

San Diego State University

Desktop Procedures for Surplus Property

SURPLUS PROPERTY

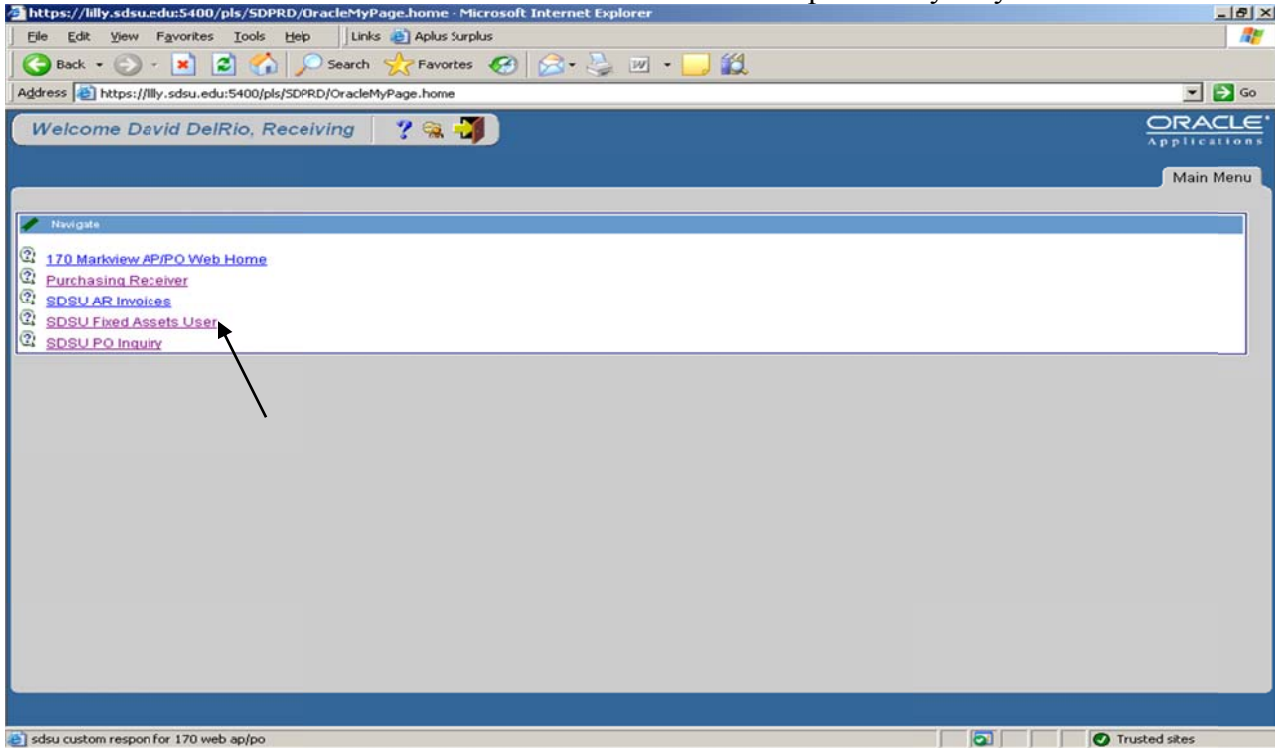
1. Departments with excess surplus equipment property may declare it surplus and Material Management will recover and relocate the surplus property. Departments are not authorized to dispose of any surplus equipment property.
2. Office moves that are not mandated must be paid by the requesting department; an Oracle chargeback account number must be provided. An estimate of cost for moving project(s) can be provided by Material Management. Office moves that are mandated do not require a chargeback account, for a list of yearly mandated projects contact the office of Material Management at ext. 40950.
3. To execute the pickup of surplus property, or an office move, departments must complete in detail and fax a Moving Service Request Form (MSRF) to the Office of Material Management. This form is located at the following link: <http://bfa.sdsu.edu/busserv/MoveServicesForm.pdf>
4. Hard drives on all computers must be wiped clean of personal information and removed from the computer. This process must be completed by the department. All defective media (audio tapes, video tapes, etc.) must be removed from systems/equipment and labeled for destruction. For surplus computers if the appropriate box (Hard Drive Wiped and Removed) is not checked on the MSRF, the moving crew will not remove this equipment. Material Management will reschedule a pickup when this procedure is complete.
5. Material Management will make every effort to pick up surplus property as soon as possible. In order to comply with IT Security requirements, all MSRF that have computers and/or hard drives listed will be scheduled together and processed immediately.
6. It is suggested that departments submit separate request for their surplus pick-up and department moves.
7. When removing equipment property the moving team will look for all SDSU E-Tags or serial numbers affixed to property and record every visible barcode on the MSRF. Internal Departmental inventory lists may be attached with the MSRF; this makes it easy to identify the surplus equipment at the time of removal. The moving team will check list for accuracy; any discrepancies will be corrected on the MSRF immediately.
8. On days when computers and/or hard drives are schedules for pickup, the moving team will drop the hard drives into secure the lock box located in the equipment property cage. A Business Service employee will make sure that the box is secure and locked at all times.
9. It is the responsibility of the moving team to ensure that department personnel sign, date and record the correct starting time and ending time. Upon department's signature the moving team lead is required to sign the MSRF and take full responsibility of the surplus property.
10. After all moving service request forms are completed, the moving team will check- in with Material Management to verify that all surplus equipment is accurately identified; SDSU staff will sign and provide instructions of disposal method.
11. All Moving Service Request Forms are returned to the Office of Material Management at the end of the work day.

SURPLUS PROPERTY

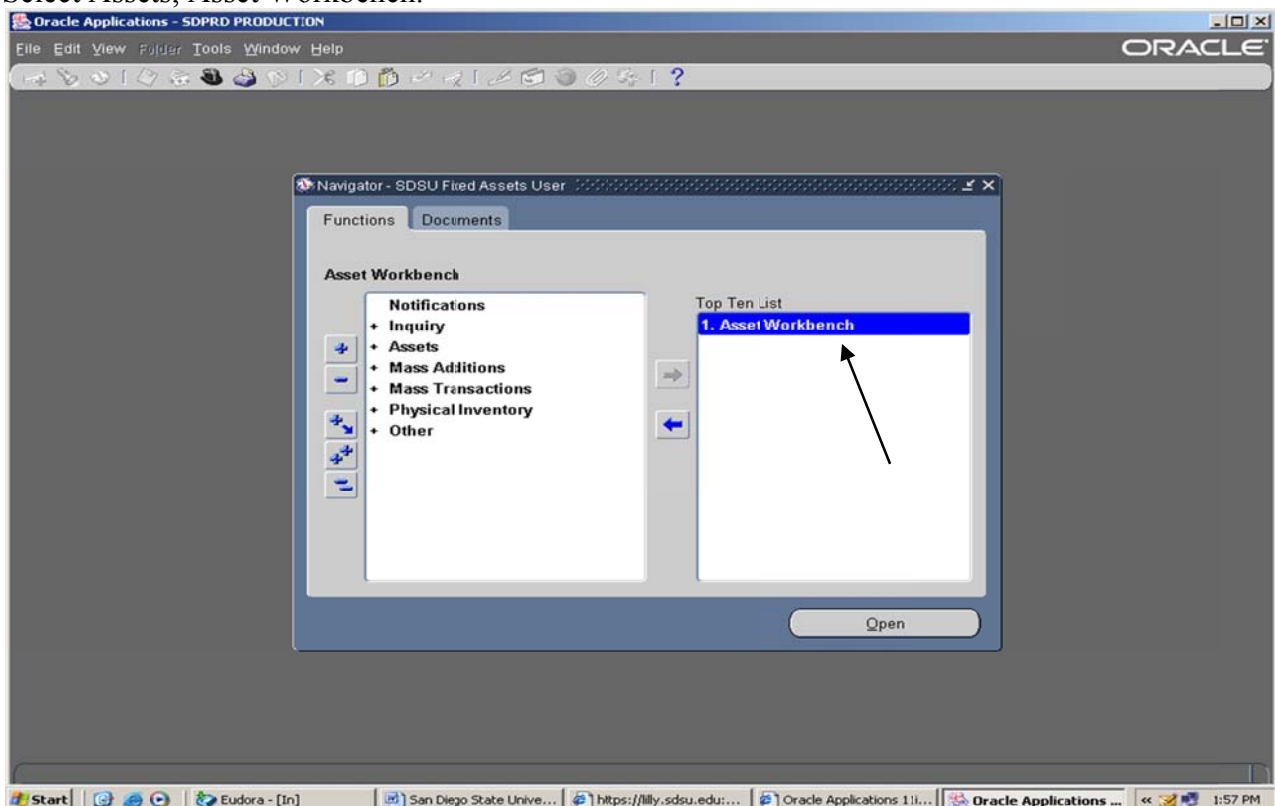
12. Property Survey Report(s) are created with sequential unique numbers starting with 001 followed by the current fiscal year, for example 001-09-10.
13. Moving Service Request Form(s) that have surplus equipment property listed are used as a record for updating/transferring the location information in Oracle. A Survey document is prepared and surplus equipment property may be moved off campus in preparation for sale or disposal upon approval of at least one (1) property board member and the property program administrator.
14. Surplus property may be retired in Oracle upon approval of at least two (2) property board members and the property program administrator. All surplus equipment property offered for sale at public auction and any item salvaged or trashed must be identified and listed on either the Moving Service Request Form or Property Survey Report Details Sheet.
15. For recording purposes all capital and non-capital surplus property listed on the Survey Property Report Detail sheet must include Asset type, State ID, Description, Manufacturer Name, Serial Number, Date placed in service and original cost. Accurate disposal cost for both capital and expense must be listed in the appropriate column of the Survey Report.
16. All Electronic waste to include SB20, Cathode Ray Tubes and Plasma panels are collected, stored and labeled as electronic waste. These items are recycled in strict compliance with guidelines set by the California Environmental Protection Agency (EPA), and the Department of Toxic Substances Control pursuant to section 66273.83.
17. "Surplus furniture" is a variety of desk, chairs, tables and cabinets. "Surplus office" equipment is a variety of fax machines, telephones, calculators, electrical devices etc. This type of property is non-tracking and does not require detailed information on the Property Survey Report. A brief description of the non-tracking property, total quantity of pieces and manner of disposal is all that is required. Usually a brief description of such non-tracking property is already provided by the department on the MSRF; if any additional information is required Material Management will make the necessary changes.
18. All property returned to surplus must be transferred in Oracle to the appropriate surplus area.
19. After all monthly surplus transfers are completed, run Hyperion Intelligence Designer Reports (Brio) to create the spreadsheet used to compare against the Mass Retirement Oracle report.

EQUIPMENT TRANSFER

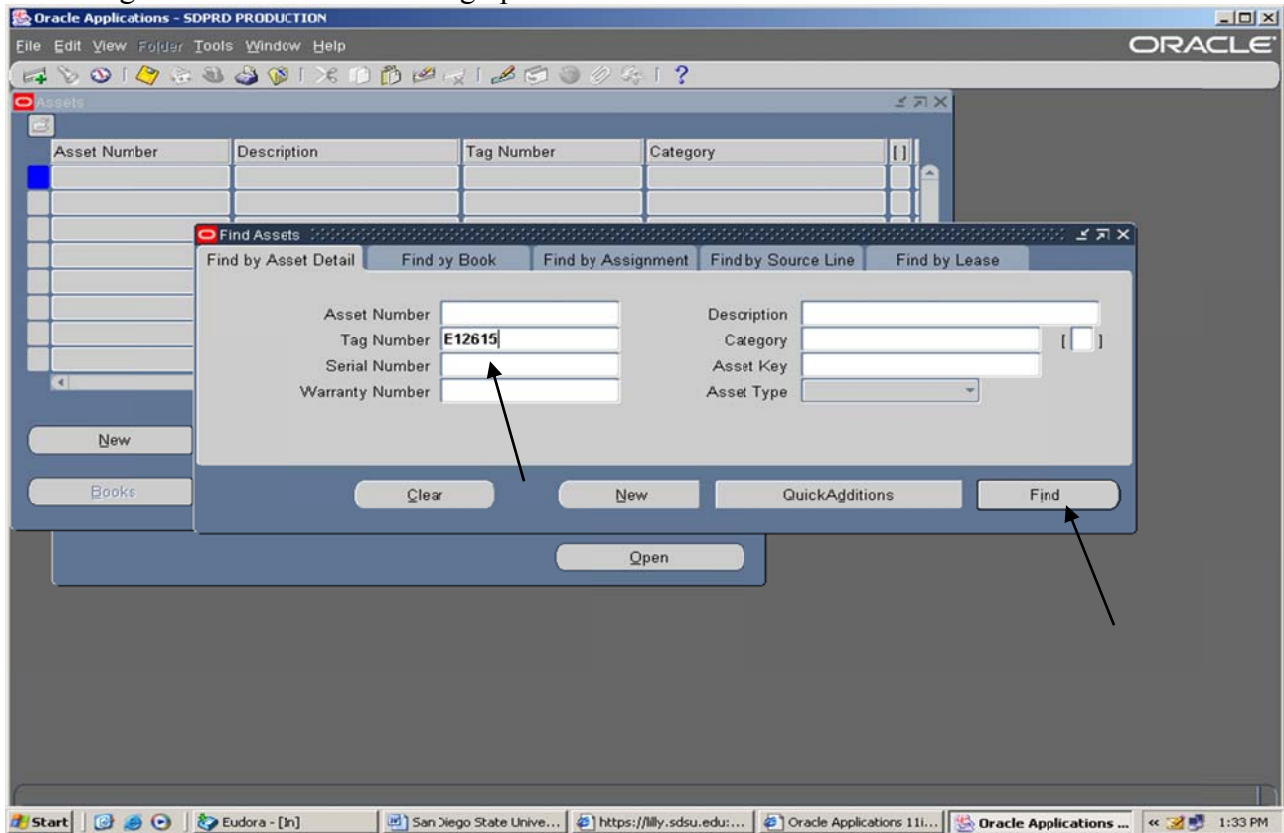
1. After equipment property is removed from the department and delivered to surplus; equipment location records are updated in Oracle.
2. Asset Workbench will allow you to transfer individual E-TAG numbers from current locations to surplus. To access Asset Workbench select SDSU Fixed Asset User responsibility on your first Oracle window.



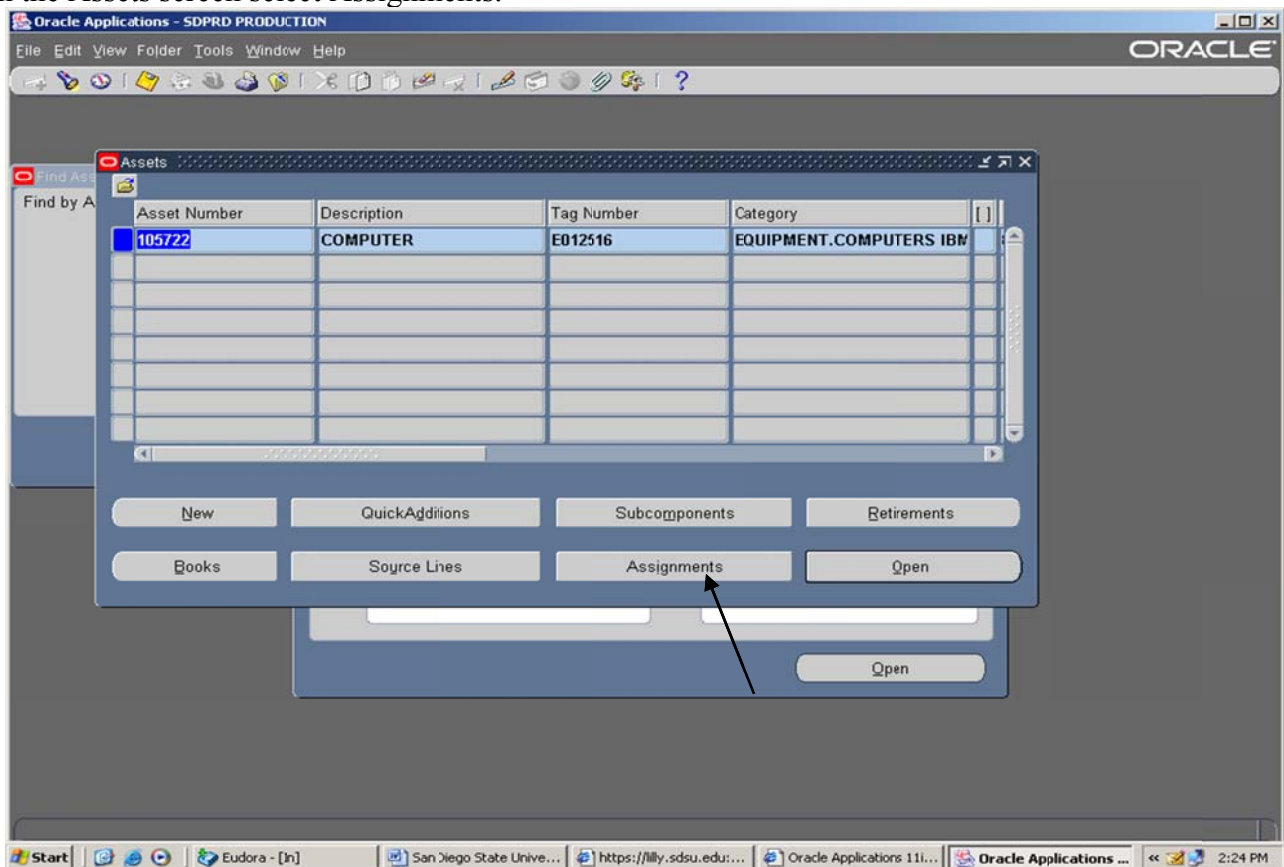
3. Select Assets, Asset Workbench.



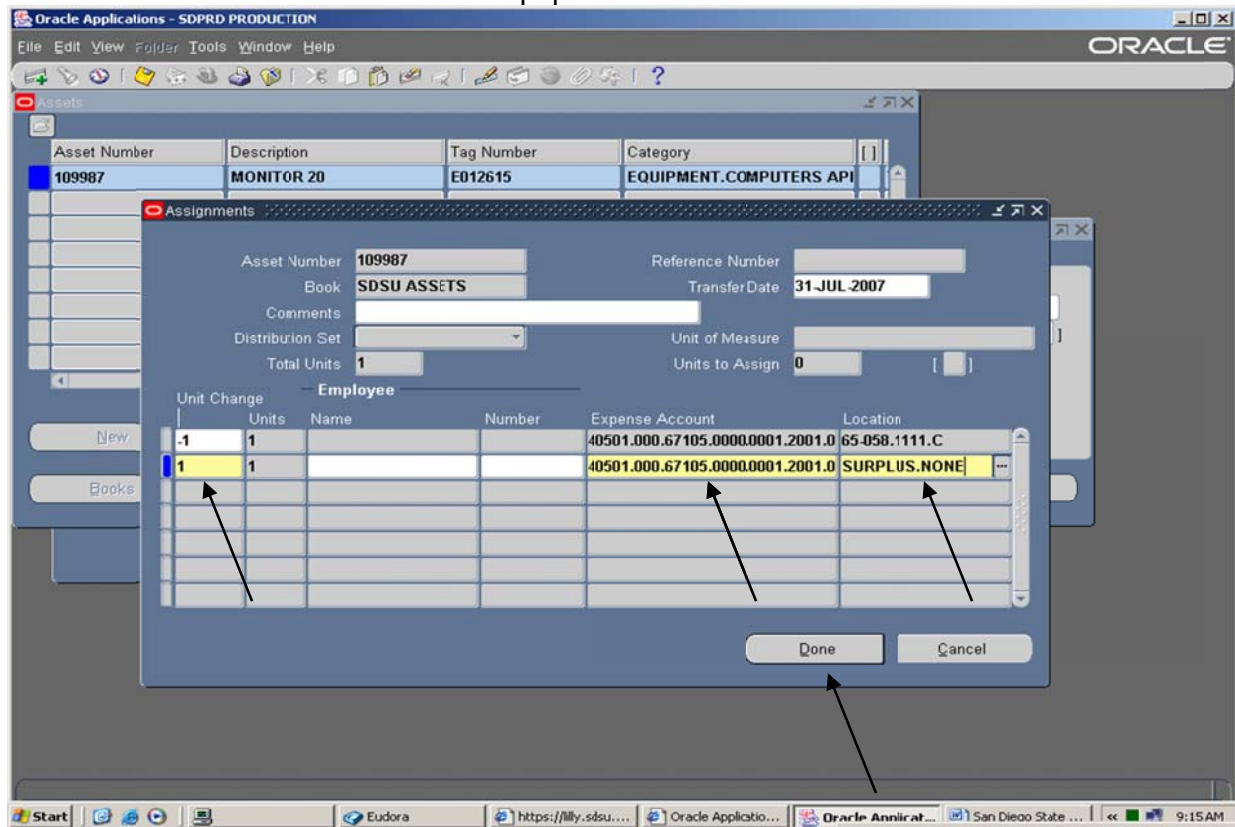
4. The Find Assets screen will appear enter the E-TAG number in the tag number field that requires transferring. Select find this will bring up the Assets screen.



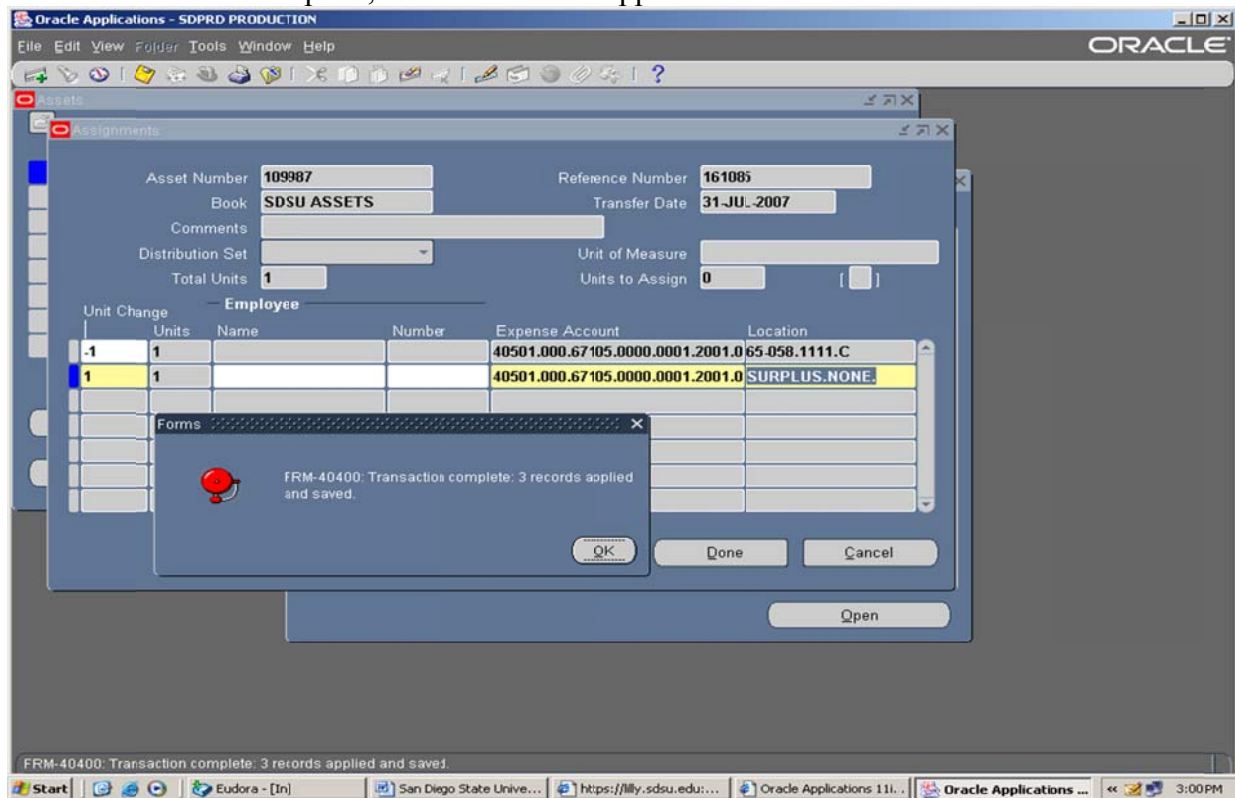
5. In the Assets screen select Assignments.



6. In the Assignments screen on the first line under Unit Change enter -1, select the second line in the same field and enter 1. The yellow highlight will appear on the opened fields, insert the same Oracle string on the Expense Account and the new destination of the equipment in the location window. Select Done to save.



7. If the transaction is complete, 3 records will be applied and saved.



RETIREMENTS

1. Mass Retirements by location (i.e. Surplus None) are performed when multiple items from that area are being disposed.
2. Individual Retirements are performed when one or two items are being disposed.
3. In the Navigator-SDSU Fixed Asset User window select Mass Transactions, Retirements, Create & Reinststate.
4. Mass Retirements screen select the SDSU ASSETS in the book field.
5. The Retirement Type must correspond with the disposal method on the Survey Document. Select the retirement type field and select method of retirement. You have to retire Capital and Expense separately, make sure to run reports for each retirement. Items retired and cost must match.

Mass Retirements

Book **SDSU ASSETS** Mass Transaction Number

Status **New** Retire Date **31-AUG-2007**

Retirement Type **Sale** Proceeds of Sale **0.00**

Units Cost of Removal **0.00**

Retire Subcomponents Project Number

Comments Task Number []

Retirement Criteria Addit

Asset Type **CIP** Fully Reserved Yes No

Expense Accounts **Expensed** - []

Location Number []

Employee Name Asset Key []

Category - []

Cost Range - []

Asset Numbers - []

Dates in Service - []

Create **Discard** **Retire** **Review**

6. In the Location flex field list the Building and Room number or description of the area where items are being retired.

Oracle Applications - SDPRD PRODUCTION

File Edit View Folder Tools Window Help

Mass Retirements

Book **SDSU ASSETS** Mass Transaction Number
Status **New** Retire Date **31.AUG-2007**
Retirement Type **Sale** Proceeds of Sale **0.00**
Units Cost of Removal **0.00**
 Retire Subcomponents Project Number
Comments Task Number []

Retirement Criteria Additional Criteria

Asset Type Fully Reserved Yes No
Expense Accounts
Location

Location Flexfield

CAMPUS/BUILDING **SURPLUS** SURPLUS STORAGE AREA
ROOM **NONE**
SPACE

OK Cancel Combinations Clear Help

7. Select Create and record the Mass Transaction Number.

Mass Retirements

Book **SDSU ASSETS** Mass Transaction Number **592**
Status **New** Retire Date **31.AUG-2007**
Retirement Type **Sale** Proceeds of Sale **0.00**
Units Cost of Removal **0.00**
 Retire Subcomponents Project Number
Comments Task Number []

Retirement Criteria Additional Criteria

Asset Type Fully Reserved Yes No
Expense Accounts
Location **SURPLUS.NONE.**
Employee Name
Category
Cost Range
Asset Numbers
Dates in Service

Note APP-OFA-48278: Concurrent Request 911984 submitted. OK

Create Discard Retire Review

Go back to Create and Reinststate at the menu bar select View-Query By Example-Enter (Screen will turn blue) Match the Mass Transaction number (ie 592). View-Query by Example-Run, at this time choose Discard (if error) or Retire to complete Mass Retirement.

10. Run a Single Request for Retirements by Cost Center from Oracle to attach to the Property Survey Report. The dollar amount on these reports must coincide.

13. All tracking Property must be retired in Assets Management (Oracle) with 45 days from date of disposal.

11. Completed copies of Property Survey Reports listed on the Monthly Summary Sheet are submitted to the Office of Financial Reporting by the 10th of every month.

These desktop procedures are in addition to the Material Management guidelines set in place. Desktop procedure may change when Material Management guidelines are revised, system upgrades are implemented or new recycling trends and State compliances are required.