

Enter DirectLine Equipment Disposal Surplus List and Approval Process

Purpose: This user guide helps you through the process of creating an equipment surplus list for state-tagged items and obtaining management approval for disposal.

Audience: Users of DirectLine that maintain equipment records and supervisors that approve disposal lists.

Overview

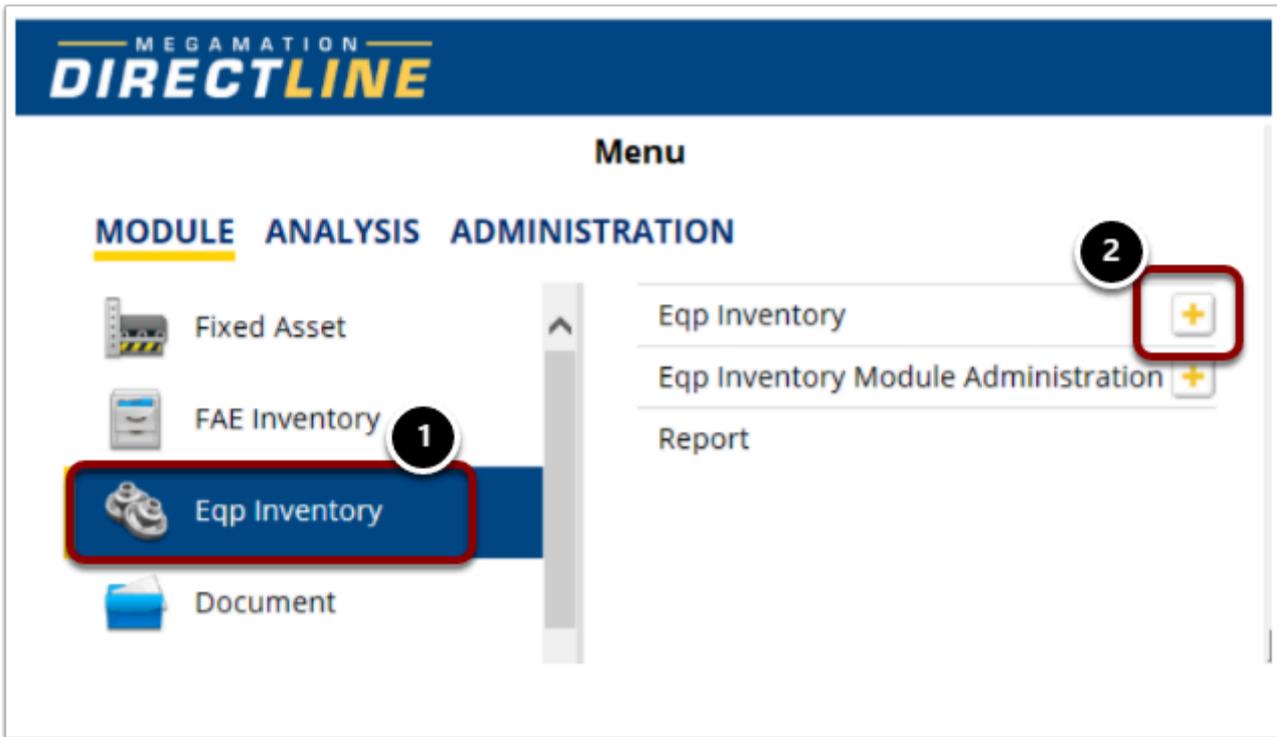
- If you are disposing of many items at once, include all items on one list.
- After list is created, secure management approval.
- If the items will be picked up by state surplus staff, enter the Department of Enterprise Services GA number on the surplus list.
- If you are handling your own disposal process, create a unique number that will help you identify this list of equipment.
- Once the list is approved, status, disposal date, reason, and authorization number will be updated on each piece of equipment.

 You will not be removing the asset record from DirectLine. All records must be retained for at least six years beyond the disposal date for auditing and records retention purposes. The status will change from "In-Service" to "Retired" and disposal date, reason, and authorization number fields will be updated.

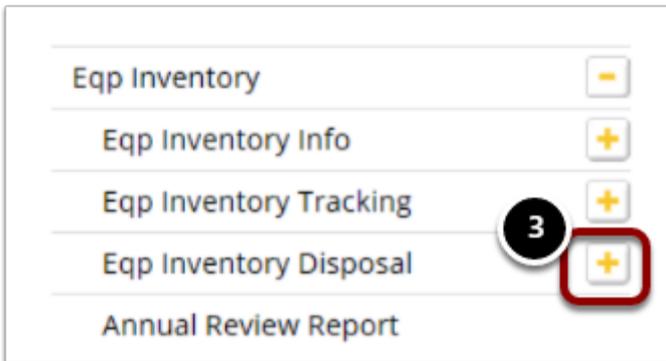
Select Items for Disposal

Navigation: Module / Eqp Inventory / Eqp Inventory / Eqp Inventory Disposal / Create Surplus List

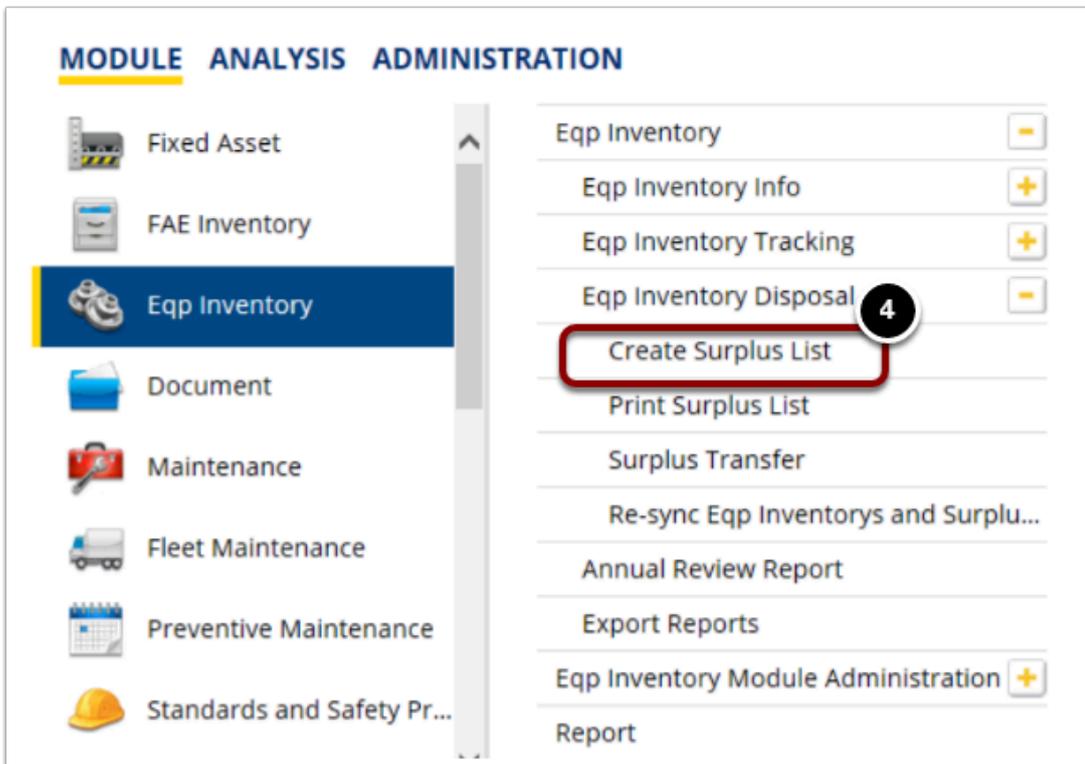
1. Under **Module**, select **Eqp Inventory** option.
2. Under **Eqp Inventory**, expand the **Eqp Inventory** option by selecting the plus (+) sign.



3. Expand the **Eqp Inventory Disposal** option by selecting the plus (+) sign.



4. Select the **Create Surplus List** option.



The **Eqp Inventory Surplus List** screen will display.

Note: The **Close Date** and **Appr Date** will be grayed out until the surplus list has been approved. The **Status** field will remain **Pending** until the approval workflow has been completed. The individual equipment records included in the surplus list will be updated when **Status** is changed to **Closed**.

5. **List ID** is an auto-number field. Don't change this.
6. Enter today's **date** to help you retrieve the list later and create reports.
7. Enter **disposal authorization number** if already known.
8. Enter **comments** to help you identify the contents on the list. Comments could include types of equipment, location for pick-up, lost, stolen, or damaged circumstances.

Next, start gathering the pieces of equipment to be disposed.

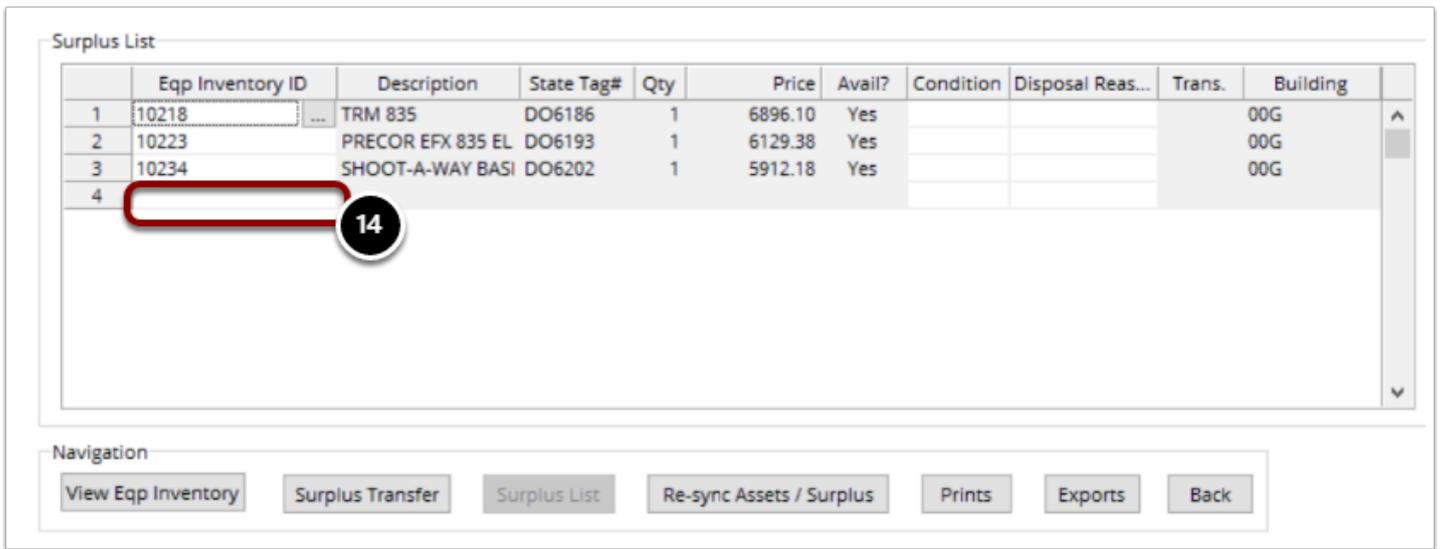
9. Open the **Eqp Inventory Search** screen to retrieve each equipment record.
10. Populate any of the search fields to narrow your search.
11. Select the **OK** button to retrieve search results.

12. Scan the search results and select the record(s) for disposal.
13. Select the **OK** button.

| ID | State Tag | DESCRIPTION | BUILDING_ID | ROOM | DEPARTMENT | PROGRAM | QUANTITY | Commodity | Inventory date | Total Cost |
|----|-----------|-------------|---------------------------------|------|----------------------|---------|----------|-----------|----------------|------------|
| 1 | 10156 | DO6156 | TREADMILL | 00G | G106 PE | NA | 1.00 | 7810 | 11 SEP 2018 | 5652.63 |
| 2 | 10193 | DO6169 | JUNGLE SYSTEM | 00G | G106 ATHLETICS | NA | 1.00 | 7810 | 11 SEP 2018 | 10794.38 |
| 3 | 10218 | DO6186 | TRM 835 | 00G | G106 PE | NA | 1.00 | 7810 | 11 SEP 2018 | 6896.10 |
| 4 | 10219 | DO6187 | FSP08 | 00G | G101 ATHLETICS | NA | 1.00 | 7810 | 07 SEP 2018 | 7961.47 |
| 5 | 10223 | DO6193 | PRECOR EPX 835 ELLIPTICAL FITNI | 00G | G106 PE | NA | 1.00 | 7810 | 11 SEP 2018 | 6129.38 |
| 6 | 10227 | DO6196 | EAGLE NX LEG PRESS MACHINE | 00G | G106 PE | NA | 1.00 | 7810 | 11 SEP 2018 | 6010.92 |
| 7 | 10228 | DO6195 | SCI FIT PRO 2 TOTAL BODY EXERC | 00G | G106 PE | NA | 1.00 | 7810 | 11 SEP 2018 | 5081.94 |
| 8 | 10234 | DO6203 | SHOOT-A-WAY BASKETBALL SHOK | 00G | G001 ATHLETICS | NA | 1.00 | 7810 | 07 SEP 2018 | 5912.18 |
| 9 | 10236 | DO6205 | PRECOR 835 TREADMILL | 00G | G106 ATHLETICS | NA | 1.00 | 7810 | 11 SEP 2018 | 6299.65 |
| 10 | 10304 | DO6269 | TREADMILL | 00G | ATHLETICS | NA | 1.00 | 7810 | | 7285.43 |
| 11 | 10305 | DO6270 | TREADMILL | 00G | ATHLETICS | NA | 1.00 | 7810 | | 7285.43 |
| 12 | 10306 | DO6271 | TREADMILL | 00G | ATHLETICS | NA | 1.00 | 7810 | | 7285.43 |
| 13 | 10307 | DO6272 | TREADMILL | 00G | ATHLETICS | NA | 1.00 | 7810 | | 7285.43 |
| 14 | CBC10472 | CBC10472 | ELLIPTICAL | 00G | G106 PE | NA | 1.00 | 7810 | 07 SEP 2018 | 5411.00 |
| 15 | DO5742 | DO5742 | WALL CLIMBER | 00G | G106 PE | NA | 1.00 | 7810 | 07 SEP 2018 | 10917.00 |
| 16 | DO5846 | DO5846 | ELLIPTICAL TRAINER | 00G | G106 PE | NA | 1.00 | 7810 | 07 SEP 2018 | 5801.00 |
| 17 | DO5847 | DO5847 | ELLIPTICAL TRAINER | 00G | G106 PE | NA | 1.00 | 7810 | 07 SEP 2018 | 5801.00 |
| 18 | DO5848 | DO5848 | TREADMILL | 00RS | HS235 HEALTH-SCIENCI | NA | 1.00 | 7810 | 18 JUL 2018 | 7186.00 |
| 19 | DO5923 | DO5923 | TREADMILL | 00G | G106 PE | NA | 1.00 | 7810 | 07 SEP 2018 | 7490.00 |
| 20 | DO5930 | DO5930 | PRECOR MOTION TRAINER | 00G | G106 PE | NA | 1.00 | 7810 | 11 SEP 2018 | 7277.00 |
| 21 | DO5942 | DO5942 | TOTAL BODY ELLIP | 00G | G106 PE | NA | 1.00 | 7810 | 11 SEP 2018 | 6314.00 |
| 22 | DO5943 | DO5943 | COMMERCIAL TREADMILL | 00G | G106 PE | NA | 1.00 | 7810 | 11 SEP 2018 | 6633.00 |
| 23 | DO6028 | DO6028 | STAIR/STEP CLIMBER | 00G | G106 PE | NA | 1.00 | 7810 | 11 SEP 2018 | 5761.00 |
| 24 | DO6042 | DO6042 | BODY EXERCISER | 00G | G106 PE | NA | 1.00 | 7810 | 11 SEP 2018 | 5530.00 |
| 25 | DO6047 | DO6047 | MOTION TRAINER | 00G | G106 PE | NA | 1.00 | 7810 | 11 SEP 2018 | 7565.00 |
| 26 | DO6058 | DO6058 | THE GUN | 00G | G001 ATHLETICS | NA | 1.00 | 7810 | 07 SEP 2018 | 7071.00 |
| 27 | DO6110 | DO6110 | TREADMILL | 00G | G106 PE | NA | 1.00 | 7810 | 11 SEP 2018 | 6267.00 |

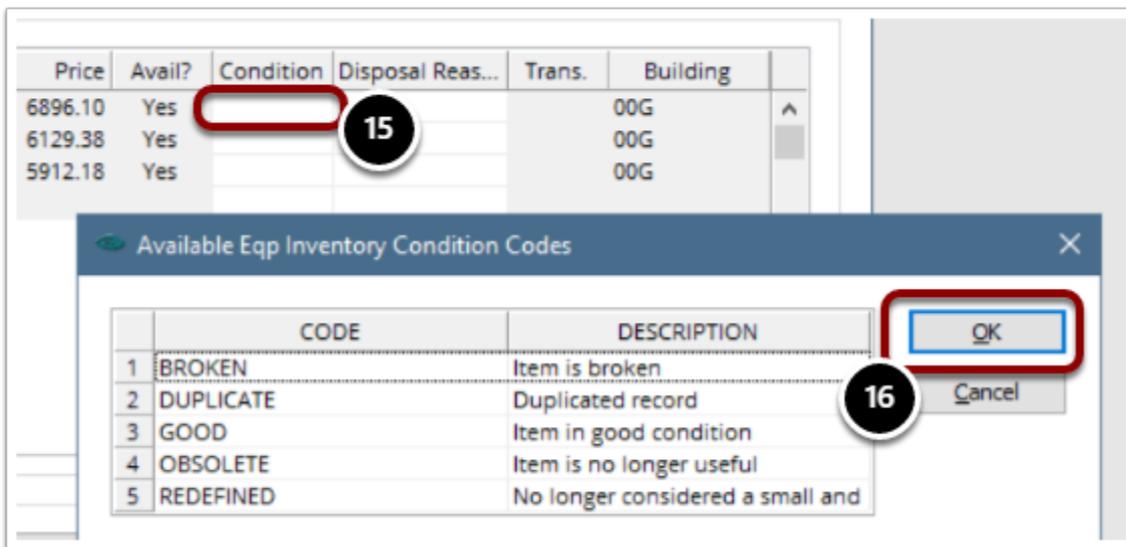
At the bottom of the table, there are buttons: 'OK', 'Cancel', 'Clear', 'Select All', 'Search...', and 'Print'. A red circle with the number '12' is around the first few rows of the table, and another red circle with '13' is around the 'OK' button.

14. Selected items will populate the surplus list. Don't update Condition or Disposal Reason yet, instead continue adding assets until your list is complete.



Once you've collected all the items for disposal:

15. Click on the first row for **Condition** and select the appropriate code.
16. Select the **OK** button.

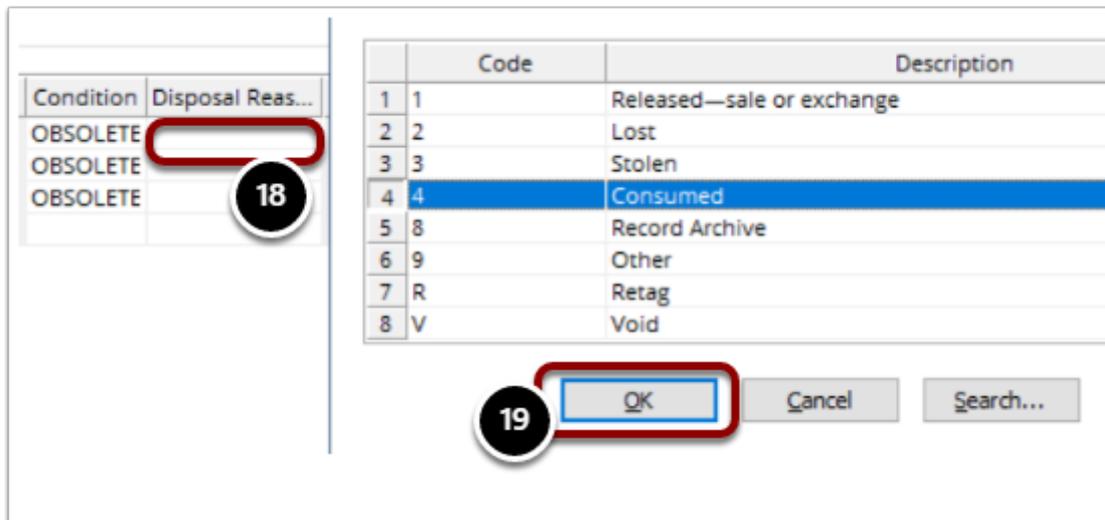


17. When you see the question, "Do you want this value applied to all entries?" answer **Yes** or **No**.

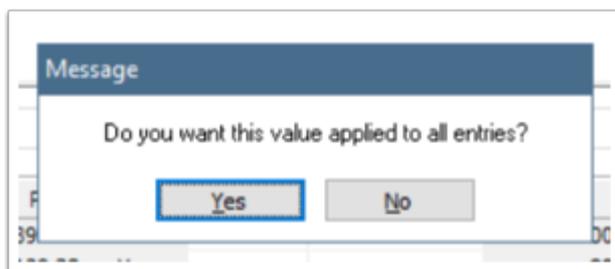


18. Click on the first row of **Disposal Reason** and select the appropriate code.

19. Select the **OK** button.

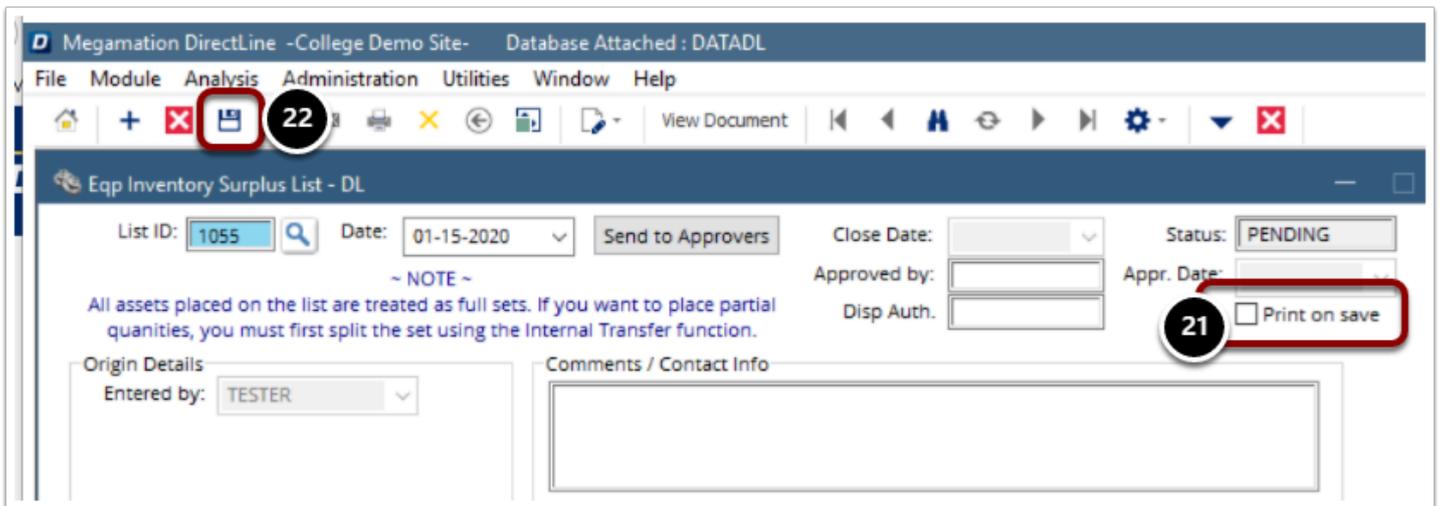


20. When you see the question, "Do you want this value applied to all entries?" answer **Yes** or **No**.

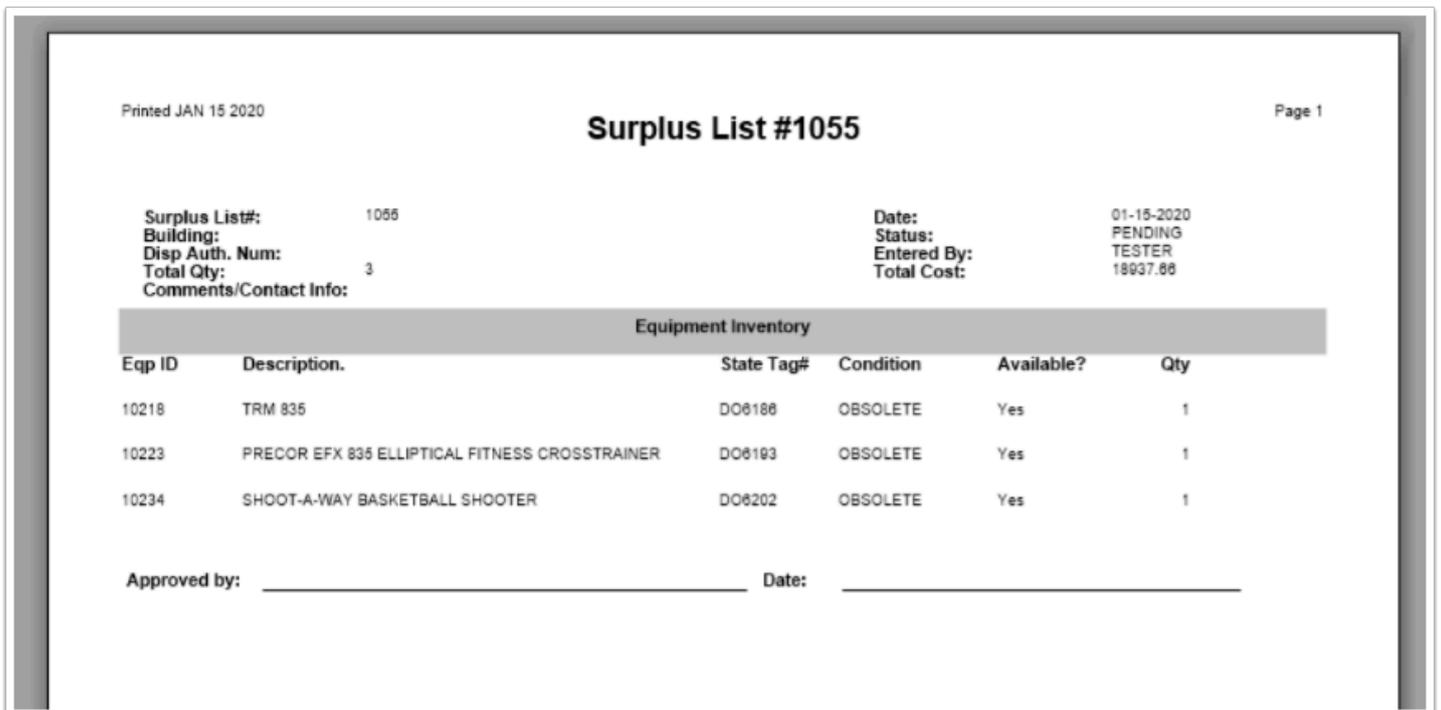


When you're satisfied all items have been listed with the appropriate condition and disposal reason:

21. Enter a check mark in the **Print on Save** check box if you want a printed copy right now.
22. Select the **Save** button from the list near the top of the page.



The printed Surplus List will include all the items and provide a signature and date line for management review. This is also handy if you keep hard copy files.

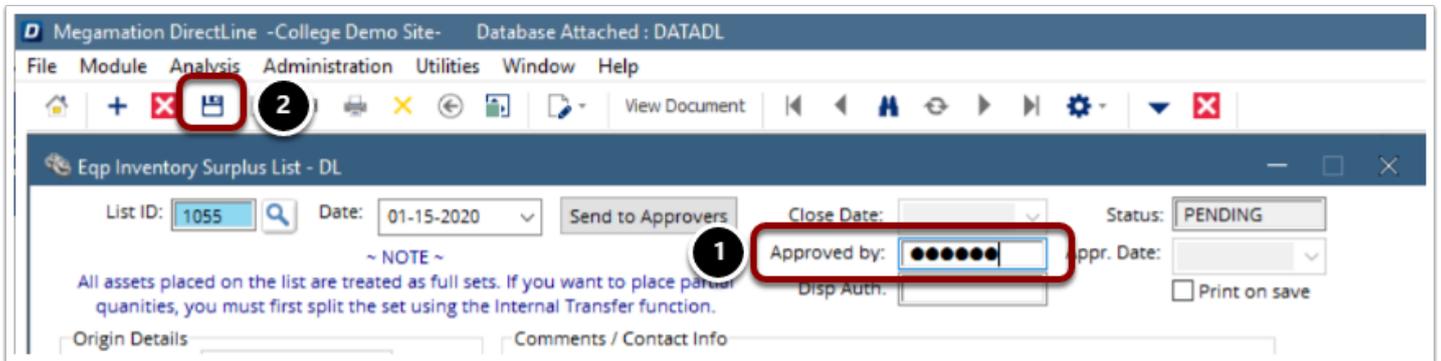


Management Approval Process

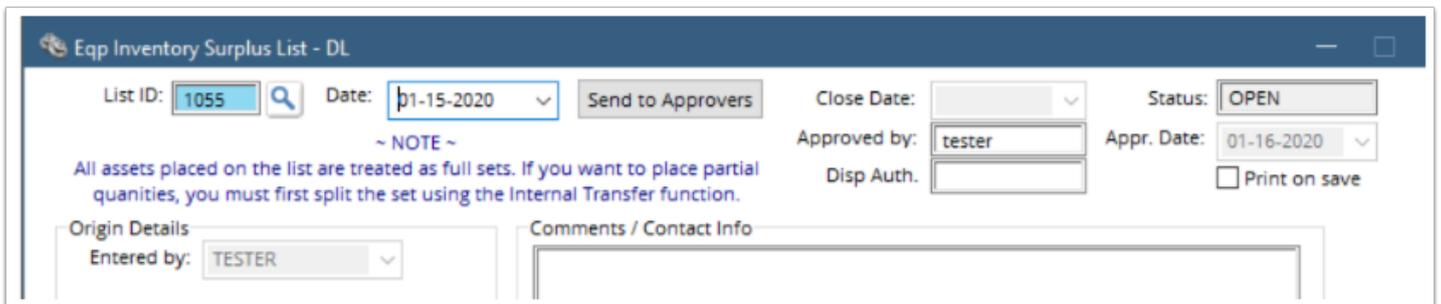
- After the Surplus List has been saved, your campus assigned "Approver" needs to release this batch. The approver of your choice needs to be assigned FAE-APPROVER rights in DirectLine. This individual should be someone in the Finance division that has no direct contact with the assets or is not involved in the decision to surplus an asset.

With the FAE-APPROVER logged in under their own credentials:

1. Enter the user password in the **Approved by** field.
2. Select the **Save** button from the list near the top of the page to save the record.



3. Once saved, the Status will change from **Pending** to **Open**. The **Approved By** and **Appr. Date** fields will be updated as well.



4. Make note of the List ID.
5. Select the **Surplus Transfer** button.

Eqp Inventory Surplus List - DL

List ID: **1055** Date: 01-15-2020 Send to Approvers Close Date: Status: OPEN

Approved by: tester Appr. Date: 01-16-2020

Disp Auth. Print on save

~ NOTE ~
All assets placed on the list are treated as full sets. If you want to place partial quantities, you must first split the set using the Internal Transfer function.

Origin Details Entered by: TESTER

Comments / Contact Info

Surplus List

| | Eqp Inventory ID | Description | State Tag# | Qty | Price | Avail? | Condition | Disposal Reas... | Trans. | Building |
|----|------------------|-------------------|------------|-----|---------|--------|------------|------------------|--------|----------|
| 1 | 10218 | TRM 835 | DO6186 | 1 | 6896.10 | Yes | OBSOLETE 4 | | | 00G |
| 2 | 10223 | PRECOR EFX 835 EL | DO6193 | 1 | 6129.38 | Yes | OBSOLETE 4 | | | 00G |
| 3 | 10234 | SHOOT-A-WAY BASI | DO6202 | 1 | 5912.18 | Yes | OBSOLETE 4 | | | 00G |
| 4 | | | | | | | | | | |
| 5 | | | | | | | | | | |
| 6 | | | | | | | | | | |
| 7 | | | | | | | | | | |
| 8 | | | | | | | | | | |
| 9 | | | | | | | | | | |
| 10 | | | | | | | | | | |
| 11 | | | | | | | | | | |

Navigation: View Eqp Inventory **Surplus Transfer** Surplus List Re-sync Assets / Surplus Prints Exports Back

6. A **Surplus Eqp Inventory Transfer** screen opens.
7. The **Transfer** is automatically numbered. Don't change anything.
8. Click the drop-down arrow beside the **Surplus** field.
9. Select the appropriate **Surplus List**.
10. Select the **OK** button.

Surplus Eqp Inventory Transfer - DL - <New Entry>

*Transfer: **10055** Approved by: Date: Print on save

Origin Details: Sender: Phone: *Surplus: **1055**

Destination Details: Receiver: Phone: *Campus:

Delivery Information: Shipper: Waybill: Contact Name:

Available Eqp Inventory Surplus Lists

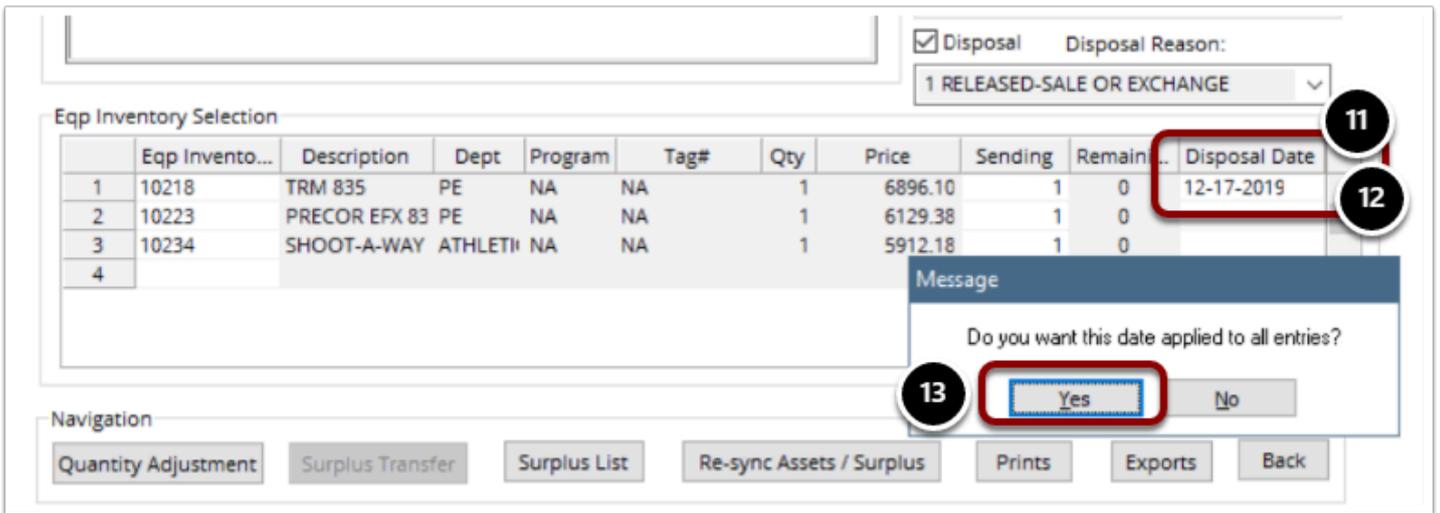
| | LIST_ID | DATE | STATUS | BUILDING |
|---|---------|------------|---------|----------|
| 1 | 1054 | 07-18-2019 | PENDING | 00T |
| 2 | 1055 | 01-15-2020 | OPEN | 00G |

OK Cancel Search...

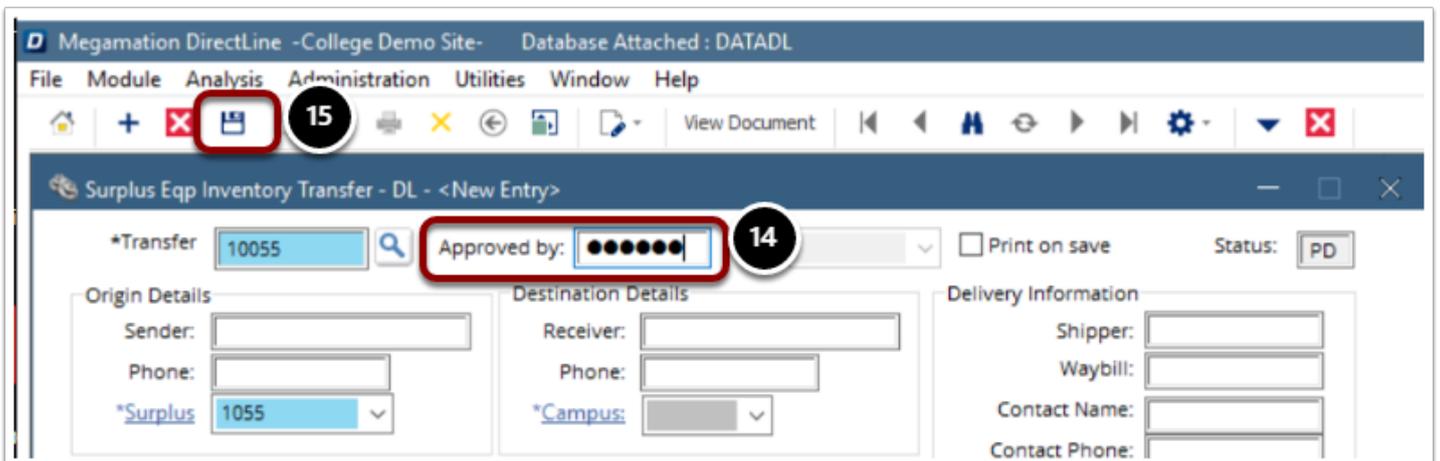
11. Enter a check mark into the **Disposal** check box.
12. Select **Disposal Reason** from drop-down list.



13. Click in the **Disposal Date** column in the first row of the equipment list.
14. Enter the date equipment was actually disposed or picked up (not today's date).
15. You'll be asked, "Do you want this date applied to all entries?" Select **Yes** or **No**.



16. Approver enters their password in **Approved by** field.
17. Select the **Save** button from the list near the top of the page to save the record.



18. The **Surplus Eqp Inventory Transfer** screen is now updated with:

- Approved by - approver user name
- Date - today's date
- Status - from PD (Pending) to CL (Closed)

Surplus Eqp Inventory Transfer - DL - <QBF Browse: 1 of 1>

*Transfer: 10055 Approved by: tester Date: 01-16-2020 Print on save Status: CL

Origin Details: Sender, Phone, *Surplus: 1055

Destination Details: Receiver, Phone, *Campus

Delivery Information: Shipper, Waybill, Contact Name

19. You should now know your DES disposal authorization number. Return to the Surplus List screen and enter that code in the **Disp Auth** field.

20. Confirm Status is now CLOSED.

Eqp Inventory Surplus List - DL

List ID: 1055 Date: 01-15-2020 Close Date: 01-16-2020 Status: CLOSED

Approved by: tester Appr. Date: 01-16-2020

Disp Auth: GA-12152019

~ NOTE ~
All assets placed on the list are treated as full sets. If you want to place partial quantities, you must first split the set using the Internal Transfer function.

Origin Details: Entered by: TESTER

Comments / Contact Info

21. You can check the status of the disposed equipment records from the **Eqp Inventory Entry** screen.

Eqp Inventory Entry - DL

*ID: 10218 Next Available ID Entered by: DWITTMAN Entry Date: 07-05-2017 Status: RT

Fixed Asset: Create/View *Acquisition Date: 05-01-2017 Transfer ID: 10055 Surplus List: 1055

General FAE/Cost Lease/Warranty Asset History State Tag: DO6186 RFID Tag:

| | | |
|-----------------------|-------------|---|
| Dispose Date : | 12-17-2019 | ▼ |
| Dispose Status: | 1 RELEASED- | ▼ |
| Disp Auth. Num: | | |
| Inventory Check Date: | 09-11-2018 | ▼ |
| Inventory Status: | | |

Process complete.