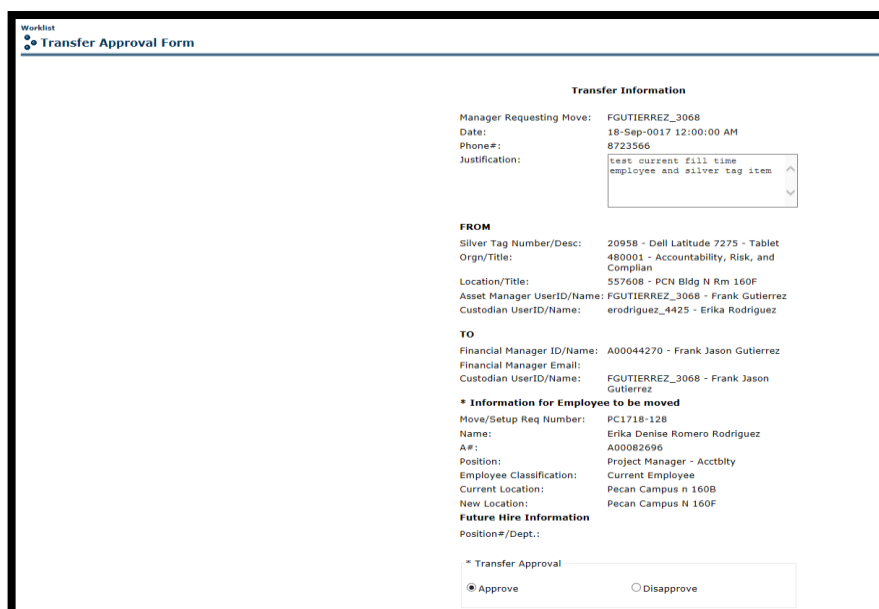
- Following the submission of the move/setup request, the Financial Manager/Proxy will log into Banner Workflow and select the Transfer Approval Form.
  - Go to Banner Workflow: [workflow.southtexascollege.edu](http://workflow.southtexascollege.edu)
  - Login
  - Select worklist



Organization	Workflow	Activity
Root	ERODRIGUEZ 4425 Assets Tag#'s 20958 Move ReqNo: 1819121	TransferApproval

#### Transfer Approval Form

- The form will display a summary of the move/set up request that was submitted by the client.
- The Financial Manager will select *Approve* or *Disapprove* in the transfer approval section.
- If the Financial Manager does not approve the transfer form, a comment is required in the *Disapproval Comments* section before the form can be submitted.
- If the Financial Manager does not approve the form within five days, an alert will be displayed and an email reminder will be sent to the FM.



**Transfer Information**

Manager Requesting Move: FGUTIERREZ\_3068  
Date: 18-Sep-0017 12:00:00 AM  
Phone#: 8723566  
Justification:

**FROM**

Silver Tag Number/Desc: 20958 - Dell Latitude 7275 - Tablet  
Orgn/Title: 480001 - Accountability, Risk, and Complan  
Location/Title: 557608 - PCN Bldg N Rm 160F  
Asset Manager UserID/Name: FGUTIERREZ\_3068 - Frank Gutierrez  
Custodian UserID/Name: erodriguez\_4425 - Erika Rodriguez

**TO**

Financial Manager ID/Name: A00044270 - Frank Jason Gutierrez  
Financial Manager Email: FGUTIERREZ\_3068 - Frank Jason Gutierrez

**\* Information for Employee to be moved**

Move/Setup Req Number: PC1718-128  
Name: Erika Denise Romero Rodriguez  
A#: A00082696  
Position: Project Manager - Acctbity  
Employee Classification: Current Employee  
Current Location: Pecan Campus n 160B  
New Location: Pecan Campus N 160F

**Future Hire Information**

Position#/Dept.:

**\* Transfer Approval**

☒ Approve ☐ Disapprove

## 3.2 Validation Form - Current/New Financial Manager Approval

After approval of the transfer, the Financial Manager receiving the assets will need to complete/approve the Validation Form, Transfer Request Form, and Confirmation Approval Form. **If the FM is the same person transferring and receiving the assets, they will approve all forms.**

### Worklist

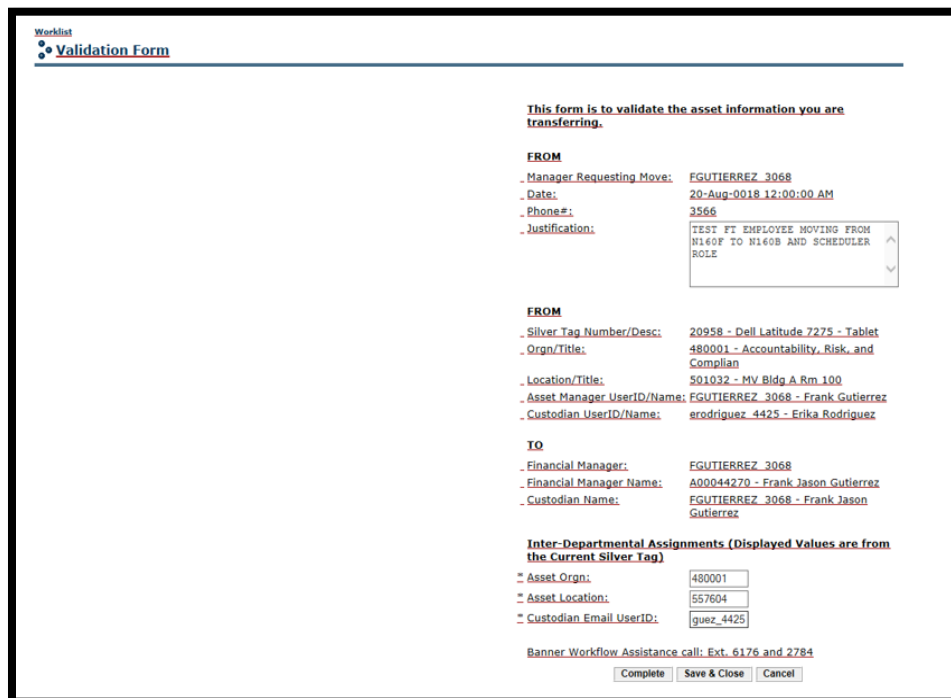
- The Validation Form is used to confirm the information of the assets that are being transferred.
- Select the pending worklist item to view the Validation Form.



The screenshot shows the 'Worklist' tab in a web application. It displays a table with two columns: 'Organization' and 'Workflow'. The 'Organization' column shows 'Root' with a folder icon. The 'Workflow' column shows a link 'ERODRIGUEZ\_4425 Current Employee Assets Tag#'s 20958' with a status 'Ready' below it. At the bottom right, there is a pagination control showing '1 - 1 of 1' and buttons for 'First', 'Previous', 'Next', 'Last', and a 'Go to page:' dropdown set to '1'.

### Validation Form

- The receiving Financial Manager will need to enter the following required fields:
  - Asset Orgn: enter the Banner organization code number.
  - Asset Location: enter the *new* asset location code. A list of codes can be downloaded from the Central Receiving and Fixed Assets webpage, Argos, and JagNet.
  - Custodian Email User ID: enter the custodian's STC email username.



The screenshot shows the 'Validation Form' interface. It contains several sections with pre-filled information:

- FROM**
  - Manager Requesting Move: FGUTIERREZ\_3068
  - Date: 20-Aug-0018 12:00:00 AM
  - Phone#: 3566
  - Justification: TEST FT EMPLOYEE MOVING FROM N160F TO N160B AND SCHEDULER ROLE
- FROM**
  - Silver Tag Number/Desc: 20958 - Dell Latitude 7275 - Tablet
  - Orgn/Title: 480001 - Accountability, Risk, and Complan
  - Location/Title: 501032 - MV Bldg A Rm 100
  - Asset Manager UserID/Name: FGUTIERREZ\_3068 - Frank Gutierrez
  - Custodian UserID/Name: erodriguez\_4425 - Erika Rodriguez
- TO**
  - Financial Manager: FGUTIERREZ\_3068
  - Financial Manager Name: A00044270 - Frank Jason Gutierrez
  - Custodian Name: FGUTIERREZ\_3068 - Frank Jason Gutierrez
- Inter-Departmental Assignments (Displayed Values are from the Current Silver Tag)**
  - Asset Orgn: 480001
  - Asset Location: 557604
  - Custodian Email UserID: guez\_4425

At the bottom, there is a note: 'Banner Workflow Assistance call: Ext. 6176 and 2784' and three buttons: 'Complete', 'Save & Close', and 'Cancel'.

## 3.2(a) Transfer Request Rework Form - Current/New Financial Manager Approval

The Transfer Request Rework Form will only be displayed on the worklist if **an incorrect asset orgn., location code, and/or custodian email user ID was submitted on the Validation Form**. The receiving FM will receive an email notification for the pending Transfer Request Form.

### Worklist

The screenshot shows a 'Worklist' header with a search icon. Below it, there are two tabs: 'Organization' and 'Workflow'. Under 'Organization', there is a tree view with 'Root' selected. Under 'Workflow', there is a single entry: 'ERODRIGUEZ\_4425 Current Employee Assets Tag#'s 20958' with a status of 'Ready'. At the bottom right, there is a pagination bar showing '1 - 1 of 1' and buttons for 'First', 'Previous', 'Next', 'Last', and a 'Go to page:' dropdown set to '1'.

- The receiving FM reviews the information on the Transfer Request Rework Form and selects *Complete*.
- The validation indicators indicate a “No” next to the information that was incorrect.
- Enter the correct information in the Transfer Request Rework Form.
- Click on *Complete* to submit the form.

### Transfer Request Rework Form

The screenshot shows the 'Transfer Request Rework Form' interface. At the top, there is a 'Worklist' header and a 'Transfer Request Rework Form' sub-header. The form is divided into several sections:

- Validation Indicators:** This section has three items, each with a red arrow pointing to it:
  - New Orgn is Valid?: Yes
  - New Locn is Valid?: Yes
  - New Custodian UserID is Valid?: No
- Asset Transfer Information:** This section has a label Asset Tags and Descriptions:: followed by a text area containing '20958 - Dell Latitude 7275 - Tablet'.
- FROM:** This section contains fields for:
  - Manager Requesting Move: FGUTIERREZ\_3068
  - Date: 18-Sep-0017 12:00:00 AM
  - Phone#: 8723566
  - Justification: test current fill time employee and silver tag item
- TO:** This section contains fields for:
  - Financial Manager: FGUTIERREZ\_3068
  - Inter-Departmental Assignments:
  - Orgn: 480001
  - Location: 557608
  - Custodian UserID: erodriguez\_4425

At the bottom right, there are three buttons: 'Complete' (circled in red), 'Save & Close', and 'Cancel'.

### 3.3 Confirmation Approval Form - Current/New Financial Manager

#### Worklist

- An additional pending item will appear on the receiving FM's worklist. Select the link to access the Confirmation Approval Form.

The screenshot shows a web application titled "Worklist". Below the title is a table with two columns: "Organization" and "Workflow". The "Organization" column contains a small icon and the text "Root". The "Workflow" column contains a blue hyperlink: "ERODRIGUEZ 4425 Current Employee Assets Tag#'s 20958". Below the table, the status "Ready" is displayed. At the bottom right, there is a pagination control showing "1 - 1 of 1" and buttons for "First", "Previous", "Next", "Last", and a "Go to page:" dropdown menu set to "1".

#### Confirmation Approval Form

The receiving FM reviews the information on the Confirmation Approval Form and completes the following:

- Shipping & Receiving Assistance: select Yes if assistance is needed with moving boxes, equipment, and/or furniture during the move and NO if updating inventory or FM.
- Transfer Approval
  - If the FM does not approve the transfer, a comment will be required in the *Disapproval Comments* section.
- To submit the approval, the receiving FM will select *Complete*.

The screenshot shows the "Confirmation Approval Form" in a web application. The form is divided into several sections:

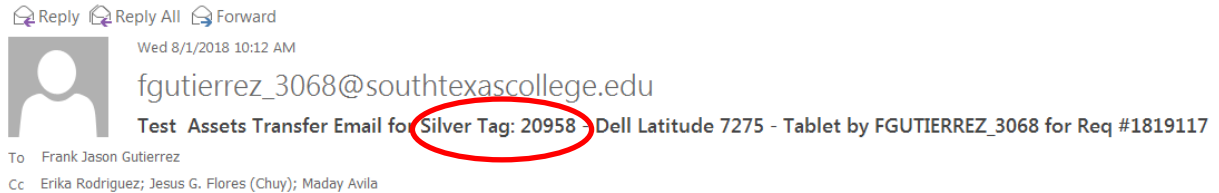
- Asset Transfer Information**
  - FROM**
    - Manager Requesting Move: FGUTIERREZ\_3068
    - Date: 18-Sep-0017 12:00:00 AM
    - Phone#: 8723566
    - Silver Tag Number/Desc: 20958 - Dell Latitude 7275 - Tablet
    - Serial Number: 72TGR72
    - Justification: test current fill time employee and silver tag item
  - TO**
    - Financial Manager ID/Name: A00044270 - Frank Jason Gutierrez
    - Orgn/Title: 480001 - Accountability, Risk, and Compliance
    - Location/Title: 557608 - PCH Bldg N Rm 160F
    - Custodian UserID/Name: erodriguez\_4425 - Erika Rodriguez
  - \* Information for Employee to be moved**
    - Move/Setup Req Number: PC1718-128
    - Name: Erika Denise Romero Rodriguez
    - A#: A00082696
    - Position: Project Manager - Acctblty
    - Employee Classification: Current Employee
    - Current Location: Pecan Campus n 160B
    - New Location: Pecan Campus N 160F
  - Future Hire Information**
    - Position#/Dept.:
- Shipping & Receiving Assistance**
  - Yes (selected) No
- Transfer Approval**
  - Approve (selected) Disapprove
- Disapproval Comments:** (Text area)

At the bottom of the form, there is a footer with the text: "Banner Workflow Assistance call: Ext. 6176 and 2784" and a note: "\* When no employee information is submitted then employee is not displayed on the form". Below this, there are three buttons: "Complete", "Save & Close", and "Cancel". The "Complete" button is circled in red.

## Section 4: Email Notifications

### 4.1 Scheduled Date

Upon approval from Facilities Planning and Construction, an email notification is sent to the client and to the appropriate key stakeholders regarding the scheduled move date. ***Please note, the client will receive separate email notifications for silver and purple assets.***



-----TEST SILVER TAG CONFIRMATION EMAIL-----

This is to notify you that Silver Tag Number(s) and Description(s):

20958 - Dell Latitude 7275 - Tablet

initiated by FGUTIERREZ\_3068 has been approved in Workflow.

Transfer information is as follows:

From: Equipment Manager: FGUTIERREZ\_3068 - Frank Gutierrez

To: Equipment Manager: @New\_Equip\_Manager\_UserID - Frank Jason Gutierrez

Custodian: erodriguez\_4425 - Erika Rodriguez

Orgn: 480001 - Accountability, Risk, and Complian

Location: 557604 - PCN Bldg N Rm 160B


Justification: TEST ASSETS SILVER TAG

Shipping & Receiving Assistance: assist

Move/Setup Information:

Request Number:1819117

Request Type: Assets

Move Schedule Date: 01-AUG-18 



workflow@southtexascollege.edu

Test Current Employee Move/Setup Notification for Req. #1819332 and Non Inventory Assets Transfer for na

To: Erika Rodriguez

Cc: Maday Avila

If there are problems with how this message is displayed, click here to view it in a web browser.

-----MOVE/SETUP TEST EMAIL FOR EMPLOYEE-----

Move Setup Information is as follows:

Work order for Move/setup request number 1819332 for \*Erika Denise Romero Rodriguez scheduled for 25-OCT-18

Employee to be moved Information:

Banner ID: A00082696

Windows username: erodriguez\_4425

Previous Phone: 2139

New Phone: 2139

Voicemail Setup: Yes

Preferred Display Name: Erika

Transfer Files: no

Current Location: Pecan Campus n 160f

New Location: Pecan Campus n 160b

Non Inventory Transfer information is as follows:

Assets Desc: Tag Information

Tag #s	Serial #s	Description
na	na	printer table
na	na	black dell printer
na	na	purple desk chair

End of Information

Assets Justification: test approvals with 3 non-inventory items

Shipping & Receiving Assistance: @assist\_ind

Move/Setup Information:

Request Number: 1819332

Request Type: Current Employee

Employee to be moved: \*Erika Denise Romero Rodriguez

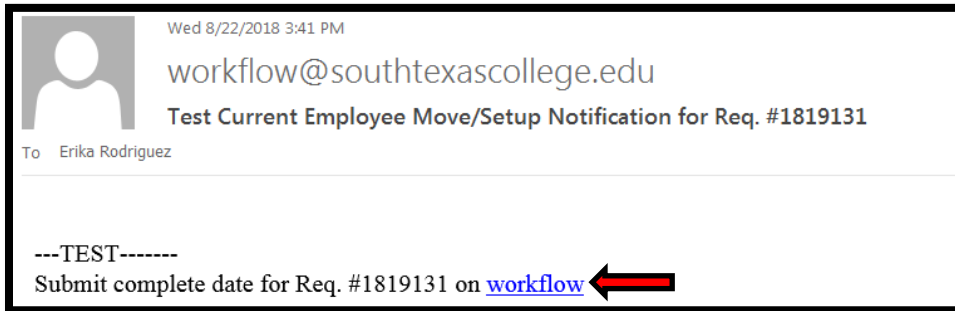
Move Schedule Date: 25-OCT-18

\* If name is blank then move/setup is for a future hire employee: N

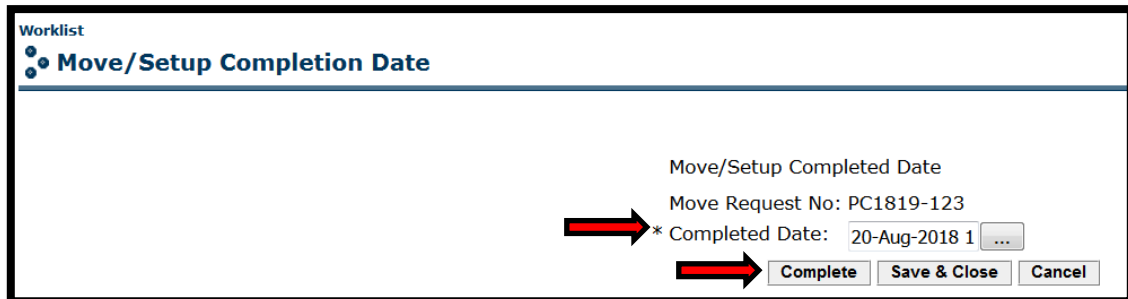
Planning & Construction

## 4.2 Completion Date

On the date of the move, the client receives an automatic email notification requesting to submit the move completion date.



- Click on the workflow hyperlink.
- Log in.
- Indicate on the *Complete Date* drop down box the date that the move was completed.
- Select *Complete*.





## 4.3 Move Completion

On the date of the move, the client receives an automatic email notification requesting to submit the move completion date.

Subsequent to the client indicating the date the move was completed, an email notification is sent to the client and to the appropriate key stakeholders indicating the completion of the move/setup. ***Please note, the client will receive an email notification for silver and non-inventory assets.***



workflow@southtexascollege.edu

Test FINAL MOVE EMAIL Current Employee Move/Setup **Silver Tag Notification** for Request Number: Req #1819331

To Erika Rodriguez

Cc Francisco De Leon; Heather Thompson; Maday Avila; Juan Reyes; Teresa Sanchez; Armando Garza; Jesus G. Flores (Chuy); Jorge Sanchez; Roel Moroles

-----MOVE/SETUP TEST EMAIL FOR COMPLETION DATE-----

Move/setup request number 1819331 for Erika Denise Romero Rodriguez scheduled for 25-OCT-18

Request number 1819331

Employee Name: Erika Denise Romero Rodriguez

Employee Type: Current Employee

Scheduled Date: 25-OCT-18

Complete Date: 26-Oct-2018 11:25:42 AM

Move/Setup Workflow Notification



workflow@southtexascollege.edu

Test FINAL MOVE EMAIL Current Employee Move/Setup **Non-Inventory Notification** for Req. #1819332

To Francisco De Leon; Heather Thompson; Maday Avila; Juan Reyes; Teresa Sanchez; Armando Garza; Jesus G. Flores (Chuy); Jorge Sanchez; Roel Moroles

Cc Erika Rodriguez

-----MOVE/SETUP TEST EMAIL FOR COMPLETION DATE-----

Move/Setup Information is as follows:

Request number 1819332

\*Employee Name: Erika Denise Romero Rodriguez

Employee Type: Current Employee

Scheduled Date: 25-OCT-18

Complete Date: 26-Oct-2018 11:25:31 AM

\* If name is blank then move/setup is for a future hire employee:

N

Move/Setup Workflow Notification

## Section 5: Disapproval

### 5.1 Financial Manager Disapproval

The Financial Manager and the Site Coordinator have the option to disapprove a move request. If a move request is disapproved, an email notification is sent to the client with a disapproval comment.



Tue 9/18/2018 12:07 PM

beckyc@southtexascollege.edu

Test @emp\_typeTransfer Email for Silver Tag: 30493 - PTag N00023904 - 30493 - Wireworks Cubicle Station by FGUTIERREZ\_3068 for PC1819-142

To: Frank Jason Gutierrez

Cc: Erika Rodriguez

CAUTION: This email originated from outside South Texas College. Do not click links or open attachments unless you recognize the sender and know the content is safe.

This is to notify you that the transfer for PTag:  
Asset Tag Number and Description

30493 - Wireworks Cubicle Station

was disapproved by the New Equipment Manager. Transfer information is as follows:

**Disapproval** Comment: Disapprove

From: Equipment Manager: FGUTIERREZ\_3068 - Frank Gutierrez

To: Equipment Manager: @New\_Equip\_Manager\_UserID - Becky Cavazos

Custodian: FGUTIERREZ\_3068 - Frank Gutierrez

Orgn: 480001 - Accountability, Risk, and Complian

Location: 557607 - PCN Bldg N Rm 160E

---

## 5.2 Facilities Planning and Construction Disapproval

Facilities Planning and Construction can also disapprove a move request. An email notification is sent to the client with a disapproval comment.




workflow@southtexascollege.edu

Test Current Employee Disapproval Notification for Move/Setup Approval for Req #1819334 and for Silver Tag: 18728 - Dell Latitude E6500 by FGUTIERREZ\_3068

To Erika Rodriguez

Cc Francisco De Leon; Heather Thompson; Maday Avila

 We removed extra line breaks from this message.

----TEST PLANNING AND CONST DISAPPROVAL EMAIL ---- We have received your move/set up request to relocate Erika Denise Romero Rodriguez from Pecan Campus n 160f to Pecan Campus n 160b. Facilities Planning and Construction department has disapproved your move. Please refer to the disapproval comments below.

Disapproval Comments: test disapproval

Thank you for your understanding,  
Planning and Construction Department

## Section 6: Move Cancellation

The client notifies Facilities Planning and Construction if the move request needs to be cancelled. However, if the confirmation form has already been approved by the receiving FM, the receiving FM will need to transfer the asset(s) back to the client who initiated the move.


## Section 7: Data Drop Request - Example

### Fixed Assets Move or Setup


Request Move or Setup Type:

Employee Type:

Employee's A# to Move/Setup

Justification  

Employee's Position#

Employee Department   **Your department information**

TO:

Campus:  Bldg:  Office/Room#:

Will Boxes be required? ☐ Yes ☒ No

How many?

Need assistance to move boxes? ☐ Yes ☒ No

Do you need to move/setup technology equipment? ☒ Yes ☐ No


Do you need to move/setup furniture? ☐ Yes ☒ No

Financial Manager Requesting


Fixed Asset Transfers/Setup ☐ Silver Tag (Includes Furniture)  
☒ Purple, Green, & No Tag (Includes Furniture)

### Request Transfer to Auction/Surplus


Move/Setup Request#

Manager Requesting   **Your Financial Manager**

Initiator's Phone#

Justification  

You have 107 characters left.

To Financial Manager   **Your Financial Manager**

From Location

To Location

Tag#	Serial#	Description
<input type="text" value="n/a"/>	<input type="text" value="n/a"/>	What is data drop <u>for</u> . (ex. computer, printer) <span style="color: red; font-weight: bold;">1</span>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>