SURPLUS PROPERTY SOFTWARE MANAGER ROLE

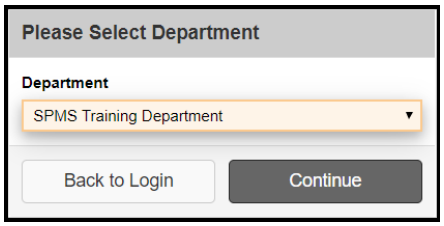
Overview

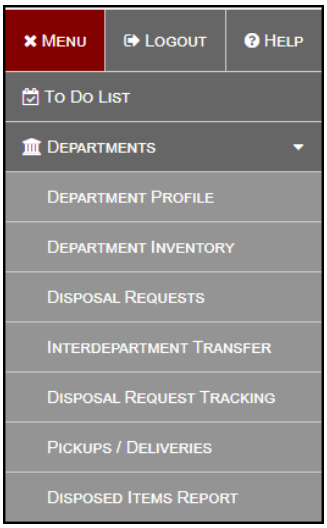
The user guide provides an overview of the process of the Manager role in the Surplus Property Software system. The Manager role in the Surplus Property Software oversees their department, the people with roles in the department, and their addresses/locations related to Surplus. Managers can add and 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 loggin into Surplus Property Software. Use the dropdown menu to select Department, then select **Continue**.

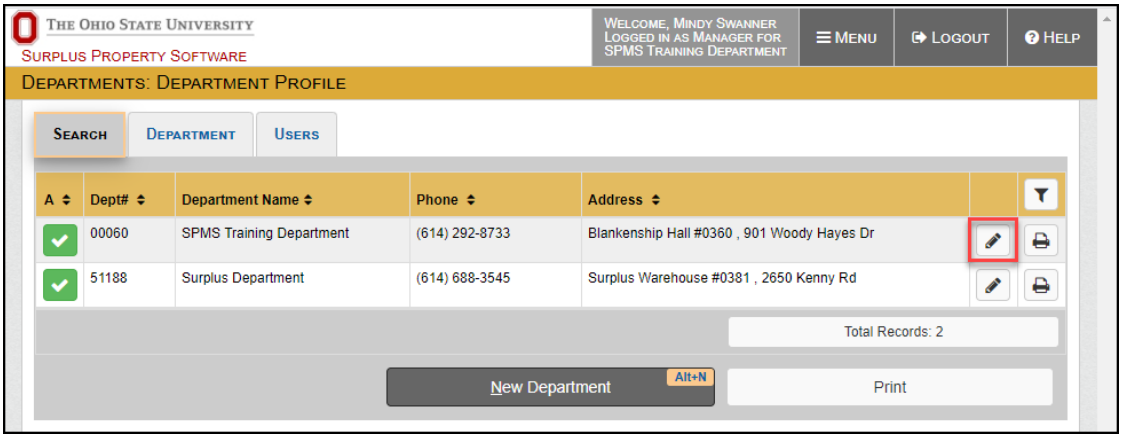




1. In the top, right corner of the application, select **Menu**
2. Select **Departments** to open that section.

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

3. Select Department Profile.



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

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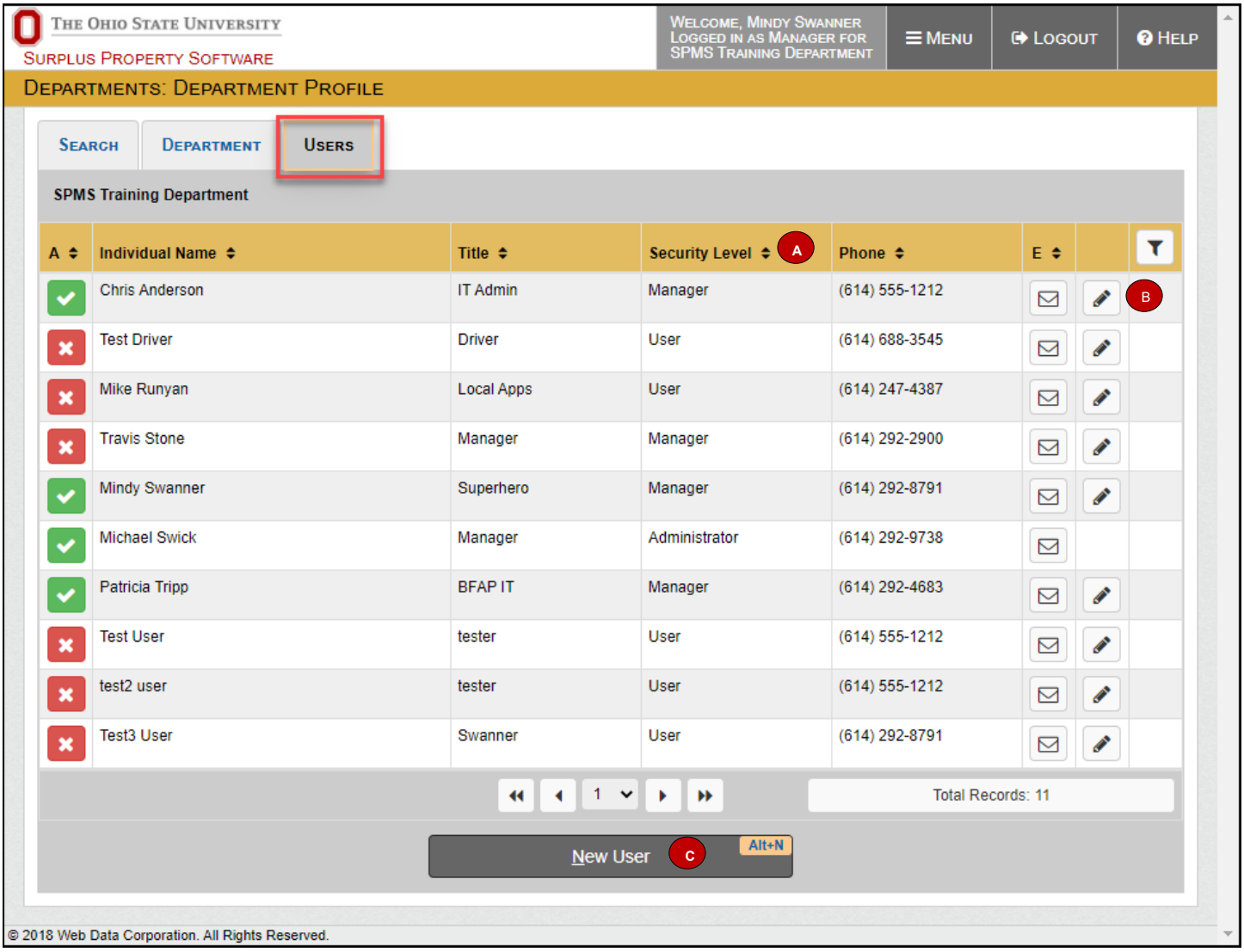
Update Access

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.



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

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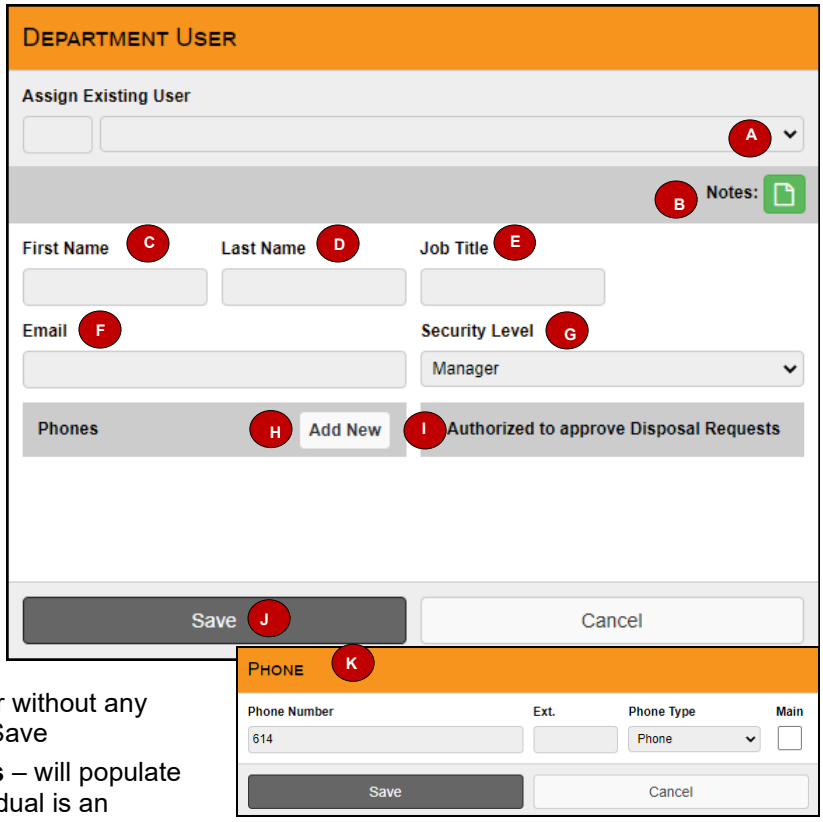
New User or Manager

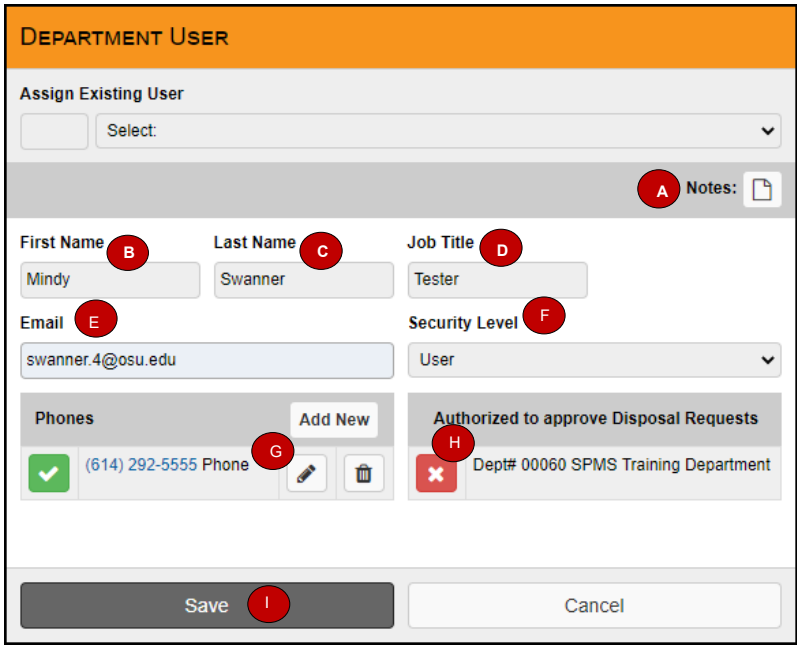
After selecting New User on the Users tab, this window will populate to add a new user.



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

Edit User or Manager

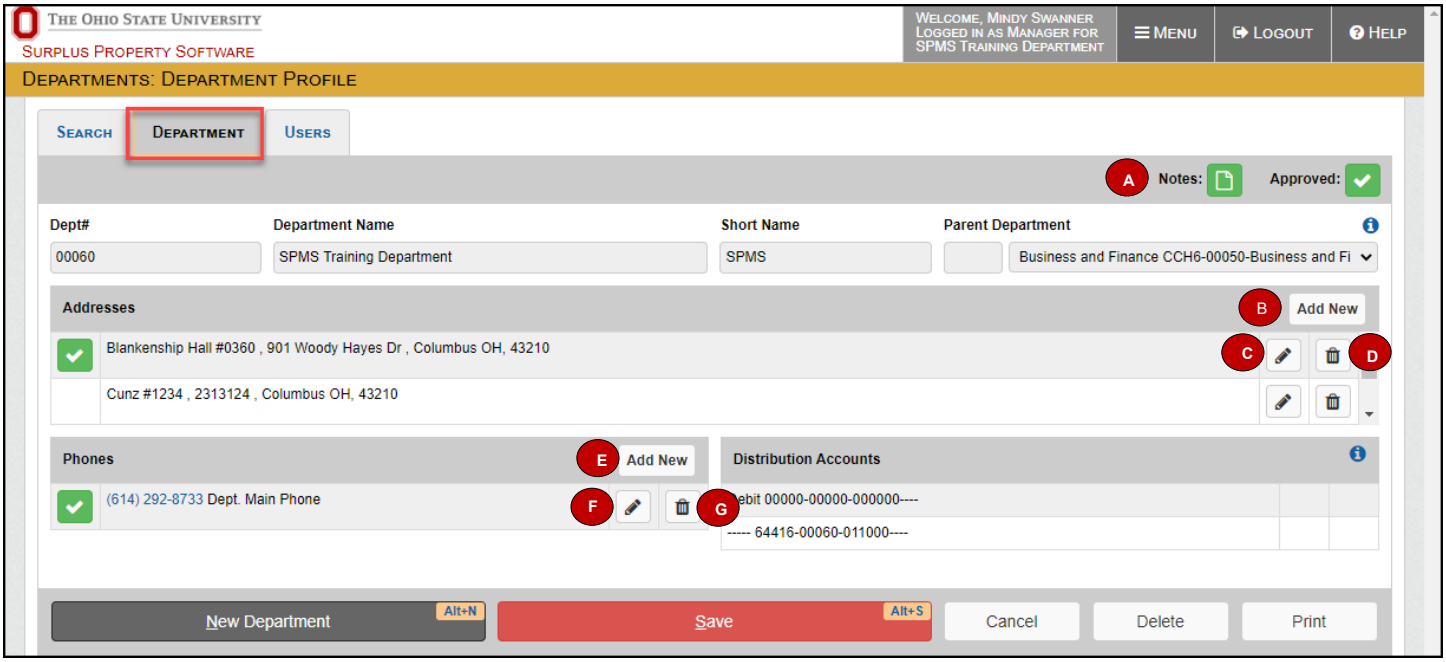
After selecting the Edit button on



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

Update Address

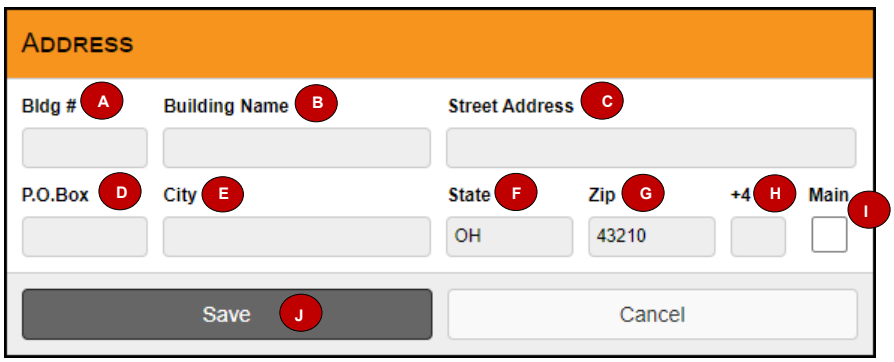
To make changes to addresses, follow the steps on page one and select the **Department** tab. From here a manager can add, change, or delete addresses. These addresses are the options that users will see in their dropdown when making a surplus request. Managers should keep their addresses updated.



A. **Notes** – Managers can add notes about their addressses or department
B. **Add New** button for Addresses – Add a new address
C. **Edit** button for Addresses – Edit any current addresss
D. **Delete** button for Addresses – Delete any current addresss
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

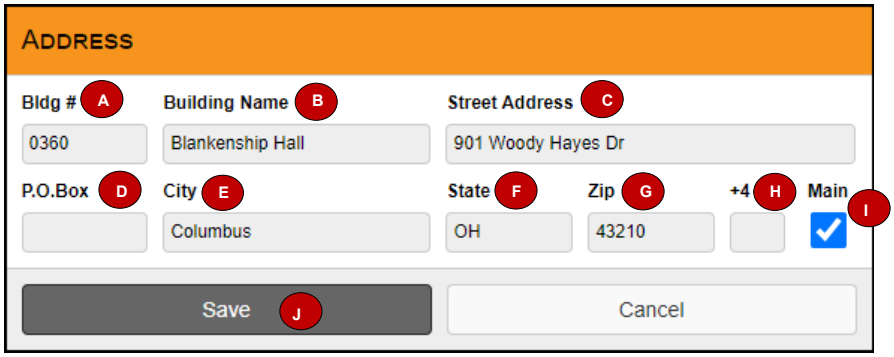
After selecting Add New on the Addresses section of the Department tab, this window will populate to add a new address.



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

Edit Address

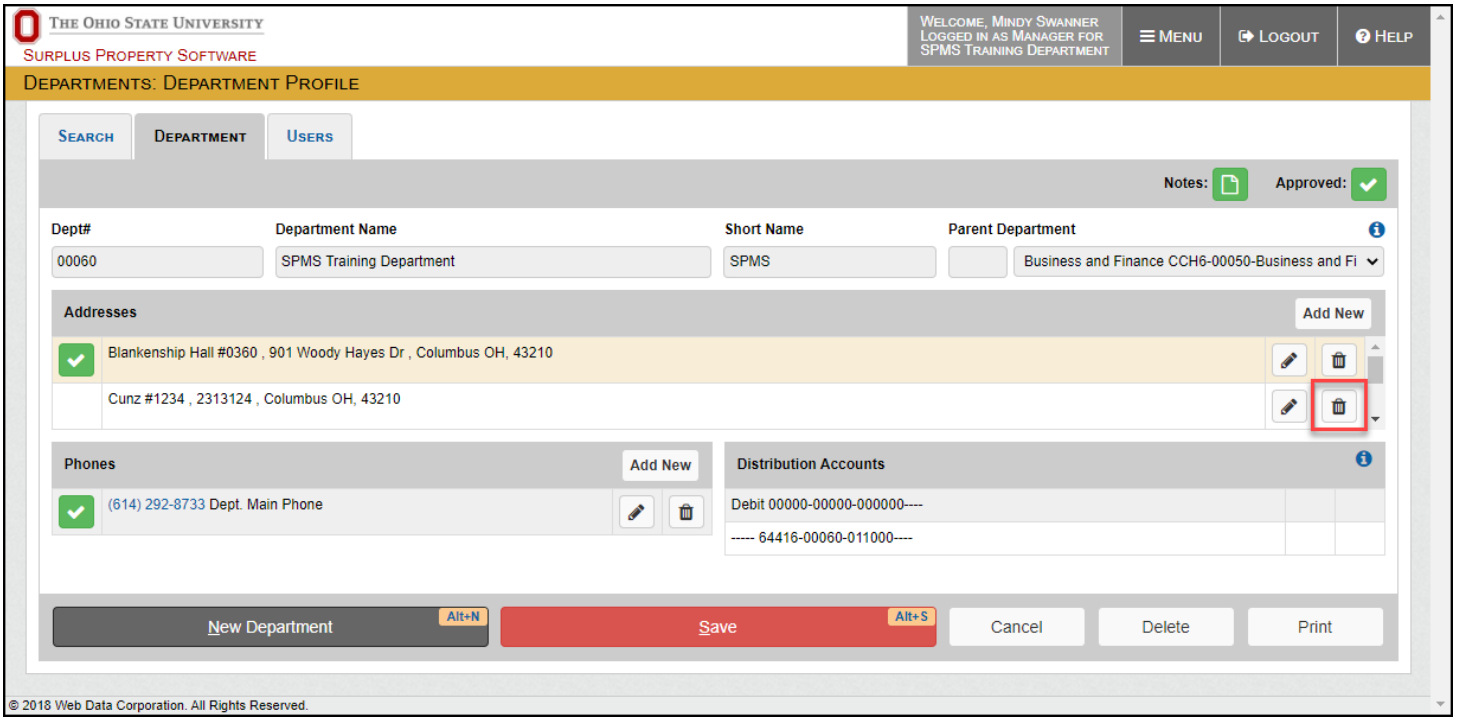
After selecting Edit on an address line on the Department tab, this window will populate to edit the address.



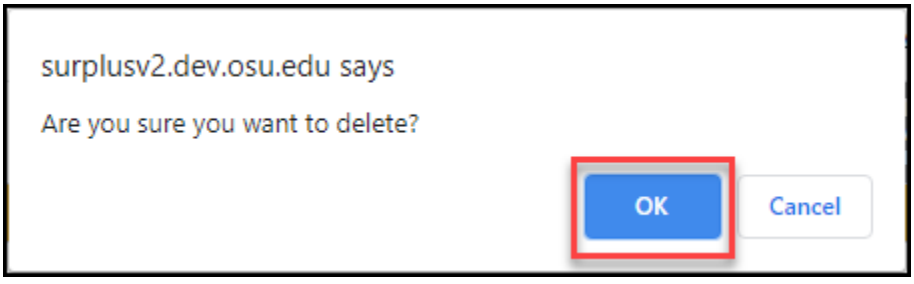
A. **Bldg #** – Enter or update the building number
B. **Building Name** – Enter or update the building name
C. **Street Address** – Enter or update the street address
D. **P.O. Box –** Enter or update the P.O. Box if applicable
E. **City** – Enter or update the city
F. **State** – Defaults to OH
G. **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

Delete Address

Select Delete on an address line on the Department tab.

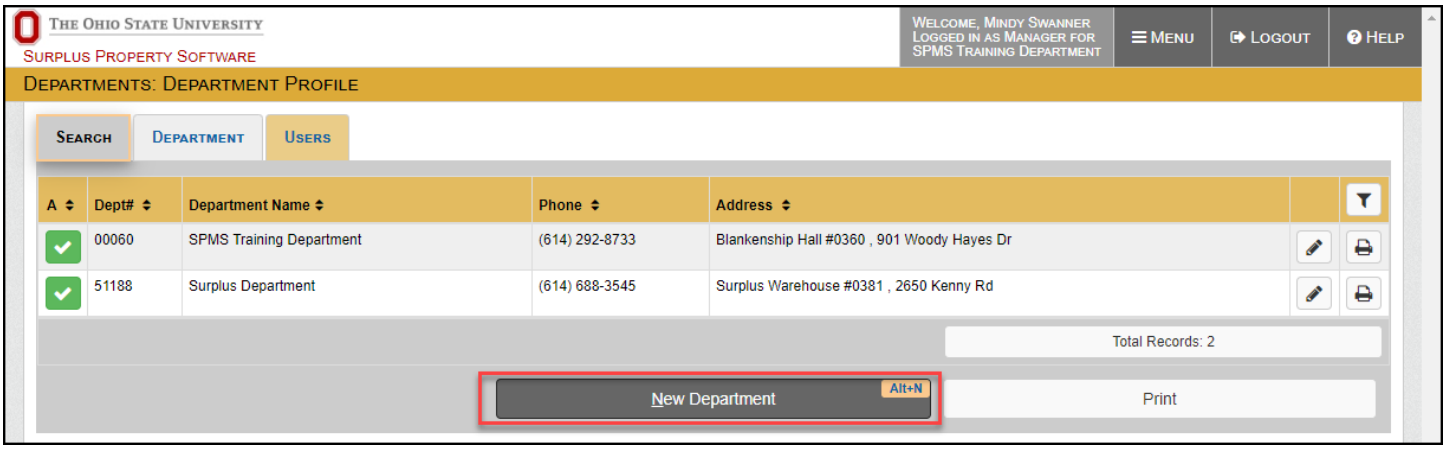


Then select OK to complete the deletion.

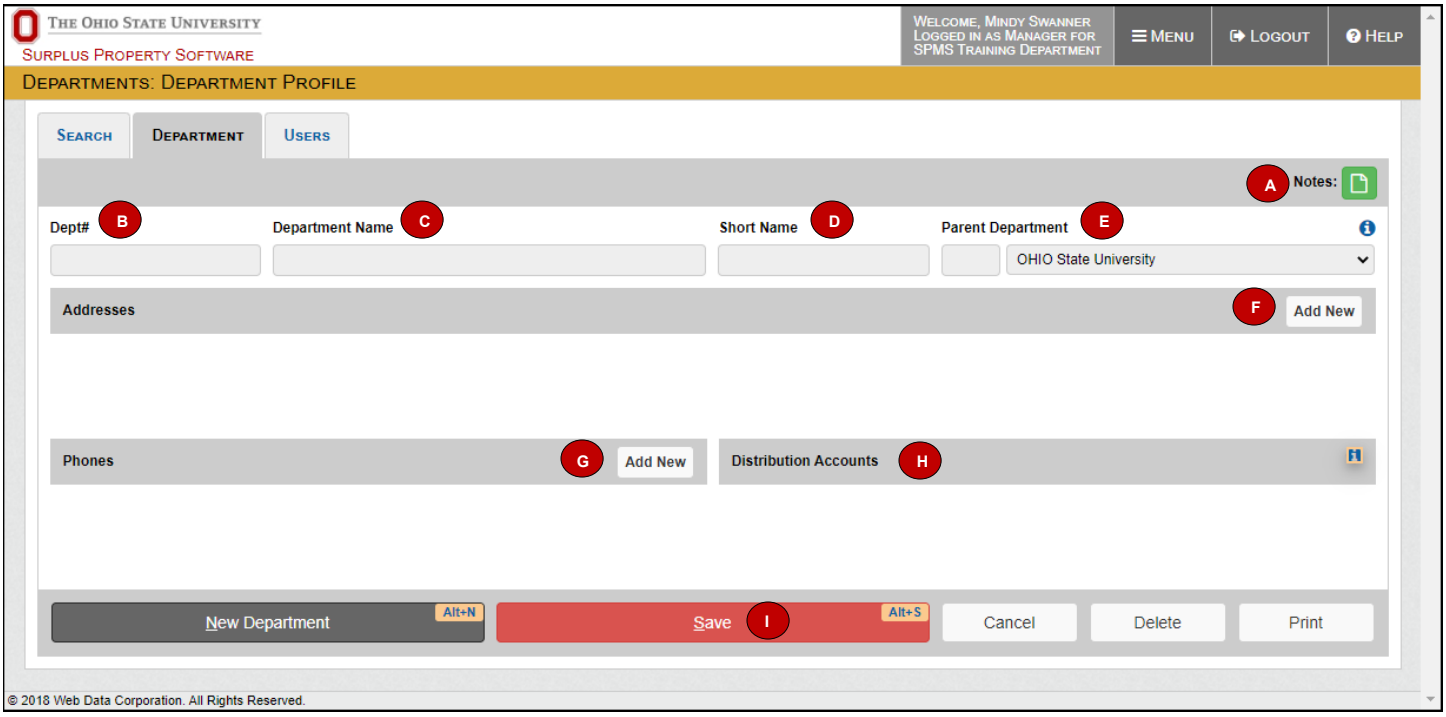


Add Department

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.



Complete the New Department Department Profile.



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) deaprtment 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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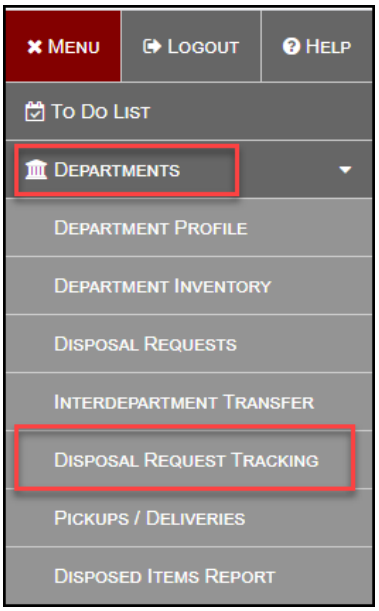
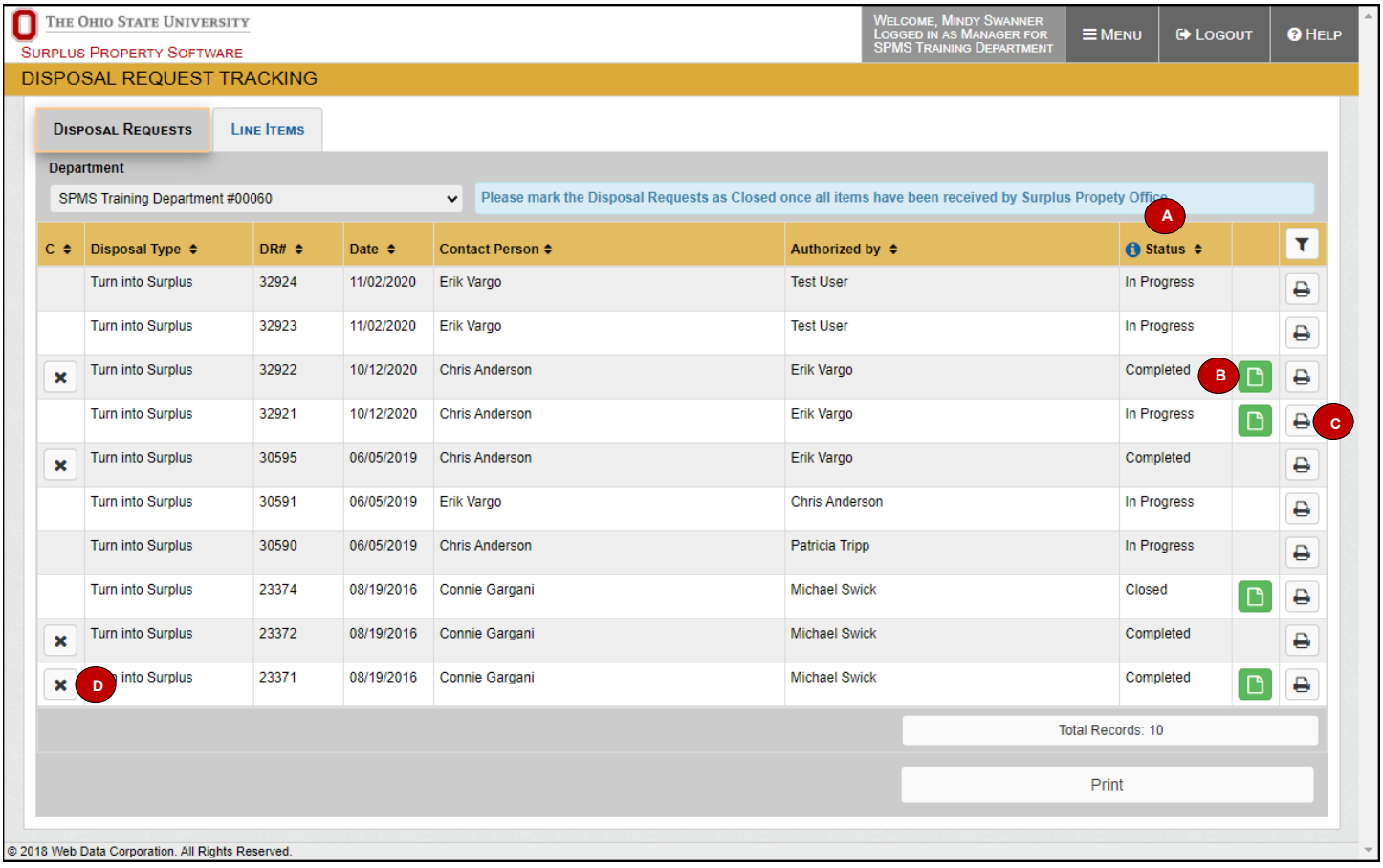
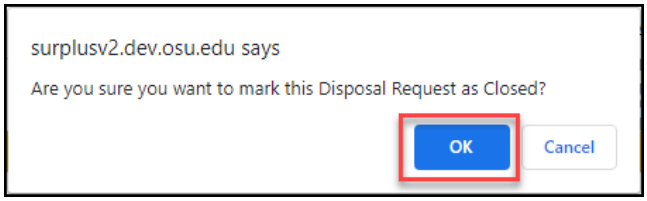
Close a Disposal Request

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



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