

# Training Manual

## Surplus Property Management System

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

**Security Access Requirements:** Users, Managers, and Administrators must have an Onyen ID and email address in the UNC directory. The email address used must exactly match the default email address in ConnectCarolina.

**Prerequisites:** Administrators must submit department profile information for initial set up by Asset Management. Department profiles and user access requests must be submitted via the [Access Request Form](#).

**Find Help:** For help with technical or access issues call 919-962-HELP and the issue will be routed appropriately. If you need to discuss a pickup or inquire about available inventory, please email [surplus@unc.edu](mailto:surplus@unc.edu).

## Table of Contents

Read Before Submitting or Approving Items .....	1
User Access .....	2
Signing in to SPMS .....	3
Using Context Sensitive Help Videos .....	4
Creating Surplus Pickup Requests .....	6
Approving Surplus Pickup Requests .....	20
Request Tracking .....	24
Searching for Inventory.....	26
Managing User Roles .....	30
Editing the Department Profile .....	34
Get Help .....	34

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# Read Before Submitting or Approving Items

## Your Responsibility

When you submit or approve a Surplus Pickup Request you are responsible for verifying that the item or items meet the following conditions:

- **Locks:** Items containing locks, such as file cabinets and desk drawers, must be unlocked and cleared of all contents.
- **Hazardous Materials:** When disposing of equipment that may have been used to process hazardous materials or may have contained hazardous materials, Environmental Health & Safety must issue a clearance tag before the item is moved to Surplus.
- **Refrigerators**
  - **If used for storing hazardous material:** Must be cleared by Environmental Health & Safety and have Freon removed by HVAC before moving to Surplus.
  - **If used for food storage only:** If no longer serviceable, have Freon removed by HVAC before moving to Surplus. If refrigerator is serviceable, Freon may remain in item.
- **Unit Air Conditioners:** If no longer serviceable, contact HVAC about Freon removal. If air conditioner is serviceable, Freon may remain in unit.
- **Electronic Data Storage Devices:** All Electronic Media being transferred must be sanitized in accordance with the [Secure Device Disposal guidelines](#), including the removal of all UNC-CH licensed software, and the overwriting or removal of any sensitive, confidential or otherwise protected information.

## Policies and Standards

- [603.5 – Transfer or Sale of Equipment Between University Departments](#)
- [604.1 – Disposing of University – Owned Surplus Property](#)
  - [604.1.1f – Surplus Property Management System Department Administrator Initial Registration](#)
  - [604.1.2f – Departmental Surplus Requisition](#)
- [Secure Device Disposal guidelines](#)

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## User Access

To submit items to the Surplus Property Warehouse you must be an authorized Surplus Property Management System (SPMS) user. The system has three roles for departmental users:

### 1. Departmental Administrator

Departments may have more than one administrator, and the administrator may support multiple departments.

- Create Surplus Pickup Requests.
- Authorize existing Pickup Requests.
- Optionally add users, managers and other administrators.
- Give permission to managers and users to authorize surplus pickup requests.
- Update departmental contact information.
- Confirm compliance with electronic and EHS related issues.

### 2. Manager

- Create Surplus Pickup Requests.
- Add users.
- Approve Pickup Requests if designated by department administrator.

### 3. User

- Create Surplus Pickup Requests.
- Approve Pickup Requests if designated by manager or department administrator.

## Requesting Access

To request access to the SPMS submit the two forms linked below to your [Access Request Coordinator \(ARC\)](#), who will then submit the forms through InfoPorte. If you are requesting administrator access for multiple departments, please submit separate forms for each unique department number.

- [Access Request Form](#)
- [SPMS Registration Form](#)

As an alternative to submitting the ARC form, department administrators have the option to add users, managers and other administrators within your own department, and managers have the option to add users. See Managing User Roles on page 30 to learn how. The surplus office will still need you to submit the SPMS Registration Form for their records.

## Signing in to SPMS

1. Sign in to the **ConnectCarolina** portal using your Onyen and password.
2. The SPMS link can be found on two ConnectCarolina home pages:
  - All users: **Self Service > Useful Links** tile.
  - Finance users: **Admin WorkCenter > Admin WorkCenter Links** tile.
3. Click **SPMS – Surplus Property**.

The SPMS window will open on the To Do List screen. The To Do list shows all requests and tasks that you created or that have been assigned to you. The To Do list does not automatically remove requests that have been completed. To remove an item from the list, click the black **x**.

**SURPLUS PROPERTY SOFTWARE**

WELCOME, JOANNE FILLEY  
LOGGED IN AS ADMINISTRATOR FOR  
EPROCUREMENT - MATERIALS MGMT

MENU LOGOUT HELP

### To Do List

Surplus Pickup Requests

**CURRENT TASKS** **COMPLETED**

C	Task Type	Date	Module	Task Details
x	Reminder	06/18/2013	Department profile	Sign & send Signature Report to SPO.

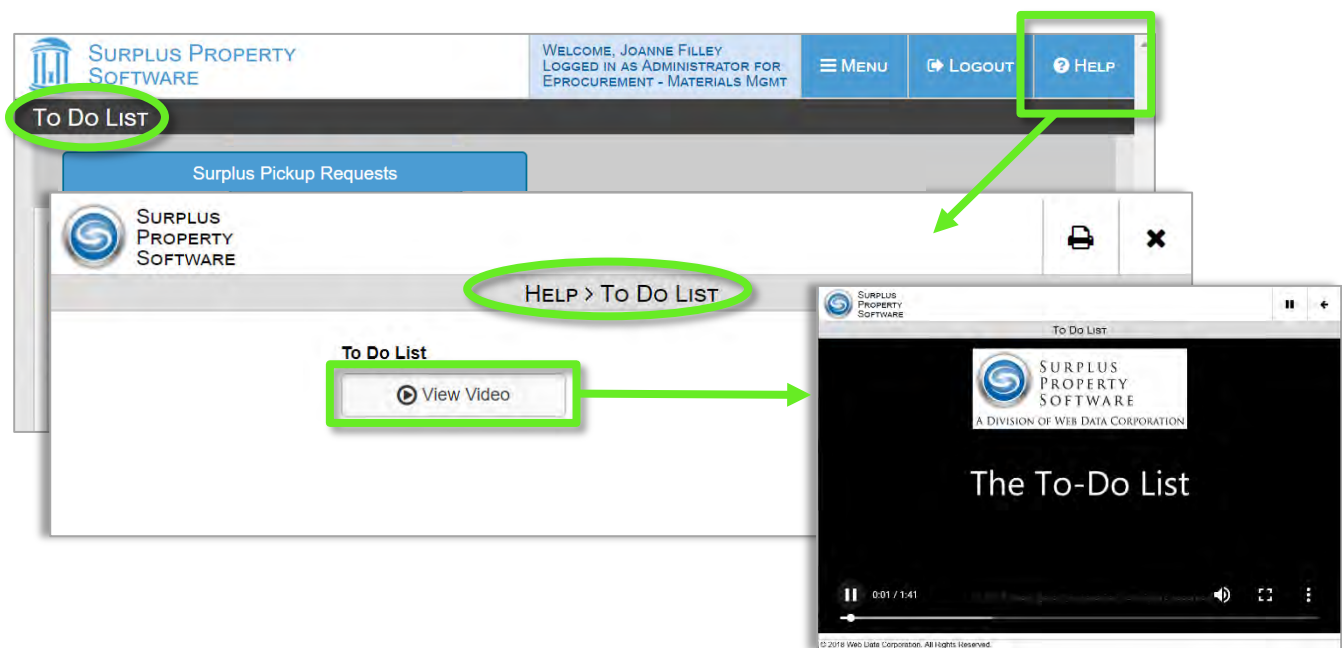
Total Records: 1

Print

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# Using Context Sensitive Help Videos

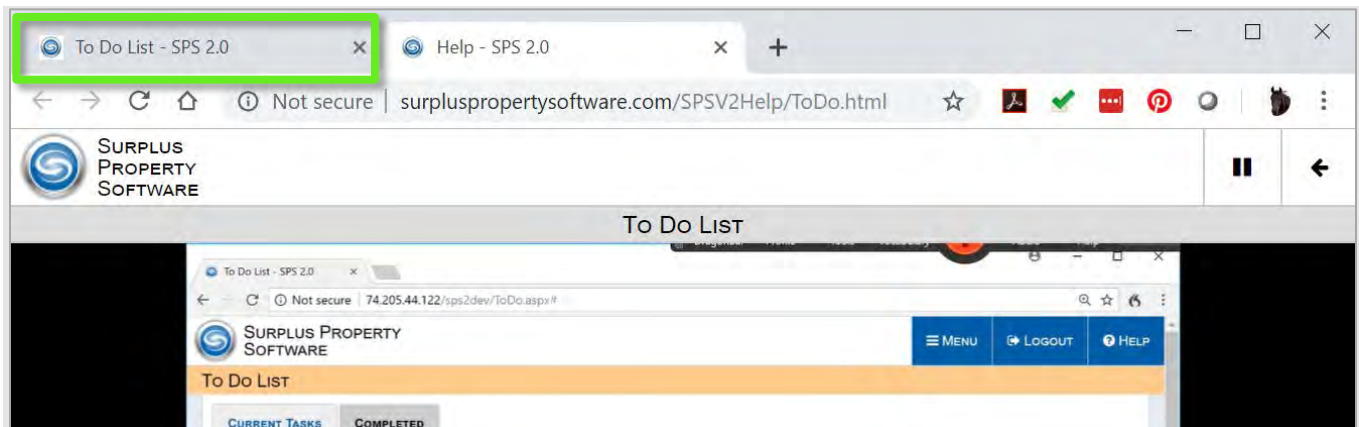
- 1. From any screen in the SPMS (in this example, the To Do List), click **Help** to open the Help screen.  
**Result:** A new browser window will open with a link to the help video for the active screen.
- 2. Click View Video to start the video.



**Note:** UNC has customized SPMS, but the help videos were created for the standard version. There are a few instances where the video terminology or explanation does not match the UNC SPMS.

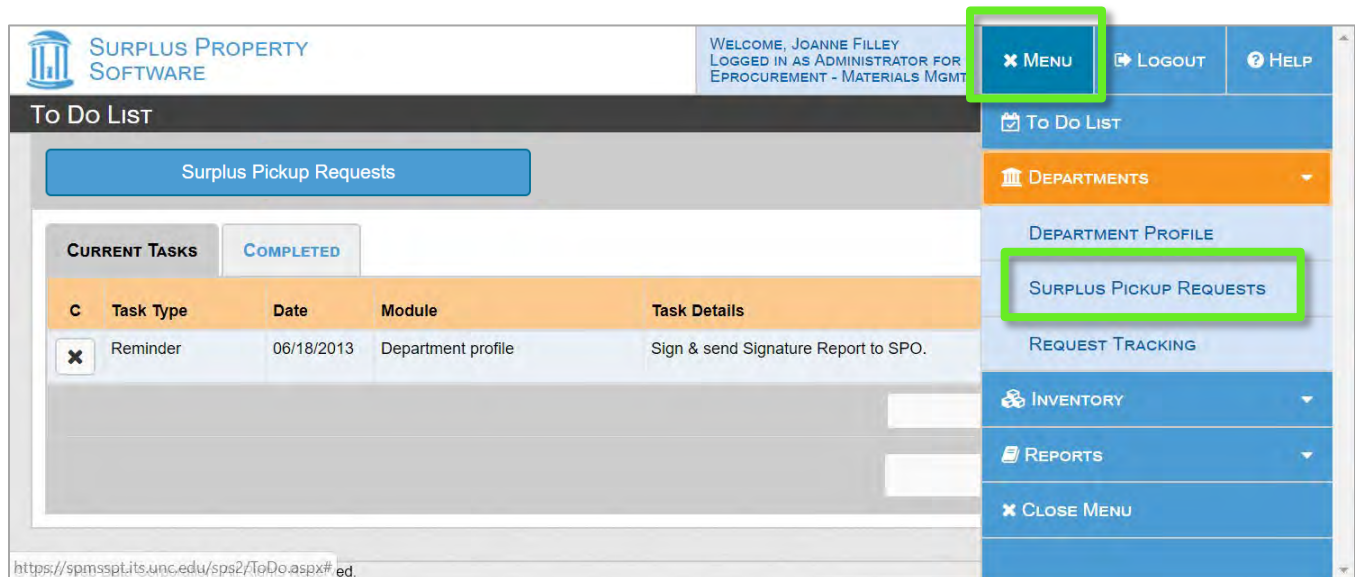
Video	UNC SPMS
Disposal Request	Is called Surplus Pickup Request on some screens. Process is the same.
Says you can approve or modify a request using the link in the notification email.	Due to security concerns, the UNC notifications do not include links. You will need to log in to SPMS to review or modify the request.

3. To return to your work, click the original SPMS tab in your browser.



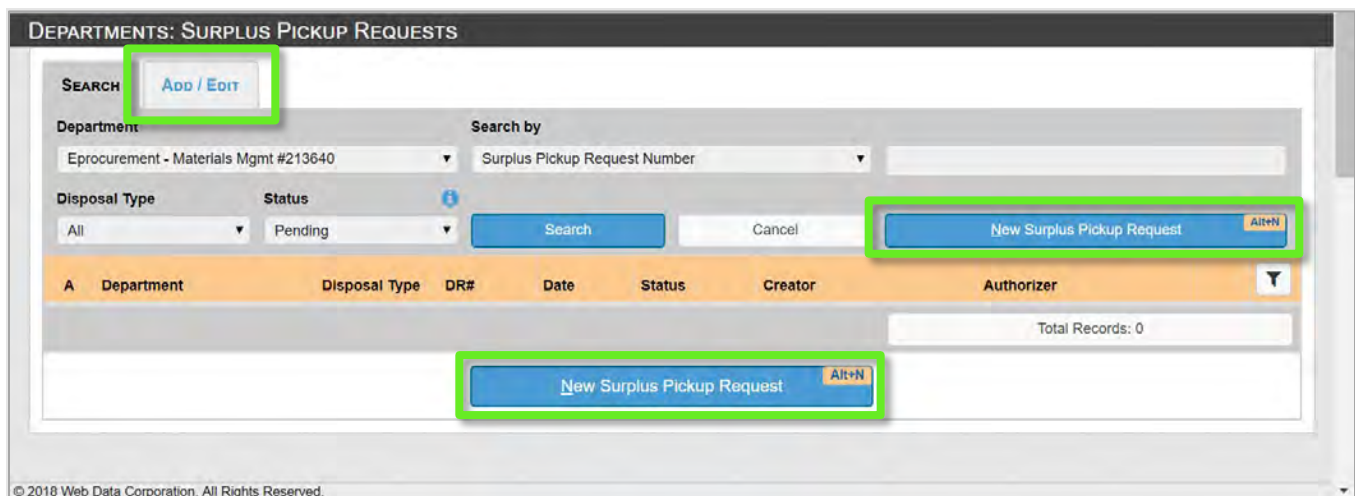
## Creating Surplus Pickup Requests

1. Click **Menu** at the top of the screen.
2. Click **Departments** from the open menu.
3. Click **Surplus Pickup Requests** from the departments list.



**Note:** Some screens and the help videos call this the “Disposal Request” process. UNC has customized SPMS to use “Surplus Pickup” instead of “Disposal,” but the two terms are interchangeable.

4. Click the **Add / Edit** tab or one of the **New Surplus Pickup Request** buttons.



5. Fill in the request fields.

**Department:** Most users will not be able to edit this field as you will only have access to create requests for your department. If, however, you are an Administrator who supports several departments, be sure to select the correct department.

**Contact Person for this Surplus Pickup Request:** This is the person that the Surplus office will contact if they have any questions. This will default to you, but select a different user from your department if needed. If you hover over the telephone or email icon, the contact's information will display at the bottom of the browser window.

**Who will authorize this Surplus Pickup Request?** Only authorized approvers in your department will appear in this list. Be sure not to select someone who is on vacation or otherwise unable to review your request.

**Disposal Type:** No changes required.

**DR#:** This will be created by the system.

**Date:** Enter the date your items will be available for pickup or delivery to the Surplus Property Warehouse.

**Status:** This will be created by the system.

**Pickup Type:**

- Select **Surplus Property Office** to request a pick-up
- Select **Self-Delivery** if the contact will be taking the items to the warehouse. You will need to add the **Req. Delivery Date** and **Estimated Time**. The warehouse will contact you if there are any problems with your delivery time.

## Adding Items

It is important to document each item that you will be sending to the surplus warehouse.

- If the item is to be picked up, the drivers need to know how much space will be needed in the truck, and the list will help ensure that no items are left behind.
- If you will be delivering the items, the surplus warehouse needs to know what you will be bringing so that they are prepared to accommodate the delivery.
- For all items, careful documentation will help the surplus warehouse manage the inventory.

### 1. Click **Add New Item**.

**DEPARTMENTS: SURPLUS PICKUP REQUESTS**

SEARCH Add / EDIT

Department: Eprocurement - Materials Mgmt #213640

Contact Person for this Surplus Pickup Request: Joanne Filley

Who will authorize this Surplus Pickup Request?: Select:

Disposal Type: Turn Into Surplus

DR#: Pending

Date: 06/28/2019

Status: Pending

Pickup Type: Surplus Property Office

To ensure pickup by the Surplus Property Office, please list all items for disposal.

Import Items... Add New Item

Building	Floor	Room	Item	Qty	Condition	CRC Number	Asset Decal#
Total Records: 0							

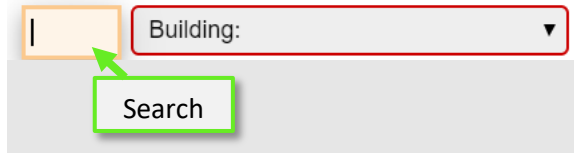


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2. Fill in the **Add/Edit Item** fields.

Enter the item's location in the **This item is located at:** section.

- **Building:** Click the down arrow to select the building.
- To find the building more quickly, you can type the first few letters or numbers of the building name or address, or enter the building code, into the search box, then click the Building: down arrow.



**Floor and Room:** Enter the location details of the item to be picked up. Be as specific as possible to help the Surplus drivers find your item.

**Item Category:** Select your item category from the list. Enter a key word into the filter box to shorten the list..

**Qty:** For items that are alike, enter the number to be sent to the warehouse. Items such as computers that have asset decal numbers or computer repair center (CRC) number, or furniture from different manufacturers, should all be entered individually. However, you can use the clone feature to easily add the similar items.

**Condition:** Use the dropdown to designate a realistic estimation of the item(s)' condition.

**CRC Number:** **Required** if the item has an assigned CRC number (i.e. some printers, monitors, laptops, and PCs on campus).

**Asset Decal#:** **Required** if the item has a UNC Asset Management Decal Number.

**Serial # and Model:** Enter the appropriate numbers. If an Asset Decal # was previously entered into ConnectCarolina these fields will automatically populate.

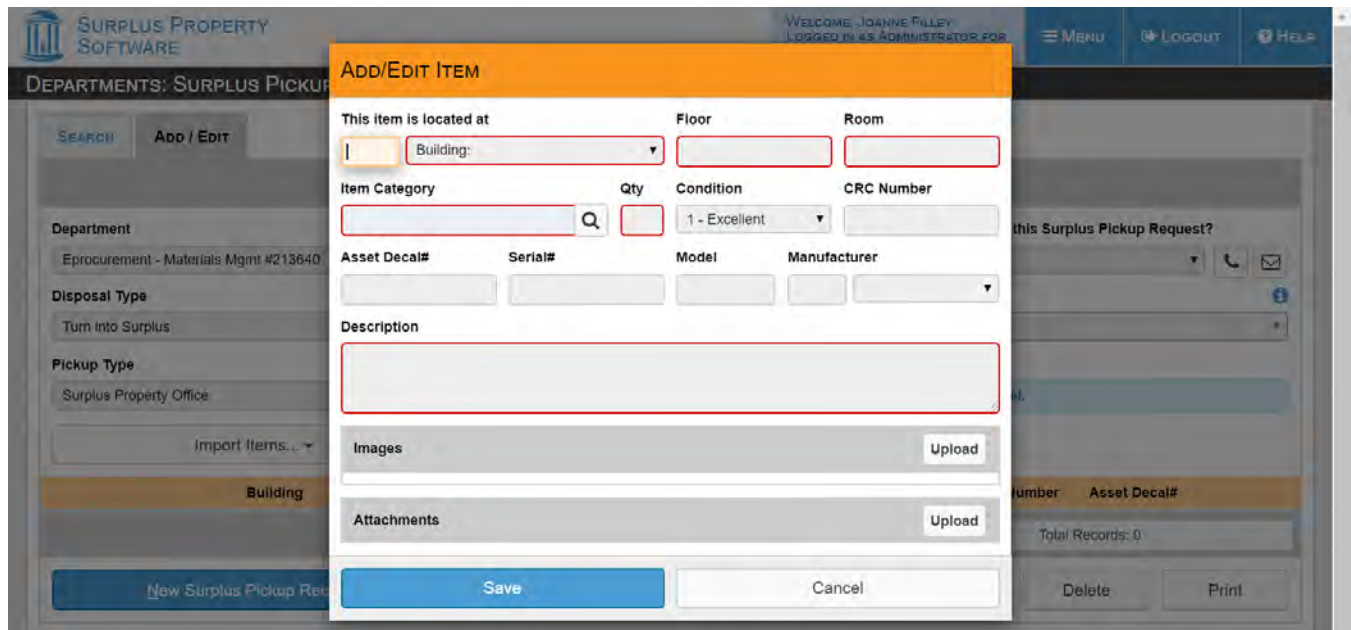
**Manufacturer:** Enter the manufacturer's name. Doing so may prepopulate the next field. If it does not pre-populate, disregard.

**Description:** Required field. Add enough detail to make it easy to identify the item. For example, "4 shelf light brown wood bookcase, 48x36 inches."

**Images:** Images are not required. Drivers are not able to access images from the pickup request screen.

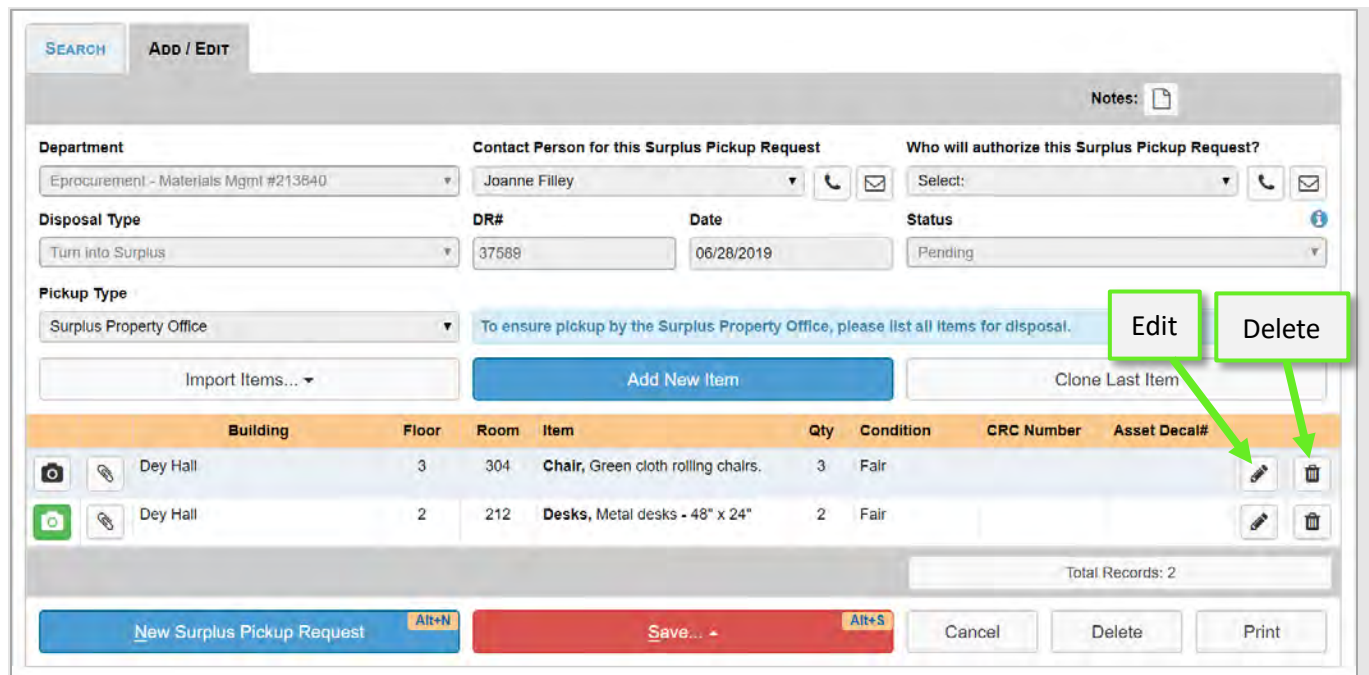
**Attachments:** Used to include any additional information that would be helpful in processing the request.

3. Click **Save** to return to the Add/Edit screen.



**Result:** The items you have added will appear on the pickup request screen.

- If you need to revise an item after saving, click the pencil icon to reopen the Add/Edit Item screen.
- To delete an item after saving, click the trash can icon.



Building	Floor	Room	Item	Qty	Condition	CRC Number	Asset Decal#
Dey Hall	3	304	Chair, Green cloth rolling chairs.	3	Fair		
Dey Hall	2	212	Desks, Metal desks - 48" x 24"	2	Fair		

4. Click the red **Save** button at the bottom of the request.
5. From the menu that pops up, select either:
  - **Save for later** if you need to make additional changes.
  - **Save and Request Authorization**.

The screenshot displays the 'Add / Edit' form for a Surplus Pickup Request. The form includes fields for Department (Eprocurement - Materials Mgmt #213640), Contact Person (Joanne Filley), Who will authorize (Select:), Disposal Type (Turn into Surplus), DR# (37589), Date (06/28/2019), Status (Pending), and Pickup Type (Surplus Property Office). A table lists items for disposal, including 'Chair, Green cloth rolling chairs' in Dey Hall. A red 'Save...' button is highlighted, and a dropdown menu is open, showing options: 'Save for later' and 'Save and Request Authorization'.

SEARCH Add / Edit

Notes: [Icon]

Department: Eprocurement - Materials Mgmt #213640

Contact Person for this Surplus Pickup Request: Joanne Filley

Who will authorize this Surplus Pickup Request?: Select:

Disposal Type: Turn into Surplus

DR#: 37589

Date: 06/28/2019

Status: Pending

Pickup Type: Surplus Property Office

To ensure pickup by the Surplus Property Office, please list all items for disposal.

Import Items... Add New Item Clone Last Item

Building	Floor	Room	Item	Qty	Condition	CRC Number	Asset Decal#
Dey Hall	3	304	Chair, Green cloth rolling chairs.	3	Fair		
Dey Hall	2						

Total Records: 2

New Surplus Pickup Request AIT+N

Save... AIT+S

Cancel Delete Print

## Cloning an Item

When adding multiple similar items that cannot be grouped because they have important unique details, such as CRC or Serial numbers that need to be entered, you can save time by using the Clone tool.

1. Enter the details for your first item.
2. Click **Save**.

**ADD/EDIT ITEM**

This item is located at: 114 Chase Ave, #661 | Floor: 2 | Room: 4

Item Category: Computer components | Qty: 1 | Condition: 2 - Good | CRC Number: 123

Asset Decal#: 456 | Serial#: CS16 | Model: YE78 | Manufacturer: dell | DELL

Description: 20" monitors

Images: [Upload]

Attachments: [Upload]

**Save** | Cancel

**Result:** The new item will appear in the item list.

3. Click **Clone Last Item**.

**DEPARTMENTS: SURPLUS PICKUP REQUESTS**

SEARCH | Add / Edit

Notes: [Icon]

Department: Eprocurement - Materials Mgmt #213640 | Contact Person for this Surplus Pickup Request: Joanne Filley | Who will authorize this Surplus Pickup Request?: Select: [Icon]

Disposal Type: Turn into Surplus | DR#: 37603 | Date: 08/05/2019 | Status: Pending

Pickup Type: Surplus Property Office | To ensure pickup by the Surplus Property Office, please list all items for disposal.

Import Items... | Add New Item | **Clone Last Item**

Building	Floor	Room	Item	Qty	Condition	CRC Number	Asset Decal#
114 Chase Ave #661	2	4	Computer components, 20" monitors	1	Good	123	456

Total Records: 1

**Result:** A new Add/Edit Item window will open pre-filled with all of the same details except for the Asset Decal#, Serial# and Model filled in.

4. Fill in the missing details.
5. Click **Save**.
6. Repeat until all items are entered.



## Importing an Item List

Save time by creating and importing a list of items using the SPMS Excel template.

When you import a list, you must select a building for the list. This cannot be edited after importing, so you need to import a separate list for each building. You can however edit the floor and room after importing.

1. Start a new Surplus Pickup Request.
2. Click **Import Items...**
3. Select **Import from File** from the dropdown.

The screenshot shows the SPMS interface for creating a new Surplus Pickup Request. The 'Import Items...' dropdown menu is open, and 'Import from File' is selected. The interface includes fields for Department, Contact Person, Authorization, Disposal Type, DR#, Date, Status, and Pickup Type. A table with columns Item, Qty, Condition, CRC Number, and Asset Decal# is visible. The 'Total Records: 0' is displayed. Buttons for 'New Surplus Pickup Request', 'Save', 'Cancel', 'Delete', and 'Print' are at the bottom.

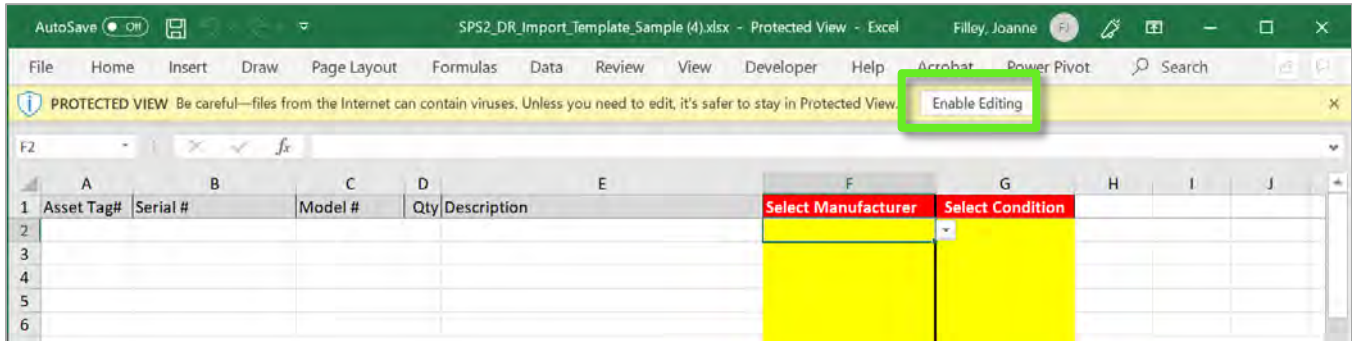
## Create Excel list of items:

1. Click **Download Template**.

The screenshot shows the 'IMPORT ITEMS' dialog box in the SPMS. The 'Download Template' button is highlighted. The dialog box includes fields for Address (Building), Floor, Room, Items Category, and a 'Select File' section with a 'Choose File' button and 'No file chosen' text. The 'Import' and 'Cancel' buttons are at the bottom.

**Result:** The import template will open in Excel.

2. Click **Enable Editing**.



3. Enter the information that you have available into columns **A through E**.

If you have the information already in another spreadsheet you can copy it into the template, just be sure that you don't rearrange, add or remove the columns in the template.

1	Asset Tag#	Serial #	Model #	Qty	Description	Select Manufacturer	Select Condition	
2		SM2001AV6	ThinkPad Pro Dock	1	Docking station			
3		2UA0481FYT	HP Compaq 8000	1	CPU			
4		MJRPBZY	Lenovo ThinkStation E31	1	CPU			
5		2UA8231V22	HP workstation xw4600	1	CPU			
6		Q87070222343	ViewSonic VA903b	1	19" Monitor			
7		2UA32925LS	HP Compaq 8300	1	CPU			

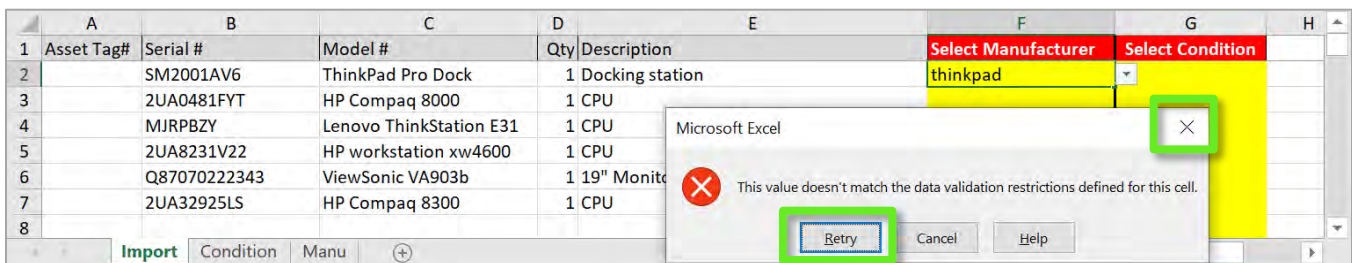
Columns F and G are required, and the information must exactly match the options in AiM.

4. Try typing the name of the manufacturer into column F, then press enter.

**Result:** If the name you type exactly matches the name in the AiM list, the information will be accepted. If the name is not in the list, you will get an error message.

If you get an error:

5. Click **Retry** or close the error window.



### Add the manufacturer name from the list:

1. Open the list of manufacturers by clicking the cell in column F, then click the down-triangle that appears.
2. Scroll to find the manufacturer. In this example “thinkpad” is not in the list because the manufacturer is HP, so you need to search the list for the correct manufacturer name.
3. Select the manufacturer from the list.

1	Asset Tag#	Serial #	Model #	Qty	Description	Select Manufacturer	Select Condition
2		SM2001AV6	ThinkPad Pro Dock	1	Docking station		
3		2UA0481FYT	HP Compaq 8000	1	CPU		
4		MJRPBZY	Lenovo ThinkStation E31	1	CPU		
5		2UA8231V22	HP workstation xw4600	1	CPU		
6		Q87070222343	ViewSonic VA903b	1	19" Monitor		
7		2UA32925LS	HP Compaq 8300	1	CPU		
8							

Import Condition Manu +

### Add the condition of each item:

1. Open the list of condition options by clicking the cell in column G, then click the down-triangle that appears.
2. Select the appropriate condition from the list for each item.

1	Asset Tag#	Serial #	Model #	Qty	Description	Select Manufacturer	Select Condition
2		SM2001AV6	ThinkPad Pro Dock	1	Docking station	HP	Good
3		2UA0481FYT	HP Compaq 8000	1	CPU	HP	
4		MJRPBZY	Lenovo ThinkStation E31	1	CPU	Lenovo	
5		2UA8231V22	HP workstation xw4600	1	CPU	HP	
6		Q87070222343	ViewSonic VA903b	1	19" Monitor	ViewSonic	
7		2UA32925LS	HP Compaq 8300	1	CPU	HP	
8							

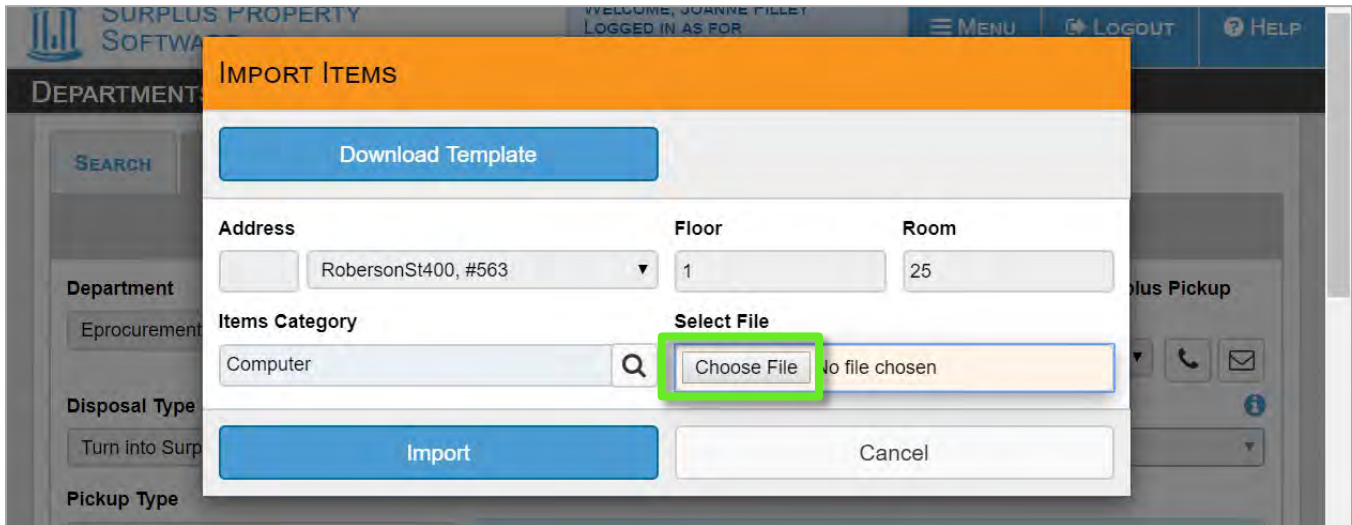
Import Condition Manu +

3. Save the file and return to the SPMS browser window.

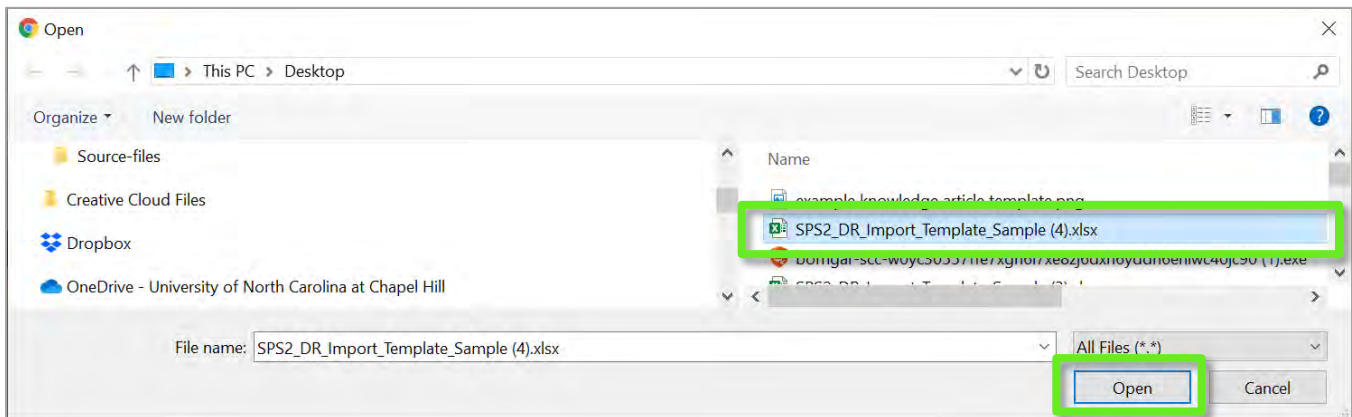


### Complete the import process:

1. If the Import Items pop-up window is not still open, click the **Import Items...** button again and select **Import from File**.
2. Fill in the location details and select a category from the **Items Category** list.
3. Click **Choose File**.



4. Browse to the location where you saved the Excel file.
5. Select the file and click Open.



**Result:** the file name will appear on the Import Items screen.

6. Click **Import**.

The screenshot shows the 'IMPORT ITEMS' dialog box overlaid on the main application interface. The dialog box has an orange header with the title 'IMPORT ITEMS'. Below the header is a 'Download Template' button. The main area contains several input fields: 'Address' with a dropdown menu showing 'RobersonSt400, #563', 'Floor' with a dropdown showing '1', and 'Room' with a dropdown showing '25'. There is also an 'Items Category' dropdown showing 'Computer'. To the right of these fields is a 'Select File' section with a 'Choose File' button and a text box displaying the file name 'SPS2\_DR\_Import...mple (4).xlsx'. At the bottom of the dialog box are two buttons: 'Import' and 'Cancel'. The 'Import' button is highlighted with a green rectangular box.

7. Click OK on the pop-up message.

The screenshot shows a small white pop-up message box. The text inside reads 'spmsspt.its.unc.edu says' followed by 'Data has been imported successfully.' on the next line. In the bottom right corner of the message box is a blue button with the text 'OK'. This button is highlighted with a green rectangular box.

**Result:** The items you imported will be listed on the request.

8. At this point you can add more items or edit the existing items (for example if some of the items you imported were in a different room, you could edit the room number for those items).
9. When your list is complete, save the request.

SEARCH
Add / Edit

Notes: 
Authorized:

**Department**

**Contact Person for this Surplus Pickup Request**

**Who will authorize this Surplus Pickup Request?**

**Disposal Type**

**DR#**

**Date**

**Status**

**Pickup Type**

To ensure pickup by the Surplus Property Office, please list all items for disposal.

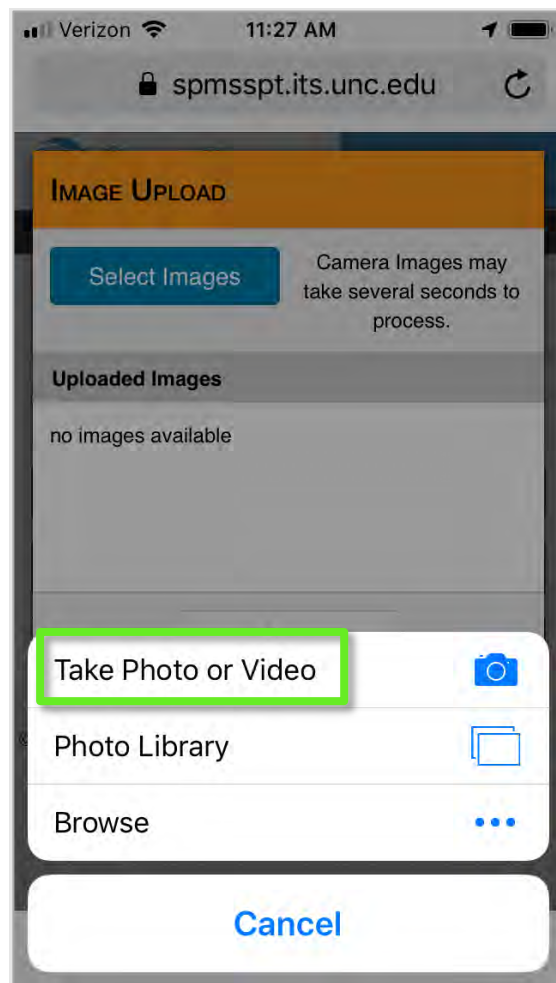
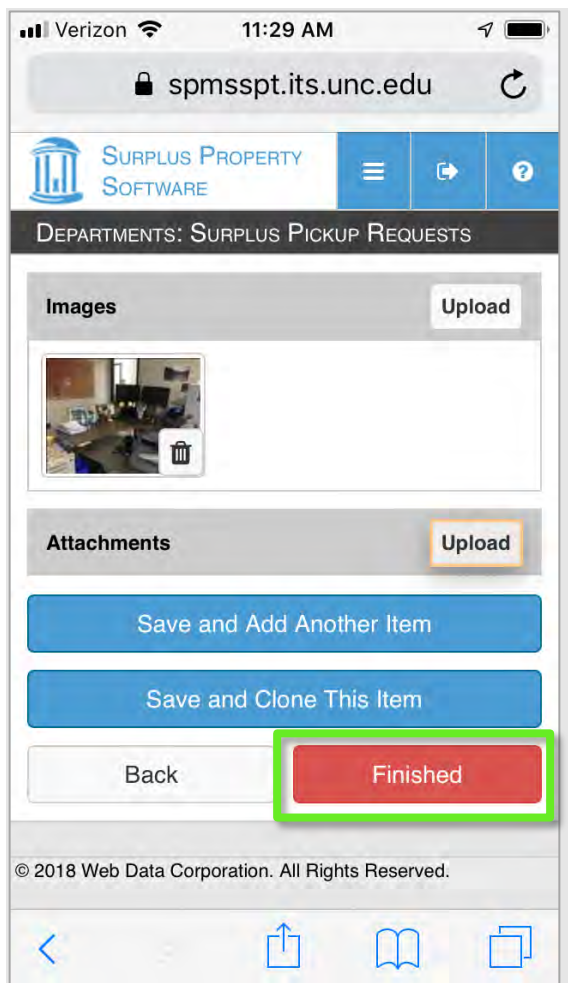
	Building	Floor	Room	Item	Qty	Condition	CRC Number	Asset Decal#	
	RobersonSt400 #563	1	25	Computer, CPU	1	Salvage			
	RobersonSt400 #563	1	25	Computer, 19" Monitor	1	Fair			
	RobersonSt400 #563	1	25	Computer, CPU	1	Fair			
	RobersonSt400 #563	1	25	Computer, CPU	1	Excellent			
	RobersonSt400 #563	1	25	Computer, CPU	1	Excellent			
	RobersonSt400 #563	1	25	Computer, Docking station	1	Good			

Total Records: 6

## Adding Images to a Surplus Pickup Request Using a Mobile Device

SPMS is designed to work on mobile devices. When adding items to a surplus pickup request it can be a great time saver to enter the information and images directly into your device.

1. Open the SPMS in the browser on your mobile device.
2. Follow the steps in the previous chapter for creating requests and adding items.
3. Click the **Upload** button to add an image directly to an item.
4. Click **Take Photo or Video**. Then use your camera controls to shoot the image and add additional images as needed.
5. Click **Finished**.



## Approving Surplus Pickup Requests

Skip this chapter if you are not set up as a Surplus Pickup Request approver.

When a surplus pickup request is submitted that lists you as the approver, you will receive an email with the request details. You may need the request number to find the request, so keep it handy.

### To approve or modify the request, login to the SPMS (see page 3 for help).

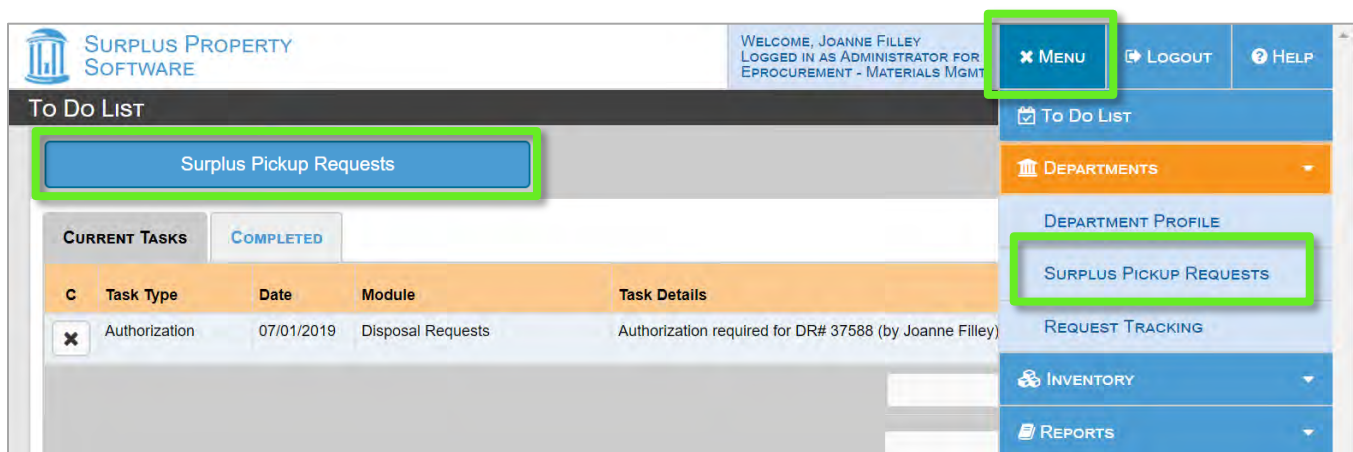
The **To Do** list on the home page will list all of the items that need your attention, but the items do not have active links to take you to the edit screen.

### To get to the list of active surplus pickup requests:

**Option 1:** If you are on the To Do List, click the **Disposal Request** button. (A disposal request is the same as a surplus pickup request).

**Option 2:** From any screen:

1. Click Menu at the top of the screen.
2. Click Departments from the open menu.
3. Click Surplus Pickup Requests from the Departments list.








**Result:** The **Search** tab will display all of the department's active requests.

4. If list is long, enter the request number into the **Search by** > Surplus Pickup Request Number box.
5. Click the pencil icon on the request that you need to approve.

#### Request List Status Indicators

-  the request has been approved.
-  the request has been submitted for review, but has not been authorized.
-  the request has not been submitted for review.

SEARCH

ADD / EDIT

Department

Eprocurement - Materials Mgmt #213640

Search by

Surplus Pickup Request Number

Disposal Type

All

Status



















Pending

Search

Cancel


New Surplus Pickup Request

Alt+N

A	Department	Disposal Type	DR#	Date	Status	Creator	Authorizer	
	Eprocurement - Materials Mgmt	Turn into Surplus	37593	07/11/2019	Pending	Joanne Filley	Joanne Filley	 
	Eprocurement - Materials Mgmt	Turn into Surplus	37592	07/11/2019	Pending	Samuel Walker	Samuel Walker	 
	Eprocurement - Materials Mgmt	Turn into Surplus	37591	07/11/2019	Pending	Joanne Filley	Joanne Filley	 
	Eprocurement - Materials Mgmt	Turn into Surplus	37590	05/07/2019	Pending	Joanne Filley	Joanne Filley	 
	Eprocurement - Materials Mgmt	Turn into Surplus	37589	06/28/2019	Pending	Joanne Filley	Joanne Filley	 
	Eprocurement - Materials Mgmt	Turn into Surplus	37588	07/01/2019	Pending	Joanne Filley	Joanne Filley	 



Total Records: 6

**Result:** The request will open with an **Authorized** box at the top of the screen.

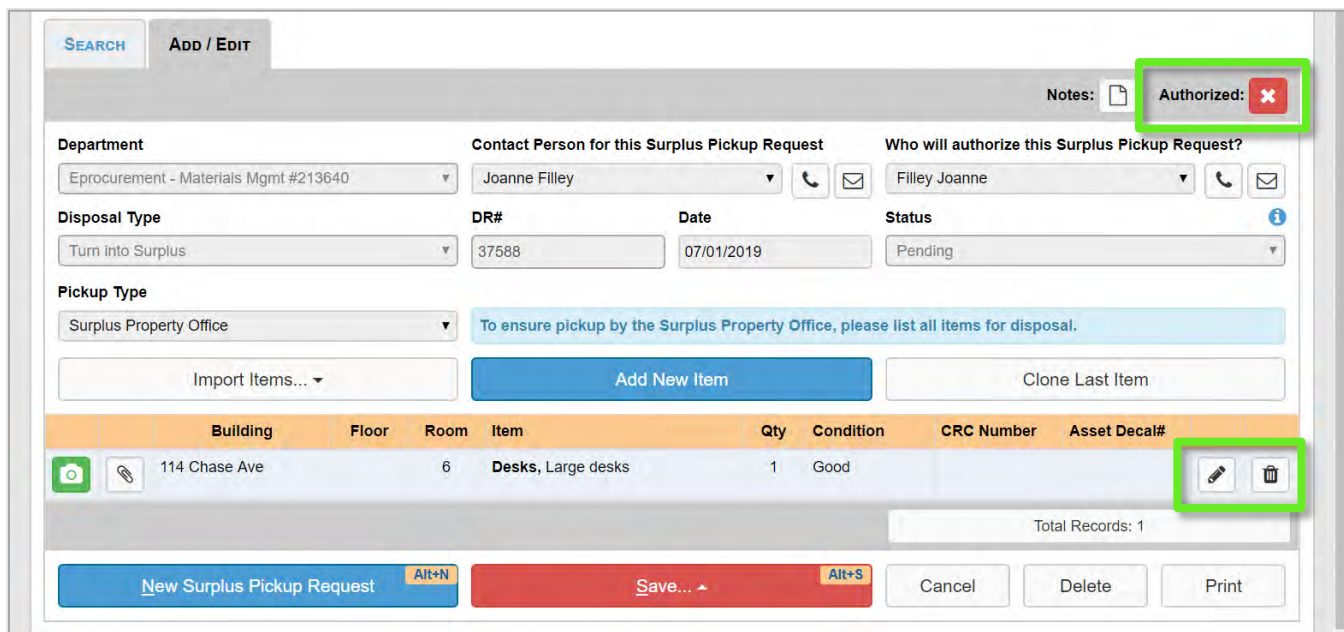
Authorized: 

You will use this box to authorize the request when ready. If you are not the designated authorizer for the request, the Authorized box will not appear.

### Authorized Indicators

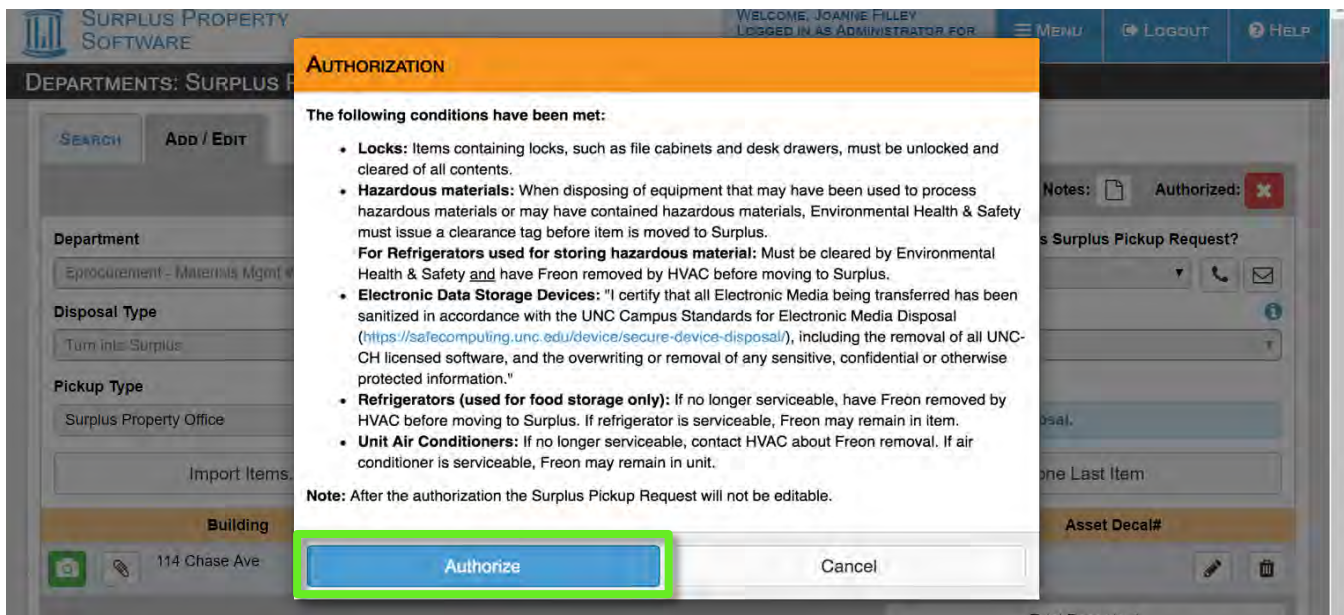
-  the request has been authorized.
-  the request has not been authorized.

4. Make any necessary edits to the request. If an item needs to be edited or removed, click the pencil or trash icon in the item list.
5. Click the red x to authorize the request.



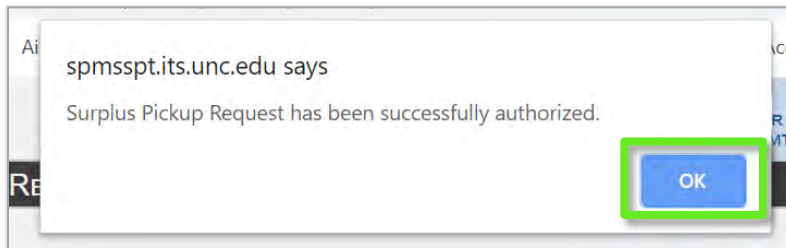
The screenshot shows the 'Add / Edit' form for a Surplus Pickup Request. At the top right, there is a 'Notes' section and an 'Authorized' box with a red X icon. The form includes fields for Department (Eprocurement - Materials Mgmt #213640), Contact Person (Joanne Filley), Who will authorize (Filley Joanne), Disposal Type (Turn into Surplus), DR# (37588), Date (07/01/2019), Status (Pending), and Pickup Type (Surplus Property Office). Below these fields is a table with columns: Building, Floor, Room, Item, Qty, Condition, CRC Number, and Asset Decal#. The table contains one row: Building 114 Chase Ave, Floor 6, Room 6, Item Desks, Large desks, Qty 1, Condition Good. To the right of the table row are icons for edit (pencil) and delete (trash). At the bottom of the form are buttons for 'New Surplus Pickup Request', 'Save...', 'Cancel', 'Delete', and 'Print'.

6. Review the Authorization message, then click **Authorize**.



The screenshot shows the same Surplus Property Management System interface as before, but with an 'AUTHORIZATION' dialog box open. The dialog box contains the following text: 'The following conditions have been met:'. It lists several conditions: Locks, Hazardous materials, Refrigerators used for storing hazardous material, Electronic Data Storage Devices, Refrigerators (used for food storage only), and Unit Air Conditioners. Below the list is a note: 'Note: After the authorization the Surplus Pickup Request will not be editable.' At the bottom of the dialog box are two buttons: 'Authorize' and 'Cancel'. The 'Authorize' button is highlighted with a green box.

7. Click **OK** on the confirmation pop-up message.



8. Click the print icon in the request row to print the form.



9. Sign and date the hardcopy request form and have it available with the items that are to be picked up, or if you are delivering the items to the surplus warehouse, be sure to take it with you.



## Request Tracking

This report shows a list all of all surplus pickup requests that the user has access to. This report is similar to the Surplus Pickup Request Search screen, but it allows you to close out requests after they are marked **Completed** by the Surplus Warehouse.

1. Click **Menu** at the top of the screen.
2. Click **Departments** from the open menu.
3. Click **Request Tracking** from the departments list.

The screenshot displays the Surplus Property Software interface. At the top, the header includes the logo, user name 'JOANNE FILLEY', and role 'ADMINISTRATOR FOR EPROCUREMENT - MATERIALS MGMT'. Navigation buttons for 'MENU', 'LOGOUT', and 'HELP' are present. A sidebar on the right shows a 'To Do List' with options: 'DEPARTMENTS', 'DEPARTMENT PROFILE', 'SURPLUS PICKUP REQUESTS', and 'REQUEST TRACKING' (highlighted with a green box). The main content area features a 'To Do List' section with a 'Surplus Pickup Requests' button. Below this, there are tabs for 'CURRENT TASKS' and 'COMPLETED'. A table lists tasks with columns: 'C', 'Task Type', 'Date', 'Module', and 'Task Details'. A task is shown with 'Authorization' as the type, '07/01/2019' as the date, 'Disposal Requests' as the module, and 'Authorization require Filley)' as the details.

C	Task Type	Date	Module	Task Details
X	Authorization	07/01/2019	Disposal Requests	Authorization require Filley).

**Result:** The list of Surplus Pickup Requests displays on the screen. The status column indicates:

- **Pending:** Waiting for department approval or pickup scheduling by Surplus Property.
- **In Progress:** Scheduled for pickup, but not received into the Surplus Property Warehouse.
- **Completed:** Received by the Surplus Property Warehouse.
- **Closed:** Completed and closed by the department.

4. Select the appropriate **Department** if necessary.

- To view or print request details, click the print icon. Close any completed requests by clicking the **x** in the **C** column

**SURPLUS PROPERTY SOFTWARE** WELCOME, JOANNE FILLEY  
LOGGED IN AS ADMINISTRATOR FOR EPROCUREMENT - MATERIALS MGMT

**SURPLUS PICKUP REQUEST TRACKING**

**SURPLUS PICKUP REQUESTS** [LINE ITEMS](#)

Department: **Eprocurement - Materials Mgmt #213640** Please mark the Surplus Pickup Requests as Closed once all items have been received by Surplus Property Office.

C	Disposal Type	DR#	Date	Contact Person	Authorized by	Status	
	Turn into Surplus	37594	07/12/2019	Filley Joanne	Filley Joanne	Pending	
	Turn into Surplus	37593	07/11/2019	Filley Joanne	Filley Joanne	In Progress	
	Turn into Surplus	37592	07/11/2019	Walker Samuel	Walker Samuel	In Progress	
	Turn into Surplus	37591	07/11/2019	Filley Joanne	Filley Joanne	Pending	
	Turn into Surplus	37590	05/07/2019	Rupert Joanne	Filley Joanne	In Progress	
	Turn into Surplus	37589	06/28/2019	Filley Joanne	Filley Joanne	Completed	
	Turn into Surplus	37588	07/01/2019	Filley Joanne	Filley Joanne	In Progress	

Total Records: 7

[Print](#)

- Click **OK** to verify that you want to mark the request Closed.

spmsspt.its.unc.edu says

Are you sure you want to mark this Surplus Pickup Request as Closed?

**OK** [Cancel](#)

**Result:** The status will update to **Closed**.

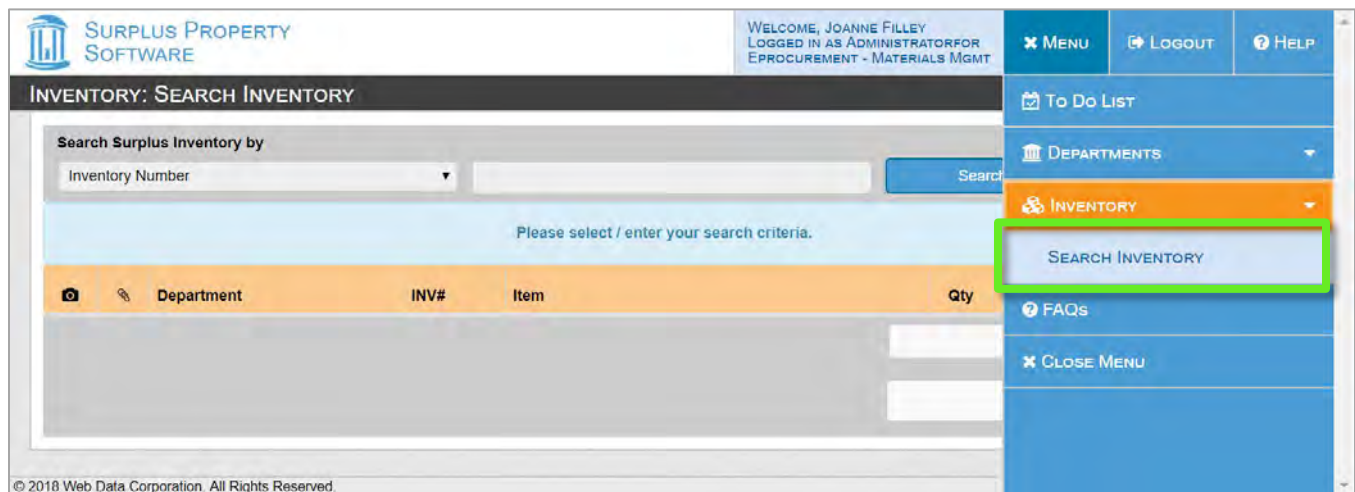
Turn into Surplus	37590	05/07/2019	Rupert Joanne	Filley Joanne	In Progress	
Turn into Surplus	37589	06/28/2019	Filley Joanne	Filley Joanne	Closed	
Turn into Surplus	37588	07/01/2019	Filley Joanne	Filley Joanne	In Progress	

## Searching for Inventory

The Inventory search lists every surplus item from all departments. It allows you to review the items in your department's previous requests, and to search for items currently for sale at the Surplus Property Warehouse.

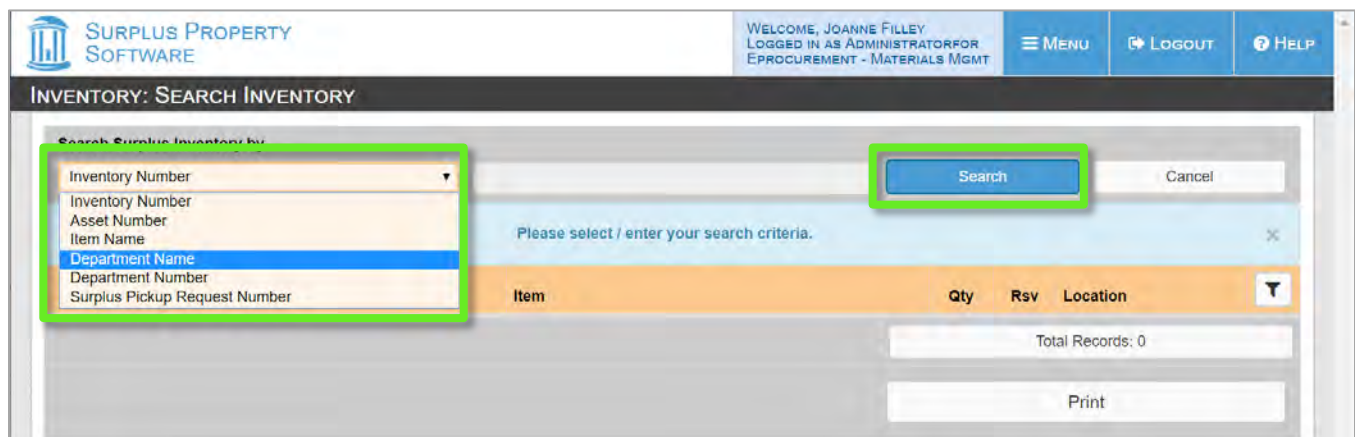
### View Your Department's Surplus History

1. Click **Menu** at the top of the screen.
2. Click **Inventory** from the open menu.
3. Click **Search Inventory** from the inventory list.



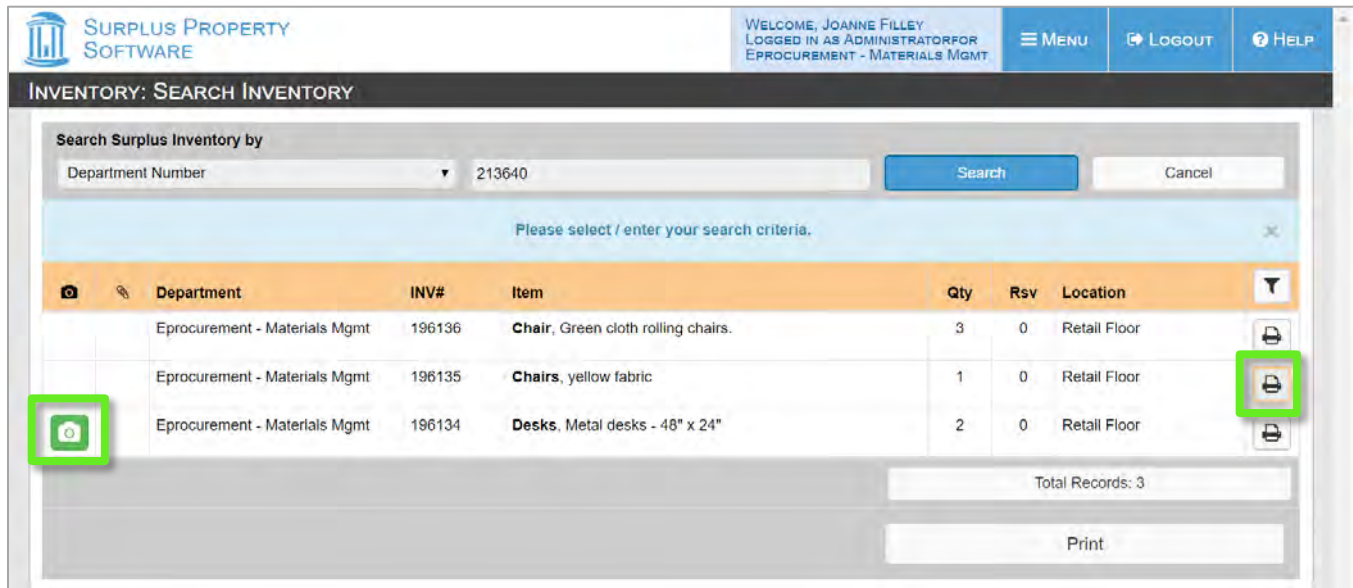
The screenshot shows the 'SURPLUS PROPERTY SOFTWARE' interface. At the top, there is a header with the logo, a welcome message for 'JOANNE FILLEY', and navigation buttons for 'MENU', 'LOGOUT', and 'HELP'. Below the header, the main section is titled 'INVENTORY: SEARCH INVENTORY'. It features a search form with a dropdown menu labeled 'Search Surplus Inventory by' and a text input field. A 'Search' button is next to the input field. Below the search form, there is a table with columns: 'Department', 'INV#', 'Item', and 'Qty'. A sidebar on the right contains a 'To Do List' and a 'DEPARTMENTS' dropdown menu. The 'INVENTORY' option is selected in the dropdown, and the 'SEARCH INVENTORY' option is highlighted in a green box.

4. Select **Department Name** or **Department Number** from the **Search Surplus Inventory by** drop-down.
5. Enter your department name or number into the text box.
6. Click **Search**.



The screenshot shows the 'SURPLUS PROPERTY SOFTWARE' interface. At the top, there is a header with the logo, a welcome message for 'JOANNE FILLEY', and navigation buttons for 'MENU', 'LOGOUT', and 'HELP'. Below the header, the main section is titled 'INVENTORY: SEARCH INVENTORY'. It features a search form with a dropdown menu labeled 'Search Surplus Inventory by' and a text input field. A 'Search' button is next to the input field. Below the search form, there is a table with columns: 'Item', 'Qty', 'Rsv', and 'Location'. A 'Total Records: 0' label is displayed below the table. A 'Print' button is at the bottom right. The 'Department Name' option is selected in the dropdown menu, and the 'Search' button is highlighted in a green box.

7. To view or print the item details, click the print icon.
8. To view a picture of the item (when available), click the camera icon.



**SURPLUS PROPERTY SOFTWARE**

WELCOME, JOANNE FILLEY  
LOGGED IN AS ADMINISTRATOR FOR  
EPROCUREMENT - MATERIALS MGMT

≡ MENU LOGOUT ? HELP

**INVENTORY: SEARCH INVENTORY**

Search Surplus Inventory by

Department Number 213640 Search Cancel

Please select / enter your search criteria.

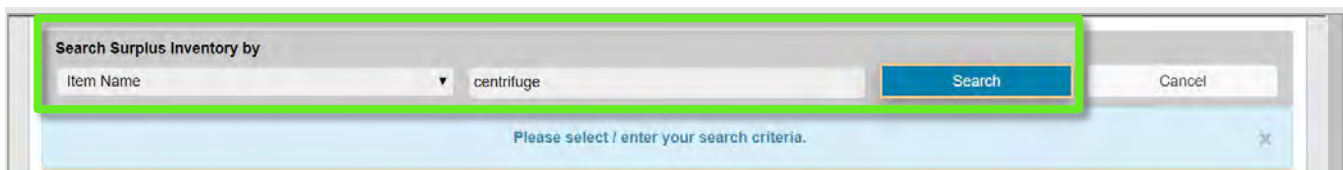
	Department	INV#	Item	Qty	Rsv	Location	
	Eprocurement - Materials Mgmt	196136	Chair, Green cloth rolling chairs.	3	0	Retail Floor	
	Eprocurement - Materials Mgmt	196135	Chairs, yellow fabric	1	0	Retail Floor	
	Eprocurement - Materials Mgmt	196134	Desks, Metal desks - 48" x 24"	2	0	Retail Floor	

Total Records: 3

Print

## Find Items to Buy from the Surplus Warehouse

1. Click **Menu** at the top of the screen.
2. Click **Inventory** from the open menu.
3. Click Search Inventory from the inventory list.
4. Select **Item Name** from the **Search Surplus Inventory by** drop-down.
5. Enter a key word into the text box
6. Click **Search**.



Search Surplus Inventory by

Item Name centrifuge Search Cancel

Please select / enter your search criteria.

## Filtering the Inventory List

Depending on the key word you chose, the result may be a very long list. You can filter the list down to only show items that are currently available in the warehouse inventory.













7. Click the filter icon.

Search Surplus Inventory by

Item Name

Please select / enter your search criteria.

Department	INV#	Item	Qty	Rsv	Location	
Procurement Svcs Operations	99348	Centrifuge, Centrifuge	1	0		
Office of Dean	98770	Centrifuges, CENTRIFUGE Asset# 393323 Serial# 40507324 Model LEGEND MACH 1.6R Manufacturer SORVALL	0	0	Pallet20	
Environ Sci Engineering - Ops	97888	Centrifuge, Microcentrifuge Serial# 405232	0	0	Pallet10	
Thurston Arthritis Res Center	97604	Centrifuge, Hettich Mikro 22R in 4122	0	0	Pallet06	
Enviro Med Asthma and Lung Blo	97560	Centrifuge, Centrifuge (Brand: Eppendorf) Serial# R000154 Model 5403	0	0	Pallet02	
Pharmacology	96328	Centrifuge, Micro Serial# E1096 Model VSB14	0	0	Pallet10	
Biology	96281	Centrifuge, Metal Tag # 08979 Asset# 317651 Serial# 29101223 Model RC1010 Manufacturer JOUAN	0	0	Pallet13	
Procurement Svcs Operations	96216	Centrifuge, Eppendorf Centrifuge 5415D Serial# 5425-48743	0	0	Pallet06	
Procurement Svcs Operations	96213	Centrifuge, Eppendorf Centrifuge 5415C Serial# 5415023701	0	0	Pallet06	
Procurement Svcs Operations	96205	Centrifuge, Eppendorf Centrifuge 5415C Serial# 5415-92907	0	0	Pallet06	

Total Records: 664

8. Enter a 1 into the **Qty** box.

**Result:** The screen will update automatically to show the results.






**Note:** this only shows items that have exactly one in inventory. Change the 1 to another number to check for more results.

9. Click the print icon to see a sheet with more details about the item, which you can print if you want.

**Search Surplus Inventory by**

Item Name

Please select / enter your search criteria.

Y/N	Y/N	Department	INV#	Item	Qty	Rsv	Location	
		Procurement Svcs Operations	99348	Centrifuge, Centrifuge	1	0		
		Neuroscience Center	195799	Centrifuges, Eppendorf Centrifuge 5415D	1	0	Pallet02	
		Surgery	194779	Centrifuge, Fisher Scientific Centrifuge Model 228 Centrifuge. In box under desk. Direct Contact - Kim Kennedy at 919-966-5052 or kimberly_kennedy@med.unc.edu 2 stickers on it: UNCH Medical ENG 15905-0 and Service performed sticker 1/07	1	0		
		Lineberger Compr Cancer Center	193185	Centrifuges, CENTRIFUGE Serial# 5426ZM533930	1	0		
		SOP-Office of the Dean	192816	Centrifuges, CENTRIFUGE ( NOTE: BRING A PALLET JACK TO LOAD THIS ITEM)	1	0		

**Important:** If you find an item you want to buy, it is best to call the Surplus Warehouse to verify that the item is available before going to the warehouse.

## Managing User Roles

### Add a New User

The easiest way to add departmental managers, users and additional administrators is to submit the forms listed on page 2 to your ARC. However, administrators do have access to add users, assign users to a department, and modify user's rights if needed.

1. Go to **Menu > Departments > Department Profile**.
2. Click the **Users** tab.
3. Click **New User**.

DEPARTMENTS: DEPARTMENT PROFILE

DEPARTMENT: **Users**

Eprocurement - Materials Mgmt

Individual Name	Title	Security Level	Phone	E	
Joanne Filley	Senior Training & Documentation Analyst	Administrator	(919) 962-6458		
Janet Rupert	Director	Administrator	(919) 843-5098		
Samuel Walker	Application Analyst	Administrator	(919) 445-9412		

Total Records: 3

**New User** Alt+N

4. Fill in the user's name and email address, making sure they exactly match the information in the UNC directory.
5. Select a **Security Level** from the list.

6. Add one or more telephone numbers.

DEPARTMENT USER

Assign Existing User

Notes:

First Name: Alex, Last Name: Hoppe, Job Title: Training Specialist

Email: amhoppe@email.unc.edu

Security Level: Administrator, Manager, User

Phones: Add New

Save Cancel

**Result:** After you save the telephone number, the **Authorized for** section will update to show whether the user is authorized to approve requests for the listed department. By default, managers and users will have a red x indicating that they are not authorized.

**Note:** If you want the user to be able to approve requests, click the red x and it will turn into a green checkmark.

7. Click **Save**.

DEPARTMENT USER

Assign Existing User

Notes:

First Name: Alex, Last Name: Hoppe, Job Title: Training Specialist

Email: amhoppe@email.unc.edu

Security Level: Administrator

Authorized for: Dept# 213640 Eprocurement - Materials Mgmt

Phones: (919) 962-3352 Phone

Save Cancel



If this user needs to have access or approval authority for more than one department, send an email to [assets\\_team@unc.edu](mailto:assets_team@unc.edu) and provide the user's:

- Name and Email as found in the campus directory.
- Job Title.
- Phone Number.
- Name of additional department.
- Security level requested (administrator, manager, user).
- Authorization permission (Y or N).

## Editing User Roles

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

1. Go to **Menu > Departments > Department Profile > Users** tab.
2. Click the pencil icon for the user whose role you need to change.

**Note:** you can also remove a user from this screen by clicking the trash can icon.

DEPARTMENT

USERS

Eprocurement - Materials Mgmt

Individual Name	Title	Security Level	Phone	E	
Joanne Filley	Senior Training & Documentation Analyst	Administrator	(919) 962-6458		
Alex Hoppe	Training Specialist	Administrator	(919) 962-3352		
Janet Rupert	Director	Administrator	(919) 843-5098		
Samuel Walker	Application Analyst	Administrator	(919) 445-9412		

Total Records: 4

New User

Alt+N

3. Revise the Department User settings as needed.
4. Click **Save**.

The screenshot shows the 'DEPARTMENT USER' form in the Surplus Property Management System. The form is titled 'DEPARTMENT USER' and has a sub-header 'Assign Existing User'. The form contains the following fields and sections:

- Assign Existing User:** A dropdown menu with 'Select:' and a search icon.
- Notes:** A text area with a document icon.
- First Name:** A text field containing 'Alex'.
- Last Name:** A text field containing 'Hoppe'.
- Job Title:** A text field containing 'Training Specialist'.
- Email:** A text field containing 'amhoppe@email.unc.edu'.
- Security Level:** A dropdown menu with 'Administrator' selected.
- Phones:** A section with a green checkmark icon, a text field containing '(919) 962-3352 Phone', and an 'Add New' button.
- Authorized for:** A section with a red 'X' icon and a text field containing 'Dept# 213640 Eprocurement - Materials Mgmt'.
- Save:** A blue button with a green border, highlighted by a green box.
- Cancel:** A grey button.

The background shows a list of users under the 'Eprocurement - Materials Mgmt' department, including Joanne Filley, Alex Hoppe, Janet Rupert, and Samuel Walker. The footer of the page reads '© 2018 Web Data Corporation. All Rights Reserved.'

## Editing the Department Profile

New department profiles are created and approved by the Surplus Property Office, but department details can be modified by the department administrator.

1. Go to **Menu > Departments > Department Profile > Department** tab.
2. Use the **Add New** buttons and the pencil and trash can icons to make your changes.
3. Click **Save**.

DEPARTMENT USERS

Notes: Approved: ☒

Initial department registrations require 24 hours for approval before placing Surplus Pickup Requests.

Dept#	Department Name	Short Name	Parent Department
213640	Eprocurement - Materials Mgmt	StratSupp	University of North Carolina, Chapel Hill

Addresses

<input checked="" type="checkbox"/>	Admin Off Bldg #607, 104 Airport Drive, Chapel Hill NC, 27599
-------------------------------------	---

Phones

<input checked="" type="checkbox"/>	(919) 962-6267 Dept. Main Phone
-------------------------------------	---------------------------------

Department Accounts

UNCCH 20170 537210 213640 12001
UNCCH 20170 538110 213640 12001

Save Alt+S Cancel Delete Print

## Get Help

If you need help with the Surplus Property Management System call 919-962-HELP and the issue will be routed appropriately.