

# Surplus

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

In summary, the items for surplus are identified; approved by management and the Surplus Warehouse manager; picked-up and moved to the Surplus Warehouse; and auctioned to the public.

## How to Create a Surplus Pickup Batch

**SPB (Surplus Pickup Batch)** provides the facility for creating and viewing a surplus pickup batch. The key field is Action (Add).

Security by value restrictions are applied such that the operator must be authorized for the Asset BU.

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

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

## How to Add Items to a Surplus Pickup Batch

**SA (Surplus Asset)** provides the facility for adding items to a surplus pickup batch. The key fields are Action (Add) and Control No (for tagged assets: red or blue, prefix the tag number with a T).

Security by value restrictions are applied such that the asset must be in the same Asset BU as the BU on the Surplus Pickup Batch.

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

### Adding surplus items not in AIMS:

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

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

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

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

### **Adding items or assets already in AIMS:**

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

- **Located in Room Tag No** enter the room tag number where the asset will be located when picked up by Surplus Warehouse or leave the existing room if appropriate. Press **PF1 (Help)** for a list of rooms for a specified building. Most rooms have a barcode with this Room Tag Number affixed to the doorway.
- **Condition** enter the condition of the asset. Press **PF1 (Help)** for possible condition codes.

- **Pre surplus action** enter the pre-surplus action. Press **PF1 (Help)** for possible pre-surplus actions. This is where you designated what type of action was taken based upon the type of asset. For computer and laptop, indicate whether you DOD wiped the hard drive, kept the hard drive, or want Surplus to remove the hard drive. For desks, file cabinet, storage cabinet, bookcase, or credenza, you must certify that the item is unlocked and empty. For PDAs or cell phones, you must certify that the memory has been cleared. If no action is necessary, indicate with an **N**.
- **Certified by** enter the person who performed the pre-surplus action. Required for certain types of pre-surplus actions codes.
- **Notes** optional notes field.

Press **PF10 (Save)** to add the surplus asset to the pickup batch.

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

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

## How to Remove Items from a Surplus Pickup Batch

**SA (Surplus Asset)** provides the facility for removing assets or items from a surplus pickup batch. The key fields are Action (**Withdraw**) and Control No (for the item or tag number – prefixed with a T). **Note:** once an asset has been removed from a pickup batch, it cannot be added back to the same pickup batch. You'll need to create another surplus pickup batch for which to add it.

Press **PF10 (Save)** to remove (or withdraw) the surplus asset from the pickup batch.

## How to Update Items in a Surplus Pickup Batch

**SA (Surplus Asset)** provides the facility for updating assets or items in a surplus pickup batch. The key fields are Action (**Update**) and Control No (for the item or tag number – prefixed with a T).

Make any necessary changes. Press **PF6 (SDesc)** to change the surplus description.

Press **PF10 (Save)** to save your changes.

## How to View Items in a Surplus Pickup Batch

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

## How to View Surplus Pickup Batches for an Employee

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

## How to Submit a Surplus Pickup Batch for Approval

**SPBA (Surplus Pickup Batch Approval)** provides the facility for submitting a surplus pickup batch for approval by management and surplus warehouse manager. The key fields are Action (**Submit**) and Surplus Batch number.

Press **PF10 (Save)** to submit the surplus pickup batch for approval.

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

Reports and labels are sent to the surplus employee within the department. The surplus employee is responsible for affixing the labels to the correct items.

In coordination with the surplus employee, items are picked up by surplus warehouse personnel or facilities management personnel who use surplus warehouse report in conjunction with the labels to check off items picked up. The surplus employee signs a copy of the report verifying what was picked up. Some items may not be picked up for various reasons. Items are transported back to the surplus warehouse.

When the items are brought back to the warehouse, a copy of the report used to check off items picked up and to verify what was delivered. A decision is made whether the item is worth auctioning (if not, it is disposed of immediately) or the item is part of an entire pallet of equipment. Otherwise, the receipt of the item is recorded.

Once an asset has been received by the Surplus Warehouse manager, the *Surplus-Asset-Status* is set to **R** (Received) for all received items and the *Asset-BU* for tagged assets is changed to SWRH (Surplus Warehouse)

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

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

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

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

## After the Auction is complete

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