

SURPLUS PROPERTY SOFTWARE MANAGER ROLE

Overview

The user guide provides an overview of the process of the Manager role in the Surplus Property Software system. The Manager role in the Surplus Property Software oversees their department, the people with roles in the department, and their addresses/locations related to Surplus. Managers can add and make changes to users, other managers, department addresses, close out Disposal Requests (DRs), and add departments. This user guide includes the functionality of the Department Profile page and provides information on the fields and screen prints to assist with managing departmental addresses, users, and managers. Please note, departments will need approvers. Approvers need to be approved by the SFO and submitted to the Service Desk to add this role. The intended audiences include all department managers of the current version of Surplus Property Software and all new managers to the Surplus system.



<https://surplusproperty.osu.edu/>

Logging In



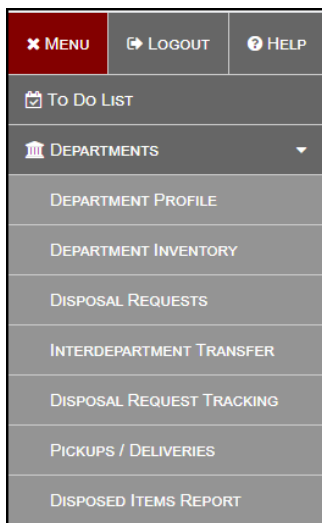
If a user has access to more than one department, he or she will need to select a department upon login into Surplus Property Software. Use the dropdown menu to select Department, then select **Continue**.

Please Select Department

Department

SPMS Training Department

Back to Login Continue



1. In the top, right corner of the application, select **Menu**
2. Select **Departments** to open that section.



Disposal Request Tracking, Pickups/Deliveries, and Disposed Items Report may be helpful for planning and reporting.



3. Select Department Profile.

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SURPLUS PROPERTY SOFTWARE

WELCOME, MINDY SWANNER
LOGGED IN AS MANAGER FOR
SPMS TRAINING DEPARTMENT

DEPARTMENTS: DEPARTMENT PROFILE

SEARCH DEPARTMENT USERS

A	Dept#	Department Name	Phone	Address	
✓	00060	SPMS Training Department	(614) 292-8733	Blankenship Hall #0360, 901 Woody Hayes Dr	
✓	51188	Surplus Department	(614) 688-3545	Surplus Warehouse #0381, 2650 Kenny Rd	

Total Records: 2

New Department Alt+N Print

Select **Edit** in the department line to make updates.

SURPLUS PROPERTY SOFTWARE MANAGER ROLE

Update Access

Select the **Users** tab and the access for that department will populate. From here a manager can add users or edit users. Managers cannot delete users. The Service Desk is required to delete users.

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WELCOME, MINDY SWANNER
LOGGED IN AS MANAGER FOR
SPMS TRAINING DEPARTMENT

MENU LOGOUT HELP

DEPARTMENTS: DEPARTMENT PROFILE

SEARCH DEPARTMENT **USERS**

SPMS Training Department

A	Individual Name	Title	Security Level	Phone	E	
✓	Chris Anderson	IT Admin	Manager	(614) 555-1212	✉	✎
✗	Test Driver	Driver	User	(614) 688-3545	✉	✎
✗	Mike Runyan	Local Apps	User	(614) 247-4387	✉	✎
✗	Travis Stone	Manager	Manager	(614) 292-2900	✉	✎
✓	Mindy Swanner	Superhero	Manager	(614) 292-8791	✉	✎
✓	Michael Swick	Manager	Administrator	(614) 292-9738	✉	
✓	Patricia Tripp	BFAP IT	Manager	(614) 292-4683	✉	✎
✗	Test User	tester	User	(614) 555-1212	✉	✎
✗	test2 user	tester	User	(614) 555-1212	✉	✎
✗	Test3 User	Swanner	User	(614) 292-8791	✉	✎

« ‹ 1 › » Total Records: 11

New User **C** Alt+N

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- A. **Security Level** – the current security level for each member of the department. Users can enter Disposal Requests. Managers can add individuals.
- B. **Edit button**– Edit an individual
- C. **New User** – add a Surplus user for this department

SURPLUS PROPERTY SOFTWARE MANAGER ROLE

New User or Manager

After selecting New User on the Users tab, this window will populate to add a new user.

- A. **Assign Existing User** – If the user is already in the Surplus system for another department, use this option to search for the user. You will not be able to add a new user with if the email is already in the system
- B. **Notes** – Add a note if needed
- C. **First Name** – Enter the individual's first name
- D. **Last Name** – Enter the individual's last name
- E. **Job Title** – Enter the individual's job title
- F. **Email** – Enter the individual's work email
- G. **Security Level** – Select security level of User or Manager. Note, it defaults to Manager, but Manager should only be selected if the individual needs to manage the department
- H. **Phones** – **Add New** – Select Add New to add a new Phone number. A small Phone Box will populate (K). Enter the work number without any dashes and select the Main checkbox then Save
- I. **Authorized to approve Disposal Requests** – will populate automatically with a green check if the individual is an approver or a red check if they are not an approver. Approvers are not dictated from this form and must be requested. First create the user then submit the SFO approved form for approval access to the Service Desk
- J. **Save** – save the new user or manager

The screenshot shows the 'DEPARTMENT USER' form with the following elements:

- Assign Existing User:** A dropdown menu with a search icon (A).
- Notes:** A text area with a plus icon (B).
- First Name:** Text input field (C).
- Last Name:** Text input field (D).
- Job Title:** Text input field (E).
- Email:** Text input field (F).
- Security Level:** Dropdown menu with 'Manager' selected (G).
- Phones:** Section with an 'Add New' button (H).
- Authorized to approve Disposal Requests:** A checkbox area (I).
- Save/Cancel:** Buttons at the bottom (J).

The 'PHONE' modal window is open, showing:

- Phone Number:** Input field with '614' (K).
- Ext.:** Input field.
- Phone Type:** Dropdown menu with 'Phone' selected.
- Main:** Checkbox.
- Save/Cancel:** Buttons at the bottom.

Edit User or Manager

After selecting the Edit button on

- A. **Notes** – Add a note if needed
- B. **First Name** – First name can be changed
- C. **Last Name** – Last name can be changed
- D. **Job Title** – Can be updated
- E. **Email** – Can be corrected
- F. **Security Level** – can be changed. The Manager security should only be selected if the individual needs to add users
- G. **Phone** – Edit button – update phone number
- H. **Authorized to approve Disposal Requests** – will populate automatically. Approvers are not dictated from this form and must be requested. First create the user then submit the SFO approved form for approval access to the Service Desk
- I. **Save** – save changes

The screenshot shows the 'DEPARTMENT USER' form with the following elements:

- Assign Existing User:** A dropdown menu with 'Select:' (A).
- Notes:** A text area with a plus icon (A).
- First Name:** Text input field with 'Mindy' (B).
- Last Name:** Text input field with 'Swanner' (C).
- Job Title:** Text input field with 'Tester' (D).
- Email:** Text input field with 'swanner.4@osu.edu' (E).
- Security Level:** Dropdown menu with 'User' selected (F).
- Phones:** Section with an 'Add New' button and a list of phone numbers. One phone number '(614) 292-5555' is shown with a green checkmark (G).
- Authorized to approve Disposal Requests:** A checkbox area with a red 'X' (H).
- Save/Cancel:** Buttons at the bottom (I).

The 'PHONE' modal window is open, showing:

- Phone Number:** Input field with '614' (K).
- Ext.:** Input field.
- Phone Type:** Dropdown menu with 'Phone' selected.
- Main:** Checkbox.
- Save/Cancel:** Buttons at the bottom.

SURPLUS PROPERTY SOFTWARE MANAGER ROLE

Update Address

To make changes to addresses, follow the steps on page one and select the **Department** tab. From here a manager can add, change, or delete addresses. These addresses are the options that users will see in their dropdown when making a surplus request. Managers should keep their addresses updated.

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SPMS TRAINING DEPARTMENT

MENU LOGOUT HELP

DEPARTMENTS: DEPARTMENT PROFILE

SEARCH DEPARTMENT USERS

Notes: Approved: ✓

Dept#	Department Name	Short Name	Parent Department
00060	SPMS Training Department	SPMS	Business and Finance CCH6-00050-Business and Fi

Addresses

Blankenship Hall #0360 , 901 Woody Hayes Dr , Columbus OH, 43210

Cunz #1234 , 2313124 , Columbus OH, 43210

Phones

(614) 292-8733 Dept. Main Phone

Distribution Accounts

debit 00000-00000-000000----

64416-00060-011000----

New Department Save Cancel Delete Print

- A. **Notes** – Managers can add notes about their addresses or department
- B. **Add New** button for Addresses – Add a new address
- C. **Edit** button for Addresses – Edit any current addresses
- D. **Delete** button for Addresses – Delete any current addresses
- E. **Add New button for Phones** – add a phone number for the department
- F. **Edit** button for Phones – Edit any current phone number
- G. **Delete** button for Phones – Delete any current phone number

New Address

After selecting Add New on the Addresses section of the Department tab, this window will populate to add a new address.

- A. **Bldg #** – Enter building number
- B. **Building Name** – Enter building name
- C. **Street Address** – Enter street address
- D. **P.O. Box** – Enter P.O. Box if applicable
- E. **City** – Enter city
- F. **State** – Defaults to OH
- G. **Zip** – Enter first five numbers of the zip code
- H. **+4** – Enter the last 4 of the zip code if known
- I. **Main** – select checkbox if this address is the department's main address
- J. **Save** – save the new address

ADDRESS

Bldg # Building Name Street Address

P.O.Box City State Zip +4 Main

Save Cancel

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Edit Address

After selecting Edit on an address line on the Department tab, this window will populate to edit the address.

- A. **Bldg #** – Enter or update the building number
- B. **Building Name** – Enter or update the building name
- C. **Street Address** – Enter or update the street address
- D. **P.O. Box** – Enter or update the P.O. Box if applicable
- E. **City** – Enter or update the city
- F. **State** – Defaults to OH
- G. **Zip** – Enter or update the first five numbers of the zip code
- H. **+4** – Enter or update the last 4 of the zip code if known
- I. **Main** – select the checkbox if this address is the department’s main address. Select again to unselect
- J. **Save** – save the edits to the address

The screenshot shows a form titled 'ADDRESS' with the following fields and buttons:

- Bldg #** (A): Input field containing '0360'.
- Building Name** (B): Input field containing 'Blankenship Hall'.
- Street Address** (C): Input field containing '901 Woody Hayes Dr'.
- P.O.Box** (D): Input field (empty).
- City** (E): Input field containing 'Columbus'.
- State** (F): Input field containing 'OH'.
- Zip** (G): Input field containing '43210'.
- +4** (H): Input field (empty).
- Main** (I): A checked checkbox.
- Save** (J): A grey button.
- Cancel**: A white button.

Delete Address

Select Delete on an address line on the Department tab.

The screenshot shows the 'DEPARTMENTS: DEPARTMENT PROFILE' page. The 'Addresses' section is expanded, showing a list of addresses. The first address is highlighted in yellow and has a red box around the delete icon (trash can) in the right-hand column. The address is: 'Blankenship Hall #0360, 901 Woody Hayes Dr, Columbus OH, 43210'. Below the addresses section are sections for 'Phones' and 'Distribution Accounts'. At the bottom of the page are buttons for 'New Department', 'Save', 'Cancel', 'Delete', and 'Print'.

Then select OK to complete the deletion.

The screenshot shows a confirmation dialog box with the text: 'surplusv2.dev.osu.edu says Are you sure you want to delete?'. There are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red box.

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Add Department

If one of your departments is not in Surplus and it needs to be to transfer an item or surplus an item, open the Surplus Property Software and select **Menu**, then **Departments**, then **Department Profile**. Either the Search tab or the Department tab has the New Department button.

The screenshot shows the 'DEPARTMENTS: DEPARTMENT PROFILE' page. At the top, there is a navigation bar with 'SEARCH', 'DEPARTMENT', and 'USERS' tabs. Below this is a table with columns: Dept#, Department Name, Phone, and Address. Two departments are listed: SPMS Training Department and Surplus Department. At the bottom of the table, there is a 'New Department' button with an 'Alt+N' shortcut, which is highlighted with a red box. Other buttons include 'Print' and 'Total Records: 2'.

Complete the New Department Department Profile.

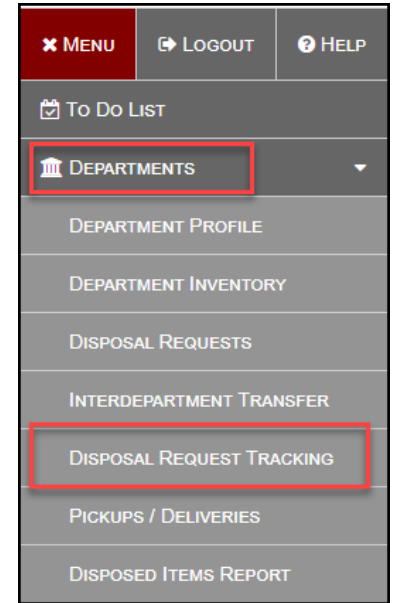
The screenshot shows the 'New Department Department Profile' form. The form has several sections: 'Notes' (A), 'Dept#' (B), 'Department Name' (C), 'Short Name' (D), 'Parent Department' (E), 'Addresses' (F), 'Phones' (G), and 'Distribution Accounts' (H). At the bottom, there is a 'New Department' button (Alt+N), a 'Save' button (I), and 'Cancel', 'Delete', and 'Print' buttons. The 'Save' button is highlighted in red.

- A. **Notes** – add a note on the department, if needed
- B. **Dept#** – Enter the cost center number
- C. **Department Name** – enter the cost center name
- D. **Short Name**– Enter the typical name for the department
- E. **Parent Department** – Enter the CCH6 (Cost Center Hierarchy 6) department for the cost center
- F. **Addresses Add New** – Add the department address
- G. **Phones Add New** – Add the department contact phone number
- H. **Distribution Accounts** –enter all 0s
- I. **Save** – Save department

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Close a Disposal Request

When the Disposal Request has been completed, the manager should close the Disposal Request (DR), the final step to complete a DR. This will help keep your reports clean when the DR has been completed. From the **Menu**, open **Departments** and select **Disposal Request Tracking**.



The Disposal Request Tracking page opens. From here you see the status of all DRs for your department.

- A. **Status** – View the Status of all DRs. DRs can be sorted by status.
- B. **Notes** – will populate for any DR with a note
- C. **Print** – To view details, save as a PDF, or print
- D. **Close** – After the DR is complete, close it out. Select the X

The screenshot shows the 'DISPOSAL REQUEST TRACKING' page for 'SPMS Training Department #00060'. It features a table with columns: Disposal Type, DR#, Date, Contact Person, Authorized by, Status, and a filter icon. A blue notification bar at the top of the table reads: 'Please mark the Disposal Requests as Closed once all items have been received by Surplus Property Office'. Callouts A, B, C, and D are placed on the table: A points to the Status column, B points to a 'Completed' status cell, C points to a 'Print' icon, and D points to an 'X' icon in the first column.

C	Disposal Type	DR#	Date	Contact Person	Authorized by	Status	Filter
	Turn into Surplus	32924	11/02/2020	Erik Vargo	Test User	In Progress	Print
	Turn into Surplus	32923	11/02/2020	Erik Vargo	Test User	In Progress	Print
X	Turn into Surplus	32922	10/12/2020	Chris Anderson	Erik Vargo	Completed	Print
	Turn into Surplus	32921	10/12/2020	Chris Anderson	Erik Vargo	In Progress	Print
X	Turn into Surplus	30595	06/05/2019	Chris Anderson	Erik Vargo	Completed	Print
	Turn into Surplus	30591	06/05/2019	Erik Vargo	Chris Anderson	In Progress	Print
	Turn into Surplus	30590	06/05/2019	Chris Anderson	Patricia Tripp	In Progress	Print
	Turn into Surplus	23374	08/19/2016	Connie Gargani	Michael Swick	Closed	Print
X	Turn into Surplus	23372	08/19/2016	Connie Gargani	Michael Swick	Completed	Print
X	Turn into Surplus	23371	08/19/2016	Connie Gargani	Michael Swick	Completed	Print

Total Records: 10
Print

A verification will pop up. Select OK to close out the DR.

