

# Surplus

Surplusing is the mandatory means of disposing of items (capital and non-capital) that are no longer needed. AIMS (Asset Inventory Management System) provides departmental users with the capability to surplus items. All of the functions and associated lists are accessed via the Surplus Menu (SM).

The surplus process requires the following three steps:

1. Create a surplus pickup batch (**SPB**)
2. Add items to your surplus pickup batch (**SA**)
3. Submit your surplus pickup batch for approval (**SPBA**)

This document does not include a step-by-step process. To go to the next field referenced: either the cursor will automatically go to the next field if the data you entered “filled” the field or you will need to press your tab key. To mark or select an item when using a help facility enter an “x” in the highlighted box and press enter. The information will be automatically populated in the field.

**Serial Number Validation** - When you enter a serial number, the system validates that serial number is unique. If that serial number is used on an existing asset, you will receive a warning indicating that the entered serial number is a duplicate. Please go to **LASN (List Assets for a Serial Number)** to make sure that the asset doesn't already exist in AIMS. It may be a tagged asset that you were attempting to enter as an untagged item. If this serial number matches an existing asset, please use the appropriate tag number when surplusing it. If the serial number doesn't match the existing asset, please continue the process of surplusing this item on SA by ignoring the system warning.

## How to Create a Surplus Pickup Batch

**First step - SPB (Surplus Pickup Batch)** provides the facility for creating and viewing a surplus pickup batch. The key field is Action (**Add**). Security by value restrictions are applied such that the operator must be authorized for the Asset BU.

- **BU** enter your budgetary unit or press **PF1 (Help)** to find your BU.
- **Employee ID** enter the ID of the surplus employee contact. Press **PF1 (Help)** to find the surplus employee's ID using a name search.
- **Phone Number** enter phone number of the contact person.
- **Campus Address** enter campus address of contact person.
- **Notes** optional notes field.

Press **PF10 (Save)** to create the new surplus pickup batch. The system assigns a new pickup batch number that you will use when adding items to the batch.

## How to Add Items to a Surplus Pickup Batch

**Second step - SA (Surplus Asset)** provides the facility for adding items to a surplus pickup batch. The key fields are Action (**Add**) and Control No (for tagged assets: red or blue, prefix the tag number with a T). For capital assets, you must enter the tag number. Security by value restrictions are applied such that the asset must be in the same Asset BU as the BU on the Surplus Pickup Batch.

## Adding surplus items not in AIMS:

On SA (Surplus Asset) with an Action of A (Add) along with a **blank or zero value in the Control No field** and the correct surplus batch number, press enter. Upon initiation of this action, a window opens where the **surplus item description** is selected using the suggested pick list or entered manually using the **Other** field. Press **PF10 (Save)** which returns you to the SA (Surplus Asset) screen.

- **Make** enter the brand or manufacturer of the asset. Required for all electronic items.
- **Located in Room Tag No** enter the room tag number where the asset will be located when picked up by Surplus Warehouse. Press **PF1 (Help)** for a list of rooms for a specified building. Most rooms have a barcode with this Room Tag Number affixed to the doorway.
- **Model** enter the manufacturer's assigned style, type, or version. Required for all electronic items.
- **SN (Serial Number)** enter the manufacturer's assigned serial number. Required for all electronic items.
- **Condition** enter the condition of the asset. Press **PF1 (Help)** for possible condition codes.
- **Quantity** enter the number of items. All electronics must be entered one at a time. **Note:** Multiple quantities are only allowed for chairs, carts, and miscellaneous items such as keyboards, cables, speakers, and mice. When surplusing cables, mice, speakers, or keyboards, you can put these items in a box or multiple boxes. In the **Make** field, type "Box" or "Boxes" and indicate the number of boxes in the quantity field.
- **Pre surplus action** enter the pre-surplus action. Press **PF1 (Help)** for possible pre-surplus actions. This is where you designated what type of action was taken based upon the type of asset. For computer and laptop, indicate whether you DOD wiped the hard drive, kept or removed the hard drive, or want Surplus to remove the hard drive. For desks, file cabinet, storage cabinet, bookcase, or credenza, you must certify that the item is unlocked and empty. For PDAs or cell phones, you must certify that the memory has been cleared. If no action is necessary, indicate with an **N**.
- **Certified by** enter the person who performed the pre-surplus action. Required for certain types of pre-surplus actions codes.
- **Notes** optional notes field.

Press **PF10 (Save)** to add the surplus asset to the pickup batch. System assigns a control number to the surplus asset with a *Surplus-Asset-Status* of P (Pending). This number will be used on the labels that the Surplus Warehouse manager sends to you.

**To add another non-AIMS item to your batch, blank out the system assigned number in the Control No field and press enter.**

## Adding Tagged assets already in AIMS:

If the asset already exists in AIMS, the control number or tag number is entered along with an Action of A with the correct surplus batch number. (On this screen in the **Control No** field, the tag number must be prefixed with a T.) Press enter. Upon initiation of this action, a window opens where the **surplus item description** is selected using the suggested pick list or entered manually using the **Other** field. Press **PF10 (Save)** which returns you to the SA (Surplus Asset) screen where the identifying information for the asset is displayed along with the entry fields required for surplusing.

- **Located in Room Tag No** enter the room tag number where the asset will be located when picked up by Surplus Warehouse or leave the existing room if appropriate. Press **PF1 (Help)** for a list of rooms for a specified building. Most rooms have a barcode with this Room Tag Number affixed to the doorway.
- **Condition** enter the condition of the asset. Press **PF1 (Help)** for possible condition codes.
- **Pre surplus action** enter the pre-surplus action. Press **PF1 (Help)** for possible pre-surplus actions. This is where you designated what type of action was taken based upon the type of asset. For computer and laptop, indicate whether you DOD wiped the hard drive, kept the hard drive, or want Surplus to remove the hard drive. For desks, file cabinet, storage cabinet, bookcase, or credenza, you must certify that the item is unlocked and empty. For PDAs or cell phones, you must certify that the memory has been cleared. If no action is necessary, indicate with an **N**.
- **Certified by** enter the person who performed the pre-surplus action. Required for certain types of pre-surplus actions codes.
- **Notes** optional notes field.

Press **PF10 (Save)** to add the surplus asset to the pickup batch. Once a tagged asset has been added to a Surplus Pickup Batch, the *Asset-Status* is changed to AQ (Asset Queued for surplus) and the *Surplus-Asset-Status* is set to P (Pending).

*To add another AIMS item to your batch, blank out the Control No field and enter the tag number in the Control No field. To add non-AIMS item to your batch, blank out the control number in the Control No field and press enter.*

## Removing Items from a Surplus Pickup Batch

To remove or withdraw an item or asset from a surplus pickup batch - on SA (Surplus Asset) with an Action of **W (Withdraw)** and the control number or tag number in the Control No field, press enter. Press **PF10 (Save)** to remove (or withdraw) the surplus asset from the pickup batch. **Note:** once an asset has been removed from a pickup batch, it cannot be added back to the same pickup batch. You'll need to create another surplus pickup batch for which to add it.

## Updating items in a Surplus Pickup Batch

To update an asset or item in a surplus pickup batch – on SA (Surplus Asset) with an Action of **U (Update)** and the control number or tag number in the Control No field, press enter. Make any necessary changes. Press **PF6 (SDesc)** to change the surplus description. Press **PF10 (Save)** to save your changes.

## How to Submit a Surplus Pickup Batch for Approval

**Last step - SPBA (Surplus Pickup Batch Approval)** provides the facility for submitting a surplus pickup batch for approval by management and surplus warehouse manager. The key fields are Action (**Submit**) and Surplus Batch number. Press **PF10 (Save)** to submit the surplus pickup batch for approval. The surplus warehouse manager, the departmental contact, and department head or director must approve this transaction.

## How to View Items in a Surplus Pickup Batch

**LSB (List Surplus assets for a Batch)** lists items in a surplus pickup batch by batch number.

## How to View Surplus Pickup Batches for an Employee

**LBSE (List Batches for a Status and Employee)** lists surplus pickup batches for an employee by status.

## What happens after the Surplus Pickup Batch has been approved

Reports and labels are sent to the departmental contact that is responsible for affixing the labels to the correct items.

The Surplus Manager will schedule a time for pick up of the items. When items are picked up, the departmental contact must sign a copy of the report verifying what items were picked up. After items have been received at the Surplus Warehouse, the budgetary unit for all inventory items will be changed from the department's BU to the surplus warehouse's BU. These items will no longer be the responsibility of the surplus department. Items received at the Surplus Warehouse are either held for recycling back on campus, sold by sealed bid, scrapped, or sold through public auctions.

If there were items in the surplus pickup batch that weren't picked up and received at the warehouse, an email is sent to the departmental contact informing them of the items that were not picked up.

## How to Track the Status of a Surplus Pickup Batch

**SPB (Surplus Pickup Batch)** provides the facility for tracking the status of a surplus pickup batch. The key fields are Action (View) and Surplus Batch number. The *Surplus-Pickup-Batch-Status* below the banner let's you know whether your surplus pickup batch is in process, submitted for approval, approved, pickup pending, moved to the warehouse, or complete (the auction is over).

Press the **PF4 (DCode)** to see the statistical information related to your batch. You can see the number of items: pending, withdrawn from a batch, not picked up, received at the warehouse, disposed of at the warehouse, transferred out of the warehouse, or surplus via auction.

## After the Auction is complete

After the auction, a batch job will perform the final update for all the items in the auction. For all items or assets in the surplus batch, the Surplus-Asset-Status is changed from **R (received at the warehouse)** to **S (surplused via auction)**, For tagged assets, the Asset-Status changed from **AQ** to blank, the Disposition-Code set to **S** (Surplus), and Date-Disposed set to the auction date.