

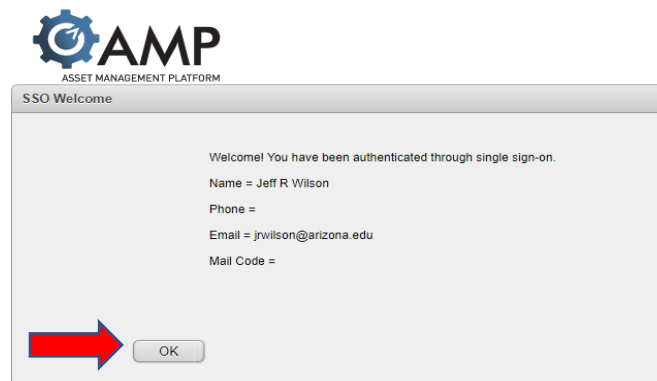
## Quick Reference Guide

This is an abbreviated guide for using the new Surplus Property system by AssetWorks.

### Overview

Log In

1. Navigate to <https://financialservices.arizona.edu/> use the drop-down menu for SURPLUS and select AssetWorks.
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 Surplus Request (formerly known as a Transfer)

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

To create a Surplus request:

1. Click on the **Surplus** tab.

2. Select Create.
3. Review the pre-populated information, make corrections if needed.
4. Add notes for internal department use, if needed. Note: Surplus drivers do not see these.
5. Select Disposal Type.
6. Review the Terms and Conditions, check the box agreeing to the terms and conditions and click create .

The screenshot shows the 'Create Surplus Transfer' form. On the left is a navigation menu with 'Surplus' and 'Create' highlighted by red arrows. The main form contains the following fields and sections:

- From Department \***: 7801 - PROCUREMENT & CONTRACTING SVCS
- Notes**: Text input field.
- Property Information --**:
  - Disposal Type \***: Department Drop Off (indicated by a red arrow)
- Contact Information --**:
  - Contact Name \***: JEFF R WILSON
  - Contact Phone \***: (520) 621-3062
  - Contact Email \***: QA@INCIRCUIT.COM
- Terms and Conditions**:
 

Prior to sending department property to surplus, please verify that the property meets the following criteria:

  - 1) All sensitive data and software has been removed from computer equipment
  - 2) Equipment does not contain any radioactive materials, hazardous material or PCP and is not biologically contaminating
  - 3) The equipment is cleared of federal requirements and has been approved for disposal. If the property has been purchased:
    - The equipment is owned by UA.
    - The estimated sales value is less than \$5,000.
    - The equipment is not accountable to an active award.
    - The equipment is not needed by other federally funded research.
    - Contact SPS Property Manager if the criteria above are not met

Please check the box below to confirm that you have read and agree to the above terms and conditions. If you have a
- I have read and agree to the above terms and conditions.**
- Create** button (indicated by red arrows)

7. Specify the assets to be transferred using one of the following methods:
  - a. Tagged Assets (data is pulled from UACccess Financials into the Surplus system):
    - i. In the Surplus Detail screen, under Add Assets, click on the menu and 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 tagged asset to be transferred.

The screenshot shows the 'Add Assets' form. It contains the following elements:


- Tag Number \***: Text input field with a dropdown menu icon (indicated by a red arrow).
- Add Asset** button
- Create New Asset** button
- Transfer by Filter** button


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A197518 Search Close

A197518 - FREEZE DRYER/TISSUE

**Add Assets**


Tag Number \* A197518 - FREEZE DRYER, 

**Add Asset** 


**Create New Asset** **Transfer by Filter**

- 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. Under the Add Assets section, click the Create New Asset link.

**Add Assets**

Tag Number \*  


**Add Asset**

 **Create New Asset** **Transfer by Filter**

- ii. Enter asset details including Description, quantity, search and select building.

**NON-TAGGED ASSET INSERT**

Tag Number \* [AUTO-ASSIGN]

Description  Chairs

Department \* 7801 - PROCUREMENT & CONTRACTING SVCS

Building \* 300A - USA WEST

Redistribution Account \* 7801 - 1781100 - PREFERRED ACCOUNT - CREDIT


**-- Summary --**

Condition

**-- Notes --**

Notes 1

Notes 2

Quantity \* 5 

UoM \* EA

Minimum Bid

Surplus Notes

- 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 bottom.

**Insert Surplus Asset**

**NON-TAGGED ASSET INSERT**

Tag Number \* [AUTO-ASSIGN]

Description Desk

Department \* 7801 - PROCUREMENT & CONTRACTING SVCS

Building \* 300A - USA WEST

Redistribution Account \* 7801 - 1781100 - PREFERRED ACCOUNT - CREDIT

**-- Summary --**

Condition

Serial Num/VIN

Make/Manufacturer

Model

Model Year

**-- Notes --**


Notes 1


Notes 2

Quantity \* 1

UoM \* EA

Minimum Bid



Surplus Notes 



Back Save & Same Save & New Save & Done Save & Add Images


- c. Review the Assets and remove any assets listed that should not be included.

**Assets** Documents & Images History

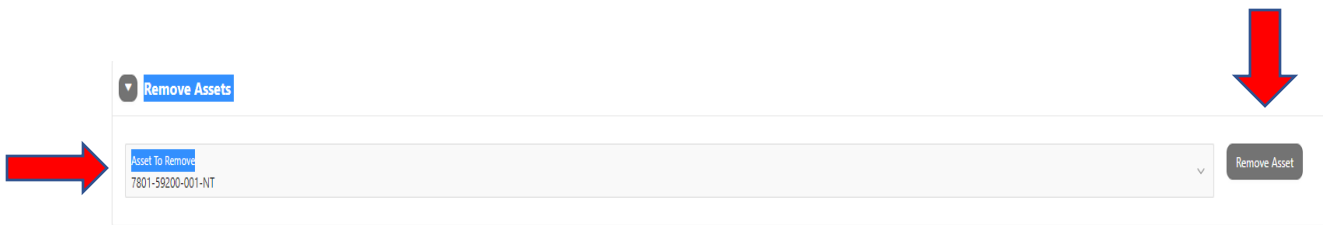
| View  | Tag Number        | Description         | Serial Num/VIN | Qty Sent | Qty Rcvd | Sales Price | Scrap | Status      | Receiv |
|---|-------------------|---------------------|----------------|----------|----------|-------------|-------|-------------|--------|
|  | 7801-59197-001-NT | Desk                | -              | 1        | -        | \$0.00      | -     | In Transfer | -      |
|  | A197518           | FREEZE DRYER/TISSUE | TFD1181194     | 1        | -        | \$0.00      | -     | In Transfer | -      |

Download

row(s) 1 - 2 of 2

Back **Remove Asset**  Print Labels Print Detail

- i. Click in the asset to remove box and select which asset you would like to remove and click Remove Asset.



- 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 mail 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 Surplus request is complete, go the surplus detail section and click Submit for Approval.

|                      |                                       |
|----------------------|---------------------------------------|
| Surplus Number       | 59197                                 |
| Creation Date        | 11/16/2022                            |
| Submit Approval Date |                                       |
| Submit Approval User |                                       |
| Close Out Date       |                                       |
| Close Out User       |                                       |
| From Department      | 7801 - PROCUREMENT & CONTRACTING SVCS |
| From Person          | WILSON, JEFF R                        |
| Method               | State Surplus                         |
| Notes                |                                       |

**To approve a Surplus Request:**

1. If you know the transfer number you can enter it on the home screen and hit search.

**Quick Search**


Tag Number

Transfer Number 

- If you don't have the number select the Surplus tab and set the filter to **6. Waiting For Approval** and select **Go**.

**Adhoc Search Surplus Transfers**



Creation Start Date  
11/16/2022

Submit 

6. Waiting For Approval

- Click on the view icon for the transfer number.
- In the Asset section, review the assets and click **Approve** at the bottom.

**Assets** Documents & Images History

| View  | Tag Number        | Description         | Serial Num/VIN |
|---|-------------------|---------------------|----------------|
|  | 7801-59197-001-NT | Desk                | -              |
|  | A197518           | FREEZE DRYER/TISSUE | TFD1181194     |





Download



row(s) 1 - 2 of 2



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

**Approve Assets**

| Tag Number        | Description         | Qty Sent | Approved *  |
|-------------------|---------------------|----------|---|
| 7801-59197-001-NT | Desk                | 1        | Pending   |
| A197518           | FREEZE DRYER/TISSUE | 1        | Pending   |

6. The assets status will be updated to “in Transfer” and an approved date will be added to the asset. Surplus property will contact you with a pickup date.