Material And Logistical Services Surplus System User Guide

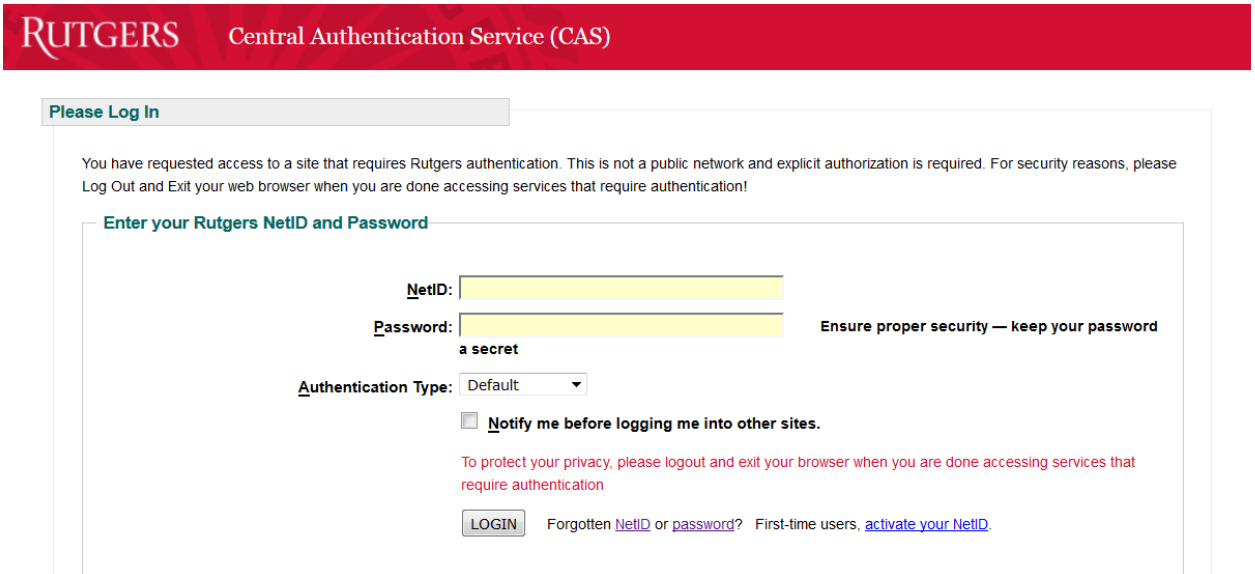
User Guide to Asset Management "Surplus Service Request" System

AssetWORKS

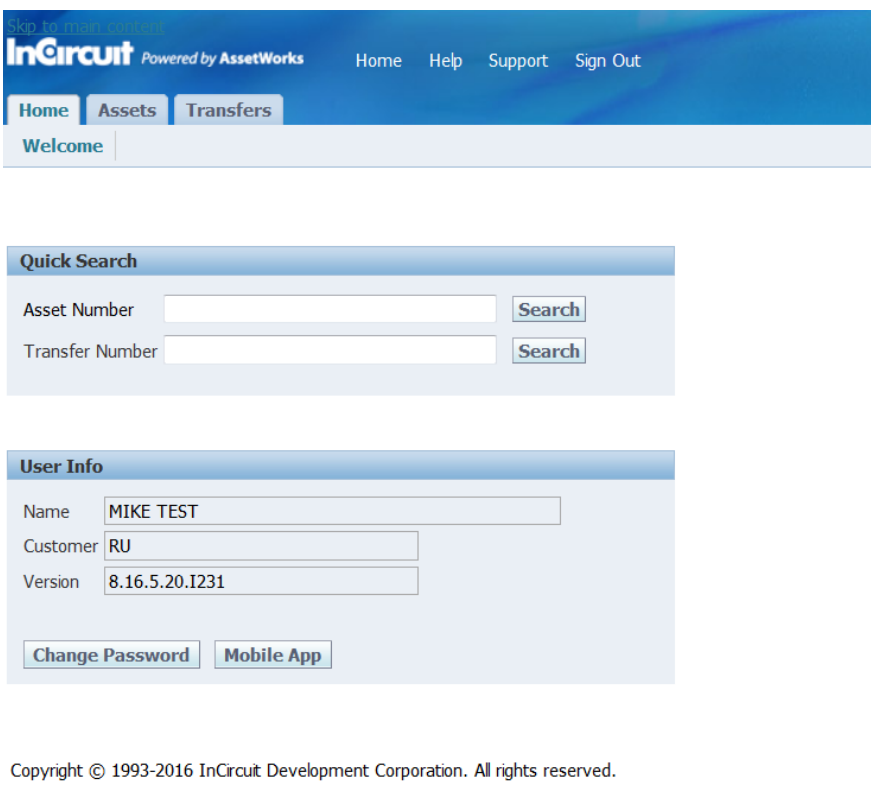
Contents

Logging into the system

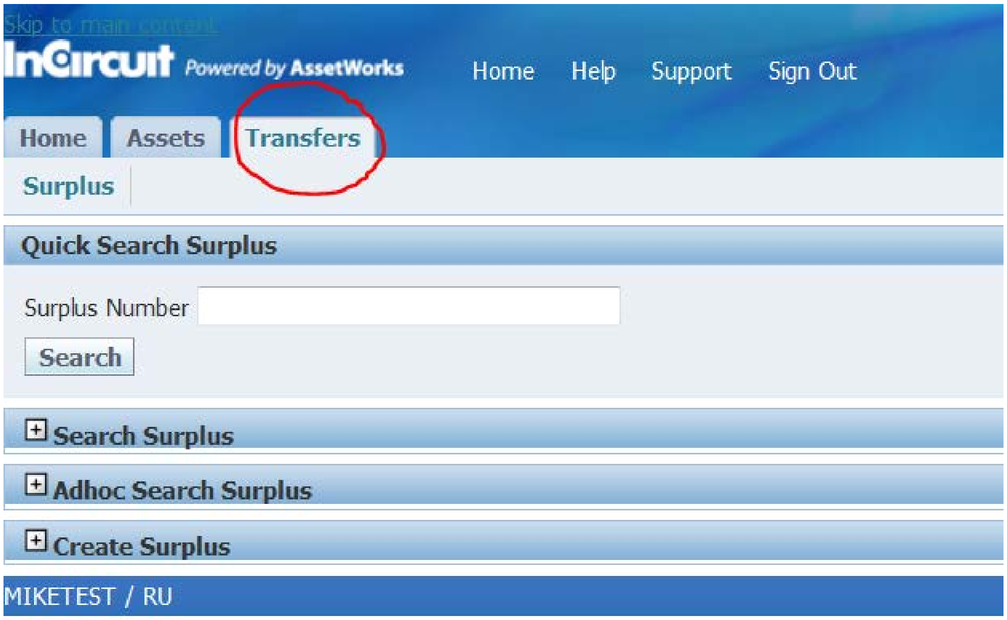
Login via this link: [Rutgers University Surplus Login]



Upon successful login Users are taken to the Welcome Screen.



Click on the "Transfers" tab near the top left hand side of the screen

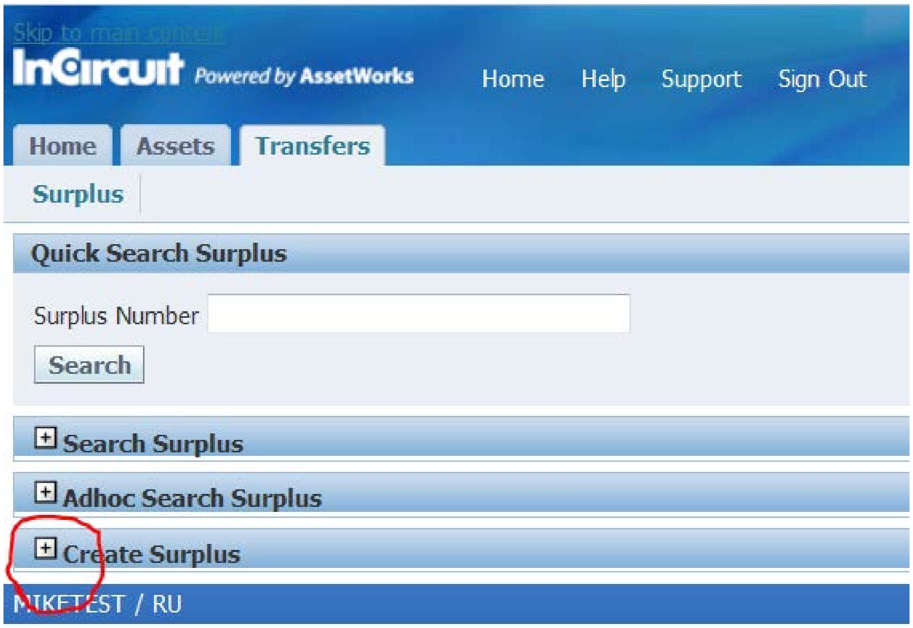


Surplus Transfers (Transfers Tab)

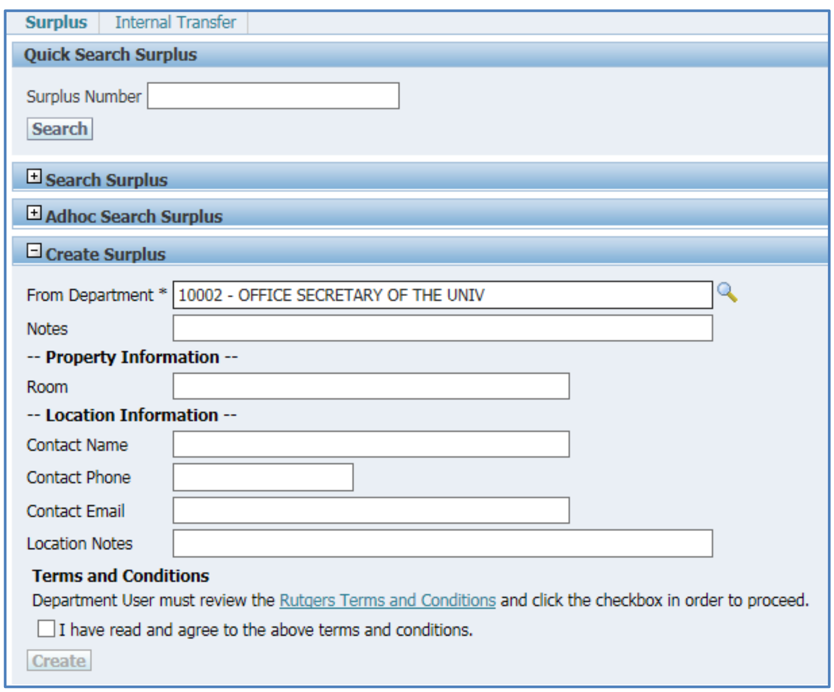
This screen allows you to search for surplus transfers or initiate new surplus transfers of assets.

Creating a Surplus

To initiate a new surplus transfer of one or more assets, click the "plus" icon in the Create Surplus region.



Enter the header information relevant to the transfer; click the “Create Surplus” button. This will create the transfer header and will take you to a new screen where you specify the assets you are placing onto the transfer.



Enter at a minimum the required fields in the Create Surplus region:

Required fields have an * next to them.

From Department: The User enters the "From Department". **Note:** this will default to the Department you have been assigned if you are setup with access/scope for only one Department. If you have multiple, you will have to use the lookup option by typing in the name or clicking on the magnifying glass.

Notes: Enter any notes into this field.

Room: Enter the Room where the property is located.

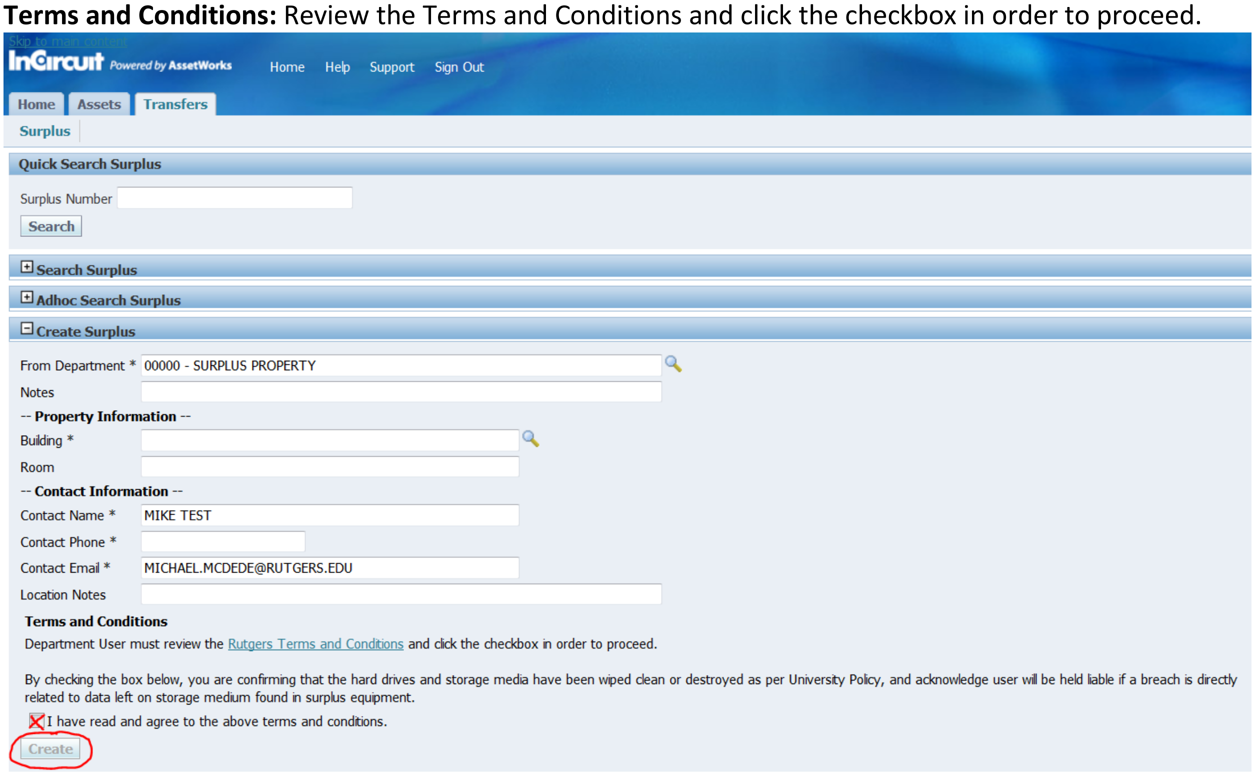
Contact Name: Enter the Contact Name of the person who is the best person to contact regarding this surplus.

Contact Phone: Enter the Contact persons Phone Number for this surplus.

Contact Email: Enter the Contact persons email address for this surplus.

Location Notes: Add any additional Location notes.

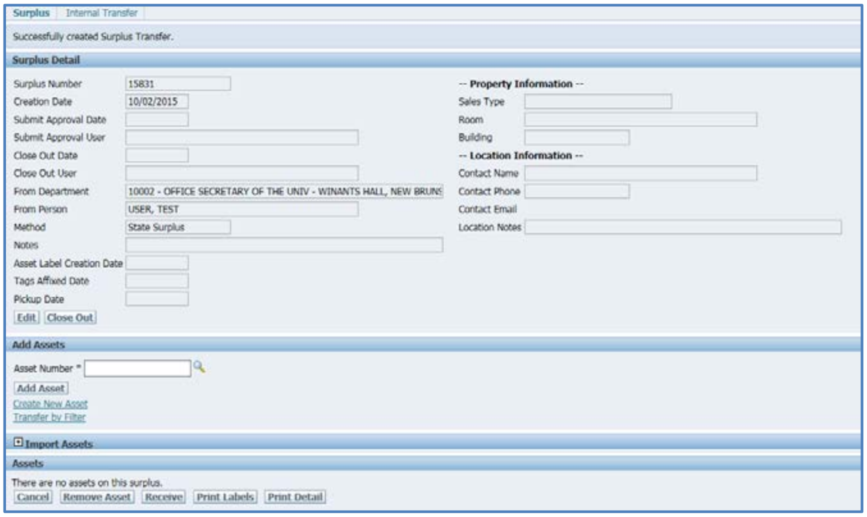
Terms and Conditions: Review the Terms and Conditions and click the checkbox in order to proceed.



Once all data has been entered, click the **Create** button.

Surplus Header/Surplus Detail

Once a Surplus is created, you will be taken to the Surplus Detail screen. At the top is the Surplus Header/Detail It shows the data that was just entered to create the Surplus as well as the Surplus number (every time a Surplus is created, it's given a unique number for tracking) and the creation Date of the Surplus. This area is called the "Surplus Transfer Header".

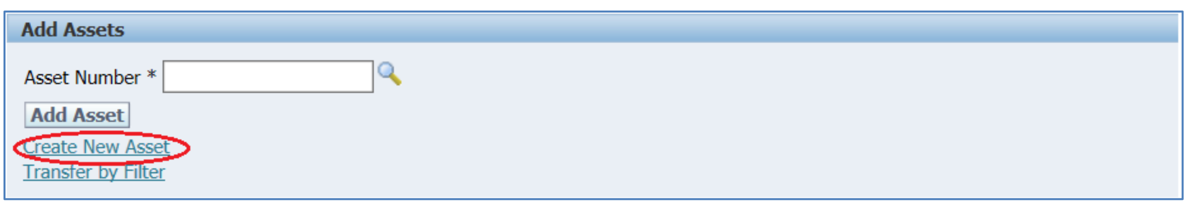


If the Surplus Transfer Header/Detail needs to be updated, you can use the Edit button to make those changes.

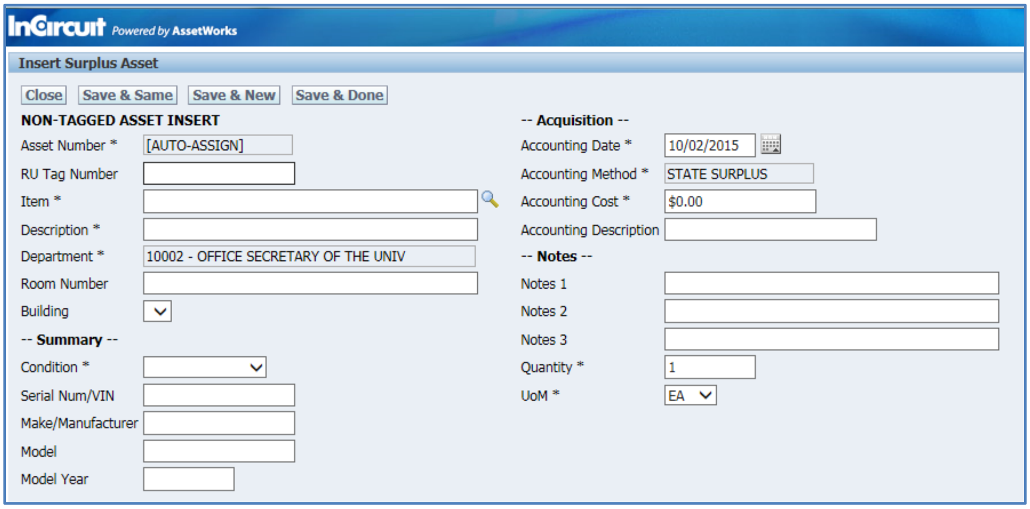
Adding Asset/Property to a Surplus

Users can now start to add their assets to the surplus:

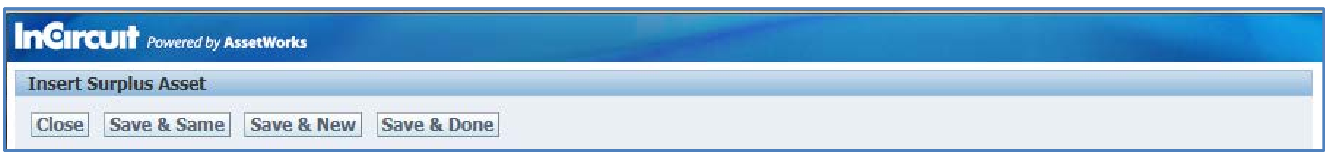
1. Assets need to be created and added to the Surplus, click on the "Create New Asset" button from the Surplus Detail.



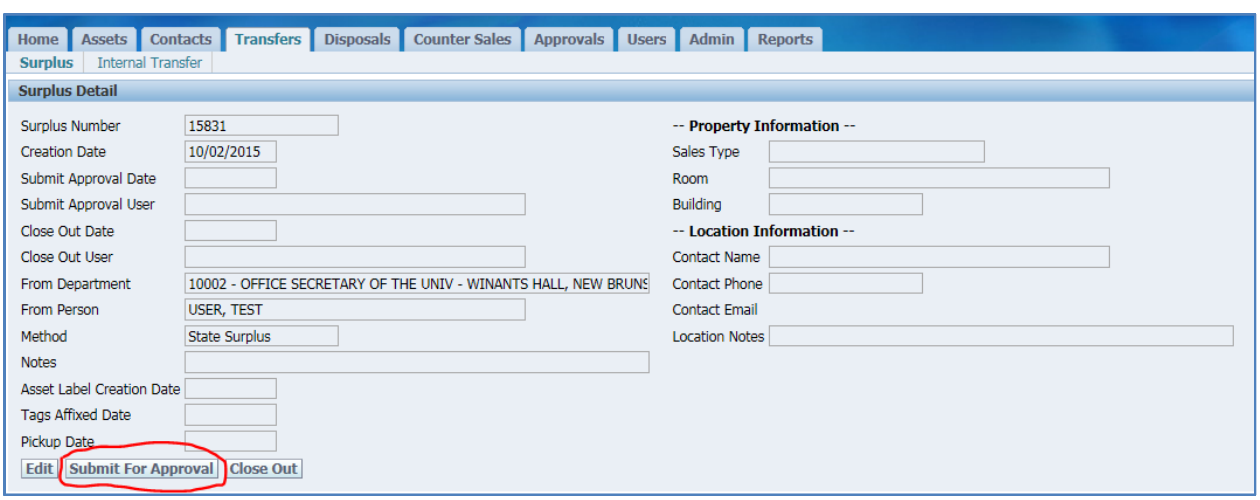
This will bring up a new window where an asset can be created**. Any field with an * next to it is a required field.**



Once all require data has been entered, users can choose “Save & Same” to duplicate the entire non-tagged asset. “Save & New brings” up new non-tagged asset page and “Save & Done” returns the users to the Surplus Detail.



Once you have hit Save & Done, you will be returned to the “Transfer Detail screen” and can review the items that were added and Submit for Approval.



FOR APPROVERS ONLY

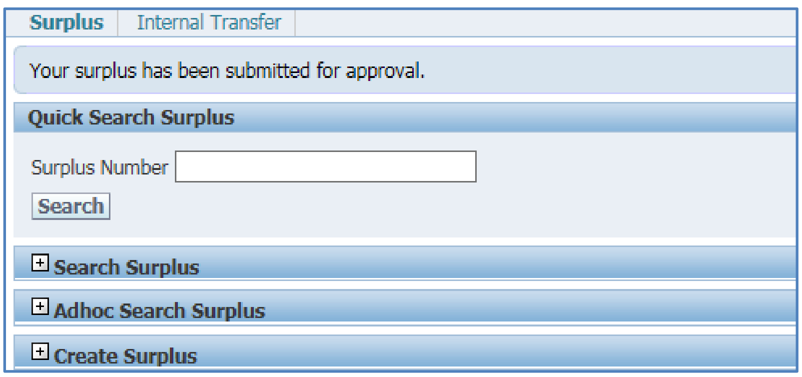
Approving Surpluses

In order to approve a Surplused item you must have permissions granted by a department head or designated/authorized staff).

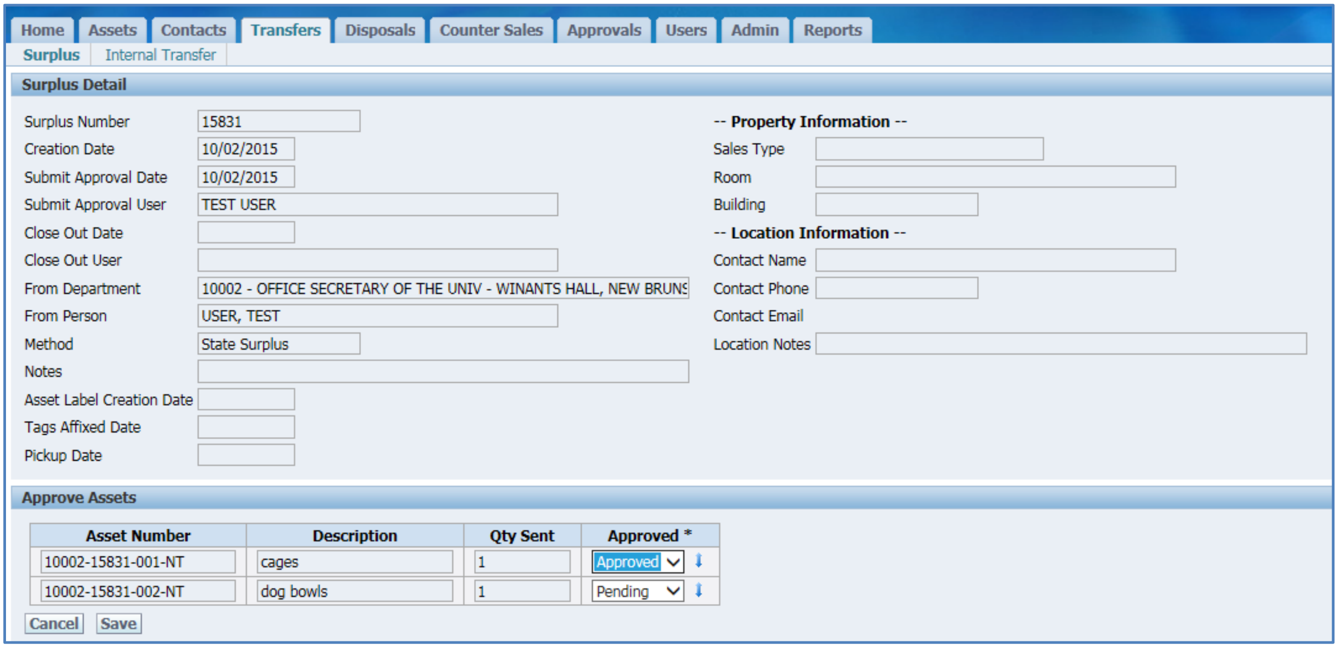
Email Approver access form can be found at http://material.rutgers.edu/surpluspickup.php

An email will be sent to the Departmental Approver after the requester clicks "Submit for Approval"

You will need to find the surplus transfer you need to approve "Transfers>Search". Then view the surplus transfer and click the Approve button at the bottom of the Surplus Detail screen.



You will then be taken to a screen in which you will have an "Approved" drop down list option next to each asset listed. Click the Approved drop down list and chose either Approved or Rejected. If you have entered a number of assets you can use the blue arrow next to the Approved to do a "select all" once you choose the correct status. The system will then copy that status to every asset. Once you set the correct approved status, click the "Save" button.

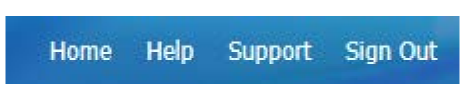


Surplus Close Out

A Surplus User can close a Surplus Transfer by using the “Close Out” Button. **Any item remaining on the on a Surplus request that has been Approved but not received into Surplus, will automatically be set to a Status of Void when the Close Out button is clicked.**

Support

For questions and/or other support, please click the Support link. System and support emails will be sent to an Admin email group as well as AssetWorks support.



Fill out the form and click Send Email and someone will contact you.