

### Transferring a TAGGED asset to Surplus—

1. Click the “**Transfers**” tab up top.
2. Under “**Transfer Sidebar**” on the left, make sure “**surplus**” is selected
3. Under “**Create Surplus Transfer,**” Fill out the following info:
  - a. From Position (should be auto filled with your position)
  - b. Any notes you may have about the pickup. Example: “Desk is Very Heavy.”
  - c. Workday location
  - d. Location notes. Example: “Inside the lab & next to the red bookcase”
  - e. Fill out your contact info
  - f. Set Delivery Type to “**NSHEBCN Pickup**” unless you plan to deliver to us, in which case should be discussed with the surplus team beforehand.
  - g. Set the requested pickup date. Note: Must be at least 7 days out
4. Click “**Create**”
5. Once it takes you to the new screen, the header for your surplus pickup will be created.
6. Under “**Add Assets**” type in the tag number or use the magnifying glass to open a large lookup to select an asset.
7. Once one is selected click “**add asset**” to make the asset drop into the “**assets**” box.
  - a. Note: when transferring multiple assets, assets need to be added into this box one at a time.
8. Once all assets desired to be surplusd are added, print your labels to attach to items.
9. Click “**submit for approval**” to send to surplus

### Transferring a NON-TAGGED item to Surplus—

1. Click the “**Transfers**” tab up top.
2. Under “**Transfer Sidebar**” on the left, make sure “**surplus**” is selected
3. Under “**Create Surplus Transfer,**” Fill out the following info:
  - a. From Position (should be auto filled with your position)
  - b. Any notes you may have about the pickup. Example: “Desk is Very Heavy.”
  - c. Workday location
  - d. Location notes. Example: “Inside the lab & next to the red bookcase”
  - e. Fill out your contact info
  - f. Set Delivery Type to “**NSHEBCN Pickup**” unless you plan to deliver to us, in which case should be discussed with the surplus team beforehand.
  - g. Set the requested pickup date. Note: Must be at least 7 days out
4. Click “**Create**”
5. Once it takes you to the new screen, the header for your surplus pickup will be created.
6. In the middle “Add Asset” section click on the blue “**Create New Asset**” link.
7. A new window will open for you. Please enter/ edit ONLY the following information:
  - a. Asset Description. EX: “Wooden Chair.”
  - b. Quantity of items.
  - c. Serial number, Make/ Manufacturer, Model & Model year (if applicable)
8. Click “**Save & Done**” up top. Repeat as needed
9. Once all assets desired to be surplusd are added, print your labels to attach to items.
10. Click “**submit for approval**” to send to surplus