FINANCE AND OPERATIONS
Finance

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.

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v. 6/16/23

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 my 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

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.

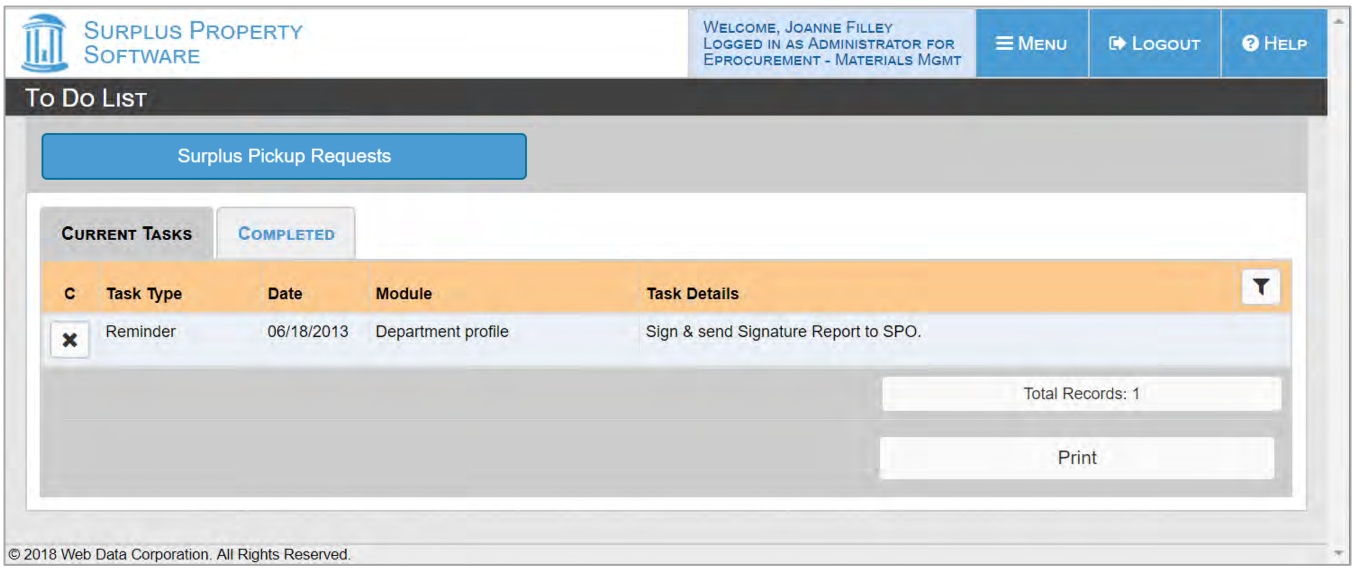
- Access Request Form
- SPMS Registration Form

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.**

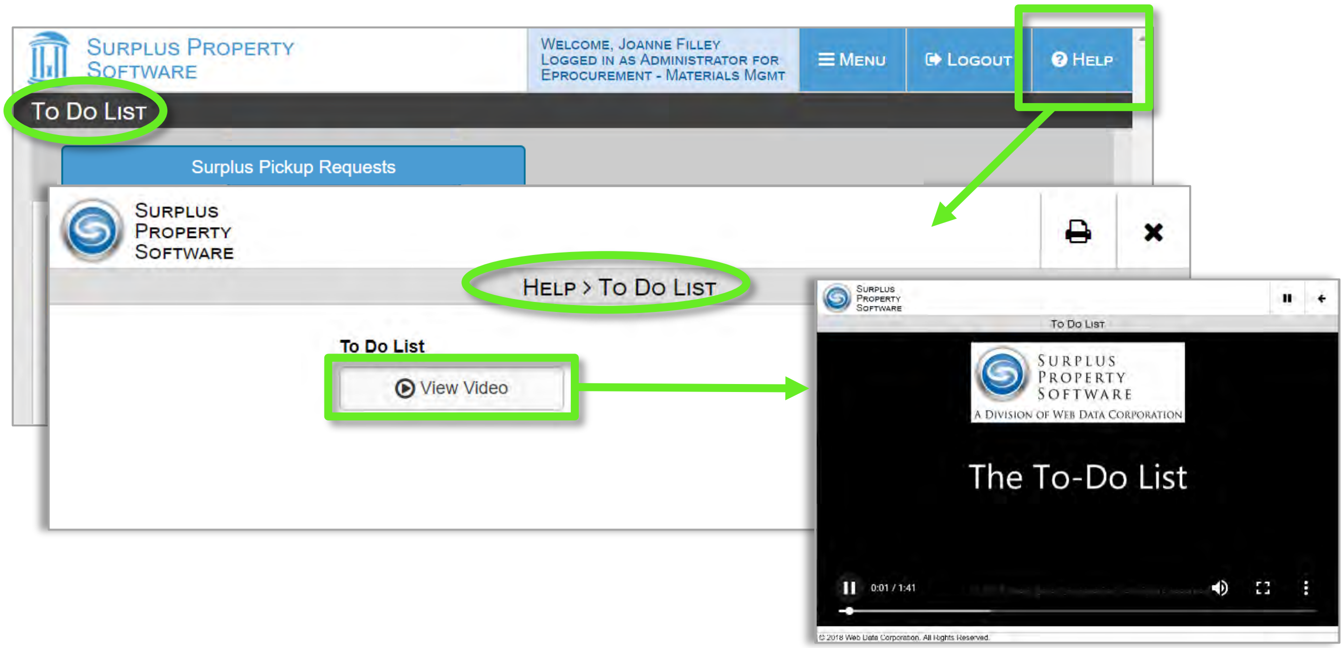


Using Context Sensitive Help Videos

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.

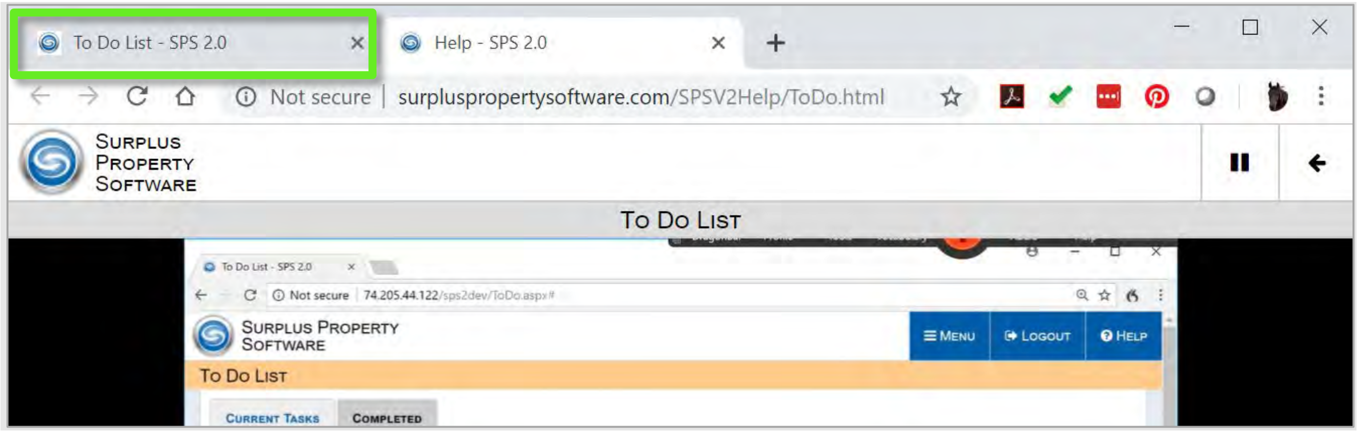
2. Click View Video to start the video.



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.

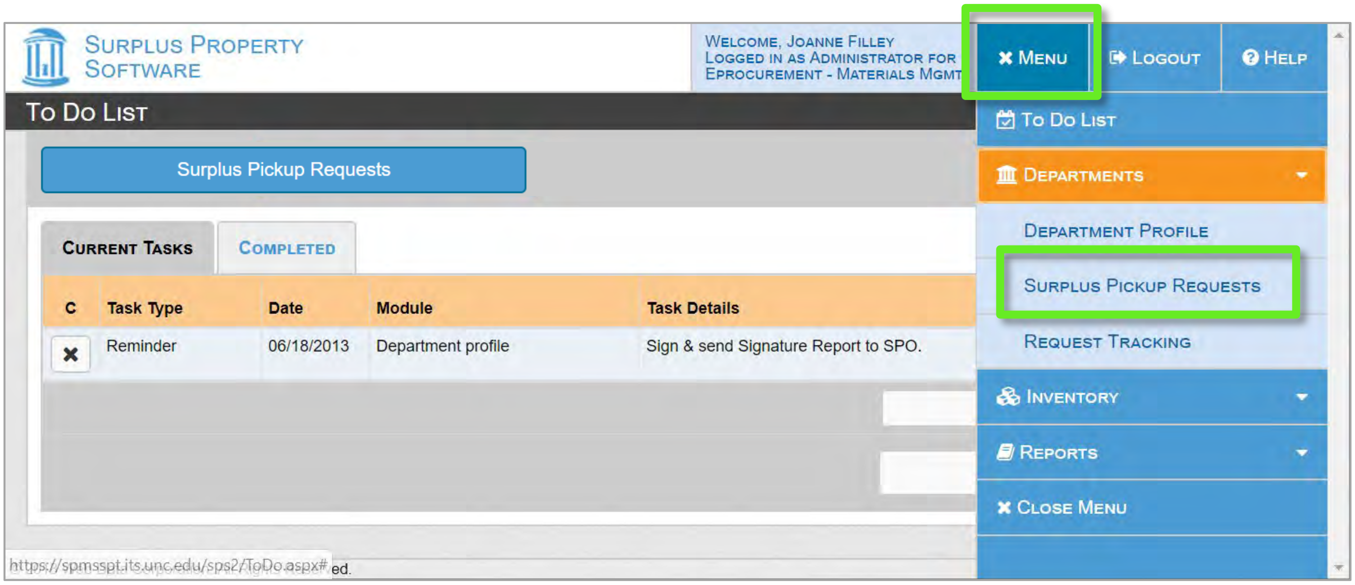
Video	UNC SPMS
Disposal Request	Is called Surplus Pickup Request on some screens. Process is the same.
Says you can approve or modify a request using the link in the notification email.	Due to security concerns, the UNC notifications do not include links. You will need to log in to SPMS to review or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

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



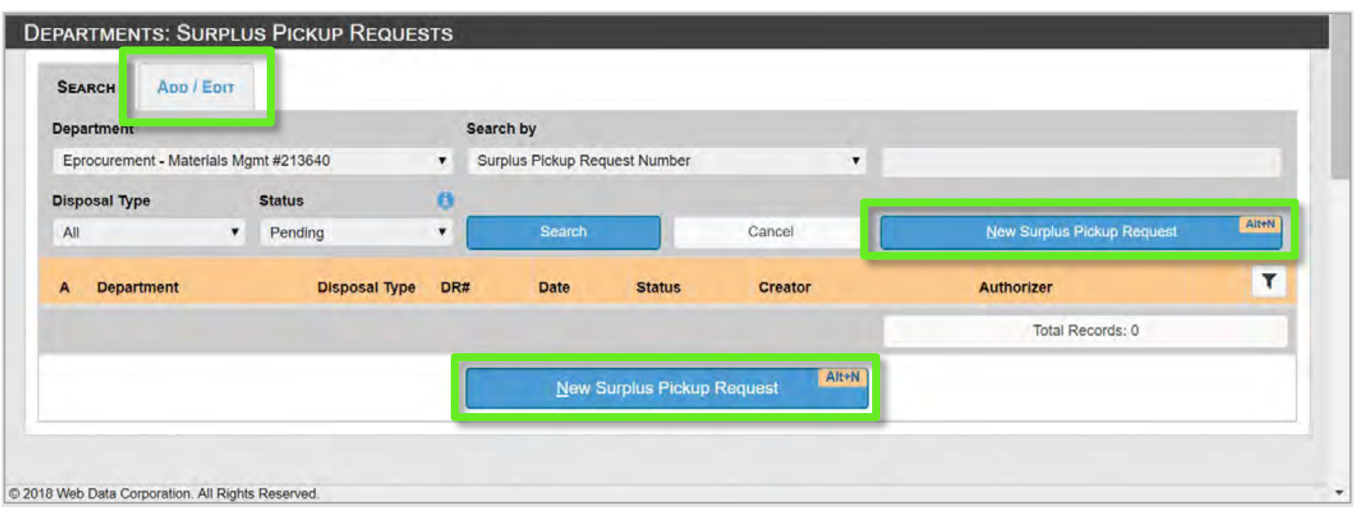
Creating Surplus Pickup Requests

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:

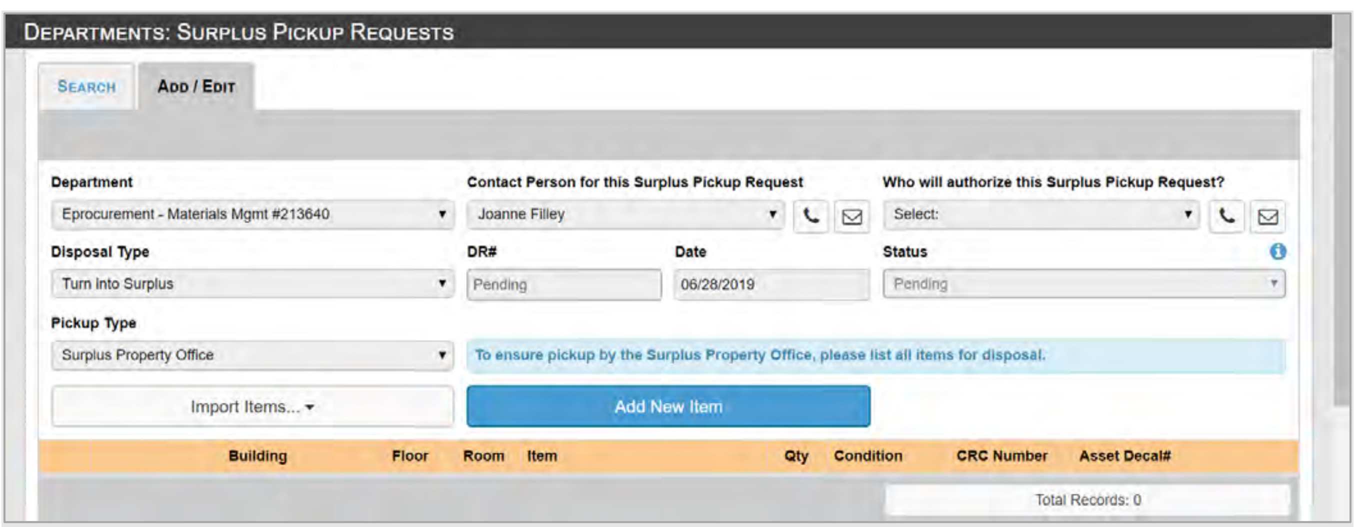
- Select **Surplus Property Office** to request a pick-up
- Select **Self-Delivery** if the contact will be taking the items to the warehouse.You will need to add the **Req. Delivery Date** and **Estimated Time**. The warehouse will contact you if there are any problems with your delivery time.

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.

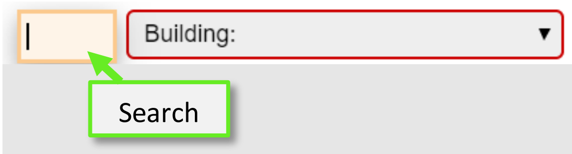
1. Click **Add New Item**.



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.

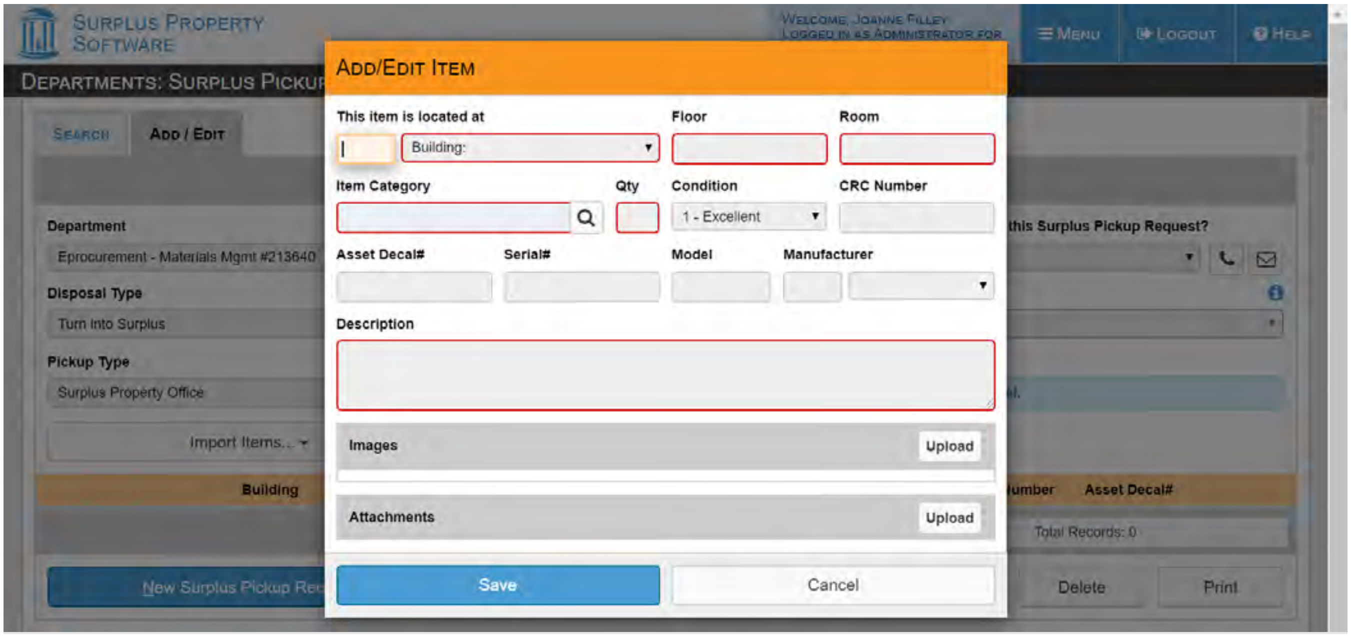
Manufacturer: Enter the manufacturer's name. Doing so may prepopulate the next field. If it does not pre-populate, disregard.

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.

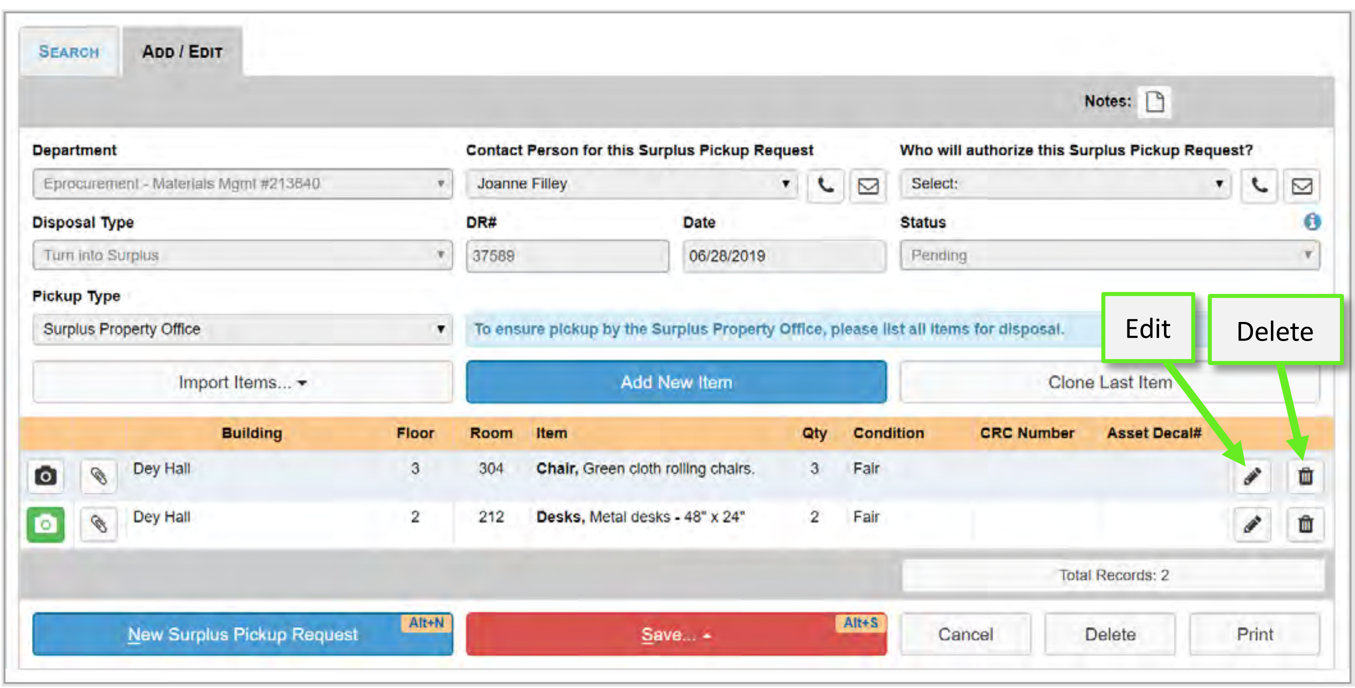
Attachments: Used to include any additional information that would be helpful in processing the request.

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

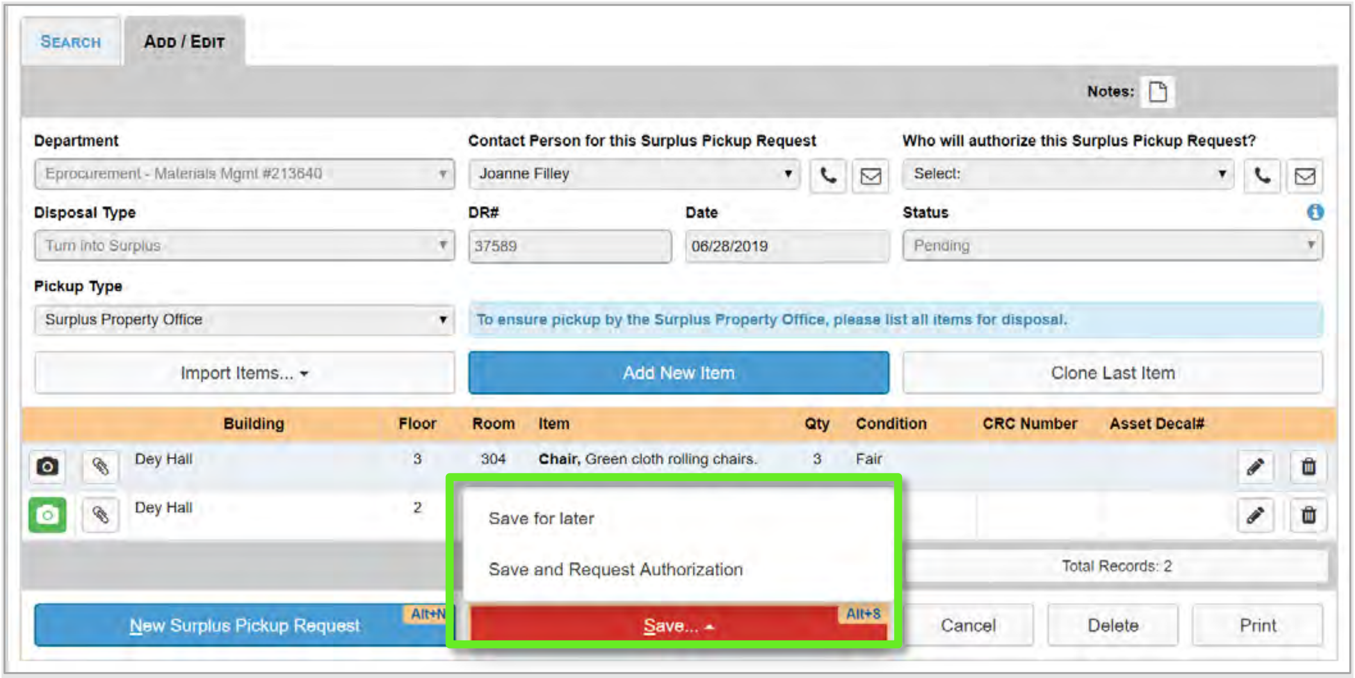


Result: The items you have added will appear on the pickup request screen.

- 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.



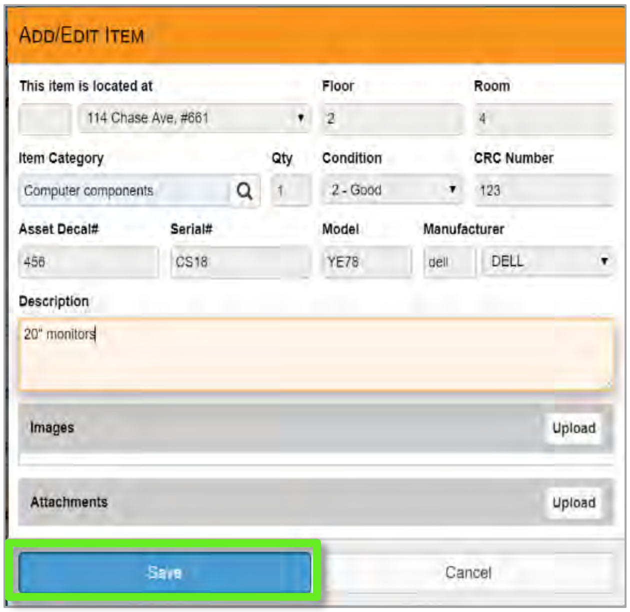
4. Click the red **Save** button at the bottom of the request.
5. From the menu that pops up, select either:
   - **Save for later** if you need to make additional changes.
   - **Save and Request Authorization**.



Cloning an Item

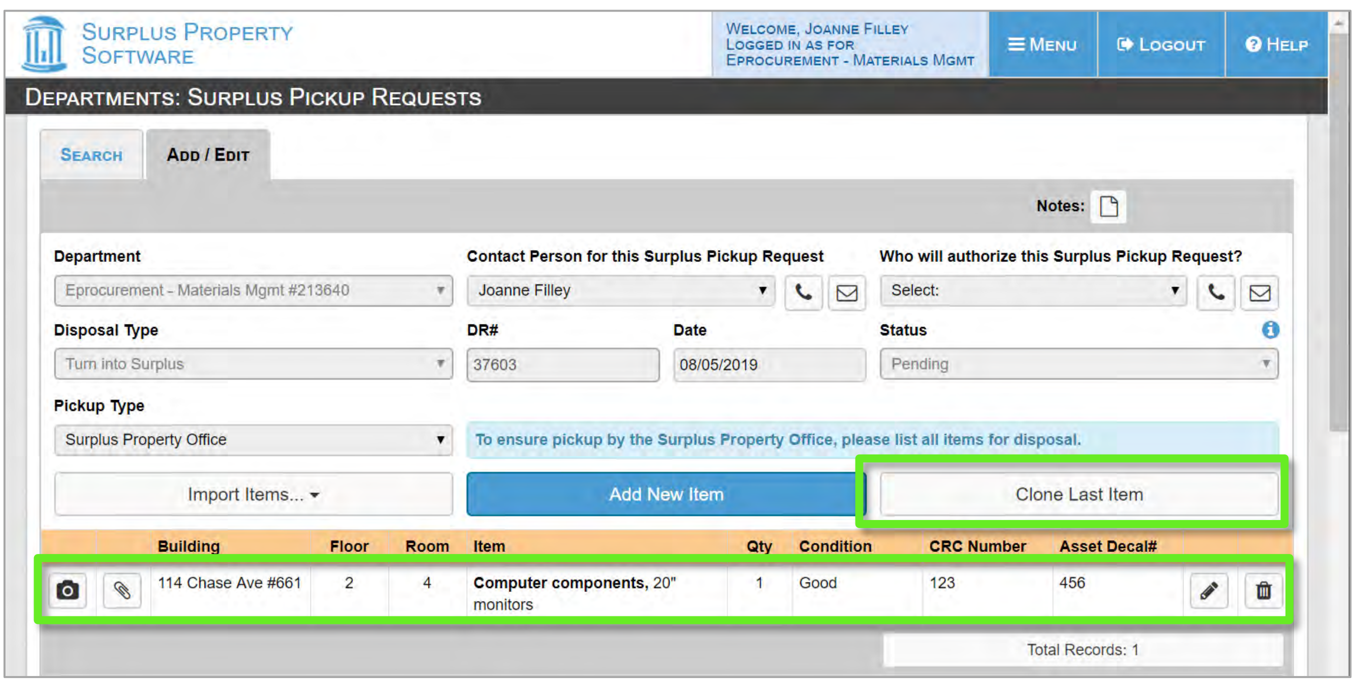
When adding multiple similar items that cannot be grouped because they have important unique details, such as CRC or Serial numbers that need to be entered, you can save time by using the Clone tool.

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



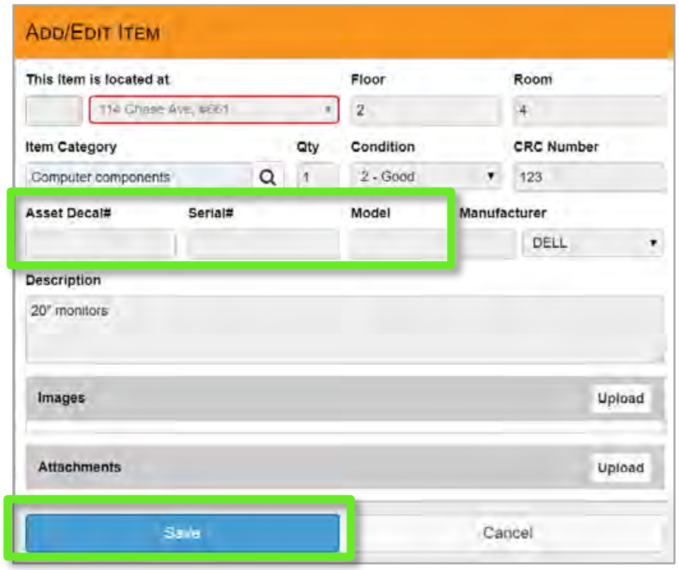
Result: The new item will appear in the item list.

3. Click **Clone Last Item**.



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.

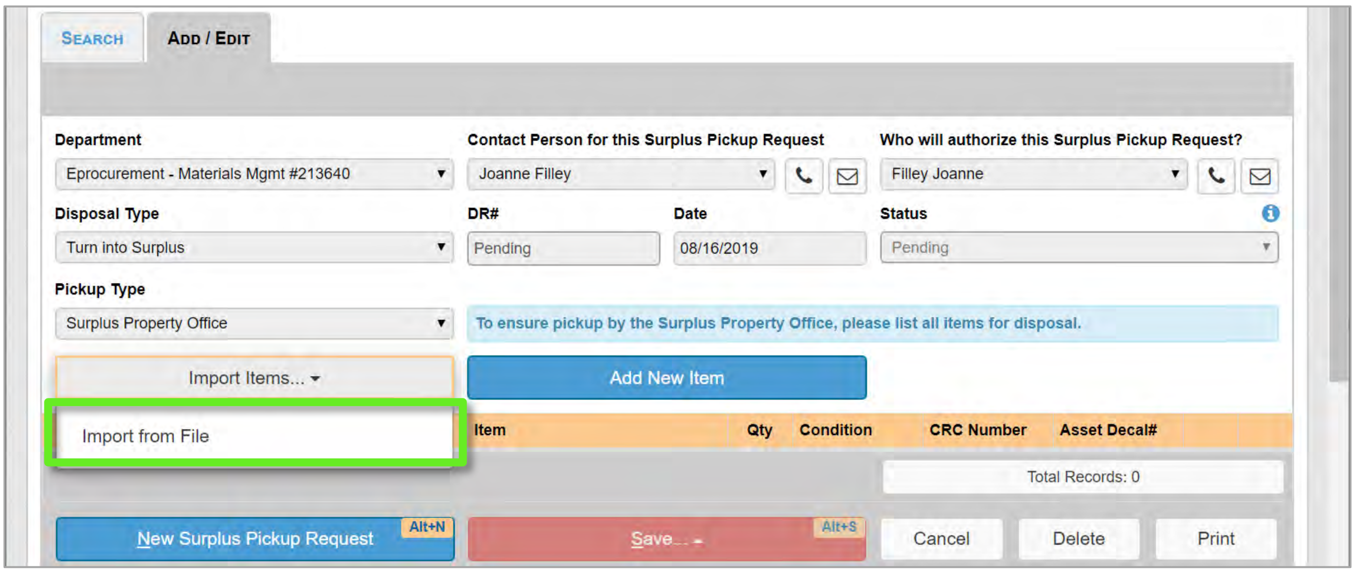


Importing an Item List

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

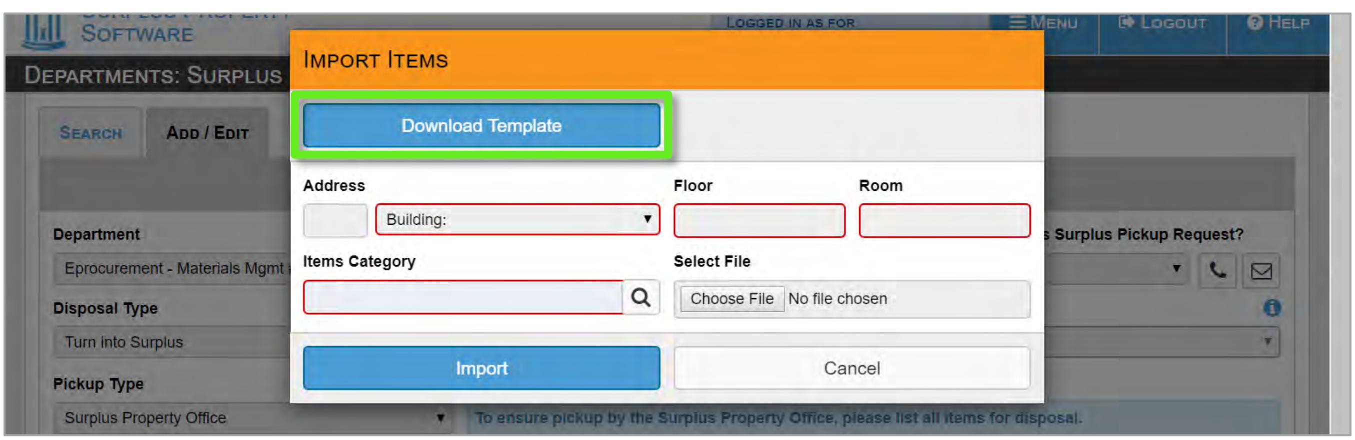
When you import a list, you must select a building for the list. This cannot be edited after importing, so you need to import a separate list for each building. You can however edit the floor and room after importing.

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



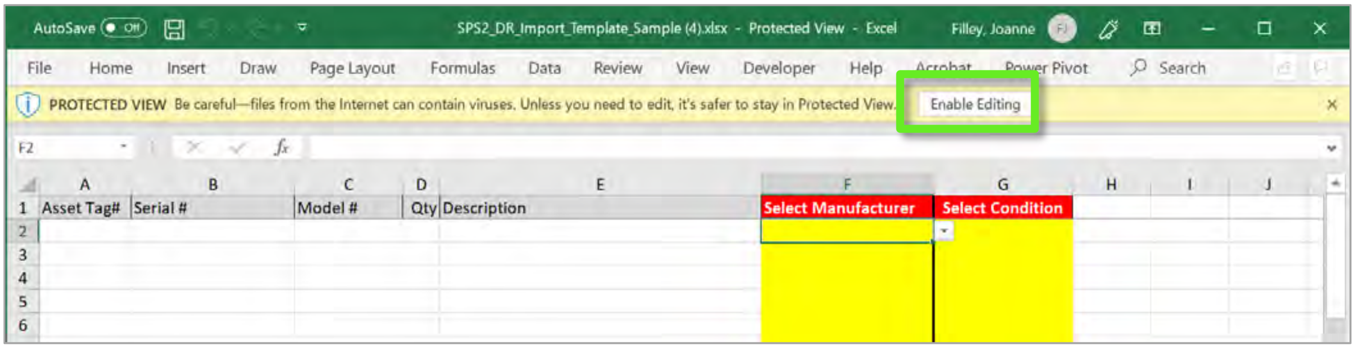
Create Excel list of items:

1. Click **Download Template**.



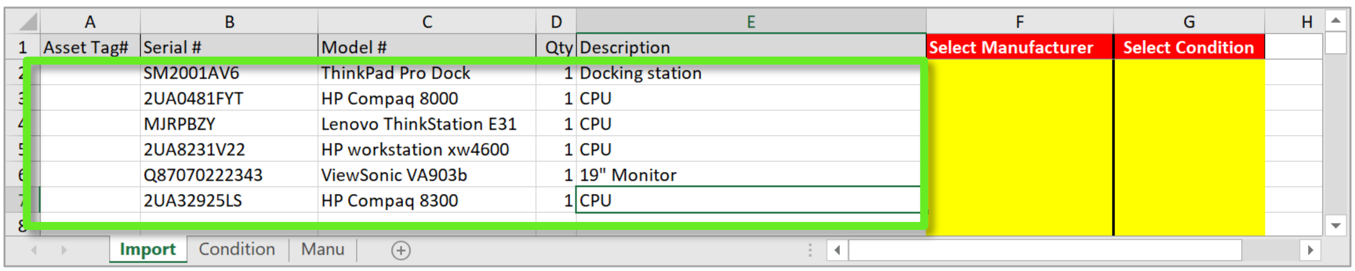
Result: The import template will open in Excel.

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.



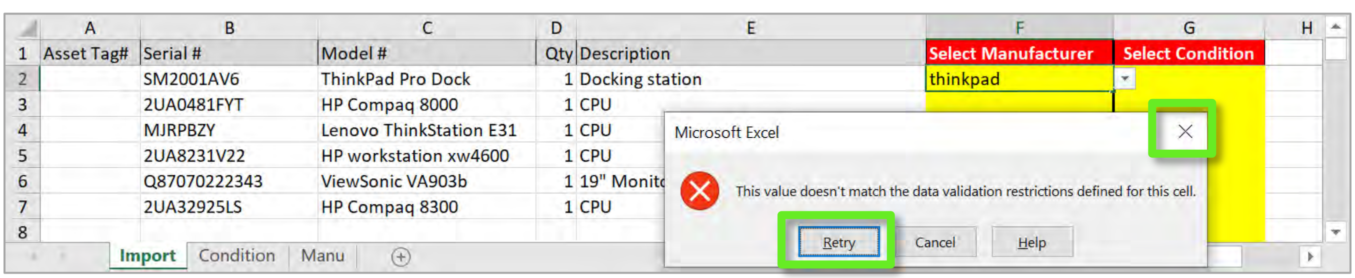
Columns F and G are required, and the information must exactly match the options in AiM.

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.

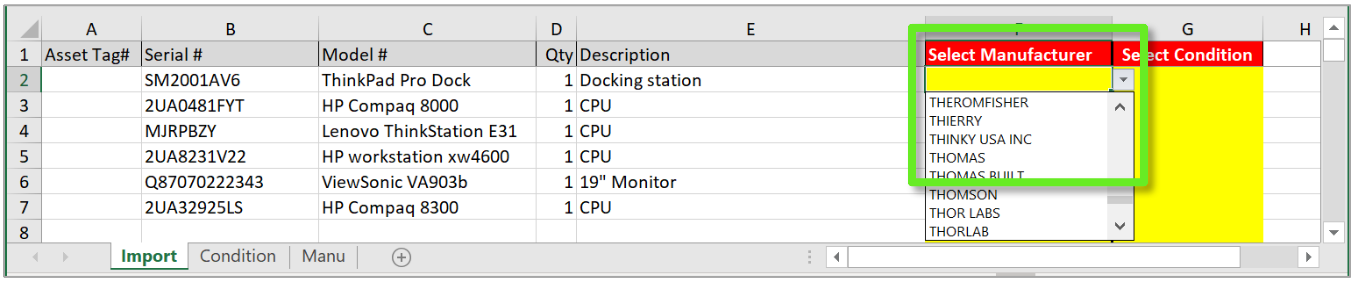
If you get an error:

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



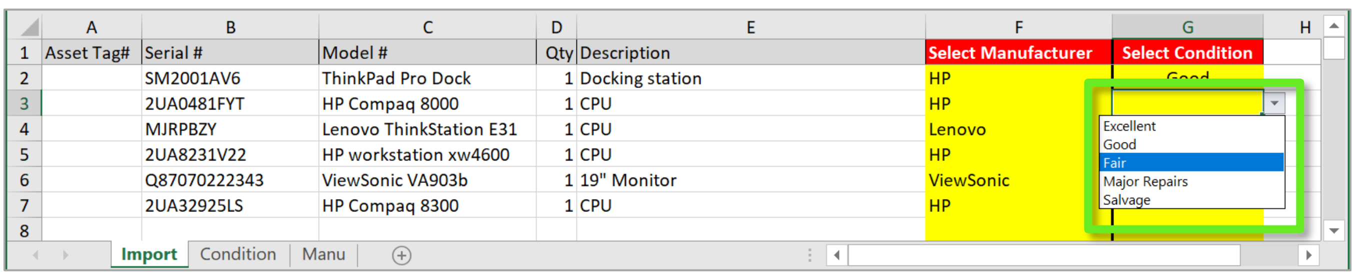
Add the manufacturer name from the list:

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.



Add the condition of each item:

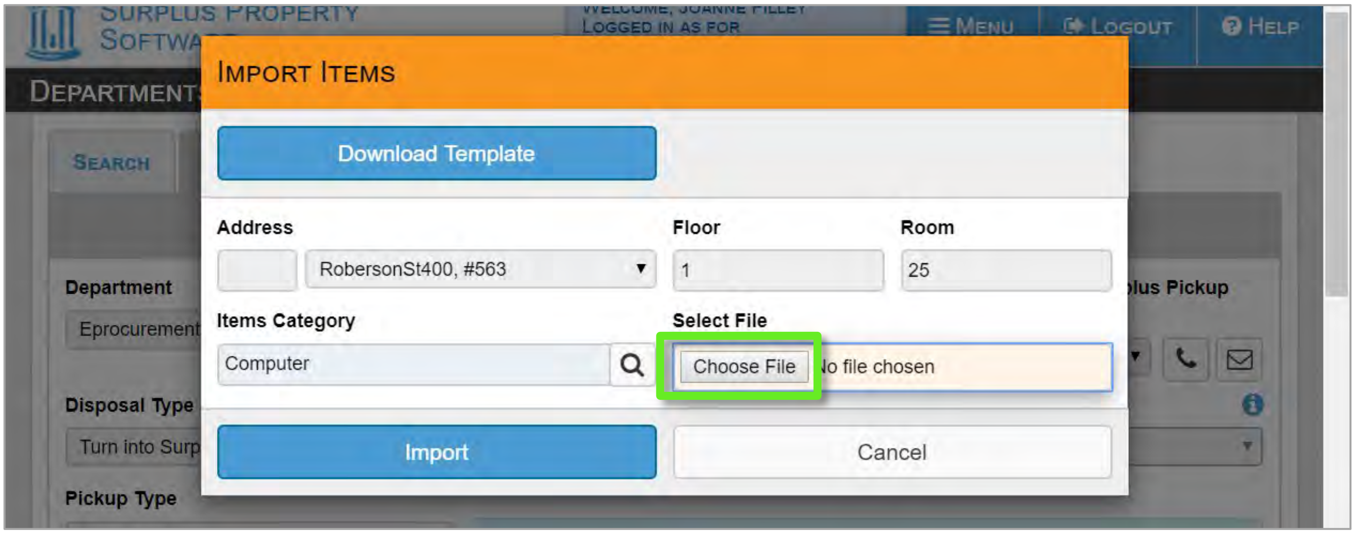
1. Open the list of condition options by clicking the cell in column G, then click the down-triangle that appears.
2. Select the appropriate condition from the list for each item.



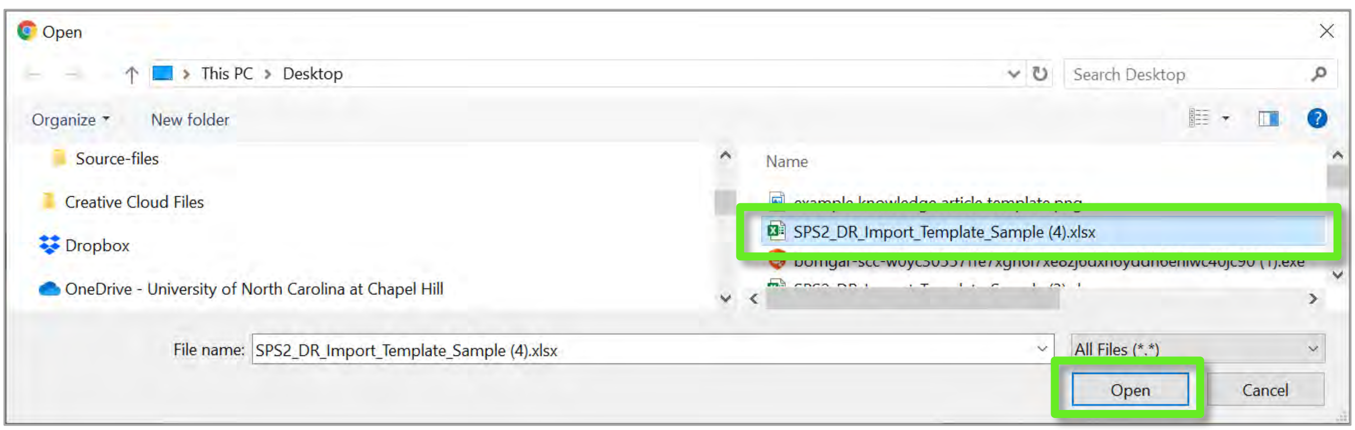
3. Save the file and return to the SPMS browser window.

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**.

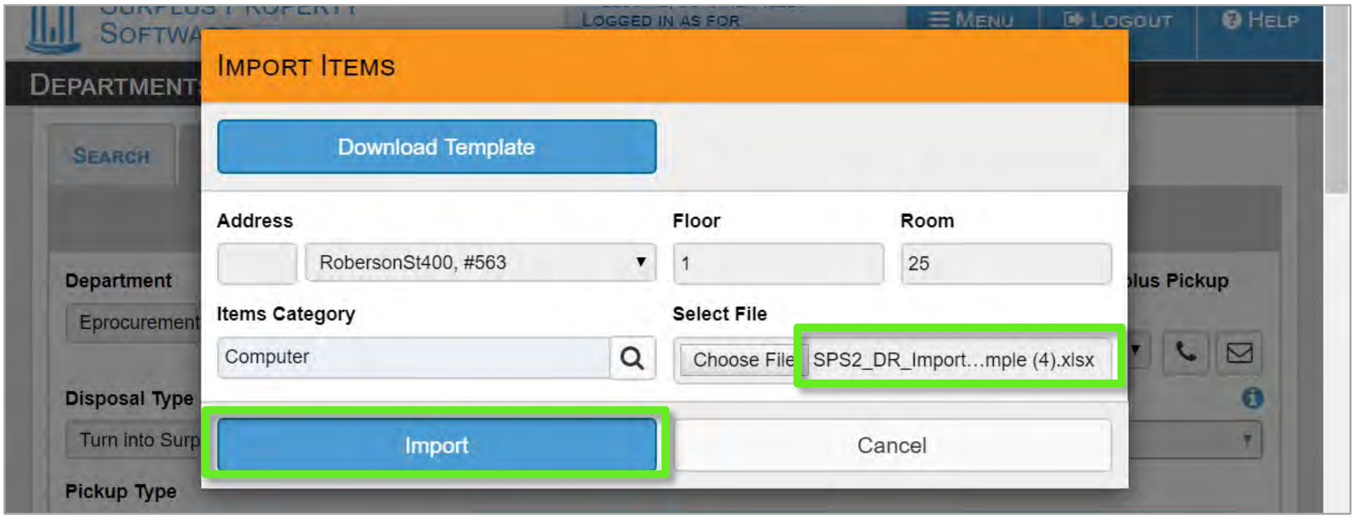


4. Browse to the location where you saved the Excel file.
5. Select the file and click Open.

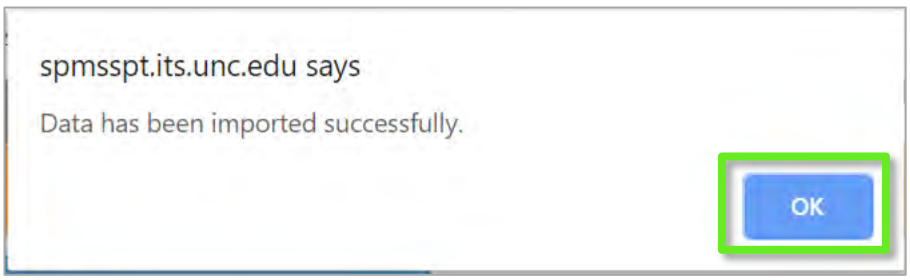


Result: the file name will appear on the Import Items screen.

6. Click **Import**.



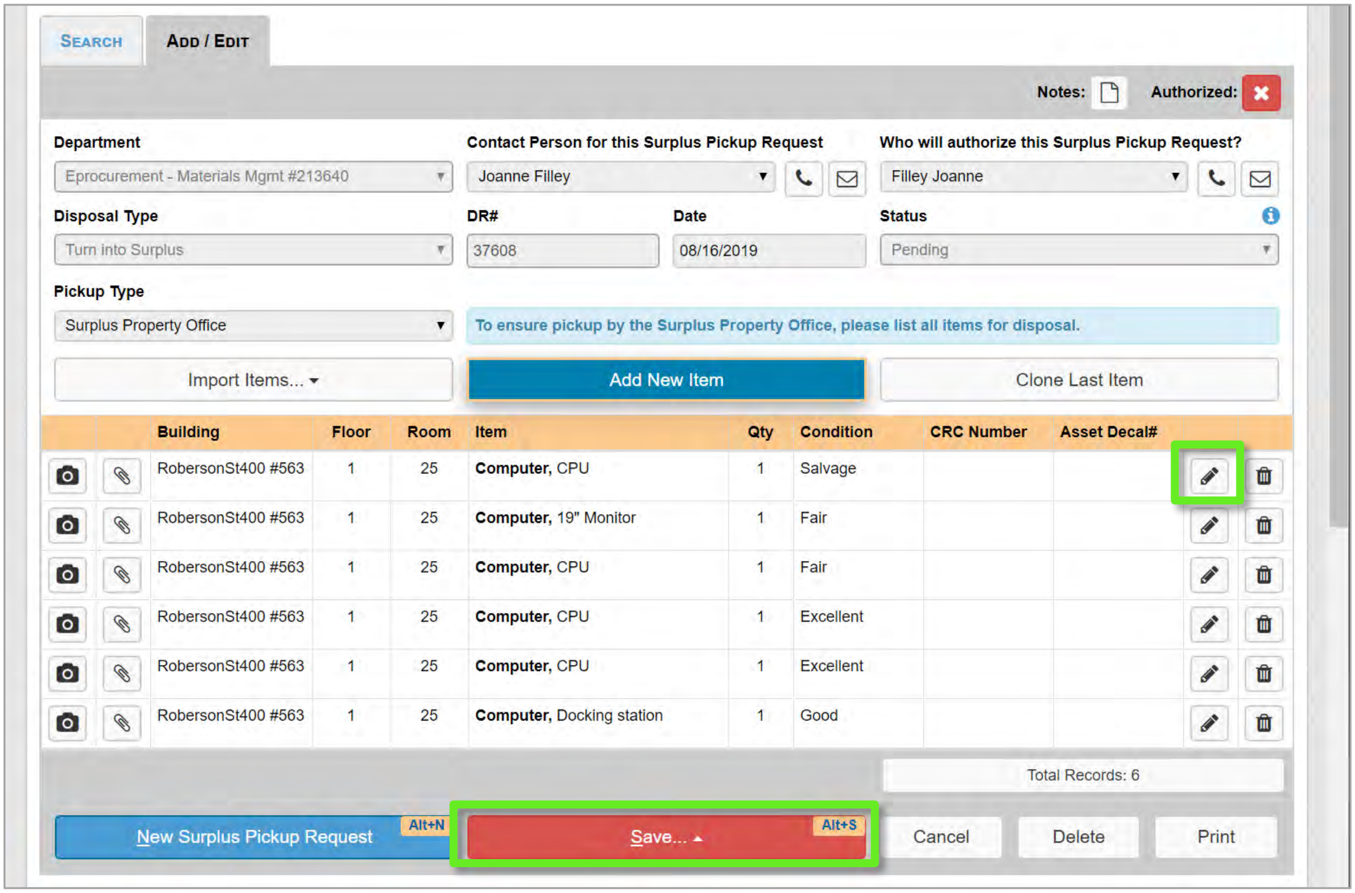
7. Click OK on the pop-up message.



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).

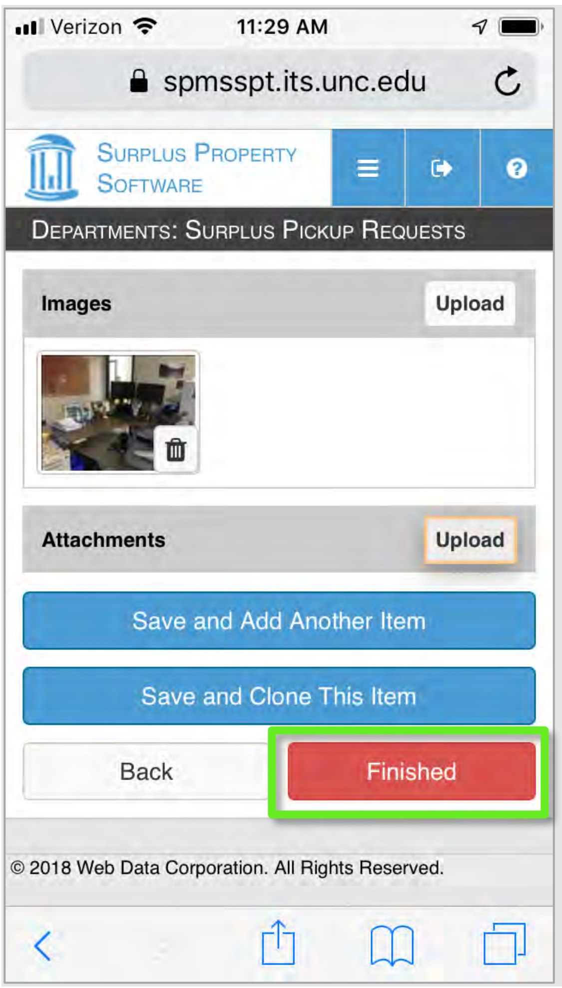
9. When your list is complete, save the request.

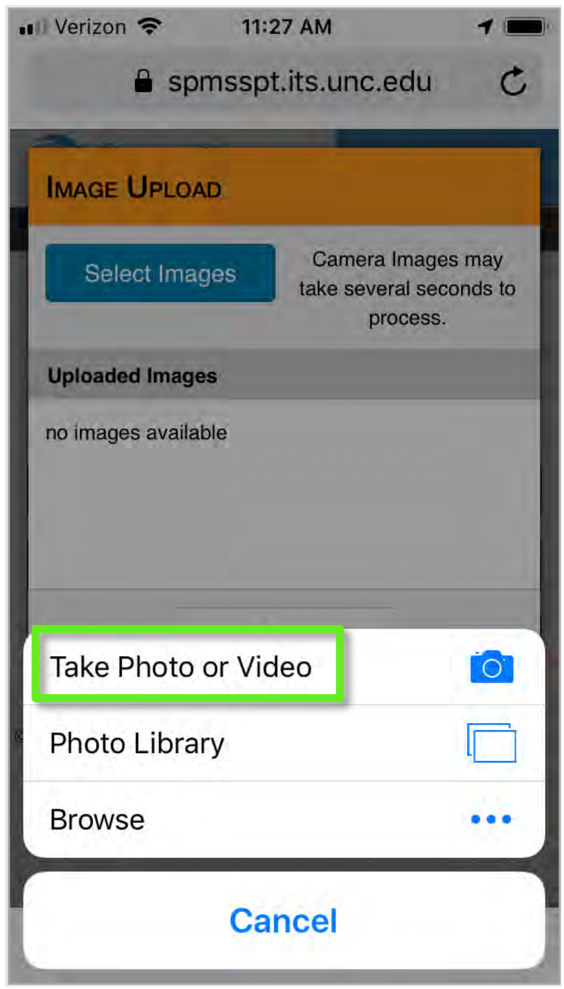


Adding Images to a Surplus Pickup Request Using a Mobile Device

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).

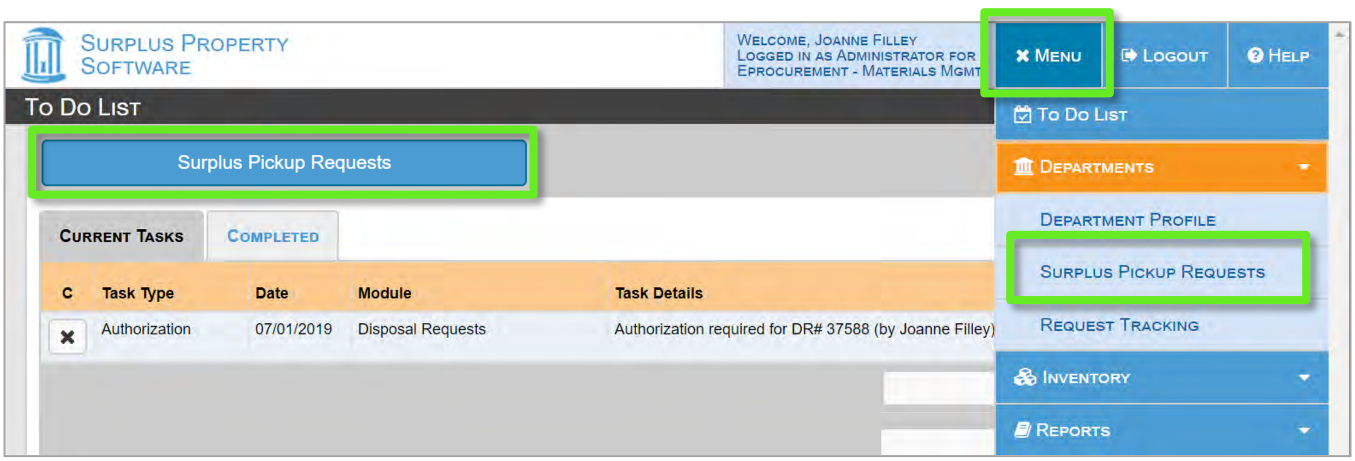
The **To Do** list on the home page will list all of the items that need your attention, but the items do not have active links to take you to the edit screen.

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.

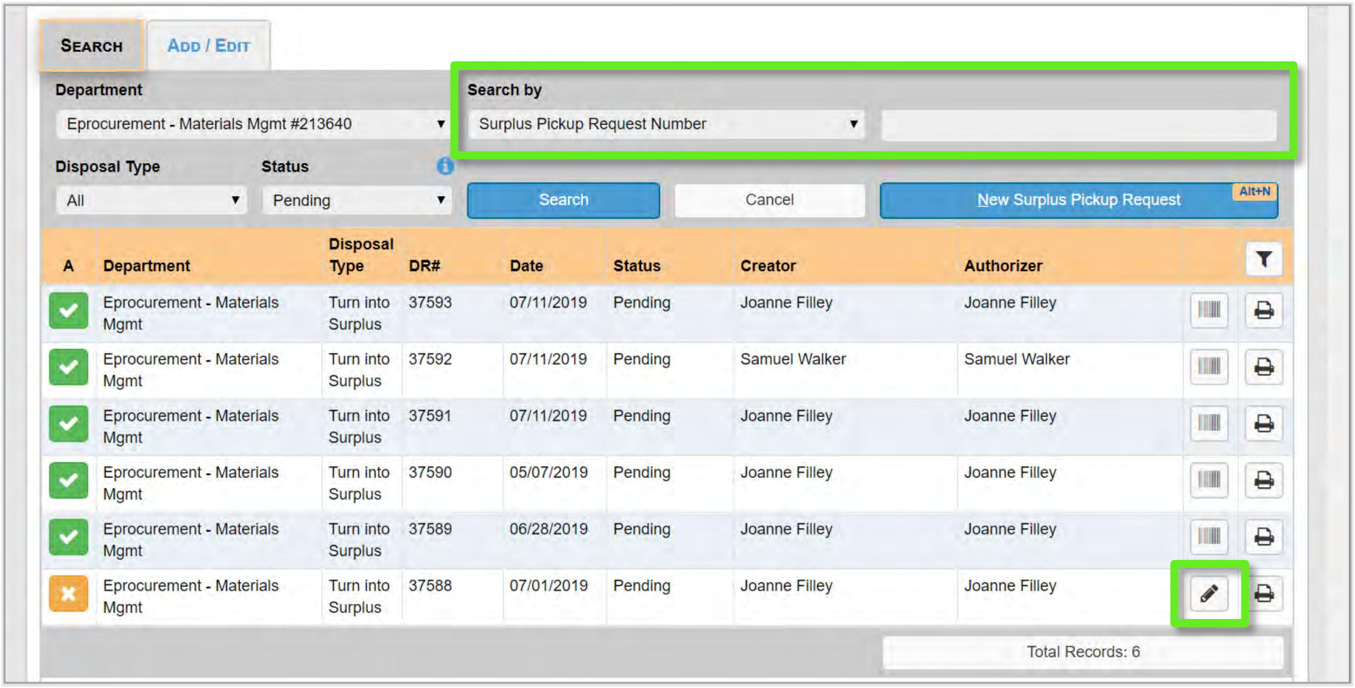


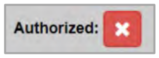
Result: The **Search** tab will display all of the department's active requests.

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.



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

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.

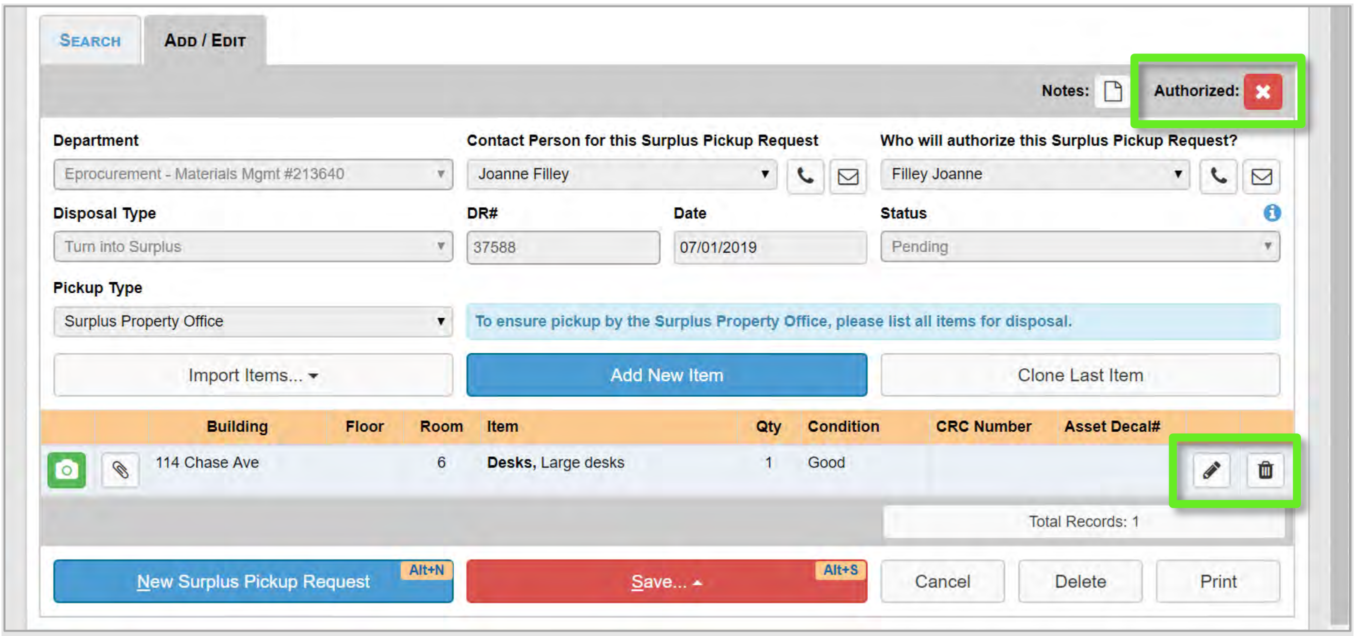
Authorized Indicators

✔ the request has been authorized.

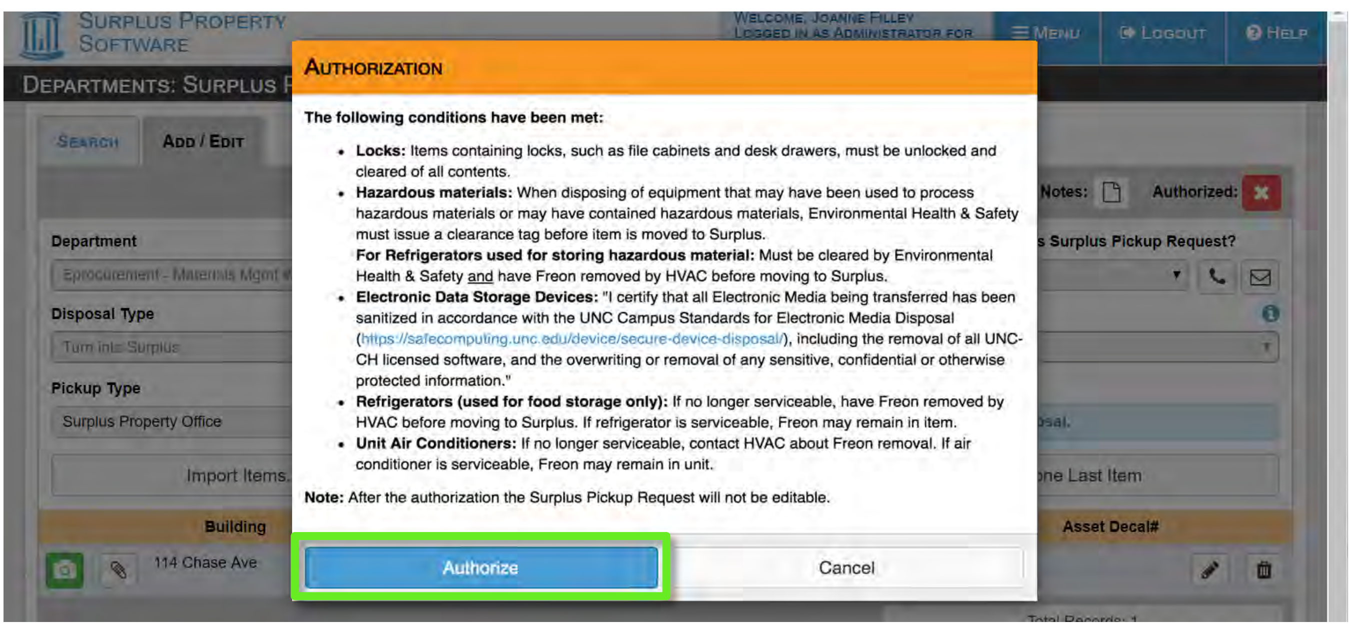
✖ the request has not been authorized.

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.

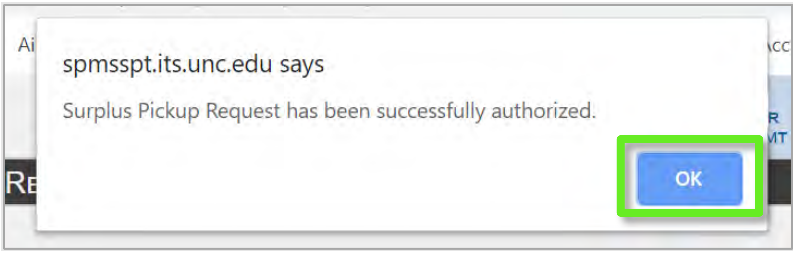
5. Click the red **x** to authorize the request.



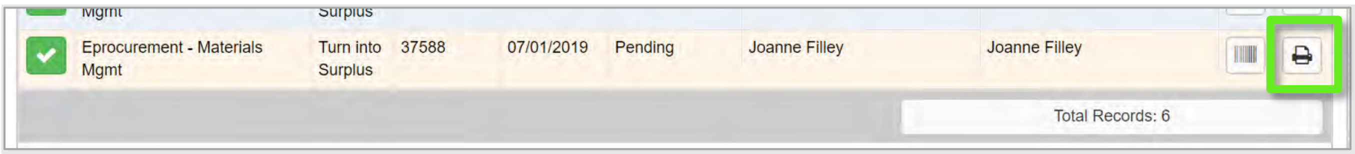
6. Review the Authorization message, then click **Authorize**.



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



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

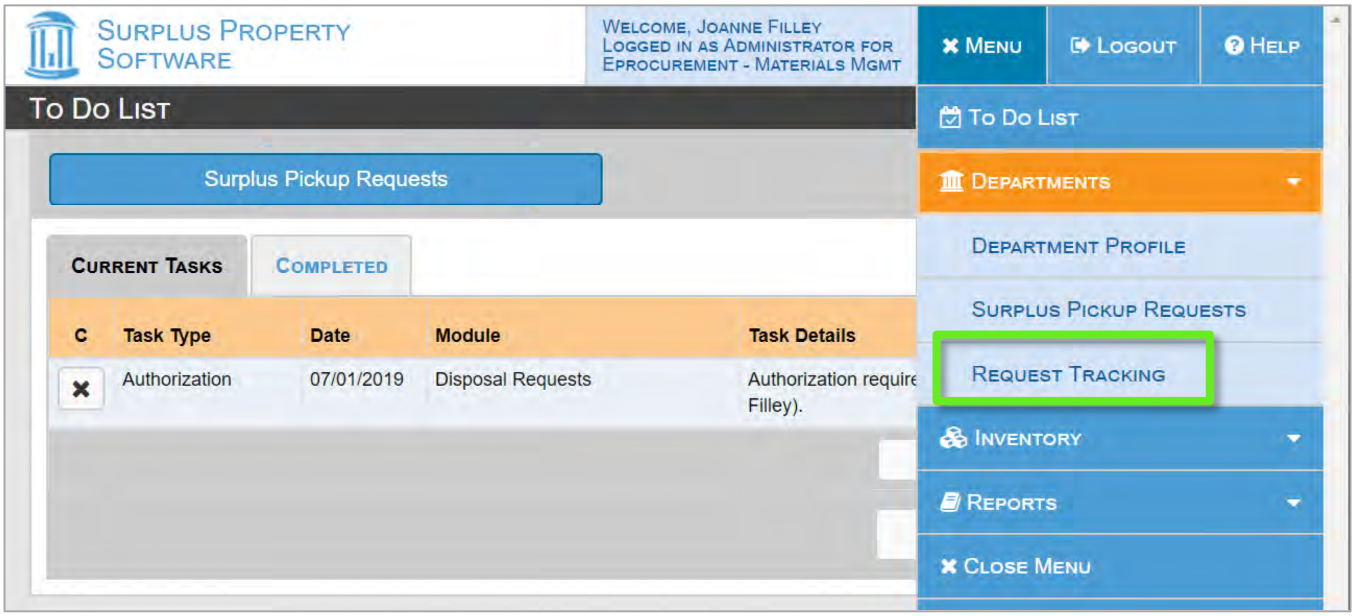


9. Sign and date the hardcopy request form and have it available with the items that are to be picked up, or if you are delivering the items to the surplus warehouse, be sure to take it with you.

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.

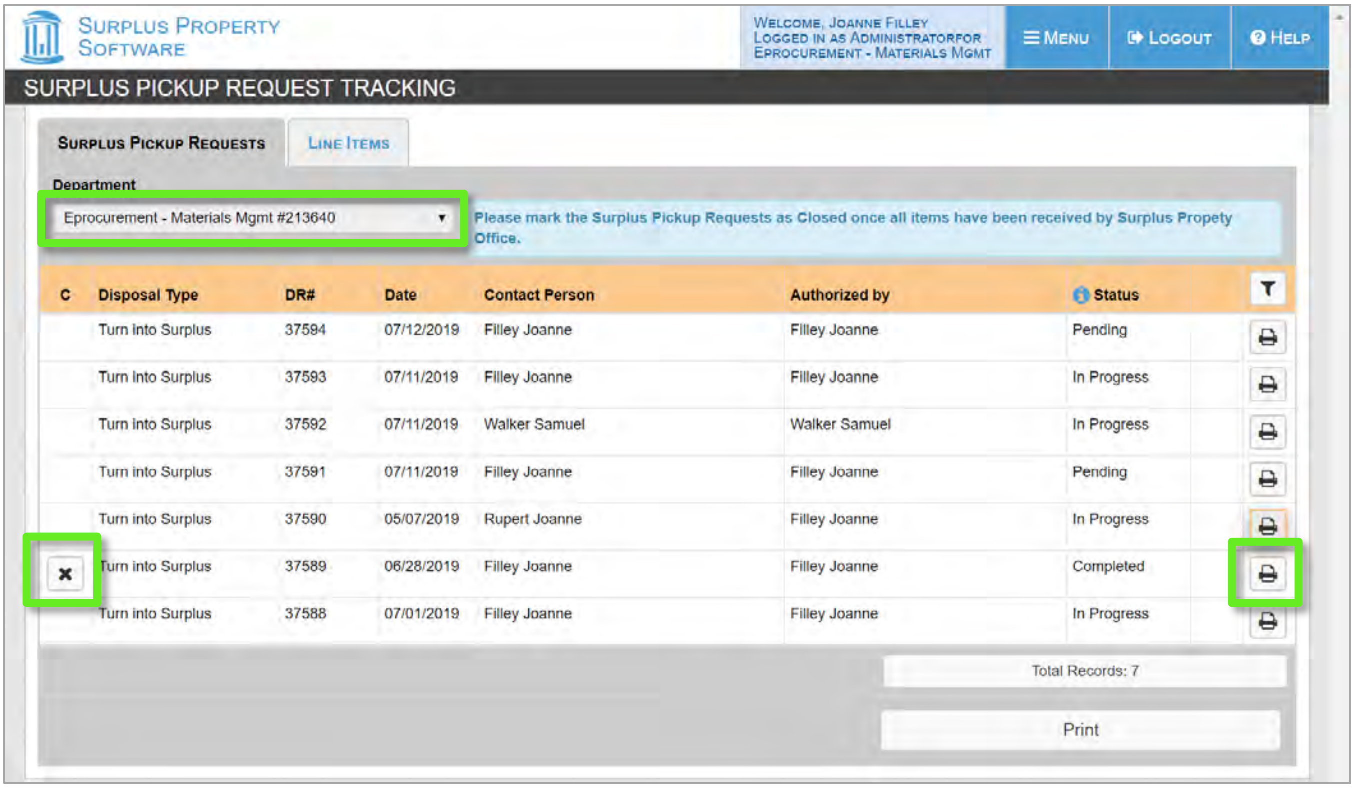


Result: The list of Surplus Pickup Requests displays on the screen. The status column indicates:

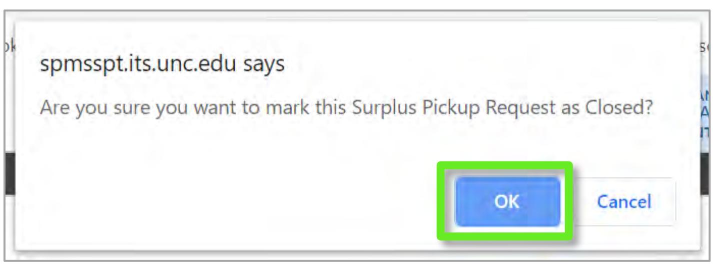
- **Pending:** Waiting for department approval or pickup scheduling by Surplus Property.
- **In Progress:** Scheduled for pickup, but not received into the Surplus Property Warehouse.
- **Completed:** Received by the Surplus Property Warehouse.
- **Closed**: Completed and closed by the department.

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

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



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



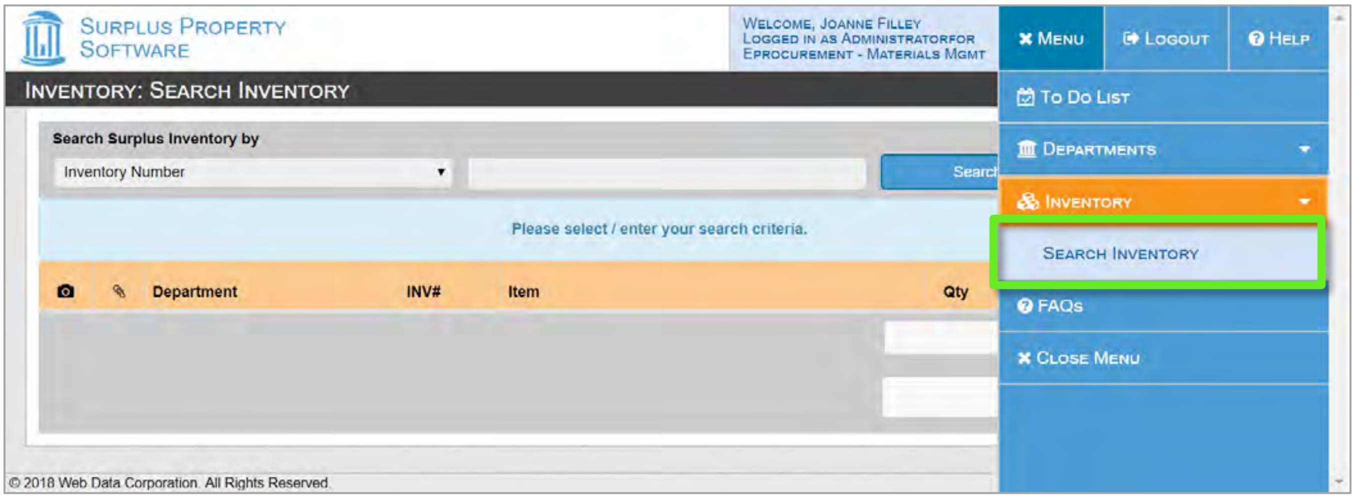
Result: The status will update to **Closed**.

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.

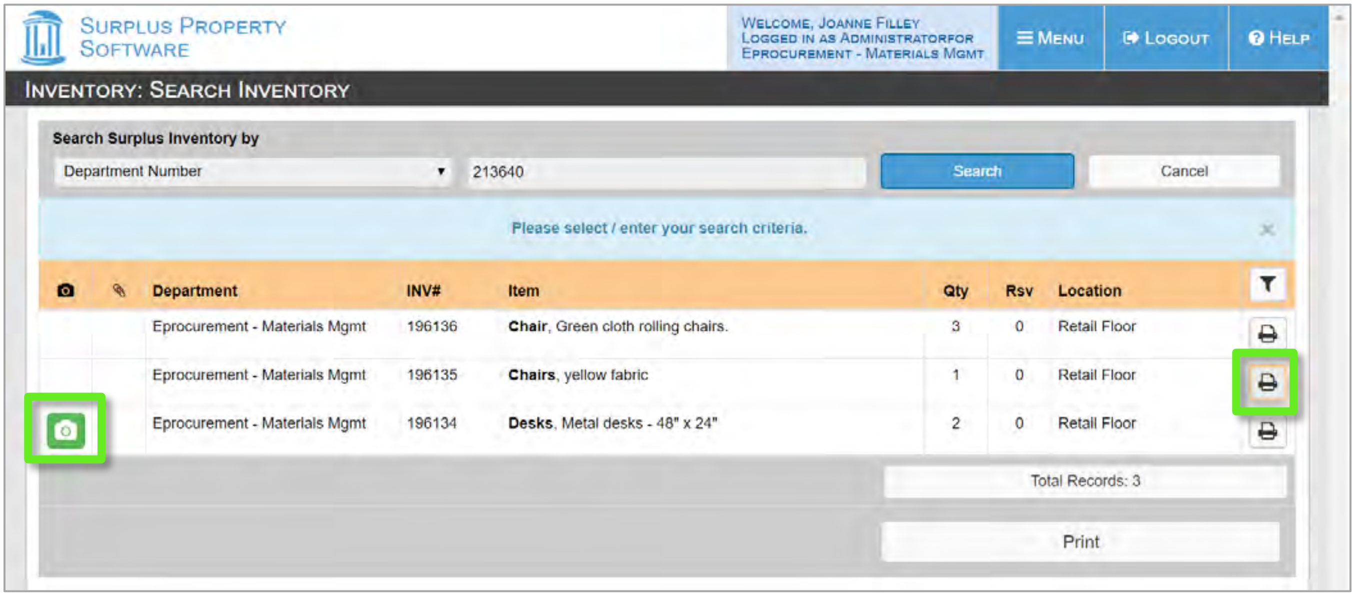
View Your Department's Surplus History

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



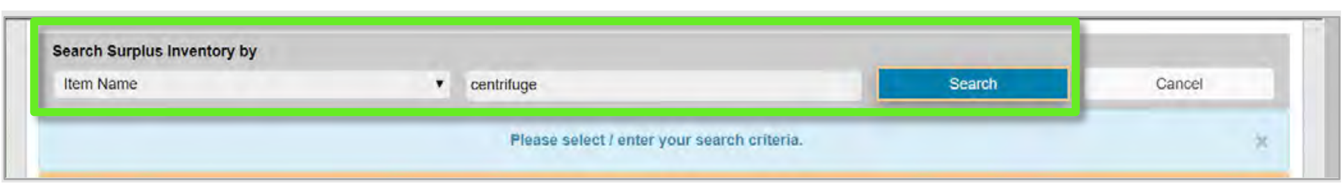
4. Select **Department Name** or **Department Number** from the **Search Surplus Inventory by** drop-down.
5. Enter your department name or number into the text box.
6. Click **Search**.

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.



Find Items to Buy from the Surplus Warehouse

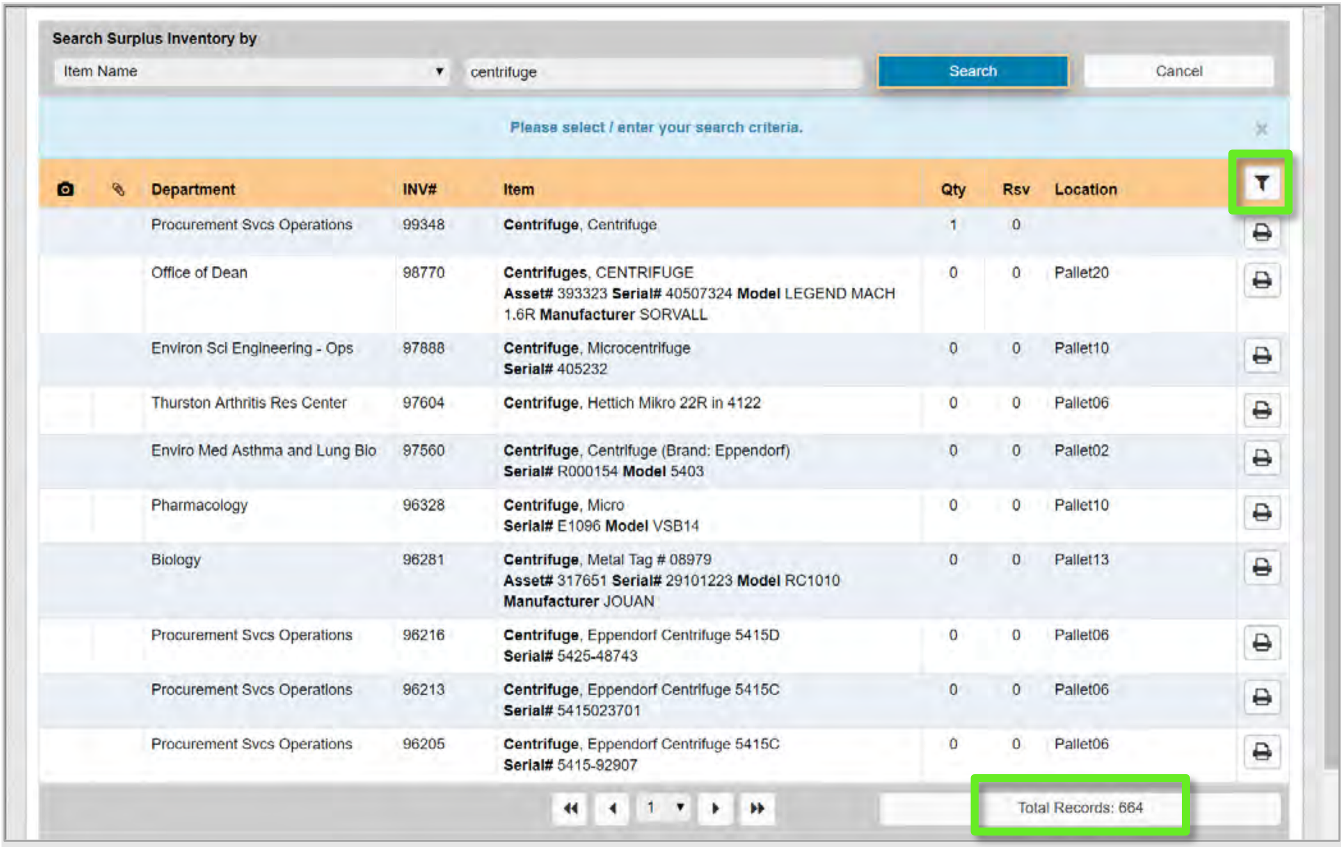
1. Click **Menu** at the top of the screen.
2. Click **Inventory** from the open menu.
3. Click Search Inventory from the inventory list.
4. Select **Item Name** from the **Search Surplus Inventory by** drop-down.
5. Enter a key word into the text box
6. Click **Search**.



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.

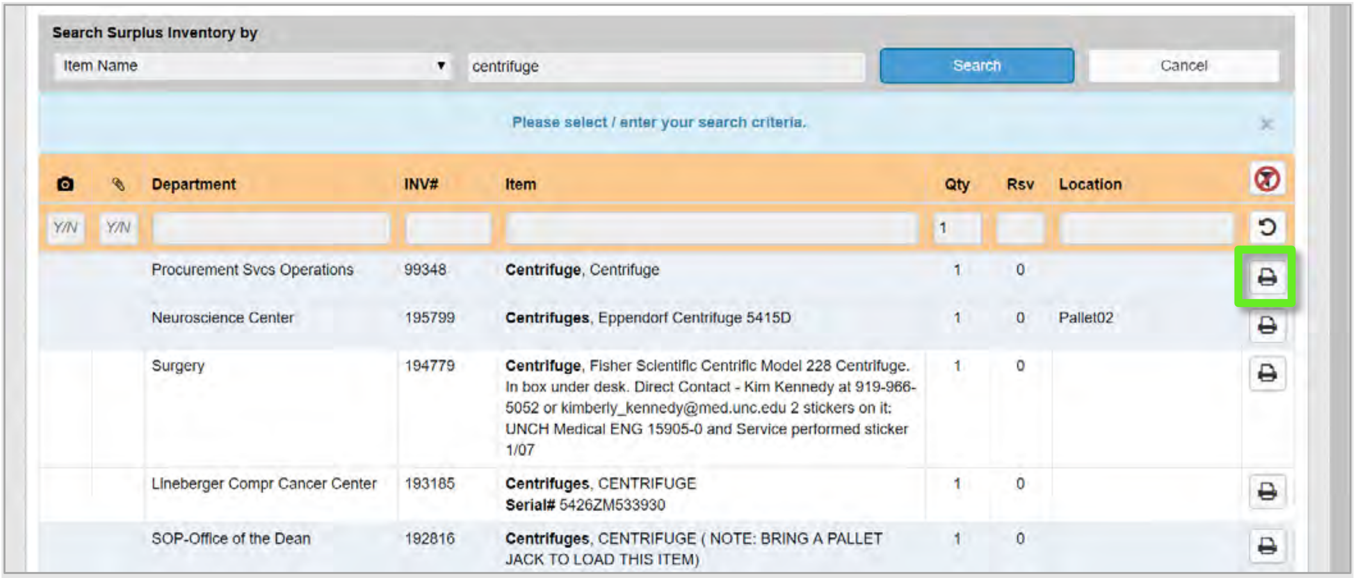


8. Enter a 1 into the **Qty** box.

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.



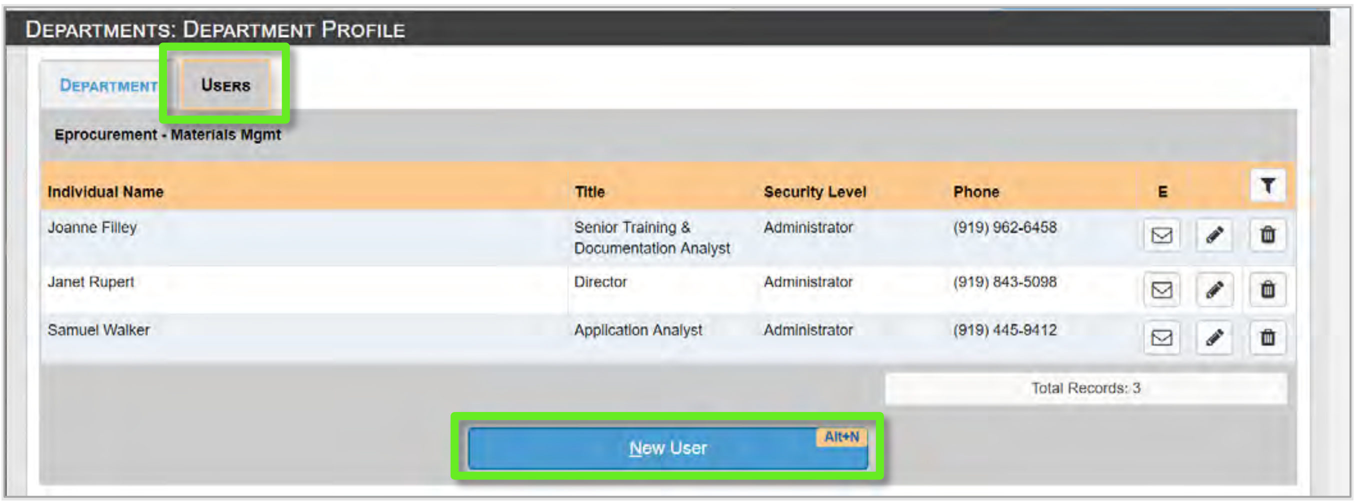
Important: If you find an item you want to buy, it is best to call the Surplus Warehouse to verify that the item is available before going to the warehouse.

Managing User Roles

Add a New User

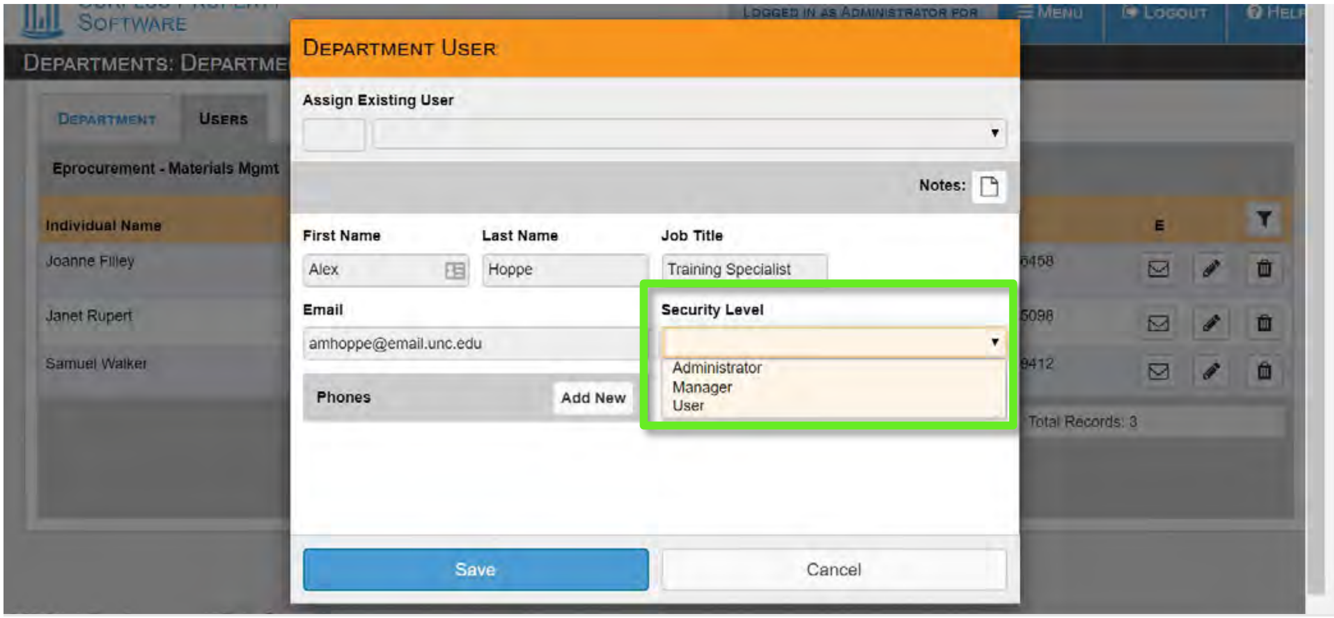
The easiest way to add departmental managers, users and additional administrators is to submit the forms listed on page 2 to your ARC. However, administrators do have access to add users, assign users to a department, and modify user's rights if needed.

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



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.

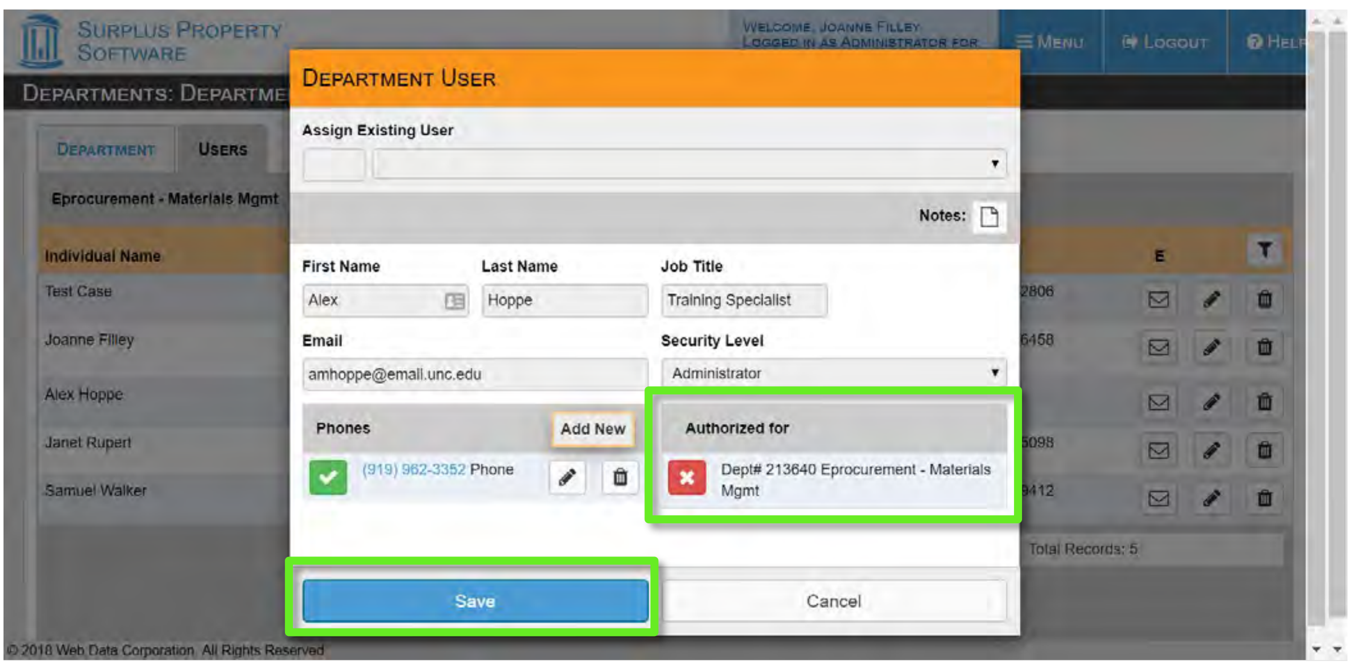
6. Add one or more telephone numbers.



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**.



If this user 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:

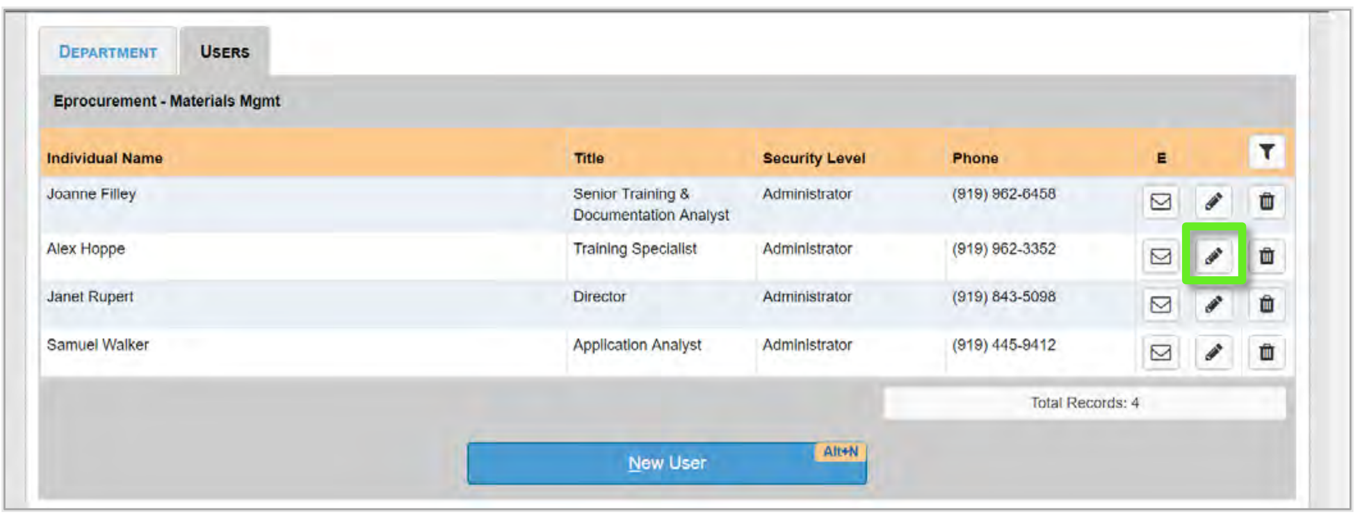
- Name and Email as found in the campus directory.
- Job Title.
- Phone Number.
- Name of additional department.
- Security level requested (administrator, manager, user).
- Authorization permission (Y or N).

Editing User Roles

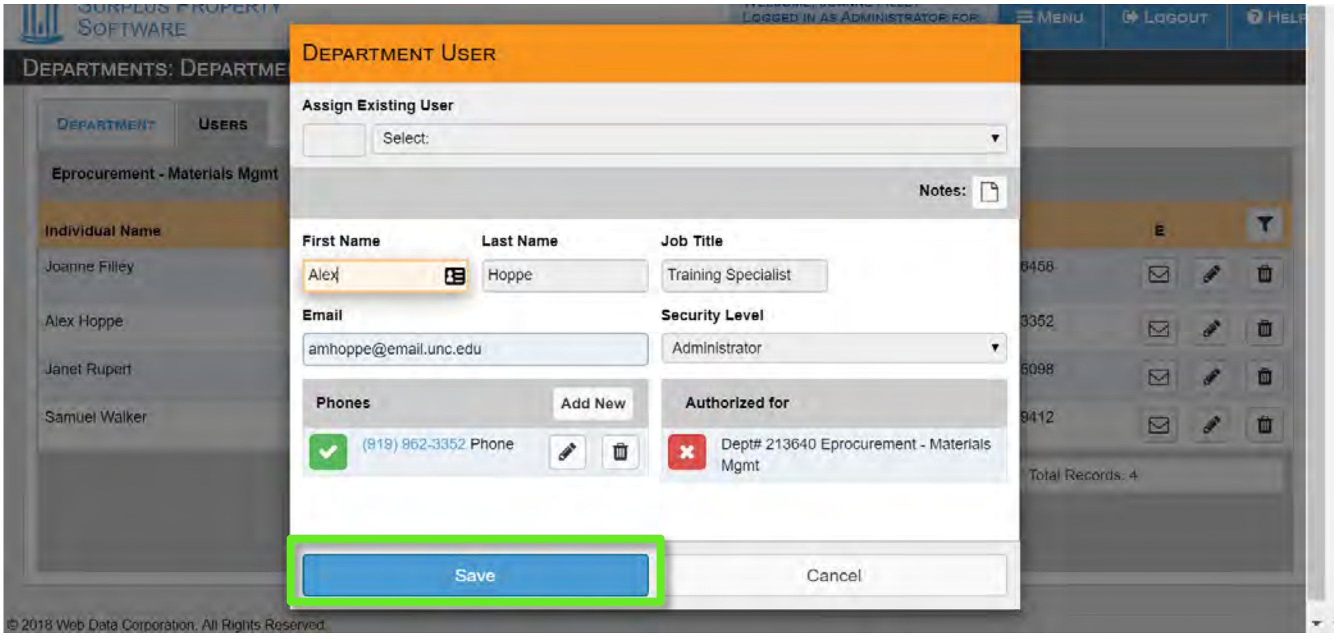
Administrators can edit other administrators, managers and users. Managers can edit other managers and users. Users can edit only themselves.

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.



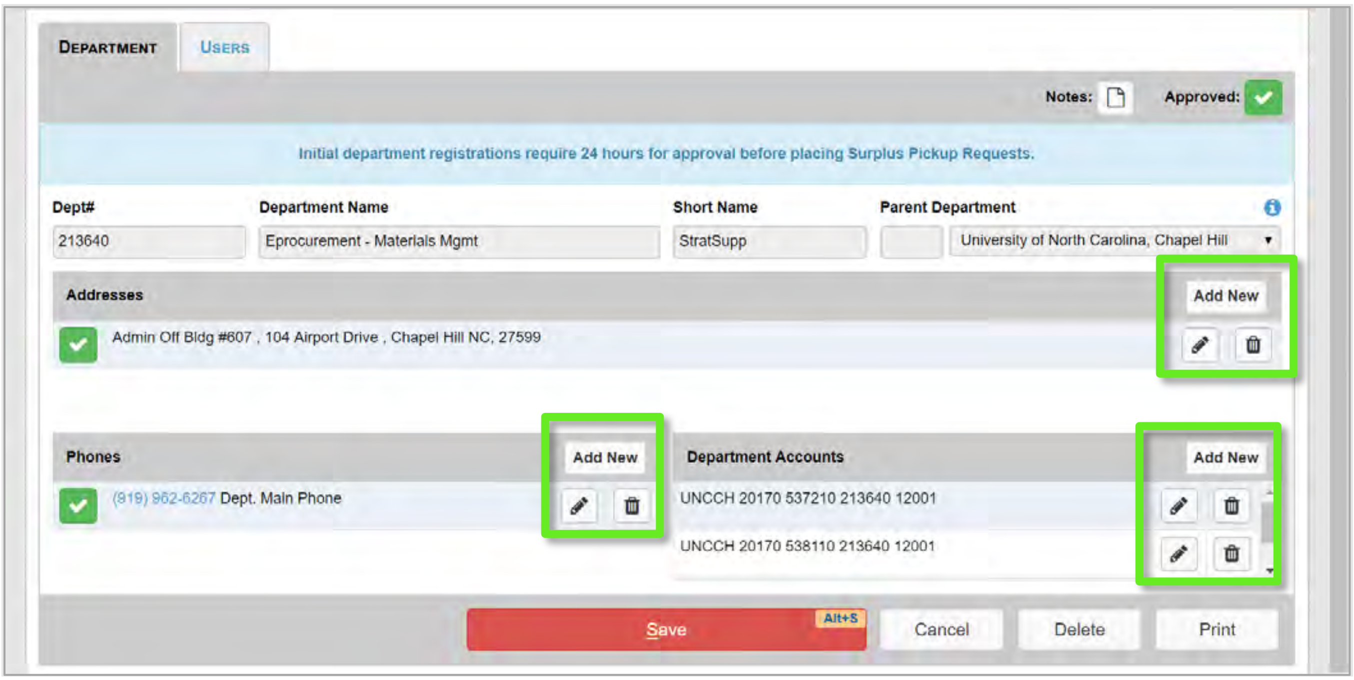
3. Revise the Department User settings as needed.
4. Click **Save**.



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**.



Get Help

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