


Create a Transfer of Technology

Site-to-Site Transfers do not allow tags in the status of "Lost" or "Stolen" to be transferred. Scanning or typing one of these tag numbers into the transfer will result in an error and the tag status will need to be updated to add it successfully to the transfer.

1. Click on **Initiate Transfer** under "Transfer Tools Quick Links." The "Initiate Transfer" window opens.
2. Select the site receiving the item(s) from the **Destination** drop-down menu. For ERR/Disposals of Technology, the Destination is **W06 Kiest Warehouse**.
3. Click on  **Create New Transfer** next to the "Destination" field.

Initiate Transfer ✕

Transfer Details


Transfer #: ↓ ↻


Type: Site to Site


Status: New

Destination: Learning Campus


Actions

 Submit Transfer

 Delete Transfer



 Print Transfer Ticket

Submitted Approved Scheduled In Transit Receiving Completed



Tagged Inventory to Transfer ↑

Tag / Serial: ↓ ↻


	Tag	Product Number	Product Name	Previous Status	Actions
	3817	2000064	Lenovo ThinkCentre M57e	In Use	

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Untagged Inventory to Transfer ↓

Transfer Notes ↓





4. For tagged items, enter/scan the **Tag Number** or **Serial Number** into the **Tag/Serial** field, located in the "Tagged Inventory to Transfer" section.

5. For untagged items, click on **Untagged Inventory to Transfer** to expand this section.
6. Enter/scan the product number in the **Product Number** field,
OR  **Search** to select the respective untagged product.
7. Enter an alpha/numeric value in the **Identifier** field.

The "Identifier" is an alphanumeric value of up to 25 characters (such as a serial number) used to provide extra identifying information of untagged inventory. The identifier is associated with the quantity of the untagged inventory entered. No two quantities of the same product can have the same Identifier.

8. Enter the quantity to transfer into the **Quantity** field.
9. Click on  **Add Untagged Inventory**.
10. Click on **Transfer Notes** to expand this section. Type the location where the devices will be stored until they are picked up. The location should be on the 1st floor for access by Motor Pool or the Vendor. Also include any notes regarding contact information in the text box.

"Transfer Notes" can be edited in various stages of the transfer: while the transfer is in the status of "New," "Pending Approval," or "Submitted" (for Site-to-Site Transfers or Site-to-Warehouse Transfers), and while the transfer is in the status of "New," "Pending Approval," "Submitted," "Delayed," or "Scheduled" (for Warehouse-to-Site Transfers).

11. Click  **Save**. A "Transfer Notes Saved" message displays.
12. Click  **Submit Transfer** at the top right side of the "Initiate Transfer" window, located in the "Actions" section. This puts the transfer in the status of "Pending Approval."
13. Click on Yes to have the ticket sent for pickup. If the items are being taken to the new location by your department or IT and will not need Motor Pool or the Vendor to pick up, click on No.
13. Click  **Print Transfer Ticket** if a printed ticket is desired.
14. Click on  **Close** to close the "Initiate Transfer" window.