

# SAMS

## Site Asset Management System

### Surplus – Procedure for Disposal of Surplus

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Surplus is the excess inventory that is no longer needed or available.

Schools/Departments are to notify Purchasing and contract Services (PCS) of goods to be disposed of. PCS will determine if an item is usable and advise School/Department regarding disposal. When we dispose of items in our inventory, we must keep a record of what happened to that item for insurance purposes.

Therefore, we only use the **Delete** key when we have duplicate items otherwise, we "**Surplus**" the item. CPU's are the only exception and can be deleted once removed from the site as ITS keeps a Master Record of District CPU's.



#### IF GOODS ARE USABLE

##### Step One:

If the item is in good condition, the School/DU will post the item *For Sale* on the internal website for other Schools/DU's to have the opportunity to obtain. Surplus ads are released via SAMS. The ad shall be posted for a minimum of 3 weeks.

##### Step Two:

If no School/Department claims the item(s) an email will be sent to issuer re: status after 3 weeks. Once Purchasing has been advised, it will be posted to the external surplus website. Emails can be sent out advising staff that the item(s) are available to them for personal purchase. A letter can also be sent home with students as well as to Community Leagues, Daycares and Non-Profit Organizations in the area. The ad will be publicly accessible on our **External Surplus Assets** site after 3 weeks' duration, which includes charitable organizations, daycares, parents and staff.

Once the goods are spoken for, complete a **Bill of Sale/Transfer of Ownership** with copies for both the School/Department and the receiver. The form is available on the *Surplus Assets* and *Purchasing and Contract Services* websites.

When the sale is complete, *Resolve* the sale in Surplus Assets with descriptions on how and when the item was disposed, in the **Description** field, i.e. "Sold to Minchau on Jan 10, 2014", or "Disposed via ABC Dump Inc. on Jan 20, 2014."

Once complete, put it in your **Surplus** location in SAMS. **Update** the item.

Other references:

- Appendix iii - **Bill of Sale/Transfer of Ownership**
- Appendix iv - **Facilities Maintenance Disposal Authorization Form**

The Items you add to Surplus are no longer in the main body of your inventory but can still be referenced through your **Surplus** location.

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### Surplus – Procedure for Disposal of Surplus, continued

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#### IF GOODS ARE NOT REUSABLE

##### Step One:

If not salvageable or useable, the School/DU will be authorized by PCS, via email, (cc to Facilities Maintenance) to issue a ***Service Request*** for pick-up of the item(s).

##### Step Two:

In SAMS, status the item **Removed from Inventory** and move it to your ***Surplus*** location and **Update**.

#### Surplus Inventory Clean Up

Schools are to keep items in the **Surplus** location of their inventory for a minimum of 3 years after it has been removed from the school. If you wish to clean up your Surplus folder, compile a report of all items older than 3 years and Export it to Excel. This report must be forwarded to *Purchasing and Contract Services* (PCS) to be kept in your permanent file. Once you receive permission from PCS, you may then delete the reported items from your inventory.

# SAMS Site Asset Management System

## Surplus Assets – PCS Website Information

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### Tips & Guidelines:

- Authorization to dispose of items must be granted by Purchasing & Contract Services (PCS).
- Surplus items may be disposed of as follows:
  - o Post for sale on the **Surplus Assets** website
  - o Send for disposal/recycling
  - o Auction on **Yahoo**
  - o Auction on **GovDeals.com**. Contact **PCS** to arrange this.

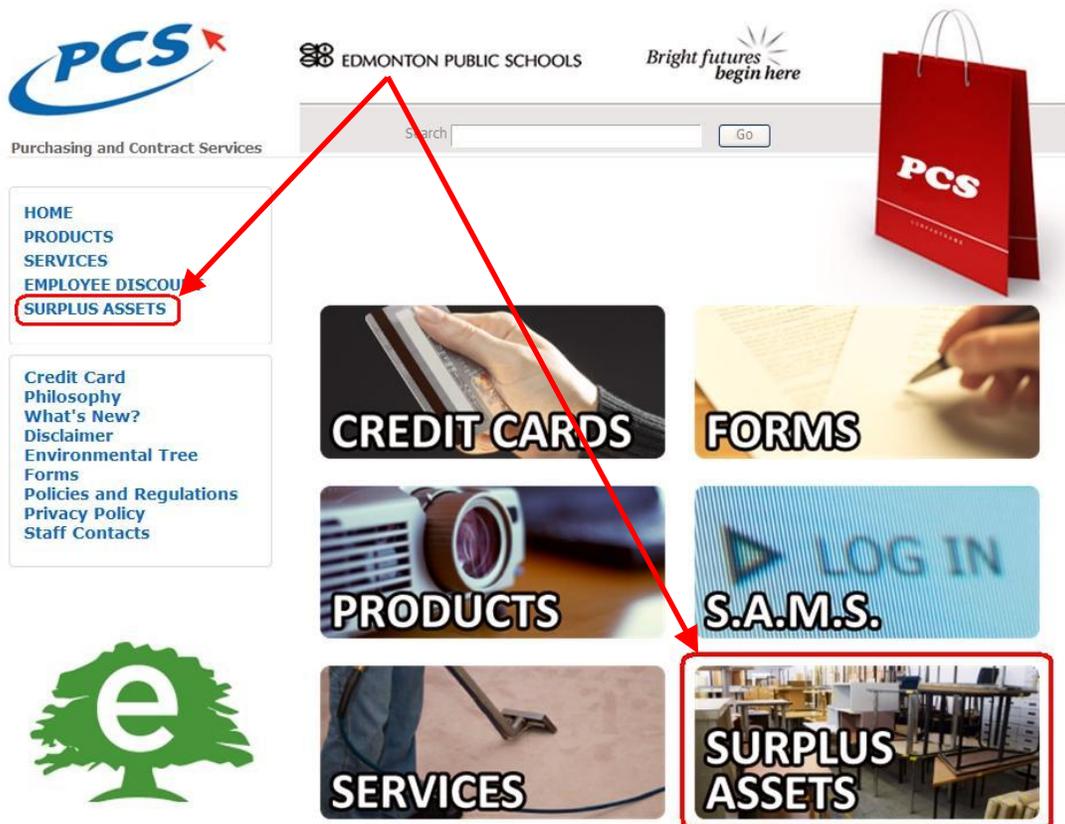
The **Surplus Assets** website looks the same for both the internal and external **Purchasing & Contract Services** websites. For the purpose of this example, we will refer to the internal site.

Internal: [Purchasing.epsb.ca](http://Purchasing.epsb.ca)

External: <https://purchasing.epsb.net/pcsi-external/>

([www.epsb.ca](http://www.epsb.ca) → Departments and Services → Purchasing and Contract Services)

On the Home Page, click on **Surplus Assets**:



# SAMS Site Asset Management System

## Surplus Assets – PCS Website Orientation

You will be taken to the **Surplus Assets Home Page**

**Surplus Assets** Login

**Categories**

- + Equipment (1)
- + Music (1)
- + Miscellaneous (1)
- + Furniture (1)
- + Tables (1)

**Locations/Sites**

- J. Percy Page (1)
- Computer Centre Services (1)

**General Information**

- Removal/Disposal of Items

**Welcome to Surplus Assets**

SAMS Users: If you are not a Global Admin you must add the item in SAMS first, then post to Surplus from the item's page.

**Recent Ads** Feb 09, 2012

**Travel master shell**

NO IMAGE AVAILABLE \$500.00

Travel master shell, Wenger Series 64, about 10 panels, approx. 20 years old but in good condition.

**Printer Table**

 \$5.00

Wooden and metal

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When you initially enter the Surplus Website you are seeing the **external** Surplus Assets page.

Login to be linked to the **internal** site which gives you access to new ads that are not available to the public yet.

Site Asset Management

Login

Username:

Password:

**Note:** The login is the same for SAMS and Surplus Assets.

- An item must be available internally for a minimum of **3 weeks**. If it does not sell in that time, then the item can be sold externally.
- To post your item to the external website, contact Purchasing and Contract Services.

Items on the Surplus site can be searched by **Category** or **Location/Sites**. Click to enter the links on the left.

### General Information

Upon first entering the website click on **Removal/Disposal of Items**:

- Review the **Surplus-Procedure for Disposal**
  - This is the proper procedure for removal of your Surplus and should be followed each time removal of inventory is considered.
- Note the **Bill of Sale** form and the **Facilities Maintenance Disposal Authorization Form**. These are legal documents for your use for proper removal of items from your School/DU (see **Appendices iii and iv of this manual**).

# SAMS Site Asset Management System

## Surplus Assets – PCS Website Orientation, continued

To view ads click any ad to enter.

The screenshot displays the SAMS website interface. On the left is a navigation menu with categories like Equipment, Music, Miscellaneous, Furniture, and Tables. The 'Printer Table' advertisement is shown in the main content area, including details like Name, Category, Price, Description, Contact Email, and Date Added. Below this is an 'Additional Information' section with fields for Site, Condition, Quantity, Description, and Images. A 'Back' button is located at the bottom of the advertisement details. Red arrows point to the 'Furniture (1) Tables (1)' category, the 'Contact Email' field, and the 'Images' thumbnail.

**Surplus Assets** Login

**Categories**

- + Equipment (1)
- + Music (1)
- Miscellaneous (1)
- Furniture (1)**
- Tables (1)

**Locations/Sites**

- J. Percy Page (1)
- Computer Centre Services (1)

**General Information**

- Removal/Disposal of Items

**Printer Table**

**Advertisement Details**

Name	Printer Table
Category	<b>Furniture &gt; Tables</b>
Price	\$5.00
Description	Wooden and metal
Contact Email	<a href="mailto:amanda.witoshynski@espbc.ca">amanda.witoshynski@espbc.ca</a>
Date Added	Feb 09, 2012

**Additional Information**

Site	Computer Centre Services
Condition	Good
Quantity	1
Description	Wooden and metal
Images	

[Back](#)

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### Notes:

- The **Category** the item is in is highlighted.
- **Contact Email**: Clicking the email automatically creates an email to that contact.
- **Images**: Click the thumbnail to view the pictures in full size.

Click the **Back** button to return to the main page.

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## Site Asset Management System

### Surplus Assets - How to Advertise

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**Disclaimer: Authorization to dispose must be given by Purchasing & Contract Services (PCS).**

PCS will determine and advise the School/DU if the item is usable or for disposal.

- Review the **Procedure for Disposal of Surplus** on the Surplus Assets website under **General Information**, or on Pages 21-22 in this manual.

**Advertise for Sale:**

*In order to advertise on the Surplus Assets website, you must first create the item in SAMS.*

**SAMS Users:** If you are not a Global Admin you must add the item in SAMS first, then post to Surplus from the item's page.

- In SAMS, go to the **Edit Item** screen by **clicking the Item Name**.
  - On the **Update** menu at the bottom of the screen, click on **Advertise for Sale**.
- Note:** Do not change the status of the item to "For Sale", this is automatically updated after posting.
- **Advertising Details** – Write you advertisement for the Surplus site
  - **Additional Information Listed** – Copy your SAMS details into Surplus. Click the check boxes of the details you wish to list in your advertisement.

Editing Advertisement for Wireless Headset (Item #194865)

**Advertisement Details**

**Price (\$)**

**Description**

**Contact Email**

**Additional Information Listed**

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <b>Name</b>	Wireless Headset
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <b>Category</b>	Equipment > Business Machines > Phones
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <b>Site</b>	Purchasing
<input type="checkbox"/>	<input type="checkbox"/> <b>Location</b>	TEST - Reception
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <b>Condition</b>	Excellent
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <b>Make</b>	Jabra
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <b>Model</b>	GO 6470
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <b>Quantity</b>	1
<input type="checkbox"/>	<input type="checkbox"/> <b>Description</b>	2nd Piece: Remote Handset Lifter Jabra GN 1000 RL 0DYB45HBA

Click **Submit**.

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### Surplus Assets - How to Advertise, continued

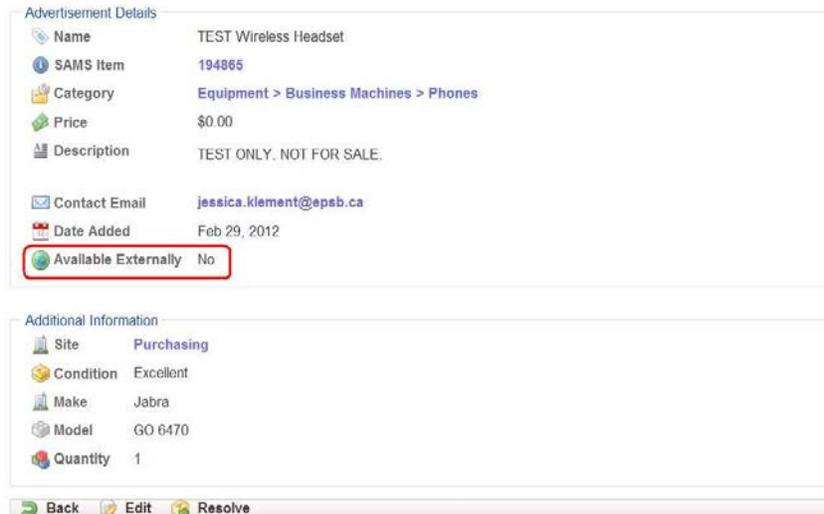
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Re-enter the **Edit Item** screen. At the bottom of the page there is a new box called **Surplus History** that links to your ad. In this example, you would click on **Ad #11** to go directly to the Surplus Website Ad.



This is what the Surplus ad will look like:

TEST Wireless Headset

A screenshot of an advertisement details page. The "Advertisement Details" section includes: Name (TEST Wireless Headset), SAMS Item (194865), Category (Equipment > Business Machines > Phones), Price (\$0.00), Description (TEST ONLY. NOT FOR SALE.), Contact Email (jessica.klement@epsb.ca), and Date Added (Feb 29, 2012). The "Available Externally" checkbox is checked and highlighted with a red box. The "Additional Information" section includes: Site (Purchasing), Condition (Excellent), Make (Jabra), Model (GO 6470), and Quantity (1). At the bottom are buttons for Back, Edit, and Resolve.

#### Available Externally:

- "Externally" refers to the Public Purchasing Website. All ads are posted internally for 3 weeks. After 3 weeks, a notice will be sent to you requesting an update. You can then contact Purchasing to request that the item be posted to the external site.

#### Options:

Click **Back**, to view your ad summary as it will appear on the Surplus Assets page.

Click **Edit**, to make changes to the Surplus Assets ad.

The **Resolve** button is used once an arrangement has been made for the removal of the item from the premises or if the School/DU decided not to dispose of the item.

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### Surplus Assets - How to Advertise, continued

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Clicking **Resolve** brings you to the Resolution Details screen.

- Select a **Resolution** type. You can choose between **Sold**, **Disposed**, or **Kept Item**.
  - If you chose to keep the item upon resolution it will be removed from the Surplus Asset website and remain in your inventory as **"In Use"**.

For **Sold** or **Disposed**, enter the removal details under **Comments**. Be specific.

Resolving Advertisement for TEST Wireless Headset (Item #194865)

Resolution Details

Resolution: Sold

Comments

Sold Examples:  
Eg. 1: Sold to District Technology for \$10.00 on Apr 5, 2011  
Eg. 2: Donated to ABC Support Society on May 7, 2011

Disposed Examples:  
Eg. 3: Picked up by XYZ Disposal Corp. on June 21, 2011  
Eg. 4: Broke - Thrown away as of July 15, 2011

Cancel Resolve

Clicking **Resolve** in this screen will remove the item from inventory. You will be asked to confirm.



**In SAMS:**

Your item will now show as **Removed from Inventory** in your **Item List**.

**Note:** It will still be in its original category.

TEST Wireless Headset	Removed From Inventory	TEST - Reception	Jabra	GO 6470	0QFA111K5B0
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**Click the Item Name:**

- In the **Edit Item** screen, change the Location to **Surplus**.
- Scroll down to the **Surplus History**. The details you entered when you resolved the item in **Surplus Assets** are now available to you in **SAMS**.
- Click **Update**.

The item will now be in your **Surplus** location.

# SAMS

## Site Asset Management System

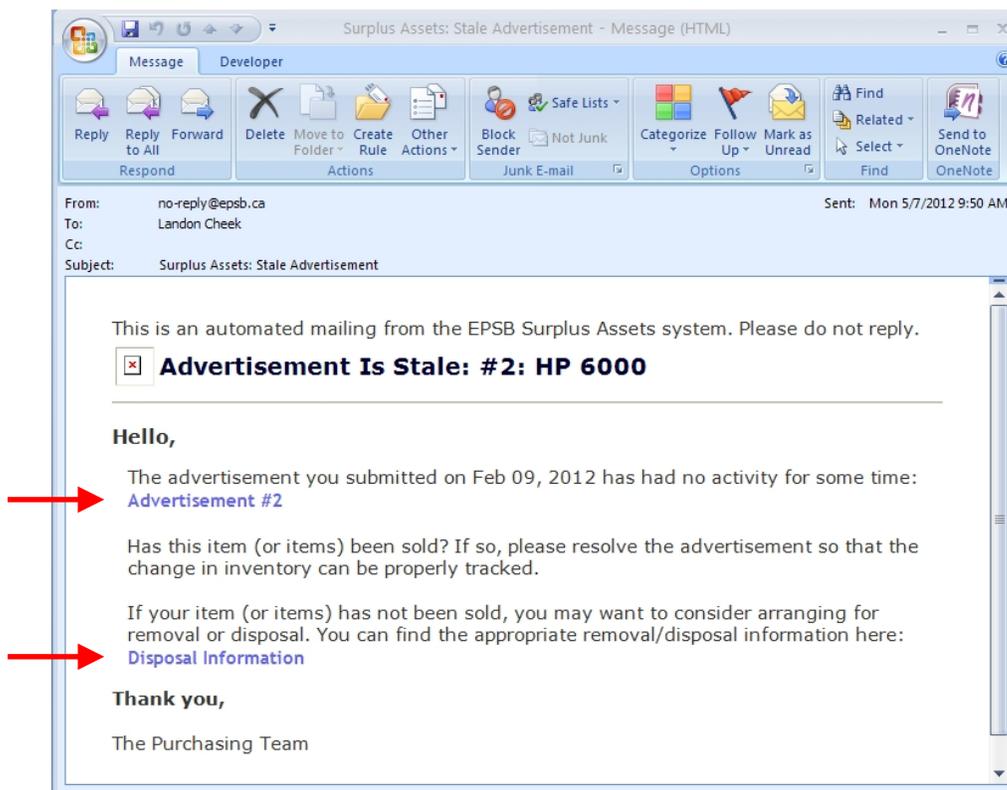
### Surplus Assets – Stale Advertisements

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An advertisement becomes stale after **3 weeks** with no activity.

Surplus Assets will send you a reminder email to notify you that the item is still available on the website and you will be asked to update.

The email will look like this:



To make changes or resolve the ad, click on the **Advertisement** link.

- If you decide to continue posting the ad, you can now sell it outside the District or to staff members.
- **Contact Purchasing and Contract Services to post the ad to the external website.**
- If you wish to dispose of the item, click the link titled "**Disposal Information**". This will bring up the **Facilities Maintenance Disposal Authorization Form (Appendix iv)** to print, complete, and send to Purchasing.
- Once the item is removed from school property, resolve the advertisement and Surplus the item in SAMS.