


# 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

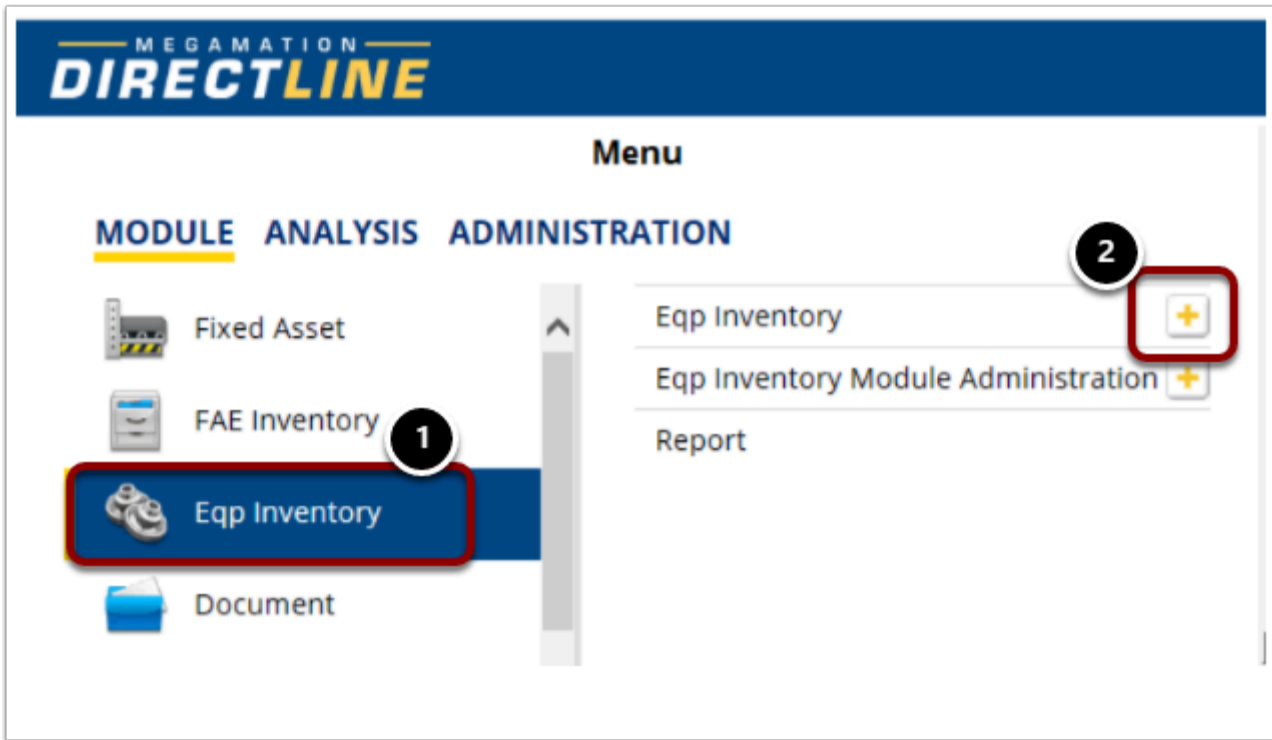
- If you are disposing of many items at once, include all items on one list.
- After list is created, secure management approval.
- If the items will be picked up by state surplus staff, enter the Department of Enterprise Services GA number on the surplus list.
- If you are handling your own disposal 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.

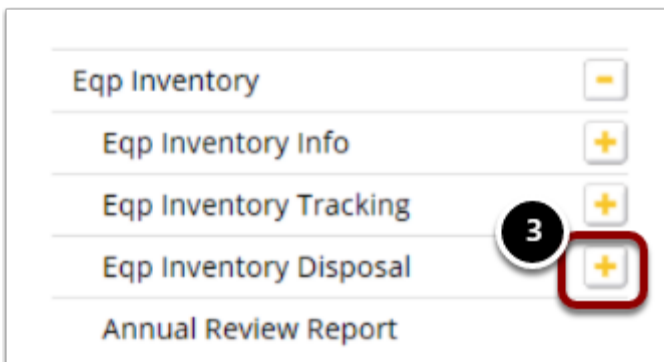
## Select Items for Disposal

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

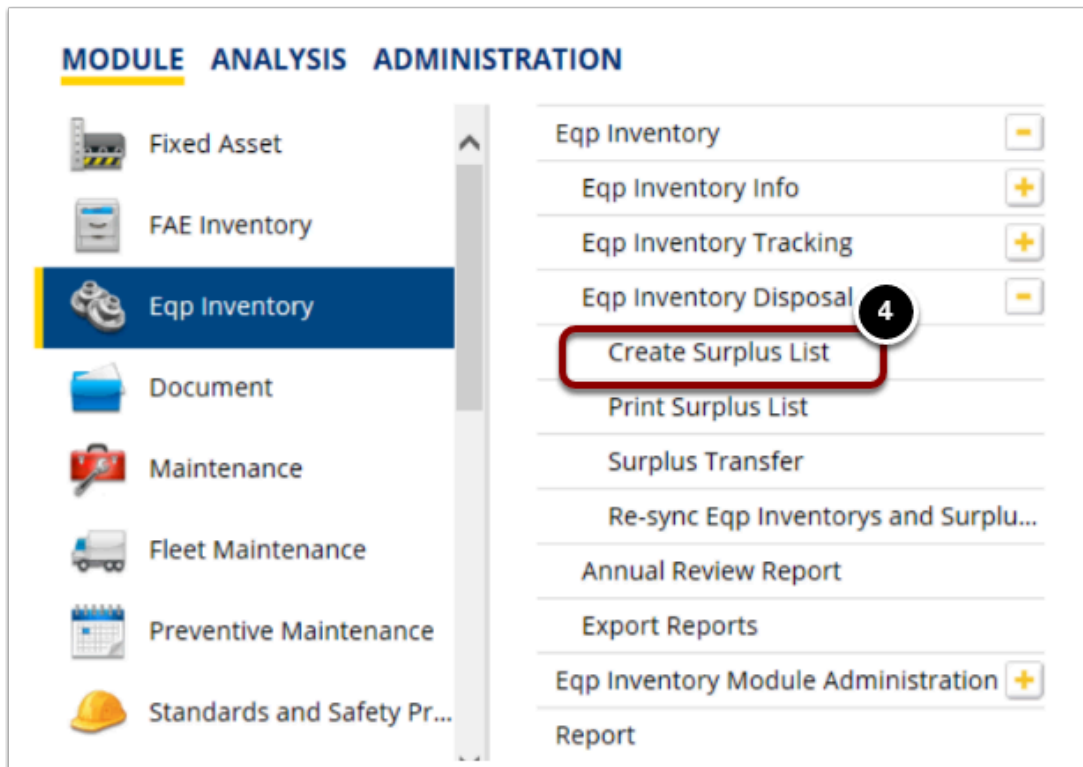
1. Under **Module**, select **Eqp Inventory** option.
2. Under **Eqp Inventory**, expand the **Eqp Inventory** option by selecting the plus (+) sign.



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.

The screenshot shows the 'Eqp Inventory Surplus List' form. Fields are numbered 5 through 8: 5. List ID (1021), 6. Date, 7. Disposal Auth., and 8. Comments / Contact Info. A note states: 'All assets placed on the list are created as full sets. If you want to place partial quantities, you must first split the set using the Internal Transfer function.'

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	DO6202	SHOOT-A-WAY BASKETBALL SHOK	00G	G001	ATHLETICS	NA	1.00	7810	07 SEP 2018	5912.18
9	10236	DO6203	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 is a navigation bar with buttons: 'OK' (highlighted with a red circle and the number 13), 'Cancel', 'Clear', 'Select All', 'Search...', and 'Print'.

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.

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				00G
2	10223	PRECOR EFX 835 EL	DO6193	1	6129.38	Yes				00G
3	10234	SHOOT-A-WAY BASI	DO6202	1	5912.18	Yes				00G
4										

Navigation

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

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.

Price	Avail?	Condition	Disposal Reas...	Trans.	Building
6896.10	Yes				00G
6129.38	Yes				00G
5912.18	Yes				00G

Available Eqp Inventory Condition Codes

	CODE	DESCRIPTION
1	BROKEN	Item is broken
2	DUPLICATE	Duplicated record
3	GOOD	Item in good condition
4	OBSOLETE	Item is no longer useful
5	REDEFINED	No longer considered a small and

OK   Cancel

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

Message

Do you want this value applied to all entries?

Yes   No

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

19. Select the **OK** button.

The screenshot shows a software interface with a table on the left and a larger table on the right. The left table has columns 'Condition' and 'Disposal Reas...'. The right table has columns 'Code' and 'Description'. The 'Consumed' entry (Code 4) is highlighted in blue. Below the tables, the 'OK' button is highlighted with a red circle and the number 19. There are also 'Cancel' and 'Search...' buttons.

Condition	Disposal Reas...
OBSOLETE	
OBSOLETE	
OBSOLETE	

	Code	Description
1	1	Released—sale or exchange
2	2	Lost
3	3	Stolen
4	4	Consumed
5	8	Record Archive
6	9	Other
7	R	Retag
8	V	Void

Buttons: OK, Cancel, Search...

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

The screenshot shows a 'Message' dialog box with the text 'Do you want this value applied to all entries?'. There are two buttons: 'Yes' and 'No'.

Message

Do you want this value applied to all entries?

Buttons: Yes, 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.

Megamation DirectLine -College Demo Site- Database Attached : DATADL

File Module Analysis Administration Utilities Window Help

Eqp Inventory Surplus List - DL

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

Approved by: Appr. Date: ☐ Print on save

Disp Auth.

~ 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

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.

Printed JAN 15 2020

Surplus List #1055

Page 1

Surplus List#: 1055  
Building: 3  
Disp Auth. Num: 3  
Total Qty: 3  
Comments/Contact Info:

Date: 01-15-2020  
Status: PENDING  
Entered By: TESTER  
Total Cost: 18937.88

Equipment Inventory					
Eqp ID	Description.	State Tag#	Condition	Available?	Qty
10218	TRM 835	DO6188	OBSOLETE	Yes	1
10223	PRECOR EFX 835 ELLIPTICAL FITNESS CROSSTRAINER	DO6193	OBSOLETE	Yes	1
10234	SHOOT-A-WAY BASKETBALL SHOOTER	DO6202	OBSOLETE	Yes	1

Approved by: \_\_\_\_\_ Date: \_\_\_\_\_

## 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.

Megamation DirectLine - College Demo Site- Database Attached : DATADL

File Module Analysis Administration Utilities Window Help

Eqp Inventory Surplus List - DL

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

~ 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 Comments / Contact Info

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

Eqp Inventory Surplus List - DL

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

~ 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

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



Eqp Inventory Surplus List - DL

List ID: **1055** 3 Date: 01-15-2020  Close Date:  Status: **OPEN**

~ 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.

Approved by: **tester** Appr. Date: 01-16-2020 ☐ Print on save  
Disp Auth:

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  
  4

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>

**5** \*Transfer **10055**  Approved by:  Date:  ☐ Print on save

Origin Details  
Sender:   
Phone:   
\*Surplus  6

Destination Details  
Receiver:   
Phone:   
\*Campus:

Delivery Information  
Shipper:   
Waybill:   
Contact Name:

Available Eqp Inventory Surplus Lists

	LIST_ID	DATE	STATUS	BUILDING
<b>7</b>	1054	07-18-2019	PENDING	00T
	<b>2 1055</b>	01-15-2020	OPEN	00G

**8**

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

Disposal Reason:

- 1 RELEASED-SALE OR EXCHANGE
- 2 Lost
- 3 Stolen
- 4 Consumed
- 9 Other
- R Retag
- E Delete-physically removes the record from

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

	Eqp Invento...	Description	Dept	Program	Tag#	Qty	Price	Sending	Remain...	Disposal Date
1	10218	TRM 835	PE	NA	NA	1	6896.10	1	0	12-17-2019
2	10223	PRECOR EFX 83	PE	NA	NA	1	6129.38	1	0	
3	10234	SHOOT-A-WAY	ATHLETI	NA	NA	1	5912.18	1	0	
4										

Message: Do you want this date applied to all entries?

Yes No

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

Megamation DirectLine - College Demo Site - Database Attached : DATADL

File Module Analysis Administration Utilities Window Help

Surplus Eqp Inventory Transfer - DL - <New Entry>

\*Transfer: 10055 Approved by: [Password Mask] Print on save: [ ] Status: PD

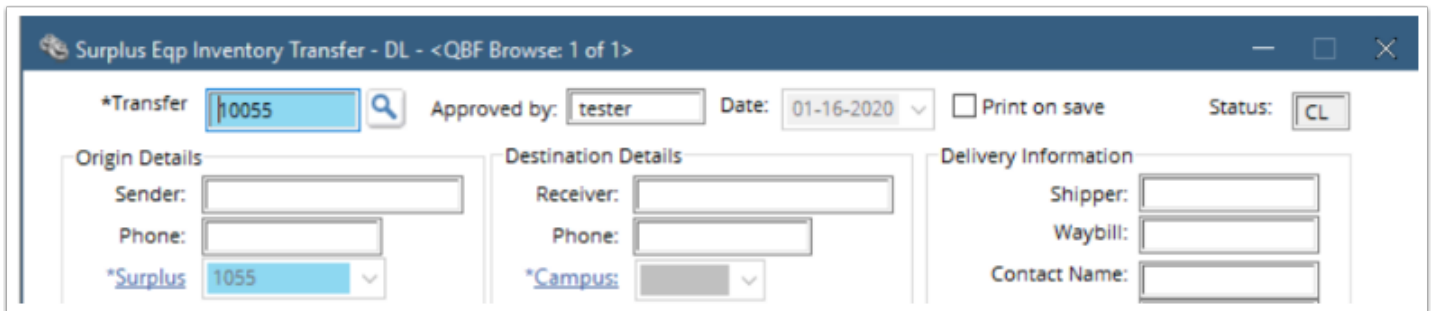
Origin Details: Sender: [ ] Phone: [ ] \*Surplus: 1055

Destination Details: Receiver: [ ] Phone: [ ] \*Campus: [ ]

Delivery Information: Shipper: [ ] Waybill: [ ] Contact Name: [ ] Contact Phone: [ ]

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)

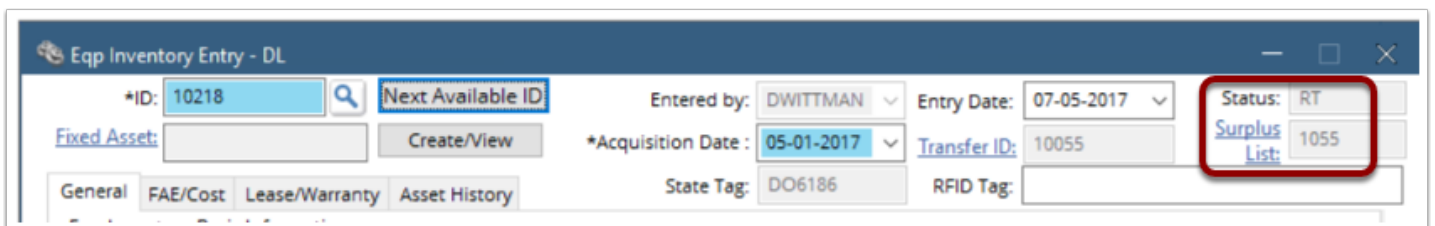


19. You should now know your DES disposal authorization number. Return to the Surplus List screen and enter that code in the **Disp Auth** field.

20. Confirm Status is now CLOSED.



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



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

Process complete.