

AS SURPLUS ECM Documentation

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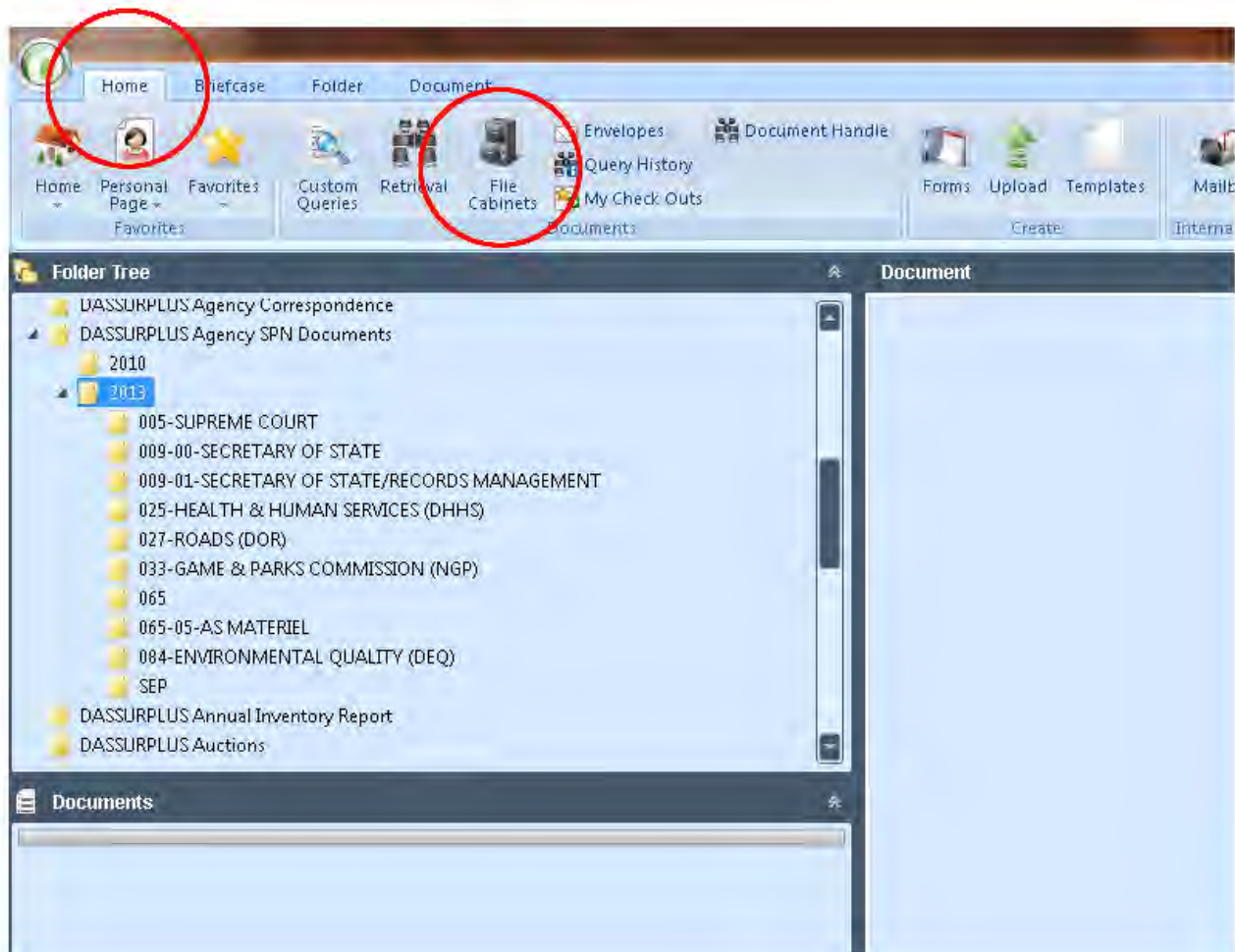
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File Cabinets, Keywords & Document Retrieval

File Cabinets

Some File Cabinets are provided for document storage. The file cabinets group the documents together into folders.

Click on the Home Tab, the File Cabinets icon.



The file cabinets will be displayed down the left side.

DASSURPLUS Agency SPN Documents contain the various SPN documents used by the State. It is Organized by Year, and then Agency. The various SPN documents are organized within each agency for that year. They are filed by Destruct, Adjustment, Trade-In, types of Recycling, Auction Month and Type, Pre-Auction Month and Type (Agency to Agency sale), and Political Subdivision Month and Type (Agency to Political Subdivision Sale).

Keywords

Right click on the document and choose keywords. Do not right click on the image. Keywords will display on the right, as shown here.

Keywords will display here

AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
000	001	Secretary of State-Records Mgmt	Margaret Bochy	471-9778 mbochy@state.nes.gov

# OF ITEMS (QTY)	DESCRIPTION	CONDITION
1	#0144 Extra 3700 Silver Duplicator	good
1	#1181 Wagon Sentalonster	good
1	#1836 Allen chemical mixing tank	good
1	#0255 chemical mixing tank	good
1	#1810 Film Jack Microase 35 mm	good
1	Legend Thermocable Water Meter Valves	good
2	16mm Film Canisters for Allen MFD	good
2	1000 1/2 film canisters for Allen F10	good
1	2000 1/2 film canister for Allen F10	good
1	3M Film Cleaner	good
1	3M 529 Film Cleaner	good
1	case NEG 35mm Kodak film	good

Keywords contain valuable information about the document. If you want to review all the information on a document, right click on the document, and choose KEYWORDS.

Other options that are available when you right-click on a document are to PRINT or SEND TO (or email) the document.

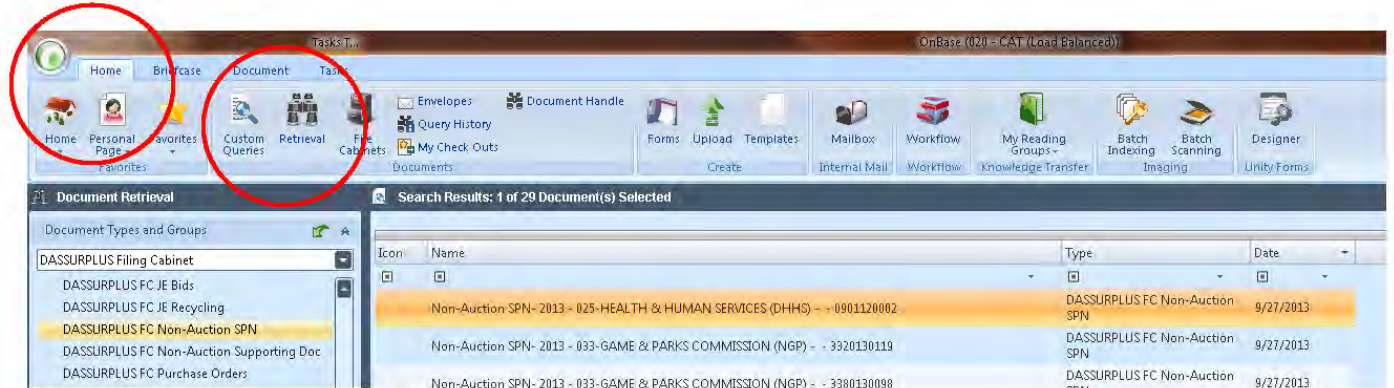
There are two ways to review documents that may or may not be in the workflow.

One is by Document Retrieval and the other is File Cabinets.

Document Retrieval

Document Retrieval allows you to search for one or more documents of a single type.

Click on Home Tab, Retrieval icon.

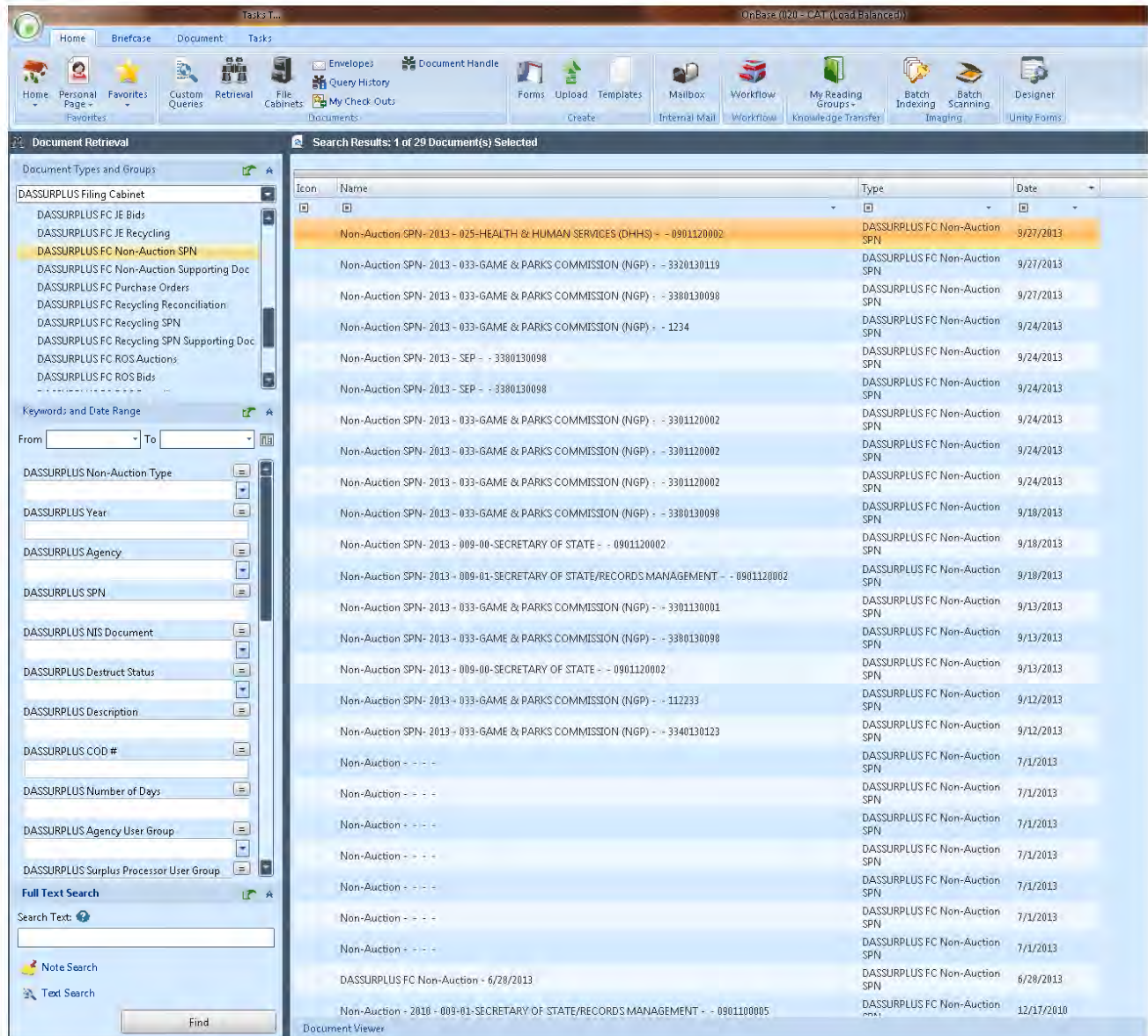


Enter DASSURPLUS Filing Cabinet as the Document Type Group.

Select the type of document you want to look for. In the above example, it is DASSURPLUS FC Non-Auction SPN. If you want to search multiple Document Types, click on the first Document Type and hold down the Ctrl key and choose additional Document Types. Ctrl needs to be pressed as you are making additional selections (i.e. DASSURPLUS FC Non-Auction SPN + Ctrl + DASSURPLUS Auction SPN + DASSURPLUS FC Recycling SPN for all SPN documents).

Enter in any keywords to help you find the document(s) you want to research, and click **FIND** at the bottom. You may also use partial word searches in the search fields utilizing the *(i.e. *650413* in the DASSURPLUS SPN field and you will obtain all SPN documents containing those numbers).

You can double-click on any of the documents to look at them further



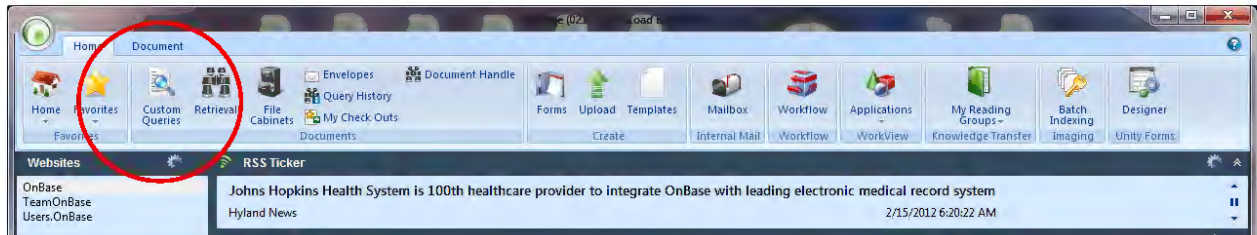
You can also right click on the results to determine which Filing Cabinet they are in by choosing Folder Locations or which Workflow Queue they are in by choosing Workflow and Workflow Queues.

Note: Wildcard character (*) can be used in the keywords when searching, except in the dropdown fields. For the dropdown fields, type in the first few characters, and use the dropdown to access the entry you want to search on.

Custom Queries

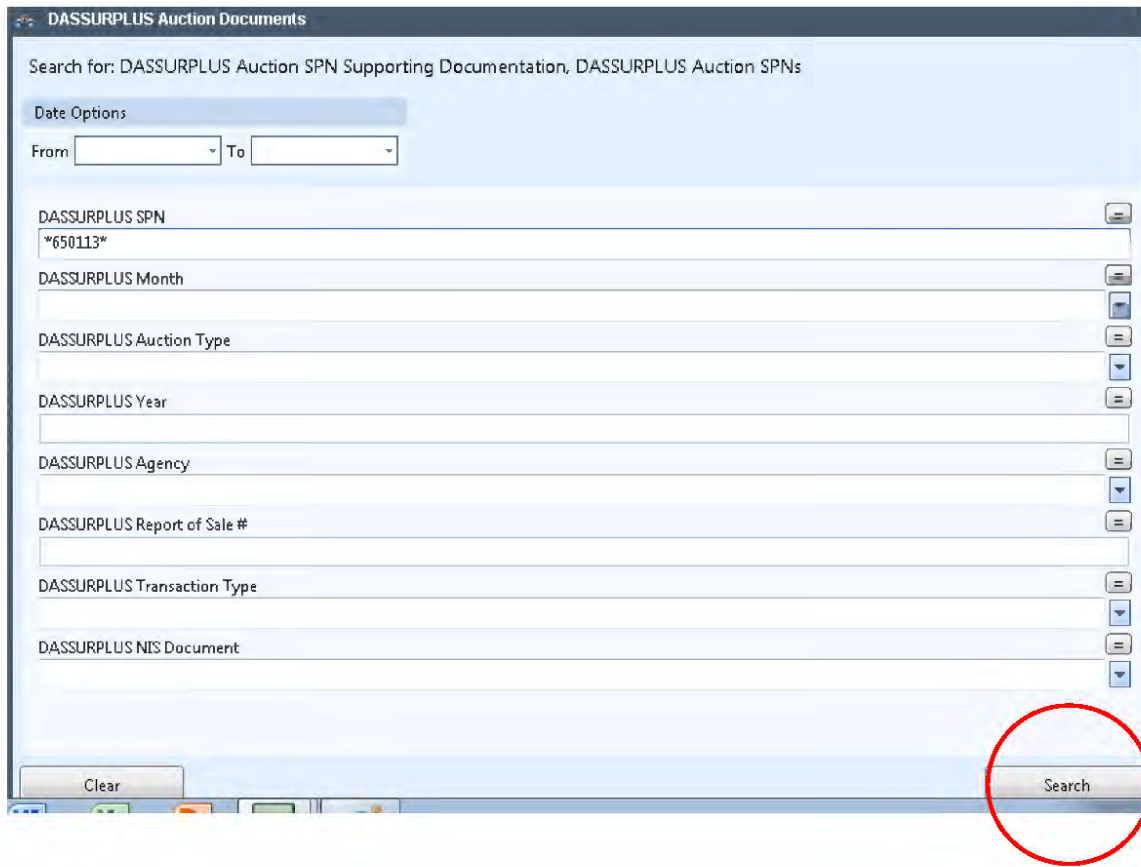
There are several queries that can be run to provide information.

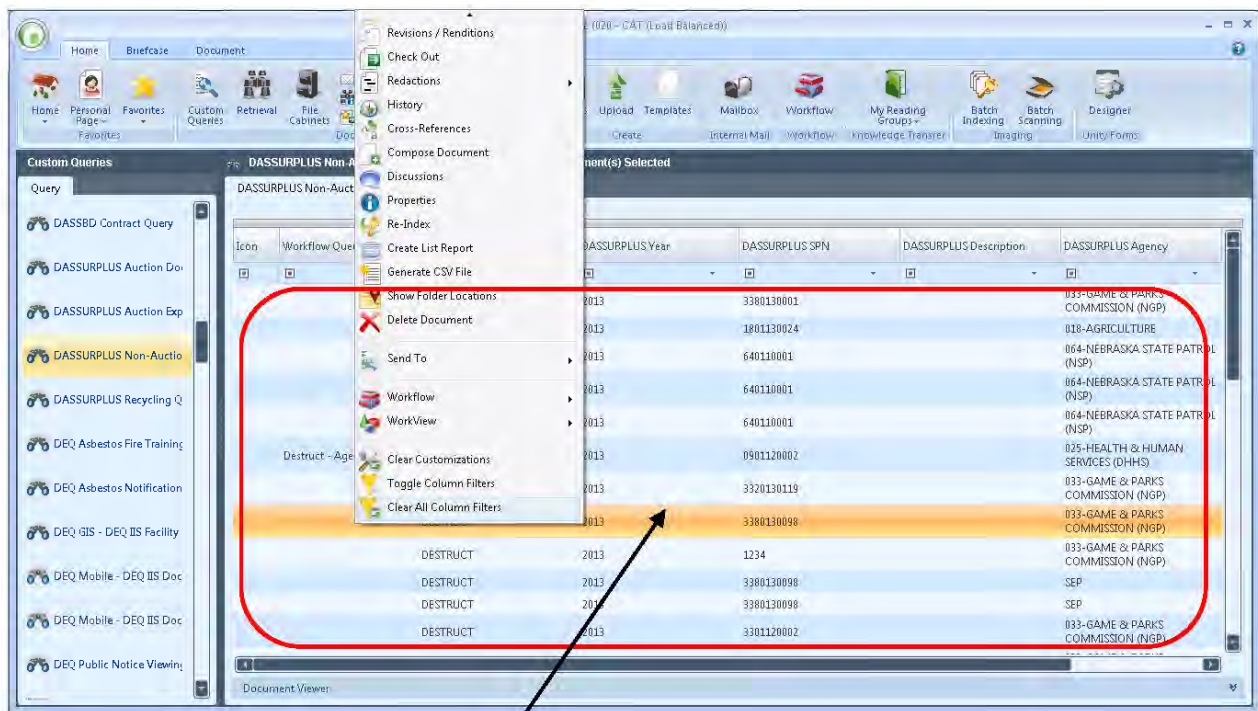
To run a query, be sure you are on the **Home** tab.



Click on the **Custom Queries** icon.

The queries will be listed down the left side. Click on the query you want to run, click on **Search** to run it. The Custom Queries for Surplus are DASSURPLUS Auction Documents and DASSURPLUS Non-Auction Query. Your main search for both queries will occur in the SPN Field. For the Auction Documents you may also want to utilize the Month and Year fields.





Keywords will be listed across the top of the screen that is returned.

You can click on the column header (in grey) to sort the columns.

The line below the column header is a filter line. Filtering can be done similar to Excel.

If queries are not returning expected results, you may need to clear filters that were set. Right click in the area where the documents are listed and scroll to the bottom of the menu.

At the bottom of the menu are options to Clear Customizations, Toggle Column Filters, or Clear all Column Filters. Click on Clear All Column Filters to reset the filters.

Click on Toggle Column Filters to hide and restore the filter area.

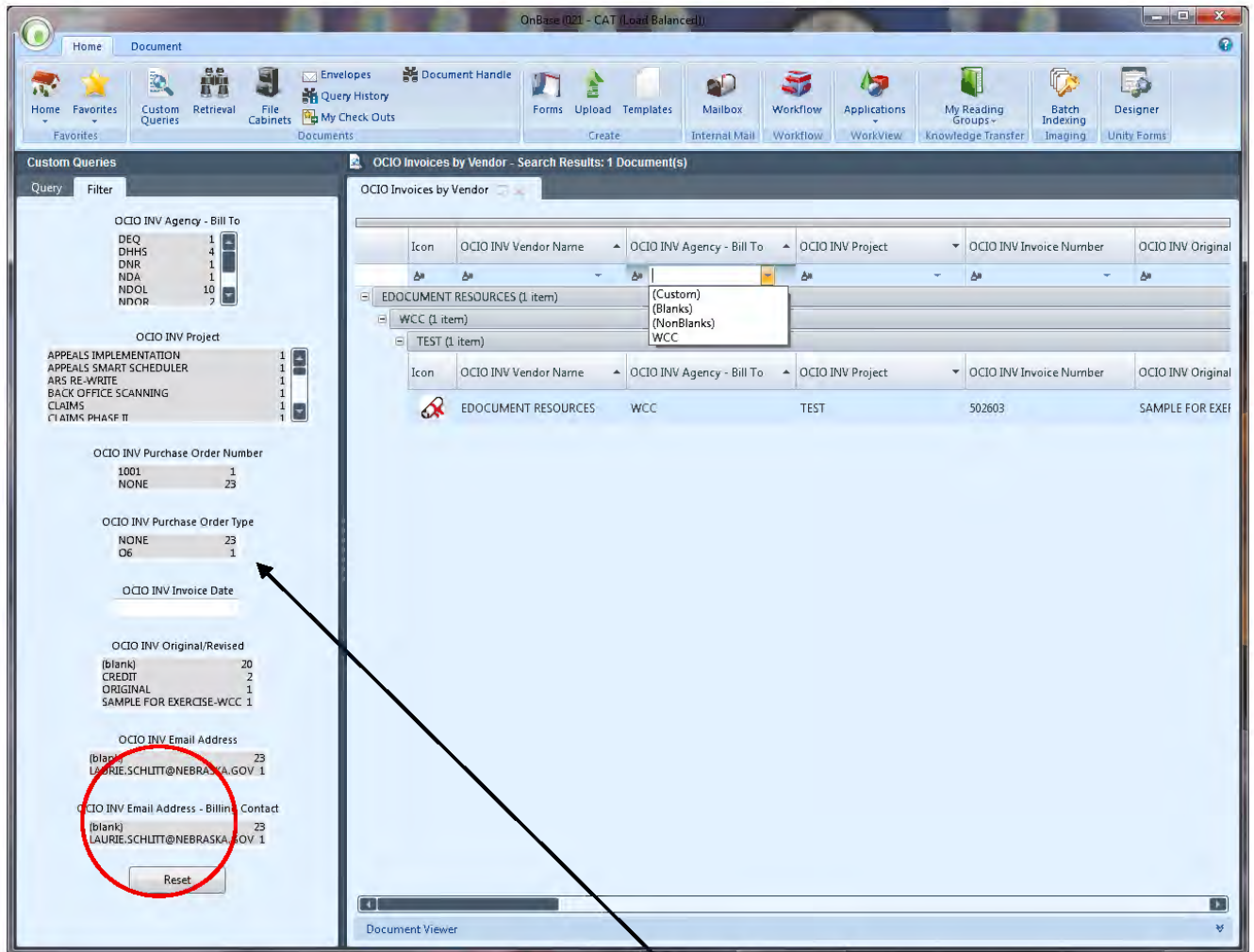
Customizations

Customizations are actions that each user can do to make this screen more usable.

Columns can be rearranged as needed. If you click on the column headers, they can be dragged to a different position.

If it is beneficial to view records by groups, click on the column header, and drag it ABOVE the column headers. The view will be changed to show the same documents, only grouped together.

To remove these customizations, right click in the document area, and click on Clear Customizations.



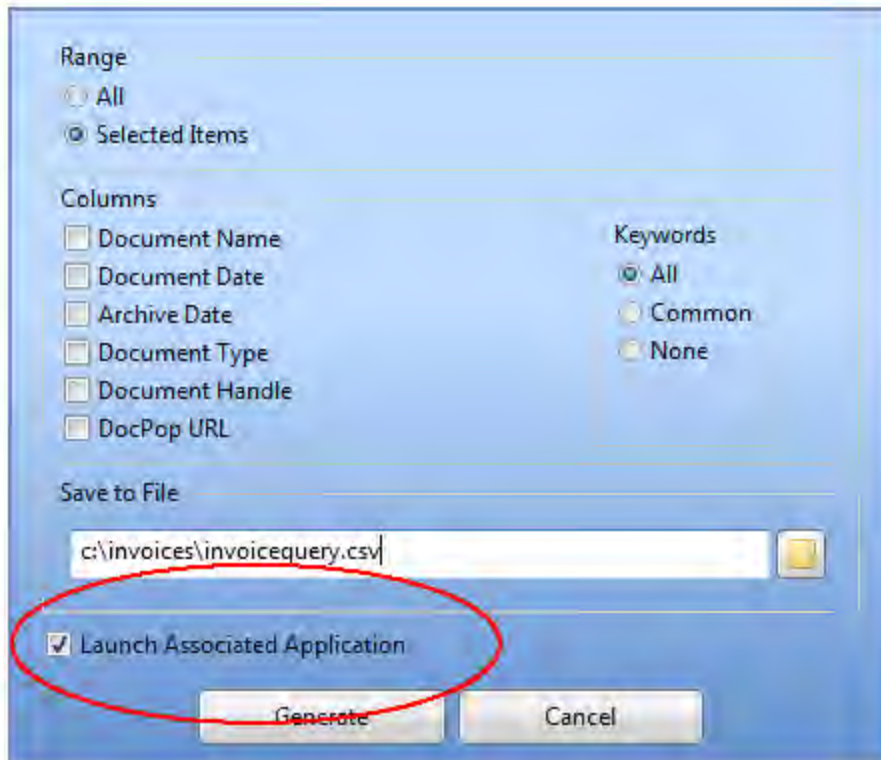
You can select values in the filter column to select documents.

Click on Reset at bottom to erase your selections for the filter.

The documents selected can be viewed on the right.

Exporting Documents to Excel

Select all the documents you want to look at further. Right-click on them, choose Generate to CSV, and export them to Excel. (see next page)



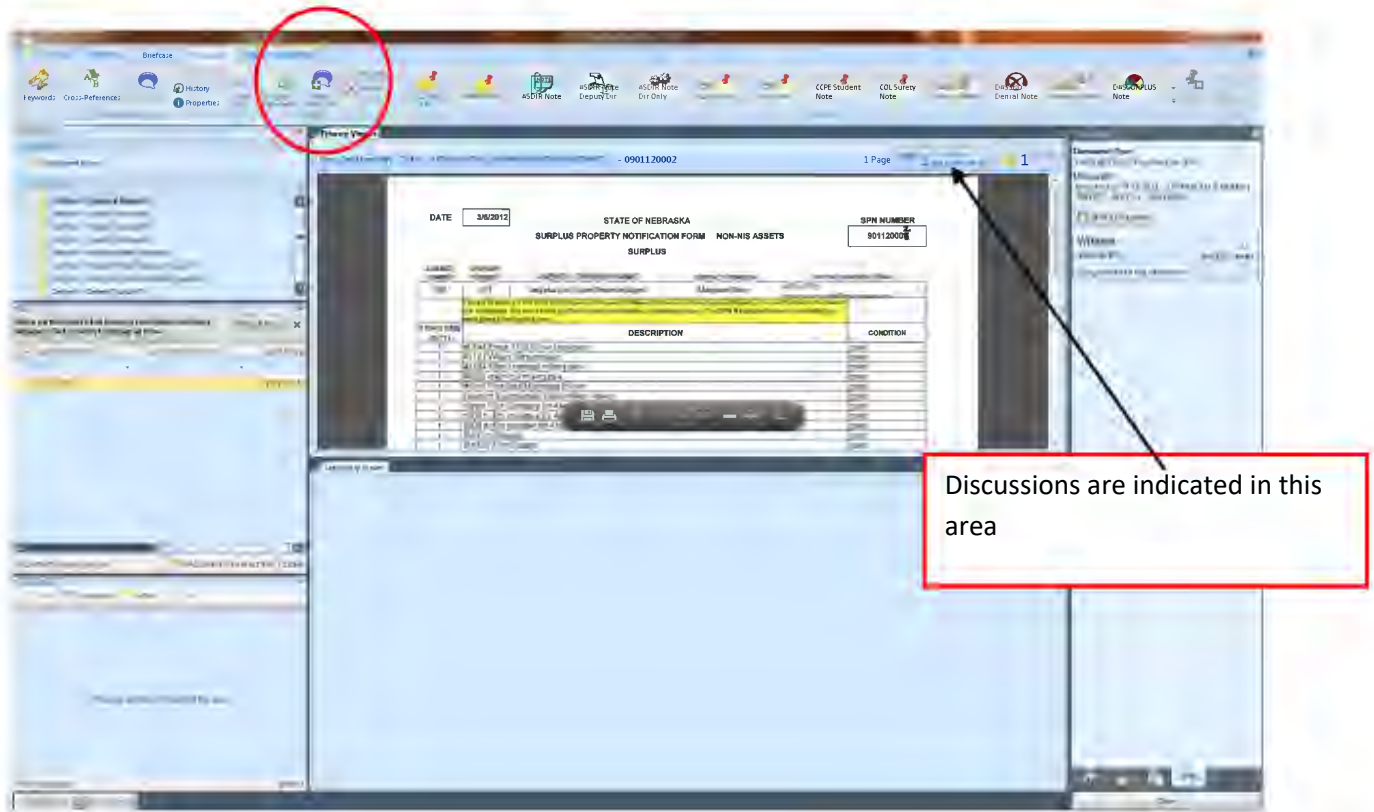
Fill in the file name where the information should be stored.

Be sure Launch Associated Application is checked.

Click on **Generate** on this screen. Excel will be automatically opened with the selected document keywords.

You can use excel to do additional filtering, sorting, and adding of amounts.

Discussions



Discussions are more permanent than Notes. Discussions cannot be deleted.

To add a discussion, click on the Document tab, and click on Start a Discussion.

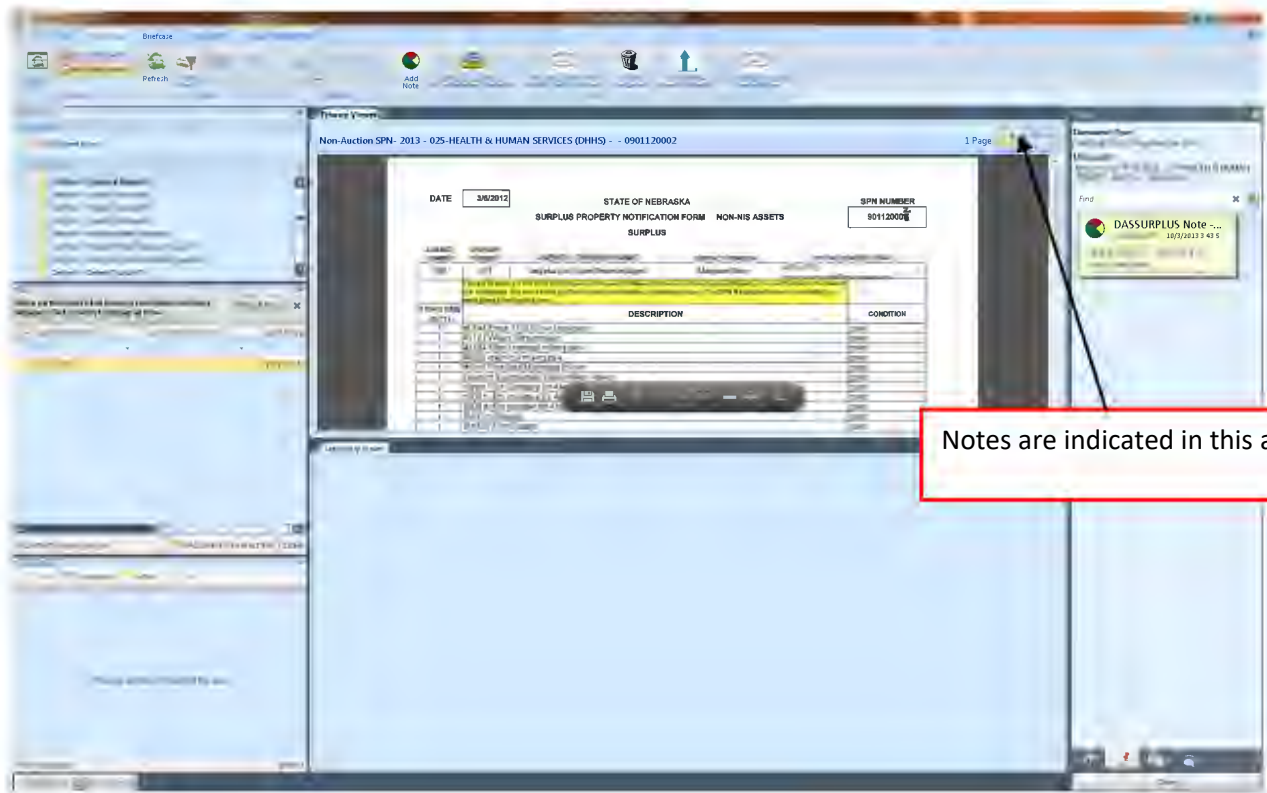
A discussion window will be opened. A title and body can be added. Click on Submit when you have added the information.

When a discussion is present, the Discussion indicator will show in the upper right corner of the document. If you click on this, the Discussion window will be opened.

If you click on the discussion, a larger window will be opened so you can view the discussion thread. There will also be a button allowing you to "Reply to Thread".

You can click on the Close button to close the discussion window.

Notes



Notes can be added to documents thru the ad hoc tasks.

Notes are similar to sticky notes. They can be added. If people have the security, they can also be deleted. They are useful for passing on information that may not be needed permanently.

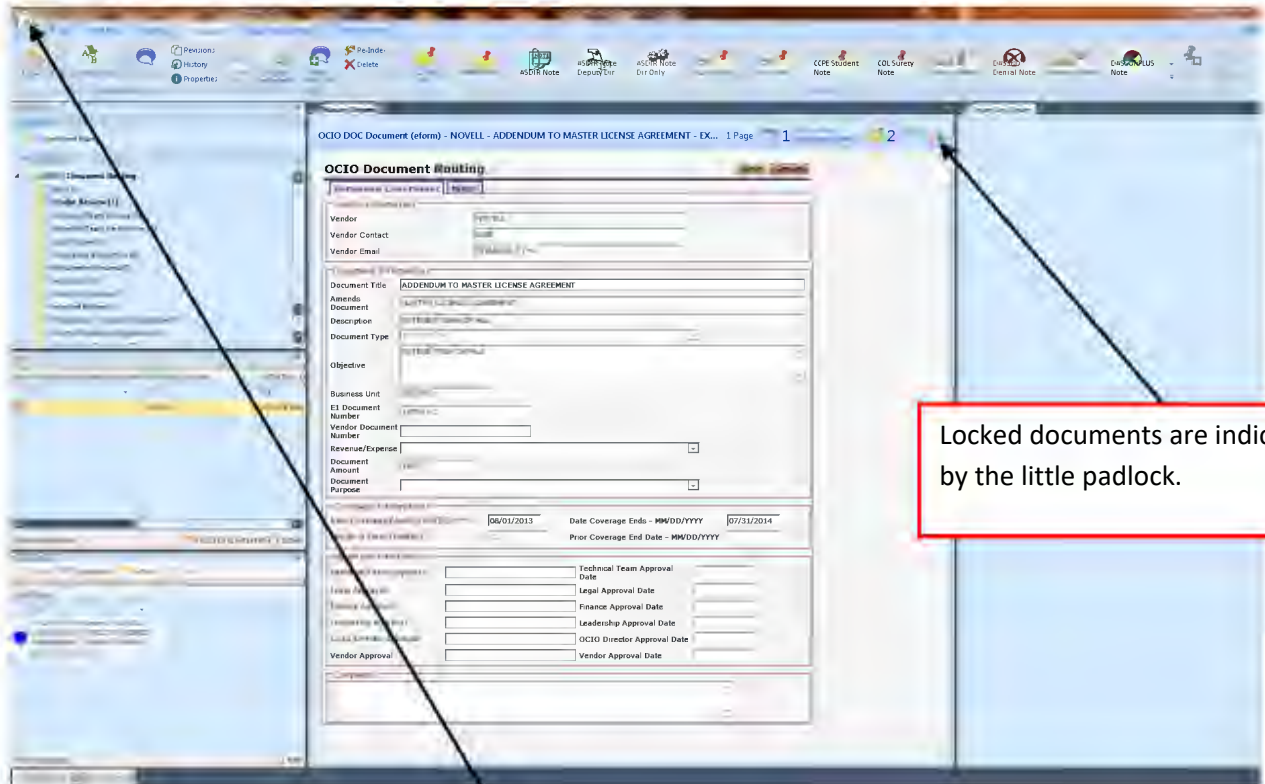
When there are notes associated with a document, it will show on the upper right-corner of the document.

If you click on the Notes indicator, it will open a window so you can see the various notes.

Click close at the bottom to close this window.

If Surplus notices a destruct that has been in this queue for awhile, they can send an email out to the agency requesting that it be processed.

Locked Documents



Documents are locked by the first person to view the document. While that person is viewing/changing the document, changes will not be allowed by other people. They can still see the document, but they cannot change it.

A locked document is indicated by a little padlock in the upper right corner of the document.

If you hover your mouse over this padlock, you can see who has the document locked.

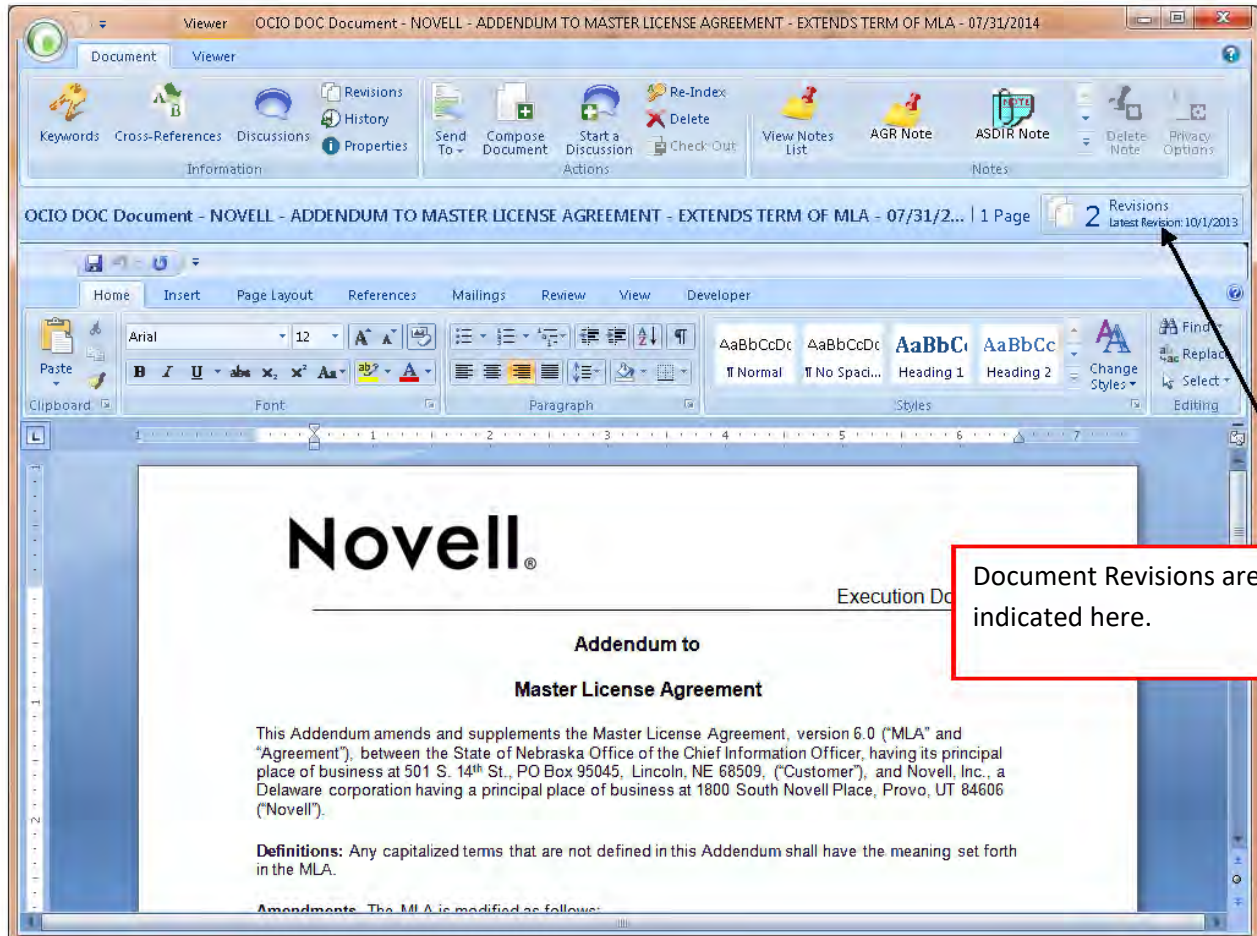
To prevent locked documents, be sure to not be viewing documents when you close out of the Unity client.

If you have a locked document, you may be able to unlock it yourself if you have security privileges to do this. Click on the little green/white O icon in the upper left corner. Click on Manage Locks. Click on the lock on the document that is to be removed, and click on Remove Selected.

Document Revisions

When a new version of a document is uploaded, it gains a revision.

Revisions are indicated in the upper right corner of the document.



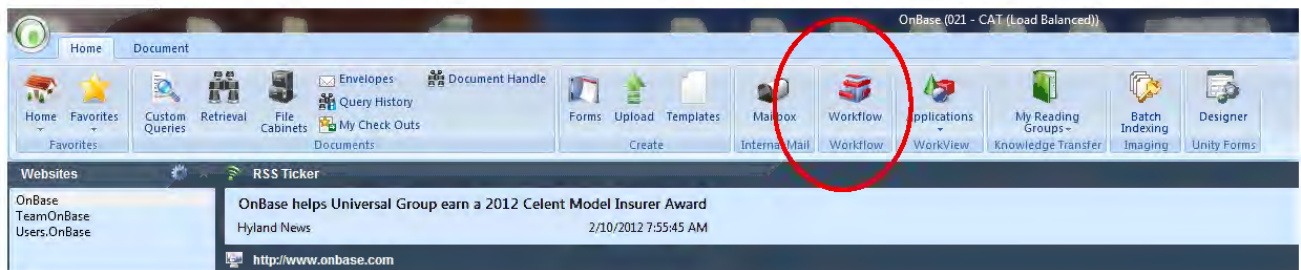
If you click on the Revisions indicator, you can see when the document was saved, and by who. You can also view the previous revisions of the document.

DASSURPLUS – Surplus Property Lifecycle Workflow

The DASSURPLUS - Surplus Property Workflow is used to route various documents between the agencies and AS Surplus for approvals.

Log into the Unity Client.

Once you have logged in, click on the Workflow button.

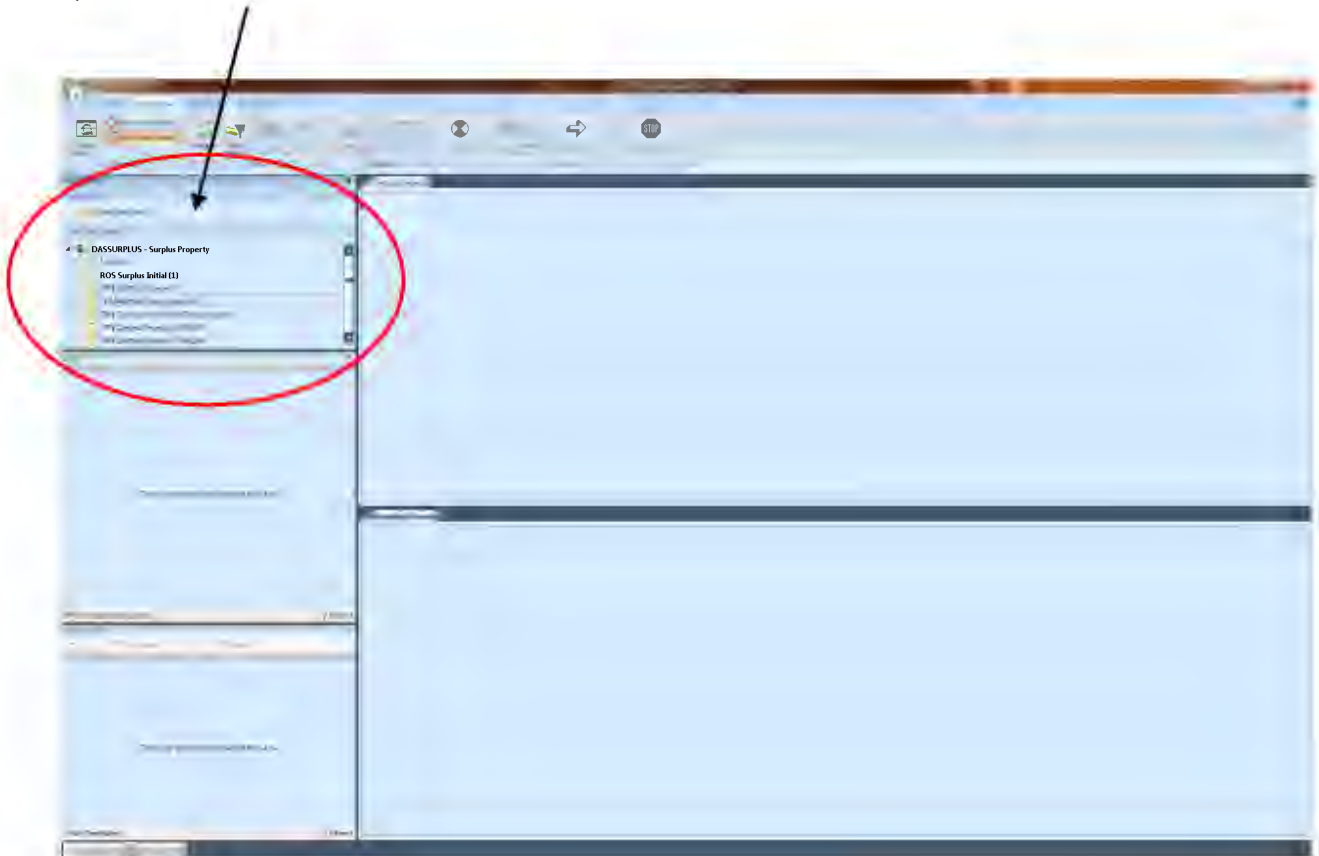


Queues

Click on the DASSURPLUS – Surplus Property life cycle.

- Depending on your security level, you may or may not see all the available queues in the life cycle.

Queue names



Queue Basics

When new documents are added, they will automatically have a coversheet added for the document. The actual document will appear in the Related Items window.

The screenshot shows a software application window with a top menu bar containing 'Home', 'Workflow', 'Queue Administration', and 'Queue Administration'. Below the menu bar is a toolbar with icons for 'Change Layout', 'Refresh', 'Apply Filter', 'Add Note', 'Report Supporting Document', 'Forward Document to Queue', 'Delete Document', 'Unlink New Agency Document', and 'Send Email to Agency Admin'. The left sidebar has a 'Life Cycles' section with 'Inbox Views' and 'Combined Tab' options. Below this is a tree view for 'All Life Cycles' with folders like 'Adjustment - Administrator Dispose Review (0)', 'Destruct - Agency Begin (11)', 'Destruct - Surplus Process (0)', 'Destruct - Agency Review (0)', 'Destruct - Surplus Review (0)', 'Destruct - Administrator Dispose (0)', 'Destruct - Administrator Dispose Review (0)', and 'Destruct - Remove from Workflow Queue (0)'. Below the tree view is an 'Inbox' section with a table of documents. The table has columns for 'Item', 'DASSURPLUS SPN', 'DASSURPLUS DOC #', and 'DASSURPLUS STATUS'. One document is highlighted: 'M0120002'. Below the table is a 'Selected Items' section with a 'Destruct - Agency Begin' button and a 'DASSURPLUS Destruct' button. The central 'Primary Viewer' displays a 'Non-Auction SPN - 2013 - 025-HEALTH & HUMAN SERVICES (X)HHS - - 09011 - 1 Page'. It shows a 'DATE' of '3/6/2012' and 'STATE OF NEBRASKA SURPLUS PROPERTY NOTIFICATION FORM - NON-NIS ASSETS'. Below this is a table for 'SURPLUS' with columns for 'AGENCY NUMBER', 'DIVISION NUMBER', 'AGENCY / DIVISION NAME', 'CONTACT PERSON', and 'PHONE NUMBER / EMAIL'. The table contains one row: '009 001 Secretary of State-Records Mgmt Margaret Bohy 471-8770'. Below the table is a section for '# OF ITEMS (QTY)' with columns for 'DESCRIPTION' and 'CONDITION'. It lists various items like '3100 Silver Duplicator', 'Water Spectrometer', 'Alien chemical mixing tank', 'chemical mixing tank', 'Film Jack Microseal 35 mm', 'Thermostatic Water Mixer Valves', 'Film canisters for Alien F10', 'Film canisters for Alien F10', 'Film Cleaner', 'Kodak film', 'Kodak film', 'Fiche Reader', and 'Water Softner'. The 'CONDITION' column for all items is 'good'. Below the table is a 'Date Received' field with '3-14-2012' and a 'By' field with 'J. J. J. J. J.'. The right 'Secondary Viewer' is empty.

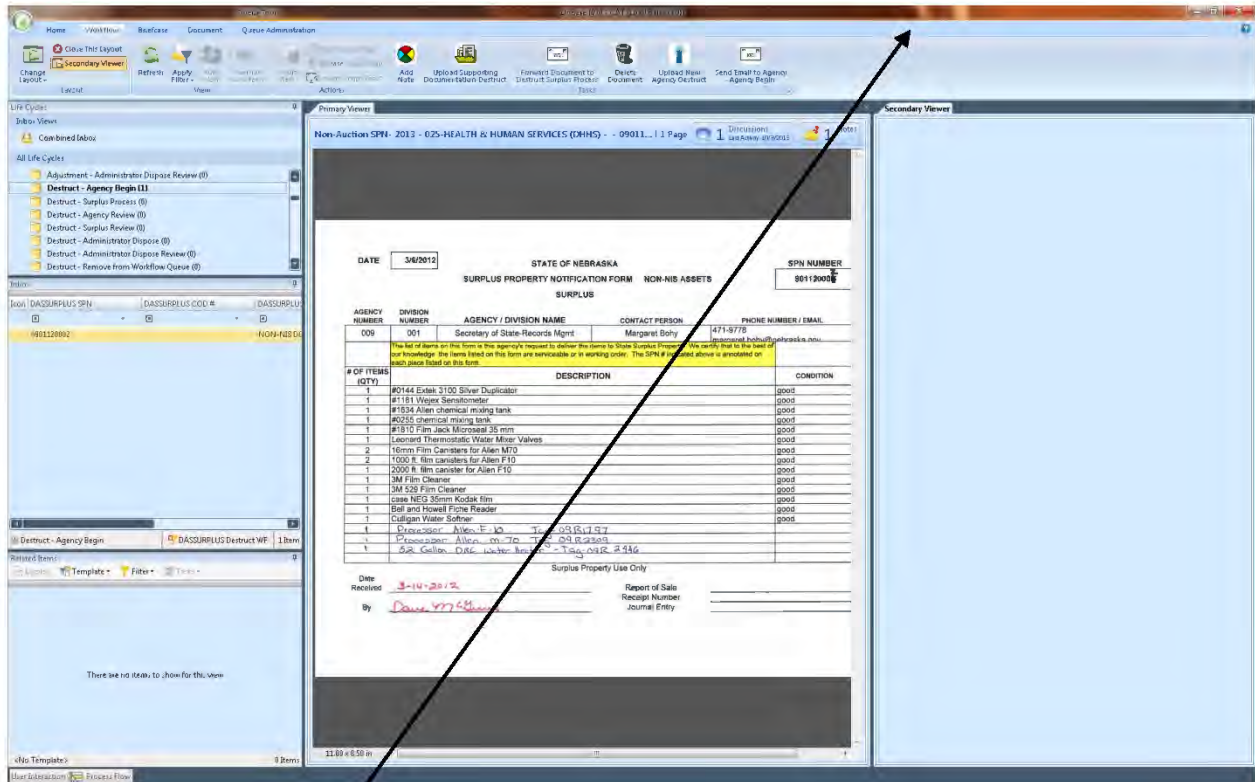
Inbox where document appears

Related Items window: When you click on documents in this window, they will appear in the secondary viewer.

Your window may look different from this example. You can format your window to your liking. If you would like to have this layout, click on Workflow tab. Click on the Change Layout icon directly below the tab and click on Classic. Click on Secondary Viewer (next to Change Layout icon). Click on the Change Layout icon (again), and click on Save Current Layout as Default.

Queue Basics – Missing Icons

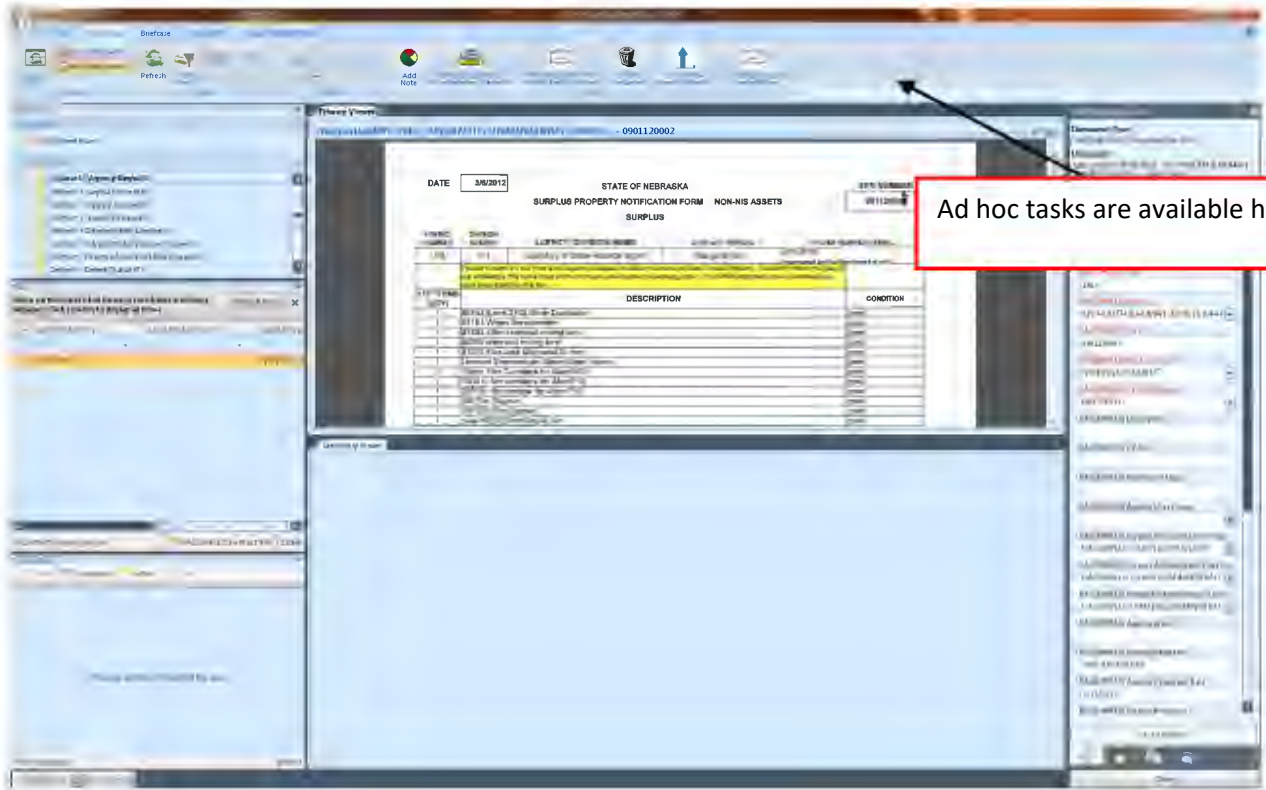
If you open your workflow, and you are missing your ribbon (see below)...



Right-Click in the blue area

Uncheck the Minimize Ribbon checkbox.

Ad Hoc Tasks



Ad hoc tasks are the buttons that can be pushed to take an action on a document. Different tasks are available in different queues. In order to move a document forward or backward to a different queue, these tasks must be utilized.

Destruct – Agency Begin

To begin this process, you must first import/upload a document into the Enterprise Content Management (ECM) system. Please use the following instructions to do so:

Importing Documents

There are multiple ways to add documents to ECM. For this process, the main ways are:

- 1) Using Hyland Virtual Printer
- 2) Uploading or Importing Documents

After the documents are successfully loaded into ECM, they will need to be indexed.

The Document Type Group will be DASSURPLU Filing Cabinet.

Select the document type DASSURPLUS FC Non-Auction SPN.

Set the key word DASSURPLUS Non-Auction Type = DESTRUCT.

Hyland Virtual Printer

Once you have selected the document that you want to work with (ex: via Windows Explorer or an attachment in an email), select the Printer button and select the 'Hyland Virtual Printer' and depress the 'Print' button. **YOUR UNITY CLIENT MUST BE OPEN DURING THE PRINTING PROCESS.** You will be prompted to Perform Upload by the Unity Client flashing. Index the document by completing the information on the left hand side. **If items are in red, they are required!** When all information has been entered, depress the 'Upload' button.

Uploading or Importing Documents

Click on the Home button in the Unity Client, then the 'Upload' button. You will need to browse your computer to locate the document you wish to upload and double click to bring the document into the system or click Open. Index the document by completing the information on the left hand side. **If items are in red, they are required!** When all information has been entered, depress the 'Upload' button.

After a successful upload and an addition to the Destruct-Agency Begin queue, you will receive an e-mail stating you have added a document to the workflow.

Forward Document to Destruct Surplus Process

This ad hoc task will update the Agency Requester and date keywords. It will move the document from this queue forward to the Destruct – Surplus Process queue. An email will be sent to Surplus notifying them that a document has been forwarded to that queue.

Delete Document

This will delete the item out of ECM. This task would be used if an item was accidentally added to ECM or if you decide to retain the item.

Upload New Agency Destruct

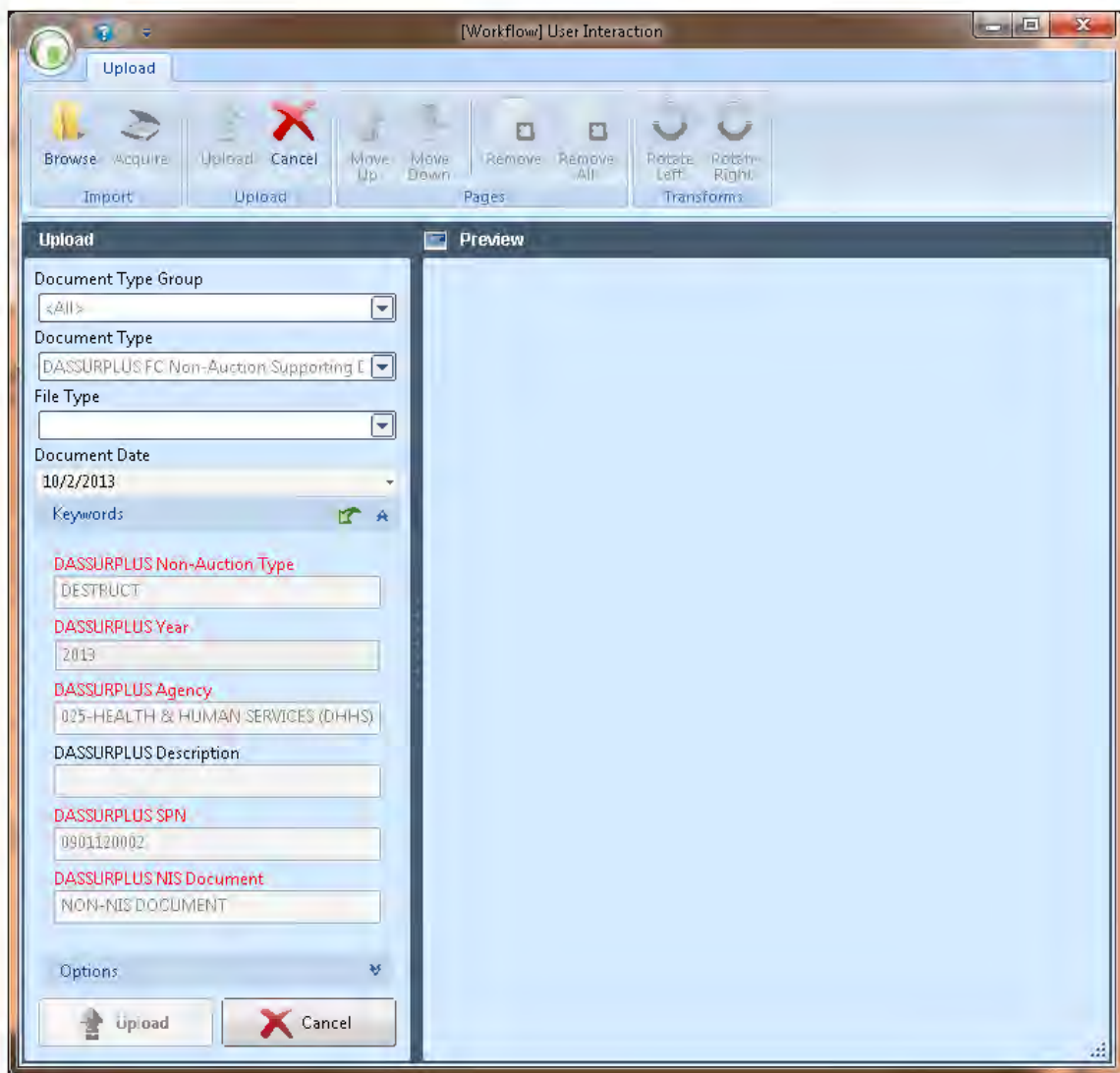
This ad hoc task is used to upload a revised copy of the SPN. This would be done if there were signatures added, or other changes made. The revised copy will be a revision of the original.

Send Email to Agency – Agency Begin

This is for Surplus Only.

Upload Supporting Documentation - Destruct

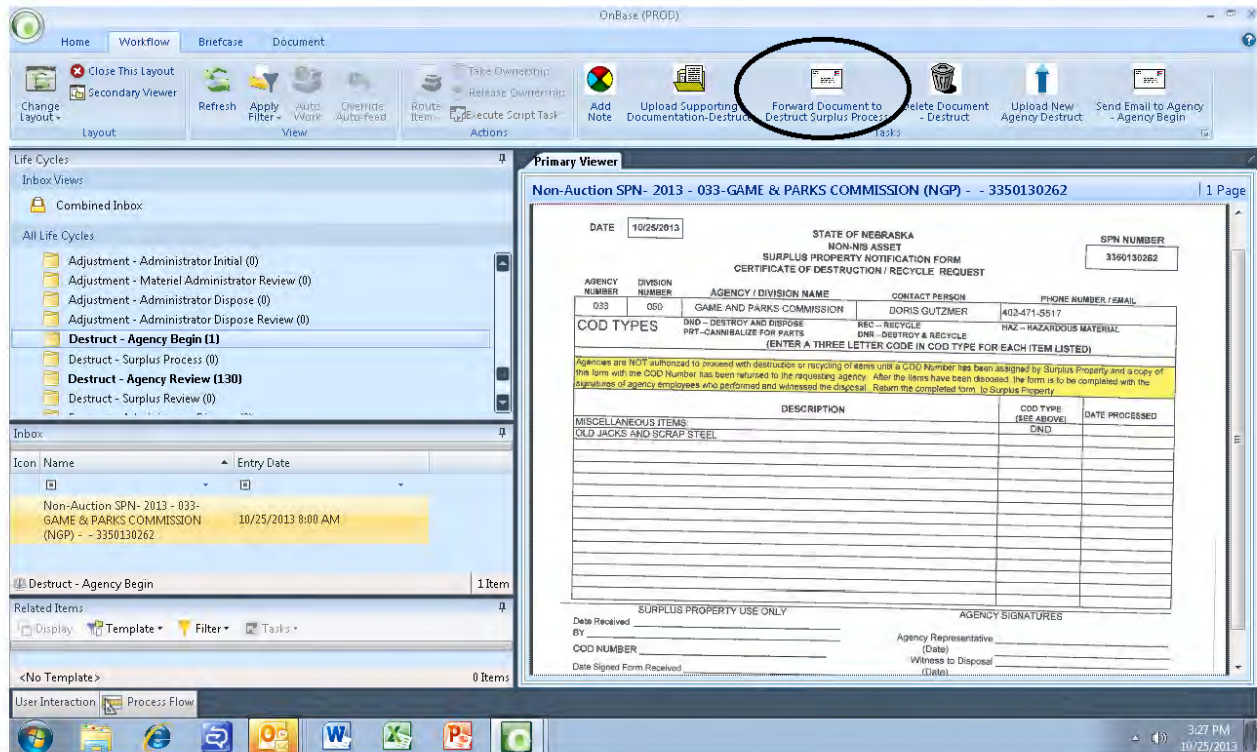
This ad hoc task will allow you to upload supporting documentation.



When you click on this task, this window will appear. Click on the browse button in the upper left corner, and browse to the document you want to upload, which should be stored on your computer.

When you have selected the document, click on UPLOAD button at the bottom of the screen. The document should then be attached in the Related Items window.

In the queue Destruct-Agency Begin, the document will have a status of FIRST STEP. Please click on Forward Document to Destruct Surplus Process in order to send the Certificate of Destruction request to Surplus Property for Approval.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab. If you do not see the ribbon, refer to Queue Basics – Missing Icons. You may or may not have security to perform all of the Ad Hoc tasks listed. You may add a note at this point, upload supporting documentation, forward the document to Surplus Property for Approval or you can also delete the document, if your agency decides to retain the item.

If items stay in this queue for more than 30 days, an email will be sent to the agency reminding them to process the destruct. Emails will be sent at 30, 60, and 90 days.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

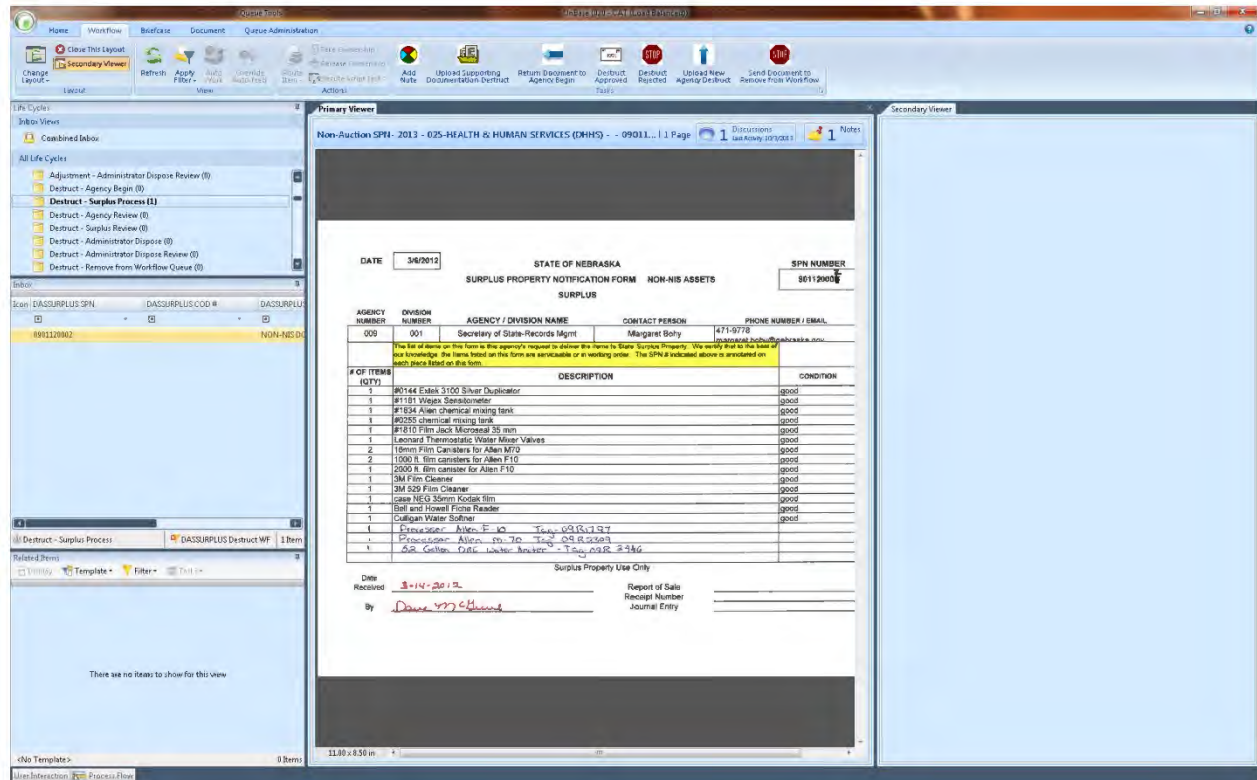
Upload Supporting Documentation - Destruct

This ad hoc task will allow you to upload supporting documentation.

Destruct – Surplus Process

Surplus Process

An email will be sent to Surplus when an item arrives in this queue.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation - Destruct

This ad hoc task will allow you to upload supporting documentation.

Return Document to Agency Begin

This ad hoc task will open a note for a return reason to be added. Be sure to click on OK to save the note. An email will be sent to the agency notifying them that the SPN is being returned. The SPN is then returned to the Destruct – Agency Begin queue. The status will be updated to RETURNED.

Destruct Approved

The status will be updated to APPROVED. A notification will be sent to the agency notifying them that there is a document in the Destruct – Agency Review queue. The Surplus processor and date keywords will be are updated. An e-mail will be sent to the requesting Agency stating the approval.

Destruct Rejected

The status will be updated to REJECTED. A notification will be sent to the agency notifying them that there is a document in the Destruct – Agency Review queue. The Surplus processor and date keywords will be are updated. An e-mail will be sent to the requesting Agency stating the rejection of the COD.

Upload New Agency Destruct

This ad hoc task is used to upload a revised copy of the SPN. This would be done if there were signatures added, or other changes made. The revised copy will be a revision of the original.

Send Documents to Remove from Workflow

The status will be updated to REMOVED. A note will be opened so information can be added about why the item is being removed. Be sure to click OK to save the note. A notification will be sent to Surplus to review the document. If they agree, it will be removed from workflow.

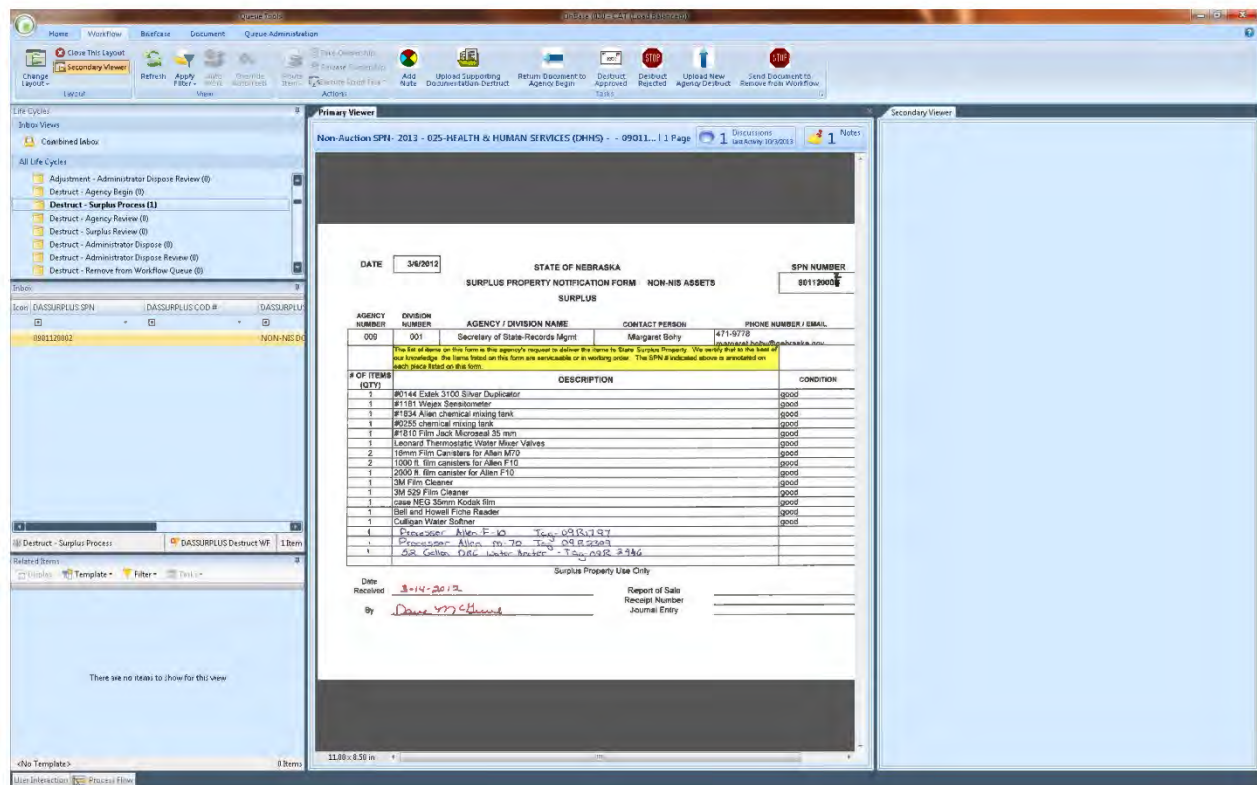
Destruct – Agency Review

Agency Review

An email will be sent to the Agency when an item arrives in this queue.

If documents are in this queue for 30 or 60 days, an email will be sent to the agency reminding them to process the destruct.

After 90 days, emails will be sent daily reminding the agency to process the destruct.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

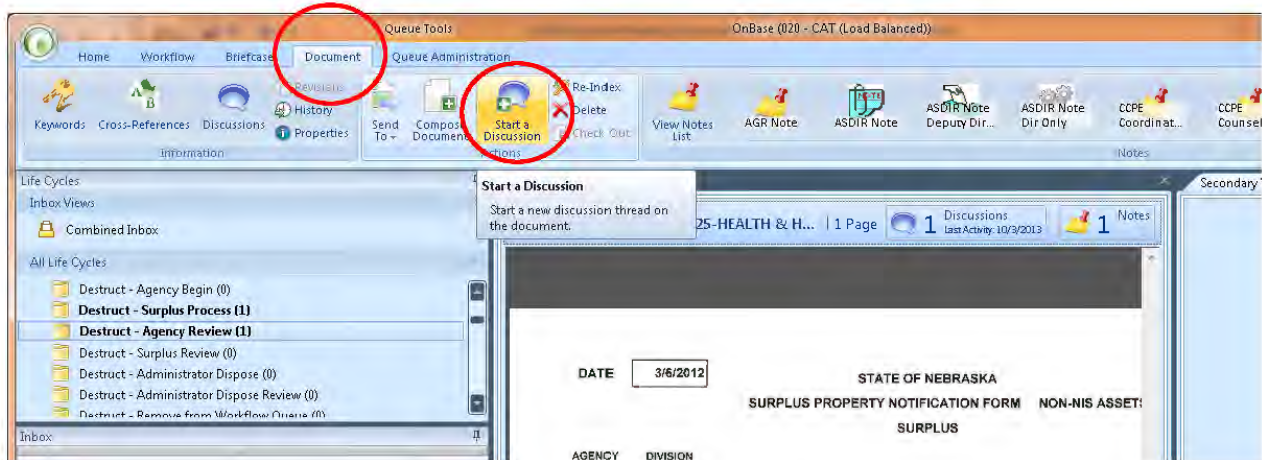
If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation - Destruct

This ad hoc task will allow you to upload supporting documentation.

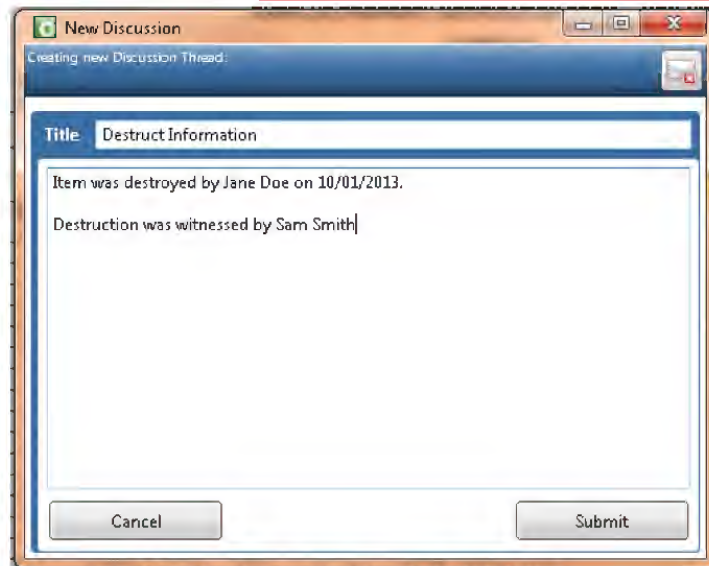
Send Destruct Document to Surplus for Review

On APPROVED item, enter in the witness information before you Send Destruct Document to Surplus for Review! You must use the Start a Discussion option under the Document tab to add the witness information.



A Discussion window will be opened. In the title, type Destruct Information. In the body, include who destroyed the item, the date it was destroyed and who witnessed the destruction.

Save the discussion. **DO THIS BEFORE YOU CLICK THIS TASK**



When the Send the Destruct Document to Surplus For Review task is clicked on, if the document has a status of APPROVED, the status will be updated to DESTROYED BY AGENCY. The agency reviewer and date keywords will be updated. The document will be moved to the Destruct-Surplus Review queue. This must be done in order for the Agency's part of the process to be completed.

If the document has a status of REJECTED, a notification will be displayed saying this cannot be done.

Upload New Agency Destruct

This ad hoc task is used to upload a revised copy of the SPN. This would be done if there were signatures added, or other changes made. The revised copy will be a revision of the original.

Send Documents to Remove from Workflow

The status will be updated to REMOVED. A note will be opened so information can be added about why the item is being removed. Be sure to click OK to save the note. A notification will be sent to Surplus to review the document. If they agree, it will be removed from workflow.

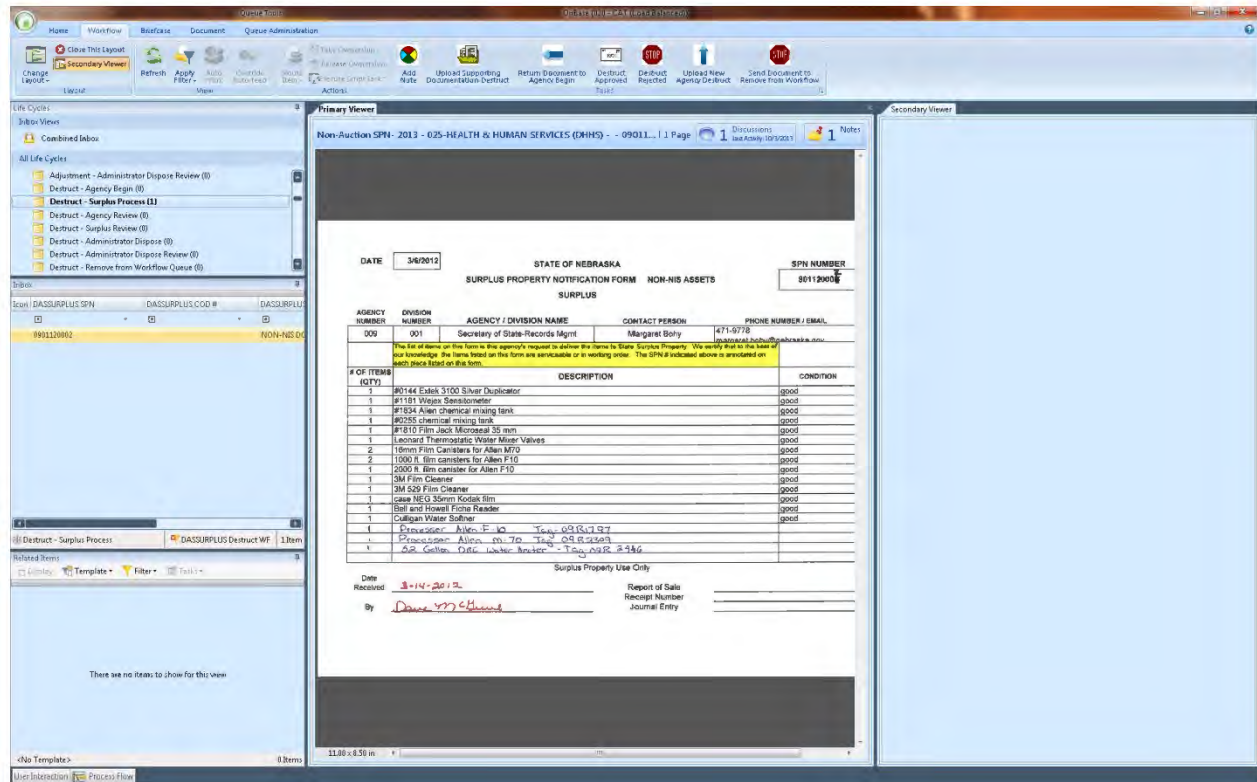
Surplus Only Ad Hoc Tasks

There are ad hoc tasks to send out the 30, 60, and 90 day emails.

Destruct – Surplus Review

Surplus Review

An email will be sent to Surplus when an item arrives in this queue.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation - Destruct

This ad hoc task will allow you to upload supporting documentation.

Return Document to Agency Review

This ad hoc task will create a note for the document then transition the document to the Destruct-Agency Review queue.

Completed/Send Document to Admin for Dispose

This ad hoc task will update the DASSURPLUS Surplus Processor Review keyword to the Current User's Name. Then, it will update the DASSURPLUS Surplus Processor Review Date keyword to the Current Date.

It will then check to determine if this is a NON-NIS DOCUMENT.

If it is a NON-NIS DOCUMENT, it will set the DASSURPLUS Non-Auction SPN Status keyword to DESTROYED, send an email notification to the user's email address and transition the document to the Removal queue.

If it is NOT a NON-NIS DOCUMENT, it will send a Destruct Agency Notification-Begin email to the user's email account. Then, transition the document to the Destruct – Administrator Dispose queue.

Upload New Agency Destruct

This ad hoc task is used to upload a revised copy of the SPN. This would be done if there were signatures added, or other changes made. The revised copy will be a revision of the original.

Send Documents to Remove from Workflow

The status will be updated to REMOVED. A note will be opened so information can be added about why the item is being removed. Be sure to click OK to save the note. A notification will be sent to Surplus to review the document. If they agree, it will be removed from workflow.

Destruct is Disposed-Move to Review

This ad hoc task will update the DASSURPLUS Non-Auction SPN Status keyword to DISPOSED. It will notify the user via email that the destruct is completed.

It will then update the DASSURPLUS Surplus Administrator keyword to the Current User's Name, update the DASSURPLUS Surplus Administrator date to the Current Date and finally transition the document to the Destruct – Administrator Dispose Review queue.

Destruct – Central Finance Dispose Review

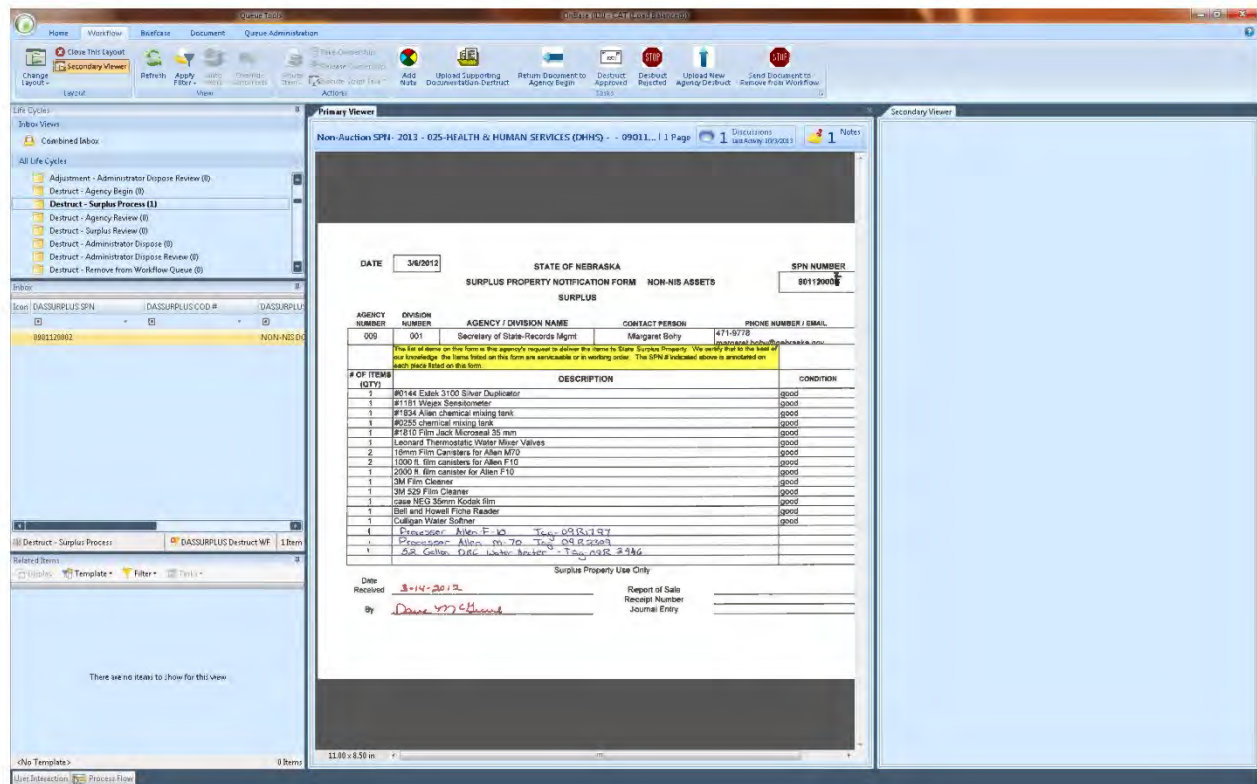
Administrator Dispose Review

An email will be sent to the Administrator when an item arrives in this queue.

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.



Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation - Destruct

This ad hoc task will allow you to upload supporting documentation.

Post Adjustment Batch - Destruct

It will notify the user via email that the batch has posted.

It will then update the DASSURPLUS Central Finance Poster keyword to the Current User as well as update DASSURPLUS Surplus Central Finance Poster Date to the Current Date.

Finally, it will transition the document to the Removal queue.

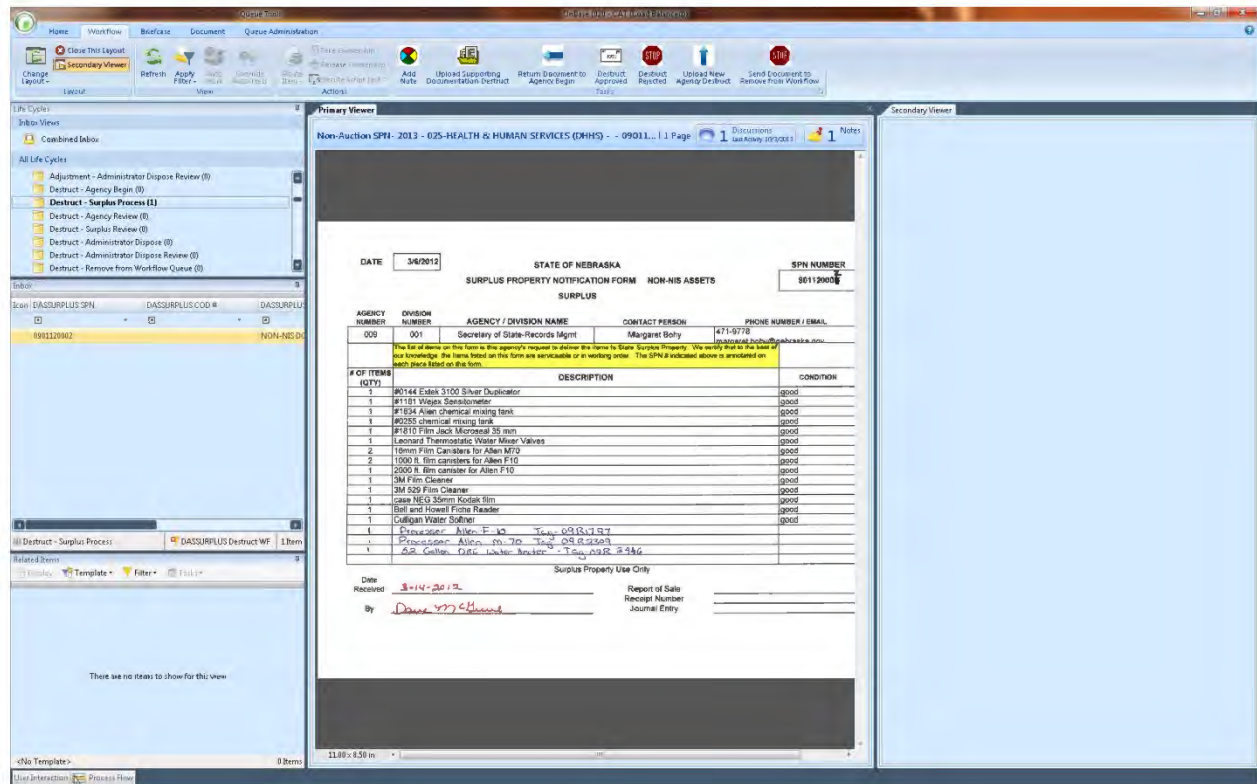
Return to Surplus Admin - Destruct

It will notify the Surplus Admin via email that the document has been returned to the Surplus Administrator Dispose queue.

Destruct – Remove from Workflow Queue

Remove from Workflow Queue

An email will be sent to Surplus when an item arrives in this queue.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Remove Document from Workflow

This ad hoc task will transition the document to the removal queue.

Return Document to Agency Reviewer

This ad hoc task will set the DASSURPLUS Number of Days keyword to the value of 0, Create a note for the document and finally, transition the document to the Destruct-Agency Review queue.

Adj – Agency Begin

To begin this process, you must first import/upload a document into the Enterprise Content Management (ECM) system. Please use the following instructions to do so:

Importing Documents

There are multiple ways to add documents to ECM. For this process, the main ways are:

- 1) Using Hyland Virtual Printer
- 2) Uploading or Importing Documents

After the documents are successfully loaded into ECM, they will need to be indexed.

The Document Type Group will be DASSURPLUS Filing Cabinet.

Select the document type DASSURPLUS FC Non-Auction SPN.

Set the key word DASSURPLUS Non-Auction Type = ADJUSTMENT.

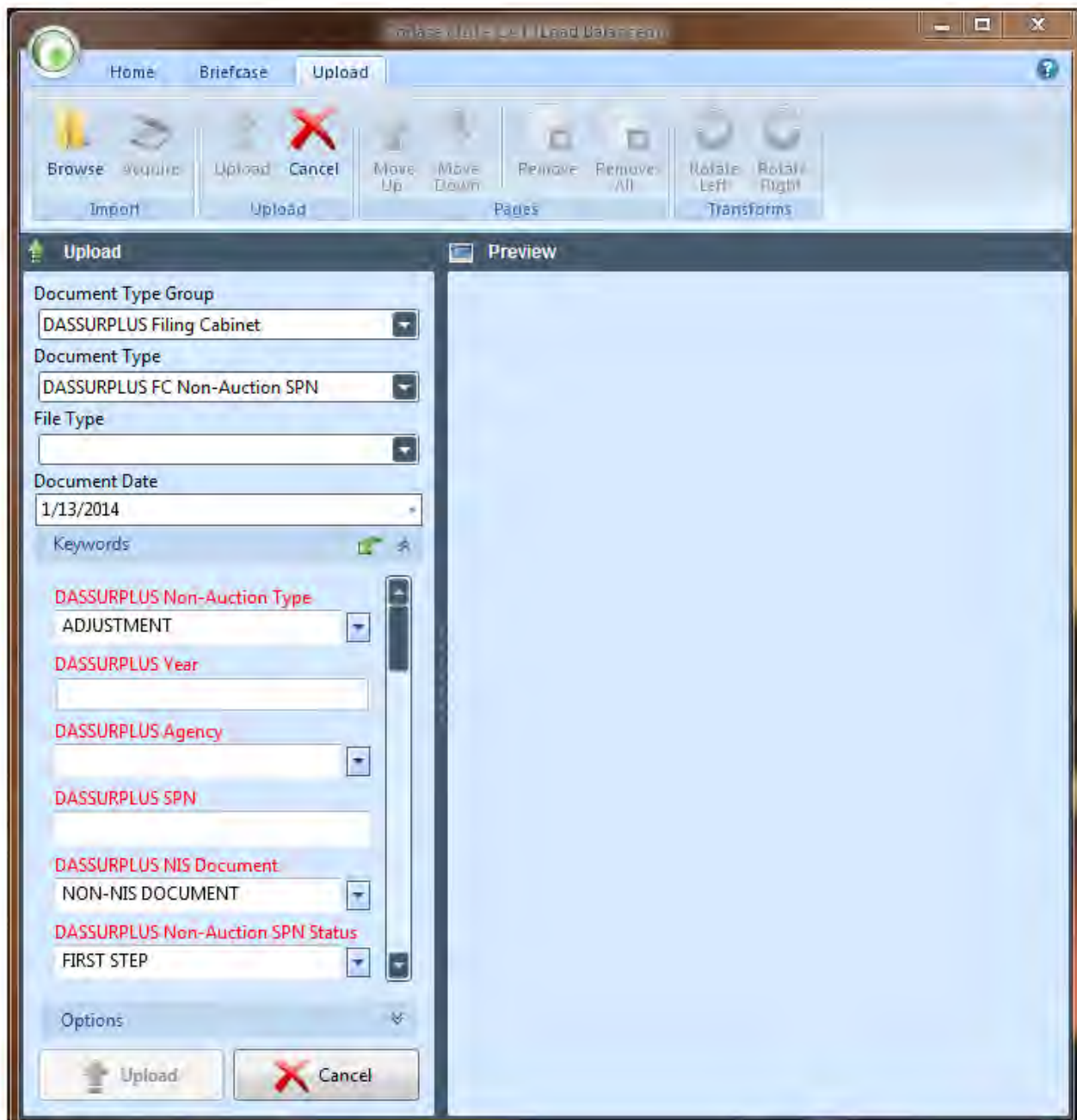
Hyland Virtual Printer

Once you have selected the document that you want to work with (ex: via Windows Explorer or an attachment in an email), select the Printer button and select the 'Hyland Virtual Printer' and depress the 'Print' button. **YOUR UNITY CLIENT MUST BE OPEN DURING THE PRINTING PROCESS.** You will be prompted to Perform Upload by the Unity Client flashing. Index the document by completing the information on the left hand side. **If items are in red, they are required!** When all information has been entered, depress the 'Upload' button.

Uploading or Importing Documents

Click on the Home button in the Unity Client, then the 'Upload' button. You will need to browse your computer to locate the document you wish to upload and double click to bring the document into the system or click Open. Index the document by completing the information on the left hand side. **If items are in red, they are required!** When all information has been entered, depress the 'Upload' button.

After a successful upload and an addition to the Adj-Agency Begin queue, you will receive an e-mail stating you have added a document to the workflow.



When you click on the 'Upload' button, this task window will appear. Click on the browse button in the upper left corner, and browse to the document you want to upload, which should be stored on your computer.

When you have selected the document, click on UPLOAD button at the bottom of the screen. The document should then be attached in the Related Items window.

In the queue Adj-Agency Begin, the document will have a status of FIRST STEP. Please click on Forward Document to Adj-Surplus Admin Review in order to send the request to Surplus Property for Approval.

The screenshot shows the OnBase Queue Tools interface. The 'Queue Administration' ribbon is active, and the 'Forward Document to Adj-Surplus Admin Review' button is circled in red. The document being viewed is titled 'Non-Auction SPN- 2014 - 003-LEGISLATIVE COUNCIL - DOCUMENTATION TEST DOCUMENT - 300130003'. The document content is a 'STATE OF NEBRASKA SURPLUS PROPERTY NOTIFICATION FORM' for 'NON-NIS ASSETS'. The form includes a table with the following data:

AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
003	000	LEGISLATIVE COUNCIL	DIANE MCLAIN	402-471-2228

The form also includes a section for 'SURPLUS' items with the following table:

# OF ITEMS (QTY)	DESCRIPTION	CONDITION
1	TAG #03L3145, FILING CABINET LEGAL 4-DRWR	

The form is signed by Thomas L. Fespar on 7-31-2013. The date received is 7/31/2013. The form includes a section for 'Surplus Property Use Only' with fields for 'Date Received', 'By', 'Report of Sale', 'Receipt Number', and 'Journal Entry'. Handwritten notes at the bottom of the form read: 'TO RECORD TRANSFER OF CAPITOL ORIGINAL ITEM FROM Agency USE TO O.C.C. Program'.

Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab. If you do not see the ribbon, refer to Queue Basics – Missing Icons. You may or may not have security to perform all of the Ad Hoc tasks listed. You may add a note at this point, upload supporting documentation, forward the document to Surplus Property for Approval or you can also delete the document, if your agency decides to retain the item.

If items stay in this queue for more than 30 days, an email will be sent to the agency reminding them to process the destruct. Emails will be sent at 30, 60, and 90 days.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation

This ad hoc task will allow you to upload supporting documentation.

The screenshot shows the OnBase (020 - CAT) interface. The toolbar at the top contains various tasks, with 'Upload Supporting Documentation' highlighted by a red circle. The main window displays a 'Non-Auction SPN - 2014 - 003-LEGISLATIVE COUNCIL - DOCUMENTATION TEST DOCUMENT - 300130003' form. The form includes a table with columns for Agency Number, Division Number, Agency / Division Name, Contact Person, and Phone Number / Email. The table contains one row for 'TAG #03L3145, FILING CABINET LEGAL 4-DRWR'. The form also includes a section for 'Date Received' and 'By' with handwritten entries.

AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
003	000	LEGISLATIVE COUNCIL	DIANE MCLAIN	402-471-2226

The list of items on this form is this agency's request to deliver the items to State Surplus Property. We certify that to the best of our knowledge the items listed on this form are serviceable or in working order. The SPN # indicated above is annotated on each piece listed on this form.

# OF ITEMS (QTY)	DESCRIPTION	CONDITION
1	TAG #03L3145, FILING CABINET LEGAL 4-DRWR	

CAPITOL ORIGINAL...OCC requests direct transfer.

APPROVED DIRECT TRANSFER

THOMAS L. KASPAR 7-31-2013

Date Received: 7/31/2013 SPN ONLY
By: [Signature]

Report of Sale Receipt Number
Journal Entry

TO RECORD TRANSFER OF CAPITOL ORIGINAL ITEM FROM Agency CASE TO OCC PROGRAM

Delete Document

This will delete the item out of ECM. This task would be used if an item was accidentally added to ECM or if you decide to retain the item.

Upload Revised Adjustment

This ad hoc task is used to upload a revised copy of the SPN. This would be done if there were signatures added, or other changes made. The revised copy will be a revision of the original.

Send Email to Agency Adj- Agency Begin

This is for Surplus Only.

Adj – Surplus Administrator Review

Surplus Administrator Review

An email will be sent to Surplus when an item arrives in this queue.

The screenshot displays the OnBase (D20 - CAT) Surplus Administrator Review interface. The main window shows a 'Primary Viewer' of a 'SURPLUS PROPERTY NOTIFICATION FORM' for the 'STATE OF NEBRASKA' with SPN number 300130003. The form includes a table with one item: TAG #03L3145, FILING CABINET LEGAL 4-DRWR. The form is signed by Thomas L. Faspar on 7-31-2013. The interface also shows a sidebar with 'Life Cycles' and 'Inbox' views.

AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
003	000	LEGISLATIVE COUNCIL	DIANE MCCLAIN	402-471-2226

# OF ITEMS (QTY)	DESCRIPTION	CONDITION
1	TAG #03L3145, FILING CABINET LEGAL 4-DRWR	

APPROVED DIRECT TRANSFER
THOMAS L. FASPAR 7-31-2013

Surplus Property Use Only
Date Received: 7/31/2013 SPN ONLY
By: [Signature]
Report of Sale Receipt Number: _____
Journal Entry: _____

TO RECORD TRANSFER OF CAPITAL ORIGINAL ITEM FROM Agency CAT TO O.C.C. Program

Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation

This ad hoc task will allow you to upload supporting documentation.

Send Adj to Materiel Admin for Review

This ad hoc task will send notification to Materiel and transition the document to the Adj - Materiel Admin Review queue.

The screenshot shows the OnBase software interface. The top toolbar contains various action buttons, with 'Send Adj to Materiel Admin for Review' circled in black. The main window displays a document titled 'Non-Auction SPN - 2014 - 003-LEGISLATIVE COUNCIL - DOCUMENTATION TEST DOCUMENT - 300130003'. The document content includes a 'STATE OF NEBRASKA SURPLUS PROPERTY NOTIFICATION FORM' with handwritten notes and a signature.

DATE: 7/30/2013

STATE OF NEBRASKA
SURPLUS PROPERTY NOTIFICATION FORM NON-NIS ASSETS
SPN NUMBER: 300130003

AGENCY NUMBER: 003, DIVISION NUMBER: 000, AGENCY / DIVISION NAME: LEGISLATIVE COUNCIL, CONTACT PERSON: DIANE MCLAIN, PHONE NUMBER / EMAIL: 402-471-2226

OF ITEMS (QTY): 1, DESCRIPTION: TAG #03L3145, FILING CABINET LEGAL 4-DRWR, CONDITION: CAPITAL ORIGINAL - OCC requests direct transfer.

APPROVED DIRECT TRANSFER
THOMAS L. KASPAR 7-31-2013

Date Received: 7/31/2013 SPN ONLY
By: [Signature]

Surplus Property Use Only
Report of Sale Receipt Number
Journal Entry

TO RECORD TRANSFER OF CAPITAL ORIGINAL ITEM FROM Agency CASE TO O.C.C. PROGRAM

Return Document to Adj - Agency Begin

This ad hoc task will allow for a note to be created, related to the document, and transition the document back to the Adj - Agency Begin queue..

Upload Revised Adjustment

This ad hoc task is used to upload a revised copy of the Adjustment. This would be done if there were signatures added, or other changes made. The revised copy will be a revision of the original.

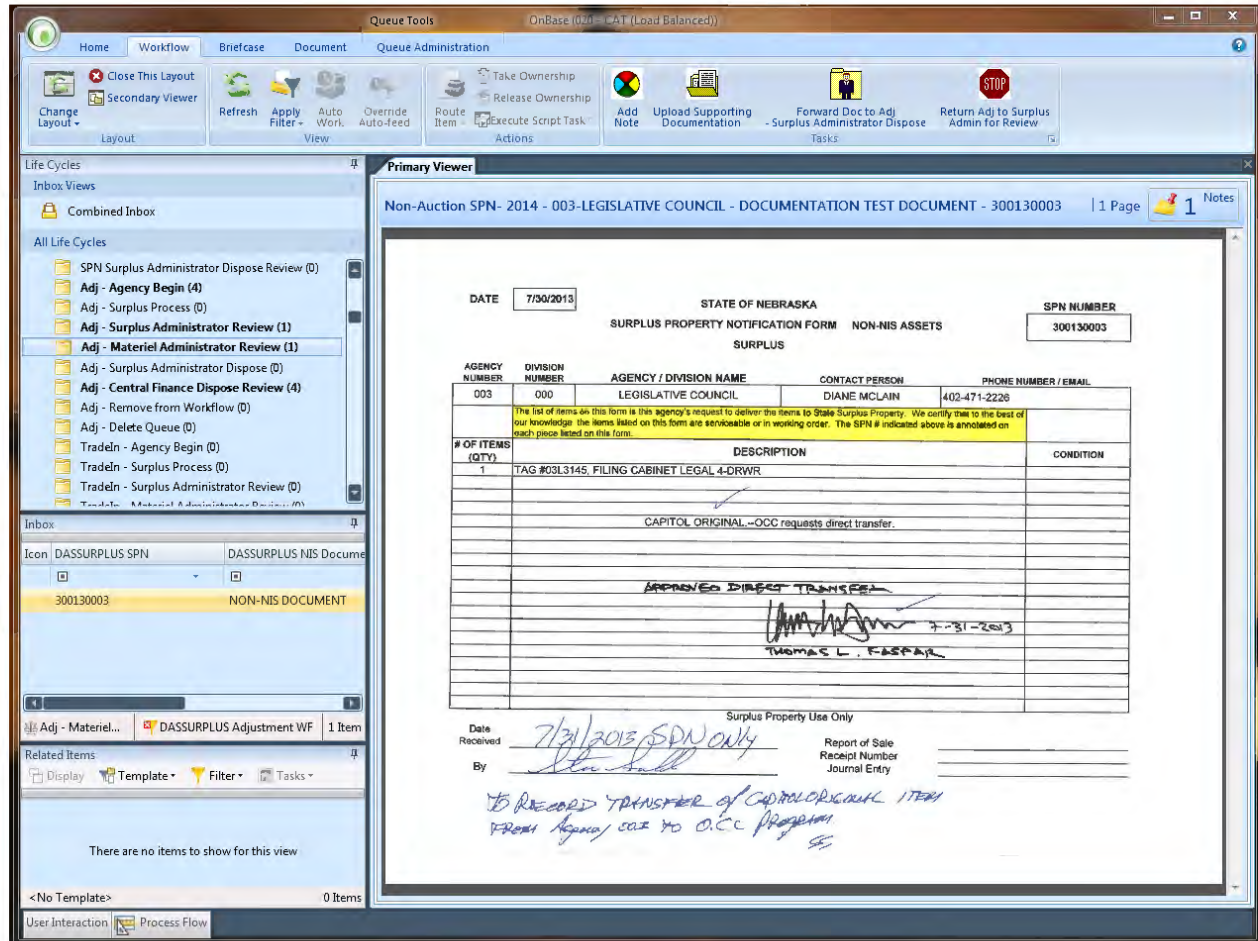
Send Adj to Remove from Workflow

The status will be updated to REMOVED. A note will be opened so information can be added about why the item is being removed. Be sure to click OK to save the note. A notification will be sent to Surplus to review the document. If they agree, it will be removed from workflow.

Adj – Materiel Administrator Review

Materiel Administrator Review

An email will be sent to Materiel when an item arrives in this queue.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation

This ad hoc task will allow you to upload supporting documentation.

Forward Doc to Adj - Surplus Administrator Dispose

This ad hoc task will send notification to Surplus Admin and transition the document to the Adj – Surplus Administrator Dispose queue.

The screenshot displays the OnBase CAT (Load Balanced) interface. The top toolbar contains several icons, with the 'Forward Doc to Adj - Surplus Administrator Dispose' icon circled in black. The main window shows a document titled 'Non-Auction SPN- 2014 - 003-LEGISLATIVE COUNCIL - DOCUMENTATION TEST DOCUMENT - 300130003'. The document form includes the following fields and content:

- DATE: 7/30/2013
- STATE OF NEBRASKA
- SURPLUS PROPERTY NOTIFICATION FORM - NON-NIS ASSETS
- SPN NUMBER: 300130003
- AGENCY NUMBER: 003, DIVISION NUMBER: 000, AGENCY / DIVISION NAME: LEGISLATIVE COUNCIL, CONTACT PERSON: DIANE MCCLAIN, PHONE NUMBER / EMAIL: 402-471-2226
- A table with one item:

# OF ITEMS (QTY)	DESCRIPTION	CONDITION
1	TAG #03L3145, FILING CABINET LEGAL 4-DRWR	
- Handwritten notes: 'CAPITOL ORIGINAL...OCC requests direct transfer.', 'APPROVED DIRECT TRANSFER', and 'TO RECORD TRANSFER OF CAPITOL ORIGINAL ITEM FROM Agency CASE TO OCC Program'.
- Signatures and dates: 'THOMAS L. KASPAR' and '7-31-2013'.

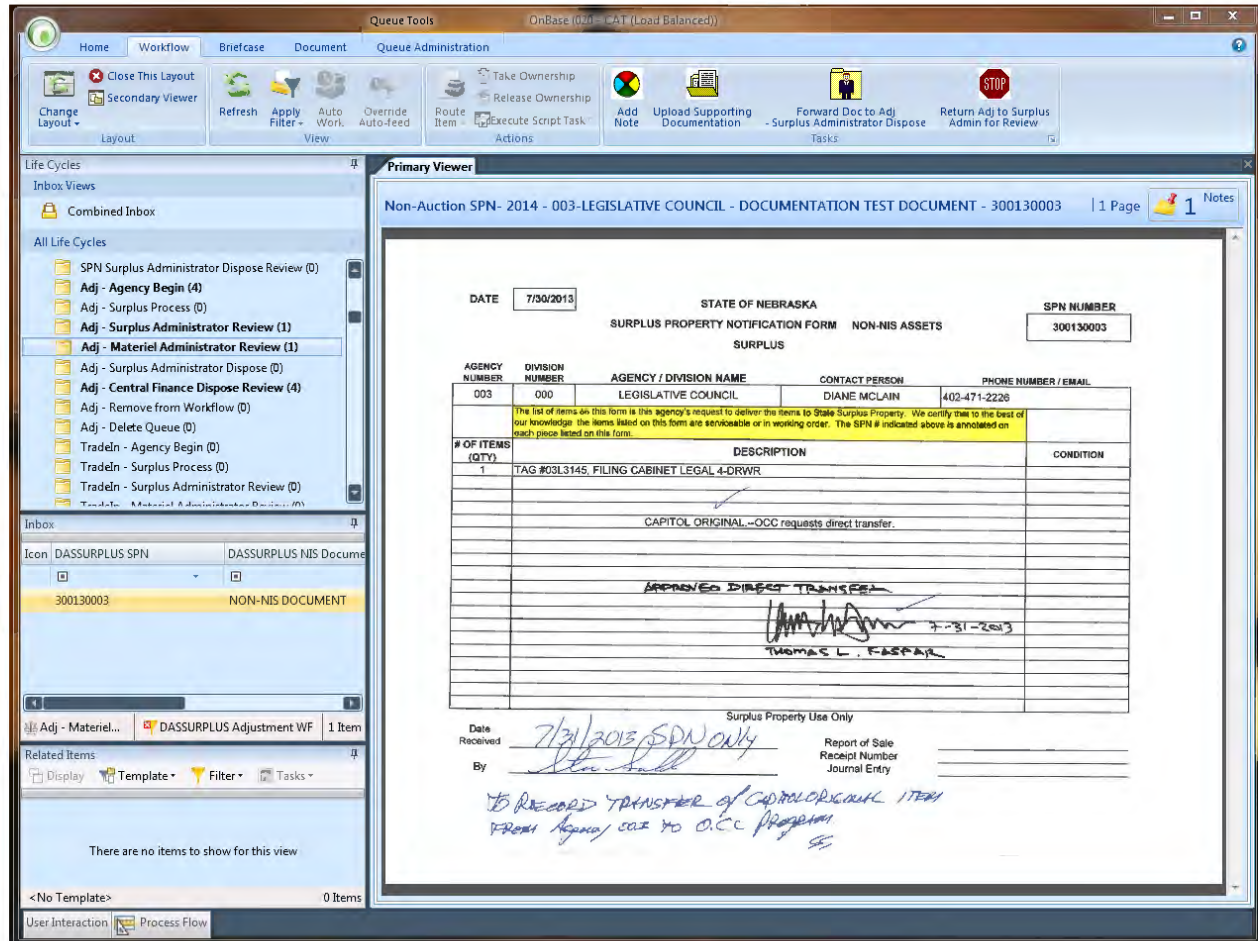
Return Adj to Surplus Admin for Review

This ad hoc task will allow for a note to be created, related to the document, and transition the document back to the Adj – Surplus Administrator Review queue.

Adj – Surplus Administrator Dispose

Surplus Administrator Dispose

An email will be sent to Surplus when an item arrives in this queue.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation

This ad hoc task will allow you to upload supporting documentation.

Upload Batch Posting Report

This ad hoc task allows for Batch Posting Page to be uploaded.

The screenshot shows the OnBase Queue Tools interface. The 'Queue Administration' menu is open, and the 'Upload Batch Posting Report' task is highlighted with a red circle. The main window displays a 'Non-Auction SPN - 2014 - 003-LEGISLATIVE COUNCIL - DOCUMENTATION TEST DOCUMENT - 300130003' form. The form includes the following information:

DATE: 7/30/2013
 STATE OF NEBRASKA
 SURPLUS PROPERTY NOTIFICATION FORM - NON-NIS ASSETS
 SPN NUMBER: 300130003

AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
003	000	LEGISLATIVE COUNCIL	DIANE MCCLAIN	402-471-2226

The list of items on this form is the agency's request to deliver the items to State Surplus Property. We certify that to the best of our knowledge, the items listed on this form are serviceable or in working order. The SPN # indicated above is annotated on each piece listed on this form.

# OF ITEMS (QTY)	DESCRIPTION	CONDITION
1	TAG #03L3145, FILING CABINET LEGAL 4-DRWR	

CAPITOL ORIGINAL...OCC requests direct transfer.

APPROVED DIRECT TRANSFER

THOMAS L. CASPAR
 7-31-2013

Surplus Property Use Only
 Date Received: 7/31/2013 SDN ONLY
 By: [Signature]

Report of Sale Receipt Number
 Journal Entry

TO RECORD TRANSFER OF CAPITOL ORIGINAL ITEMS FROM Agency COX TO OCC Program

Adj is Processed-Move to Review

This ad hoc task will send a batch posting email notification to Central Finance, then transition the document the Central Finance Dispose Review queue.

The screenshot shows the OnBase Queue Tools interface. The top toolbar contains various actions, with 'Adj is Processed-Move to Review' circled in red. The main window displays a document titled 'Non-Auction SPN- 2014 - 003-LEGISLATIVE COUNCIL - DOCUMENTATION TEST DOCUMENT - 300130003'. The document is a 'STATE OF NEBRASKA SURPLUS PROPERTY NOTIFICATION FORM' for 'LEGISLATIVE COUNCIL' with SPN number 300130003. The form includes a table with the following data:

AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
003	000	LEGISLATIVE COUNCIL	DIANE MCCLAIN	402-471-2228

# OF ITEMS (QTY)	DESCRIPTION	CONDITION
1	TAG #03L3145 FILING CABINET LEGAL 4-DRWR	

Handwritten notes on the form include: 'APPROVED DIRECT TRANSFER' and a signature 'THOMAS L. FARRAR' dated '7-31-2013'. At the bottom, there are handwritten notes: 'TO RECORD TRANSFER OF CAPITAL ORIGINAL ITEM FROM Agency CASE TO OCC Program'.

Adj – Central Finance Dispose Review

Central Finance Dispose Review

An email will be sent to Central Finance when an item arrives in this queue.

The screenshot displays the OnBase software interface. The main window is titled 'Primary Viewer' and shows a document titled 'Non-Auction SPN- 2014 - 003-LEGISLATIVE COUNCIL - DOCUMENTATION TEST DOCUMENT - 300130003'. The document is a 'SURPLUS PROPERTY NOTIFICATION FORM' for the 'STATE OF NEBRASKA'. It includes the following information:

- DATE: 7/30/2013
- STATE OF NEBRASKA
- SURPLUS PROPERTY NOTIFICATION FORM
- NON-NIS ASSETS
- SPN NUMBER: 300130003
- SURPLUS
- AGENCY NUMBER: 003
- DIVISION NUMBER: 000
- AGENCY / DIVISION NAME: LEGISLATIVE COUNCIL
- CONTACT PERSON: DIANE MCCLAIN
- PHONE NUMBER / EMAIL: 402-471-2226

The form contains a table with the following columns: # OF ITEMS (QTY), DESCRIPTION, and CONDITION. The table lists one item:

# OF ITEMS (QTY)	DESCRIPTION	CONDITION
1	TAG #03L3145, FILING CABINET LEGAL 4-DRWR	

Below the table, there is a section for 'Surplus Property Use Only' with fields for 'Date Received' (7/31/2013) and 'By' (Thomas L. Faspar). The form is signed by Thomas L. Faspar on 7-31-2013. The interface also shows a sidebar with 'Life Cycles' and 'Inbox' sections.

Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation

This ad hoc task will allow you to upload supporting documentation.

Post Adjustment Batch-Adj

This ad hoc task will send email notification to the Surplus Admins and transition the document to be removed from Workflow.

Queue Tools OnBase (020 - CAT (Load Balanced))

Home Workflow Briefcase Document Queue Administration

Close This Layout Secondary Viewer Change Layout Refresh Apply Filter Auto Work Override Auto-feed Route Item Execute Script Task Take Ownership Release Ownership Add Note Upload Supporting Document Post Adjustment Batch-Adj Return to Surplus Admin-Adj

Life Cycles
Inbox Views
Combined Inbox
All Life Cycles
SPN Surplus Administrator Dispose Review (0)
Adj - Agency Begin (4)
Adj - Surplus Process (0)
Adj - Surplus Administrator Review (1)
Adj - Materiel Administrator Review (0)
Adj - Surplus Administrator Dispose (0)
Adj - Central Finance Dispose Review (5)
Adj - Remove from Workflow (0)
Adj - Delete Queue (0)
TradeIn - Agency Begin (0)
TradeIn - Surplus Process (0)
TradeIn - Surplus Administrator Review (0)
TradeIn - Materiel Administrator Review (0)

Inbox
Icon DASSURPLUS SPN DASSURPLUS NIS Doc
300130003 NON-NIS DOCUMENT
6501130045 NON-NIS DOCUMENT
6501130050 NON-NIS DOCUMENT
6501130111 NON-NIS DOCUMENT
Adj - Central... DASSURPLUS Adjustment WF 5 Items

Primary Viewer
Non-Auction SPN- 2014 - 003-LEGISLATIVE COUNCIL - DOCUMENTATION TEST DOCUMENT - 300130003 | 1 Page 2 Notes

DATE 7/30/2013 STATE OF NEBRASKA SPN NUMBER 300130003
SURPLUS PROPERTY NOTIFICATION FORM NON-NIS ASSETS
SURPLUS

AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
003	000	LEGISLATIVE COUNCIL	DIANE MCLAIN	402-471-2226

The list of items on this form is this agency's request to deliver the items to State Surplus Property. We certify that to the best of our knowledge the items listed on this form are serviceable or in working order. The SPN # indicated above is annotated on each piece listed on this form.

# OF ITEMS (QTY)	DESCRIPTION	CONDITION
1	TAG #03L3145, FILING CABINET LEGAL 4-DRWR	

CAPITOL ORIGINAL...OCC requests direct transfer.

APPROVED DIRECT TRANSFER

THOMAS L. KASPAR 7-31-2013

Surplus Property Use Only
Date Received 7/31/2013 SPN ONLY
By [Signature]
Report of Sale Receipt Number
Journal Entry

TO RECORD TRANSFER OF CAPITOL ORIGINAL ITEMS FROM Agency case to O.C.C program

< No Template> 0 Items
User Interaction Process Flow

Return to Surplus Admin-Adj

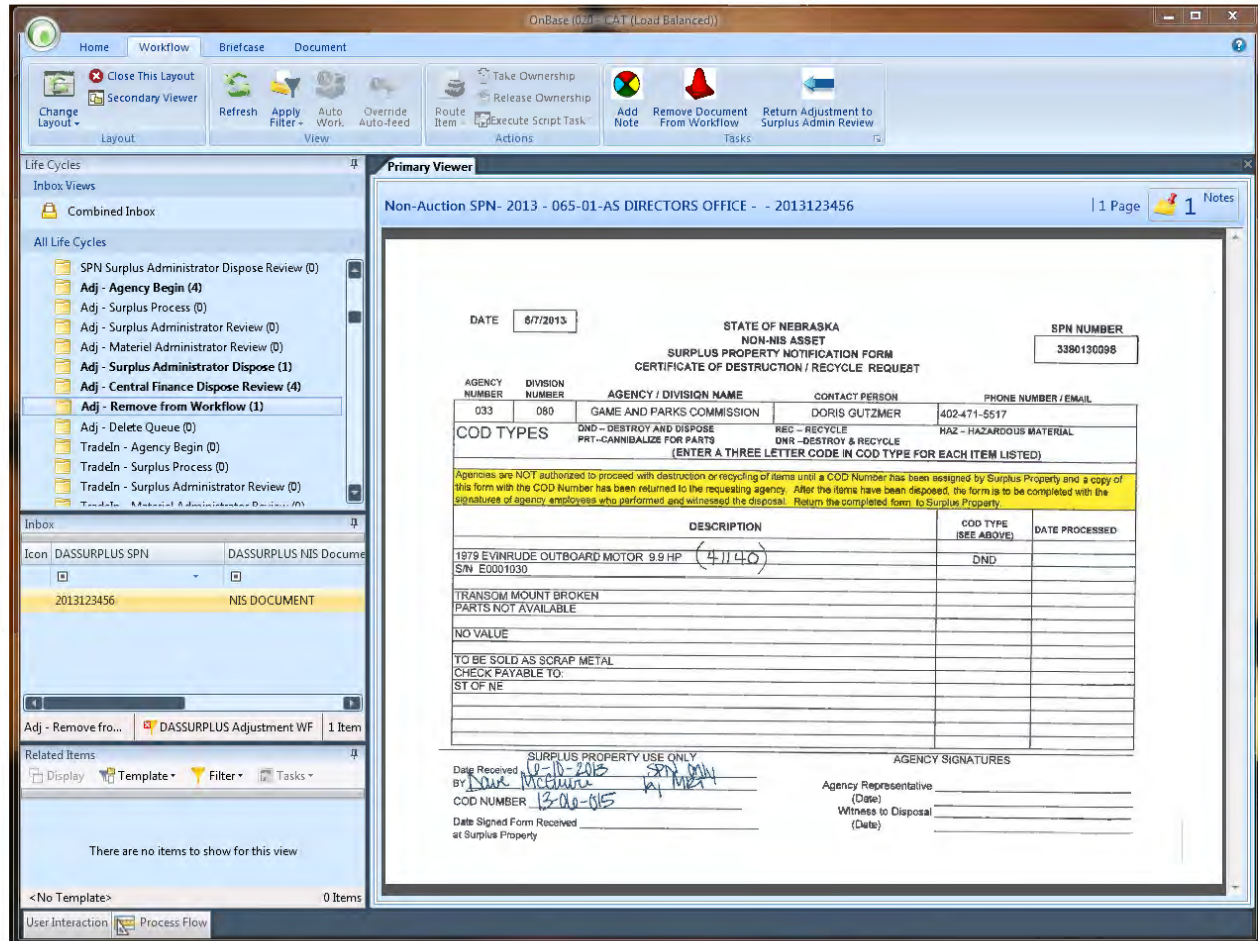
This ad hoc task will send an email notification to Surplus Admin, then transition the document back to the Surplus Administrator Dispose queue.

The screenshot shows the OnBase (D2D - CAT) software interface. The top toolbar contains various tasks, with 'Return to Surplus Admin-Adj' circled in red. The main window displays a 'Non-Auction SPN - 2014 - 003-LEGISLATIVE COUNCIL - DOCUMENTATION TEST DOCUMENT - 300130003' form. The form includes fields for DATE (7/30/2013), STATE OF NEBRASKA, and SPN NUMBER (300130003). It also contains a table for items with columns for AGENCY NUMBER, DIVISION NUMBER, AGENCY / DIVISION NAME, CONTACT PERSON, and PHONE NUMBER / EMAIL. The table lists one item: TAG #03L3145, FILING CABINET LEGAL 4-DRWR. The form is signed by Thomas L. Fespar on 7-31-2013. Handwritten notes at the bottom of the form read: 'TO RECORD TRANSFER OF CAPITOL ORIGINAL ITEM FROM Agency CASE TO O.C.C. Program'.

Adj - Remove from Workflow

Remove from Workflow

An email will be sent when an item arrives in this queue.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Remove Document From Workflow

This ad hoc task will remove the document from Workflow.

The screenshot shows the OnBase (021 - CAT (Load Balanced)) application window. The top toolbar contains several icons, with the 'Remove Document From Workflow' icon (a red pushpin) circled in red. The main window displays a document titled 'Non-Auction SPN- 2013 - 065-01-AS DIRECTORS OFFICE - - 2013123456'. The document content is a 'SURPLUS PROPERTY NOTIFICATION FORM' for the State of Nebraska, dated 8/7/2013, with SPN number 3390130098. The form includes a table for item descriptions and agency information.

Form Details:

DATE: 8/7/2013
 STATE OF NEBRASKA
 NON-NIS ASSET
 SURPLUS PROPERTY NOTIFICATION FORM
 CERTIFICATE OF DESTRUCTION / RECYCLE REQUEST
 SPN NUMBER: 3390130098

AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
033	080	GAME AND PARKS COMMISSION	DORIS GUTZMER	402-471-5517

COD TYPES

AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
DND		DESTROY AND DISPOSE	REG	RECYCLE
PRT		CANNIBALIZE FOR PARTS	DNR	DESTROY & RECYCLE

(ENTER A THREE LETTER CODE IN COD TYPE FOR EACH ITEM LISTED)

DESCRIPTION	COD TYPE (SEE ABOVE)	DATE PROCESSED
1979 EVINRUDE OUTBOARD MOTOR 9.9 HP (41140)	DND	
TRANSOM MOUNT BROKEN PARTS NOT AVAILABLE		
NO VALUE		
TO BE SOLD AS SCRAP METAL CHECK PAYABLE TO: ST OF NE		

SURPLUS PROPERTY USE ONLY

Date Received: 8-10-2013
 By: [Signature]
 COD NUMBER: 13-01-015
 Date Signed Form Received at Surplus Property: [Signature]

AGENCY SIGNATURES

Agency Representative (Date): _____
 Witness to Disposal (Date): _____

TradeIn – Agency Begin

To begin this process, you must first import/upload a document into the Enterprise Content Management (ECM) system. Please use the following instructions to do so:

Importing Documents

There are multiple ways to add documents to ECM. For this process, the main ways are:

- 1) Using Hyland Virtual Printer
- 2) Uploading or Importing Documents

After the documents are successfully loaded into ECM, they will need to be indexed.

The Document Type Group will be DASSURPLUS Filing Cabinet.

Select the document type DASSURPLUS FC Non-Auction SPN.

Set the key word DASSURPLUS Non-Auction Type = TRADE-IN.

Note: The key word NIS DOCUMENT will default to NIS DOCUMENT in workflow. Change to NON-NIS DOCUMENT if needed after it is in workflow.

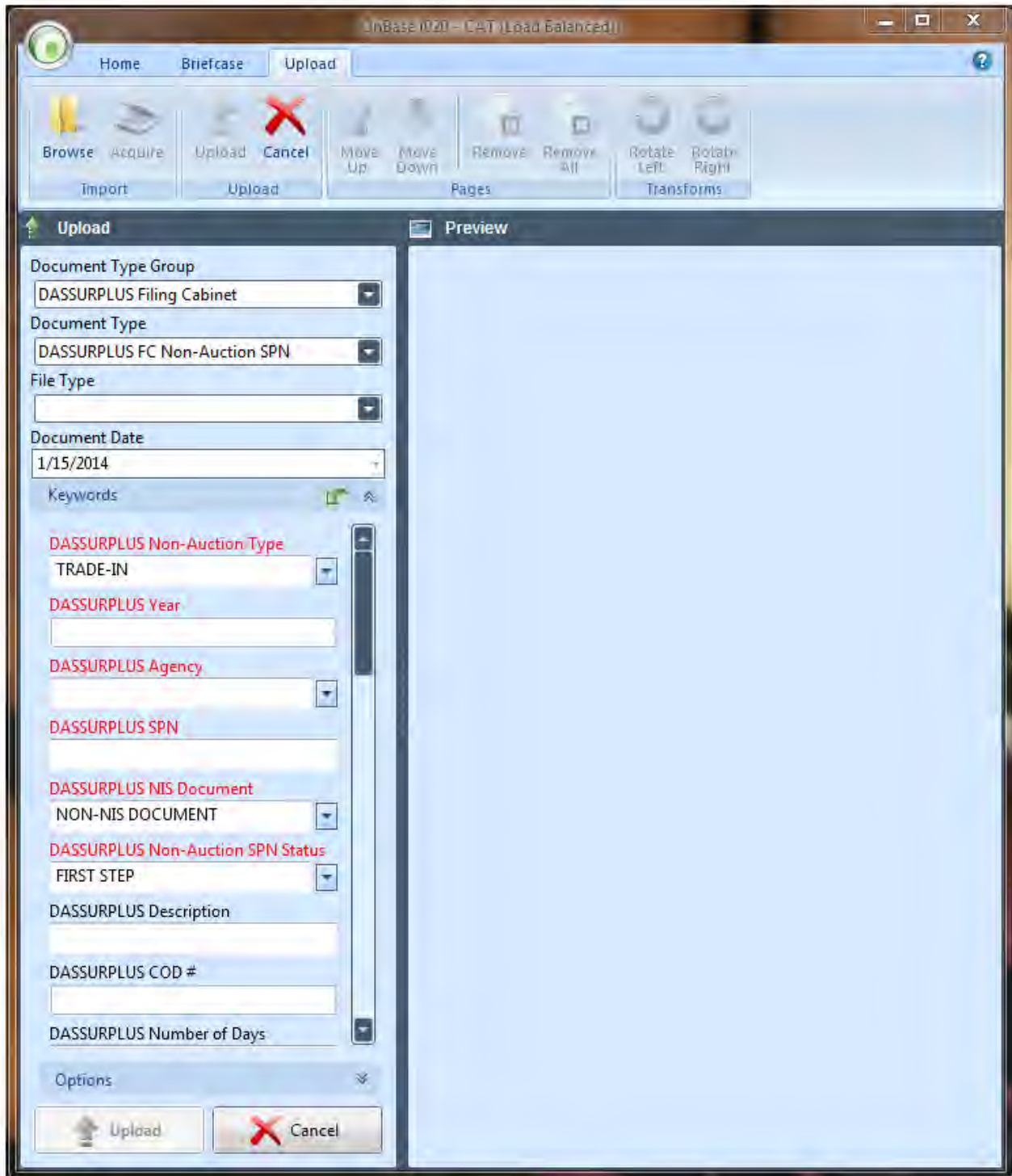
Hyland Virtual Printer

Once you have selected the document that you want to work with (ex: via Windows Explorer or an attachment in an email), select the Printer button and select the 'Hyland Virtual Printer' and depress the 'Print' button. **YOUR UNITY CLIENT MUST BE OPEN DURING THE PRINTING PROCESS.** You will be prompted to Perform Upload by the Unity Client flashing. Index the document by completing the information on the left hand side. **If items are in red, they are required!** When all information has been entered, depress the 'Upload' button.

Uploading or Importing Documents

Click on the Home button in the Unity Client, then the 'Upload' button. You will need to browse your computer to locate the document you wish to upload and double click to bring the document into the system or click Open. Index the document by completing the information on the left hand side. **If items are in red, they are required!** When all information has been entered, depress the 'Upload' button.

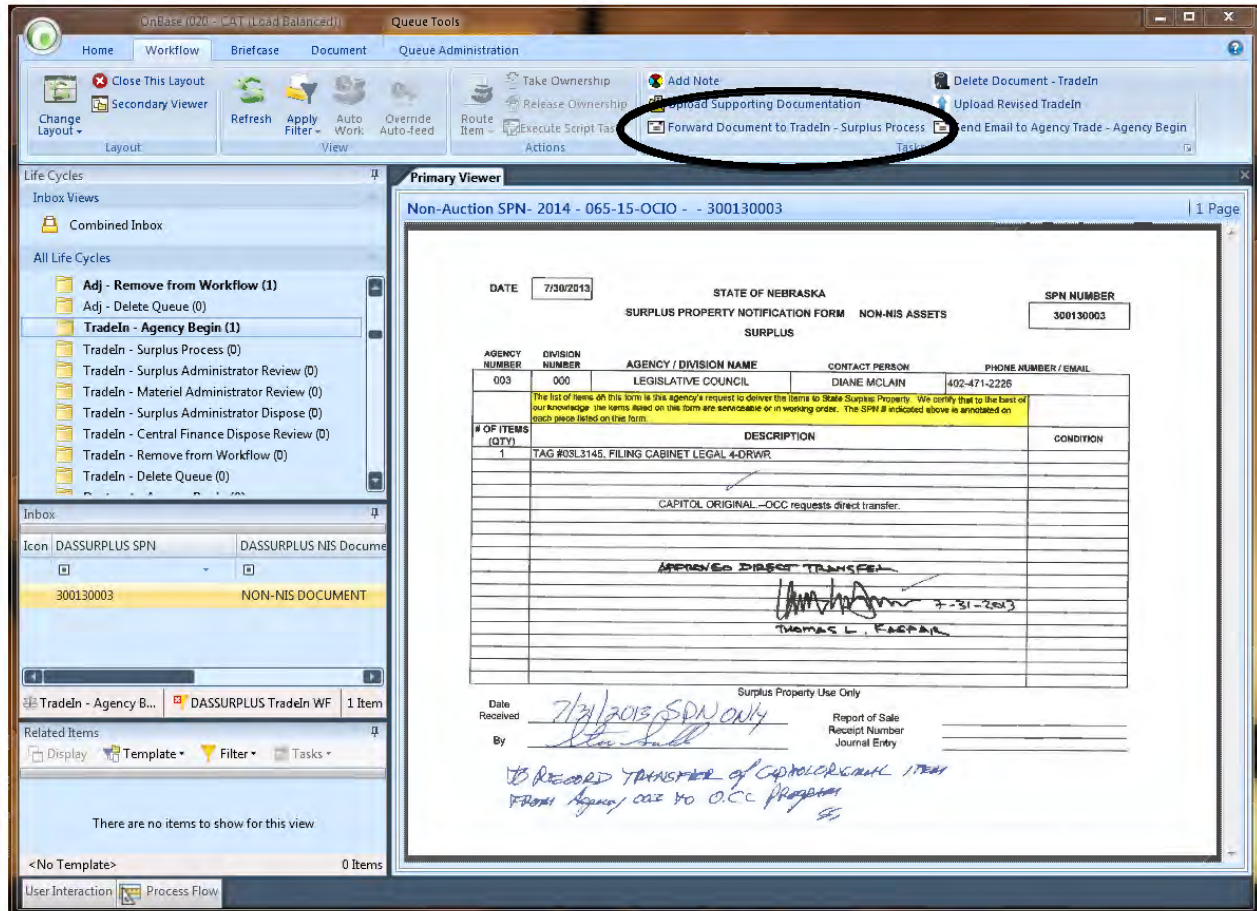
After a successful upload and an addition to the TradeIn-Agency Begin queue, you will receive an e-mail stating you have added a document to the workflow.



When you click on the 'Upload' button, this task window will appear. Click on the browse button in the upper left corner, and browse to the document you want to upload, which should be stored on your computer.

When you have selected the document, click on UPLOAD button at the bottom of the screen. The document should then be attached in the Related Ownership Items window.

In the queue TradeIn - Agency Begin, the document will have a status of FIRST STEP. Please click on Forward Document to TradeIn - Surplus Process in order to send the request to Surplus Property for Approval.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab. If you do not see the ribbon, refer to Queue Basics – Missing Icons. You may or may not have security to perform all of the Ad Hoc tasks listed. You may add a note at this point, upload supporting documentation, forward the document to Surplus Property for Approval or you can also delete the document, if your agency decides to retain the item.

If items stay in this queue for more than 30 days, an email will be sent to the agency reminding them to process the destruct. Emails will be sent at 30, 60, and 90 days.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation

This ad hoc task will allow you to upload supporting documentation.

The screenshot shows the OnBase (W20 - CAT - Load Balanced) Queue Tools interface. The 'Add Note' and 'Upload Supporting Documentation' tasks are highlighted in a red circle in the top toolbar. The main window displays a 'Non-Auction SPN- 2014 - 065-15-OCIO - - 300130003' document. The document includes a table with the following data:

AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
003	000	LEGISLATIVE COUNCIL	DIANE MCLAIN	402-471-2226

The table also includes columns for '# OF ITEMS (QTY)', 'DESCRIPTION', and 'CONDITION'. The first row shows 1 item: 'TAG #03L3145, FILING CABINET LEGAL 4-DRWR'. Below the table, there is a signature of Thomas L. Keppel dated 7/31/2013. The document also includes a 'Date Received' field with the date 7/31/2013 and a 'By' field with the name John Smith. A handwritten note at the bottom reads: 'TO RECORD TRANSFER OF CAPITOL LEGAL ITEM FROM Agency 003 TO O.C.C. Program'.

Delete Document

This will delete the item out of ECM. This task would be used if an item was accidentally added to ECM or if you decide to retain the item.

Upload Revised TradeIn

This ad hoc task is used to upload a revised copy of the SPN. This would be done if there were signatures added, or other changes made. The revised copy will be a revision of the original.

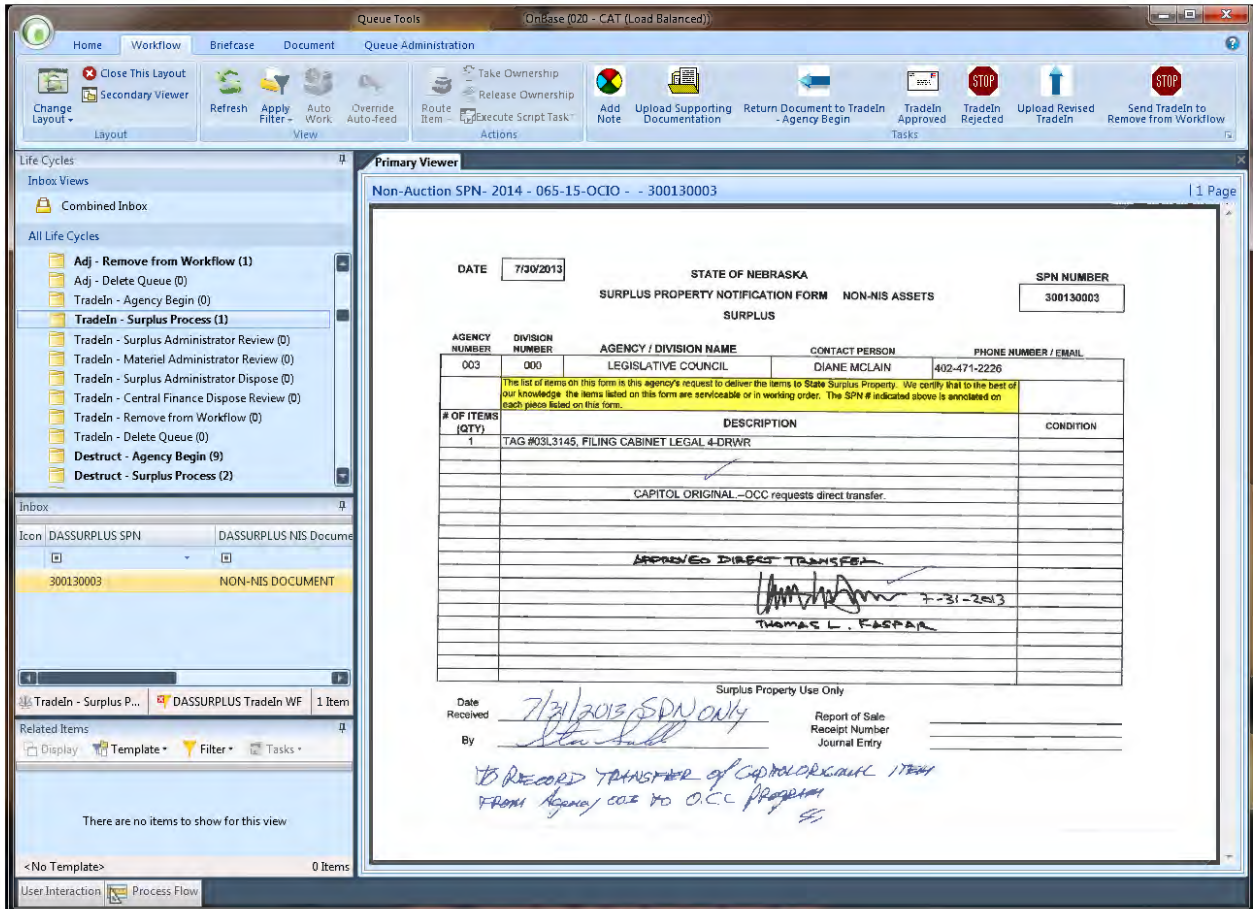
Send Email to Agency Trade - Agency Begin

This is for Surplus Only.

TradeIn – Surplus Process

Surplus Process

An email will be sent to Surplus when an item arrives in this queue.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation

This ad hoc task will allow you to upload supporting documentation.

TradeIn Approved

This ad hoc task will send notification to the Agency and transition the document to the TradeIn – Surplus Administrator Review queue.

The screenshot shows the Queue Tools application window. The title bar reads "Queue Tools Onbase (020 - CAT (Load Balanced))". The main toolbar contains several icons, with "TradeIn Approved" circled in red. The primary viewer displays a document titled "Non-Auction SPN- 2014 - 065-15-OCIO - - 300130003". The document is a "SURPLUS PROPERTY NOTIFICATION FORM" for the State of Nebraska, dated 7/30/2013. It lists an item: TAG #03L3145, FILING CABINET LEGAL 4-DRWR. The form is signed by Thomas L. Kasper on 7-31-2013. The interface includes a sidebar with "Life Cycles" and "Inbox Views", and a top toolbar with various actions like "TradeIn Approved" and "TradeIn Rejected".

Return Document to TradeIn - Agency Begin

This ad hoc task will allow for a note to be created, related to the document, and transition the document back to the TradeIn – Agency Begin queue..

TradeIn Rejected

This ad hoc task will set the document status to REJECTED, send an email notification to the agency and transition the document to TradeIn - Agency Begin.

Upload Revised TradeIn

This ad hoc task is used to upload a revised copy of the TradeIn. This would be done if there were signatures added, or other changes made. The revised copy will be a revision of the original.

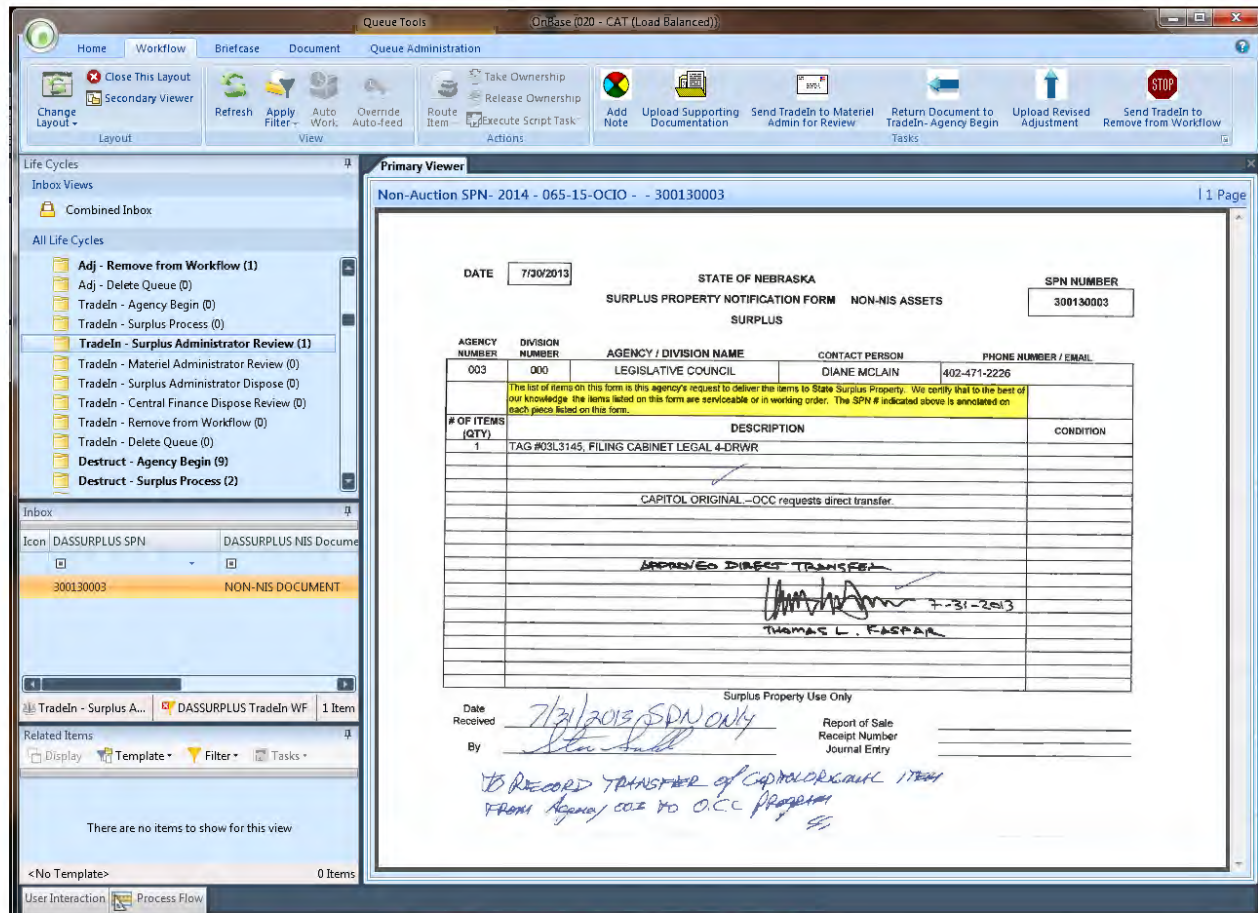
Send TradeIn to Remove from Workflow

The status will be updated to REMOVED. A note will be opened so information can be added about why the item is being removed. Be sure to click OK to save the note. A notification will be sent to Surplus to review the document. If they agree, it will be removed from workflow.

TradeIn – Surplus Administrator Review

Surplus Administrator Review

An email will be sent to Surplus when an item arrives in this queue.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

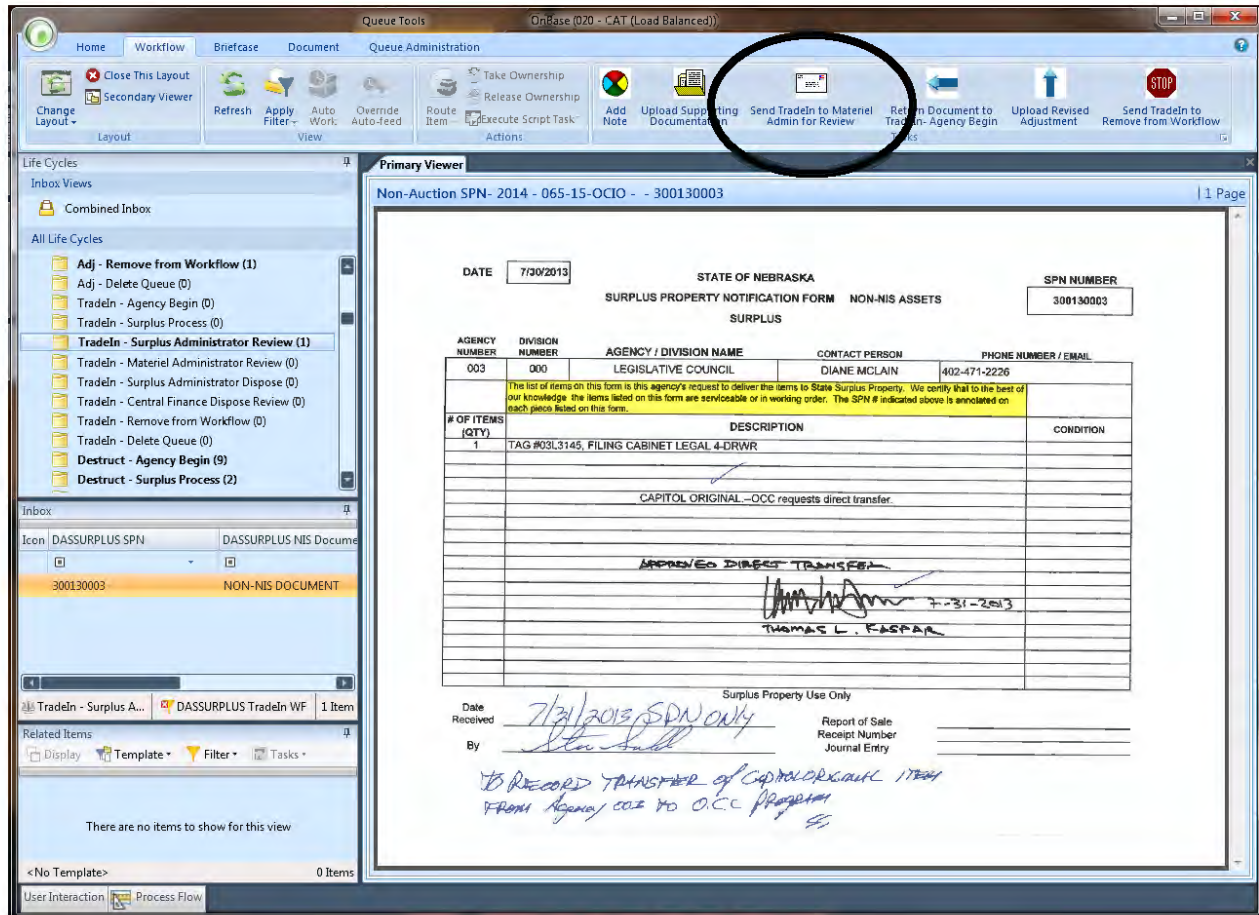
If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation

This ad hoc task will allow you to upload supporting documentation.

Send TradeIn to Materiel Admin for Review

This ad hoc task will send notification to Materiel and transition the document to the TradeIn - Materiel Admin Review queue.



Return Document to TradeIn - Agency Begin

This ad hoc task will allow for a note to be created, related to the document, and transition the document back to the Adj – Agency Begin queue..

Upload Revised TradeIn

This ad hoc task is used to upload a revised copy of the TradeIn. This would be done if there were signatures added, or other changes made. The revised copy will be a revision of the original.

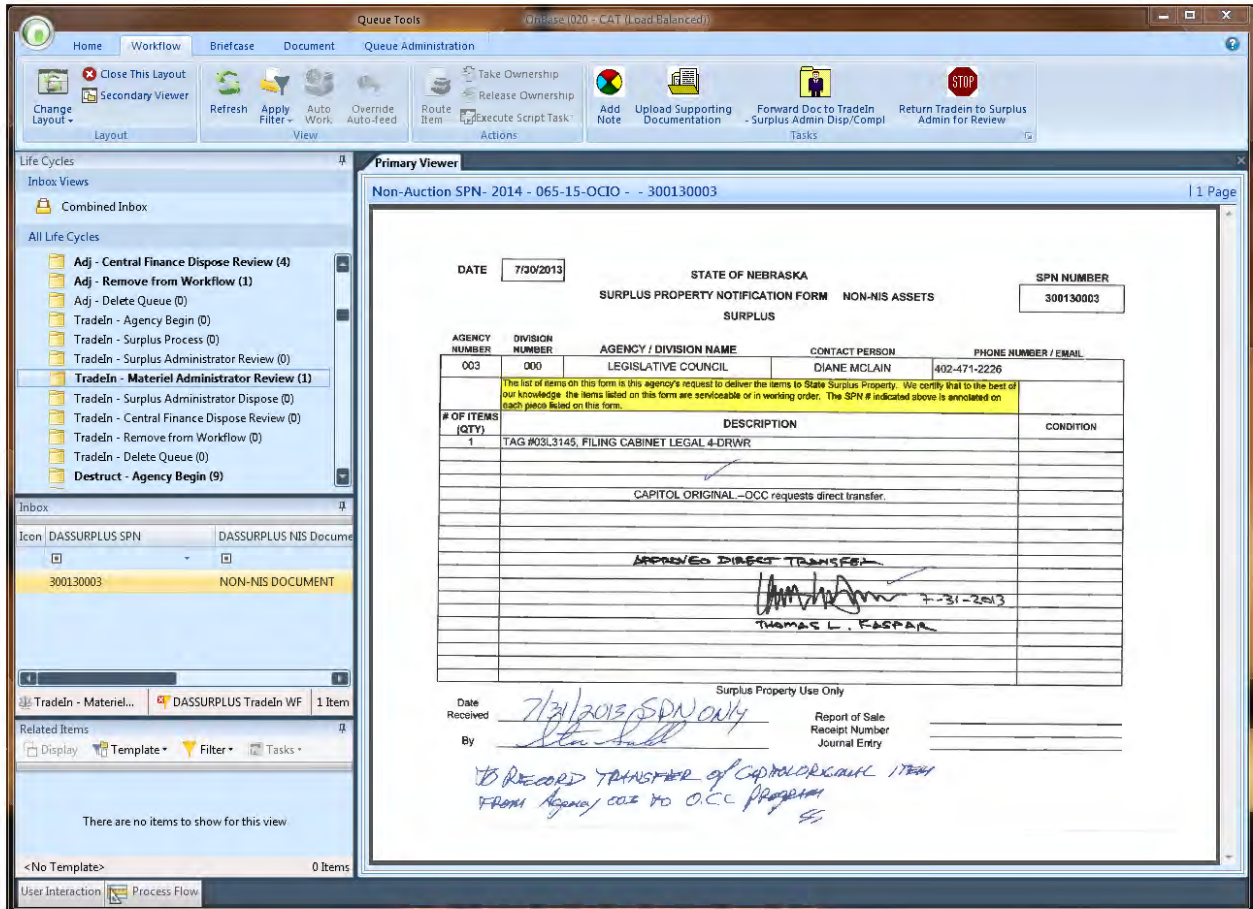
Send TradeIn to Remove from Workflow

The status will be updated to REMOVED. A note will be opened so information can be added about why the item is being removed. Be sure to click OK to save the note. A notification will be sent to Surplus to review the document. If they agree, it will be removed from workflow.

TradeIn – Materiel Administrator Review

Materiel Administrator Review

An email will be sent to Materiel when an item arrives in this queue.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation

This ad hoc task will allow you to upload supporting documentation.

Forward Doc to TradeIn - Surplus Administrator Disp/Compl

If the current Document is a Non-NIS, this ad hoc task will send notification to the Agency that the TradeIn is complete and will remove the document from Workflow. If it is a NIS, this will send notification to Surplus Admin for review and Transition the document to the TradeIn – Surplus Administrator Dispose queue.

The screenshot displays the OnBase software interface. The top toolbar contains several buttons, with 'Forward Doc to Adj - Surplus Administrator Dispose' circled in red. The main window shows a document titled 'Non-Auction SPN- 2014 - 003-LEGISLATIVE COUNCIL - DOCUMENTATION TEST DOCUMENT - 300130003'. The document is a 'STATE OF NEBRASKA SURPLUS PROPERTY NOTIFICATION FORM' for 'NON-NIS ASSETS'. The form includes the following information:

- DATE: 7/30/2013
- STATE OF NEBRASKA
- SURPLUS PROPERTY NOTIFICATION FORM
- NON-NIS ASSETS
- SPN NUMBER: 300130003
- AGENCY NUMBER: 003
- DIVISION NUMBER: 000
- AGENCY / DIVISION NAME: LEGISLATIVE COUNCIL
- CONTACT PERSON: DIANE MCCLAIN
- PHONE NUMBER / EMAIL: 402-471-2226

The form also contains a table with the following columns: # OF ITEMS (QTY), DESCRIPTION, and CONDITION. The table has one row with the following data:

# OF ITEMS (QTY)	DESCRIPTION	CONDITION
1	TAG #03L3145, FILING CABINET LEGAL 4-ORWR	

Handwritten notes and a signature are visible at the bottom of the form. The notes include 'APPROVED DIRECT TRANSFER' and 'TO RECORD TRANSFER OF CAPITOL ORIGINAL ITEM FROM Agency SOX TO O.C.C. Program'. The signature is dated 7-31-2013 and signed by THOMAS L. FASPAR.

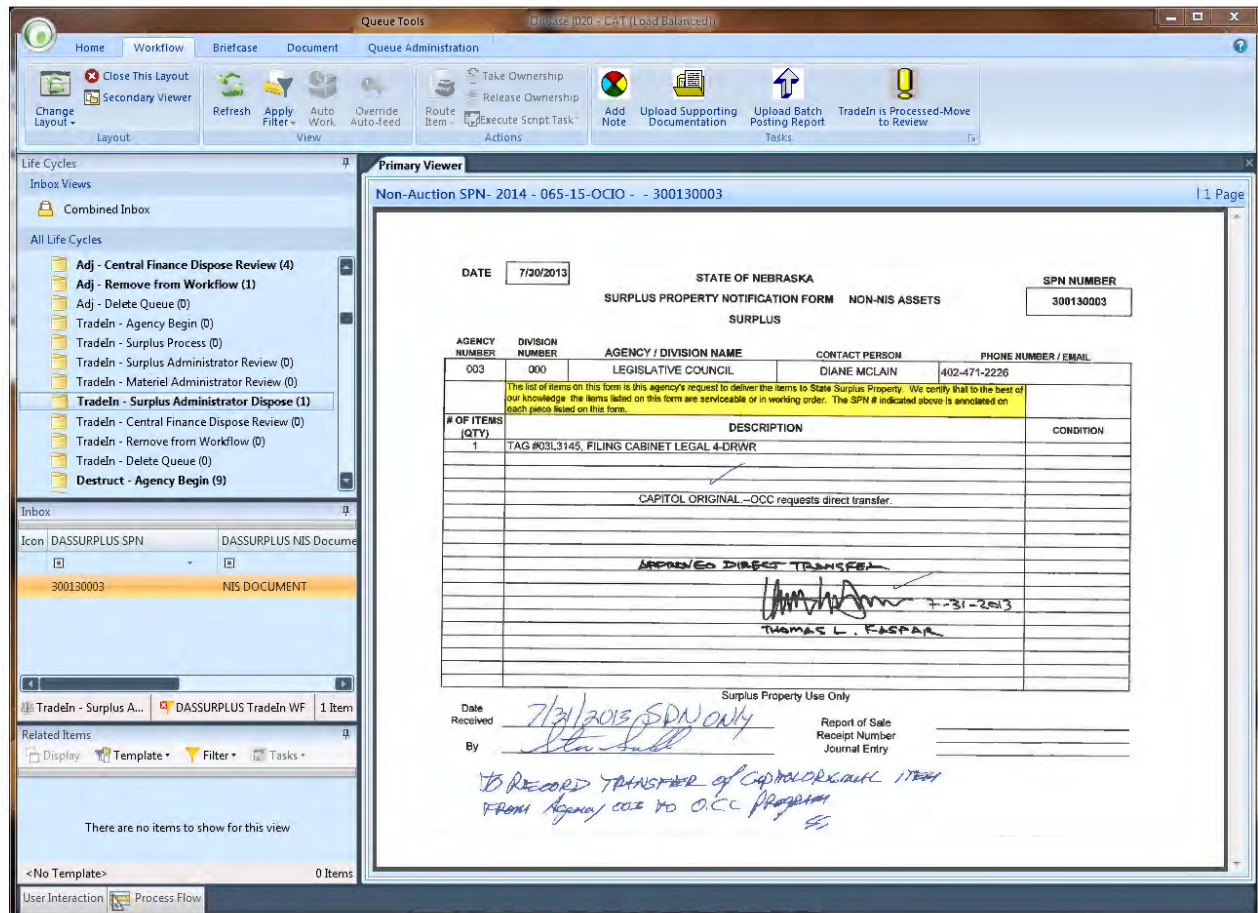
Return TradeIn to Surplus Admin for Review

This ad hoc task will allow for a note to be created, related to the document, and transition the document back to the TradeIn – Surplus Administrator Review queue.

TradeIn – Surplus Administrator Dispose

Surplus Administrator Dispose

An email will be sent to Surplus when an item arrives in this queue.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation

This ad hoc task will allow you to upload supporting documentation.

Upload Batch Posting Report

This ad hoc task allows for Batch Posting Page to be uploaded.

The screenshot shows a software application window titled 'Queue Tools' with a sub-window 'Queue Administration'. The toolbar contains several icons, with 'Upload Batch Posting Report' circled in red. The main area displays a 'Primary Viewer' for a 'Non-Auction SPN - 2014 - 065-15-OCIO - - 300130003'. The form includes a table with the following data:

AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
003	000	LEGISLATIVE COUNCIL	DIANE MCLAIN	402-471-2226

Below the table, there is a section for 'SURPLUS PROPERTY' with a table of items:

# OF ITEMS (QTY)	DESCRIPTION	CONDITION
1	TAG #03L3145, FILING CABINET LEGAL 4-DRWR	

Handwritten notes on the form include: 'APPROVED DIRECT TRANSFER', 'THOMAS L. KASPAR', '7-31-2013', and 'TO RECORD TRANSFER of CAPITOL ORIGINAL ITEM FROM Agency 003 TO O.C.C. PROGRAM'. The 'Date Received' is handwritten as '7/31/2013 SDN ONLY'.

TradeIn is Processed-Move to Review

This ad hoc task will send a batch posting email notification to Central Finance, then transition the document the Central Finance Dispose Review queue.

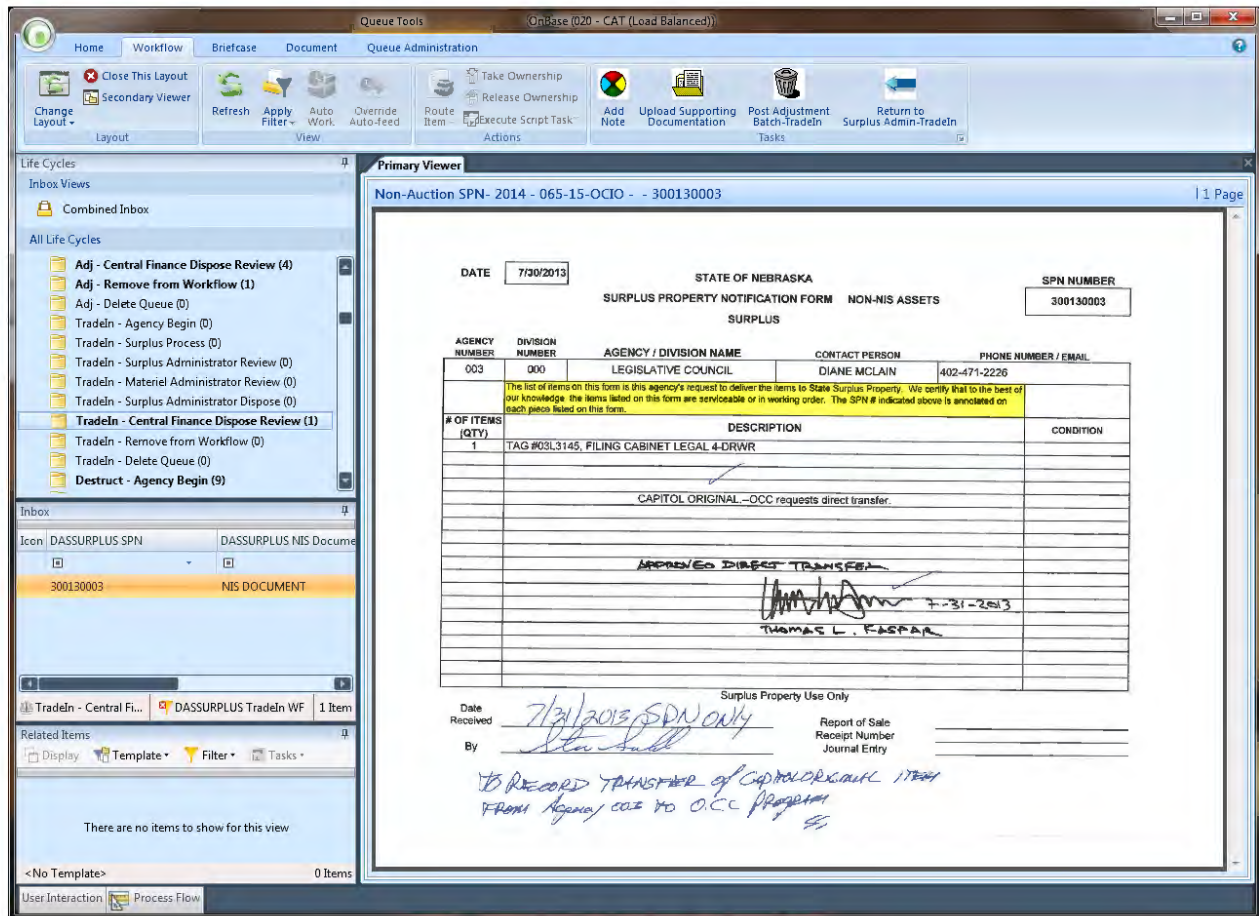
The screenshot shows the Queue Tools application window. The top toolbar contains various icons, with the 'TradeIn is Processed-Move to Review' icon circled in red. The main window displays a document titled 'Non-Auction SPN - 2014 - 065-15-OCIO - - 300130003'. The document is a 'SURPLUS PROPERTY NOTIFICATION FORM' for the State of Nebraska. The form includes the following information:

- DATE: 7/30/2013
- STATE OF NEBRASKA
- SURPLUS PROPERTY NOTIFICATION FORM NON-NIS ASSETS
- SPN NUMBER: 300130003
- SURPLUS
- AGENCY NUMBER: 003, DIVISION NUMBER: 000, AGENCY / DIVISION NAME: LEGISLATIVE COUNCIL, CONTACT PERSON: DIANE MCLAIN, PHONE NUMBER / EMAIL: 402-471-2226
- A table with one item: TAG #03L3145, FILING CABINET LEGAL 4-DRWR.
- Handwritten signature: THOMAS L. KASPAR, dated 7-31-2013.
- Handwritten notes: 'TO RECORD TRANSFER of CAPITOL ORIGINAL 17204 FROM Agency 003 to O.C. Program'.

TradeIn – Central Finance Dispose Review

Central Finance Dispose Review

An email will be sent to Central Finance when an item arrives in this queue.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your note. Be sure to click on OK to save the note.

Upload Supporting Documentation

This ad hoc task will allow you to upload supporting documentation.

Post Adjustment Batch-TradeIn

This ad hoc task will send email notification to the Surplus Admins and transition the document to be removed from Workflow.

The screenshot displays the OnBase (020 - CAT) software interface. The main window shows a 'Primary Viewer' of a 'Non-Auction SPN- 2014 - 065-15-OCIO - - 300130003'. The interface includes a navigation menu on the left, a toolbar at the top with a circled 'Upload Supporting Documentation' button, and a main form area with a table of items and handwritten notes.

STATE OF NEBRASKA
SURPLUS PROPERTY NOTIFICATION FORM NON-NIS ASSETS
SURPLUS

DATE: 7/30/2013
SPN NUMBER: 300130003

AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
003	000	LEGISLATIVE COUNCIL	DIANE MCLAIN	402-471-2226

OF ITEMS (QTY): 1
DESCRIPTION: TAG #03L3145, FILING CABINET LEGAL 4-DRWR
CONDITION:

CAPITOL ORIGINAL -OCC requests direct transfer.

APPROVED DIRECT TRANSFER
THOMAS L. KASPAR 7-31-2013

Date Received: 7/31/2013 SPN ONLY
By: [Signature]

Surplus Property Use Only
Report of Sale Receipt Number
Journal Entry

TO RECORD TRANSFER of CAPITOL LEGAL FROM FROM Agency 003 to OCC Property

Return to Surplus Admin-TradeIn

This ad hoc task will send an email notification to Surplus Admin, then transition the document back to the Surplus Administrator Dispose queue.

The screenshot shows the OnBase (Q20 - CAT) interface. In the top toolbar, the 'Return to Surplus Admin-TradeIn' button is circled. The main window displays a document titled 'Non-Auction SPN - 2014 - 065-15-OCIO - - 300130003'. The document is a 'SURPLUS PROPERTY NOTIFICATION FORM' for the State of Nebraska, dated 7/30/2013. The form includes a table with the following data:

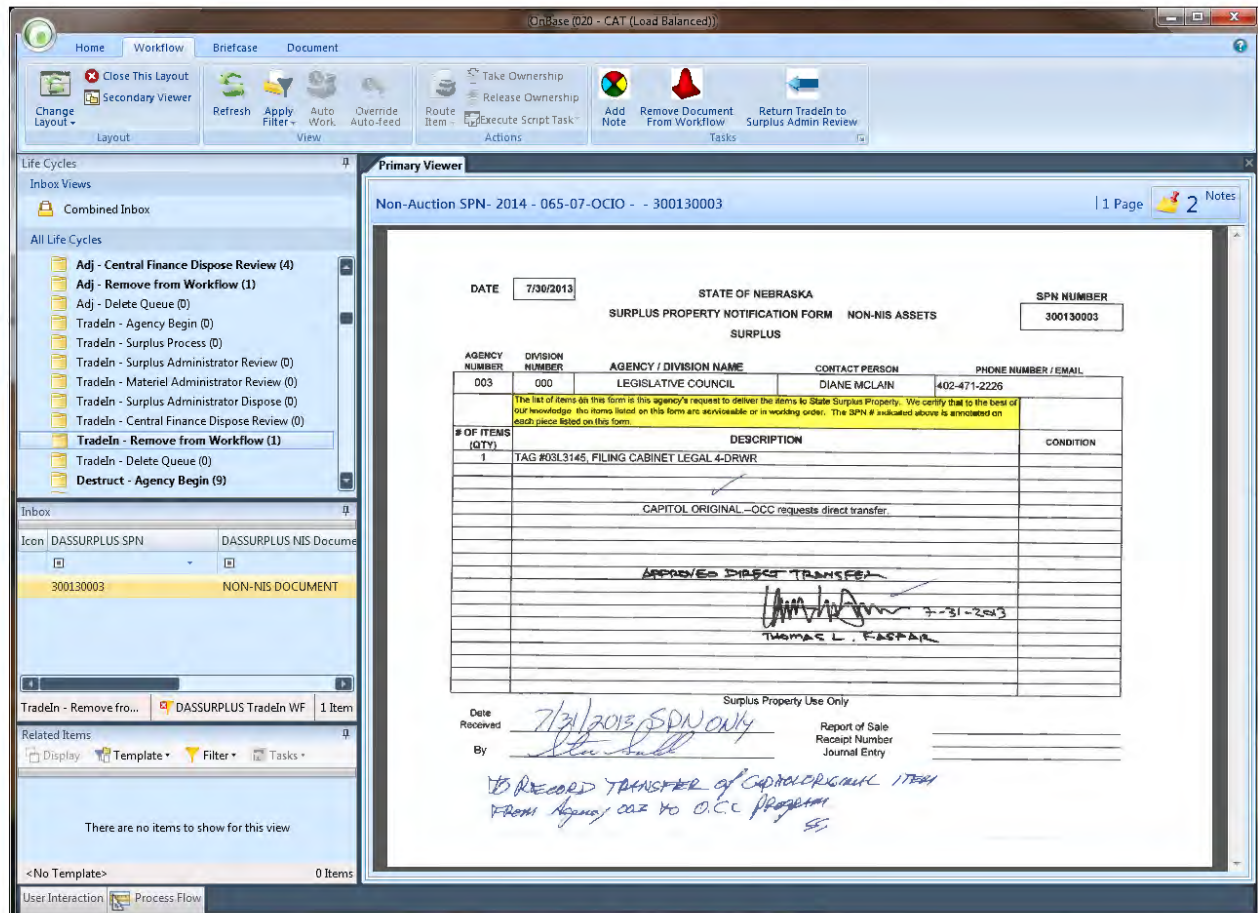
AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
003	000	LEGISLATIVE COUNCIL	DIANE MCLAIN	402-471-2226

The form also includes a section for 'SURPLUS PROPERTY USE ONLY' with handwritten notes: 'Date Received 7/31/2013 SPN ONLY', 'By [Signature]', and 'TO RECORD TRANSFER of CAPITOL ORIGINAL 17204 FROM Agency 003 to O.C. Program'. The 'Return to Surplus Admin-TradeIn' button in the toolbar is circled in red.

TradeIn – Remove from Workflow

Remove from Workflow

An email will be sent when an item arrives in this queue.



Ad Hoc Tasks

If you do not see your ad hoc tasks, try clicking on the Workflow tab.

If you do not see the ribbon, refer to Queue Basics – Missing Icons

You may or may not have security to perform all of the Ad Hoc tasks listed.

Add Note

If there is information you want to pass on for others to see, click on the Add Note to Document ad hoc task. A window will appear where you can add your transfer note. Be sure to click on OK to save the note.

Remove Document From Workflow

This ad hoc task will remove the document from Workflow.

The screenshot shows the OnBase (020 - CAT) interface. The 'Remove Document From Workflow' task is highlighted in a red circle in the top toolbar. The main window displays a 'SURPLUS PROPERTY NOTIFICATION FORM' for 'STATE OF NEBRASKA' with the following details:

DATE: 7/30/2013
STATE OF NEBRASKA
SURPLUS PROPERTY NOTIFICATION FORM NON-NIS ASSETS
SPN NUMBER: 300130003

AGENCY NUMBER	DIVISION NUMBER	AGENCY / DIVISION NAME	CONTACT PERSON	PHONE NUMBER / EMAIL
003	000	LEGISLATIVE COUNCIL	DIANE MCCLAIN	402-471-2226

The last of items on this form is this agency's request to deliver the items to State Surplus Property. We certify that to the best of our knowledge the items listed on this form are surplussable or in working order. The SPN # indicated above is associated on each piece listed on this form.

# OF ITEMS (QTY)	DESCRIPTION	CONDITION
1	TAG #03L3145, FILING CABINET LEGAL 4-DRWR	

CAPITOL ORIGINAL—OCC requests direct transfer.

APPROVED DIRECT TRANSFER
THOMAS L. FASPAR 7-31-2013

Date Received: 7/31/2013 SPN ONLY
By: [Signature]

Report of Sale Receipt Number
Journal Entry

TO RECORD TRANSFER OF CAPITOL ORIGINAL ITEM FROM Agency 003 TO O.C.C. Program

Return TradeIn to Surplus Admin Review

This task will return the document to the TradeIn – Surplus Administrator Review queue.