



# Computer Transfer Form Instructions

# Computer Transfer Form Specifics

- When to use this form:
  - Use when a computer or server with a cost of less than \$5000 is being transferred to a new location/dept. or division or the computer/server is being sent to Surplus Property.
- Requirements:
  - Transfers from one division to another require approval from the transferring **from** division and the transferring **to** division.
  - Transfers from one person to another or to a new location in the same division only require approval from the receiving division.

# Why Complete this Form?

- Computer/Server locations are tracked by the university to protect sensitive data.
- University employees are expected to follow the policy for equipment inventory.
- Your Department has access to a computer/server inventory report located in SSRS (details on slide/page 11)
- Verification of your inventory is required by the university equipment policy and should be completed the same time as your fixed asset inventory or by end of May annually.

# Submitters/Approvers

How were submitters/approvers identified?

- Budget Managers sent a list of the submitters and Approvers for each unit on campus to ITS.

How can a submitter/approver be modified?

- The Budget Manager for your unit can change the submitters and approvers by putting in a Team Dynamix ticket.
- <https://uncw.teamdynamix.com/TDClient/Home/>

# Information Required

The submitter must have the following information for the form:

- Name/Room #/Building/Dept./Division of person **currently using** the computer
- Serial/Service Tag Number and FAS if available
- Manufacturer (Dell, HP, Apple)
- Model (Example: Optiplex 960)
- Name/Room #/Building/Dept./Division of person **receiving** the computer
- Name of Receiving Approver/and Releasing if applicable

# Completing the Transfer Request

- Log in to mySeaport.
- Select Administrative Services Tab.
- Select Computer Transfers.
- Select Submit a Computer Transfer Request.
- Enter the equipment information in the Transfer Equipment Section.
- Enter the current custodian information in the Transfer From Section.

# Completing the Transfer Request (cont.)

- Answer the Surplus question (Is this a request for Surplus?). *To view details for **Surplus Process** please skip to **Surplus Process slide/page 10** in this document.*
- If “no” to surplus question, complete the new custodian information in the Transfer to Section.
- In Approval Section:
  - Receiving Approver is the Department Head or Budget Authority of the **new** custodian.
  - Releasing Approver is the **current** custodian’s Department Head or Budget Authority.
  - Submitter should follow up to be sure approvals are completed.

# Approval Process

- Approver receives an email notification to log into the Computer Transfer System and approve a request.
- Approver will access the system via mySeaport and will select **View Your Transfers and Approvals**.
- Approver can view the details of the transfer request by clicking on the Request ID Number.
- Approver reviews the transfer for accuracy.
  - The “transfer to” information such as name/dept. can be changed prior to approving.
- Approver closes the transfer request.



## Approval Process (cont.)

- Approver selects Approve/Deny in the set status column.
  - Comments can be made for denials so the submitter knows what corrections need to be made.
- Approver submits the form.
- If transfer is denied, submitter gets email notification and resubmits with corrected data.
- When the transaction is completed and all approvals are received, the submitter will receive a notification that the process is complete.

# Surplus Process

- To Surplus a computer or server you will need the same information as in a transfer request (serial #, etc.).
- In the Transfer From section, answer *yes* to the question: Is this a request for Surplus?
  - Clicking *yes* requires the location and a contact phone number to be entered into the “Comments” section in order for the machine to be picked up.
- The receiving approver is Warehouse Manager and automatically populates.
- A releasing approver is required.

# Viewing the SSRS Reports

All faculty and staff have access to computer inventory SSRS reports. Here's the path:

- UNCW main Web page ([www.uncw.edu](http://www.uncw.edu))
- Faculty & Staff
- SSRS Web Reports (left panel)
- Financial Reports
- Campus Reports
- Computer Tracking
- ITSD Computer Inventory by Dept.
- Select Org and click “View Report” to view inventory and/or download to Excel.

# Helpful Information

- New inventory is assigned to the Org based on the FOA in Banner associated with the Purchase Order.
- Computrace will retrieve last log in ID and date for computers with Computrace installed that access our campus Network. *This will assist you with your annual physical inventory.*

# Questions?

Inventory-related questions:

Patty Thompson

910-962-7943

[Thompsonpl@uncw.edu](mailto:Thompsonpl@uncw.edu)

Technical questions:

Technology Assistance Center (TAC)

910-962-4357

<https://uncw.teamdynamix.com/TDClient/Home/>