



*Surplus Property
Management System*

User Training Manual

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1.0 Surplus Property Management System Overview

Under the university asset management structure, departments and colleges are responsible and accountable for asset utilization and determining when assets are no longer of value or use. University property which is taken out of service by the department or college must be transferred to another department, donated to a 501(c)(3) charitable organization or released to Surplus Materials Disposal (“Surplus”) by the Dean or Vice President or his/her designee. When items are released and delivered to Surplus, responsibility and accountability for the property is transferred from the department or college to Surplus for final disposition.

To release items to Surplus, a Disposal Request must be completed in the automated Surplus Property Management System (SPMS). Disposal Requests must be initiated and approved by authorized individuals within the department or college. Use of this system to dispose of surplus property is mandatory. System user training is provided by Surplus and is required for new users.

This manual describes the Surplus Property Management System and what steps to follow to initiate, approve and view a Disposal Request. If you have questions regarding this system, please contact the Surplus Property Office at Surplus@osu.edu or email the Systems Development help desk at Help.Desk@ctrl.ohio-state.edu

2.0 How to Obtain Access to the System

If you do not already have access to the system, you can find the access forms and instructions on how to obtain access to the system on the Office of the Controller forms page: <http://www.ctrl.ohio-state.edu/form/form.shtm>

3.0 Logging into the System

To log into the Surplus production environment, open your internet browser and go to the following website: <http://www.ctrl.ohio-state.edu/su/default.aspx> . If you want to log into the test environment, go to [https:// SurplusQA.ctrl.ohio-state.edu/su/default.aspx](https://SurplusQA.ctrl.ohio-state.edu/su/default.aspx).

When you type in one of the web addresses listed above, you are directed to the OSU Internet Username login page (see figure 1).

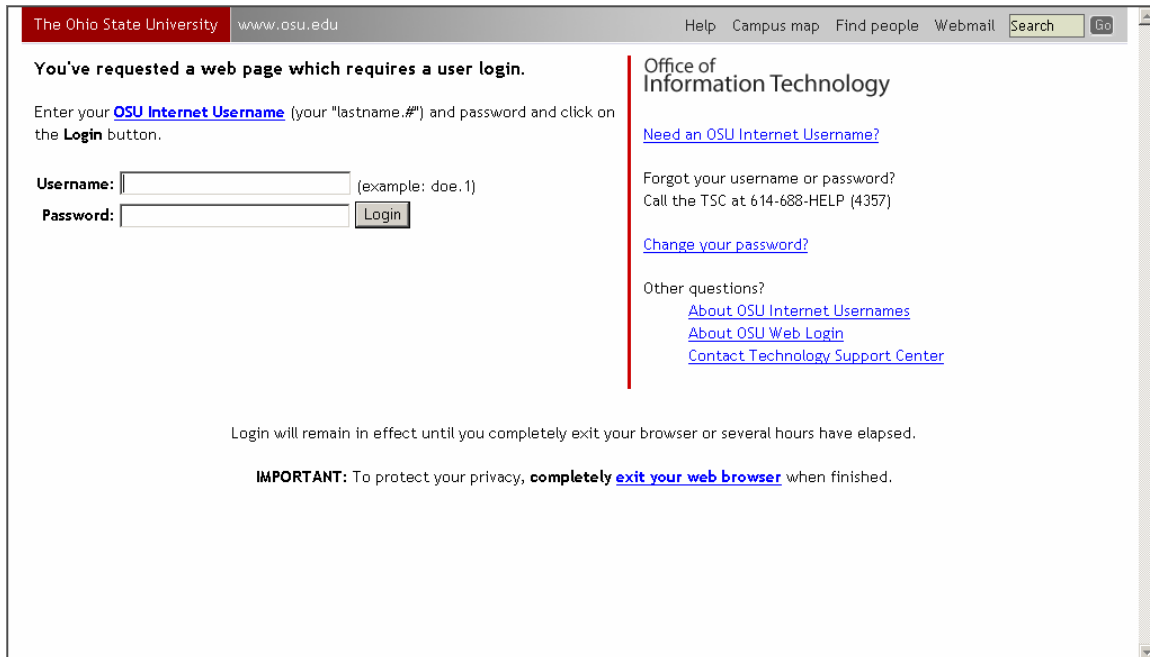


Figure 1 - OSU Internet Username Login Page

Enter your OSU Internet Username (name.n) into the Username field, type your password into the Password field and then click on the “Login” button. If necessary, please call 8-HELP to have your password reset.

Once you have successfully entered your Username and password, you will either be logged directly into the system (if you have access to only one department), or you will be provided with a list of departments that you have access to (see figure 2). Choose the department you want, and then click on the “Continue” button. If you do not have access to the system, you will see a screen similar to figure 3. See section 2.0 to find out how to obtain access to the system.



Figure 2 - Department Selection Page

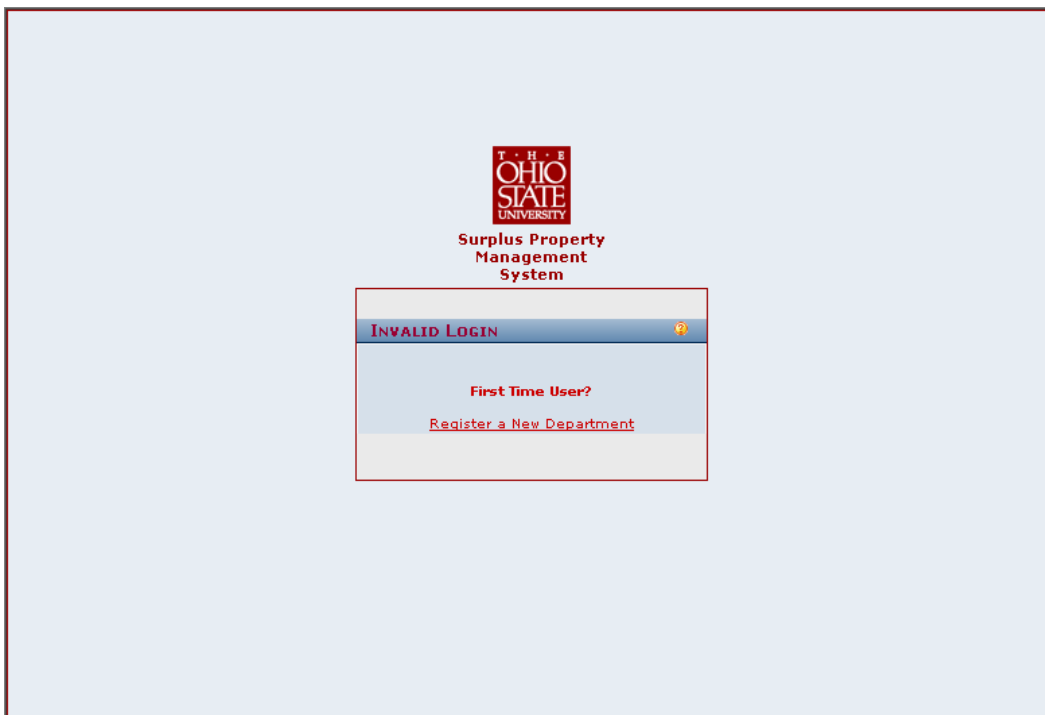


Figure 3 - Access Denied Page

4.0 Logging out of the System

To log out of the System, click on the **Log Out** menu item, then close your browser window by clicking on the **X** button in the top right-hand corner of the screen.

5.0 To Do List Page

When you log into the system, the first page that opens is the To Do List (see figure 4). As you create Disposal Requests, reminders to have them authorized appear in the list. Similarly, other actions in the system create appropriate To Do List entries. Once you have completed a To Do List task, check the checkbox in its row and it will disappear from the list the next time you refresh this page (or click the **Refresh** button at the bottom of the page to remove the checked rows at once).

The screenshot displays the 'To Do List' page of the Surplus Property Management System. On the left, the Ohio State University logo is visible, along with the system name and the user 'Dana Brentlinger'. A navigation menu includes 'To Do List', 'Departments', 'Inventory', 'Accounting', 'FAQs', 'Help', 'Icons Legend', and 'Log Out'. The main content area features a table with the following data:

<input checked="" type="checkbox"/>	Task Type	Date	Page	Item
<input type="checkbox"/>	Authorization	03/26/2008	Disposal Requests	Authorization required for DR# 10352 (by Troy Test).
<input type="checkbox"/>	Authorization	03/10/2008	Disposal Requests	Authorization required for DR# 10221 (by Dana Test).

At the bottom right, it indicates 'Total Records: 2' and provides 'Print' and 'Refresh' buttons.

Figure 4 - To Do List page

6.0 Department Profile

To access the Department Profile page (see figure 6) click on the **Departments** menu item, and then the **Department Profile** sub-menu item.

The page is split into two sections. The top half of the page shows department information. To find out how to edit department information, see section 6.1.

The bottom of the page shows a list of users who have access to this department. You can edit only your own information. To learn how to edit your personal profile, see section 6.2.

To send a message to another user, click on the email icon (✉) for that user.

Use the **Print Signature Report** button to bring up a report listing all users who have Disposal Request approval authority for the department listed on the Department Profile page.

OHIO STATE UNIVERSITY
Surplus Property Management System
 Logged in user:
 Dana Brentlinger

DEPARTMENTS : DEPARTMENT PROFILE
 Add|Edit

Department Name	Short Name	Dept.#	Parent Department	Approved	Notes
Dana's Test Department	MyOrg	00034	Business and Finan	<input checked="" type="checkbox"/>	

Building Name	Bldg.#	P.O.Box	Address	City	State	Zip	+4	Main
Mount Hall	0311		1050 Carmack Road	Columbus	OH	43210		<input checked="" type="checkbox"/>

Phone Number	Ext.	Phone Type	Main	Type	Account	Org	Fund
614		Dept. Main Phone	<input checked="" type="checkbox"/>	Select:			
(614) 555-5555		Dept. Main Phone	<input checked="" type="checkbox"/>	Function	Project	Program	User Defined
				Credit	64416	00033	011000

Edit Save Cancel

Department Users Add|Edit User

A	Sal.	First Name	Last Name	Title	Security Level	Phone	Email
<input checked="" type="checkbox"/>		Mrs. Dana	Brentlinger	Test	User	(614) 247-8619	✉
<input checked="" type="checkbox"/>		Mrs. Dana	Test	Test admin	Administrator	(614) 555-5555	✉
<input checked="" type="checkbox"/>		Mrs. Patricia	Test	Test man...	Manager	(614) 555-5555	✉
<input checked="" type="checkbox"/>		Mr. Troy	Test	Test user	User	(614) 555-5555	✉

Total Records: 4

Print Signature Report

Figure 5 - Department Profile Page

7.0 Disposal Requests

To load the Disposal Requests page, click on the **Departments** menu item, then click on the **Disposal Requests** sub-menu item. This page is used to enter and edit Disposal Requests.

7.1 Disposal Request Search Page Overview

To display the Disposal Request Search page, click on the Disposal Requests sub-menu item. The Search page displays all Disposal Requests pending approval (see figure 7).

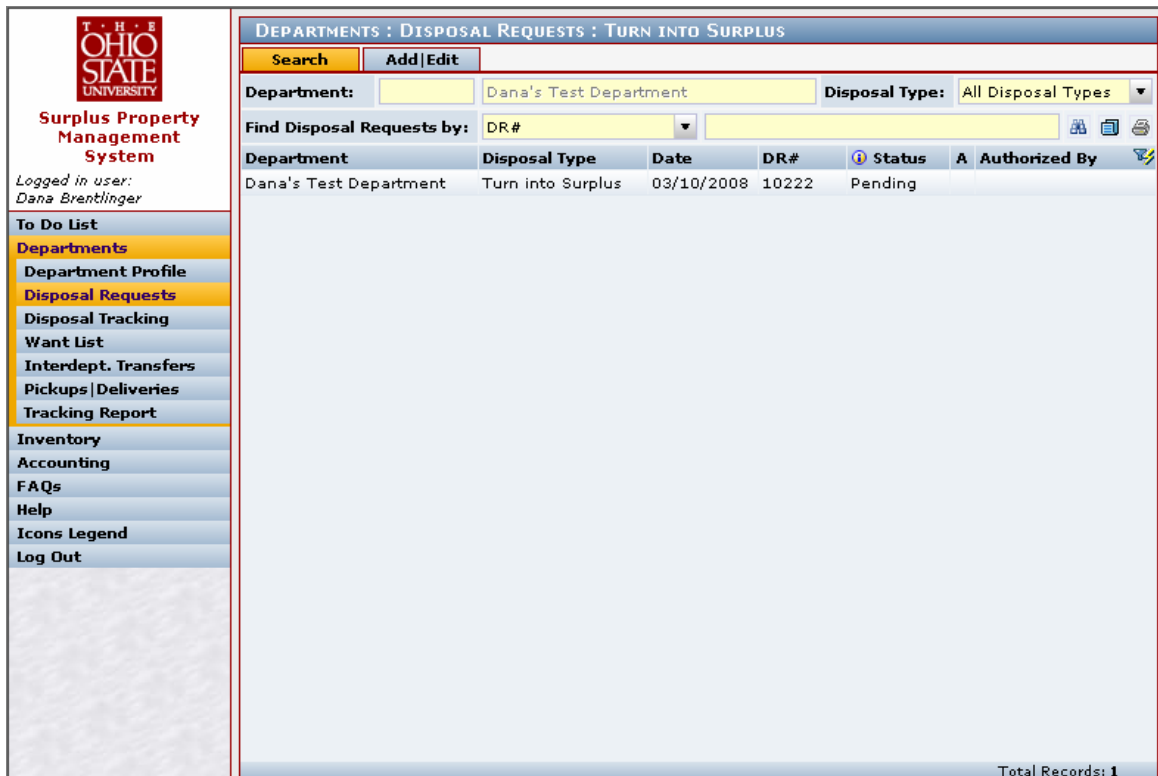








Figure 7 - Disposal Request Search Page

Description of Fields on the page:


- Department Search Box: This field is grayed out. It defaults to the Department that you selected when you logged in.
- Disposal Type: This drop-down menu has the following options:
 - All Disposal Types: This is the default option and does not limit your search by Disposal Type.

- Turn into Surplus: This option limits your search to Turn into Surplus Disposal Requests.
- Interdept. Transfer: This option limits your search to Interdepartmental Transfer Disposal Requests.
- Special Bid Sales: This option limits your search to Special Bid Sales Disposal Requests.
- Find Disposal Requests By: This drop-down menu is a list of search options that you can choose from. Select the appropriate search option from this list and then enter the search term in the text box to the right of this drop-down menu. The different search options are listed below:
 - DR#: This option searches by Disposal Request number. Enter the Disposal Request (DR) number in the search box on the right and then click on the search icon ().
 - Date: This option searches for Disposal Requests entered between two dates. Enter the From and To dates in the text boxes and then click on the search icon (.
-  - This is the search icon. When you click on it, it searches the term you have placed in the search text box.
-  - This is the Show All icon. When you click on it, all Disposal Requests display in the search results area on the screen.
-  - This is the print icon. When you click on it, a print preview window opens that shows the items currently listed in the search results section on the screen. To print this print preview, select file → print.
-  - This is the filter icon. When you click on it, filter boxes appear below the column headings in the search results section on the screen. If this icon is clicked again, the filter boxes are removed from the screen.
- **Department** - The Department column in the search results section lists the name of the Department that entered the Disposal Request (every Disposal Request in the list will show the same department name).
- **Disposal Type** - The Disposal Type column in the search results section lists the Disposal Type of a Disposal Request. Available values are Turn into Surplus, Interdept. Sales and Special Bid Sales.
- **Date** - The Date column in the search results section shows the date each Disposal Request was entered.
- **DR#** - The DR# column in the search results section shows the Disposal Request numbers.
- **Status** - The Status column in the search results section, lists the current status of each Disposal Request. Available values and their meanings are listed below:
 - Pending: The Disposal Request has been entered and saved but has not been added to a manifest yet (pickup type of Surplus Property Office) or delivered to Surplus yet (pickup type of Self-Delivery).
 - In Progress: The Disposal Request has been added to a manifest (pickup type of Surplus Property Office).

- Completed: The items on the Disposal Request have been received by Surplus and added to the Surplus inventory.
- Cancelled: The line items on the Disposal Request were deleted instead of being received into Surplus inventory.
- Closed: The items on the Disposal Request have been received by Surplus and added to the Surplus inventory and the Disposal Request has been marked as closed by a departmental user on the Disposal Tracking page.

- **A** : The Approval column in the search results section contains a check mark if the Disposal Request has been approved. It will be empty if the Disposal Request has not been approved yet.
- **Authorized By** : The Authorized By column in the search results section contains the name of the person who will approve or has approved the Disposal Request.

7.2 Search for a Disposal Request by DR#

To search for Disposal Request by the Disposal Request number (DR#), select *DR#* from the *Find Disposal Requests by* drop-down menu, enter the DR# into the search text box and then click on the search icon (). The search results will be displayed in the search results section on the screen (see figure 8).

Note: You can only search for Disposal Requests that were entered by the Department that you selected when you logged in. Only the Surplus Property Office can search for Disposal Requests from all Departments.

THE OHIO STATE UNIVERSITY
Surplus Property Management System
 Logged in user:
 Dana Brentlinger

DEPARTMENTS : DISPOSAL REQUESTS : TURN INTO SURPLUS

Search Add/Edit

Department: Dana's Test Department Disposal Type: All Disposal Types

Find Disposal Requests by: DR # 10221

Department	Disposal Type	Date	DR#	Status	Authorized By
Dana's Test Department	Turn into Surplus	03/10/2008	10221	Completed	✓ Test Dana

Total Records: 1

Figure 8 - Disposal Requests Search Page - Searched for DR 10221

7.3 Search for a Disposal Request by Date

To search for a Disposal Request by the date entered, select *Date* from the *Find Disposal Requests by* drop-down menu, enter a From date and To date, then click on the search icon (🔍). The search results will be displayed in the search results section on the screen (see figure 9).

Note: You can only search for Disposal Requests that were entered by the Department that you selected when you logged in. Only the Surplus Property Office can search for Disposal Requests from all Departments.

OHIO STATE UNIVERSITY
Surplus Property Management System
 Logged in user:
 Dana Brentlinger

DEPARTMENTS : DISPOSAL REQUESTS : TURN INTO SURPLUS

Search Add/Edit

Department: Dana's Test Department Disposal Type: All Disposal Types

Find Disposal Requests by: Date From 03/01/2008 To 03/31/2008

Department	Disposal Type	Date	DR#	Status	Authorized By
Dana's Test Department	Turn into Surplus	03/26/2008	10352	Pending	Test Troy
Dana's Test Department	Turn into Surplus	03/10/2008	10222	Pending	
Dana's Test Department	Turn into Surplus	03/10/2008	10221	Completed	Test Dana

Total Records: 3

Figure 9 - Disposal Request Search Page - Searched by Date

7.4 How to Sort the Columns

To sort the columns on the Disposal Requests Search page, click on the column heading once to sort in ascending order and click on the column heading again to sort in descending order. An arrow appears to the right of the column heading to let you know if the column is sorted in ascending or descending order (see figures 10 and 11).

Department	Disposal Type	Date	DR#	Status ↓	Authorized By
------------	---------------	------	-----	----------	---------------

Figure 10 - All items are sorted by Status in ascending order

Department	Disposal Type	Date	DR#	Status ↑	Authorized By
------------	---------------	------	-----	----------	---------------

Figure 11 - All items are sorted by Status in descending order

7.5 How to filter the Search Results

To filter the search results, click on the filter icon (🔍). The filter text boxes will appear (see figure 12).

Department	Disposal Type	Date	DR#	↑ ⓘ Status	A Authorized By
		=			*

Figure 12 - Filter Text boxes are shown

To filter a column, enter the item you are looking for in the filter text box. The filter will apply to that column (see figure 13).

The screenshot shows the Ohio State Surplus Property Management System interface. The main content area displays a table of Disposal Requests with the following data:

Department	Disposal Type	Date	DR#	↑ ⓘ Status	A Authorized By
Dana's Test Department	Turn into Surplus	04/16/2008	10418	In Progress ✓	Test Dana
Dana's Test Department	Turn into Surplus	03/26/2008	10352	In Progress ✓	Test Troy

The search filter is set to 'Find Disposal Requests by: DR #' and the status filter is set to 'in'. The 'Status' column in the table shows 'In Progress' for both records. The total number of records is 2.

Figure 13 - Filter search results. Only Disposal Requests with a status containing the word “in” are displayed.

To remove a filter, delete the text in the filter box. All items will appear again.


Note: To remove a date filter, click on the clean icon (🗑️) located to the left of the year on the calendar.


To remove all the filter text boxes, click on the filter icon (🗑️). The text boxes will be hidden again.

7.6 Create a Disposal Request

To create a new Disposal Request, go to the Disposal Requests page (Departments → Disposal Requests), and then click on the **Add|Edit** tab.

This brings up the Add/Edit Disposal Request page. To create a new Disposal Request, follow the steps listed below:





Note: To cancel a Disposal Request at any time before saving it, click on the  button. After you have saved a Disposal Request it cannot be cancelled.


1. Click on the  button.
2. Select a Dept. Contact Person (this is the person who will be contacted for any questions regarding the Disposal Request).
3. Select a Disposal Type:
 - Turn Into Surplus: Select this Disposal type if you are planning to have the item(s) delivered to the Surplus Warehouse (these instructions detail how to enter a Disposal Request of this type).
 - Interdept. Transfer: Select this Disposal type if you are not sending the item(s) to the Surplus Warehouse and instead already know the department that you are going to transfer the item to. (Please contact the Surplus Property Office at 2-8733 before entering this type of Disposal Request.)
 - Special Bid Sales: Select this Disposal Type if you are not sending the item to the Surplus Warehouse and instead would like to sell the item online through a special bid auction where anyone can bid on the item. (Please contact the Surplus Property Office at 2-8733 before entering this type of Disposal Request.)
4. Select a Pickup Type:
 - Surplus Property Office: Select this pickup type if you want Surplus to pick up the item(s) for you (you will be charged for this).
 - Self-Delivery: Select this pickup type if you are going to deliver the item(s) to Surplus. If you select Self-Delivery, you will also need to enter a Delivery Date and estimated delivery time.
5. Select a Building Number (Bldg.#). The building you select should be the one where the item(s) are located. (If the items you are entering are in multiple locations, then enter a multiple-line Disposal Request.)
6. Enter a room number (room#) showing where the item(s) are located.
7. Select the Item Type (Item) that describes the item(s) you are disposing of.
8. Enter the number of (Qty) items you are disposing of.
9. Select a condition (Condition).
10. Enter an estimated value for the items (this is optional).
11. Select a Freight account (Freight). This is the account that will be charged if you selected a pickup type of Surplus Property Office. If you select a pickup type of Self-Delivery, you are also required to select a Freight account, but you will not be charged.

Note: The Chartfield combination shown on the Disposal Request is the combination that was specified on your Department Setup form when your Department was first created in the system. To make changes to this ChartField combination, contact the Controller's Office Systems Development Department at Help.Desk@ctrl.ohio-state.edu.

12. If the item is an OSURF asset, click on the OSURF check box (OSURF). This will cause the DR to workflow to OSURF. They will then approve the item(s) for Disposal.
13. If there is a tag number associated with this item, enter the tag number (Tag #). When you enter the tag number and you click outside (or tab out of) this field, the rest of the information for the asset automatically populates. If you have multiple tag numbers, you will need to create a multi-line Disposal Request with each tag number on a different line. Entering a tag number in this field causes the Disposal Request to appear on the Asset Management page. Asset Management reviews the Disposal Request and, if appropriate, retires the asset.

Note: You can enter tag numbers only if the asset belongs to the Department you selected when you logged in. For instance, if you logged in as Accounting and you enter a tag number for an asset that belongs to Biotechnology, you will get an error message. You must transfer the asset to the Department you want to dispose from, or log in as the Department that owns the asset and enter the Disposal Request from there.

14. Enter the serial number (Serial #) for the item(s) (optional).
15. Enter the model number (Model #) for the item(s) (optional).
16. Enter a description (Description) of the item(s).
17. Enter a manufacturer (Manufacturer) (optional).
18. Enter an acquisition cost (Acq. Cost) (optional).
19. Enter an acquisition date (Acq. Date) (optional).
20. Click on the save icon () , located to the right of the description box, in order to save that Disposal Request line item.
21. After being saved, the Disposal Request line you entered will appear below the text boxes. You can edit this line by clicking on one of the fields. This will bring the line information back up to the text boxes so that you can edit it. You can delete the line by clicking on the trash icon () to the right of the line. You can also upload an image of the item(s) on this line by clicking on the image upload icon () on that line.
22. To add lines to the Disposal Request, follow steps 5 through 21 again for each line you want to add.
23. When you have entered all the lines of the Disposal Request, select the name of the person who will approve the Disposal Request in the Authorized By drop-down menu.
24. Click on the  button to save your Disposal Request.




25. Your Disposal Request is now saved (see figure 14). The Disposal Request number will show in the DR# field and a status of “Pending” will be displayed in the Status field. In addition, an email will be sent to the person you selected as the Approver, notifying them that they have a Disposal Request to approve. You can print the Disposal Request by clicking on the  button.

DEPARTMENTS : DISPOSAL REQUESTS : TURN INTO SURPLUS				
Search		Add Edit		
Department Name	Dept. Contact Person	Phone	Email	
Dana's Test Department	Brentlinger Dana	(614) 247-8619		
Disposal Type	Date	DR#	Status	Notes
Turn into Surplus	04/16/2008	10418	Pending	
Pickup Type	To ensure pickup by the OSU Surplus, please list all items for disposal. Thank you.			
Surplus Property Office				
Bldg.#	Room#	Item	Qty	Condition
Select:	Select:		1	Select:
OSURF Tag #	Serial #	Model #	Description	
Manufacturer	Acq.Cost	Acq.Date		
Select:				
Img	Bldg	Room	Item	Qty
	0300	2070	Computer Equip. & Peri...	3
				Condition
				Good
				Est.Value
				150.00
				Min
				64416
				Distr.Acct.
				64416
Total Records: 2				
Created By	Authorized By	Phone	Email	Authorized
Brentlinger Dana	Test Dana	(614) 555-5555		<input type="checkbox"/>
<input type="button" value="New"/> <input type="button" value="Edit"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Delete"/> <input type="button" value="Print"/>				

Figure 14 - Saved Disposal Request


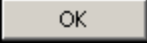
7.7 Edit a Disposal Request

To edit a Disposal Request, go to the Disposal Requests page (Departments→Disposal Requests), and then follow the steps listed below:

1. Search for the Disposal Request.
2. Click on the Disposal Request number in the search results. This takes you to the Disposal Request Add/Edit page.
3. Click on the  button.
4. Make the changes. Note that to edit a Disposal Line, you must click on that line. The information is then displayed in the fields as editable.
5. To cancel any changes, click on the  button. Otherwise, to save your changes, click on the  button.

7.8 Delete a Disposal Request



To delete a Disposal Request, go to the Disposal Requests page (Departments→Disposal Requests), and then follow the steps listed below:

1. Search for the Disposal Request.
2. Click on the Disposal Request number in the search results. This takes you to the Add/Edit page.
3. Click on the  button, and then click on the  button in the warning box that appears. The Disposal Request is now deleted.

Note: A Disposal Request cannot be deleted if it has been added to a Surplus Manifest or the items have been delivered to Surplus.


7.9 Approve a Disposal Request

To approve a Disposal Request, go to the Disposal Requests page (Departments→Disposal Requests), and then follow the steps listed below:

1. Search for the Disposal Request.
2. Click on the Disposal Request number in the search results. This takes you to the Disposal Request Add/Edit page.
3. Click on the  button.
4. Make sure your name is selected in the *Authorized By* drop-down menu, then click on the Authorized check box.
5. Read the conditions in the Authorization window and then click on the  button if the Disposal Request meets the conditions listed.
6. The Disposal Request is now approved.

7.10 Unapprove a Disposal Request

To unapprove a Disposal Request, go to the Disposal Requests page (Departments→Disposal Requests), and then follow the steps listed below:

1. Search for the Disposal Request.
2. Click on the Disposal Request number in the search results. This takes you to the Disposal Request Add/Edit page.
3. Click on the  button.
4. The Disposal Request is now unapproved.

Note: A Disposal Request cannot be unapproved if it has been added to a Surplus Manifest or if the items have been delivered to Surplus.

8.0 Disposal Tracking

Use the Disposal Tracking page to track your Disposal Request from entry to Surplus Inventory. To find the page, click on the **Departments** menu item and then click on the **Disposal Tracking** sub-menu item.

There are two tabs on this page. The **Disposal Requests** tab lists each Disposal Request (see figure 15). The **Disposal Line Items** tab lists each line of the Disposal Requests.

OHIO STATE UNIVERSITY
Surplus Property Management System
 Logged in Administrator:
 Dana Test

DEPARTMENTS : DISPOSAL TRACKING

Disposal Requests | **Disposal Line Items**

Disposing Department: Dana's Test Department

Please check the Completed items that have been picked-up or delivered.

Disposal Type	DR#	Date	Authorized by	Status
Turn into Surplus	10418	04/16/2008	Test Dana	In Progress
Turn into Surplus	10352	03/26/2008	Test Troy	In Progress
Turn into Surplus	10221	03/10/2008	Test Dana	Completed

Total Records: 3




Print

Figure 15 - Disposal Tracking page. Disposal Request tab is open.

8.1 Disposal Requests Tab

Description of Fields on the Page:

- Disposing Department: The Department that entered the Disposal Request. This always displays the name of the Department you selected when you logged in.
- Disposal Type: The Disposal Type of a Disposal Request. Available values are Turn into Surplus, Interdept. Sales and Special Bid Sales.
- DR#: The Disposal Request number.
- Date: The Date that the Disposal Request was entered.
- Authorized By: The name of the person who approved the Disposal Request.




- **Status:** The current status of the Disposal Request. Available values and their meanings are listed below:
 - **Pending:** The Disposal Request has been entered and saved but has not been added to a manifest yet (pickup type of Surplus Property Office) or delivered to Surplus yet (pickup type of Self-Delivery).
 - **In Progress:** The Disposal Request has been added to a manifest (pickup type of Surplus Property Office).
 - **Completed:** The items on the Disposal Request have been received by Surplus and added to the Surplus inventory. When a Disposal Request is in completed status, a check box appears on that line. Check the box to remove the Disposal Request from the page and change the status of the Disposal Request to “Closed” on the Disposal Requests search page.
 - **Cancelled:** The line items on the Disposal Request were deleted instead of being received into Surplus inventory.
-  - This is the filter icon. When you click on the icon, filter boxes appear below the column headings. If this icon is clicked again, the filter boxes are removed from the screen.
-  - The view details icon. Click on this icon to open a print preview window of the Disposal Request. To then print the Disposal Request, select File→Print.
-  - Click on this button to open a print preview window that lists all the items currently on the screen. To print, select File→Print.

8.2 Disposal Line Items Tab

Description of Fields on the Page:

- **Disposing Department:** The Department that entered the Disposal Request. This will always display the name of the Department you selected when you logged in.
- **Disposal Type:** The Disposal Type of a Disposal Request. Available values are Turn into Surplus, Interdept. Sales and Special Bid Sales.
- **DR#:** The Disposal Request number.
- **Date:** The Date the Disposal Request was entered.
- **Item:** The Item description for this Disposal Request line.
- **Qty:** The quantity for this Disposal Request line.
- **Tag#:** The tag number for this Disposal Request line.
- **Status:** The current status of the Disposal Request line. Available values and their meanings are listed below:
 - **Pending:** The Disposal Request has been entered and saved but has not been added to a manifest yet (pickup type of

Surplus Property Office) or delivered to Surplus yet (pickup type of Self-Delivery).

- In Progress: The Disposal Request has been added to a manifest (pickup type of Surplus Property Office).
- Completed: The items on the Disposal Request have been received by Surplus and added to the Surplus inventory. When a Disposal Request is in completed status, a check box appears on that line. Check the box to remove the Disposal Request from the page and change the status of the Disposal Request to “Closed” on the Disposal Requests search page.
- Cancelled: The line items on the Disposal Request were deleted instead of being received into Surplus inventory.
- : This is the filter icon. When this icon is clicked, filter boxes appear below the column headings. If this icon is clicked again, the filter boxes are removed from the screen.
- : When this icon is clicked, more details about the Disposal Request line are displayed, such as Building number, Condition, Description, Room number, estimated value, and account.
- : When this button is clicked, a print preview window opens that lists all of the items currently on the screen. To print, select File→Print.

8.3 Close a Disposal Request

When a Disposal Request is in “Completed” status, you can close it. This removes it from the Disposal Tracking page. To close a Disposal Request, follow the steps listed below:

1. Go to the Disposal Tracking page (Departments→Disposal Tracking).
2. The Disposal Request needs to be in “Completed” status. Look for the check box on the same line as the Disposal Request and click on that check box to close Disposal Request. Click on the OK button in the Warning box that appears (see figure 16).
3. The Disposal Request will be removed from the Disposal Tracking page. When you view the Disposal Request on the Disposal Requests page, the status will now show as “Closed.”




Figure 16 - Disposal Request ready to be Closed

8.4 How to Sort the Columns


To sort the columns on the Disposal Tracking page, click on the column heading once to sort in ascending order and click on the column heading again to sort in descending order. An arrow appears to the right of the column heading to let you know if the column is sorted in ascending or descending order.

8.5 How to apply Filters

To filter the items displayed on the Disposal Tracking page, click on the filter icon . The filter text boxes are then displayed.

To filter a column, type the item you are looking for in the filter text box. This applies the filter to the column.

To remove a filter, delete the text in the filter box and all items will appear again.

Note: To remove a date filter, click on the clean icon  located to the left of the year on the calendar.

To remove all the filter text boxes, click on the filter icon  and the text boxes will be hidden again.

9.0 Surplus Public Website

The Surplus public website(see figure 17) is the public site that anyone with internet access can go to in order to see what is in Surplus Inventory, sign up for email notifications, and bid on special bid sales. In addition, the public site can be used by anyone with an OSU Internet Username (name.n) to view items that have been entered for Disposal by other Departments, but that have not been received into Surplus Inventory yet. University personnel have the option of contacting the Department directly in order to have the items transferred before they reach Surplus.

For information on the different pages on the public site, click on the  tab.

The URL for the Surplus public website is: <https://www.ctrl.ohio-state.edu/su/public.aspx>



Surplus Property

Home About Us Buyer Registration Department Inventory Surplus Inventory Special Bid Sales FAQs Help

Home

**THE OHIO STATE UNIVERSITY
OFFICE OF SURPLUS MATERIALS DISPOSAL**

Public Buyer

- Purchases are subject to University [terms and conditions](#).
- Select the Surplus Inventory tab to see the inventory in the Surplus Warehouse.
- Select the Buyer Registration tab to register an account and select preferences.
- If you have already registered an account with us you can login (on the right) to update and/or view your personal information and preferences.

OSU Employee Buyer

- **Login** with your OSU Internet Username to see items available for purchase in Surplus and in departments.
- Select the Surplus Inventory tab to see the inventory in the Surplus Warehouse.
- Select the Department Inventory tab to view items still located in the Department and available for transfer to other OSU departments.
- Items approved for disposal by one department
 - are available for transfer to another department,
 - are available for purchase by another department, and
 - are not available for personal purchase.
- Have your Surplus Coordinator initiate the transfer on your behalf.

OSU Surplus Coordinator

- **Login** to create, manage and approve disposal requests.
- The form and instructions to register as a Surplus Coordinator are available on the [Controller's Office forms page](#).

Login : Email

Password

OK

[Forgot Password?](#)

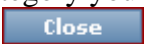

Figure 17 - Surplus Public Site

10.0 Want List


The Want List page can be used to track a list of items you are looking for. When one of those items is added to Surplus Inventory, then it will be displayed under Found Items on the Want List page.

10.1 Add an Item to the Want List


To add an item to your Department's Want List, follow the steps listed below:

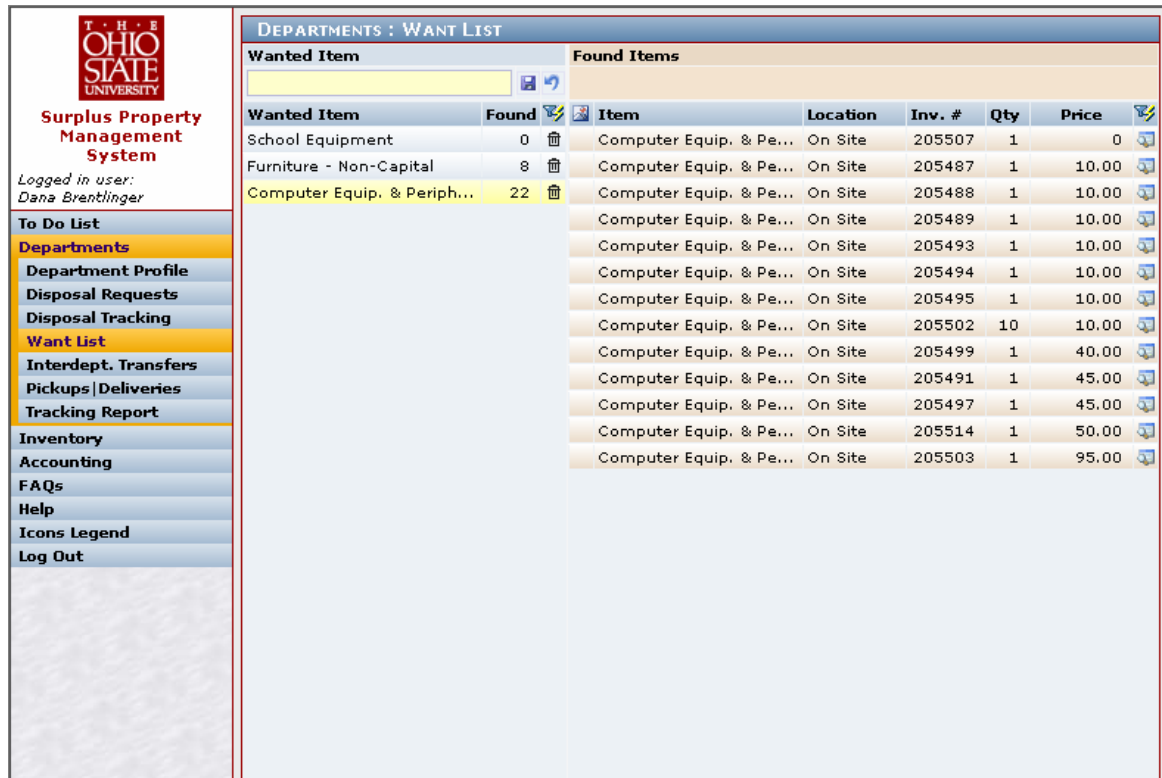
1. Go to the Want List page (Departments→Want List).
2. Click inside the Wanted Item text box. A categories window will open.
3. Select the category you want to add to your Want List.
4. Click on the  button.
5. The category you selected will now be displayed in the Wanted Item text box.
6. Click on the save icon () located to the right of the Wanted Item text box.
7. The Wanted item is added to your Wanted Items list.

10.2 Delete a Category from the Want List

To delete a category from your Want List, click on the trash icon () located to the right of that category. Click on the OK button in the warning box that appears. The item is now removed from your Want List

10.3 View Found Items

When a category is added to your Want List, the Found column lists the number of items that are currently in Surplus Inventory in this category. To view the found items, click on the Wanted Item. This causes the Found Items for that Inventory Category to appear on the right side of the screen (see figure 18). To view the details of any of these inventory items, click on the view details icon (). A new window will open that displays the inventory details (this can be printed by selecting File→Print).



Wanted Item		Found	Found Items				
Wanted Item	Found	Item	Location	Inv. #	Qty	Price	
School Equipment	0	Computer Equip. & Pe...	On Site	205507	1	0	
Furniture - Non-Capital	8	Computer Equip. & Pe...	On Site	205487	1	10.00	
Computer Equip. & Periph...	22	Computer Equip. & Pe...	On Site	205488	1	10.00	
		Computer Equip. & Pe...	On Site	205489	1	10.00	
		Computer Equip. & Pe...	On Site	205493	1	10.00	
		Computer Equip. & Pe...	On Site	205494	1	10.00	
		Computer Equip. & Pe...	On Site	205495	1	10.00	
		Computer Equip. & Pe...	On Site	205502	10	10.00	
		Computer Equip. & Pe...	On Site	205499	1	40.00	
		Computer Equip. & Pe...	On Site	205491	1	45.00	
		Computer Equip. & Pe...	On Site	205497	1	45.00	
		Computer Equip. & Pe...	On Site	205514	1	50.00	
		Computer Equip. & Pe...	On Site	205503	1	95.00	

Figure 18 - Want List Page

11.0 Interdept. Transfer Page

The Interdept Transfer page is used by the receiving department in an Interdept Transfer Disposal Request. It is used by the receiving department to confirm that they have

received the items on the Disposal Request and to select a Debit account. When the receiving department has completed these tasks, the Interdept Transfer Disposal Request has a status of “Completed.”

For more information on Interdept Transfer Disposal Requests, please contact the Surplus Property Office at 2-8733.

12.0 Pickups/Deliveries

The Pickups/Deliveries page (see figure 19) displays any Disposal Requests, for the Department that you are logged in as, that are currently assigned to a Surplus Manifest. When an item is received into Surplus Inventory, it is removed from this page. The Pickups/Deliveries page is used only for Turn into Surplus Disposal Requests with a Pickup Type of Surplus Property Office.

The screenshot shows the 'Surplus Property Management System' interface. On the left is a navigation menu with options like 'Departments', 'Department Profile', 'Disposal Requests', 'Disposal Tracking', 'Want List', 'Interdept. Transfers', 'Pickups|Deliveries', 'Tracking Report', 'Inventory', 'Accounting', 'FAQs', 'Help', 'Icons Legend', and 'Log Out'. The main content area is titled 'DEPARTMENTS : PICKUPS|DELIVERIES' and has tabs for 'Pickups' and 'Deliveries'. Below the tabs is a 'Disposing Department' dropdown menu set to 'Dana's Test Department' and a checkbox for 'completed Delivery items.'. A table displays disposal requests with the following data:

Date	Bldg.#	Room#	DR#	Item	Qty	Truck
04/16/2008	0311	177	10437	Automotive Equipment - ...	1	Toyota Truck
04/16/2008	0360	2048	10418	Computer Equip. & Periph...	2	Budget Van

Figure 109 - Pickups/Deliveries Page

13.0 Tracking Report

The Tracking Report page can be used by a Department to view which items that they sent to Surplus have sold and how much they sold for. You can search for the item(s) by SP101# (Disposal Request number), SNumber (serial number), Tag #, Sales Order #, and Sales Order Date. The report shows you when the item was sold, how many of the items were sold, and what price they sold for, excluding sales tax (see figure 20).

DEPARTMENTS : TRACKING REPORT										
Find Disposed Items by:		SP101 #		10418						
DR#	Category	Inv.#	Tag #	Pickup Date	Qty	Sale Date	Expenses	Distr.Amt.	Tran...	
10418	Computer E...	205516		04/16/2008	1	04/16/2008	\$0.00	\$25.00	Inve...	

Total Records: 1



Figure 20 - Tracking Report

14.0 Inventory Details

Use the Inventory Details page to view items currently at the Surplus Warehouse. (These items are also listed on the Public site on the Surplus Inventory tab.) To go to the Inventory Details page, click on the **Inventory** menu item and then click on the **Inventory Details** sub-menu item.






Description of Fields on the page:

- **Find Inventory by** : This drop-down menu is a list of search options that can be used to search for inventory (available options are: Inv#, Tag#, Department Name, Department Number, DR#, Item Name).
- - Search icon. Click on this icon to execute a search of the inventory.
- - The view all icon displays all inventory in the search results.
- - The print icon opens a print preview window of all the items listed in the search results section. To print the report in the print preview window, select File→Print.
- - The image icon signifies that there is an image attached to this inventory item.
- **Department** - This column displays the name of the Department that sent the Inventory item to the Surplus Warehouse.

- **DR.#** - This column displays the Disposal Request number that was originally associated with the item before it was added to Surplus Inventory.
- **Inv.#** - This column displays the Inventory Number associated with the item.
- **Item** - This column displays the item category assigned to the inventory item.
- **Qty** - This column displays the number of items currently in inventory.
- **Resvd** - This column displays the number of inventory items that are currently reserved. (This system functionality is not currently used by the Surplus Property Office so it should always show zero.)
- **Sold** - This column displays the number of inventory items that have been sold.
- **Location** - This column displays where the inventory item is currently located. (This system functionality is not currently used by the Surplus Property Office. All inventory items are located at the Surplus Warehouse.)
-  - If the item was an OSURF asset, this column displays a green check mark (✓). If the item was not an OSURF asset, a red ✖ is displayed in this column.
-  - The details icon shows the details for the inventory item.

14.1 Search for Inventory

To search for Inventory using the Inventory Details page, follow the steps listed below:

1. Go to the Inventory Details page (Inventory → Inventory Details)
2. Select a Search option from the *Find Inventory by* drop-down menu. The options are listed below:
 - Inv. # (Inventory Number)
 - Tag # (Tag Number)
 - Department Name (Name of Department that sent the inventory item(s) to the Surplus Warehouse)
 - Department Number (Number of Department that sent the inventory item(s) to the Surplus Warehouse)
 - DR# (Number of the Disposal Request that the inventory item(s) came from)
 - Item Name (the inventory category that the item(s) is assigned to)
3. Enter your search term in the text box to the right of the drop-down menu.
4. Click on the search icon ()
5. The search results are displayed in the search results section (see figure 21). To view the details of the inventory, click on the details icon (). An image icon () on the same row as the inventory item indicates that there is a picture attached to the inventory item. To view the picture click on the details icon () or on the image icon ()

Note: If you want to display all inventory, click on the view all icon (📄).

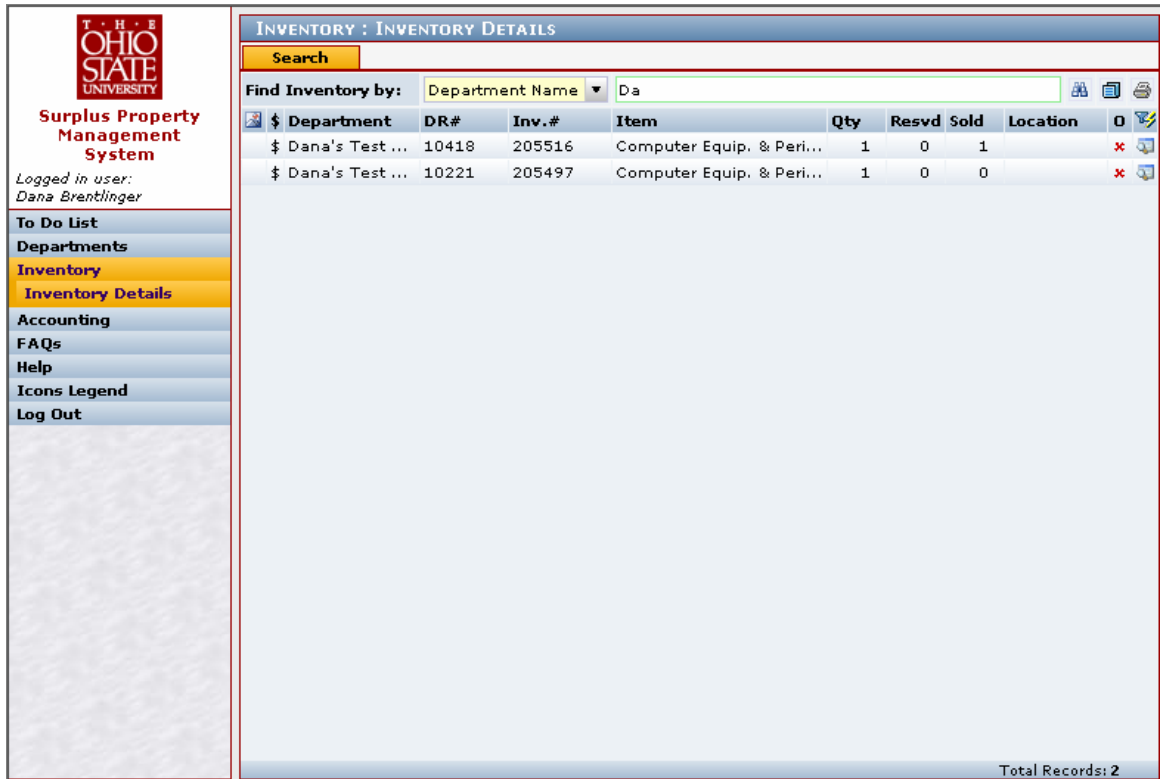


Figure 21 - Inventory Details Page - Search for Department Name beginning with "Da"

15.0 Accounting Page

The Accounting page (found by clicking on the **Accounting** menu item) is not currently used.

16.0 FAQs Page

The FAQ (Frequently Asked Questions) page (**FAQs** menu item) can be used to search for an FAQ or to browse through the questions. Please consult this page when you have a question, before contacting the Surplus Department.

17.0 Help Page

Use the Help page (see figure 22) to look at help files for each screen in the Surplus Property Management System. To access the Help page, click on the **Help** menu item.

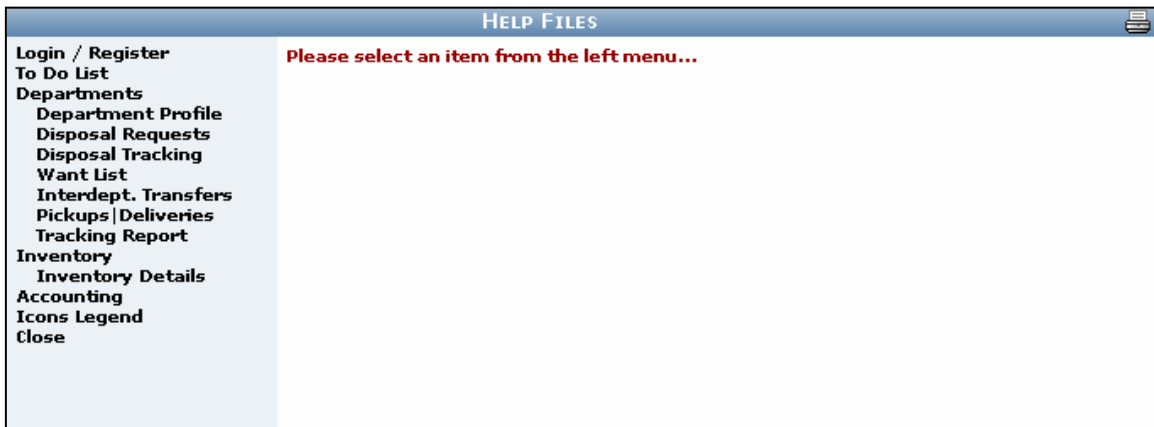


Figure 22 - Help Page

18.0 Icons Legend

The Icons Legend page shows a list of icons in the Surplus Property Management System and what each icon means (see figure 23). To access the Icons Legend, click on the

Icons Legend menu item.

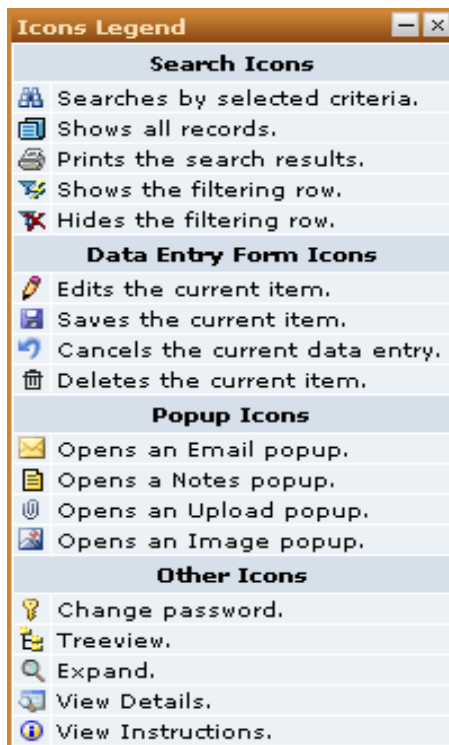


Figure 23 - Icons Legend