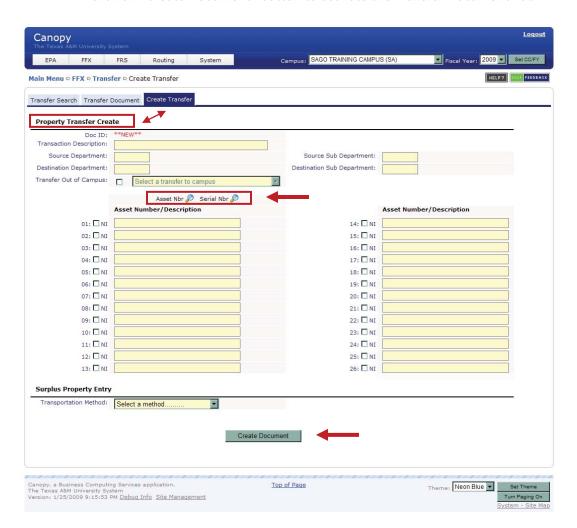# INTRA-Member Transfers (TDP Documents Within a Member)

The first step is creating the transfer document with header information.

1. **Create** the INTRA-Member TDP Document:

    -   Click on FFX TAB -> Transfer -> Create Transfer
    -   Type a **Description** for the transfer document
    -   Type the **Source Department** and, optionally, a **Sub-Department**
    -   Type the **Destination Department** and, optionally, a **Sub-Department**
    -   Click on the Search 'Light bulbs' to select assets or type in the Asset Number(s)
    -   Click on "Create Document" button to activate the Transfer Document Tab
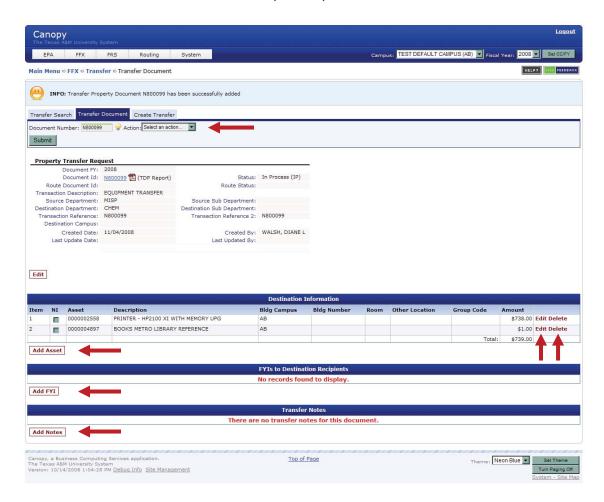
2. **Edit** the INTRA-Member TDP Document

The TDP document is now created and open for you to edit with additional information. To make changes to the Header information, click the 'Edit' button beneath the section. This opens the fields that you can change. Be sure to click the 'Save' button when finished.

- As desired, you can:
  - o **add** assets using the '**Add Asset**' button (bottom of *Destination Information* section)
  - o **remove** assets using the '**Delete**' link on the right of each asset
  - o **change** some of the asset fields using the '**Edit**' link on right of each asset

    Non-Inventory assets cannot be edited

- You can add FYIs for additional routing using the '**Add FYI**' button (bottom of *FYIs To Recipients* section
- You can add Notes to the document using the '**Add Notes**' button (bottom of *Transfer Notes* section
- When finished with your edits, choose an '**Action**' using the Drop-down List next to the document number: CLOSE, ROUTE, CANCEL
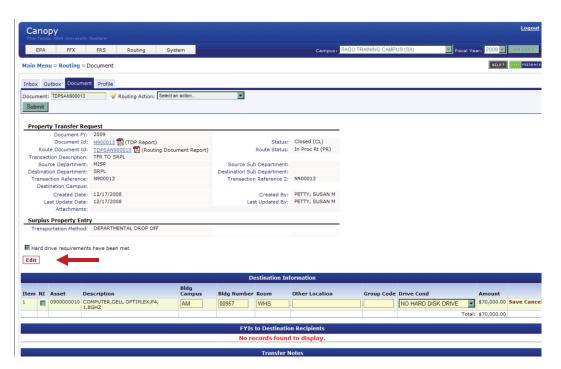
3. **Route** the INTRA-Member TDP Document
   TDP documents are created and submitted to routing by the Source Department. When the Source Department Signer approves the TDP, it routes to the Destination Department for approval. A specific TDP path can be set up at the Departmental level to route all TDP forms separately.

   All Approvers and Signers in the Routing Paths can change the Destination information. Access the document from your Inbox and click the **Edit** link which opens access to change the following fields:

building campus	other location
building room	user-group code

- When routing, the TDP follows the default path unless there is a specific path for the TDP form. In that case, it follows the TDP path.
- When the Source Department Signer has approved the TDP, the document routes to the Destination Department.
- If applicable, Executive Level routing will be done after Departments have given approval.
- All TDP documents advance to the Property Processing Office. Within the Property Office, the document follows either the default path or an Auto-Approval path.
- With final approval in the Property Processing Office, routing is complete and the transfer is posted to FAMIS Fixed Assets. The transaction can be seen on the FFX transaction page in CANOPY or on Screen 523 in FFX.
- As an Approver, you must use CANOPY to make edits to the TDP document. However, Screen 910 in FRS can be used to approve TDP documents without making changes.