**AssetWORKS**

Quick Reference Guide

This is an abbreviated guide for using the new Surplus Property system by AssetWorks. For additional information or details, please refer to the full manual on the PACS Surplus Property Website (http://pacs.arizona.edu/surplus).

Overview

Log In

1. Navigate to http://pacs.arizona.edu/surplus and click **AssetWorks** at the bottom right.
2. If prompted, enter your NetID and password and click **OK** on the confirmation page.
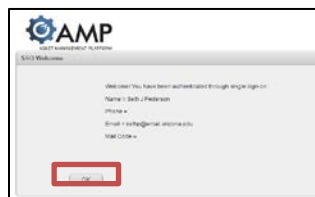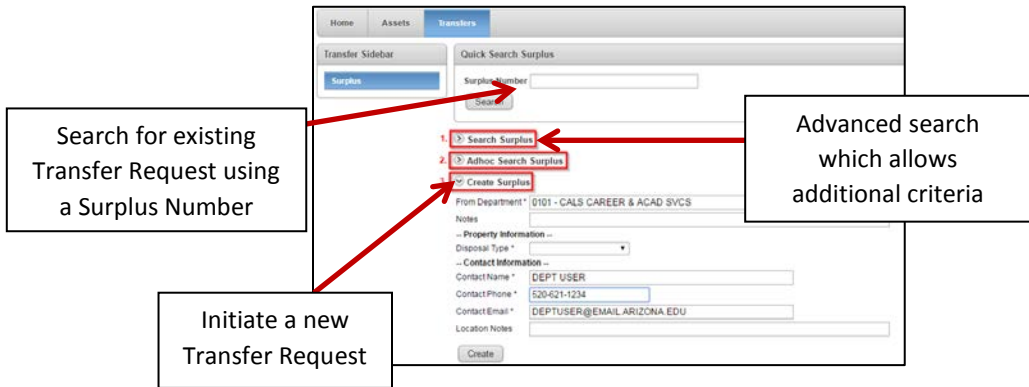

Searching, Viewing/Updating Assets, and Reports

- **Quick Search** – Enter a partial or complete Surplus or UA Asset Tag Number and click **Search** to view results
- **Advanced Search** – Advanced search allows for a more detailed query. Results can be saved into a report using multiple formats for later review.

Enter Transfer Requests (formerly known as a Disposal Request)

Allows Department Users and Approvers to search for or initiate new Transfer Requests, but they will only see assets owned by their department(s). Every time a Transfer Request is created, it's given a unique number for tracking.

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Search for existing Transfer Request using a Surplus Number

Advanced search which allows additional criteria

Initiate a new Transfer Request

To create a Transfer request:

1. Click on the **Transfers** tab.
2. Select the ⊙ icon next to **Create Surplus**.
3. Review the pre-populated information, make corrections if needed.
4. Add notes for internal department use, if needed. Note: PACS Drivers do not see these.
5. Click **Create**.
6. Review the Surplus Detail information. If needed, click **Edit** to make changes.
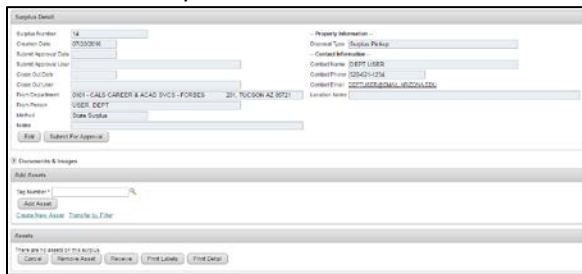

7. Specify the assets to be transferred using one of the following methods:
   a. Tagged Assets (data is pulled from UAccess Financials into the Surplus system):
      i. In the Surplus Detail screen, under Add Assets, enter all or part of the Tag number.
      ii. Select the appropriate asset and click **Add Asset** to view information pulled from UAccess Financials.
      iii. Repeat for each asset to be transferred.
   b. Non-Tagged Assets (items such as chairs or desks that are not tagged and are manually entered into the Surplus system when sent to Surplus):
      i. In the Add Assets section, click the **Create New Asset** link.

Create several of same asset

Done creating this new asset

Create new asset type in same bldg
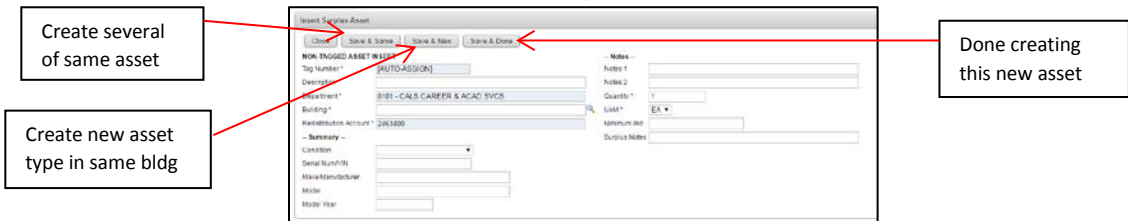
      ii. Enter the asset details.

iii. In the Surplus Notes, add information to help locate the item, as well as any contact or pickup information that the driver will need. Note: If the information is different for each item, Surplus Notes must be filled out for each item being sent to Surplus.

iv. Use the appropriate **Save** option at the top.

c. Review the Assets and remove any assets listed that should not be included.
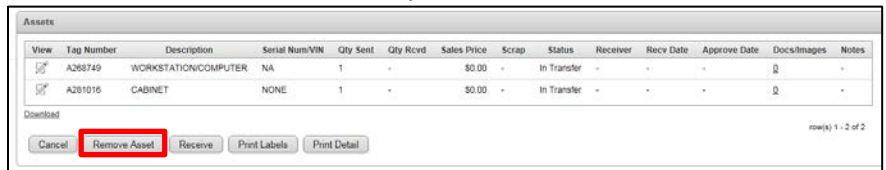
d. If any assets are Federally Owned or Titled (meaning it has an Agency Code of 55062, 55065, 55068, 55071, 55077, or 56092), it must be flagged for review by Sponsored Projects.

i. Select the ✎ icon next to the asset which must be submitted for review.

ii. In the Surplus Asset Line Detail screen, click on the Tag Number

iii. In the Asset Detail, click on the ✉ icon next to the Agency Code Approval field.

iv. In the drop down menu, select **Waiting for Approval**, and provide a reason for the change request. You will not be able to save until you've entered a reason.

v. Save the Asset Detail.
Note: Sponsored Projects will receive an e-mail and approve the request.

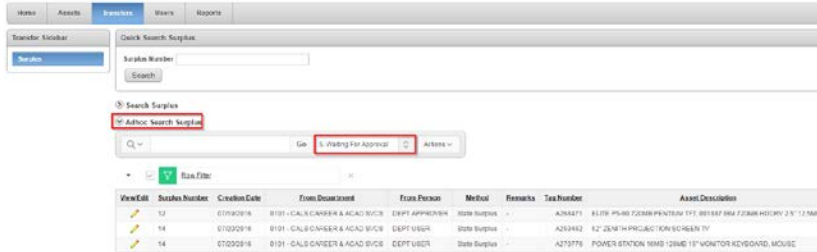e. Once the Transfer Request is complete, go to the Surplus Detail section and click **Submit for Approval**.

Note: The Department Approver will receive an e-mail to review and approve the request.
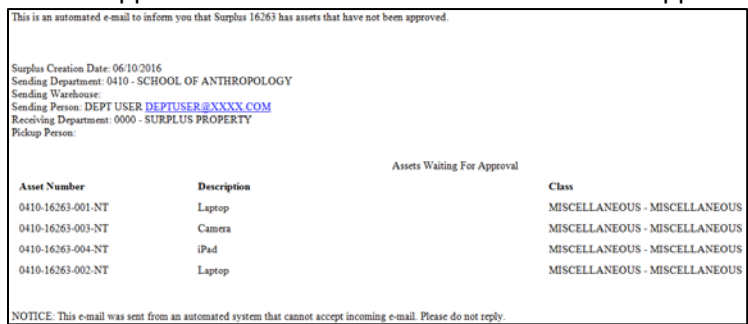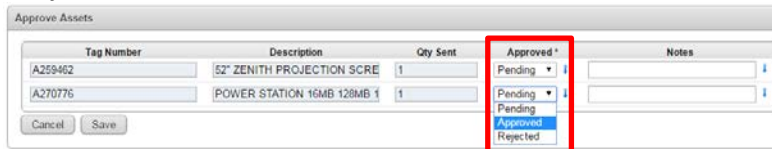
To approve a Transfer Request:

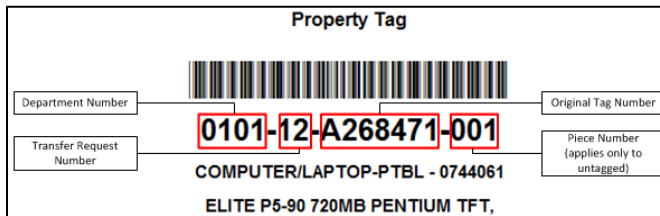1. On the Transfers tab, select **Adhoc Search**.

2. Set the filter to **5. Waiting for Approval**.
3. Click on the **View** ✎ icon for the asset.
4. In the Asset section, click **Approve** at the bottom.

5. In the Approved column, update each asset to mark them Approved or Rejected.
   a. If rejected, add a reason to the Notes field.

6. Click **Save**, which will update the status to "In Transfer" and add an approved date to the asset.
7. Once approved, the Surplus system will issue its own tag number which can only be searched for or tracked in the Surplus system.

Note: To check the status of a Transfer Request, use the Adhoc Search Surplus option in the Transfers tab. See the full manual for an overview of each available report.

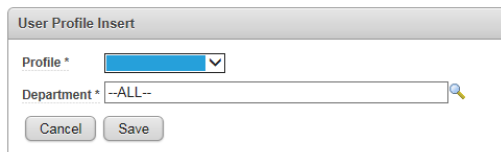## Add User Profiles (Department Approver Only)

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Users will automatically be linked to their home department in the system. Department Approvers can add additional departments to a Department User's profile if the department is within their approval authority.

Adding Users to Your Department

1. Select the **User** tab and search for the profile that needs to be updated.
2. Click the View ✎ icon to review the User Detail.

3. Click the **Add Profile** button.
4. Select the User Profile and find the department to be added from the drop down list.

5. Click **Save**.

Note: Department Approvers cannot add users from outside their departments or remove a user from a department. Contact Surplus Property staff with a detailed e-mail for assistance.