PACS Surplus System Training Guide

Introduction

Welcome to the Procurement and Contracting Services (PACS) Asset Management Platform (AMP) by AssetWorks. AMP is web based and can be accessed anywhere internet access is available. Users will use their UA NetID login to access the system. The systems will be referred to as the Surplus system throughout this guide.

This guide will provide an overview of the system, including examples and screenshots, and how tasks are accomplished. This document will focus on the Department Approver and User roles. For answers to questions not covered in this guide, please contact PACS Surplus Property at 621-1754.

Logging into the system

The system can be accessed through the PACS Surplus website at http://pacs.arizona.edu. The Surplus system is developed and hosted by AssetWorks, third party vendor, and so does not feature any University branding.

If you're not currently logged in to another university site, the browser will load the following page:

DO NOT ENTER YOUR UA NETID OR PASSWORD ON THIS SCREEN.

Select the link "Login Using SSO". The link will forward you to the university's credential management login screen where you'll be required to enter your NetID and password.

If you have already logged into the UA network using your NetID, you will get the following confirmation page. Click on the "OK" button to be taken to the Welcome Screen within the Surplus system.
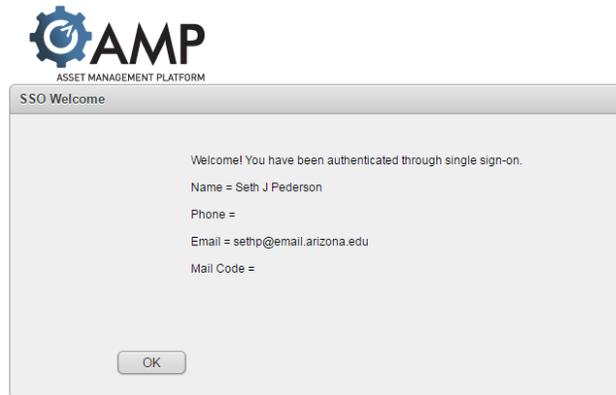
User Experience

Department staff will typically be assigned a Department User role or a Department Approver role. Department Users are department staff who may enter items into the system and initiate the surplus process. The Department User will only see the Home, Assets and Transfers tabs:
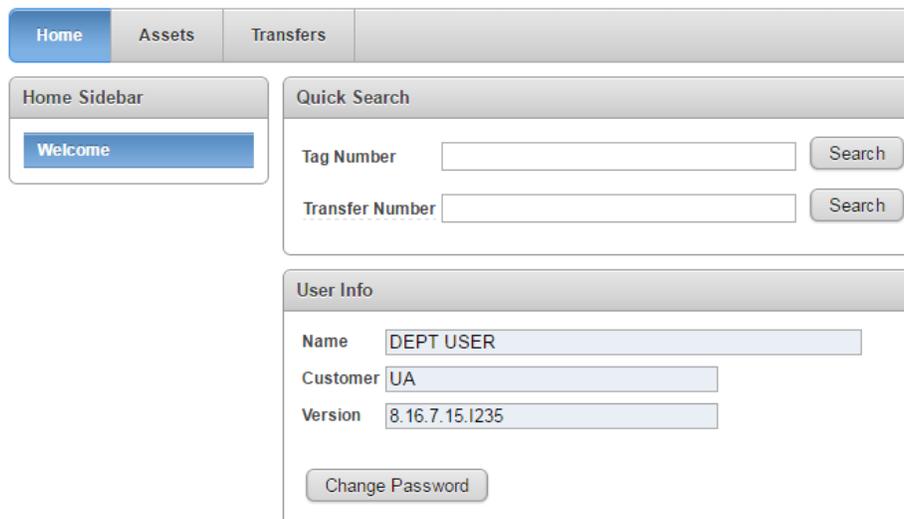
Department User View

The Department Approver is a department staff member who is authorized to approve asset transfers from the department to Surplus Property. In addition to approving Transfer Requests, Department Approvers also have the ability to associate other user accounts in the departments for which they have authority as Department Users for those departments and to run reports on assets that have been entered in to the Surplus system.

Department Approver View

Additional information regarding profile setup and configuration can be found in the Users section of this manual.

Assets

Asset Types

There are two types of assets in the Surplus Management System:

1. Tagged – Tagged assets are loaded nightly into the Surplus system from the university's UAccess Financials system. Assets entered that originate in the Financials system are tracked from acquisition to disposal.

2. Non-Tagged – Non-tagged assets are items acquired by departments that do not meet the requirements (determined by expense and/or acquisition method) to be "tagged" assets. Non-tagged assets are manually entered into the Surplus system, and are generally not entered until they are sent to Surplus. (Example: chairs, desks, filing cabinets)

Tagged asset information (detail pictured below) is continuously overwritten in the Surplus system when the asset data table is copied from Financials every night. Since the Financials system is the system of record, and is the source from which the asset table is regularly copied, any changes made to the asset in the Surplus system will be overwritten. Because of this, changes to asset details such as Class, Department and Location (Building and Room Number) should be made in the Financials system and not in the Surplus system.

Tags

When University property tag numbers are added to the new Surplus system, the numbers are both prepended and appended with new character strings for tracking and inventory. However, the original tag number is incorporated:

Property Tag

Non-Tagged assets will be assigned a tag number that is proprietary to the Surplus system as soon as a Transfer Request is approved. The Surplus tag number can only be searched/tracked in the Surplus system and cannot be verified in Financials.

Searching, Viewing and Updating Assets

Department Approver View

Quick Search - enter any portion of a Tag Number (see above) and then press the **Enter** key or click the **Search** button to retrieve a list of assets that have matching Tag Numbers.

Advanced Search - An advanced search and a report are essentially the same feature, so they are combined into this common screen. You can search the system by any field listed in the Advanced **Search**. You can create and save searches as reports. Please refer to the Reports section of this guide for further information.

Asset Detail Screen

All assets in the Surplus system will have an Asset Detail screen, either preloaded from UAccess Financials or loaded when entered onto a Transfer Request to be sent to Surplus Property.

Tagged Asset Detail Screen

Asset Detail

Cancel	Save Asset

Field	Value		Field	Value
Tag Number *	A270775		Status *	Active
Original Tag Number	A270775		**-- Acquisition --**	
Agency Code	11235		Original Acq Cost	$0.00
Class *	0744059 - COMPUTER/DESKTOP-PC		Original Acq Date	04/02/1996
Description	POWER STATION 16MB 128MB 15" MONITOR KEYBOARD,		Original Accounting Method	Original Purchase
Department *	0101 - CALS CAREER & ACAD SVCS		**-- Notes --**	
Building *	36 - FORBES		Notes 1	
Campus Code	MC		Notes 2	MC
Route Code	TA		UA Status Code	N
Room Number *	NO RM LC		**-- Surplus Use Only --**	
Redistribution Account *	2145000		Original Department	
Contact Person			Quantity *	1
Contact Phone			UoM *	EA
Contact Email	Email		Sales Price	
-- Summary --			Minimum Bid	
Condition	N-Not Applicable		Location	
Serial Num/VIN	-		Surplus Notes	
Make/Manufacturer	MANUFACTURER UNKNOWN			
Model	P100			
Model Year				
Mileage				

> Accounting
> Documents & Images
> History
> Validation
> Transfers

The Department User and Approver can update available fields. In order to save the changes, click the Save Asset button.

Icons

* ***** fields denoted with an " ***** " are required fields throughout the system.
* 🔍 indicates that the field must be completed from information provided in a drop down menu.
* ✏ indicates additional data is accessible by clicking on the icon
* ✉ indicates a Change Request must be completed to change informaton in this field

Asset Detail Fields:

Tag Number: The unique identifier assigned to the asset when it was added to surplus inventory. This number will not change until the asset has been added to a transfer request. If it has not been added to a transfer request, and the asset record originates from the Financials system, this field will display the University tag number.

Original Tag Number: The tag number assigned to the asset in the Financials system. This number originates from the Financials system.

Agency Code: This code originates from the Financials system.

Description: Description of the asset as it appears in the Financials System for tagged assets. Non tagged assets description will be entered by the department sending the item to surplus.

Department: This code originates from the Financials system.

Building: Drop down menu is the approved listing for buildings on campus. No other information can be entered.

Campus Code: This code originates from the Financials system.

Route Code: The system will determine this from the building number.

Room Number: This code originates from the Financials system.

Redistribution Account: This is the account number into which the department wants any funds from the sale of their item to be credited (amounts are determined according to the PACS Fees Schedule available on the Surplus Property web page).

Contact Person: This field will always be empty because contact information is not assigned at the asset level in the Financials system.

Contact Phone: This field will always be empty because contact information is not assigned at the asset level in the Financials system.

Contact Email: This field will always be empty because contact information is not assigned at the asset level in the Financials system.

Condition: Information will come from the Transfer request for non-tagged assets, if available.

Make/Manufacturer: This Information originates from the Financials system or the Transfer request, if available.

Model Year: This information originates from the Financials system or the Transfer request, if available.

Mileage: Information will come from the Transfer request for non-tagged assets, if available.

Status: This refers to the status of the asset in the Surplus system.

Original Acquisition Cost: This code originates from the Financials system, if available.

Acquisition Date: This code originates from the Financials system, if available.

Original Accounting Method: This code originates from the Financials system, if available.

Notes 1: Information will come from the Transfer request for non-tagged assets, if available.

Notes 2: Information will come from the Transfer request for non-tagged assets, if available.

UA Status Code: This code originates from the Financials system.

Original Department: This code originates from the Financials system.

Quantity: Information will come from the Transfer request for non-tagged assets, if available.

UoM (Unit of Measure): Information will come from the Transfer request for non-tagged assets, if available.

Minimum Bid: Information will come from the Transfer request for non-tagged assets, if available.

Location: This field is blank and is not used when transferring either a tagged or non-tagged asset to Surplus.

Surplus Notes: Information entered into Surplus Notes will be used to locate the item in the building (such as reception area, hallway, etc.), as well as any contact and/or pickup information that the driver will need to know ("please call", "see (name) for the key", etc.).

Additional Screens

Accounting – This region displays the original acquisition and eventually the disposal accounting entry (assuming it was entered into Financials).

Document & Images – This screen enables PACS Surplus Property staff to add documents or images to the asset (10 Max). Note that any documents or images added to a received Surplus asset will display on the Web Surplus site. This function is not available for department use.

History – This region displays the history of an asset.

Validation – This region displays validation entries that are created when an inventory is conducted via AssetWorks Scan & Validate application. We are currently not using this feature.

Transfers – This region displays the transfer history of an asset.

Non-Tagged Asset Detail Screen

The Non-Tagged Asset screen will appear after the asset is added to a Transfer Request. The screen will appear with slightly different fields from the tagged asset.

Transfer Requests (Transfers Tab)

This screen allows you to search for or initiate new Transfer Requests (formerly known as Disposal Requests).
Department Users and Approvers will only see assets owned by their department(s). Every time a Transfer Request is created, it's given a unique number for tracking.

Transfer Requests Overview

1. **Quick Search Transfers**
   In order to quickly search for an existing Transfer Request by its Surplus Number, enter a Surplus Number into the field and press the **Enter** key or click the **Search** button.

2. **Search Surplus**
   In order to perform a more advanced search of existing Transfer Requests, click the **Plus** icon on the Search Surplus region. This will open up the region and allow you to specify additional criteria.

3. **Create Surplus**
   In order to initiate a new Transfer Request of one or more assets, click the **Plus** icon on the Insert Surplus region, enter the header information relevant to the transfer, then click the **Create** button. This will create the transfer header and then take you to a new screen where you can specify the assets you are placing onto the transfer.

Creating a Transfer Request

A Transfer Request must be created before assets can be added to the Request. In order to initiate a new Transfer Request of one or more assets, click the **Plus** icon in the Create Surplus region. The Sending Department information relevant to the transfer will prepopulate, then click the **Create** button. This will generate the Transfer Request where you can specify the asset(s) you want to transfer.

From Department: The From Department is determined by the department of the User creating the request. Note: this will default to only the Department or Departments the User has been assigned to. If you are assigned to more than one Department, you will have to use the lookup option by typing in the name or clicking on the magnifying glass to search.

Notes: Enter any notes into this field. **Used for internal department notes relevant ONLY to the transfer** request; i.e. clearing out Dr. Spock's office.

Disposal Type: This is a lookup of available Disposal Types for the Transfer Request including the following – Department Drop Off, Government Sale, Special Bid Sale, and Surplus Pickup.

Contact Name: This will be filled automatically with the contact person for the department. Enter the Contact Name of the person who is the best person to contact regarding this Transfer Request if different from the department contact.

Contact Phone: Enter the Contact person's phone number for this surplus request.

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

Location Notes: Location notes are only for the department. They will not be seen by the PACS drivers. **These should *NOT* be used to specify where to pick up an asset. **

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

Surplus Detail

Once a Transfer Request is created, the Surplus Detail screen will be populated. It shows the data that was just entered to create the Transfer Request as well as the Surplus Number (every time a Transfer Request is created, it's given a unique number for tracking) and the Creation Date of the transfer.

Surplus Detail

Surplus Number	14	
Creation Date	07/20/2016	
Submit Approval Date		
Submit Approval User		
Close Out Date		
Close Out User		
From Department	0101 - CALS CAREER & ACAD SVCS - FORBES 201, TUCSON AZ 85721	
From Person	USER, DEPT	
Method	State Surplus	
Notes		

-- Property Information --
Disposal Type Surplus Pickup
-- Contact Information --
Contact Name DEPT USER
Contact Phone 520-621-1234
Contact Email DEPTUSER@EMAIL.ARIZONA.EDU
Location Notes

[Edit] [Submit For Approval]

⊙ Documents & Images

Add Assets

Tag Number * [   ] 🔍
[Add Asset]

Create New Asset   Transfer by Filter

Assets

There are no assets on this surplus.

[Cancel] [Remove Asset] [Receive] [Print Labels] [Print Detail]

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

Adding Asset/Property to a Transfer Request

After the Transfer Request has been created the user can add assets to the surplus in 3 ways:

1. If the asset is a Tagged Asset, type in part of the tag number in the Tag Number field. When the correct asset appears, click on it and click the **Add Asset** button. The asset will then appear under the Assets region. Continue this process to add each Tagged asset onto the Transfer Request.

Surplus Detail

Surplus Number	14	
Creation Date	07/20/2016	
Submit Approval Date		
Submit Approval User		
Close Out Date		
Close Out User		
From Department	0101 - CALS CAREER & ACAD SVCS - FORBES 201, TUCSON AZ 85721	
From Person	USER, DEPT	
Method	State Surplus	
Notes		

-- Property Information --
Disposal Type Surplus Pickup
-- Contact Information --
Contact Name DEPT USER
Contact Phone 520-621-1234
Contact Email DEPTUSER@EMAIL.ARIZONA.EDU
Location Notes

[Edit] [Submit For Approval]

⊙ Documents & Images

Add Assets

Tag Number * [A259462 - 52" ZENITH PRO] 🔍
[Add Asset]

Create New Asset   Transfer by Filter

Assets

View	Tag Number	Description	Serial Num/VIN	Qty Sent	Qty Rcvd	Sales Price	Scrap	Status	Receiver	Recv Date	Approve Date	Docs
📝	A270776	POWER STATION 16MB 128MB 15" MONITOR KEYBOARD, MOUSE	-	1	-	$0.00	-	In Transfer	-	-	-	0

Download

[Cancel] [Remove Asset] [Receive] [Print Labels] [Print Detail]

2. If non-tagged assets need to be added to the Surplus, click on the **Create New Asset** link.

This will bring up a new window where a non-tagged asset can be created and added.

Description: Enter the basic information to describe the item. Surplus will use this description to identify the item upon receipt. Example: office chair, conference table

Building: Select the building from the drop down list. This information is used to both locate the item and to determine the route code that Surplus will assign for pick up.

Redistribution Account: Departments can choose any number from the drop down list for their department. The preferred number(s) will be indicated as Preferred in the list.

Surplus Notes: Information entered into Surplus Notes will be used to locate the item in the building (such as reception area, hallway, etc.), as well as any contact and/pickup information that the driver will need to know ("please call", "see (name) for the key", etc.).
*Note: if the information is different for each item, Surplus Notes must be filled out for each item being sent to Surplus.***

Notes: We have not identified a specific use for the Notes 1 and Notes 2 fields. Any information entered in these fields will only display on the asset history.

Quantity: If sending multiple items of the same type, enter a quantity here. Ex: 4 chairs that are exactly the same description.

UofM: Unit of Measure – Use the drop down menu to further describe the items being entered on the Transfer.

Minimum Bid: This is not required and should be rarely used. Surplus Property staff will determine item pricing when it is received at Surplus.

Once all required data has been entered, the **Save & Same** button will 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.

3. To add a group of assets at one time click on the **Transfer by Filter** option.

    The Transfer by Filter Screen will default to the Asset Active Status and the Department Number used in the Transfer Request, additional filtering criteria can be added.

Once you have the list of assets you intend to transfer, click the **Add to Transfer** Button.

Once the user has added all of the assets to the Transfer Request they can remove assets that may have been added incorrectly. **Note**: Assets added incorrectly must be removed before the Transfer Request is submitted for approval.

View	Tag Number	Description	Serial Num/VIN	Qty Sent	Qty Rcvd	Sales Price	Scrap	Status	Receiver	Recv Date	Approve Date	Docs/Images	Notes
✎	A268749	WORKSTATION/COMPUTER	NA	1	-	$0.00	-	In Transfer	-	-	-	0	-
✎	A281016	CABINET	NONE	1	-	$0.00	-	In Transfer	-	-	-	0	-

Download

row(s) 1 - 2 of 2

Cancel   Remove Asset   Receive   Print Labels   Print Detail

Submit for Approval

Once the Transfer Request is complete, click the "**Submit for Approval**" button. This will send the transfer for approval to the Department Approver. The Department Approver will receive an email that a Transfer Request has been submitted and is awaiting approval.

Departments will not be printing labels for items in the Surplus system.

Transfers of Federally Owned or Titled Assets

In order to prevent the inappropriate sale of assets associated with grants and contracts, an additional step is required when adding these assets to the Transfer Request. The sending department will need to set a flag that will route the Transfer Request to Sponsored Projects for their review and approval before the asset can be transferred to Surplus Property. This only applies to tagged assets with the following Agency Codes in UAccess Financials:

13

55062	US Army - UA Owned
55065	US Navy - UA Owned
55068	US Air Force - UA Owned
55071	NASA/JPL - UA Owned
55077	Misc US Energy - UA Owned
56092	Misc US DOD - UA Owned

In order to obtain approval for assets with these agency codes to be sent to Surplus, add the tagged asset to the Transfer Request. Go to the Asset Detail as you would to set the quantity or add a Surplus Note.

Click on the ✉ icon next to the **Agency Code Approval** field on the Asset Detail. This will bring up a Change Request screen. Use the drop down menu to select **Waiting for Approval.** This will trigger an email to be sent to Sponsored Projects. They will review the asset and then approve or reject it for surplus. If it is approved, it will appear on the Surplus Property reports to be picked up. If it is rejected

Approving the Transfer

Once the Transfer Request has been submitted for approval the Department Approver will receive an email that a Transfer Request is pending approval.

This is an automated e-mail to inform you that Surplus 16263 has assets that have not been approved.

Surplus Creation Date: 06/10/2016
Sending Department: 0410 - SCHOOL OF ANTHROPOLOGY
Sending Warehouse:
Sending Person: DEPT USER DEPTUSER@XXXX.COM
Receiving Department: 0000 - SURPLUS PROPERTY
Pickup Person:

Assets Waiting For Approval

| Asset Number	Description	Class
0410-16263-001-NT	Laptop	MISCELLANEOUS - MISCELLANEOUS
0410-16263-003-NT	Camera	MISCELLANEOUS - MISCELLANEOUS
0410-16263-004-NT	iPad	MISCELLANEOUS - MISCELLANEOUS
0410-16263-002-NT	Laptop	MISCELLANEOUS - MISCELLANEOUS

NOTICE: This e-mail was sent from an automated system that cannot accept incoming e-mail. Please do not reply.

 To view all pending approvals, navigate to the Transfers tab and select "**Adhoc Search**". Set the filter to "**5. Waiting for Approval**".
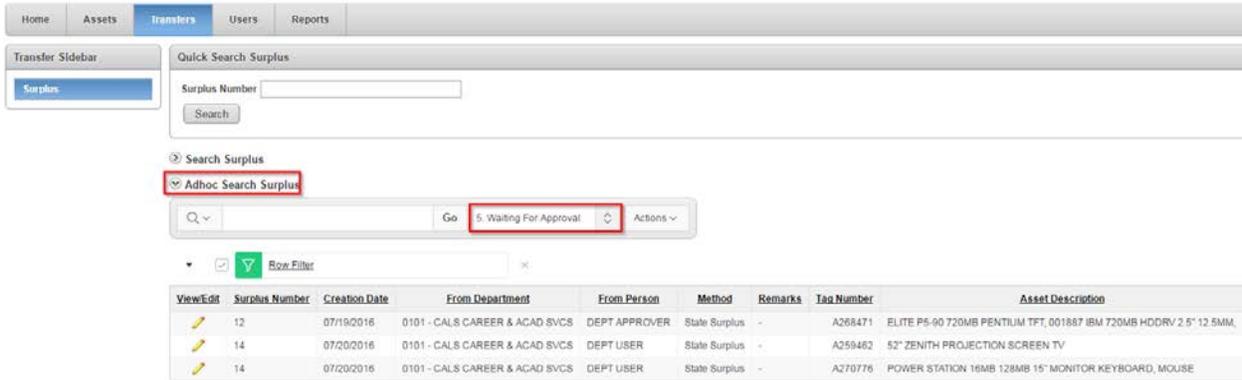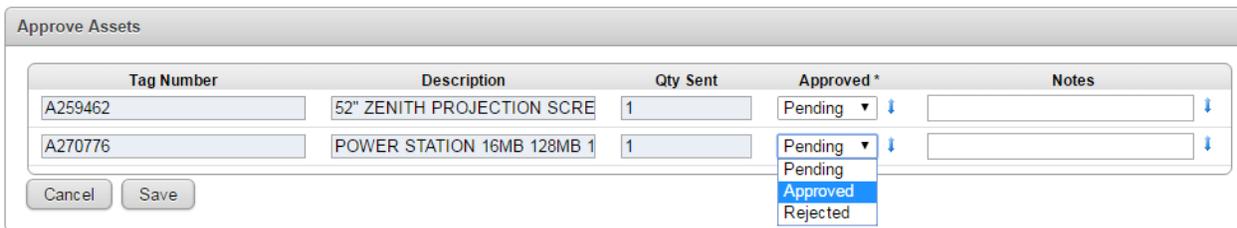
Department Approver View

To approve the transfer, click on the **pencil View/Edit** icon. In the Surplus Detail Screen click the **Approve** Button below the Asset Grid.
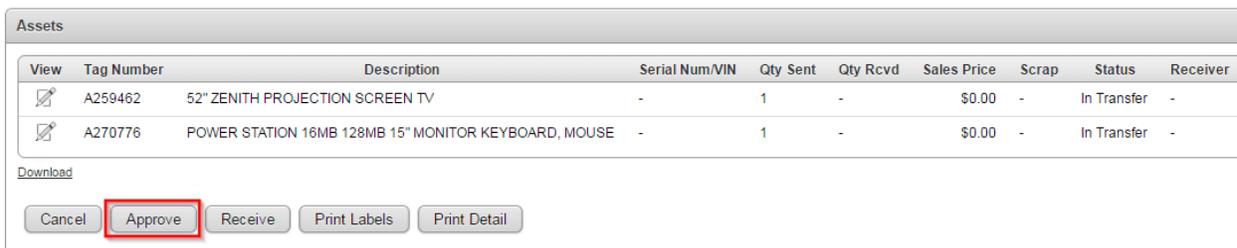
In the Approve Asset Grid, change the Approved drop down, select **Approved** or **Rejected** (add notes for reason rejected) and any optional notes needed. After choosing Approved or Rejected, the down arrow can be used to assign the same choice to all the items on the Transfer Request.

Click the **Save** Button to complete the approval.

The status of the assets is changed to "In Transfer" and an Approve Date is added to the asset.

Transfer Request Next Steps

Once the Department Approver has approved the Transfer Request, the Surplus office will schedule a date to pick up the item. The surplus personnel will refer to the information entered in the Surplus Notes field on the asset for its location in the building (such as room number) and for specific instructions (such as "Please contact the front desk for access to the room").

The Department Approver can check on the item's status using the **Adhoc Search Surplus** function in the Transfers tab. The Adhoc reports may be used to search for a specific asset number:

The Department User can also use the set of default Adhoc Reports for a more comprehensive view of Transfer Requests and statuses in the department:
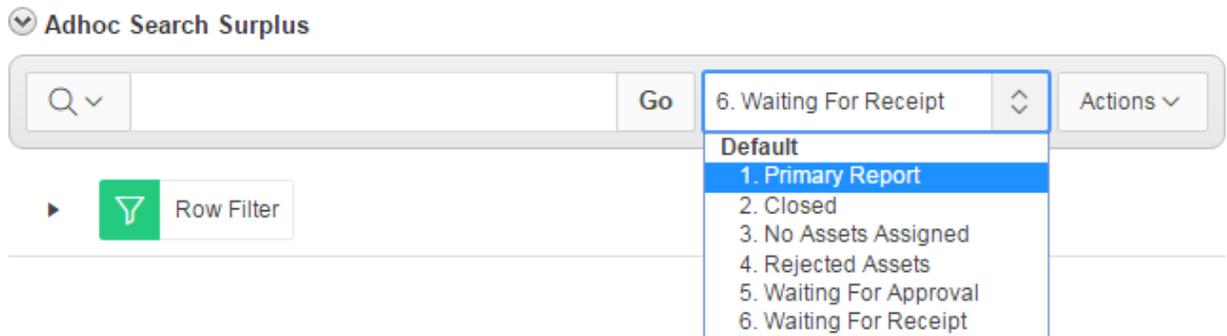
The Adhoc Reports provide the following information:

1. Primary Report – Provides a comprehensive view of all outstanding (Unassigned, Waiting for Approval, or Waiting for Receipt) Transfer requests. Any Transfer Request that qualifies for this report requires additional action.
2. Closed – Provides a list of Transfer Requests for which no additional actions are necessary. A "closed" Transfer Request can be a request which has completed the Surplus process (in which case the assets have been added to Surplus inventory). "Closed" can also indicate that the Transfer Request has been "Closed Out" – this may apply in cases which the entire Transfer Request has been terminated prior to being received by the Surplus department.
3. No Assets Assigned – Provides a list of Surplus Requests that have been generated but that have no items assigned to them.
4. Rejected Assets – Provides a list of items that were submitted for Surplus but that were rejected either by the Approver or by the Surplus Department.
5. Waiting for Approval – Provides a list of Transfer Requests submitted by a Department User and that must be approved by a Department Approver before qualifying for Surplus pick up.
6. Waiting for Receipt – Provides a list of Transfer Request that have been submitted and approved. Items on this report will be picked up by Surplus.

Disposals

Disposals are for use by the Surplus Department staff when items will be either sent for scrap or to the trash.

Users

User Profiles

Users will automatically be associated with their home department when they access the system. Department Approvers can associate additional departments with a Department User within their approval authority.
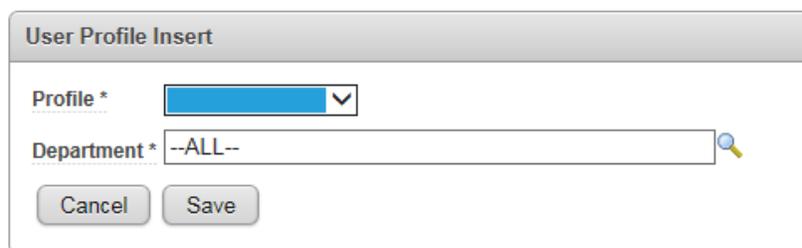
Adding Users to Your Department

Click on the **User** tab and search for the user for which the profile needs to be updated. Then view the **User Detail.**

Then click the **Add Profile** button.

Select the **User Profile** and find the specific department to be added from the drop down list. Then click **Save**. Department approvers will not be able to add Users from outside their departments. This can be done by Surplus Property staff by sending them a detailed email request.

If a user needs to be removed from a department, send a detailed email to the Surplus Property Staff.

Adding Approvers to Your Department

Additional Department Approvers can be added to your department. This function is limited to Surplus Property staff. Approvers can be added by sending a detailed email to Surplus Property.

Reporting

Overview

Once there is sufficient activity in the new system, report information will be analyzed. Based on this, Report access will be determined by Surplus Property. For now, only the Advanced Search is available.

Advanced Search

The Advance Search allows a user to search by many of the fields in the surplus system. Use drop down menus for the Filter Column, Filter Operator, and Filter Expression to enter the information that you want to use in your search. Multiple rows of filters can be entered by using the **Add Filter** or **Delete Filter** buttons. Click the **Run Report** button to see your results. You can create a report which can be viewed on screen as a PDF or download the information into an excel spreadsheet. The **Download** button is located right below your results on any screen where the download function is allowed.