

# Surplus Management

## User Guide

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September 2021



**RUTGERS**

Institutional Planning  
and Operations



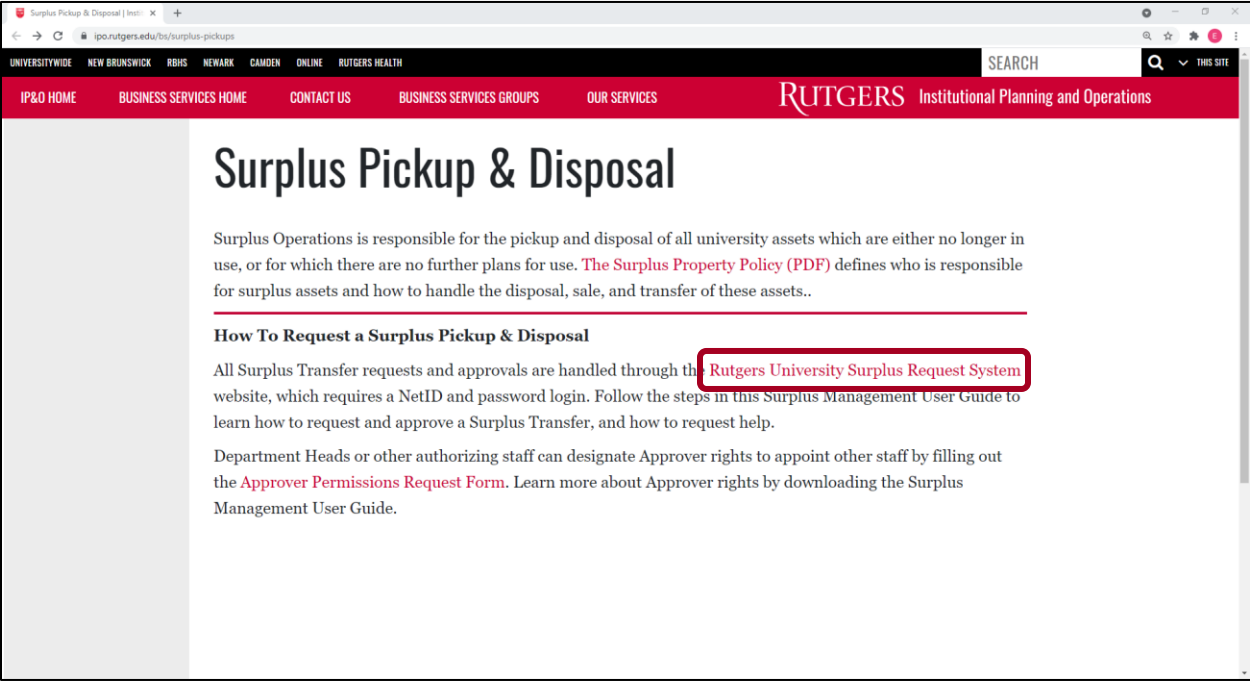
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# Accessing the Surplus Management System

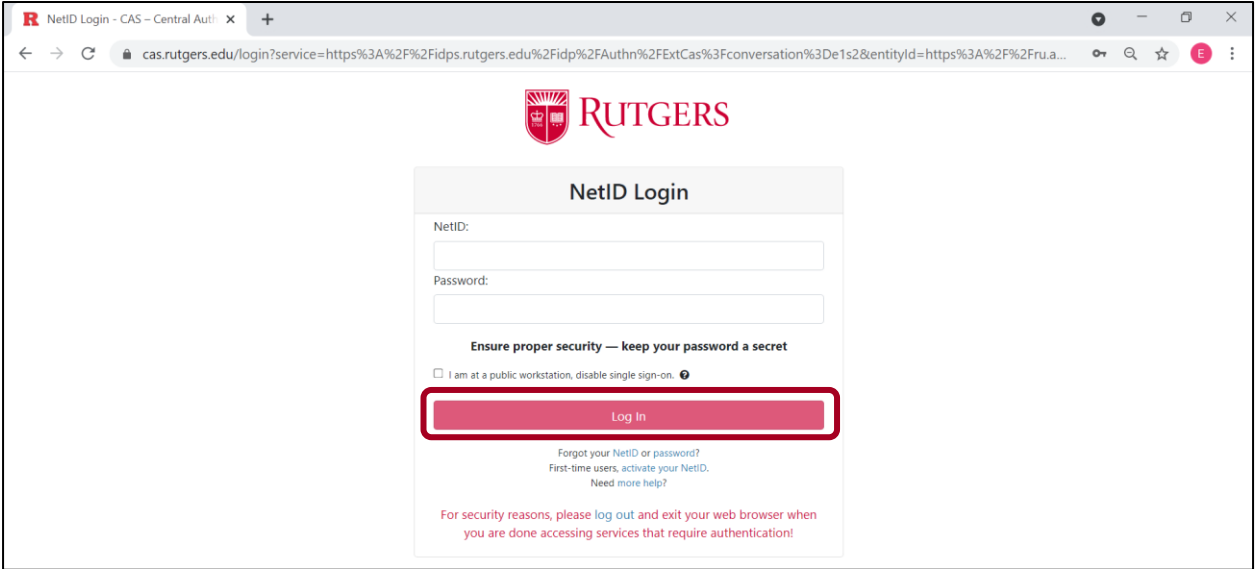
1. Navigate to the <https://ipo.rutgers.edu/bs/surplus-pickups> webpage. Click **Rutgers University Surplus Request System**.



2. Log in with Rutgers **Net ID** and **Password**.



**NOTE:** If you are already logged in with your Rutgers **Net ID** and **Password**, the page will automatically redirect to the system.



## Understanding the Surplus Management System

The Surplus Management System is provided by AssetWorks.

This system has two main purposes:

1. [Requesting a Surplus Transfer](#)
2. [Approving a Surplus Transfer](#)



**KEY:** A **Transfer**, also known as a **Surplus Transfer**, refers to a surplus pickup of an item(s) that is scheduled to be removed from the university. The Surplus Operations team handles this. Surplus Operations differs from Property Management, which handles internal property transfers from one Rutgers department to another.

Rutgers' employees can use their Net ID and password can be a **Requestor** (also known as a **Surplus User**). A **Requestor** is a person who requests a transfer.

Certain permissions apply to people approving transfer requests. **Departmental Approvers** (also known as **Approvers**) must be authorized by their Department Head or another authorized staff to approve transfer requests. To become an authorized **Approver**, see the [Requesting Approver Permissions](#) section. There can be multiple **Approvers** per department, but each **Approver** must be authorized.



**HINT:** Follow the [Requesting Support](#) directions to request help.

# Requesting a Surplus Transfer



**KEY:** To initiate a Surplus Transfer of one or more assets: (1) create a new Surplus Transfer and (2) add assets to the Surplus Transfer request.

- 1. Click the **Transfers** tab.



**NOTE:** If the **Surplus Transfer** section is not already open, click **Create Surplus Transfer**.

Welcome HENRY RUTGERS / RU Home Help Support Sign Out

Home Assets **Transfers**

Transfer Sidebar

Surplus

Quick Search Surplus Transfers

Surplus Transfer Number

Search

Search Surplus Transfers

Adhoc Search Surplus Transfers

**Create Surplus Transfer**

From Department \*

Notes

-- Property Information --

Building \*

Room

-- Contact Information --

Contact Name \*

Contact Phone \*

Contact Email \*

Location Notes

**Terms and Conditions**

Department User must review the [Rutgers Terms and Conditions](#) and click the checkbox in order to proceed.

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 liable if a breach is directly related to data left on storage medium found in surplus equipment.

I have read and agree to the above terms and conditions.

Create

## Surplus Management

2. Enter all required information and any additional information as needed.



**NOTE:** Some information will appear pre-filled, but it can be edited. For example, if you are not the on-site contact for this surplus, enter the appropriate **Contact Name**, **Phone**, and **Email**.

**Create Surplus Transfer**

From Department \* 10501 - IPO-EMPLOYEE SERVICES

Notes test

-- Property Information --

Building \* 3008 - GRADUATE SCHOOL OF SOCIAL WORK BUILDING

Room 012

-- Contact Information --

Contact Name \* JOHN DOE

Contact Phone \* 555-555-5555

Contact Email \* JOHNDOEFAKE@RUTGERS.EDU

Location Notes test

**Terms and Conditions**

Department User must review the [Rutgers Terms and Conditions](#) and click the checkbox in order to proceed.

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 liable if a breach is directly related to data left on storage medium found in surplus equipment.

I have read and agree to the above terms and conditions.

Create



**HINT:** The **From Department** field will be filled out. Begin typing a building name or number and select the appropriate choice from the menu.

**Create Surplus Transfer**

From Department \* 10501 - IPO-EMPLOYEE SERVICES

Notes test

-- Property Information --

Building \* 3008 - GRADUATE SCHOOL OF SOCIAL WORK BUILDING

Room 012

-- Contact Information --

Contact Name \* JOHN DOE

Contact Phone \* 555-555-5555

Contact Email \* JOHNDOEFAKE@RUTGERS.EDU

Location Notes test

**Terms and Conditions**

Department User must review the [Rutgers Terms and Conditions](#) and click the checkbox in order to proceed.

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 liable if a breach is directly related to data left on storage medium found in surplus equipment.

I have read and agree to the above terms and conditions.

Create



3. Read the terms and conditions, and then check the box to agree. Click **Create**.

➤ Create Surplus Transfer

From Department \* 0 - ALL DEPARTMENTS

Notes test

-- Property Information --

Building \* 3008 - GRADUATE SCHOOL OF SOCIAL WORK BUILDING

Room 012

-- Contact Information --

Contact Name \* JOHN DOE

Contact Phone \* 555-555-5555

Contact Email \* JOHNDOEFAKE@RUTGERS.EDU

Location Notes test


**Terms and Conditions**

Department User must review the [Rutgers Terms and Conditions](#) and click the checkbox in order to proceed.

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 liable if a breach is directly related to data left on storage medium found in surplus equipment.

I have read and agree to the above terms and conditions.


Create

4. The page will refresh. Information from the previous screen will be shown in the **Surplus Detail** section. If necessary, click **Edit** to revise any information. Then scroll down .



**KEY:** A **Surplus Number** and **Creation Date** are autogenerated for tracking purposes. Keep this information for your records.

Welcome HENRY RUTGERS / RU Home Help Support Sign Out

 RUTGERS

Home Assets **Transfers**

Successfully created Surplus Header. Please add your assets.

Transfer Sidebar

Surplus

**Surplus Detail**

Surplus Number 13328

Creation Date 05/20/2021

Submit Approval Date

Submit Approval User

Close Out Date

Close Out User

From Department 0 - ALL DEPARTMENTS - ADMIN SERVICES BLDG ANNEX I, PISCATAWAY NJ 088

From Person RUTGERS, HENRY

Method State Surplus

Notes test

Asset Label Creation Date

Tags Affixed Date

Pickup Date

Edit

-- Property Information --

Sales Type

Building 3008 - GRADUATE SCHOOL OF SOCIAL WORK BUILDING

Room 012

-- Contact Information --

Contact Name JOHN DOE

Contact Phone 555-555-5555

Contact Email JOHNDOEFAKE@RUTGERS.EDU


Location Notes test

Add Assets

Asset Number \*

Add Asset

Create New Asset Transfer by Filter



## Surplus Management

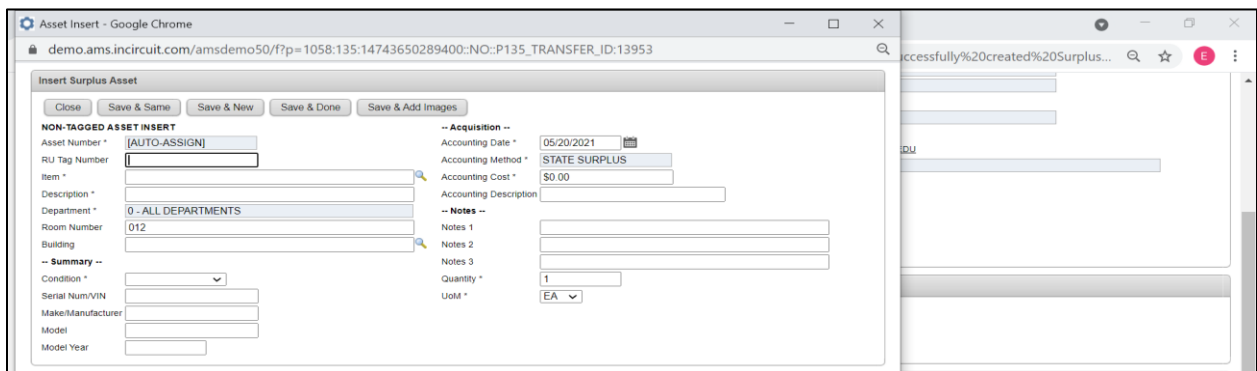
5. Click **Create New Asset** to begin adding assets to the surplus request.



The screenshot shows a web interface for adding assets. At the top, there is a section titled "Add Assets" with an "Asset Number" input field and an "Add Asset" button. Below this, the "Create New Asset" button is highlighted with a red box, and a "Transfer by Filter" link is visible. Underneath, there is an "Assets" section that currently displays "There are no assets on this surplus." and includes "Cancel", "Remove Asset", and "Print Detail" buttons.

6. A pop-up tab will appear. Enter all required information. For **Building Name** or **Number** begin typing the appropriate phrase and select from the menu provided.

Enter additional information as needed.



The screenshot shows a browser window with a pop-up window titled "Insert Surplus Asset". The pop-up window has several tabs: "Close", "Save & Same", "Save & New", "Save & Done", and "Save & Add Images". The main content area is titled "NON-TAGGED ASSET INSERT" and contains various input fields and sections:

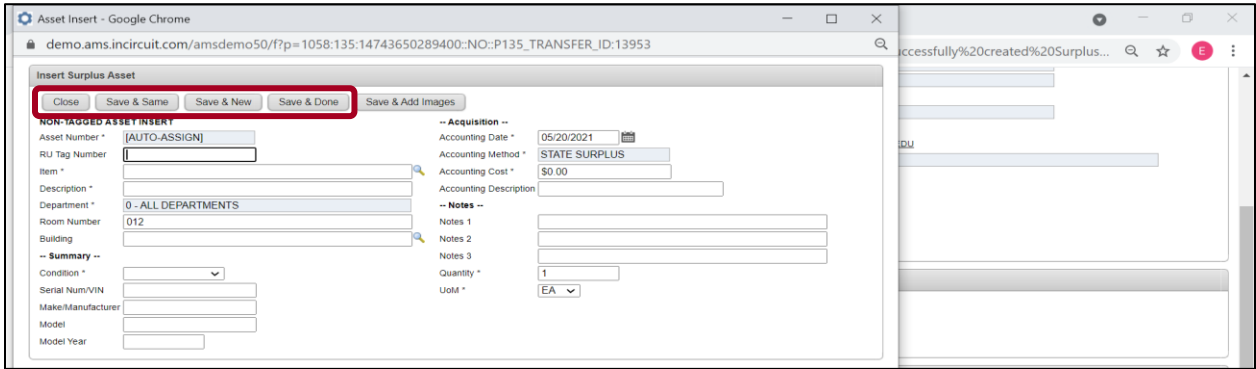
- Asset Number**: [AUTO-ASSIGN]
- RU Tag Number**: [1]
- Item**: [ ]
- Description**: [ ]
- Department**: 0 - ALL DEPARTMENTS
- Room Number**: 012
- Building**: [ ]
- Summary**: [ ]
- Condition**: [ ]
- Serial Num/VIN**: [ ]
- Make/Manufacturer**: [ ]
- Model**: [ ]
- Model Year**: [ ]
- Acquisition**: [ ]
- Accounting Date**: 05/20/2021
- Accounting Method**: STATE SURPLUS
- Accounting Cost**: \$0.00
- Accounting Description**: [ ]
- Notes**: [ ]
- Quantity**: 1
- UoM**: EA

7. When finished entering information, click one of the following:

Button	Action
<b>Close</b>	Closes the asset pop-up without saving.
<b>Save &amp; Same</b>	Saves the asset and creates a new asset pop-up with the same information. This allows for minimal edits of the new asset.
<b>Save &amp; New</b>	Saves the asset and opens a new, blank asset pop-up.
<b>Save &amp; Close</b>	Saves the asset and closes the asset pop-up.



**CAUTION:** This step only adds the assets to the request. It does not submit the request. To submit, follow Steps 8-10.




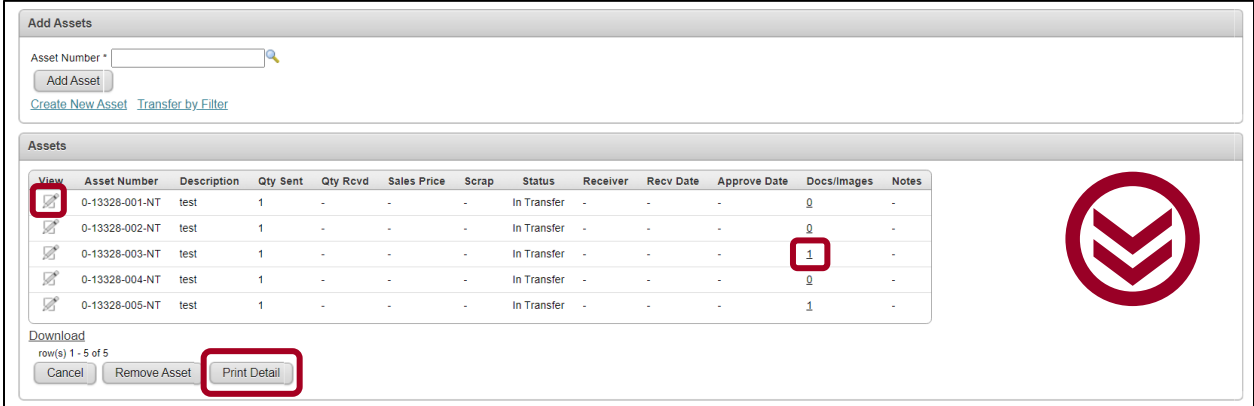
8. Review all the assets added.

If desired, click **Print Detail** to refresh the page to a printable PDF of all assets.

After reviewing all assets, scroll down.

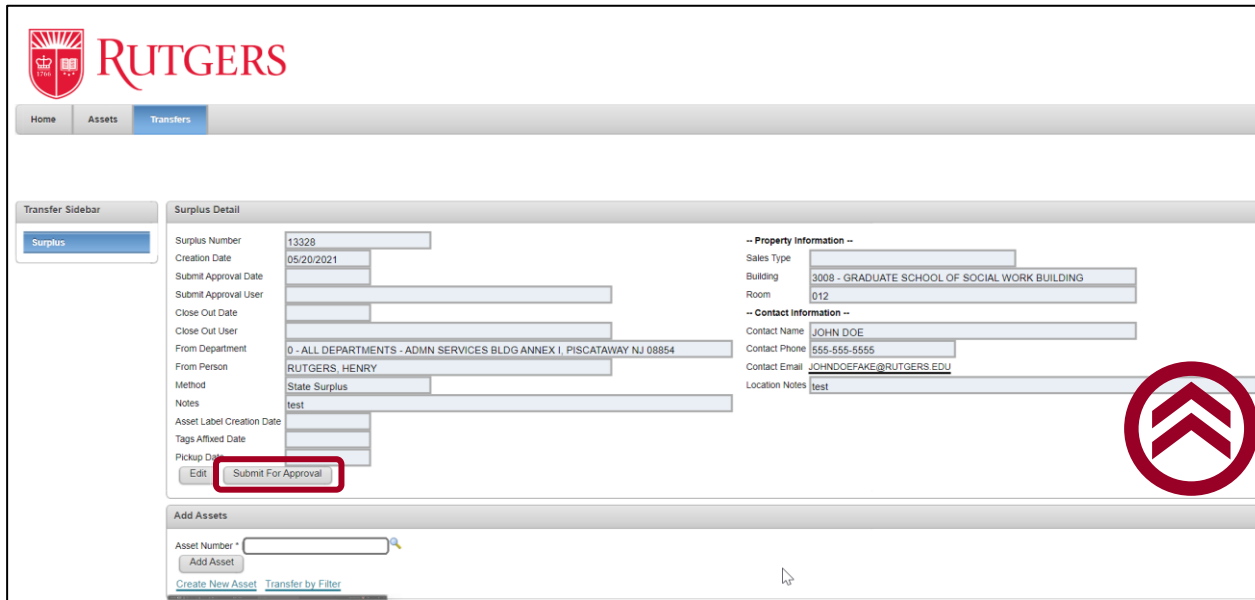


**HINT:** Click the edit icon  to edit an asset. Click the **Docs/Images** number to view, add, or edit images.



## Surplus Management

9. After reviewing all information for the Surplus Transfer request, scroll up and click **Submit for Approval**.



The screenshot displays the Rutgers Surplus Management web application. At the top left is the Rutgers logo. Below it is a navigation bar with 'Home', 'Assets', and 'Transfers' tabs. The main content area is titled 'Surplus Detail' and contains a form with the following fields:

Surplus Number	13328
Creation Date	05/20/2021
Submit Approval Date	
Submit Approval User	
Close Out Date	
Close Out User	
From Department	0 - ALL DEPARTMENTS - ADMN SERVICES BLDG ANNEX I, PISCATAWAY NJ 08854
From Person	RUTGERS, HENRY
Method	State Surplus
Notes	test
Asset Label Creation Date	
Tags Affixed Date	
Pickup Date	

Below the form are 'Edit' and 'Submit For Approval' buttons. The 'Submit For Approval' button is highlighted with a red box. To the right of the form is a 'Property Information' section with the following details:

Property Information	
Sales Type	
Building	3008 - GRADUATE SCHOOL OF SOCIAL WORK BUILDING
Room	012
Contact Information	
Contact Name	JOHN DOE
Contact Phone	555-555-5555
Contact Email	JOHNDOEFAKE@RUTGERS.EDU
Location Notes	test

At the bottom of the page is an 'Add Assets' section with an 'Asset Number' input field and an 'Add Asset' button. A red circular icon with a white arrow pointing up is overlaid on the right side of the screenshot.

10. After submitting, a notification email will be sent to the **Approver**.

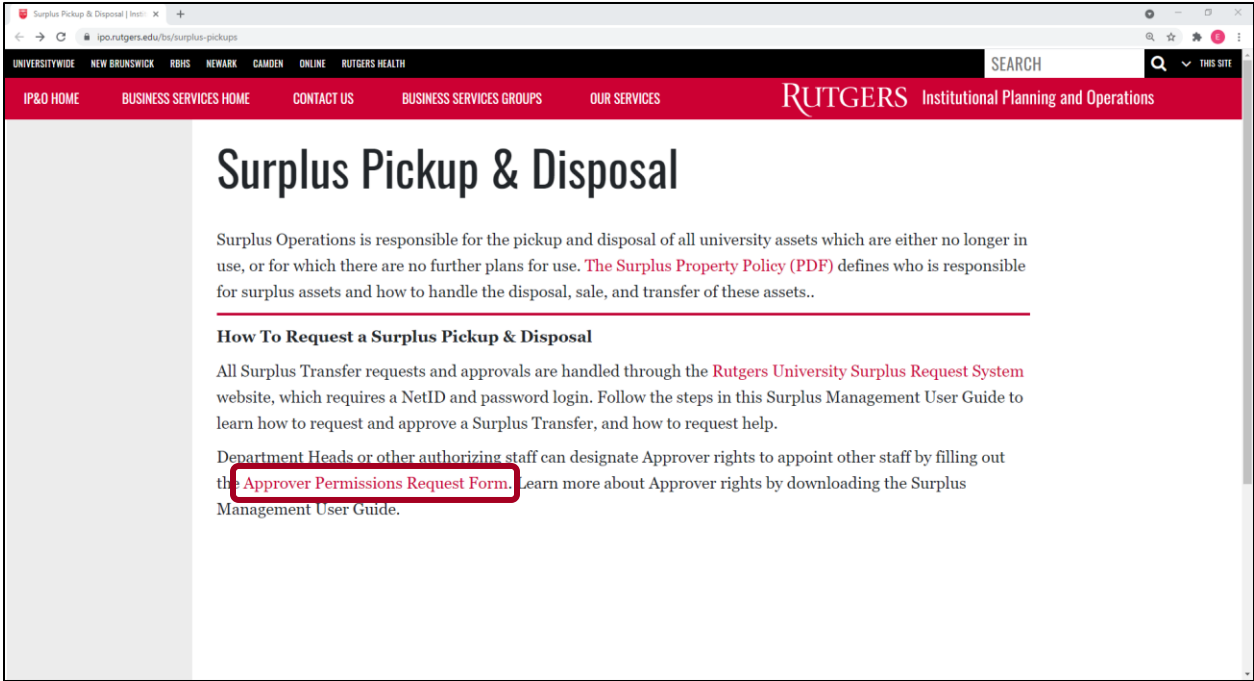
After the **Approver** reviews and approves the request, the Surplus Operations team will be notified that the transfer is ready.

# Requesting Approver Permissions



KEY: The steps to request **Approver** permissions for another person must be completed by a Department Head or authorized staff. It is the responsibility of the Department Head or authorized staff to [remove Approver-level permissions](#) when necessary.

1. Navigate to the <https://ipo.rutgers.edu/bs/surplus-pickups> webpage. Click the **Approver Permissions Request Form**.



## Surplus Management

2. Enter all required information.



**KEY:** For the question **Do you want to grant or remove Approver-level permissions in the Surplus Management System?** select **I want to grant Approver-level permissions.**

The screenshot shows the 'Approver Permissions Request Form' on the Rutgers website. The form includes the following fields and options:

- First Name:** \* (text input)
- Last Name:** \* (text input)
- NetID:** \* (text input)
- Email:** \* (text input)
- Are you a Department Head or Authorized Staff?** \*
  - Yes
  - No
- If **No**, please do not submit form and **contact** Surplus Management.
- Do you want to grant or remove Approver-level permissions in the Surplus Management System? \***
  - I want to grant Approver-level permissions for the individual below. (This option is highlighted with a red box in the original image.)
  - I want to remove Approver-level permissions for the individual below.
- Approver-level Permissions**
  - First Name:** \* (text input)

3. Click **Submit**.

The screenshot shows the bottom portion of the 'Approver Permissions Request Form'. The 'SUBMIT' button is highlighted with a red box. Below the form, there is a footer section with contact information and social media links.

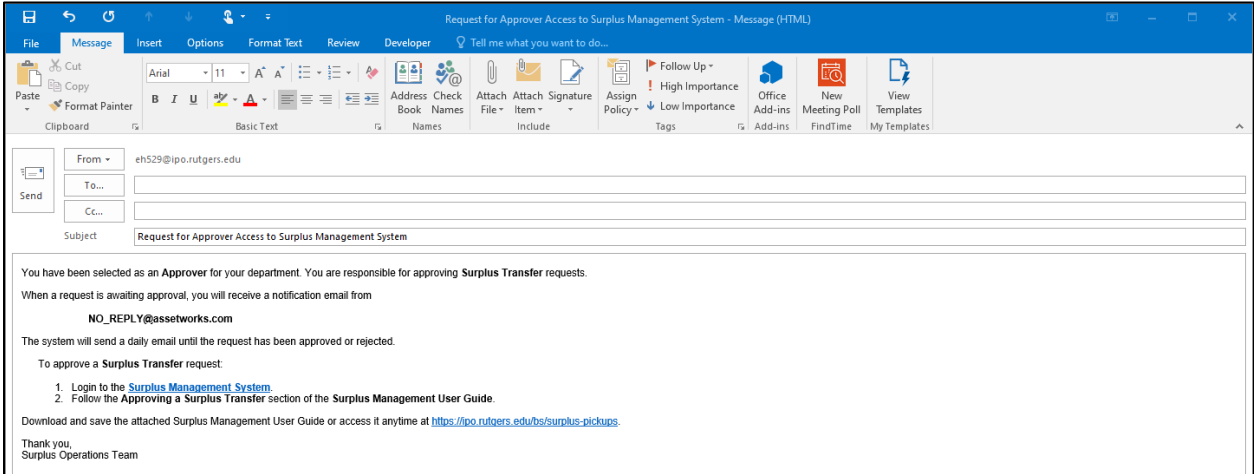
For general IP&O inquiries, please EMAIL US or call 848-445-3000.  
For group specific inquiries, click HERE.

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The Surplus Operations team will review the request. The request will be processed, provided the request has been properly filled out and sent from a Department Head or authorized staff.

The Surplus Operations team will send an email notification (sample below) of the change to the Department Head or authorized staff and the newly appointed **Approver**.

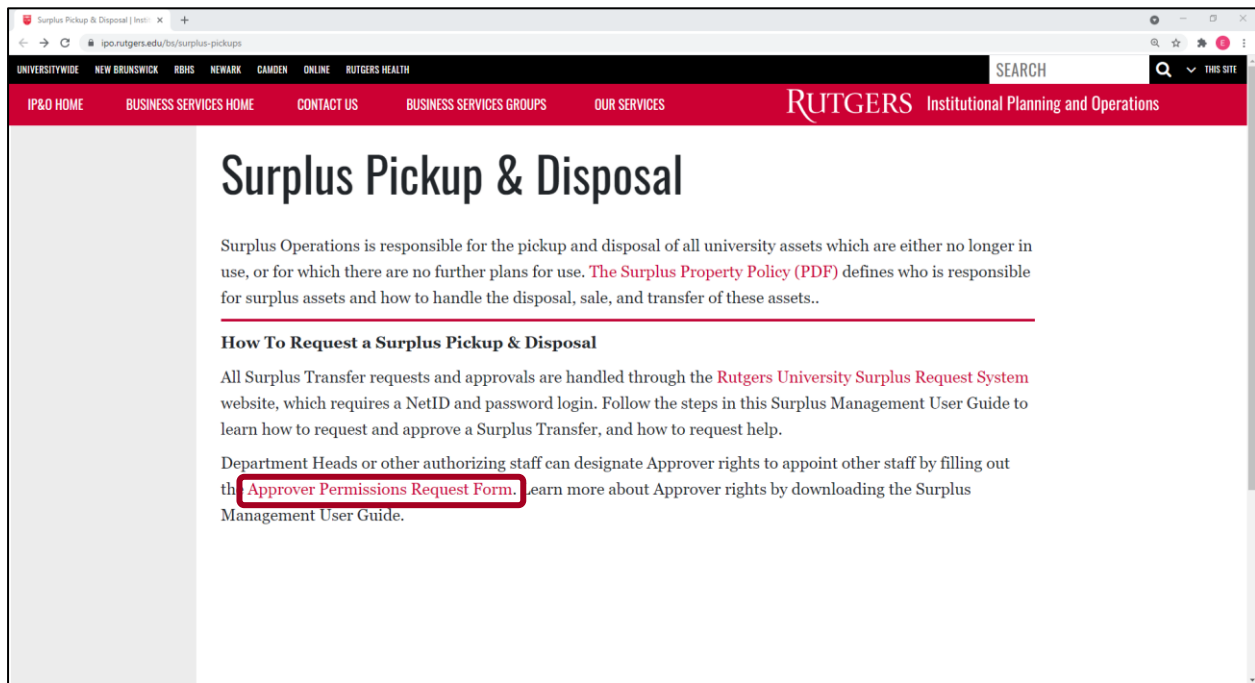


## Removing Approver Permissions



**KEY:** The steps to remove **Approver** permissions for another person must be completed by a Department Head or authorized staff. It is the responsibility of the Department Head or authorized staff to remove Approver-level permissions when necessary.

1. Navigate to the <https://ipo.rutgers.edu/bs/surplus-pickups> webpage. Click the **Approver Request Form**.





2. Enter all required information.



**KEY:** For the question **Do you want to grant or remove Approver-level permissions in the Surplus Management System?** select **I want to remove Approver-level permissions.**

The screenshot shows the 'Approver Permissions Request Form' on the Rutgers IP&O website. The form includes fields for First Name, Last Name, NetID, and Email. A question asks 'Are you a Department Head or Authorized Staff?' with 'Yes' and 'No' radio buttons. Below this, a question asks 'Do you want to grant or remove Approver-level permissions in the Surplus Management System?' with two radio button options. The second option, 'I want to remove Approver-level permissions for the individual below.', is highlighted with a red rectangular box. Below this question, there is a section for 'Approver-level Permissions' with a 'First Name' field.

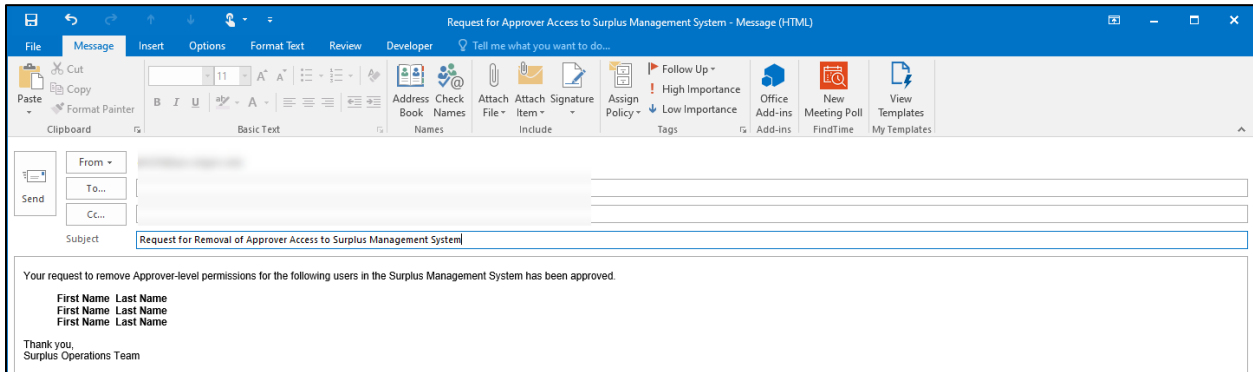
3. Click **Submit**.

This screenshot shows the bottom portion of the 'Approver Permissions Request Form'. It includes a text box with instructions: 'If granting permissions, this individual will be authorized to approve Surplus Transfers for the following department. If removing permissions, this individual will no longer be able to approve Surplus Transfers for the following department.' Below this are fields for 'Department', 'Organization ID', 'Address', and 'Phone Number'. A question asks 'Would You Like To Change The Permissions For Another Individual?' with 'Yes' and 'No' radio buttons. The 'SUBMIT' button is highlighted with a red rectangular box. The footer contains contact information for IP&O, social media icons for Facebook, Instagram, and Twitter, and a copyright notice for Rutgers University.

## Surplus Management

The Surplus Operations team will review the request. The request will be processed, provided the request has been properly filled out and sent from a Department Head or authorized staff.

The Surplus Operations team will send an email notification (sample below) of the change to the Department Head or authorized staff and the newly appointed **Approver**.

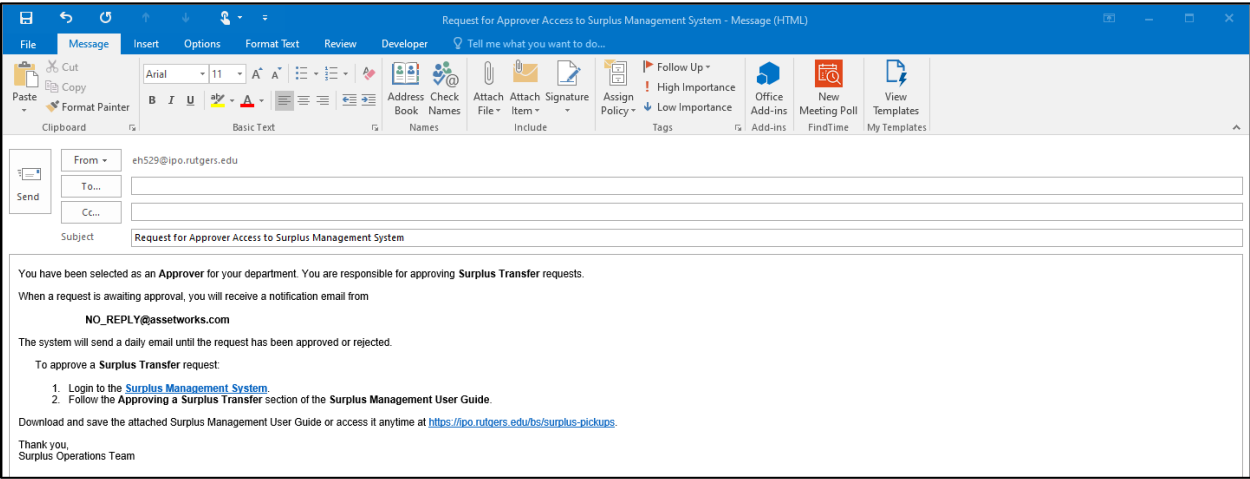


# Approving a Surplus Transfer Request

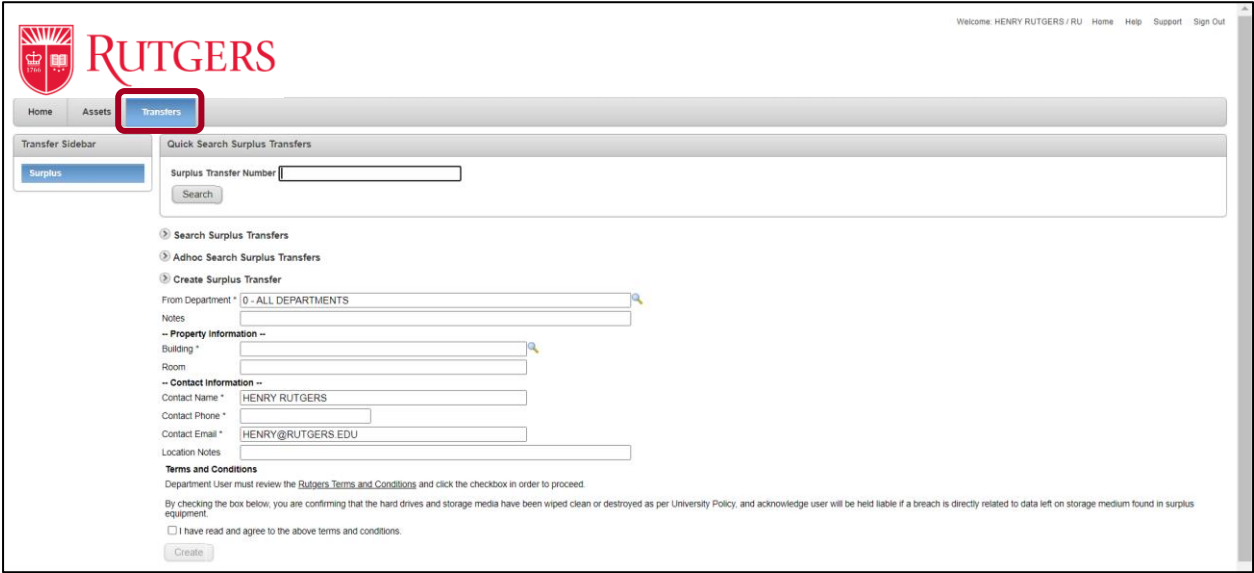


**KEY:** **Approvers** must have permissions granted by their Department Head or authorized staff and follow the steps outlined here to approve a Surplus Transfer.

1. After the **Requestor** clicks **Submit for Approval**, an email (sample below) is sent to all **Approvers** in the appropriate department.

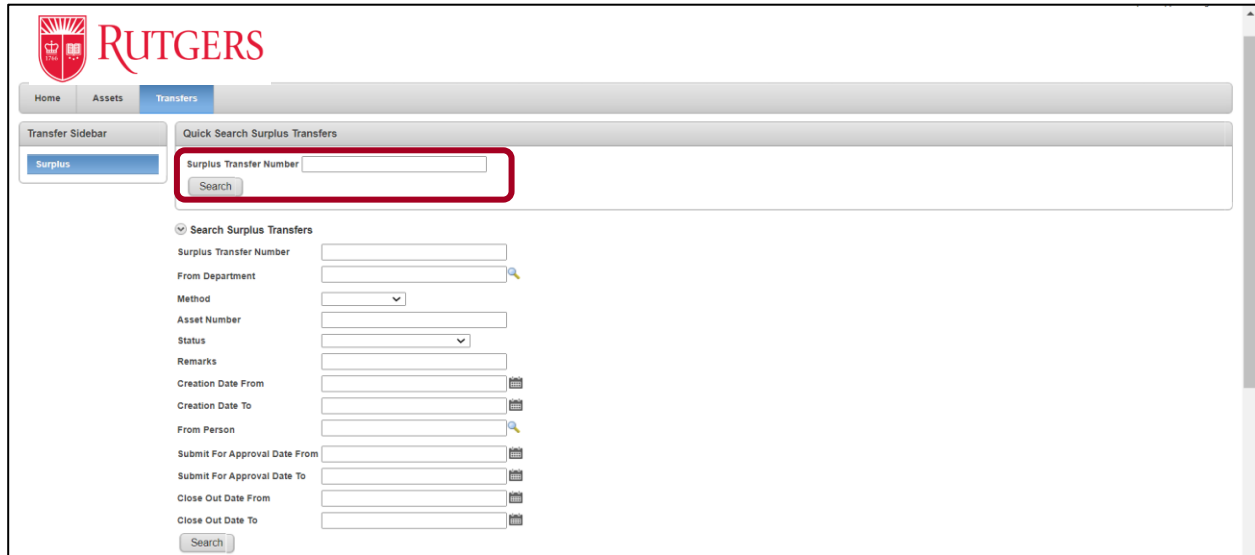


2. Access the [Surplus Management System](#). Click the **Transfers** tab.



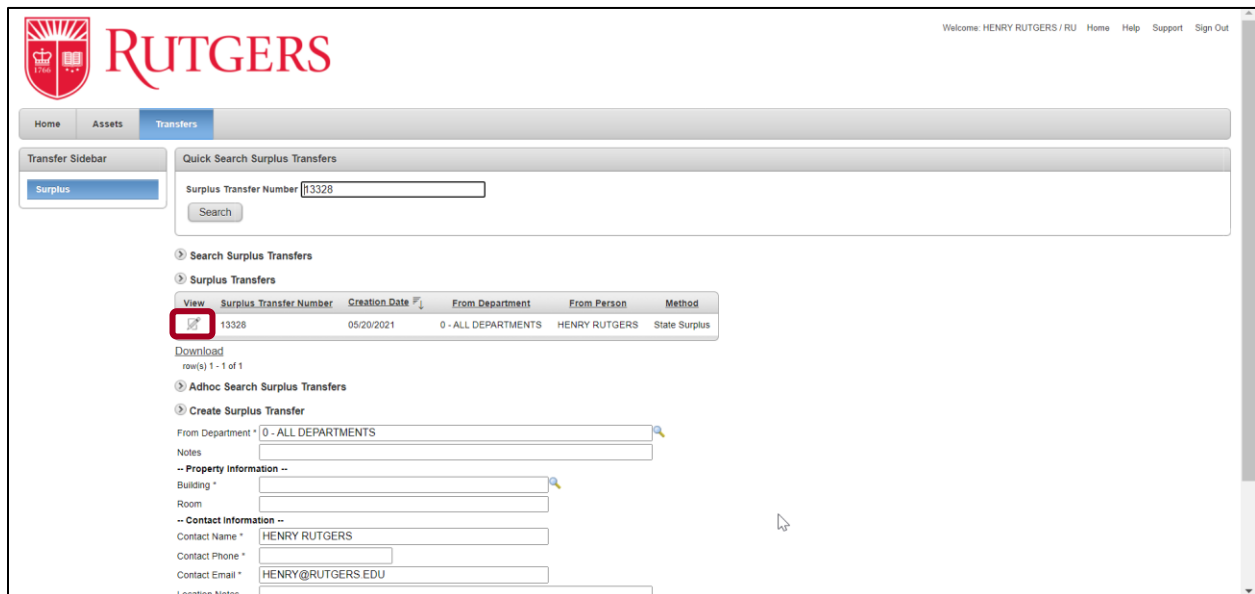
## Surplus Management

3. Enter the **Surplus Transfer Number** (also known as the **Surplus Number**).  
Click **Search**.



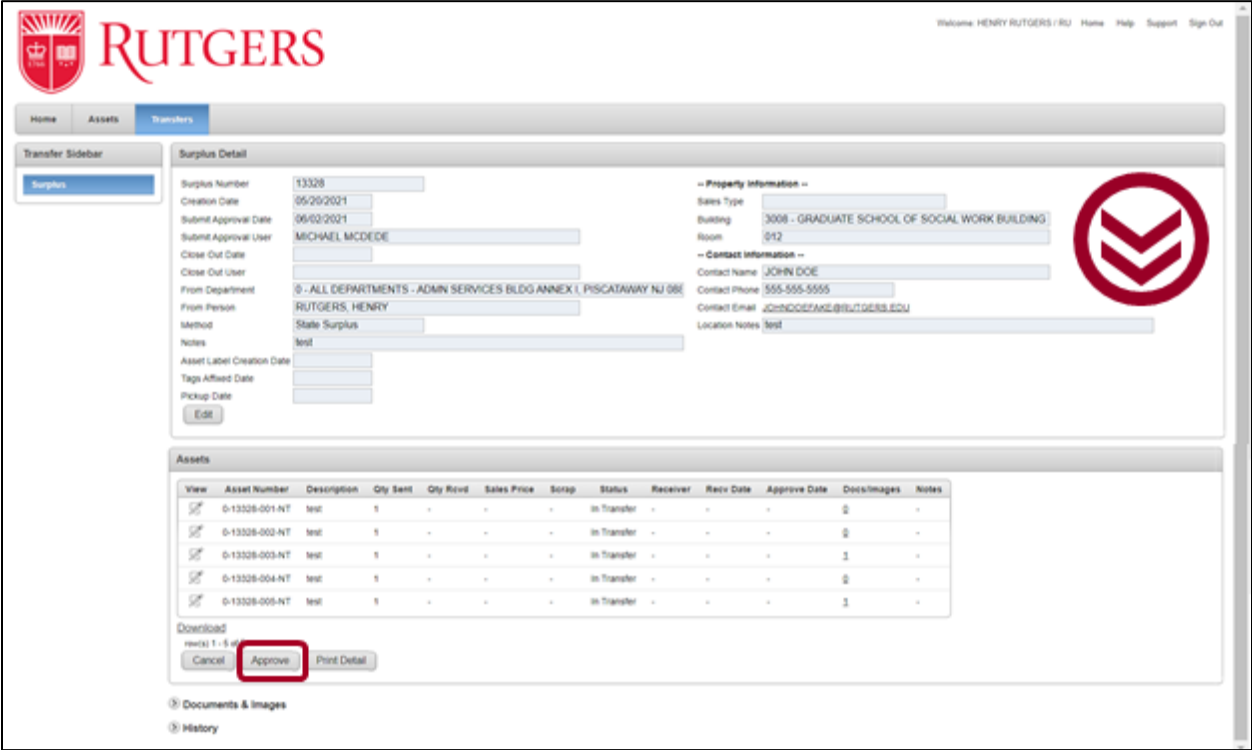
The screenshot shows the Rutgers Surplus Management web application. At the top left is the Rutgers logo. Below it are navigation tabs for Home, Assets, and Transfers. A sidebar on the left is titled "Transfer Sidebar" and has a "Surplus" button. The main content area is titled "Quick Search Surplus Transfers" and contains a search form. The "Surplus Transfer Number" field is highlighted with a red box, and the "Search" button is also highlighted. Below the search form is a section titled "Search Surplus Transfers" with various filters: Surplus Transfer Number, From Department, Method, Asset Number, Status, Remarks, Creation Date From, Creation Date To, From Person, Submit For Approval Date From, Submit For Approval Date To, Close Out Date From, and Close Out Date To. Each filter has a corresponding input field or dropdown menu.

4. Click the edit icon  for the appropriate transfer.

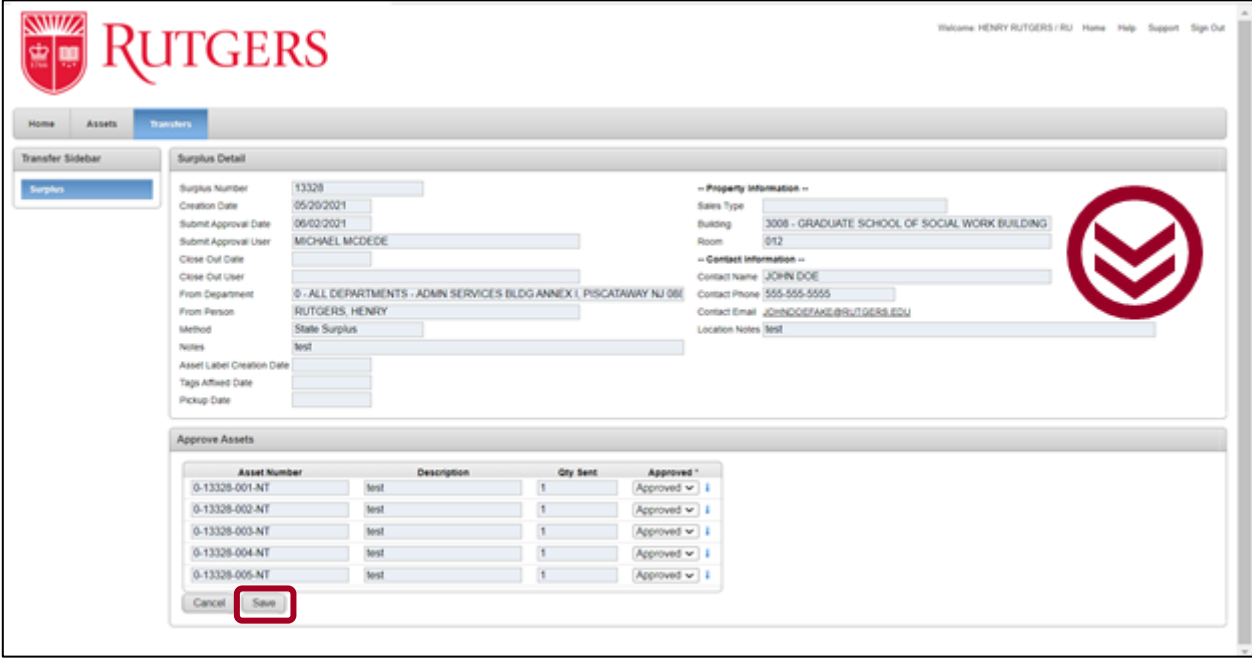


The screenshot shows the Rutgers Surplus Management web application with search results. The "Surplus Transfer Number" field in the search form now contains the value "13328". Below the search form is a section titled "Search Surplus Transfers" with a sub-section "Surplus Transfers". A table displays the search results with columns: View, Surplus Transfer Number, Creation Date, From Department, From Person, and Method. The first row shows the transfer number 13328, creation date 05/20/2021, from department 0 - ALL DEPARTMENTS, from person HENRY RUTGERS, and method State Surplus. The "View" column for this row contains an edit icon, which is highlighted with a red box. Below the table is a "Download" section with "row(s) 1 - 1 of 1". Below that is a section titled "Adhoc Search Surplus Transfers" and "Create Surplus Transfer". The "Create Surplus Transfer" section has a "From Department" dropdown set to "0 - ALL DEPARTMENTS", a "Notes" field, and sections for "Property Information" (Building, Room) and "Contact Information" (Contact Name, Contact Phone, Contact Email). The "Contact Name" field is filled with "HENRY RUTGERS" and the "Contact Email" field is filled with "HENRY@RUTGERS.EDU".

5. Click **Approve**. Scroll down if the **Approve** button is not visible.

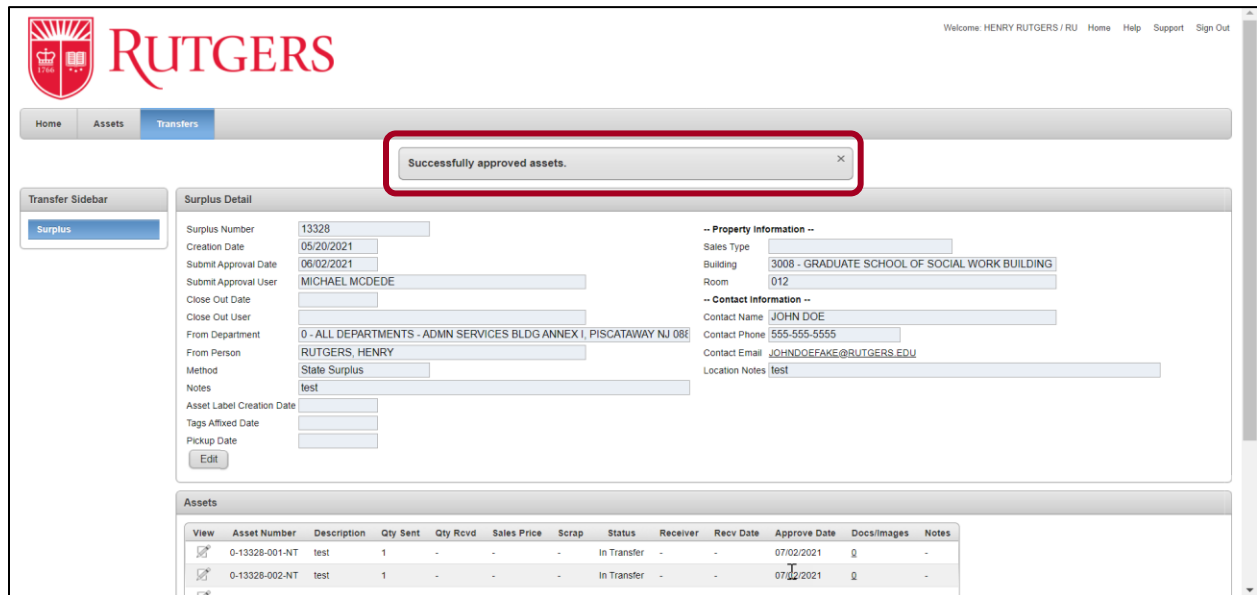


6. Click **Save**. Scroll down if the **Save** button is not visible.



# Surplus Management

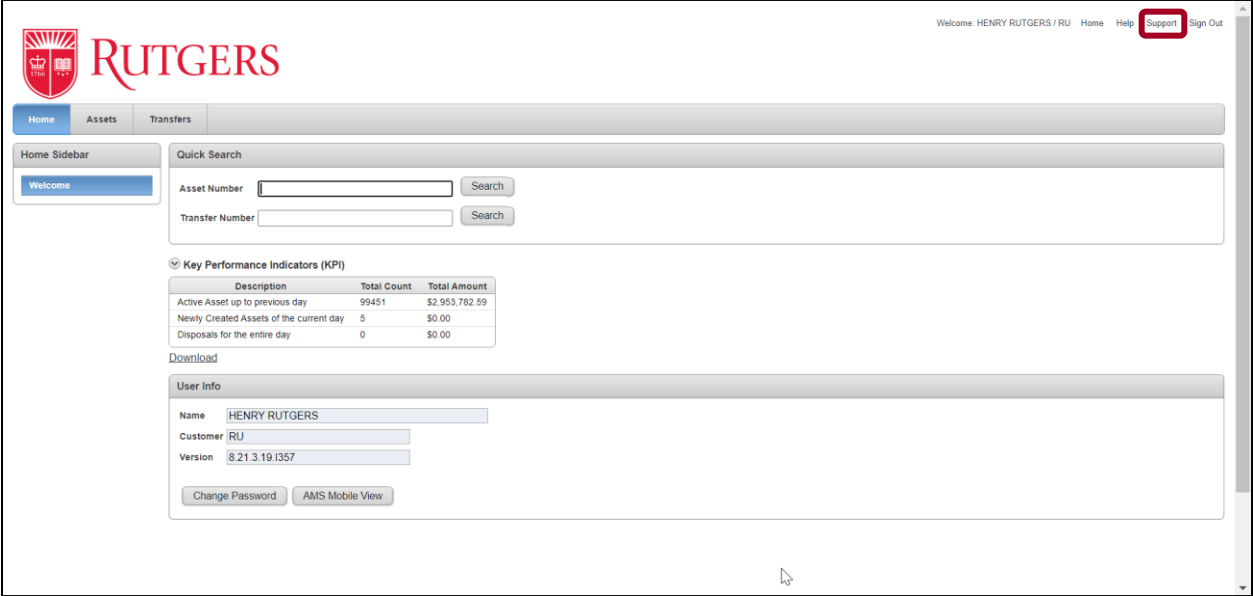
7. The page will refresh and a success notification will appear.



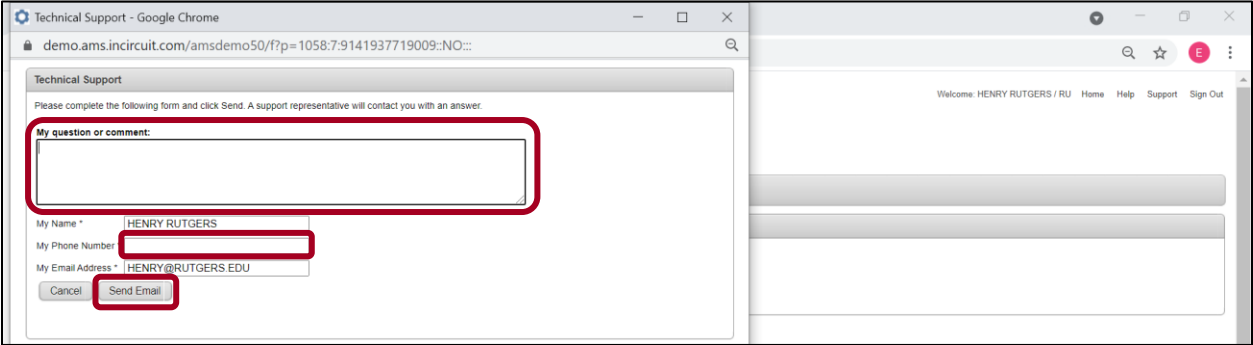
8. A member of the Surplus Operations team will email the **Requestor** to schedule a date and time for the pickup of the **Surplus Transfer**.

# Requesting Support

- 1. Access the [Surplus Management System](#). In the top right corner, click **Support**.



- 2. A pop-up tab will appear with some pre-filled information. Enter **My questions or comments:** and **My Phone Number**. Click **Send Email**.



- 3. An email will be sent to a Rutgers Surplus Management System Administrator and AssetWorks Support.

When the issue is resolved, you will receive an email from a **Rutgers Surplus Management System Administrator**.





