Surplus Property Management System

**Purpose:** The Surplus Property Management System is an electronic solution for submitting items to the Surplus Property Warehouse.

**Security Access Requirements:** Users, Managers, and Administrators must have Onyen ID and email address found in the directory. Administrators can set up additional administrators, managers, and users in the system.

**Prerequisites:** Administrators must submit department profile information for initial set up by Asset Management.

**Find Help:** Call 919-962-HELP and the issue will be routed appropriately. For Operational Assistance, call Jessica Hwang-Strickland at 919-962-6267 or email hwangcpa@email.unc.edu.
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I. Establishing Department Administrator Access

Department administrators generally serve as the department representative for Asset Management, and are primary contacts for sending items to Surplus. A department can have multiple department administrators. As a department administrator you are responsible for establishing manager/user access, approving manager/user pickup requests, and confirming compliance with electronic and EHS related issues.

For individuals that will be administrators for multiple departments, please complete the following steps for each unique department number:


2. Complete all fields and submit via email to Asset Management or print and fax to 962-6271.

By the close of the next business day, you will be contacted by email acknowledging the setup of your access.

II. SPMS Sign-on

1. Sign in to the ConnectCarolina portal using your ONYEN and password.
2. Under **Finance**, click on the **SPMS** link on the left hand side of the page.
III. Adding Administrators, Managers and Users

The original department administrator can follow these steps to add administrators, managers and users.

**Administrator:** administrators can create Surplus Pickup Requests, authorize existing Pickup Requests, add other administrators, give permission to managers and users to authorize surplus pickup requests, and update departmental contact information.

**Manager:** managers can create Surplus Pickup Requests, add users, and approve Pickup Requests if designated by department administrator.

**User:** users can create Surplus Pickup Requests.

1. Log in to SPMS, using steps from Section II.
2. Click **Departments** on the left toolbar.
3. Click **Department Profile**.

4. Click the **Add/Edit User** button.
To add an administrator, manager or user for a single department:

Sample Scenario: Setup a manager with the ability to authorize surplus pickup request for a department.

1. Click the **New** button.
2. Complete all fields:

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>First Name as reported in the campus directory</td>
</tr>
<tr>
<td>2</td>
<td>Middle Name or Initial as reported in the campus directory</td>
</tr>
<tr>
<td>3</td>
<td>Last Name as reported in the campus directory</td>
</tr>
<tr>
<td>4</td>
<td>E-Mail as reported in the campus directory</td>
</tr>
<tr>
<td>5</td>
<td>Position Title</td>
</tr>
<tr>
<td>6</td>
<td>Security Level Dropdown Selection (“User”, “Manager”, or “Administrator”)</td>
</tr>
<tr>
<td>7</td>
<td>Phone Number</td>
</tr>
<tr>
<td>8</td>
<td>Phone Type</td>
</tr>
</tbody>
</table>
Check this box to indicate that the number listed is the preferred method of contact for this individual.

Since we are adding a “manager” click the appropriate department to grant access for authorizing surplus pickup requests. This step is not done when adding a “user” individual.

3. Click the **Save** button.

Result: The user is added into SPMS and can be selected from the user dropdown.

![Image of SPMS interface]

If this individual needs to have access or approval authority for more than one department, send an email to assets_team@unc.edu and provide the user’s:
Name and email (as found in the campus directory)  
Job Title  
Phone Number  
Additional departments needing access  
Security level requested (admin, manager, user)  
Authorization permission (Y or N)

IV. Editing Existing Administrators, Managers and Users in the Department Profile

Administrators can edit other administrators, managers and users. Managers can edit other managers and users. Users can edit only themselves.

1. Complete steps one through three in Adding administrators, managers and users.
2. Select the individual you wish to edit by clicking on his/her name.

3. Click the Edit button.
Note: Administrators, managers and users can be deleted by selecting the **Delete** button.
V. Entering Surplus Pickup Requests

1. Sign into SPMS by completing steps found in Section II.
2. Click Departments on the left toolbar.
3. Click **Surplus Pickup Request**.

4. Click the **Add/Edit** tab.
5. Click the **New** button at the bottom.
6. Select the “Dept. Contact Person” (Administrator, Manager, or User)

7. Click the “Pickup Type” dropdown and select whether you want Surplus Property to pick up the items from the department or if you will deliver the items to the Surplus Property Warehouse.
8. Click in the building field and type the first several characters of your building name. The field will populate with matching potential building names, click the appropriate building listing.

9. Click in the floor and room fields and type the floor and room numbers where Surplus Property will pick up the items from this request.

10. Click in the item field.
Result: The system opens a new window.

⚠️ Your internet browser will need to allow popups from this site.
You may indicate the item you are sending to surplus by either using keywords and searching the categories or by expanding the categorical fields. As an example, the item I want to surplus is a bookcase. I can enter in the search keywords and have it highlight the matching category:

Or I can click the arrow to the left of Furniture to see all the options under furniture, including Bookcase.
Regardless of search method, click the item name to populate the "item" field on the “Surplus Pickup Request Form” and click the Select button.
11. Complete all remaining fields referencing the table below.

<table>
<thead>
<tr>
<th></th>
<th>Qty.</th>
<th>Edit this field when surplusing more than one like item. Note: this field may not be greater than one if the item has either an asset decal number or computer repair center (CRC) number.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Condition</td>
<td>Use the dropdown to designate a realistic estimation of the item(s)' condition.</td>
</tr>
<tr>
<td></td>
<td>CRC Number</td>
<td>Complete this field only if the item has an assigned CRC number (i.e. some printers, monitors, laptops, and pcs on campus). For similar multiple items use the clone feature.</td>
</tr>
<tr>
<td></td>
<td>Asset #</td>
<td>UNC Asset Management Decal Number (very important to include when present)</td>
</tr>
<tr>
<td></td>
<td>Serial #</td>
<td>Enter the item’s serial number. If an asset # was previously entered this field will automatically populate.</td>
</tr>
<tr>
<td></td>
<td>Model #</td>
<td>Enter the item’s model number. If an asset # was previously entered this field will automatically populate.</td>
</tr>
<tr>
<td></td>
<td>Manufacturer</td>
<td>Enter the manufacturer’s name. Doing so may prepopulate the next field. If it does not pre-populate, disregard.</td>
</tr>
<tr>
<td>---</td>
<td>--------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Acq. Cost</td>
<td>Users should not edit this field. It is only applicable to assets with decal numbers and will automatically pre-populate.</td>
</tr>
<tr>
<td></td>
<td>Acq. Date</td>
<td>Users should not edit this field. It is only applicable to assets with decal numbers and will automatically pre-populate.</td>
</tr>
<tr>
<td></td>
<td>Description</td>
<td><strong>Required field.</strong> Add a short description of the item. Training example description may be “4 shelf wood bookcase”</td>
</tr>
</tbody>
</table>

12. Click **Save Line Item** to save after entering each individual item.
Successful entering of an individual line item is confirmed by the lines’ display in the “Surplus Pickup Request” form. To add an additional item to this request, repeat steps 9-12 from this section. If you are adding a similar item, you can use the clone feature to avoid duplicate data entry. To clone, click  and SPMS will create a new line in the “Surplus Pickup Request” replicating the Room #, Item, Qty, Condition, and Description allowing you to modify item specific fields such as the CRC# or Asset Decal #.
Prior to completing the “Surplus Pickup Request” you may either edit or delete prior line entries. If you have already saved, to modify a line, click to highlight the line and then click the **Edit** button. To delete a line, click to highlight, click the trash icon to the right of the line, and then confirm deletion by clicking "ok".

When all items have been added/modified for this request, click the Save button. A successful save will gray out the Saved button.
If you are setup as a Surplus Pickup Request approver for your department, proceed to the next section. If you are not an approver, send an email to the departmental approver alerting them to the presence of a request.

VI. Approval Process for Submitting Surplus Pickup Requests

1. Follow the steps in Section II to sign on.

2. Click “Departments” in the left menu.
3. Click **Surplus Pickup Request** and make sure the **Search** tab is selected.
Result: The system displays all the requests waiting for approval.

4. Single click the request you wish to approve.

5. Click the line you want to approve, make sure the **Add/Edit** tab is selected, and click the **Edit** button.
6. Verify the information and modify/add items as necessary.

7. Select the authorized by dropdown and choose your name:
8. Click the check box to authorize.
9. Click the **Yes** button on the conditions statement screen.
10. Click the **Print** button to generate the hardcopy authorization form, and then click the other **Print** button.
11. Sign the hardcopy request form and have it available with the items awaiting pickup.
VII. Reports

Request Tracking Report

This report shows a status list of surplus pickup requests submitted. It is viewed and maintained by the using department.

1. Login to SPMS using the steps from Section II.

2. Click Departments on the left menu.

3. Click Request Tracking.

A list of Surplus Pickup Requests (DR#s) displays on this screen. The status of each request is also reported and may be translated as:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>Waiting for department approval or pickup scheduling by Surplus Property</td>
</tr>
<tr>
<td>In Progress</td>
<td>Scheduled for pickup, but not received into the Surplus Property Warehouse.</td>
</tr>
<tr>
<td>Completed</td>
<td>Received by the Surplus Property Warehouse</td>
</tr>
</tbody>
</table>
To obtain further details about a specific surplus pickup request (DR#), click the ‘View Disposal Request’ icon on the far right side of each line item.

Result: The system opens a new window.
This list keeps a historical record of all Surplus Pickup Requests. In order for the list not to be navigationally cumbersome or slow the system down, it is important that departments archive aging requests. Any Surplus Pickup Request with a status of "completed" may be archived.

To archive a document, click the check box directly to the right side of the DR line item. A confirmation alert window will open, select "Okay" to continue with the archive.
Inventory Details Report

The “Inventory Details Report” serves two purposes. It will allow a user to view all items a department has previously surplussed including items that were listed on an archived Surplus Pickup Request no longer available in the Request Tracking Report. Additionally, users may view the current inventory of items available for sale at the Surplus Property Warehouse.

1. Sign in to SPMS using the steps from Section II.

2. Click Surplus Inventory on the left menu.

3. Click Search Inventory.

Searching for historical department surplussed items:

1. Click the Find Surplus Items by dropdown and choose Department Number.
2. Enter the department number in the required text field to the right of the previous dropdown and click the **Search** button.

![Surplus Inventory screenshot](image1)

3. Click the **View Item Details** icon to the right of a line to view item detail.

![Surplus Inventory screenshot](image2)

**View the Surplus Property Warehouse Inventory for items available for sale:**

1. Choose **Department Name** from the drop down menu, type in **Surplus Property**, and click the **Search** button.

![Surplus Inventory screenshot](image3)
Result: The system displays items in Surplus Property Inventory. Call to check availability.