

Material And Logistical Services Surplus System User Guide

User Guide to Asset Management “Surplus Service Request” System



AssetW^oRKS

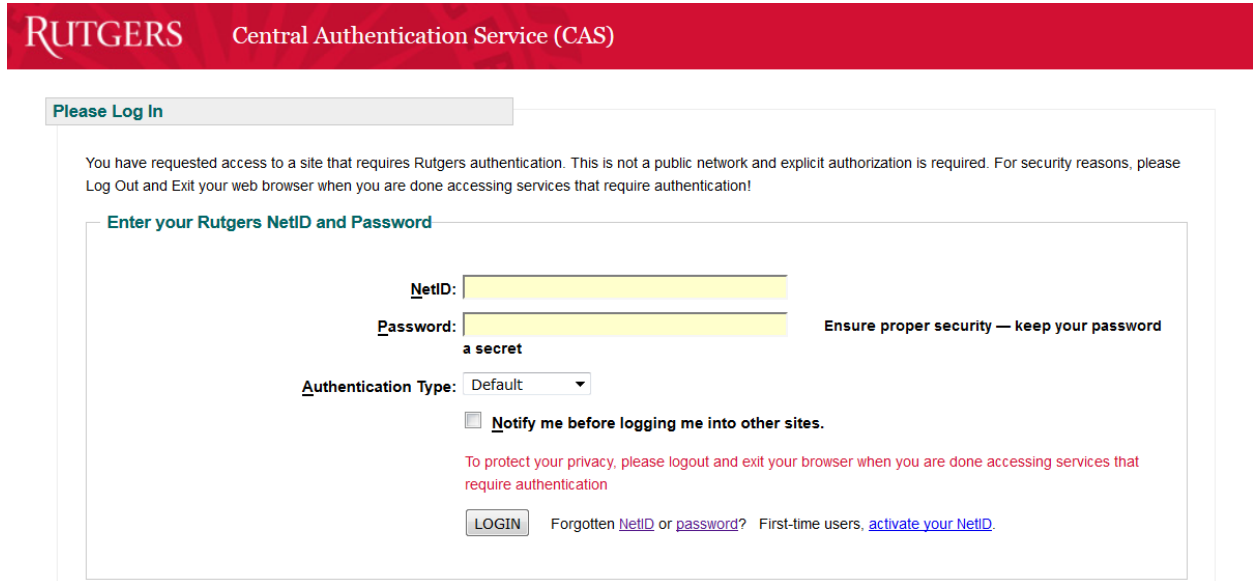
Contents

- Logging into the system 3
- Surplus Transfers (Transfers Tab) 4
 - Creating a Surplus 4
 - Surplus Header/Surplus Detail..... 6
 - Adding Asset/Property to a Surplus..... 7
 - Approving Surpluses 8

- Support 10

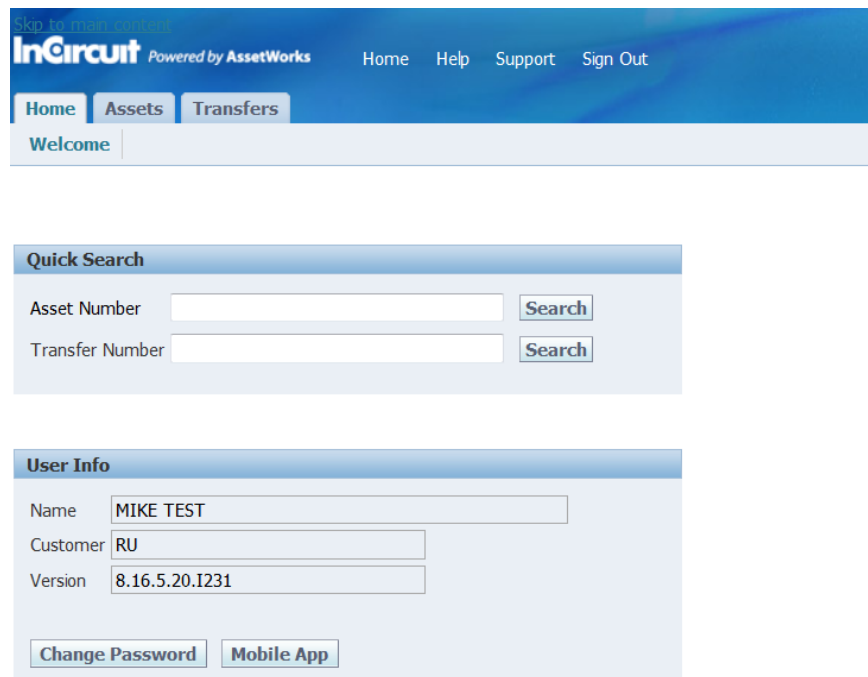
Logging into the system

Login via this link: [Rutgers University Surplus Login](#)



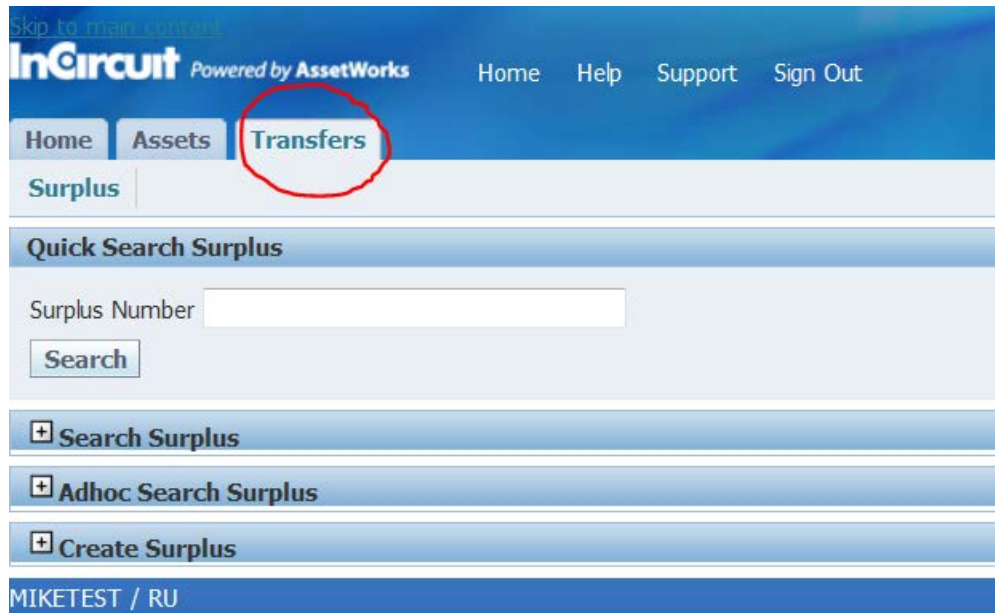
The image shows the Rutgers Central Authentication Service (CAS) login page. At the top, there is a red header with the Rutgers logo and the text "Central Authentication Service (CAS)". Below the header, there is a "Please Log In" section. The main content area contains a message: "You have requested access to a site that requires Rutgers authentication. This is not a public network and explicit authorization is required. For security reasons, please Log Out and Exit your web browser when you are done accessing services that require authentication!". Below this message is a form titled "Enter your Rutgers NetID and Password". The form includes fields for "NetID:" and "Password:", both highlighted in yellow. To the right of the password field is the text "Ensure proper security — keep your password a secret". Below the password field is a dropdown menu for "Authentication Type:" set to "Default". There is a checkbox for "Notify me before logging me into other sites." which is unchecked. Below the checkbox is a red warning message: "To protect your privacy, please logout and exit your browser when you are done accessing services that require authentication". At the bottom of the form are a "LOGIN" button, a link for "Forgotten NetID or password?", and a link for "First-time users, activate your NetID."

Upon successful login Users are taken to the Welcome Screen.



The image shows the InCircuit Welcome Screen. At the top, there is a blue header with the InCircuit logo and the text "Powered by AssetWorks". To the right of the logo are links for "Home", "Help", "Support", and "Sign Out". Below the header are three tabs: "Home", "Assets", and "Transfers". The "Home" tab is selected, and the text "Welcome" is displayed below it. Below the tabs is a "Quick Search" section with two input fields: "Asset Number" and "Transfer Number", each with a "Search" button. Below the search section is a "User Info" section with three input fields: "Name" (MIKE TEST), "Customer" (RU), and "Version" (8.16.5.20.1231). Below the user info section are two buttons: "Change Password" and "Mobile App".

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

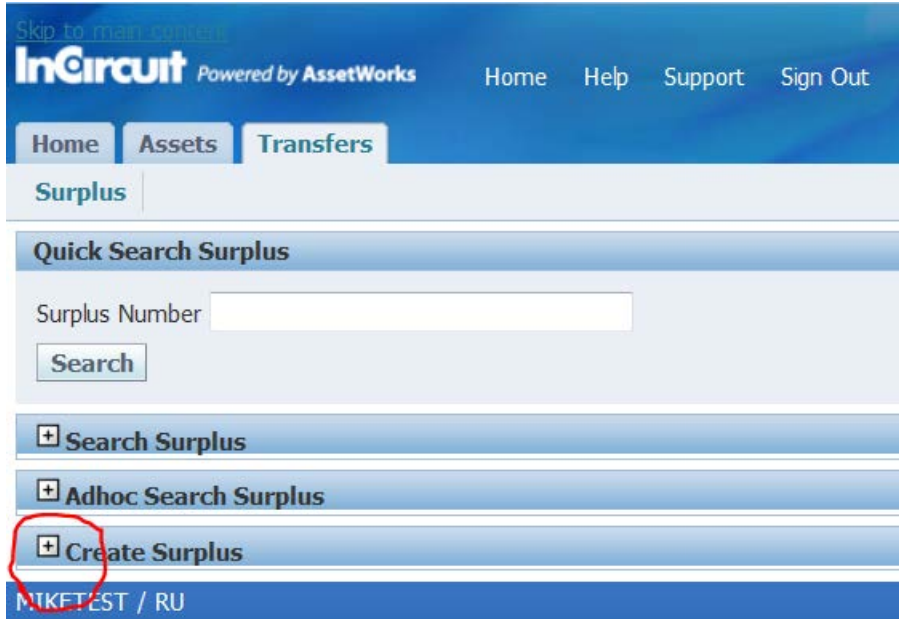


Surplus Transfers (Transfers Tab)

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.

The image shows a detailed view of the "Create Surplus" form. At the top, there are tabs for "Surplus" and "Internal Transfer". Below the tabs is a "Quick Search Surplus" section with a "Surplus Number" input field and a "Search" button. This is followed by two collapsed sections: "Search Surplus" and "Adhoc Search Surplus". The "Create Surplus" section is expanded and contains the following fields: "From Department *" with a dropdown menu showing "10002 - OFFICE SECRETARY OF THE UNIV" and a search icon; "Notes" with a text input; a section header "-- Property Information --" with a "Room" input field; another section header "-- Location Information --" with "Contact Name", "Contact Phone", and "Contact Email" input fields; and "Location Notes" with a text input. Below these fields is a "Terms and Conditions" section with a note: "Department User must review the [Rutgers Terms and Conditions](#) and click the checkbox in order to proceed." There is a checkbox labeled "I have read and agree to the above terms and conditions." and a "Create" button at the bottom.

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

Required fields have an * next to them.

Surplus Management Guide

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.

The screenshot displays the InCircuit Surplus Management interface. At the top, there is a navigation bar with 'Home', 'Assets', and 'Transfers' tabs, and a 'Surplus' sub-tab. Below this is a 'Quick Search Surplus' section with a search box and a 'Search' button. The main form is titled 'Create Surplus' and contains the following fields:

- From Department * 00000 - SURPLUS PROPERTY (with a magnifying glass icon)
- Notes
- Property Information section:
 - Building * (with a magnifying glass icon)
 - Room
- Contact Information section:
 - Contact Name * MIKE TEST
 - Contact Phone *
 - Contact Email * MICHAEL.MCDEDE@RUTGERS.EDU
- Location Notes

Below the form, there is a 'Terms and Conditions' section with a link to 'Rutgers Terms and Conditions' and a checkbox. The text reads: 'Department User must review the Rutgers Terms and Conditions and click the checkbox in order to proceed.' Below this, a warning message states: 'By checking the box below, you are confirming that the hard drives and storage media have been wiped clean or destroyed as per University Policy, and acknowledge user will be held lable if a breach is directly related to data left on storage medium found in surplus equipment.' The checkbox is checked, and the text reads: 'I have read and agree to the above terms and conditions.' At the bottom of the form, there is a 'Create' button, which is circled in red in the screenshot.

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

Surplus Management Guide

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".

The screenshot shows a web application interface for managing surplus transfers. At the top, it says "Surplus Internal Transfer" and "Successfully created Surplus Transfer." Below this is the "Surplus Detail" section, which is divided into two columns of fields. The left column includes: Surplus Number (15831), Creation Date (10/02/2015), Submit Approval Date, Submit Approval User, Close Out Date, Close Out User, From Department (10002 - OFFICE SECRETARY OF THE UNIV - WINANTS HALL, NEW BRUNSWICK), From Person (USER, TEST), Method (State Surplus), Notes, Asset Label Creation Date, Tags Affixed Date, and Pickup Date. The right column includes: Property Information (Sales Type, Room, Building) and Location Information (Contact Name, Contact Phone, Contact Email, Location Notes). At the bottom of the detail section are "Edit" and "Close Out" buttons. Below the detail section is the "Add Assets" section, which has a search box for "Asset Number" and buttons for "Add Asset", "Create New Asset", and "Transfer by Filter". At the very bottom, there is an "Import Assets" section with a message "There are no assets on this surplus." and buttons for "Cancel", "Remove Asset", "Receive", "Print Labels", and "Print Detail".

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.

The screenshot shows the "Add Assets" form. It features a search box for "Asset Number *" with a magnifying glass icon. Below the search box are three buttons: "Add Asset", "Create New Asset" (which is circled in red), and "Transfer by Filter".

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

Surplus Management Guide

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

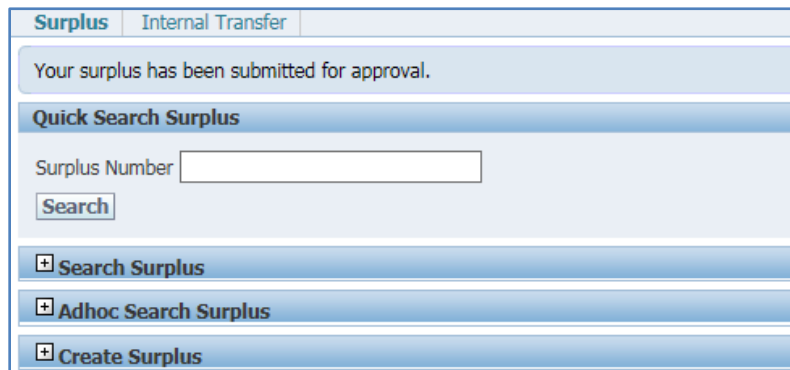
Approving Surpluses

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.



The screenshot shows a web interface with two tabs: 'Surplus' (selected) and 'Internal Transfer'. Below the tabs, a message states: 'Your surplus has been submitted for approval.' Underneath is a section titled 'Quick Search Surplus' containing a text input field for 'Surplus Number' and a 'Search' button. At the bottom of the interface are three expandable menu items: '+ Search Surplus', '+ Adhoc Search Surplus', and '+ Create Surplus'.

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.

The screenshot shows a web application interface for Surplus Management. At the top, there is a navigation menu with tabs: Home, Assets, Contacts, Transfers, Disposals, Counter Sales, Approvals, Users, Admin, and Reports. Below this, the 'Surplus' section is active, showing 'Internal Transfer' details.

Surplus Detail

Surplus Number: 15831
 Creation Date: 10/02/2015
 Submit Approval Date: 10/02/2015
 Submit Approval User: TEST USER
 Close Out Date:
 Close Out User:
 From Department: 10002 - OFFICE SECRETARY OF THE UNIV - WINANTS HALL, NEW BRUNSWICK
 From Person: USER, TEST
 Method: State Surplus
 Notes:
 Asset Label Creation Date:
 Tags Affixed Date:
 Pickup Date:

-- Property Information --
 Sales Type:
 Room:
 Building:

-- Location Information --
 Contact Name:
 Contact Phone:
 Contact Email:
 Location Notes:

Approve Assets

Asset Number	Description	Qty Sent	Approved *
10002-15831-001-NT	cages	1	Approved <input type="button" value="v"/> <input type="button" value="u"/>
10002-15831-002-NT	dog bowls	1	Pending <input type="button" value="v"/> <input type="button" value="u"/>

Surplus Close Out

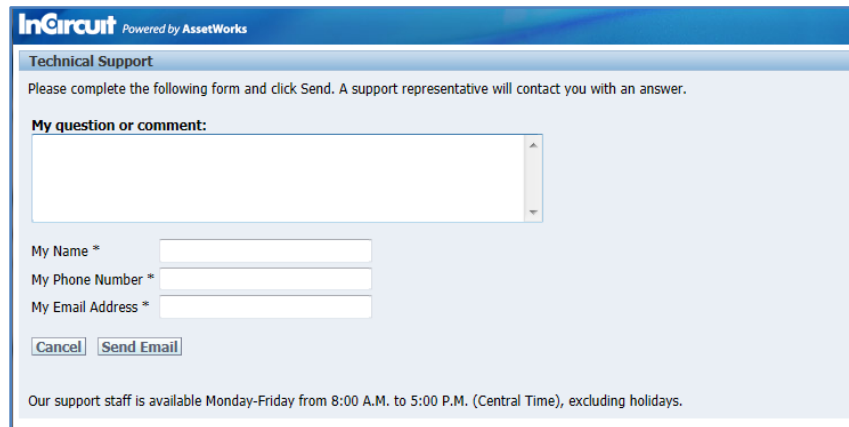
A Surplus User can close a Surplus Transfer by using the “Close Out” Button. **Any item remaining on the on a Surplus request that has been Approved but not received into Surplus, will automatically be set to a Status of Void when the Close Out button is clicked.**

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.

Surplus Management Guide

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



InCircuit Powered by AssetWorks

Technical Support

Please complete the following form and click Send. A support representative will contact you with an answer.

My question or comment:

My Name *

My Phone Number *

My Email Address *

Our support staff is available Monday-Friday from 8:00 A.M. to 5:00 P.M. (Central Time), excluding holidays.