

# **Inventory Control: Web App Tutorial**

March 3, 2020

# Table of Contents

Definitions Glossary.....	3
Phase I Introduction.....	4
How to Log in.....	4
Navigating Main Screens.....	5
Asset Management Breakdown.....	6
Search by Index.....	7
Editing your Assets.....	8
How to Enter Asset Information.....	9
Asset Status Codes.....	10
Tagging Confirmation.....	11
Entering Multiple Assets.....	12
Editing Availability.....	13
Requesting a Tag Early .....	14
Deleting an Early Tagging Request .....	16
Phase I Summary.....	17
Phase II Introduction.....	18
Requesting Authorization to Edit Assets.....	19
Transfers Between Departments.....	20
Transfers to Surplus.....	28

## **Definitions Glossary**

### **Asset**

Non-expendable property that has an original cost of \$2000 or more or is a computer (desktop or laptop, at any original cost.)

### **Equipment Manager**

The WKU faculty or staff member who is responsible for the asset.

### **Index Number**

Also known as 'Org Code'. A six digit code used to identify a specific department or organization.

### **Inventory Control**

A subsidiary of Supply Chain Management, led by the Inventory Control Coordinator.

### **Make**

The manufacturers trade name of a particular product.

### **Manufacturer**

The name of the company or person who provided the asset.

### **Model**

A unique identifier assigned to an asset by its manufacturer.

### **O-tag**

A temporary tag or origination tag that Banner assigns to an item when an invoice is paid to a fixed asset expense account.

### **P-tag**

A permanent tag that Inventory Control assigns to a temporary tag. This is also referred to as the ICN (Inventory Control Number).

### **Purchase Order**

The Purchase Order, or PO [abbr.] is a commercial document issued by a buyer to a seller, indicating types, quantities, and agreed prices for products or services. PO numbers for WKU currently have two prefixes, P00 and WK.

### **Purchase Order #**

P00 and WK followed by 5 unique numbers.

### **Purchase Order Item #**

A number which corresponds to the location of an asset on a PO. (Line 1, Line 2, etc.)

### **Requestor**

The person who entered the requisition for the asset.

### **Serial #**

A unique code used to identify an asset.

### **Shipping Code**

Also known as 'Ship to Code', a mailing code used to identify which department an asset belongs to.

### **Tagging**

The process wherein Inventory Control will physically tag an asset with a specialized printed sticker containing a number that corresponds to the asset in Banner.

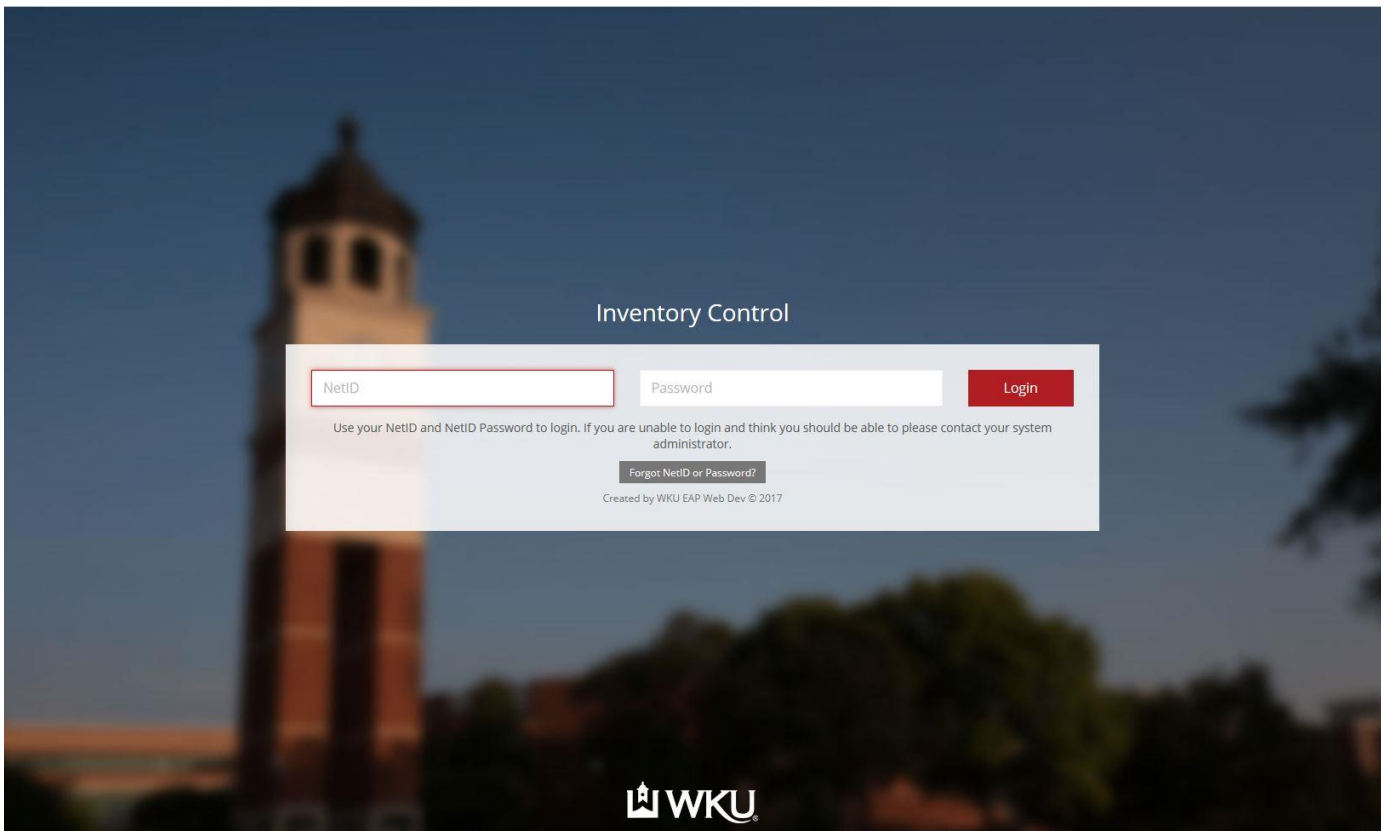
# Phase I

## Introduction

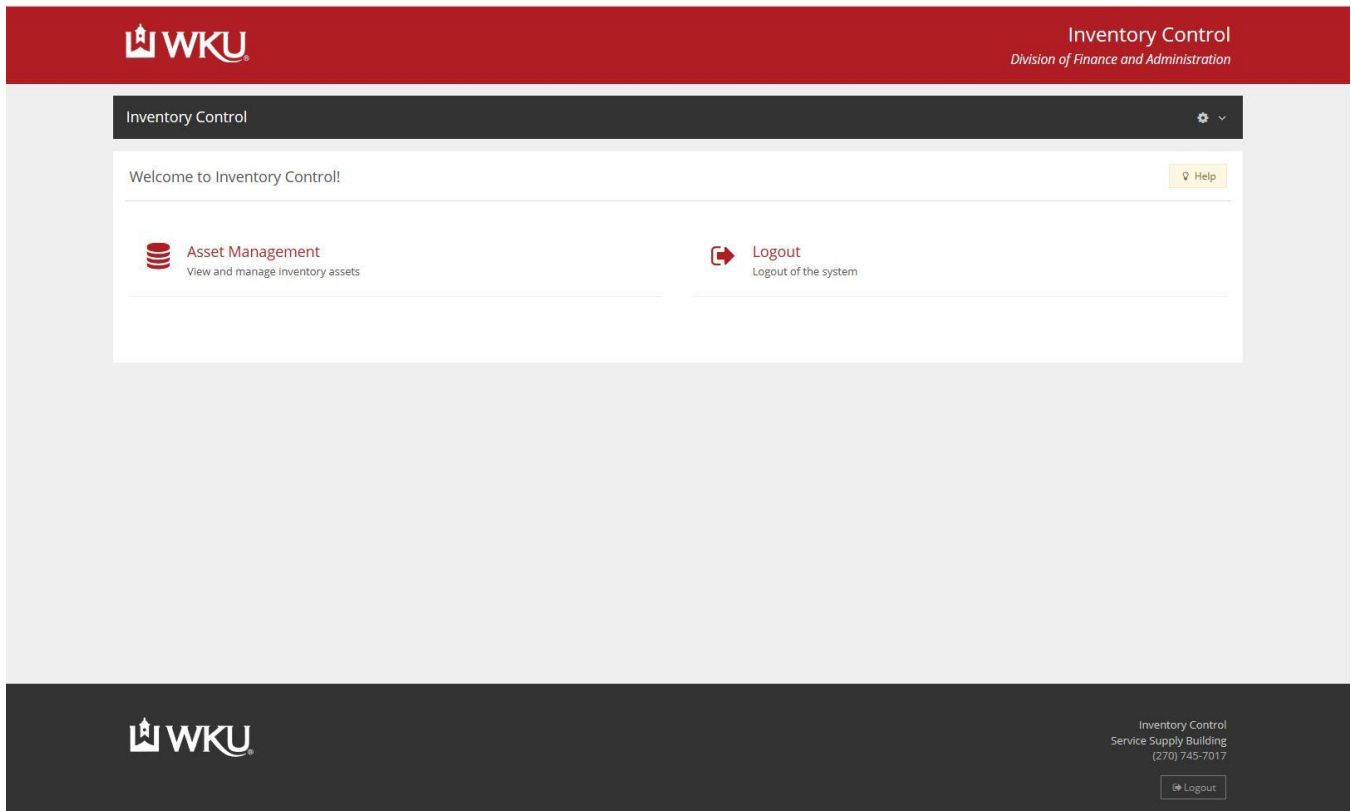
This is a tutorial of the User Group features within the new inventory control website. We will be covering everything that the *User Group* will have access to within the new website. The '*User Group*' refers to all WKU Faculty and Staff involved in the ordering or management of University assets. If you would like to request training in the new system, please contact WKU Inventory Control at [inventorycontrol@wku.edu](mailto:inventorycontrol@wku.edu).

## How to Log In

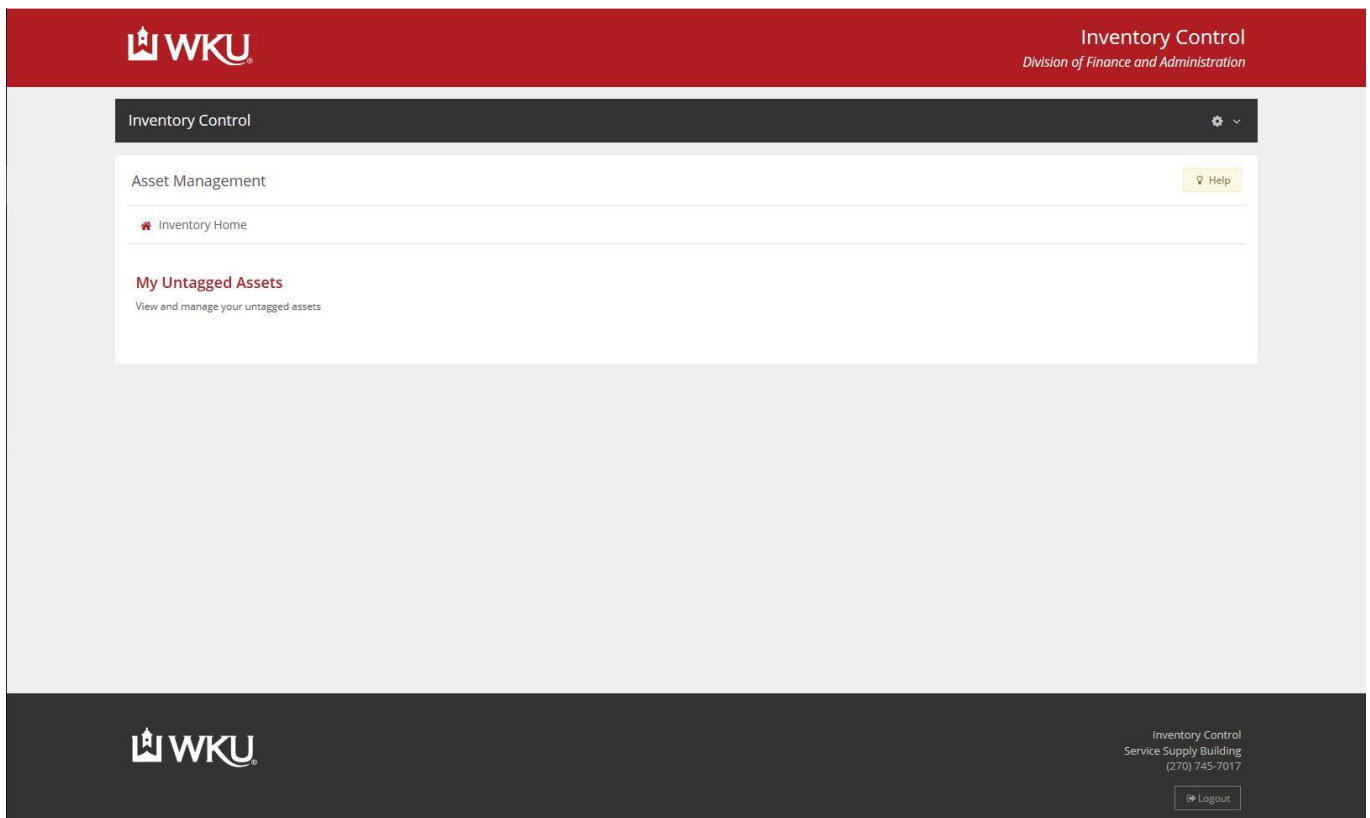
- Visit the WKU Inventory Control website at: <https://app.wku.edu/inventory>
- Log in using your WKU NetID and Password:



- The main screen will show two options: *Asset Management* and *Logout*:



- After selecting Asset Management, you will see *My Untagged Assets*:



## Asset Management – My Untagged Assets

- After clicking on *My Untagged Assets*, you will be directed to this page:

Inventory Control  
Division of Finance and Administration

Inventory Control

Asset Management - My Untagged Assets

Inventory Home Asset Management My Untagged Assets

+ Add Asset  
Don't see your asset in the list? Add it here.

Search By Index  
Search Departmental Indexes

Show 50 entries

Search

Date	PO	Identifier	Index	Description	Cost	Status	Scheduled Date	Scheduled Time	Actions
2018-07-02	WK029456	1-T00112239	290402	Dell Latitude 5490;Dell Latitude 5490 XCTO	\$1,229.97	Needs Info			
2018-07-02	WK029365	2-T00112240	290403	Dell Latitude 7490;Dell Latitude 7490, XCTO	\$2,231.00	Needs Info			

Showing 1 to 2 of 2 entries

Previous 1 Next

Inventory Control  
Service Supply Building  
(270) 745-7017

Logout

Assets are assigned to each department based on the requestor and departmental code used on the PO.

- A breakdown of the columns is as follows:
  - **Date:** When the asset becomes available for tagging.
  - **PO:** The order number associated with the asset.
  - **Identifier:** The first number is the order item number, the second number is the Origination Tag. For example, '3-T00105776' would translate to order item #3 and Otag T00105776.
  - **Index:** The departmental index code associated with the asset on the PO.
  - **Description:** A general description of the asset ordered.
  - **Cost:** Dollar amount of the asset.
  - **Status:** The current status of the asset.
    - **Needs Info:** Asset needs information entered by the order requestor.
    - **Pending Review:** The information entered by the requestor needs to be reviewed by Inventory Control.
    - **Tag Ready:** The asset has been reviewed by Inventory Control and is ready to be tagged.
  - **Scheduled Date:** The date that the requestor specified for Inventory Control to tag the asset.
  - **Scheduled Time:** The time that the requestor will be available for Inventory Control to tag the asset.
  - **Actions:** Allows edit options so the requestor can modify the information entered on an asset and modify specified scheduling.

- In some situations, you may be responsible for managing assets for one or more departmental index numbers; regardless of whether you were the person whom submitted the purchase order. The *Search By Index* feature, will allow you to view a list of untagged assets tied to a specific index number rather than by requestor.

Inventory Control  
Division of Finance and Administration

Inventory Control

Asset Management - My Untagged Assets

Inventory Home Asset Management My Untagged Assets

+ Add Asset  
Don't see your asset in the list? Add it here.

Show 50 entries

Search

Date	PO	Identifier	Index	Description	Cost	Status	Scheduled Date	Scheduled Time	Actions
2018-07-02	WK029456	1-T00112239	290402	Dell Latitude 5490;Dell Latitude 5490,XCTO	\$1,229.97	Needs Info			
2018-07-02	WK029365	2-T00112240	290403	Dell Latitude 7490;Dell Latitude 7490,XCTO	\$2,231.00	Needs Info			

Showing 1 to 2 of 2 entries

Previous 1 Next

Inventory Control  
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(270) 745-7017

Logout

- After clicking the *Search By Index* link, you will be presented with a list of departmental index numbers you have access to. Select one or more index numbers, then hit *Submit* to see a list of associating untagged assets.

Asset Management - Departmental Indexes

Inventory Home Asset Management My Untagged Assets

Choose one or more departmental indexes below:

Clear All Select All Submit

Index Number	Department	Select
290405	Academic Dept Computer Lab Support	<input checked="" type="checkbox"/>
290402	Academic Technology	<input type="checkbox"/>
290403	Student Technology	<input type="checkbox"/>

- You can remove the index selection by clicking the *Clear Indexes* link. This will return you to a list of untagged assets from which you are listed as the requestor (i.e. assets you put in a purchase order for).

**Editing your Assets**

- To edit an asset and schedule tagging, begin by clicking on the *Edit* button under ‘Actions’:

**Inventory Control** Maintenance ▾

Inventory Control  
Division of Finance and Administration

Asset Management - My Untagged Assets Help

Inventory Home Asset Management My Untagged Assets

**+ Add Asset**  
Don't see your asset in the list? Add it here.

**Search By Index**  
Search Departmental Indexes

Show 50 entries Search

Date	PO	Identifier	Description	Cost	Status	Scheduled Date	Scheduled Time	Actions
2017-05-17	P0095340	3-T00105772	Functional Package:	\$4,999.00	Needs Info			
2017-05-17	P0095340	5-T00105773	Sports Package:	\$7,499.00	Needs Info			
2017-05-17	P0095340	4-T00105774	Research Gait Package:	\$4,999.00	Needs Info			
2017-05-17	P0095340	2-T00105776	Balance Package:	\$4,999.00	Needs Info			

Showing 1 to 4 of 4 entries Previous 1 Next

**WKU** Inventory Control  
Service Supply Building  
(270) 745-7017 Logout

- Asset Management – Edit screen:

**Inventory Control** Maintenance ▾

Inventory Control  
Division of Finance and Administration

Asset Management - Edit Help

Inventory Home Asset Management Home My Untagged Assets

**Purchase Information**

Date: 17-MAY-2017 PO: P0095340 Requestor: rodney.hounshell@wku.edu Vendor: VirtuSense Technologies LLC Unit Price: \$4,999.00 Asset Identifier: 3-T00105772

**Item Description**  
Functional Package:

**General Information**

Acquisition Date \* In Service Date \* Equipment Manager Email\* Location \*

**Asset Information**

Serial \* Make \* Model \* Manufacturer \*

**Tagging Availability**

Date Start Time End Time

Add Another Date

Update Asset

**WKU** Inventory Control  
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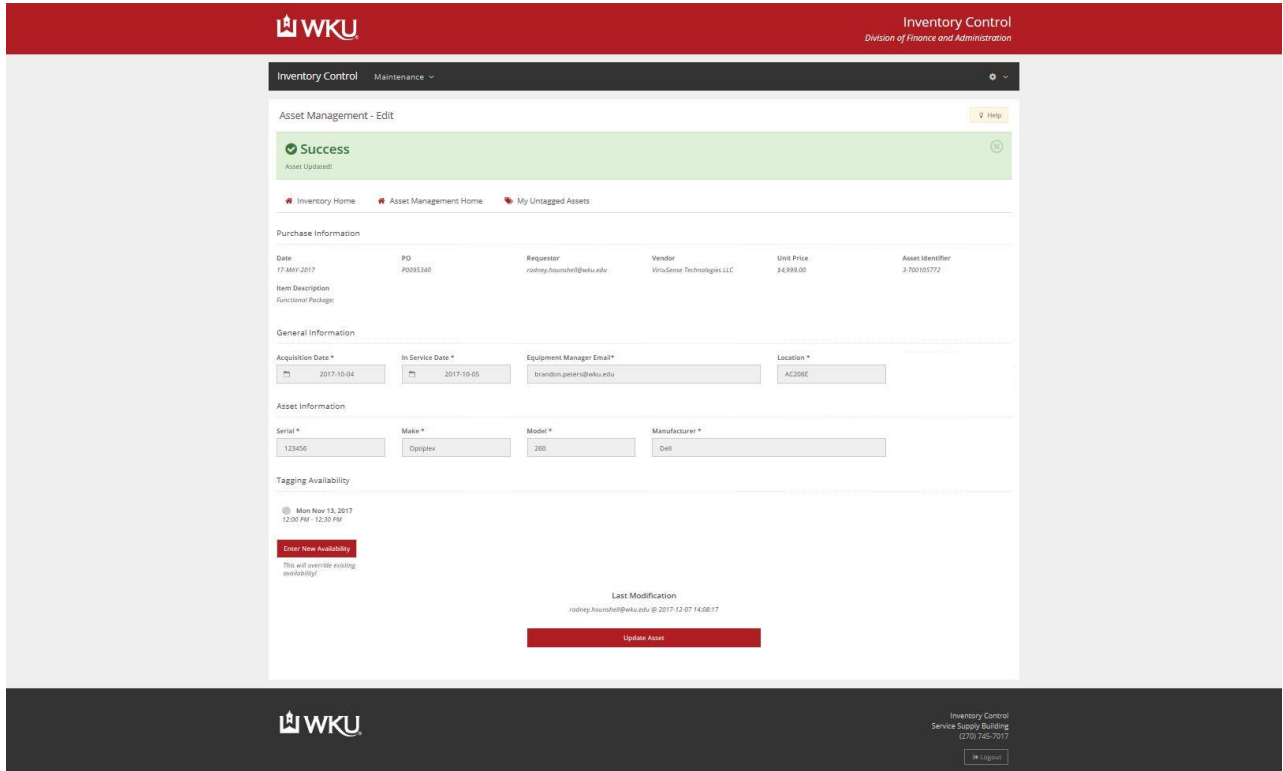
## How to Enter Asset Information

The screenshot displays the 'Asset Management - Edit' interface within the WKU Inventory Control system. The page is organized into several sections:

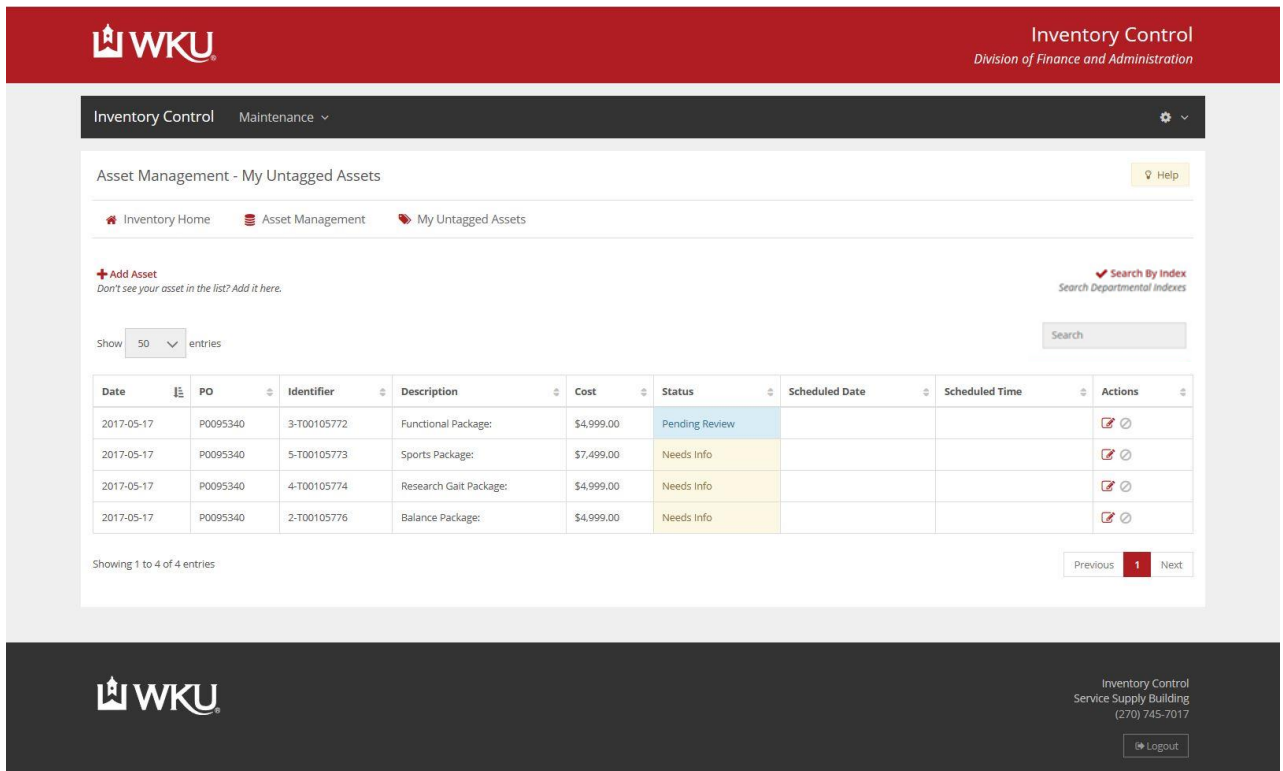
- Purchase Information:** A table with columns for Date (17-MAY-2017), PO (P0095340), Requestor (rodney.hounshell@wku.edu), Vendor (VirtuSense Technologies LLC), Unit Price (\$4,999.00), and Asset Identifier (3-T00105772). Below this is an 'Item Description' field with the value 'Functional Package'.
- General Information:** Fields for Acquisition Date (2017-10-04), In Service Date (2017-10-05), Equipment Manager Email (brandon.peters@wku.edu), and Location (AC206E Academic Complex 2nd FL RM 206e).
- Asset Information:** Fields for Serial # (123456), Make (Optiplex), Model (260), and Manufacturer (Dell).
- Tagging Availability:** Fields for Date (2017-11-13), Start Time (12:00 PM), and End Time (12:30 PM). There is an 'Add Another Date' button and an 'Update Asset' button at the bottom.

- On the *Asset Management – Edit* screen, you will see a list of fields that indicate which information we need from you in order to schedule the tagging of the asset.
- Purchase Information: Some purchase information will automatically populate.
  - Date, PO, Requestor, Vendor, Unit Price, Asset Identifier, Dept Index, Ship To, and Item Description will automatically populate.
- General Information: This header contains fields that need to be filled out for the asset.
  - Acquisition Date: When did the the University acquire this asset?
  - In Service Date: When was the asset first installed or received?
  - Equipment Manager Email: Who is responsible for the asset?
  - Asset Location: Building and room number where the asset will be located.
    - When entering the location, a drop down menu will assist you in finding the correct building and room number.
- Asset Information: This section is used to enter in the specifics of the asset you need to have tagged.
  - Serial #: A unique code used to identify an asset.
  - Make: The manufacturers trade name of the asset.
  - Model: An identifier of an asset given by its manufacturer.
  - Manufacturer: The name of the company or person who provided the asset.
- Tagging Availability
  - Date: Which date (or dates) are you available for someone to tag your asset.
    - By clicking within the grey field, you can select the date from a drop down list.
    - You may add as many dates as you wish. Adding more than one date will help us accommodate your availability.
  - Start Time: The earliest time you will be available on the designated date.
    - By clicking within the grey field, you can select the time from a drop down list.
  - End Time: The time you will no longer be available on the designated date.
    - By clicking within the grey field, you can select the time from a drop down list.
- After you fill out all of the necessary fields, select *Update Asset* to save your changes.

- After you enter the asset information, you will see a message that indicates that changes were saved:



- When you return to the *My Untagged Assets* webpage, you will see that the asset status is now *Pending Review*:



- The Inventory Control Coordinator will be notified of the asset update and will verify your request.

- After the Inventory Control Coordinator has verified your request, the status will change to *Tag Ready*.

The screenshot shows the WKU Inventory Control website interface. At the top, there is a red header with the WKU logo and the text 'Inventory Control Division of Finance and Administration'. Below the header, there is a navigation bar with 'Inventory Control' and a dropdown menu for 'Maintenance'. The main content area is titled 'Asset Management - My Untagged Assets' and includes a 'Help' button. There are breadcrumb links for 'Inventory Home', 'Asset Management', and 'My Untagged Assets'. A '+ Add Asset' button is present with the text 'Don't see your asset in the list? Add it here.' and a 'Search By Index' button with the text 'Search Departmental Indexes'. A search bar is also visible. Below this, there is a table with columns: Date, PO, Identifier, Description, Cost, Status, Scheduled Date, Scheduled Time, and Actions. The table contains four rows of data. The first row has a status of 'Tag Ready' (green background), while the others are 'Needs Info' (yellow background). At the bottom of the table, it says 'Showing 1 to 4 of 4 entries' and has 'Previous', '1', and 'Next' navigation buttons. The footer of the page includes the WKU logo, contact information for the Inventory Control Service Supply Building (270) 745-7017, and a 'Logout' button.

Date	PO	Identifier	Description	Cost	Status	Scheduled Date	Scheduled Time	Actions
2017-05-17	P0095340	3-T00105772	Functional Package:	\$4,999.00	Tag Ready	Fri Dec 29, 2017	03:30 PM - 04:00 PM	
2017-05-17	P0095340	5-T00105773	Sports Package:	\$7,499.00	Needs Info			
2017-05-17	P0095340	4-T00105774	Research Gait Package:	\$4,999.00	Needs Info			
2017-05-17	P0095340	2-T00105776	Balance Package:	\$4,999.00	Needs Info			

- You will receive an email update that confirms the tagging has been scheduled.

**From:** Inventory Control  
**Sent:** Thursday, December 7, 2017 11:24 AM  
**To:** Peters, Brandon <brandon.peters@wku.edu>  
**Subject:** Inventory Control: Asset Ready for Tagging

Greetings!

This is a status update from the WKU Inventory Control department regarding an asset that you recently updated information for.

This asset has now been reviewed and scheduled for ICN tagging. If you need to re-schedule, please do so from the Inventory Control website listed below. If not, an inventory control representative will be arriving at the scheduled date/time to tag this asset.

*Requestor:* brandon.peters@wku.edu  
*PO:* P0098000  
*Asset Identifier:* 21  
*Vendor:* Dell Premier

You may login to the Inventory Control website using your NetID credentials here:  
<https://app.wku.edu/inventory>

WKU Inventory Control  
 Service Supply Building  
 (270) 745-7017

## How to Enter Asset Information for Multiple Assets

- If multiple assets are detected for a given PO, you will be presented with this message towards the bottom of the “Asset Management – Edit” form:

**Multiple Assets Found**

There are 151 assets tied to the same PO and PO line item. To save time, choose 1 or more fields within the  **Copy to All Assets** section below. Then click **Update Asset** and ALL assets will be pre-populated with the same value.

**Note:** Only choose fields in which the value will be exactly the same for all assets. For example, *Serial* number cannot be pre-populated as this value is unique to each asset.

**Copy to All Assets**

- Acquisition Date
- In Service Date
- Equipment Manager Email
- Asset Location
- Make
- Model
- Manufacturer
- Tagging Availability

Update Asset

- This function allows you to choose which fields you would like to “Copy to All Assets”.
  - This function can be used at any time, and it can be repeated as many times as necessary.
    - For example, if a user accidentally updated all assets with the wrong “In Service Date”, they could simply correct it on any asset form and then select that field.
    - You also have the option to leave all of the fields un-checked which will then **ONLY** update the specific asset you have selected.

## How to Edit Availability

- Click on the *Edit* button under the *Actions* subheader.

The screenshot shows the 'Inventory Control' interface. At the top right, it says 'Inventory Control Division of Finance and Administration'. Below the header, there's a navigation bar with 'Inventory Control' and 'Maintenance'. The main content area is titled 'Asset Management - My Untagged Assets'. It includes a search bar and a table of assets. The table has columns for Date, PO, Identifier, Description, Cost, Status, Scheduled Date, Scheduled Time, and Actions. The first row shows an asset with ID 3-T00105772, status 'Tag Ready', and scheduled date 'Fri Dec 29, 2017'. The 'Actions' column for this row has a yellow 'Edit' button. Below the table, it says 'Showing 1 to 4 of 4 entries'.

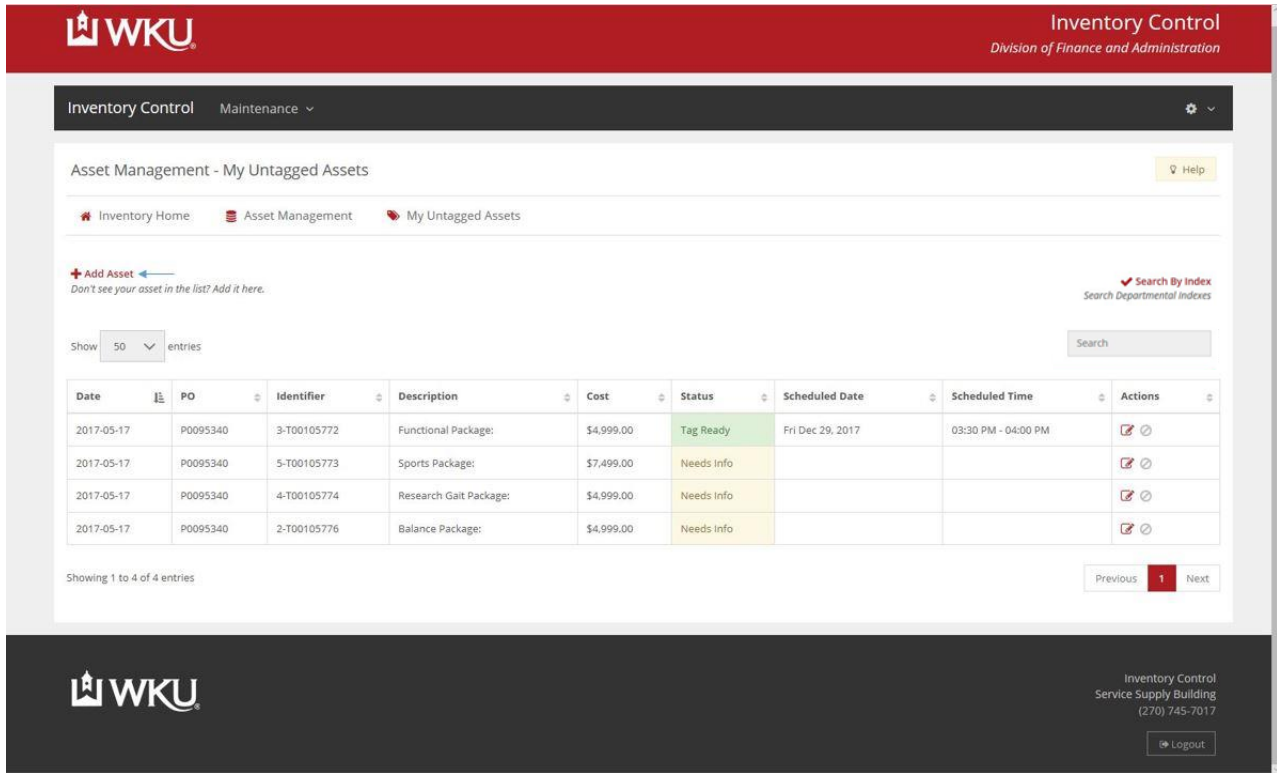
Date	PO	Identifier	Description	Cost	Status	Scheduled Date	Scheduled Time	Actions
2017-05-17	P0095340	3-T00105772	Functional Package:	\$4,999.00	Tag Ready	Fri Dec 29, 2017	03:30 PM - 04:00 PM	[Edit] [Refresh]
2017-05-17	P0095340	5-T00105773	Sports Package:	\$7,499.00	Needs Info			[Checkmark] [Refresh]
2017-05-17	P0095340	4-T00105774	Research Gait Package:	\$4,999.00	Needs Info			[Checkmark] [Refresh]
2017-05-17	P0095340	2-T00105776	Balance Package:	\$4,999.00	Needs Info			[Checkmark] [Refresh]

- Click on *Enter New Availability* and enter in the appropriate information. After completing, select *Update Asset*.

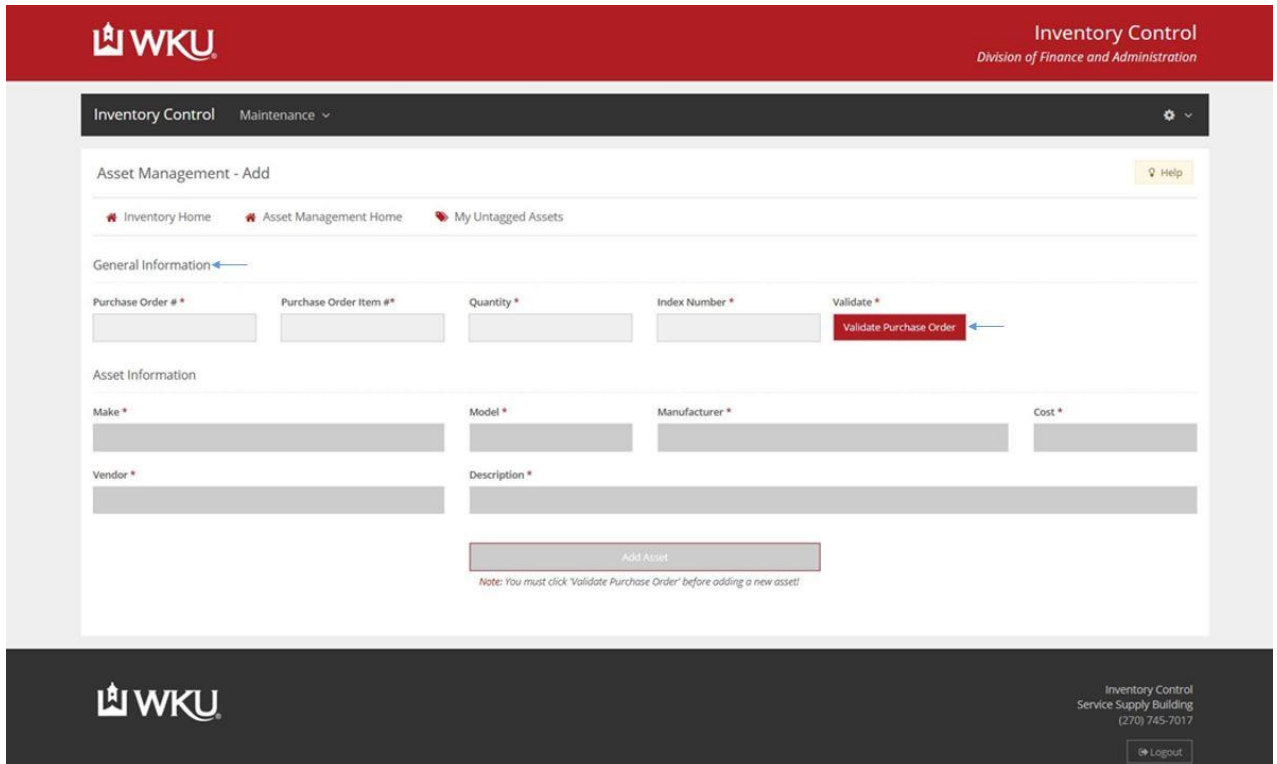
The screenshot shows the 'Asset Management - Edit' form. It contains several sections: 'Purchase Information' (Date: 17-MAR-2017, PO: P0095340, Requestor: rodney.hounshell@wku.edu, Vendor: VirtuSense Technologies LLC, Unit Price: \$4,999.00, Asset Identifier: 3-T00105772), 'General Information' (Acquisition Date: 2017-10-04, In Service Date: 2017-10-05, Equipment Manager Email: brandon.peters@wku.edu, Location: AC206E), 'Asset Information' (Serial: 123456, Make: Optiplex, Model: 260, Manufacturer: Dell), and 'Tagging Availability' (Two radio buttons for availability dates: 'Fri Dec 29, 2017 03:30 PM - 04:00 PM' (selected) and 'Sun Dec 31, 2017 03:00 PM - 04:00 PM'). A red 'Enter New Availability' button is highlighted with a blue arrow. Below this, there's a 'Last Modification' section showing the user rodney.hounshell@wku.edu and a 'Reviewed By' section showing brandon.peters@wku.edu. At the bottom, a red 'Update Asset' button is highlighted with a blue arrow.

**Requesting Early Asset Tagging**

- This section is only used to request a tag for an asset that is not yet showing up in *My Untagged Assets*:
- Select *Add Asset* near the top of the webpage:

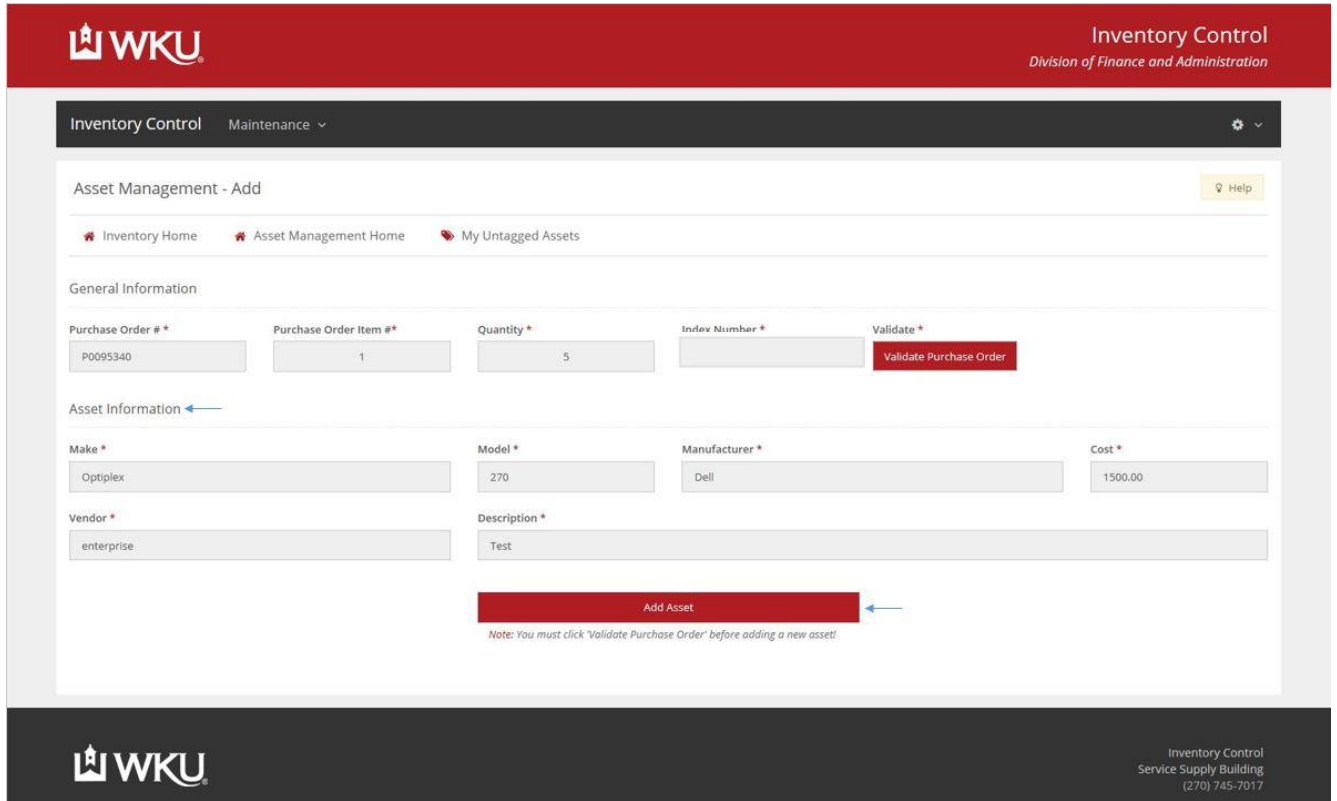


- Add Purchase Order information under the *General Information* subheader and select *Validate Purchase Order*

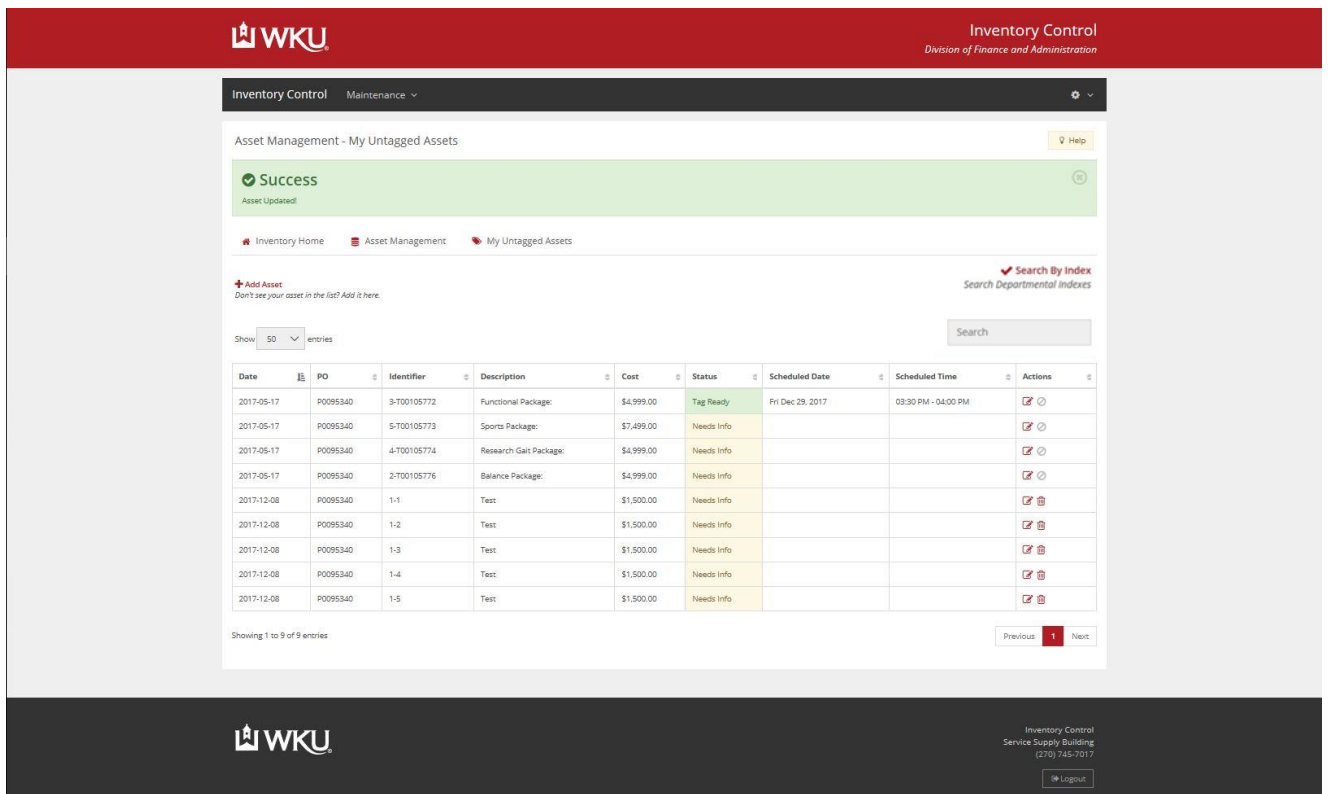


- After entering PO information, select *Validate Purchase Order*.

- After validating, enter *Asset Information*:



- After everything is filled out, select *Add Asset*.
- When you select *Add Asset*, you will be returned to the *My Untagged Assets* page.



## Deleting an Early Asset Tagging Request

- In the event that an asset tagging request was created in error, you can delete it by selecting the Trash Bin Icon:

Inventory Control  
Division of Finance and Administration

Asset Management - My Untagged Assets

Success  
Asset Updated!

Inventory Home Asset Management My Untagged Assets

Add Asset  
Don't see your asset in the list? Add it here.

Search By Index  
Search Departmental Indices

Show 50 entries

Date	PO	Identifier	Description	Cost	Status	Scheduled Date	Scheduled Time	Actions
2017-05-17	P0095340	3-T00105772	Functional Package:	\$4,999.00	Tag Ready	Fri Dec 29, 2017	03:30 PM - 04:00 PM	[Check] [Trash]
2017-05-17	P0095340	5-T00105773	Sports Package:	\$7,499.00	Needs Info			[Check] [Trash]
2017-05-17	P0095340	4-T00105774	Research Gas Package:	\$4,999.00	Needs Info			[Check] [Trash]
2017-05-17	P0095340	2-T00105776	Balance Package:	\$4,999.00	Needs Info			[Check] [Trash]
2017-12-08	P0095340	1-1	Test	\$1,500.00	Needs Info			[Check] [Trash] ←
2017-12-08	P0095340	1-2	Test	\$1,500.00	Needs Info			[Check] [Trash]
2017-12-08	P0095340	1-3	Test	\$1,500.00	Needs Info			[Check] [Trash]
2017-12-08	P0095340	1-4	Test	\$1,500.00	Needs Info			[Check] [Trash]
2017-12-08	P0095340	1-5	Test	\$1,500.00	Needs Info			[Check] [Trash]

Showing 1 to 9 of 9 entries

Previous 1 Next

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Login

- When you select the Trash Bin Icon, you will be directed to this screen where you can select *Delete Asset*:

Inventory Control  
Division of Finance and Administration

Asset Management - Delete

Inventory Home Asset Management Home My Untagged Assets

Requested Assets List

Show 50 entries

Date	PO	PO Item	Identifier	Requestor	Description	Status
2017-12-08 08:24:50	P0095340	1	1-1	rodney.hounshell@wku.edu	Test	Needs Info
2017-12-08 08:24:50	P0095340	1	1-2	rodney.hounshell@wku.edu	Test	Needs Info
2017-12-08 08:24:50	P0095340	1	1-3	rodney.hounshell@wku.edu	Test	Needs Info
2017-12-08 08:24:50	P0095340	1	1-4	rodney.hounshell@wku.edu	Test	Needs Info
2017-12-08 08:24:50	P0095340	1	1-5	rodney.hounshell@wku.edu	Test	Needs Info

Showing 1 to 5 of 5 entries

Previous 1 Next

**Delete Asset** ←

NOTE: Assets with the same PO and PO item number will be deleted!

Inventory Control  
Service Supply Building  
(270) 745-7017

Login



## Summary

### Let's review:

As a result of completing Phase I of this tutorial, you have

- Navigated the User Interface
- Checked your Untagged Assets
- Edited your Assets
- Entered Asset information
- Scheduled Tagging
- Edited Availability
- Requested Early Tagging
- Deleted an Early Tagging Request

### Quick Reference

Development Phases	Description	Rollout Date
<b>Phase I</b>	<b>General asset tagging</b>	<b>08/14/2018</b>
Phase II	Asset transfers and disposals	TBA
Phase III	Annual Inventory	TBA

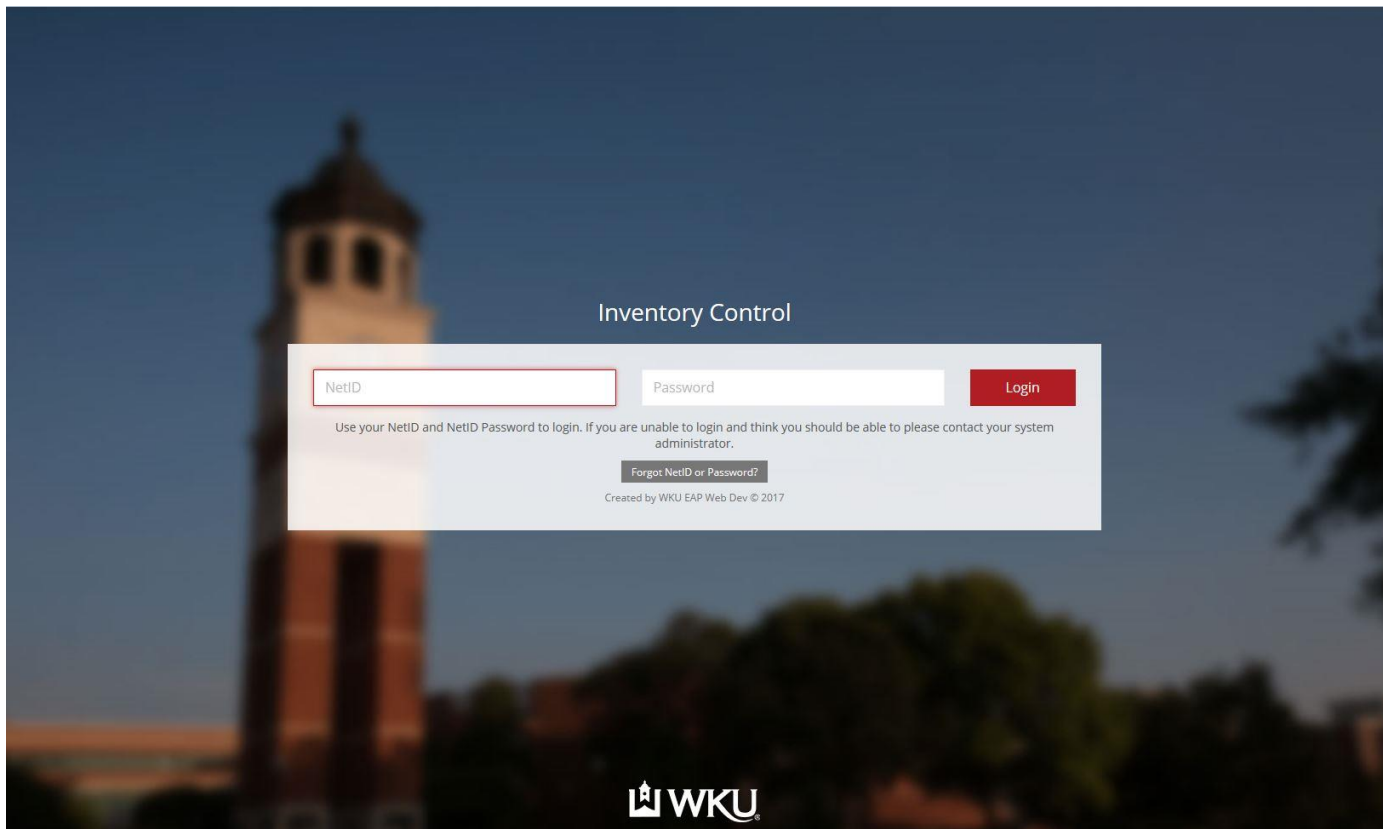
# Phase II

## Introduction

Phase II handles the access and transfer of assets. In this Phase, you will learn how to add users to indexes in the web app in order to edit asset information and eventually as we move forward with Phase II, we will implement a full transfer system which will streamline the way that transfers are completed University-wide. If you would like to request training in the new system, please contact WKU Inventory Control at [inventorycontrol@wku.edu](mailto:inventorycontrol@wku.edu).

## How to Log In

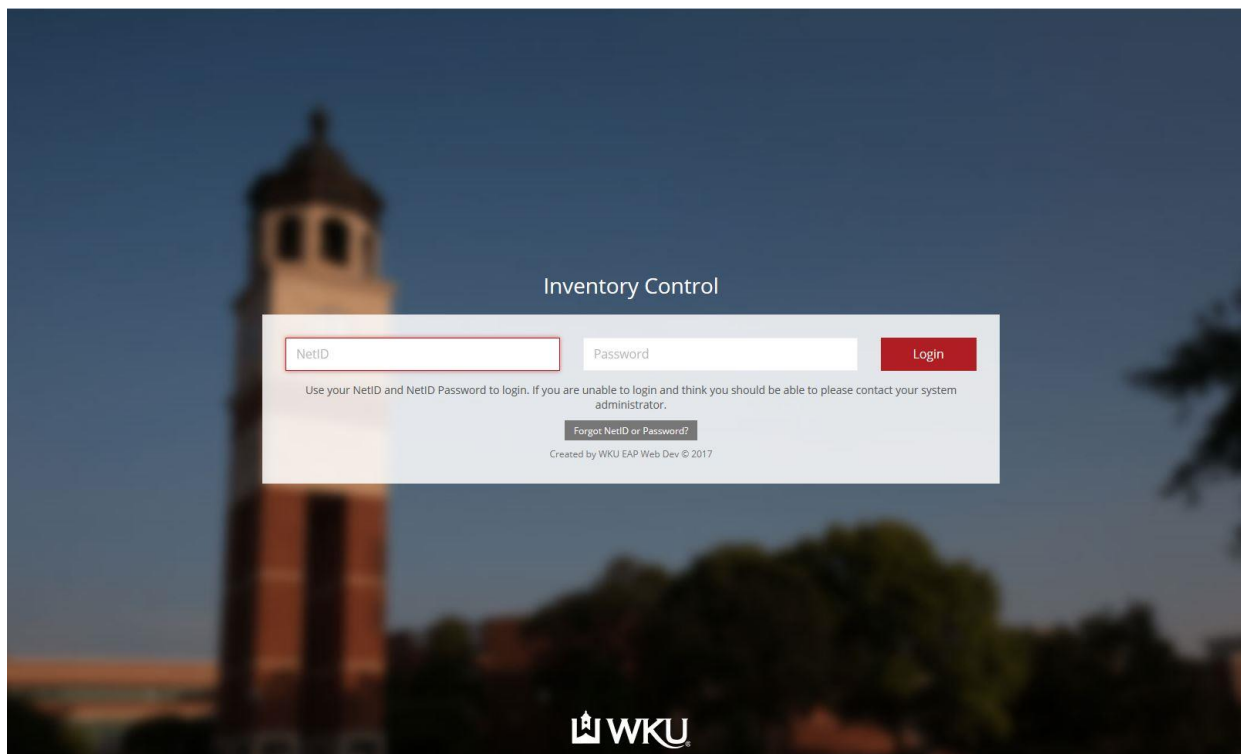
- Visit the WKU Inventory Control website at: <https://app.wku.edu/inventory>
- Log in using your WKU NetID and Password:





## Transfers Between Departments

- Visit the WKU Inventory Control website at: <https://app.wku.edu/inventory>
- Log in using your WKU NetID and Password:



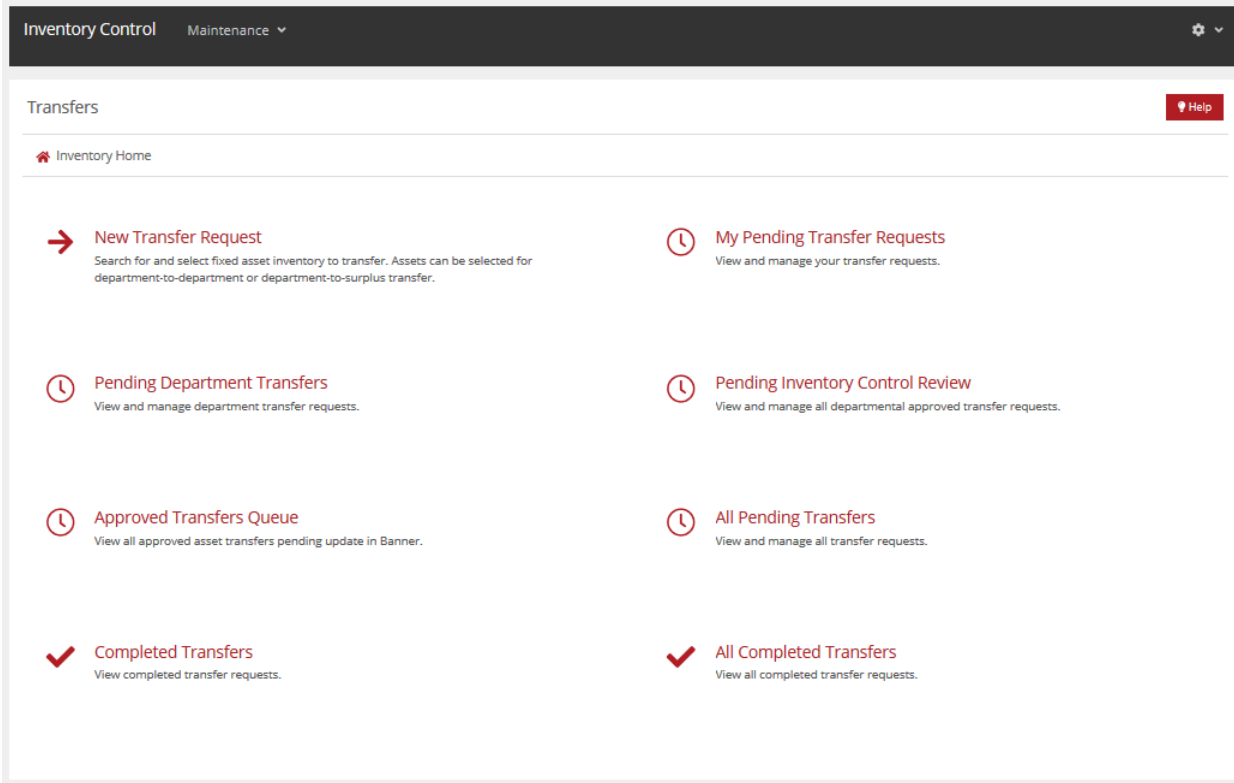
After logging in, please click on the Transfers Link:



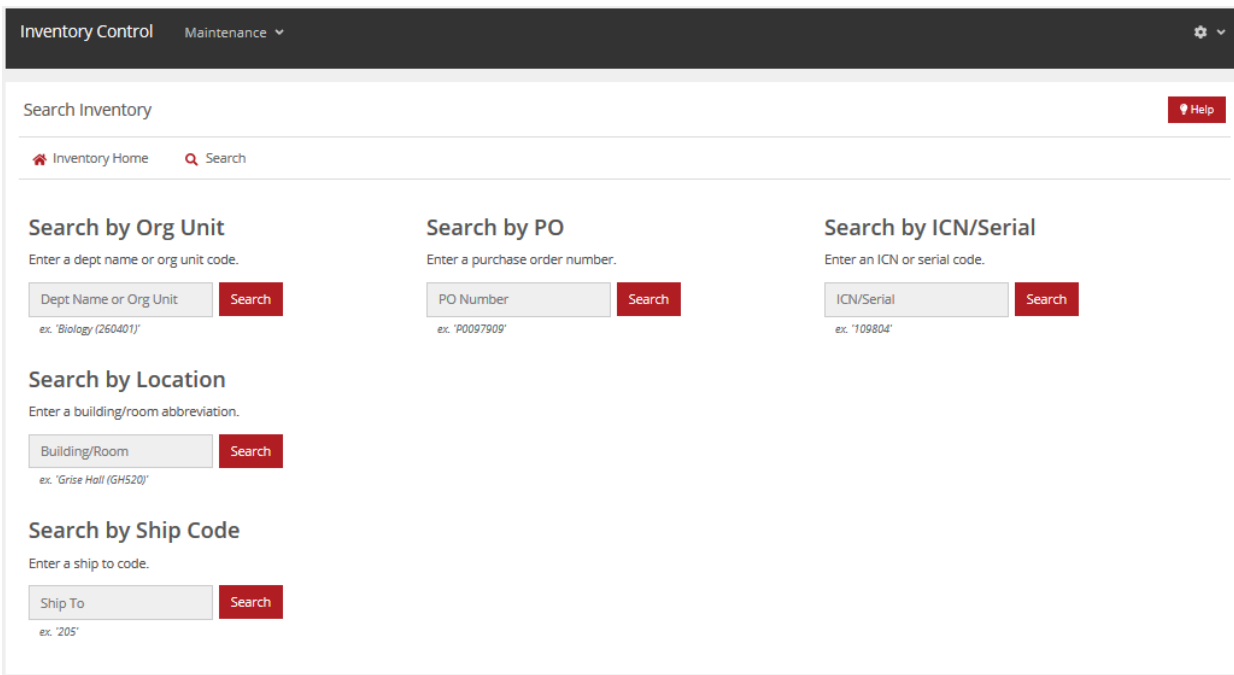
### Transfers

View and manage asset transfer requests.

After clicking on the transfers radial button, you will be directed to this page:

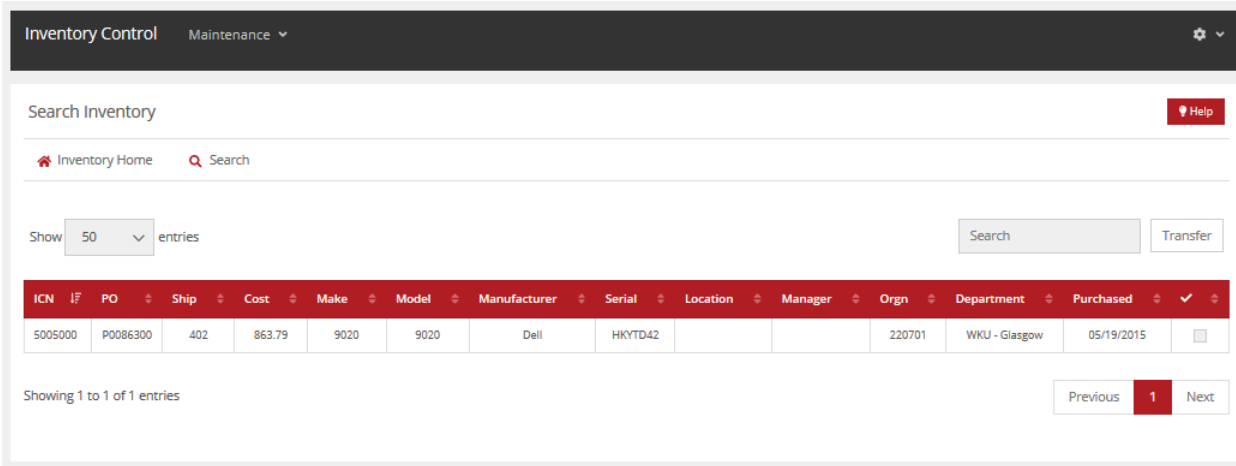


**By pressing on the radial titled “New Transfer Request” you will be directed here:**



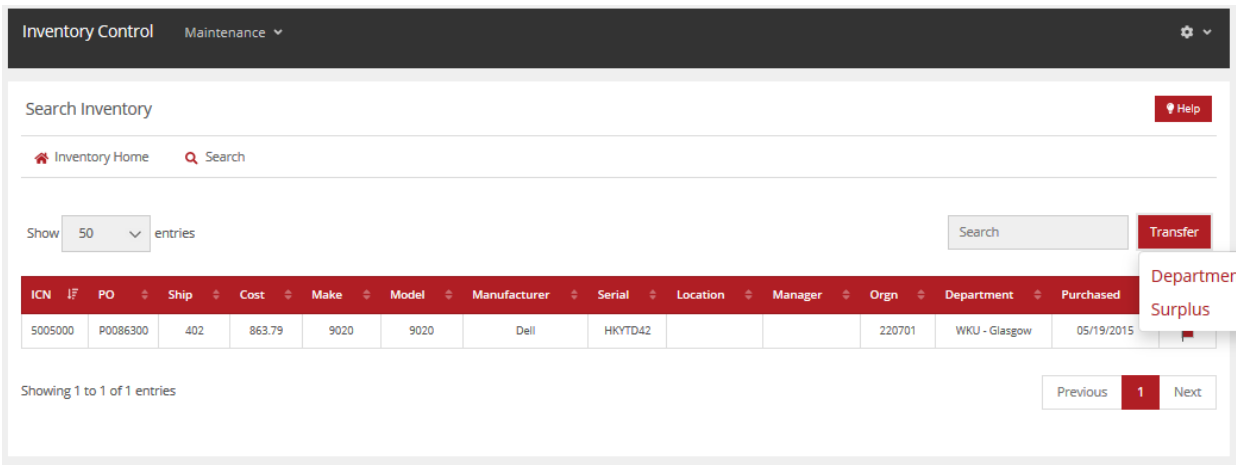
In order to search for an asset, enter information into any of the fields and press ‘Search’

- For this example we used ICN# 5005000
- After pressing search, you will be directed here:



Press the red radial to the very right of the data and select Transfer at the top next to ‘Search’

- For this example we will first go over how to transfer to ‘Department’



After clicking on ‘Department’ you will be directed here

The screenshot shows the 'Transfers - Request' form in the Inventory Control system. The form is titled 'Transfers - Request' and has a 'Help' button in the top right corner. Below the title, there are two navigation links: 'Inventory Home' and 'Transfers Home'. The main section is titled 'Request Information (Transfer to Department)'. It contains several input fields with labels and instructions:

- Transfer to Dept \* Change Dept**: A text input field with the instruction 'The department in which this asset(s) should be transferred to.'
- Transfer to Location \* Change Location**: A text input field with the instruction 'The location in which this asset(s) should be transferred to.'
- Transfer to Ship To**: A text input field with the instruction 'The ship to code in which this asset(s) should be transferred to.'
- Equipment Manager**: A text input field with the example 'ex. Big, Red' and the instruction 'Enter the name of the person whom will receive this asset(s).'
- Equipment Manager Info**: A text input field with the instruction 'Name and department of selected equipment manager.'
- Equipment Manager Email**: A text input field with the instruction 'Email address of the person whom will receive this asset(s).'
- Dept Contact Type**: A text input field.
- Dept Contact Name**: A text input field with the instruction 'Name of the departmental contact whom will receive this transfer request.'
- Dept Contact Email**: A text input field with the instruction 'Email address of the departmental contact whom will receive this transfer request.'
- Transfer Reason \***: A large text area with the instruction 'Any further explanation describing the reason of transfer.'

At the bottom of the form, there are two buttons: 'Cancel' and 'Submit Request'. Below the buttons, there is a note: '\*\*Be sure to check all assets below before submitting this request!'.

There are several fields that need to be filled out in order for the transfer to be submitted

1. Transfer to Department
  - a. Enter the name of the department you want to transfer to and select it
  - b. Some pre-defined information will automatically populate
2. Transfer to Location
  - a. Enter the name of the location you want to transfer to and select it
3. Transfer to Ship To Code
  - a. Optional
  - b. If you know the ship to code of the department you are transferring to, enter it here.
  - c. This can be filled out later on by the department or Inventory Control Coordinator
4. Equipment Manager
  - a. Optional
  - b. Enter the name of the equipment manager you want to transfer to and select it
  - c. Some pre-defined information will automatically populate
  - d. This can be filled out later on by the department
5. Transfer Reason
  - a. Enter the reason for transfer and/or any notes.

Here is an example of how the submission should look

Inventory Control Maintenance
⚙️

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Transfers - Request Help

[Inventory Home](#) [Transfers Home](#)

Request Information (Transfer to Department)

<p><b>Transfer to Dept * Change Dept</b></p> <input type="text" value="Supply Chain Management - 103103"/> <p><small>The department in which this asset(s) should be transferred to.</small></p>	<p><b>Transfer to Location * Change Location</b></p> <input type="text" value="SB109"/> <p><small>The location in which this asset(s) should be transferred to.</small></p>	<p><b>Transfer to Ship To</b></p> <input type="text" value="111"/> <p><small>The ship to code in which this asset(s) should be transferred to.</small></p>
--	---	--

<p><b>Equipment Manager</b></p> <input type="text" value="800554356"/> <p><small>Enter the name of the person whom will receive this asset(s).</small></p>	<p><b>Equipment Manager Info</b></p> <input type="text" value="Rodney Hounshell (Supply Chain Management)"/> <p><small>Name and department of selected equipment manager.</small></p>	<p><b>Equipment Manager Email</b></p> <input type="text" value="rodney.hounshell@wku.edu"/> <p><small>Email address of the person whom will receive this asset(s).</small></p>
<p><b>Dept Contact Type</b></p> <input type="text" value="Financial Manager"/>	<p><b>Dept Contact Name</b></p> <input type="text" value="Ken Baushke"/> <p><small>Name of the departmental contact whom will receive this transfer request.</small></p>	<p><b>Dept Contact Email</b></p> <input type="text" value="ken.baushke@wku.edu"/> <p><small>Email address of the departmental contact whom will receive this transfer request.</small></p>

**Transfer Reason \***

TEST

Any further explanation describing the reason of transfer.

\*\*Be sure to check all assets below before submitting this request!

After entering all of the information, click on 'submit request' and you will be directed here:

- All Transfer requests you have made as the requestor will populate here.

Inventory Control Maintenance
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Transfers - My Pending Requests Help

✓ **Success** ✕

Transfer request added successfully!

[Inventory Home](#) [Transfers Home](#)

Show  entries Search

Assets	Transfer Dept	Status	Requested Date	Last Modified	Actions
1	Supply Chain Management - 103103	Pending Dept Review	2020-03-04 15:39:38	N/A	<a href="#">📄</a> <a href="#">🗑️</a>

Showing 1 to 1 of 1 entries Previous **1** Next



**Next up we will cover 'Pending Department Transfers' which can be accessed through this radial button:**



After selecting the radial button, you will be directed to this page

- This is what the receiving department sees as soon as the transferring department completes their request.

Inventory Control Maintenance

Transfers - Department Review Pending Help

[Inventory Home](#) [Transfers Home](#)

Show 50 entries

Requestor	Assets	Transfer Dept	Status	Requested Date	Last Modified	Actions
Brandon Peters	2	Application & Prgm Services - 290504	Pending Dept Review	2020-03-04 12:58:55	2020-03-04 13:32:18	<input checked="" type="checkbox"/>
Rodney Hounshell	1	Supply Chain Management - 103103	Pending Dept Review	2020-03-04 15:39:38	N/A	<input checked="" type="checkbox"/>

Showing 1 to 2 of 2 entries Previous 1 Next

In order to access and approve the transfer, the receiving personnel must first select the check mark radial.

Inventory Control Maintenance

Transfers - Department Review Pending Help

[Inventory Home](#) [Transfers Home](#)

Show 50 entries

Requestor	Assets	Transfer Dept	Status	Requested Date	Last Modified	Actions
Brandon Peters	2	Application & Prgm Services - 290504	Pending Dept Review	2020-03-04 12:58:55	2020-03-04 13:32:18	<input checked="" type="checkbox"/>
Rodney Hounshell	1	Supply Chain Management - 103103	Pending Dept Review	2020-03-04 15:39:38	N/A	<input checked="" type="checkbox"/>

Showing 1 to 2 of 2 entries Previous 1 Next

By Selecting the check mark radial, the receiving personnel will be directed here:

Inventory Control Maintenance
⚙️

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Transfers - Receiving Department Review Help

[Inventory Home](#) [Transfers Home](#)

**Transfer Assets Pending Receiving Department Review**

One or more assets in this transfer request are currently pending review. You will receive a status update via email once it has been reviewed by the receiving department.

**Request Information**

**Transfer to Dept**

Supply Chain Management - 103103

The department in which this asset(s) should be transferred to.

**Transfer to Location**

Supply Service Bldg 1st FL RM 109 - SB109

The location in which this asset(s) should be transferred to.

**Transfer to Ship To**

111

The ship to code in which this asset(s) should be transferred to.

**Equipment Manager**

800554356

Enter the name of the person whom will receive this asset(s).

**Equipment Manager Info**

Rodney Hounshell (Supply Chain Management)

Name and department of selected equipment manager.

**Equipment Manager Email**

rodney.hounshell@wku.edu

Email address of the person whom will receive this asset(s).

**Dept Contact Type**

Financial Manager

**Dept Contact Name**

Ken Baushke

Name of the departmental contact whom will receive this transfer request.

**Dept Contact Email**

ken.baushke@wku.edu

Email address of the departmental contact whom will receive this transfer request.

**Transfer Reason \***

TEST

Any further explanation describing the reason of transfer.

**Selected Assets for Transfer**

Transfer from Dept	ICN	PO	Make	Model	Manufacturer	Serial	Cost	Status	Select
WKU - Glasgow - 220701	5005000	P0086300	9020	9020	Dell	HKYTD42	\$863.79	Pending	<input checked="" type="checkbox"/>

**Inventory Control Review**

**Add Review Comment**

Deny Request

Approve Request

You must select all assets in order to approve a request.

There are several actions to take on this page:

1. Verify that all information is correct
2. Fill in the ship to code if it was not previously filled in
3. Fill in the equipment manager if they were not previously assigned
4. Select the radial button next to all of the assets that you approve of transferring (will turn red)
5. Add a review comment, and select 'Approve Request'

After selecting 'Approve Request' you will be directed back to this page

- The Inventory Control Coordinator will be notified of your submission and will approve the submission or reach out with further questions.
- This is the last step the receiving department needs to take before transfer completion.

Inventory Control Maintenance ▾ ⚙️ ▾

Transfers - Department Review Pending Help

✔ Success ✕  
 Transfer request review has been submitted!

[Inventory Home](#) [Transfers Home](#)

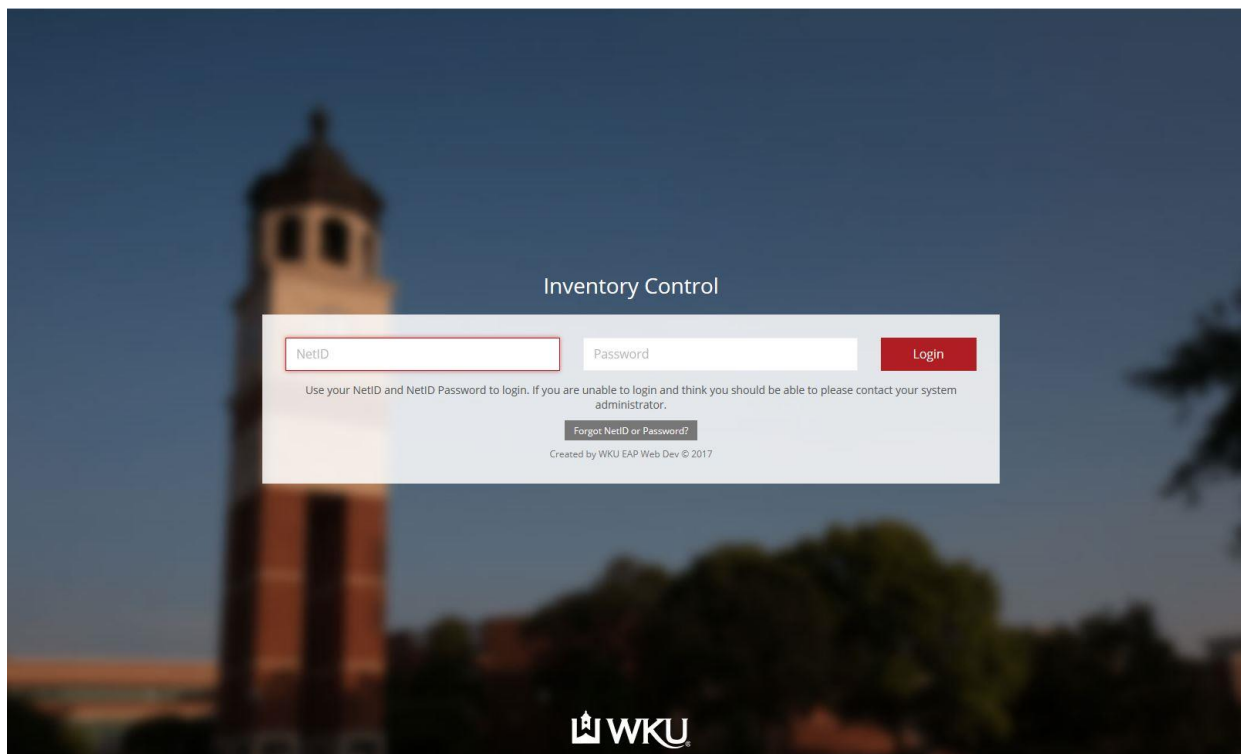
Show  entries Search

Requestor	IF Assets	Transfer Dept	Status	Requested Date	Last Modified	Actions
Brandon Peters	2	Application & Prgm Services - 290504	Pending Dept. Review	2020-03-04 12:58:55	2020-03-04 13:32:18	✔
Rodney Hounshell	1	Supply Chain Management - 103103	Pending IC Review	2020-03-04 15:39:38	N/A	✔

Showing 1 to 2 of 2 entries Previous 1 Next

## Transfers to Surplus

- Visit the WKU Inventory Control website at: <https://app.wku.edu/inventory>
- Log in using your WKU NetID and Password:



After logging in, please click on the Transfers Link:



## Transfers

View and manage asset transfer requests.

After clicking on the transfers radial button, you will be directed to this page:

**Inventory Control** Maintenance ▾ ⚙️ ▾

**Transfers** 🔔 Help

[🏠 Inventory Home](#)

- ➔ New Transfer Request**  
Search for and select fixed asset inventory to transfer. Assets can be selected for department-to-department or department-to-surplus transfer.
- 🕒 My Pending Transfer Requests**  
View and manage your transfer requests.
- 🕒 Pending Department Transfers**  
View and manage department transfer requests.
- 🕒 Pending Inventory Control Review**  
View and manage all departmental approved transfer requests.
- 🕒 Approved Transfers Queue**  
View all approved asset transfers pending update in Banner.
- 🕒 All Pending Transfers**  
View and manage all transfer requests.
- ✅ Completed Transfers**  
View completed transfer requests.
- ✅ All Completed Transfers**  
View all completed transfer requests.

**By pressing on the radial titled “New Transfer Request” you will be directed here:**

**Inventory Control** Maintenance ▾ ⚙️ ▾

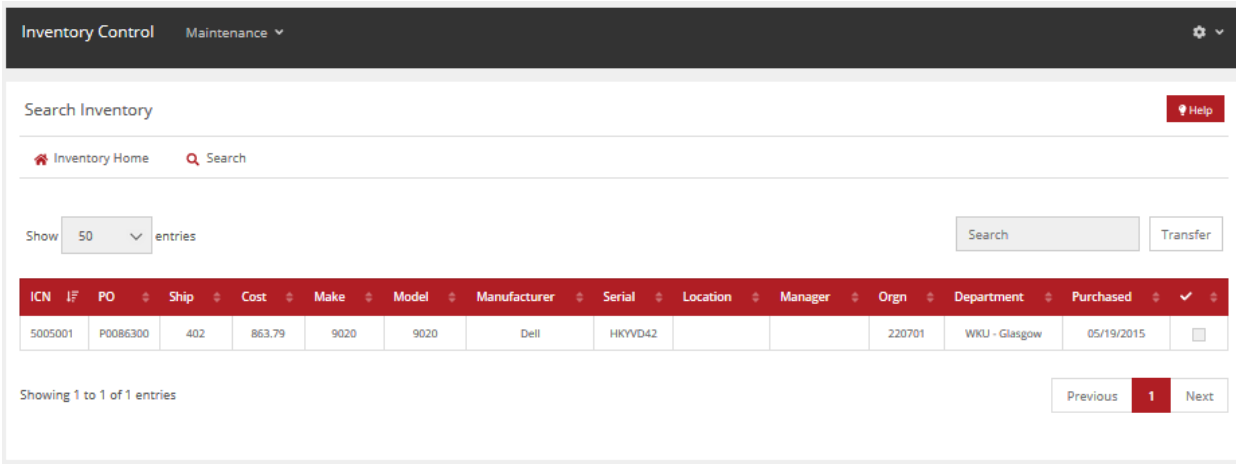
**Search Inventory** 🔔 Help

[🏠 Inventory Home](#) 🔍 Search

- Search by Org Unit**  
Enter a dept name or org unit code.  
 **Search**  
ex: 'Biology (260401)'
- Search by PO**  
Enter a purchase order number.  
 **Search**  
ex: 'P0097909'
- Search by ICN/Serial**  
Enter an ICN or serial code.  
 **Search**  
ex: '109804'
- Search by Location**  
Enter a building/room abbreviation.  
 **Search**  
ex: 'Grise Hall (GHS20)'
- Search by Ship Code**  
Enter a ship to code.  
 **Search**  
ex: '205'

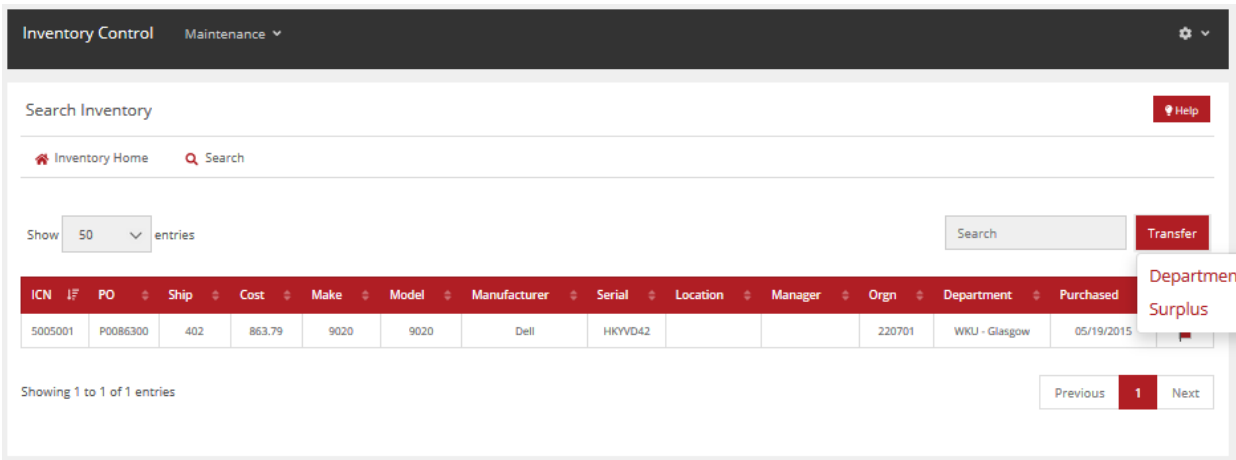
In order to search for an asset, enter information into any of the fields and press ‘Search’

- For this example we used ICN# 5005001
- After pressing search, you will be directed here:



Press the red radial to the very right of the data and select Transfer at the top next to ‘Search’

- For this example we will first go over how to transfer to ‘Surplus’



After selecting ‘Surplus’ the requestor will be directed here:

- Transfer reason is required
- After reason entered, press submit request

The screenshot shows the 'Transfers - Request' page in the Inventory Control system. The page title is 'Transfers - Request' and it includes a 'Help' button. There are navigation links for 'Inventory Home' and 'Transfers Home'. The main section is titled 'Request Information (Transfer to Surplus)'. A 'Transfer Reason' field is present, with a note below it: 'Any further explanation describing the reason of transfer.' Below the text area are 'Cancel' and 'Submit Request' buttons. A warning message states: '\*\*Be sure to check all assets below before submitting this request!'. At the bottom, there is a table titled 'Selected Assets for Transfer'.

Transfer from Dept	ICN	PO	Make	Model	Manufacturer	Serial	Cost	Type
WKU - Glasgow - 220701	5005001	P0086300	9020	9020	Dell	HKYVD42	\$863.79	Standard

At this time, the user will be sent back to their pending transfer request dashboard:

- Surplus will review your request and accept or reject your transfer data.

The screenshot shows the 'Transfers - My Pending Requests' dashboard. It includes a 'Help' button, navigation links for 'Inventory Home' and 'Transfers Home', and a search bar. A dropdown menu shows '50 entries'. Below is a table with columns: 'Assets', 'Transfer Dept', 'Status', 'Requested Date', 'Last Modified', and 'Actions'. The table contains one entry with the status 'Pending Dept Review'. At the bottom, it shows 'Showing 1 to 1 of 1 entries' and navigation buttons for 'Previous', '1', and 'Next'.

Assets	Transfer Dept	Status	Requested Date	Last Modified	Actions
1	Waste Management	Pending Dept Review	2020-03-04 16:10:34	N/A	