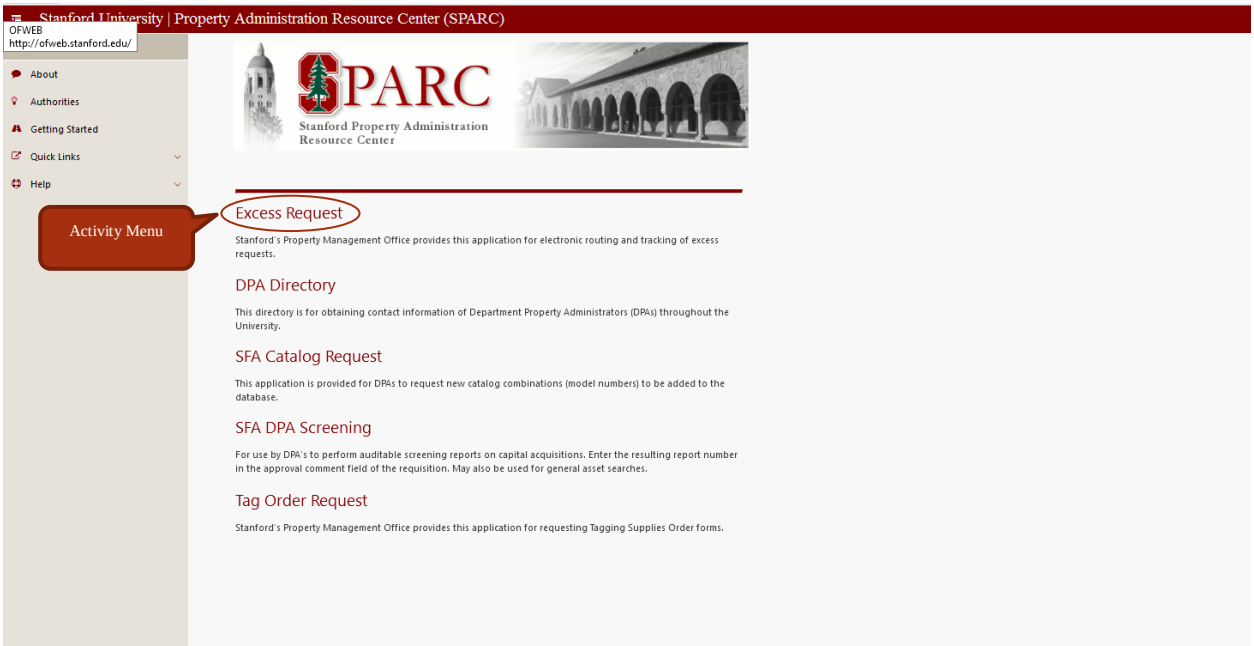
SPARC EXCESS REQUEST USER GUIDE

Instructions for disposing of property Stanford University property with or without a barcode

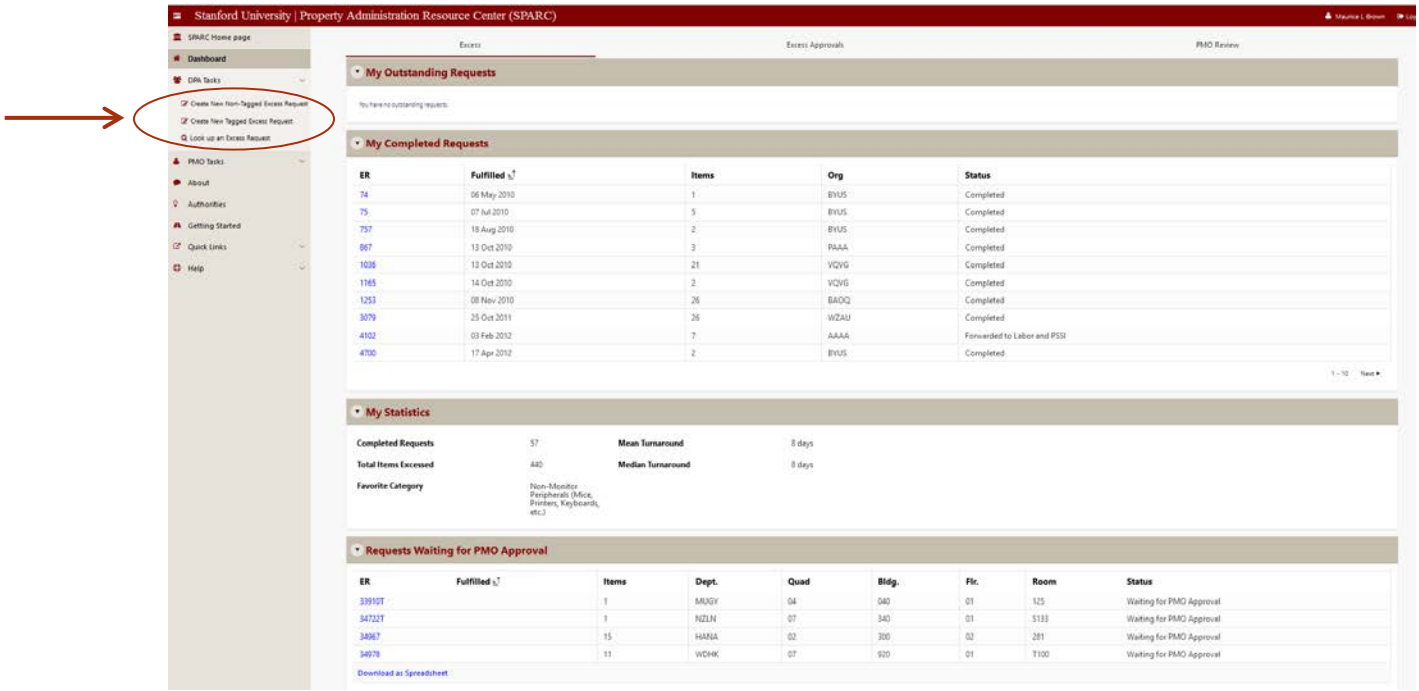
Log into https://sparc.stanford.edu



If this is the first time you have ever logged onto this application, there will be a one-page instructional introduction. Please read the information, it will provide you with some basic procedural rules.

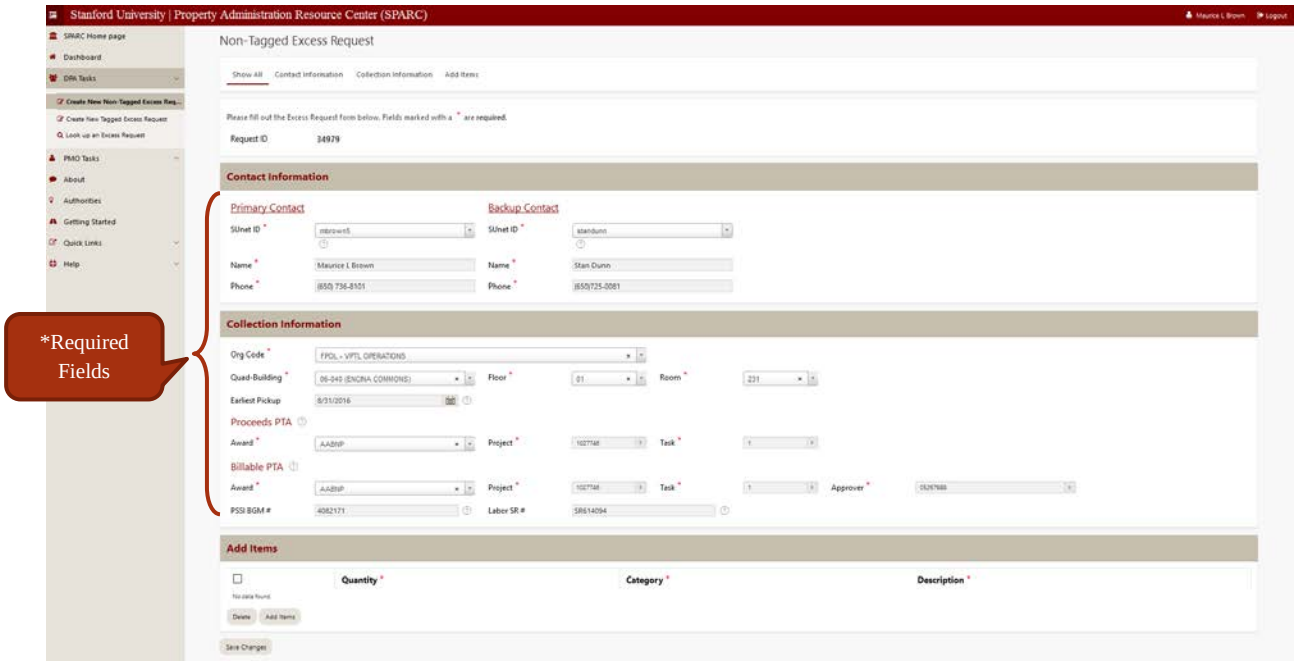
Once you select the activity you desire the available actions will show in the navigation column on the left side of the screen.

To create a new excess request, click on the link “Excess Request”



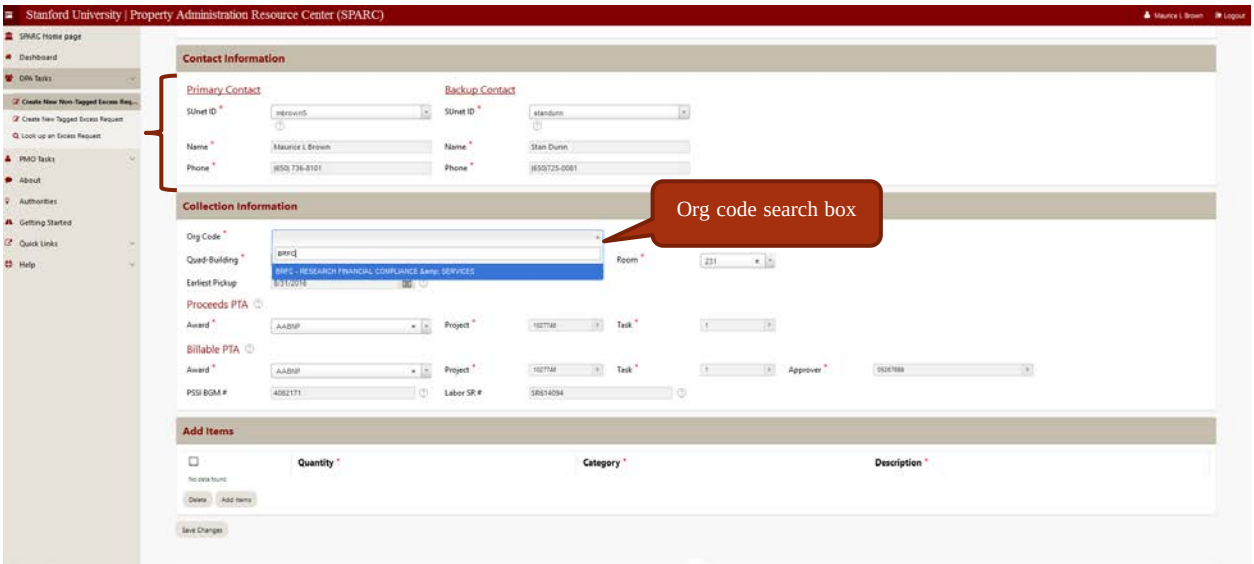
To initiate a new excess request simply click on the DPA task button and a drop down menu will appear. Available from here is the option to create a non-barcoded or barcoded excess request.

There is also an option look up an excess request. This is view only and no revisions can be made here.



If this is the first request you have made, the fields will all be blank. Subsequent times you log on, the Contact Information and Collection Information fields will be populated with the same information as the last request you created, and can be updated as desired.

Fields marked with an asterisk are required. The primary contact and backup contact names must be different. The primary contact person will receive all email notifications (successful submission of request, scheduled date when assigned, and completion, plus any additional notifications pertaining to the request). The backup contact will receive only the notification of when the request is scheduled for collection.



For contact names, the SUNet ID is required, and these name fields is equipped with a lookup tool which draws its information from the StanfordWho directory. Type in the last name of the person desired. The SUNet ID will appear in the list of values. (If there is more than one, select the first one listed.)

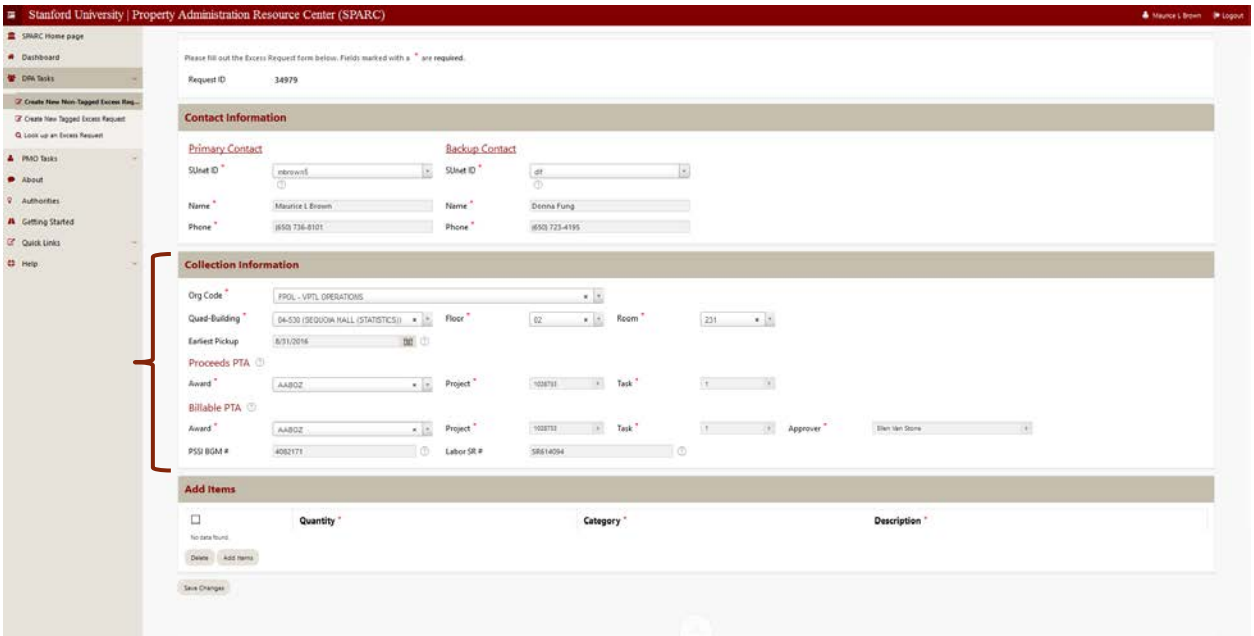
Click on the SUNet ID and the contact information will populate.

NOTE: If the person has marked their information in the directory as private view only, the auto populate feature will not work, please manually type in the information in that case, or copy/paste the data into the appropriate fields. More information on this feature is available by clicking on the [?] next to the SUnet ID operator.

Next, enter the department which the items are to be picked up. Department names are based on the org code. As you enter each letter of an org code, a list will appear of departments that match the string being entered, and will continue to narrow as each letter is entered. This step is not required for barcoded items because the SU.ID (barcode) are linked to the org code in Sunflower.

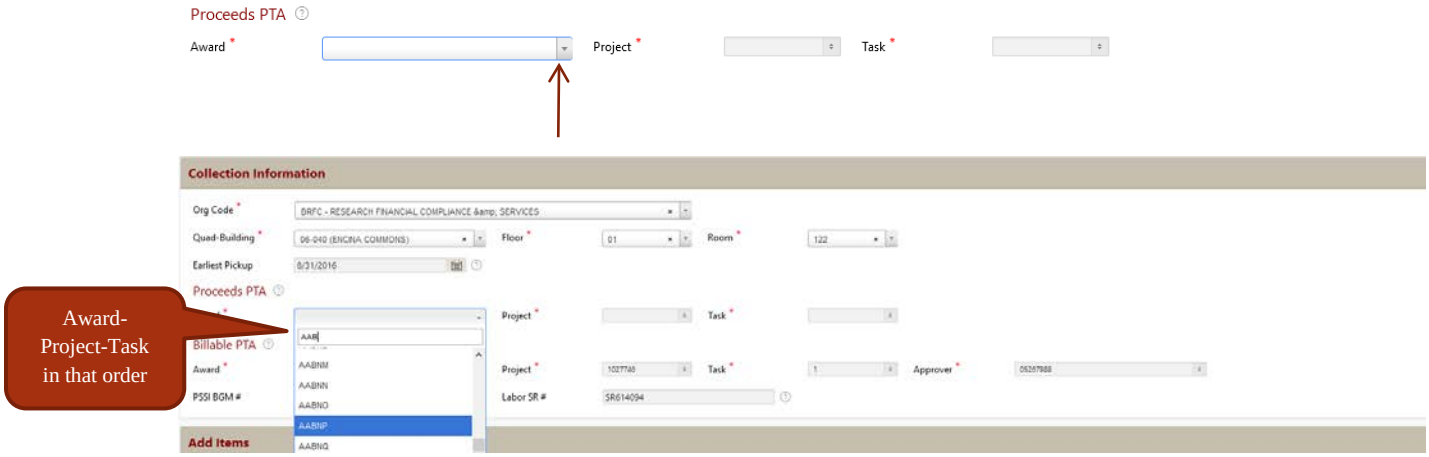
Once the department is entered correctly, enter the location. You must know the Quad-Building-Floor-Room of the location as it appears in the iSpace inventory. This is necessary to provide consistency and avoid miscommunication leading to delays. If you do not know the official designation of your location you can look it up on the Stanford Basemap online, or contact PMO for assistance. Building floor maps and queries

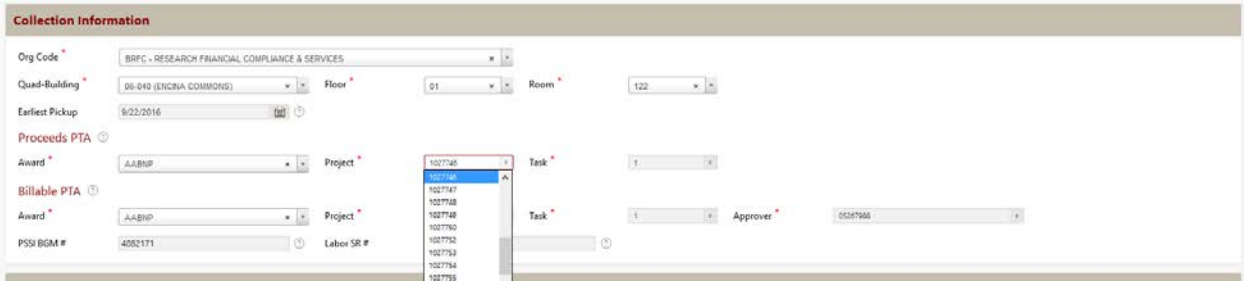
Please enter the earliest pickup date for which the items will be available. The application defaults to the following day, but if for some reason you do not want the items collected until after a specific date, change that using the calendar function.



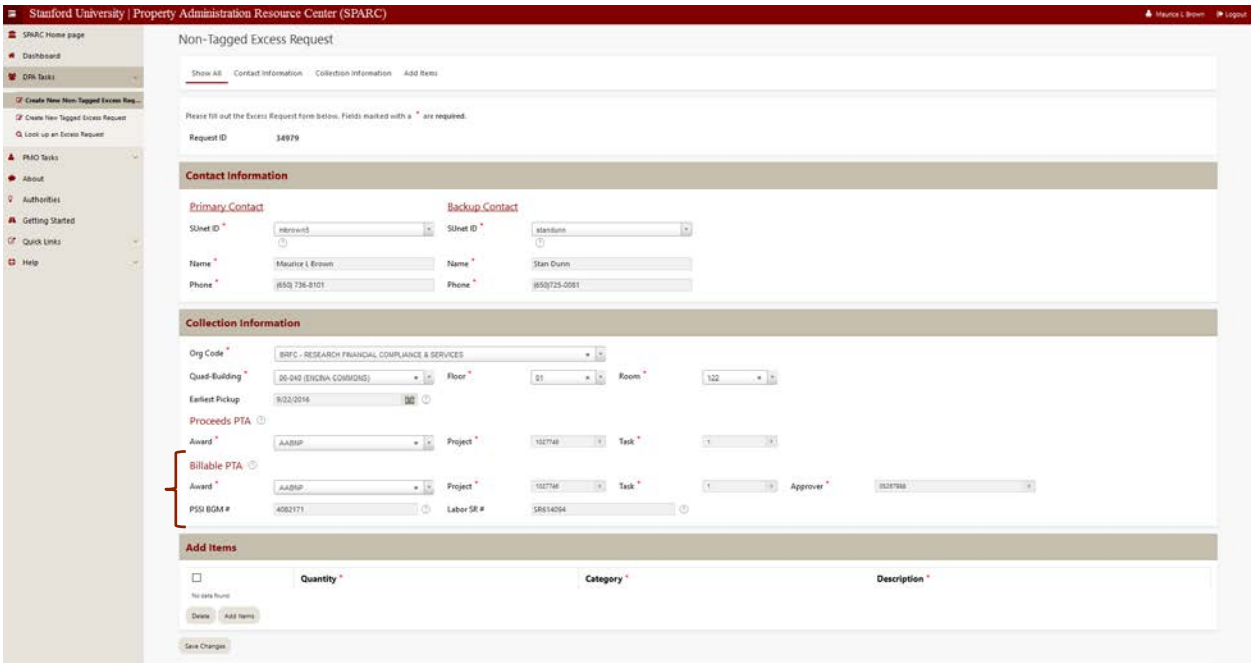
The fields for PTA information are now linked to the financial system, and SPARC requires a valid PTA to be included in all excess requests. The three PTA fields are 'nested', so you can select the Award you want to use, then the Project list of values will be limited to those under that Award, and the Task list will limit to those under that Project.

To search for each of these, simply click on the ▼ button to the right of the field, and a search box will open. Enter the award (or first few characters of the award), and select the award from the resulting list.

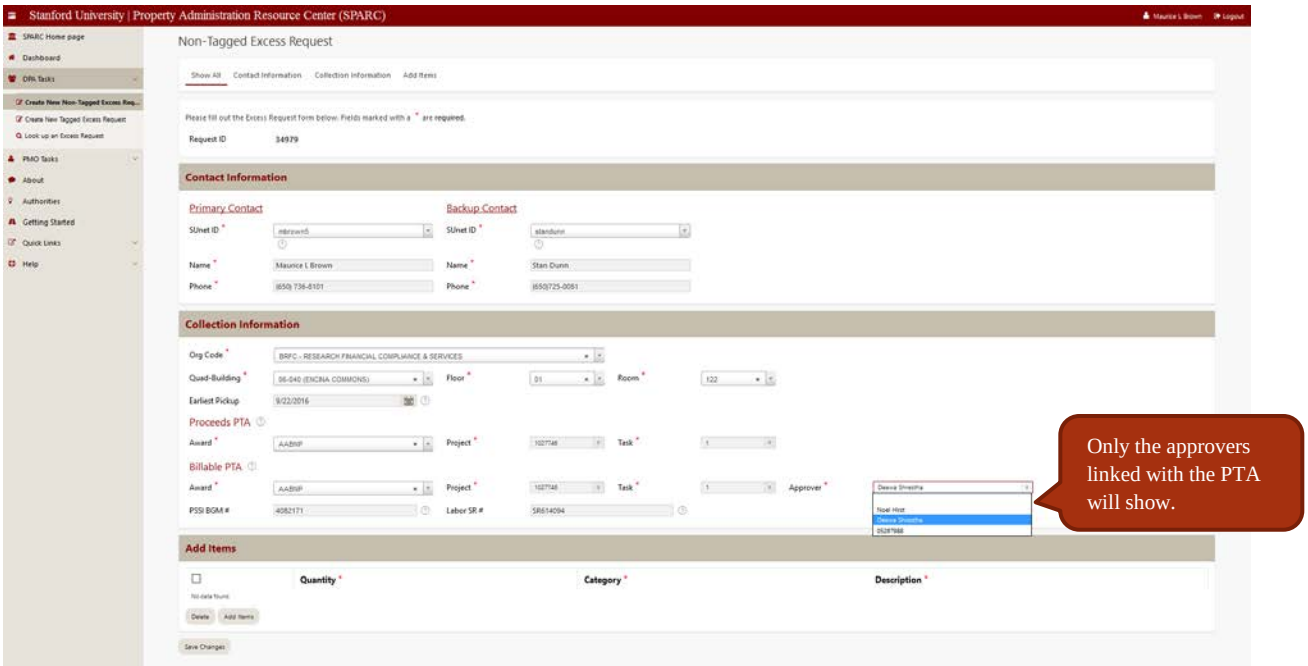




Follow the same steps for Project and Task. As stated, the list will be limited to the projects associated with the selected award, and tasks will likewise be limited to the selected project. Just click on the one you want.



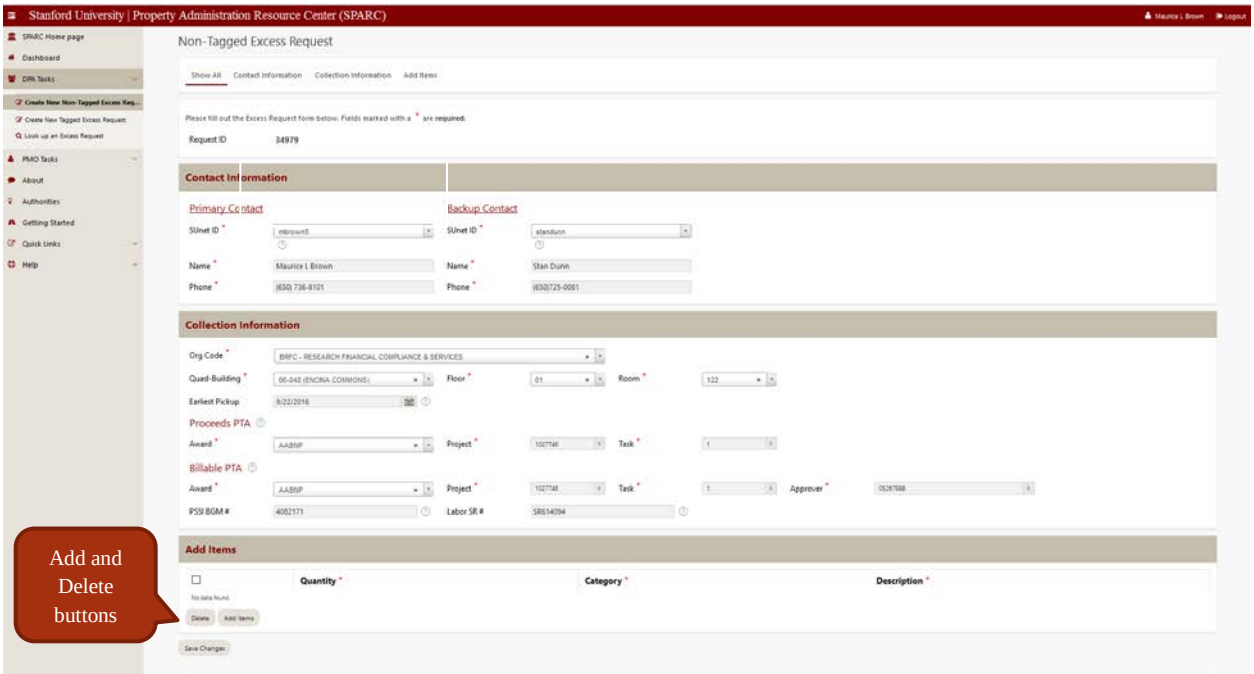
Billable PTA – 'What is this?' you ask. As part of the Business Affairs Mission Statement to alleviate administrative burden across campus when possible, PMO is willing to generate the necessary paperwork on your behalf. This means that **you no longer need to generate work orders for Event Services or PSSI unless you prefer to do so**. (The PTA fields are required, though, even if you complete your own work requests). Use the same method as above to select the Award, then the Project, then the Task. This information will remain stored so you don't need to re-enter this information in future requests unless the PTA to be used should be changed. PMO will take care of generating the work requests through the BGM web site as needed.



Once you have entered the 'Billable' PTA, select the Approver you would want any work orders sent to for approval. Click on the button and select from the resulting list of values:

Please be sure to include any special instructions to be passed along to Event Services and/or PSSI in the Notes field of the excess request.

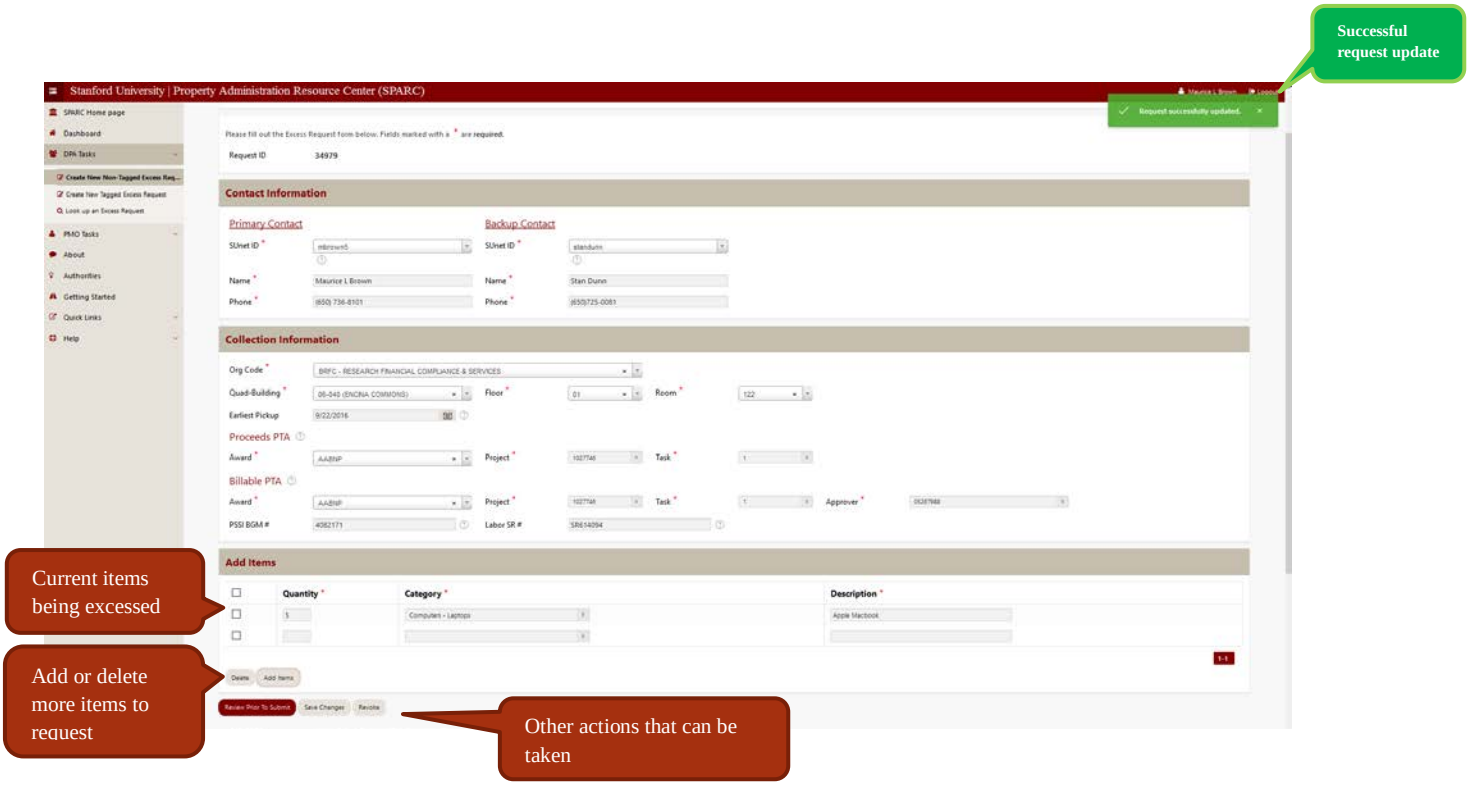
PLEASE NOTE: PMO will ONLY generate work orders to Event Services or PSSI when necessary, and obviously all orders will route to your department for financial approval. You may want to alert the approver you select so they are aware of the potential for work requests to reach their workflow queue. If a work request is rejected, please contact PMO to clarify whether the Excess Request should be cancelled or if other arrangements are being made (i.e. direct delivery to Surplus).



Click "Add Items" to start entering the items to be collected. Enter one line for each specific type of item (computers, laptops, printers, faxes, chairs, spectrophotometers, etc). There is a maximum of 20 items per line, and a total of 100 items per request. <u>Cables, cords, mice and keyboards can be placed in a box and listed as a single line item</u>.

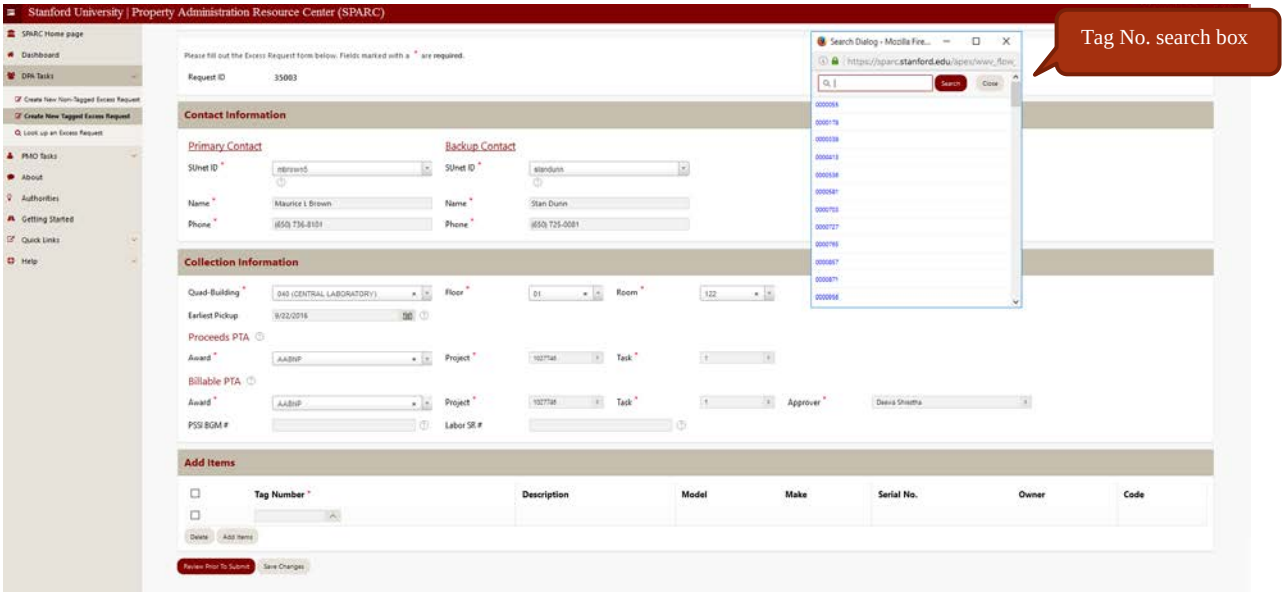
The more granularity you provide for description, the better. For example, manufacturer is helpful, or type of chair, or size of table or bookcase – this helps us understand the time and labor required for the pickup, and helps quickly identify the items at point of collection. While requests will not be rejected for lack of specifics, they may be returned for adjustment if unlike items are mixed on one line.

Once you enter the quantity, please use the pull-down menu to select the appropriate category. Please note that furniture, refrigerators and other chilling units follow a different pathway than other equipment and supplies, so the two cannot be combined on a single request, and the application will prevent this.

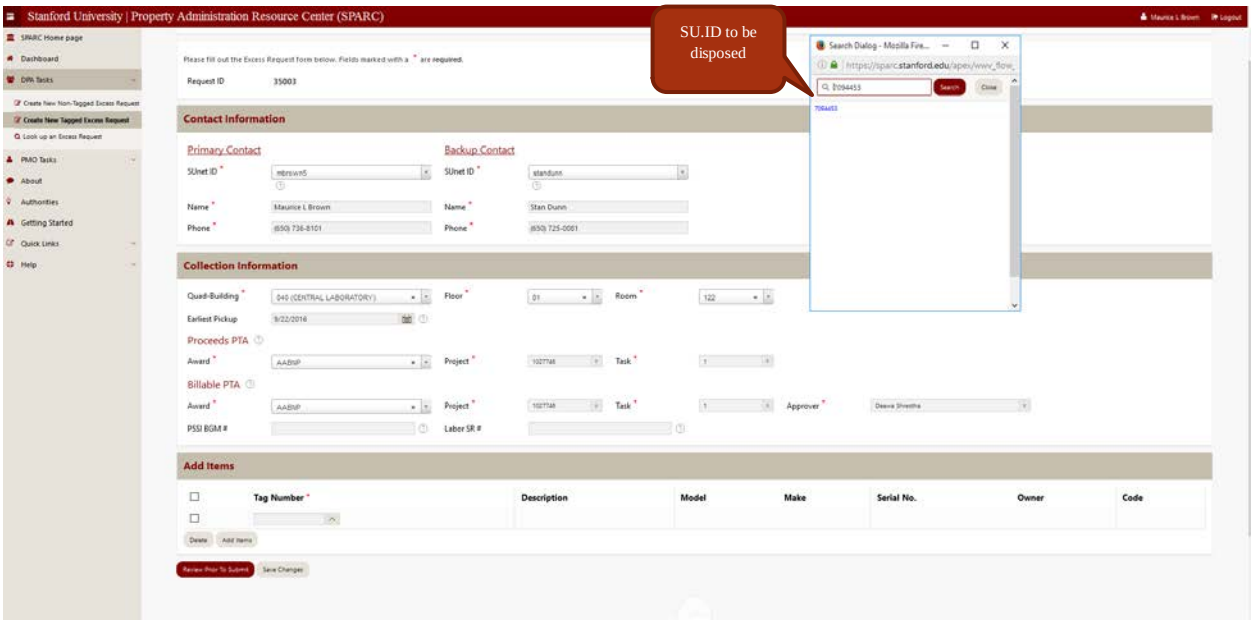


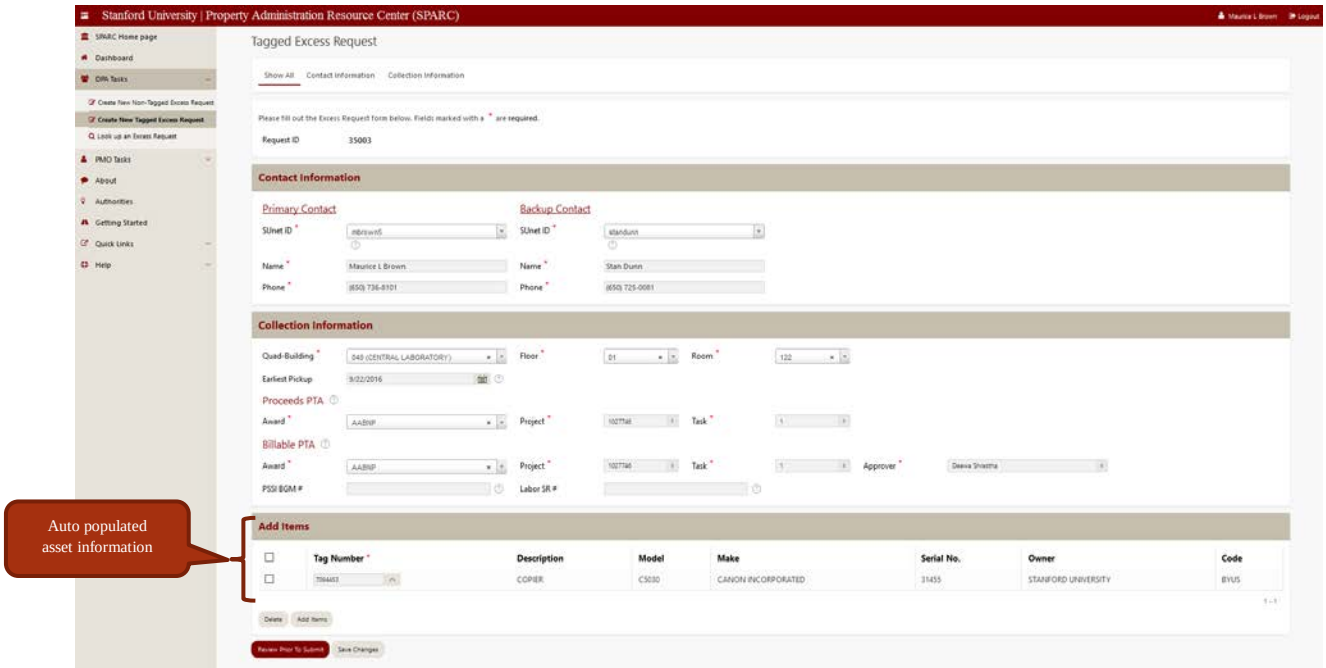
Once you have entered the quantity, category and description, Click ADD again and a new section is created showing the items you have entered for the line on the excess request. You may now save the request (the **green successful update** box appears if there are no errors) for later completion, revoke the request (to cancel it altogether) continue to add additional items, or if complete, click review prior to submit to continue with the submission of the request.

The previous page was a non-barcoded excess screenshot. This is a barcoded screenshot.



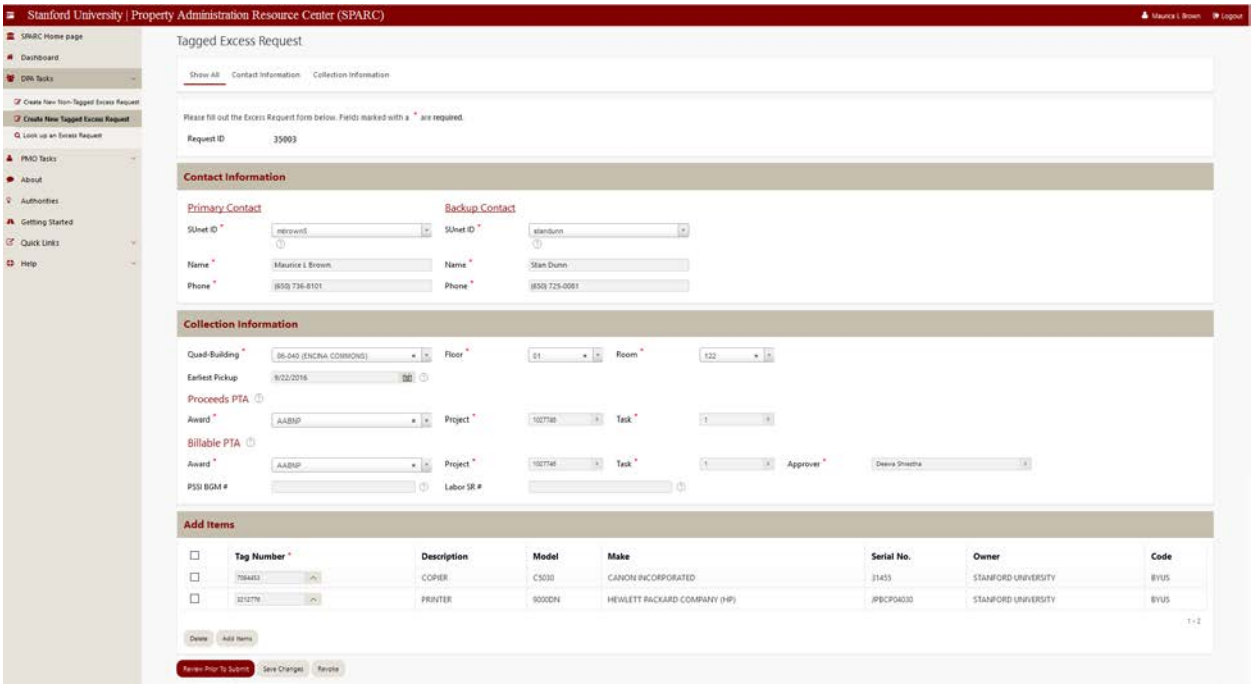
To submit a bar coded excess request select “Create New Tagged Excess Request”, fill out all the pertinent information such as contacts, location and PTA. Notice that there isn’t a org code search function, but a Tag No (SU.ID. search. Enter the SU.ID to be disposed and click on the search button and the single barcode you want to dispose will show.





Click on the barcode and asset information will appear in the 'Add Items" field. The org code, model, make, serial number and owner is provided for you. Once an SU.ID is selected for a particular org code then only those assets within that org code will appear in search dialog box. SU. ID's under a different org code will not appear in the search ID box therefore requiring a new excess request. Add items, review prior to submit, save changes and revoke remain available options as they were for non-barcoded excess requests.

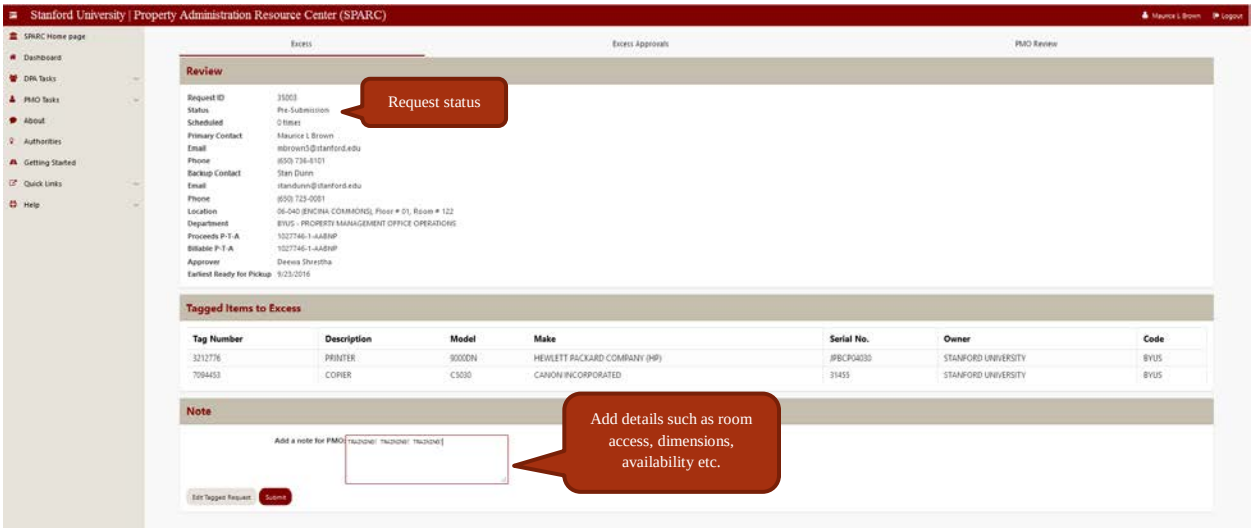
Note: Ownership is very important. Never dispose of an item that Stanford does not have title of without approval from the organization it belongs to. Always check with your UPA first.



Once you have added all the items for disposal on your request, review it for accuracy. You can change quantities or categories, descriptions, or remove entire lines as needed. To remove a line, simply check the box to the left of the line to be deleted, and click REMOVE SELECTED.

If the request is now complete and you wish to continue with the submission, click REVIEW PRIOR TO SUBMIT at the bottom right.

NOTE: There is still one more step!



You can now review the completed request to ensure all information is correct.

This is also where you can add notes for PMO – such as to call ahead to gain access to the room, provide more specific location or other information necessary to ensure the collection takes place efficiently.

To make changes now, click on EDIT REQUEST. Once satisfied that you have completed the request as desired, click SUBMIT. The request will now route to PMO for approval and scheduling, and you will see that you have made a successful request:

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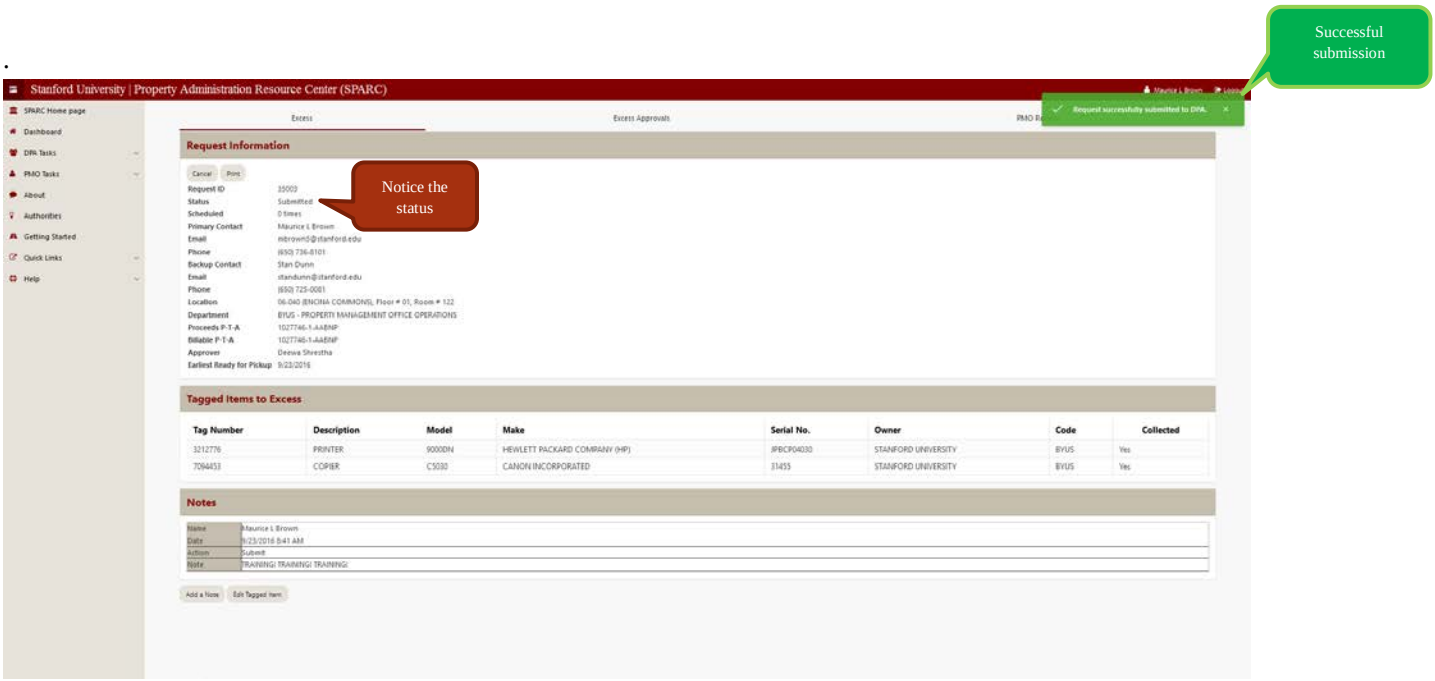
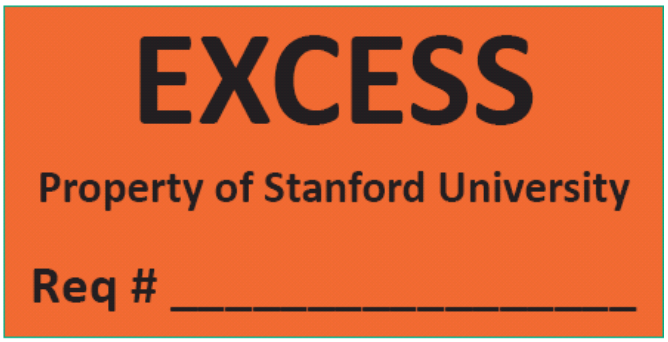


THE EXCESS LABEL

The final step for preparing your items for collection is to affix the Excess label to the items. Each item (or box of miscellaneous small items) must have the label affixed to it, and the request number written in. Please use a black marker to write in the Excess Request number

The labels are 2' x 4' and bright orange, designed to be visible to the collection crew at a glance when entering a location. Please make sure they are facing forward.

The label is self-adhesive and easily removed, so as not to damage the surface of the items to which it is affixed. It also identifies the item as Stanford Property – excess items are NOT available for students or staff to take.



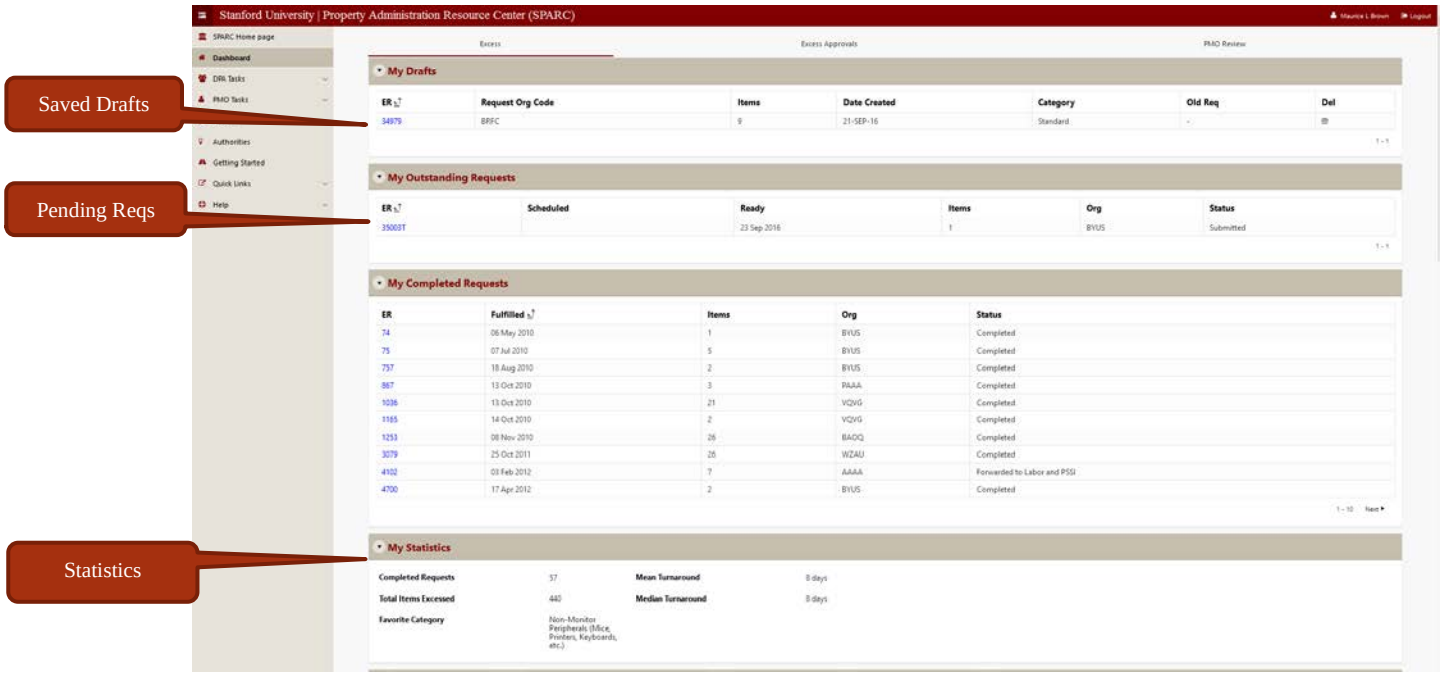
Failure to label the excess items may result in the items being left behind. The request may be rescheduled, or it may be terminated entirely by PMO. The volume of excess requests makes the labeling very important, please ensure you have an adequate supply on hand prior to generating your requests.

Labels can be ordered from PMO free of charge using the tagging supplies order form online at:

http://ora.stanford.edu/supporting_files/tags_order_form.pdf

ADDITIONAL FEATURES

Saved Drafts and Pending Requests – The DASHBOARD



If you have saved changes to a request but not yet submitted it, it will be saved on your dashboard under a section for MY DRAFTS. To continue working on it, simply click on the request number, and it will open so you can continue working on it.

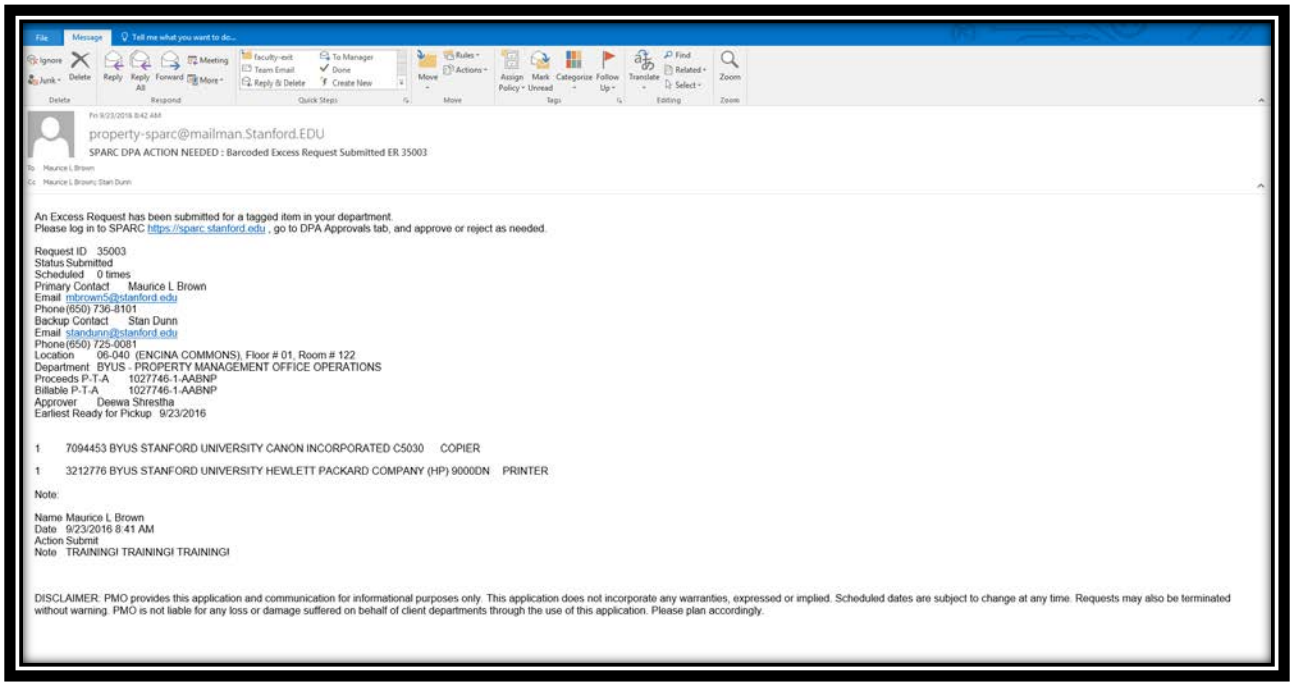
Pending requests that have not yet been scheduled by PMO can still be retrieved and edited (add items, delete items, contact info, etc) by clicking on the Edit link to the right of the request information. Once a request is scheduled, this function disappears.

As you continue using the application, it will store your completed requests, and provide you with data on the total number of requests created, items excessed, turnaround time between submission and collection, and even the most frequent category of items you have excessed.

Any request can be viewed by clicking on the request number. There you can find information regarding when it was scheduled or completed, or what items were involved.

EMAIL NOTIFICATIONS

When you successfully submit a request, the Primary Contact will receive an email notification to that effect. (As a result, you may want to either list yourself as the Primary Contact, or communicate with that person so they know what you are doing)



Fri 9/23/2016 8:42 AM

property-sparc@mailman.Stanford.EDU

SPARC DPA ACTION NEEDED : Barcoded Excess Request Submitted ER 35003

To Maurice L Brown

Cc Maurice L Brown; Stan Dunn

An Excess Request has been submitted for a tagged item in your department.
Please log in to SPARC https://sparc.stanford.edu , go to DPA Approvals tab, and approve or reject as needed.

Request ID 35003
Status Submitted
Scheduled 0 times
Primary Contact Maurice L Brown
Email mbrown5@stanford.edu
Phone (650) 736-8101
Backup Contact Stan Dunn
Email standunn@stanford.edu
Phone (650) 725-0081
Location 06-040 (ENCINA COMMONS), Floor # 01, Room # 122
Department BYUS - PROPERTY MANAGEMENT OFFICE OPERATIONS
Proceeds P-T-A 1027746-1-AABNP
Billable P-T-A 1027746-1-AABNP
Approver Deewa Shrestha
Earliest Ready for Pickup 9/23/2016

1 7094453 BYUS STANFORD UNIVERSITY CANON INCORPORATED C5030 COPIER

1 3212776 BYUS STANFORD UNIVERSITY HEWLETT PACKARD COMPANY (HP) 9000DN PRINTER

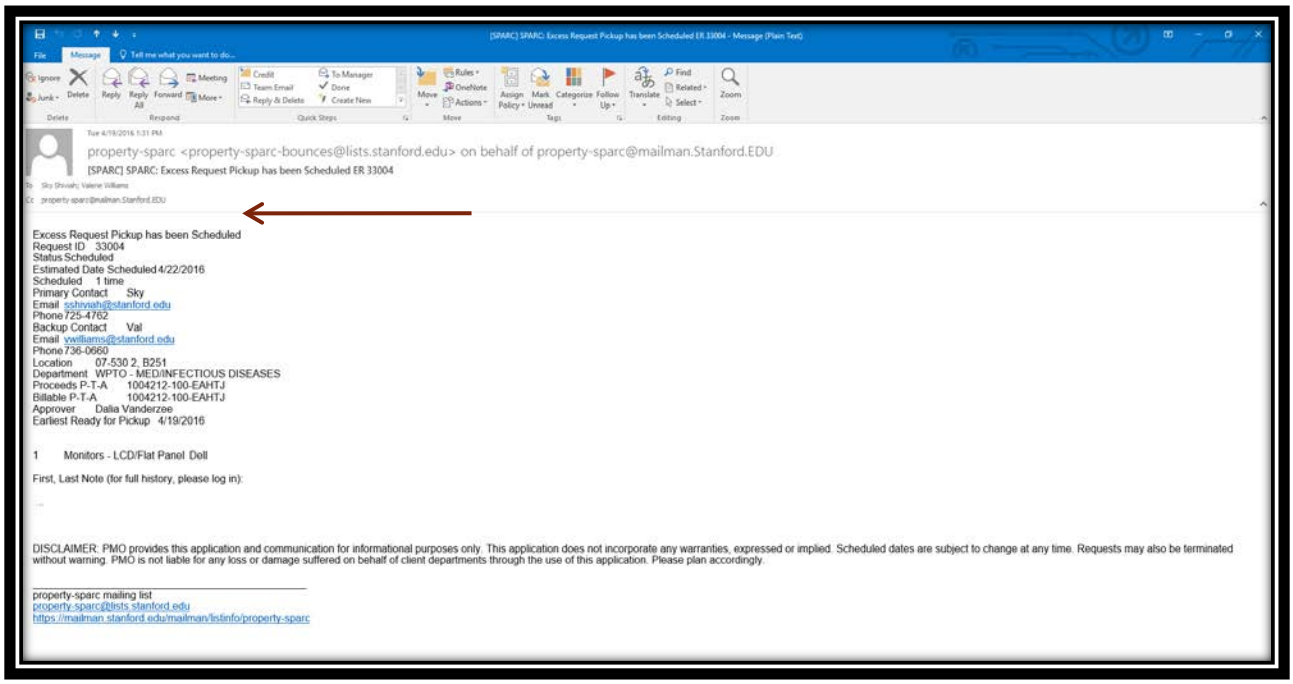
Note:

Name Maurice L Brown
Date 9/23/2016 8:41 AM
Action Submit
Note TRAINING! TRAINING! TRAINING!

DISCLAIMER: PMO provides this application and communication for informational purposes only. This application does not incorporate any warranties, expressed or implied. Scheduled dates are subject to change at any time. Requests may also be terminated without warning. PMO is not liable for any loss or damage suffered on behalf of client departments through the use of this application. Please plan accordingly.

The email will list the request information, including request ID number, the contacts, location and items submitted for collection. It will also include any notes you have added to the request.

Likewise, when PMO schedules the request for pickup, an email notification will be sent to both the Primary and Backup Contacts indicating the date scheduled:



Contact PMO immediately if there are significant conflicts with the date. We cannot provide exact times. Please ensure that one or both of the contacts will be available, especially if there are access issues with the location.

WORKGROUP MANAGER

This application may be made available to staff beyond the DPA. If you wish to have additional persons given access, please contact your University Property Administrator (UPA) in the Property Management Office, and such access will be granted. Access will be managed centrally through the Workgroup Manager, which is similar to the Authority Manager.

The Workgroup Manager will also be used for granting access to future applications developed and launched in the new SPARC system. Only applications for which authority has been granted will appear on the dashboard for each user.