



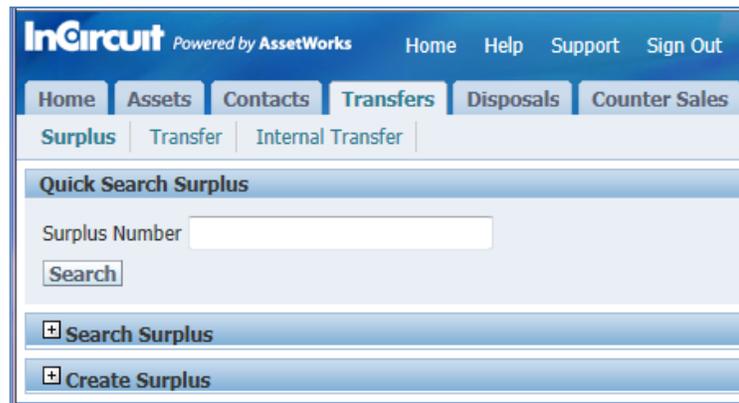
User Guide for AMS Surplus, Disposals and Transfers

All SD1s/Transfers are only open until midnight of the day they are started. After that, assets cannot be added to the SD1. If you need to add more assets to the SD1, you will need to create a new SD1.

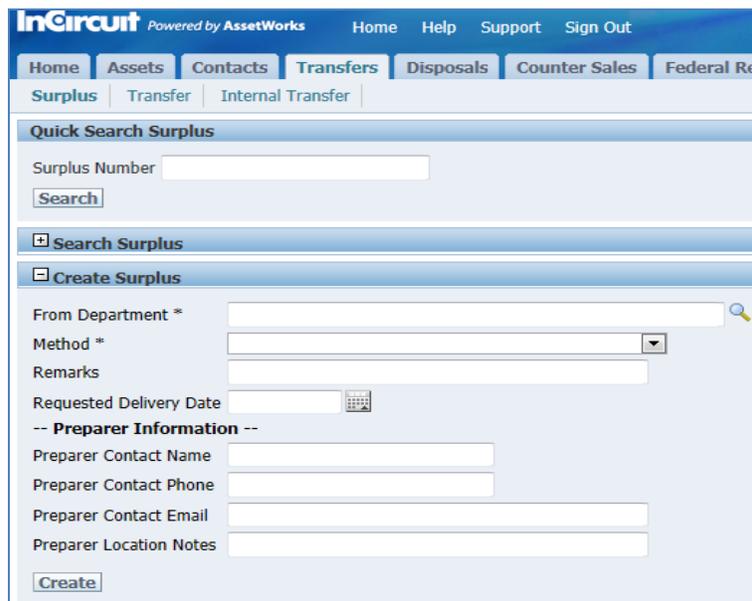
SURPLUS

Creating a Surplus Transfer:

To create a Surplus Transfer, click on the Transfers tab. The system automatically defaults to Surplus.



Click the Plus sign next to Create Surplus



AMS Surplus and Disposal Transfers

From Department – The user’s organization (department/agency) will auto-populate unless the user creating the surplus has more than one organization assigned. If you have more than one department in your User Profile, choose from the menu to select the correct department transferring from, or type the two digit department number for the system to auto-fill with the full department name.

Method –Users will have a drop-down of choices. For a normal Surplus transfer, select State Surplus. If Surplus has agreed to sell your item on site, then select As Is Where Is. This would be for larger items that would be costly to transport to State Surplus, or you are relocating and want to sell all assets at a particular location. Contact Surplus for this option prior to completing the SD1. The option of State Direct Transfer could be a transfer to one of Surplus’ approved vendors or to a school. Unless your Agency’s Code sections allow you to donate directly to a school, (such as with the Department of Education) then the transfer has to go through Surplus.

Enter any other required fields and/or optional fields that are needed. If you are a non-state agency please enter all information. Then click the **Create** button.



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Quick Search Surplus	
Surplus Number	<input type="text"/>
<input type="checkbox"/> Search Surplus	
<input type="checkbox"/> Create Surplus	
From Department *	<input type="text" value="07-State Auditor's Office (07)"/>
Method *	<input type="text" value="State Surplus"/>
Remarks	<input type="text"/>
-- Pickup Information --	
Preparer Contact Name	<input type="text" value="auditor2"/>
Preparer Contact Phone	<input type="text" value="334-242-7010"/>
Preparer Contact Email	<input type="text"/>
Preparer Location Notes	<input type="text"/>

[\[Create\]](#)

AMS Surplus and Disposal Transfers

The system will automatically assign a Surplus SD1 number. **Write down the Surplus Number** as you will need it later when running the report.



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SurplusTransfer

Successfully created Surplus Transfer.

Surplus Detail

Surplus Number	<input type="text" value="133044"/>
Method	<input type="text" value="State Surplus"/>
From Department	<input type="text" value="07 - State Auditor's Office (07)"/>
From Person	<input type="text" value="AUDITOR2, AUDITOR2"/>
Remarks	<input type="text"/>
-- Pickup Information --	
Preparer Contact Name	<input type="text" value="auditor2"/>
Preparer Contact Phone	<input type="text" value="334-242-7010"/>
Preparer Contact Email	<input type="text"/>
Preparer Location Notes	<input type="text"/>

Add Assets

Asset Number *

Assets

There are no assets on this surplus.

Now the user is ready to add the assets to the SD1 that will be transferred to State Surplus. Under Add Assets, key in the asset number in the box above the Add Asset button, then click the Add Asset button. Vehicles need to be on a separate SD1. Assets over \$500 need to be together, and assets under \$500 need to be listed on a separate SD1. If your under \$500 assets are not being tracked in Asset Works, then you will click the link under the Add Asset Button that says Create New Asset. The system will bring up another screen and automatically assign numbers for non-tagged assets. Users continue this process until all assets have been added to the Surplus Transfer.

AMS Surplus and Disposal Transfers

Click the Create New Asset link to add non-tagged assets under \$500 to the Surplus transfer.

Repeat the process for all property that is being sent to Surplus. Note: multiple quantities are allowed. If you are a State Agency, do not spend a lot of time trying to figure out the cost or acquisition date of items under \$500. Non-tagged assets under \$500 do not get reimbursement back to the agency.

View	Asset Number	Description	Qty Sent	Qty Rcvd	Service Charge	Status	Receiver	Recv Date
	101-0001042	SHREDDER PAPER	1	1	\$500.00	Received	DEVELOPMENT, INCIRCUIT	08/15/2011
	101-0001120	LENS TELEPHOTO	1	-	-	In Transfer	-	-
	101-S000001-NT	other	1	-	-	In Transfer	-	-
	101-S000002-NT	keyboards	15	-	-	In Transfer	-	-

AMS Surplus and Disposal Transfers

After entering all assets you will need to print the SD1. Click the Print Detail button. A new screen will appear with your SD1. You may have to install Crystal Reports or install ActiveX to get the SD1 to print. This is safe to install on your computer.

Successfully received assets.

Surplus Detail

Surplus Number: SP110542
Method: CJ-Computer/Telecomm Transfer to Surplus Property
From Department: 101 - GOVERNOR'S OFFICE
Remarks:
Requested Delivery Date:
-- Preparer Information --
Preparer Contact Name:
Preparer Contact Phone:
Preparer Contact Email:
Preparer Location Notes:
[Edit](#)

Add Assets

Asset Number * [Add Asset](#)
[Create New Asset](#) [Transfer by Filter](#)

Assets

View	Asset Number	Description	Qty Sent	Qty Rcvd	Service Charge	Status	Receiver	Recv Date
	101-0001042	SHREDDER PAPER	1	1	\$500.00	Received	DEVELOPMENT, INCIRCUIT	08/15/2011
	101-0001120	LENS TELEPHOTO	1	1	\$100.00	Received	DEVELOPMENT, INCIRCUIT	08/24/2011
	101-S000001-NT	other	1	1	\$8.00	Received	DEVELOPMENT, INCIRCUIT	08/24/2011
	101-S000002-NT	keyboards	15	15	\$5.00	Received	DEVELOPMENT, INCIRCUIT	08/24/2011

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[Cancel](#) [Remove Asset](#) [Receive](#) [Print Labels](#) [Print Detail](#)

Another option to print the SD1 is to Click on Reports Tab.

Surplus Search

Home Help Support Sign Out

Home Assets Contacts Transfers Disposals Counter Sales Federal Receipts Federal Donations Live Auction Approvals Users Admin **Reports**

Surplus Transfer Internal Transfer

Quick Search Surplus

Surplus Number
[Search](#)

[Search Surplus](#)
[Create Surplus](#)

Click here

AMS Surplus and Disposal Transfers

You will get a listing of all reports. Choose Transfer Reports. Reports are in alphabetical order, so it is the close to the bottom of the Report list under the Category of All Reports.

The screenshot shows the InCircuit Reports page. The left sidebar has 'Transfer Reports' highlighted. The main table lists various reports, including '00 - State Active Assets', 'ADEM Accounting Report', 'ADEM Scan', 'Account Eligibility', 'Account Report', 'Accounts by County', 'Asset Report (by Asset Number)', 'Asset Report (by Bar Code)', 'Asset Report (by Location)', 'Asset Report (by Serial Number)', 'Asset Report with Bar Code, Make, Model', 'Asset Report with County, Building, Room', 'Asset Report with Make and Model', 'Asset Report with Make, Model, PersResp', 'Assets by Agency Fund', 'BS Account Report', 'Bar Code Search', 'Comptroller Summary', 'Comptroller Summary \$5000', 'Comptroller's Activity List', 'Comptroller's Class Report', 'Comptroller's Class Report - \$5000', and 'Comptroller's State Fund & Activity Report'.

Then select Transfer Report by clicking on the red arrow. Note: if you click on the square box with the pencil you will get the option to edit the report.

The screenshot shows a filtered view of reports. A red arrow points to the 'Transfer Report' row. The table contains the following data:

Run	Edit	Report Name	Report Desc	Report Type
▶	✎	00 - State Active Assets	00 - State Active Assets	Native
▶	✎	Open Transfers	List of open transfers, including assets on each transfer	Extension
▶	✎	Transfer Report	Transfer receiving invoice by Transfer No.	Extension
▶	✎	Warehouse Bulk Item - Transfer Report	List active assets with transfer info in warehouse that have a bulk location code	Extension
▶	✎	Warehouse Bulk Items - List & Quantity	List of bulk items and quantity, grouped by warehouse	Extension
▶	✎	Warehouse Labels by Asset Number	Labels for items in ADECA warehouse for specified asset numbers	Extension
▶	✎	Warehouse Receipt Report	List of all assets received into the warehouse during a specific date range	Extension

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AMS Surplus and Disposal Transfers

Once you click on the red arrow you will get a screen that asks for your transfer number.

This is the number you wrote down when you created the Transfer to Surplus. You will need to print two copies - one for your files and one for Surplus. Please sign in the Released By field. Take both copies with you to Surplus to obtain their signatures. Once you have a **signed** copy, it is your **responsibility** to send a copy to the State Auditor's Office. State Surplus no longer sends copies to the Auditor's Office. Surplus is responsible for receiving the items in the system which causes the asset numbers to change from In Transfer to Inactive once processed. Keep in mind, Vehicles take longer to process and are not cleared until Surplus sells the vehicle.

STATE OF ALABAMA
DEPARTMENT OF ECONOMIC AND COMMUNITY AFFAIRS
SURPLUS PROPERTY DIVISION
NON-CONSUMABLE PERSONAL PROPERTY

RECEIVING INVOICE

STATE AUDITOR NO: 113261 DATE: 10/9/2011 2:21:52PM

TRANSFERRED FROM: Department of Conservation (11)	TRANSFERRED TO: Surplus (00)	FOR SURPLUS PROPERTY DIVISION USE ONLY
		TRANSACTION NO

ITEM#	PROPERTY#	SERIAL#	DESCRIPTION	BAR CODE #	ACQUISITION COST	COND	QTY SENT	FUNDING INFORMATION		FINAL DISP
								% STATE	% FED	
1	11-000339		GENERATOR ELECTRIC KOHLER/CT6R61	01102286	\$1,125.00	Good	1			
2	11-001375	1324176	MOTOR OUTBOARD 10HP	011001375	\$198.00	Good	1			
TOTAL ACQUISITION COST:					\$1,323.00					

FUND AND/OR ACCOUNT PROPERTY WAS PURCHASED THROUGH:

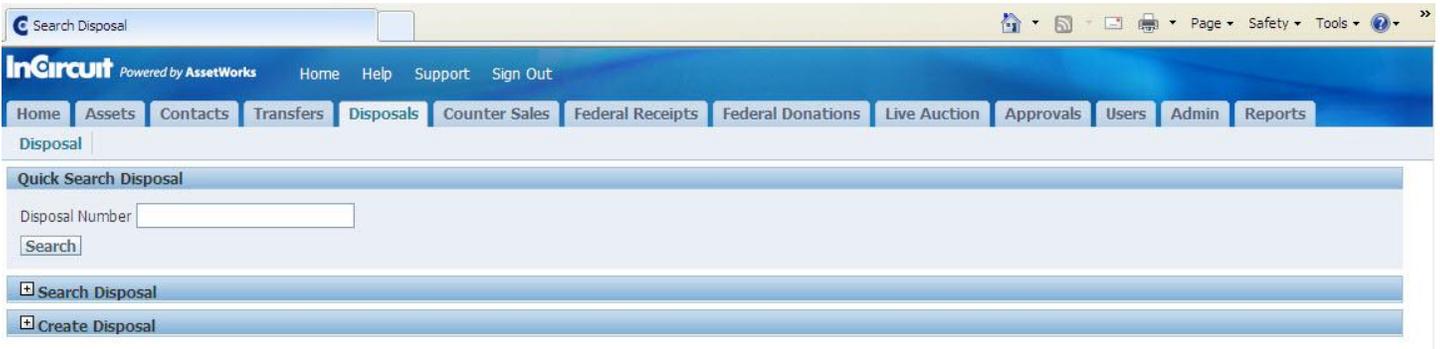
Approved: _____ Released by: _____ Received by: _____

CHIEF, SURPLUS PROPERTY DIVISION _____ _____
SIGNATURE SIGNATURE

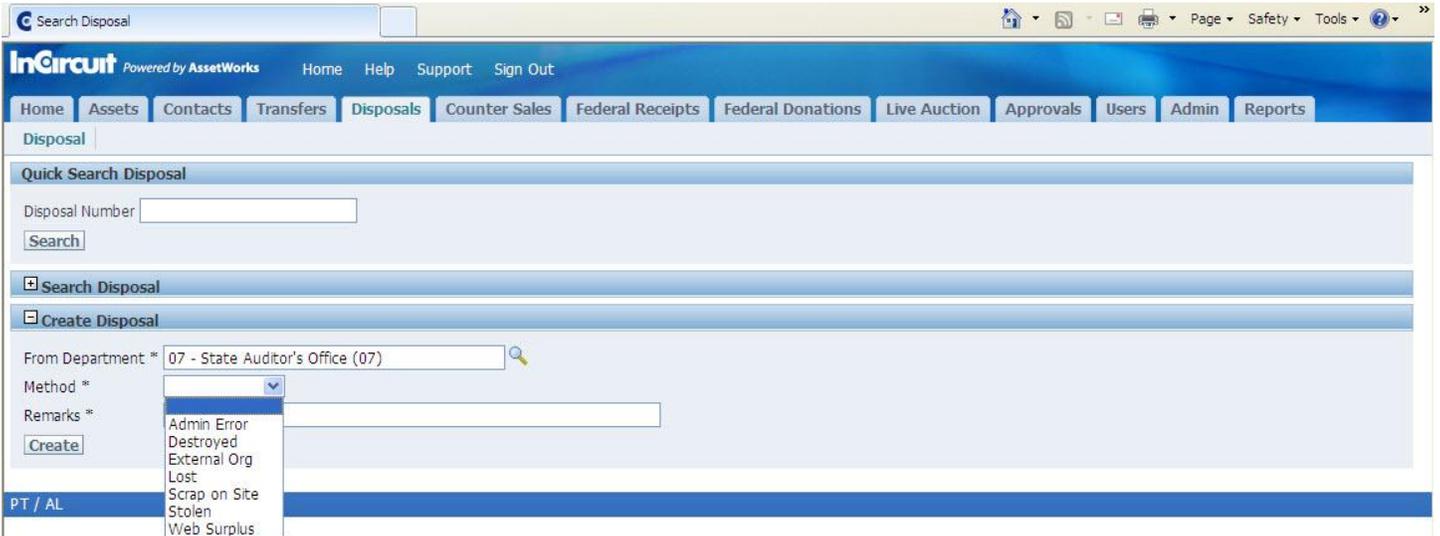
DATE TITLE TITLE

Creating a Disposal:

To create a Disposal, click on the Disposal tab:



Click the Plus (+) sign next to Create Disposal.



From Department – The user’s organization (department/agency) will auto-populate unless the user creating the disposal has more than one department assigned under their User Profile. In this case, type the two digit department number, and the system will bring up your correct selection.

Method - Users will have a drop-down of choices. **NOTE:** Method of Stolen requires a Police report and Lost or Destroyed requires an incident report/memo from the Person Responsible. If the method is Destroyed, then depending on the incident, attach a copy of the Fire Report, Accident Report, or in the case of a natural disaster, some type of internal incident report should accompany the SD1 when sent to the State Auditor’s Office. Both Lost and Stolen need to have a memo from the Agency Director/Commissioner with a determination of Negligence or Non-Negligence. Refer to State Auditor’s Office Property Manual for additional information and examples.

AMS Surplus and Disposal Transfers

Enter any other required fields and/or optional fields that are needed. If you are a Non-State Agency, please enter all information. Then click the Create button. **Write down the Disposal Number** as you will need it later on when running the report.



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Disposal

Disposal Detail

Disposal Number	133045
Creation Date	05/02/2013
From Department	07 - State Auditor's Office (07)
From Person	AUDITOR2, AUDITOR2
To Department	Disposal - Disposal
Method	Stolen
Remarks	Stolen from Capitol

Add Assets

Asset Number *	<input type="text"/>
Proceeds	<input type="text"/>
Disposal Date *	05/02/2013 <input type="text"/>

Assets

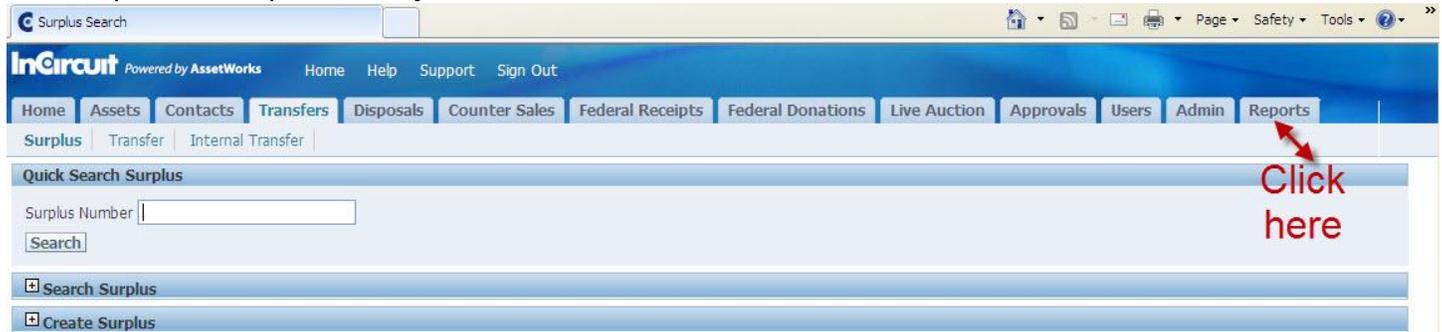
View	Asset Number	Description	Status	Proceeds	Receiver	Disposal Date	Comments	Docs/Images
	07-000823	HP PRINTER	Pending	-	-	05/02/2013	-	0

[Download](#)

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Users will either start typing in an existing asset in the Asset Number field, or they can click the Create New Asset button to create non-tagged assets under \$500. Users continue this process until all assets have been added to the Disposal. Once all items have been added to the Disposal, click the Print Detail button to print the SD1. As with printing the Surplus SD1, you can also go to the Reports tab, select Transfer Report, key in the Disposal number, and click Run, then print the SD1. Sign under Released By, forward to the State Auditor's Office for signature under Approved By along with any supporting/required documents. The State Auditor's Office will process the Disposal SD1 and assets will become Inactive.

AMS Surplus and Disposal Transfers

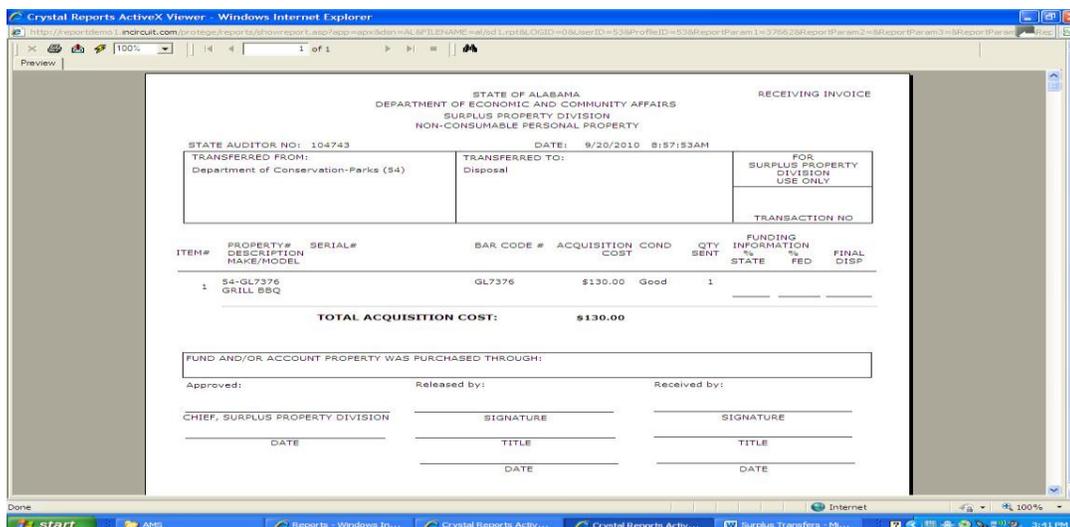


Type in the Disposal Number, and click Run.



This is the number you wrote down when you created the Disposal Transfer. You will need to print two copies - one for your files and one for the Auditor's Office. Please sign in the Released By field. **The Auditor's Office will sign/approve all disposals except Scrap on Site or Web Surplus.** Once you have a **signed** copy from Surplus for the Scrap on Site or Web Surplus, it is your **responsibility** to send a copy to the State Auditor's Office for processing. Before throwing anything in a dumpster that has been scrapped, remove all identifying barcodes or other markings indicating it is State equipment. If items are being scrapped and used for parts, they either need to be taken apart or some indication made that it is being used for parts so the Auditor's Office doesn't write it up as a New item when conducting their property audit.

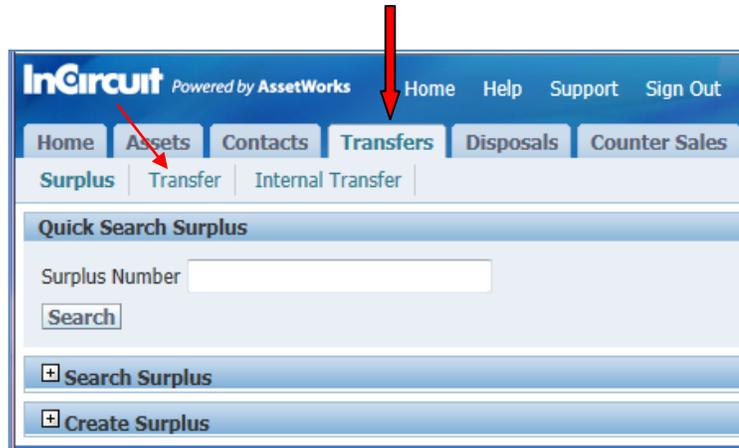
If the Disposal is a trade-in for weapons, a totaled vehicle titled to an insurance company, item donated to a Volunteer Fire Department, etc., the Disposal Method will be External Org. Someone at the receiving entity needs to sign under Received By.



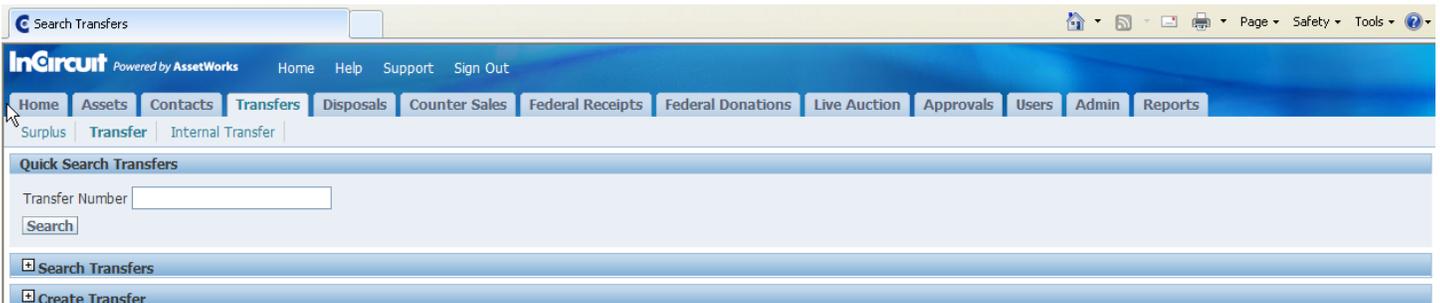
AMS Surplus and Disposal Transfers

Creating a Transfer to Another State Agency:

Click on Transfers – Transfer. Since the system automatically defaults to Surplus when you click the Transfers tab, you must select the smaller Transfer link under the Transfers tab for a transfer to another State Agency.

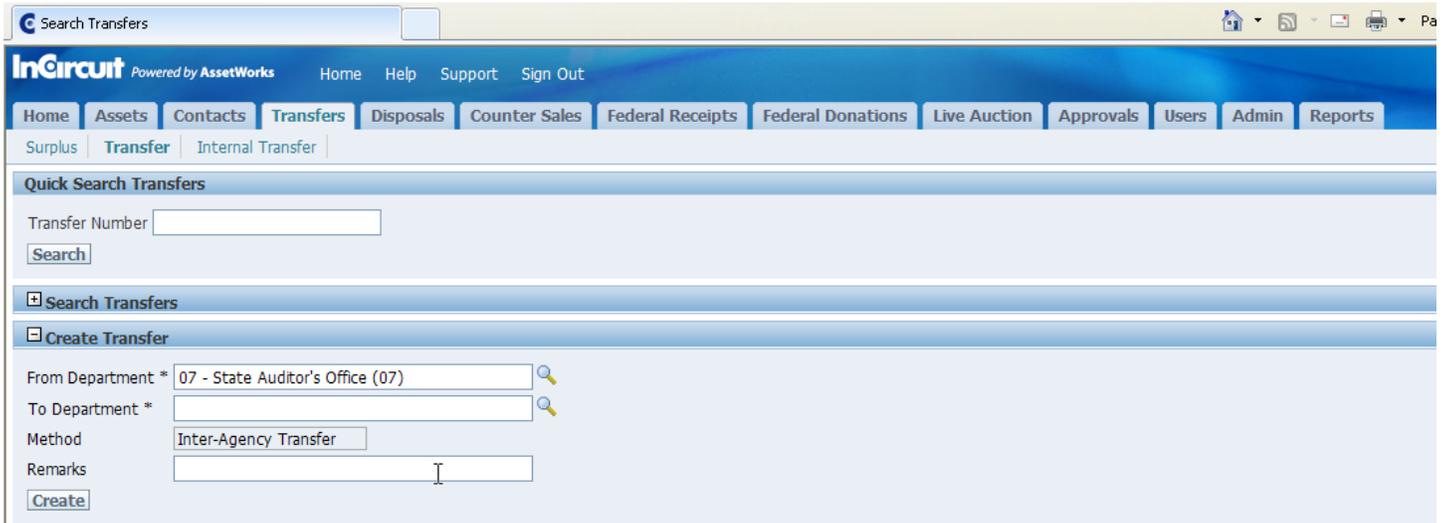


You will be able to search for a transfer or create a transfer.



AMS Surplus and Disposal Transfers

To create a Transfer to another State Agency/Department, click on the + next to Create Transfer.



The screenshot shows the InCircuit web application interface. At the top, there is a search bar labeled "Search Transfers" and a navigation menu with options: Home, Help, Support, Sign Out. Below the navigation menu, there are several tabs: Home, Assets, Contacts, Transfers, Disposals, Counter Sales, Federal Receipts, Federal Donations, Live Auction, Approvals, Users, Admin, and Reports. The "Transfers" tab is currently selected. Underneath, there are sub-tabs: Surplus, Transfer, and Internal Transfer. The main content area is divided into sections: "Quick Search Transfers" with a "Transfer Number" input field and a "Search" button; "Search Transfers" with a search icon; and "Create Transfer" with a plus icon. The "Create Transfer" section contains the following fields: "From Department *" with a dropdown menu showing "07 - State Auditor's Office (07)"; "To Department *" with an empty dropdown menu; "Method" with a dropdown menu showing "Inter-Agency Transfer"; and "Remarks" with an empty text input field. A "Create" button is located at the bottom left of the "Create Transfer" section.

Choose the department that you will be transferring the assets to in the To Department field. Some departments have multiple department numbers, such as Finance Divisions or DOT, and some Property Managers of smaller Boards have multiple Boards they are assigned. You need to call the Property Manager of each department to verify which department the assets will be transferring to.

AMS Surplus and Disposal Transfers

In the Asset Number field, key in each asset number being transferred. If you have assets under \$500 being transferred and are not in the database click on Create New Asset for non-tagged assets under \$500. The system will automatically assign the asset number.



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SurplusTransfer

Transfer Detail

Transfer Number	133046
Creation Date	05/02/2013
From Department	07 - State Auditor's Office (07)
From Person	AUDITOR2, AUDITOR2
To Department	10 - Banking Department (10)
Method	Inter-Agency Transfer
Remarks	

Add Assets

Asset Number

Assets

View	Asset Number	Description	Approval Status	Approval Date	Recv Status	Recv Date	Receiver
	07-000468	LOVESEAT, 66"	Approved	05/02/2013	In Transfer	-	-
	07-NT1418390	HP Laser printer	Approved	05/02/2013	In Transfer	-	-

[Download](#)

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When finished entering assets, click Print Detail to print the SD1 or go to the Reports Tab, click on Transfer Reports, key in the Transfer Number, then click Run. Print three copies of the SD1, sign under Released By, have the Property Manager of the receiving Agency sign under Received By. Both Property Managers keep a copy for their records and the third copy is sent to the State Auditor's Office for approval and processing. The receiving Property Manager needs to write their new property number(s) for each item on the SD1 before sending to the State Auditor's Office. This does not apply to assets under \$500. The Auditor's Office can sign transfers between State Agencies. (If Surplus signs, there could be a charge to the receiving agency)

STATE OF ALABAMA
 DEPARTMENT OF ECONOMIC AND COMMUNITY AFFAIRS
 SURPLUS PROPERTY DIVISION
 NON-CONSUMABLE PERSONAL PROPERTY

RECEIVING INVOICE

STATE AUDITOR NO: 113266

DATE: 10/11/2011 10:33:13AM

TRANSFERRED FROM: State Auditor's Office (07) 	TRANSFERRED TO: Banking Department (10)	FOR SURPLUS PROPERTY DIVISION USE ONLY
		TRANSACTION NO

ITEM#	PROPERTY# DESCRIPTION MAKE/MODEL	SERIAL#	BAR CODE #	ACQUISITION COST	COND	QTY SENT	FUNDING INFORMATION		FINAL DISP
							% STATE	% FED	
1	07-000823 HP PRINTER HP/2300DN		07000823	\$956.80	Good	1			
TOTAL ACQUISITION COST:				\$956.80					

FUND AND/OR ACCOUNT PROPERTY WAS PURCHASED THROUGH:

Approved:

Released by:

Received by:

 CHIEF, SURPLUS PROPERTY DIVISION

 SIGNATURE

 SIGNATURE

 DATE

 TITLE

 TITLE

 DATE

 DATE

TO RECEIVE A TRANSFER FROM ANOTHER STATE AGENCY:

DO NOT enter your new asset numbers as New assets. The only exception to this rule is if a State Agency received a transfer from DOT or a Non-State Agency. To correctly get the assets in the system for the Receiving Agency, the Property Manager will click on Transfers – Transfer – then enter the Transfer Number of the SD1.



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SurplusTransfer

Quick Search Transfers

Transfer Number

Search Transfers

Create Transfer

Transfers

View	Transfer Number	From Department	From Person	To Department
	133046	07 - State Auditor's Office (07)	AUDITOR2 AUDITOR2	10 - Banking Department (10)

[Download](#)

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Click on View. You will get a detail screen showing all the assets being transferred to your agency. Click on Receive. This will take you to another screen where you can enter your new asset number(s), change the Status to Received by clicking on the down arrow, then click Save. Non-tagged assets do not require an asset number. The asset will now be in your database and you will need to open that asset and enter all correct information (etc; barcode number, person responsible, county, building and room, activity code).

If you prefer, the State Auditor’s Office can also process the Transfer by following the same steps. That is why it is important for you to write your property number(s) for each asset over \$500 on the SD1. If you are not sure how to correctly process a transfer, it is best to allow the State Auditor’s Office to process it for you to avoid double work and corrections needing to be made.

NOTE: If you enter the transferred items as new assets, the Transfer cannot be processed in the system. If you have already entered the asset numbers as new assets in the system, when the State Auditor’s Office tries to process it, they will not be able to complete the Transfer. At that point, you will have to give the Auditor’s Office new asset numbers to process in the transfer. You will then be required to complete a new Disposal SD1, Admin Error, with “duplicate asset number” in the Remarks field. This creates double work, so PLEASE, DO NOT process a Transfer by entering assets as new in the system.

If you are ever not sure how to proceed and do something, please call the State Auditor’s Office for assistance. We are here to assist your any way we can. It is much easier to do it correctly the first time, than to have to double the work to make corrections later.