Quick Reference for Equipment Surplus Workflow

1. **Fill out [Equipment Surplus Excel Form](#) save the file.**
   - Go to fiscal.gmu.edu → Forms-> "Equipment Surplus Form"
   - Be sure to fill in ALL contact, pick up, and building/room information. Central receiving CANNOT pick up the equipment if they do not know who to contact with questions or where the equipment is located.
   - If the item has a George Mason University barcode, be sure to list this information as well as the serial/model information so that it is properly recorded for inventory purposes.

2. **Log in to [Banner Workflow](#) using your Internet Native Banner (INB) login.**
   - Use link above or go to https://patriotweb.gmu.edu/admin/ and click "Workflow" link
   - Enter your MESA network id and password (GMU email username and password) on the Central Authentication Service(CAS) page and go through Two-Factor Authentication (2FA) to access workflow.

     NOTE*: GMU affiliates and some of part time employees will not have workflow accounts and they will need to ask department equipment liaison (http://fiscal.gmu.edu/wp-content/uploads/2014/11/EquipmentLiaisonforWeb.pdf) to submit surplus request on behalf of them. For all other login issues, please contact fast@gmu.edu or ext 3-5250.

3. **Initiate a workflow instance. Under** **button in left hand menu go to "My Process" then click "FIN_Equipment Surplus Processing."**
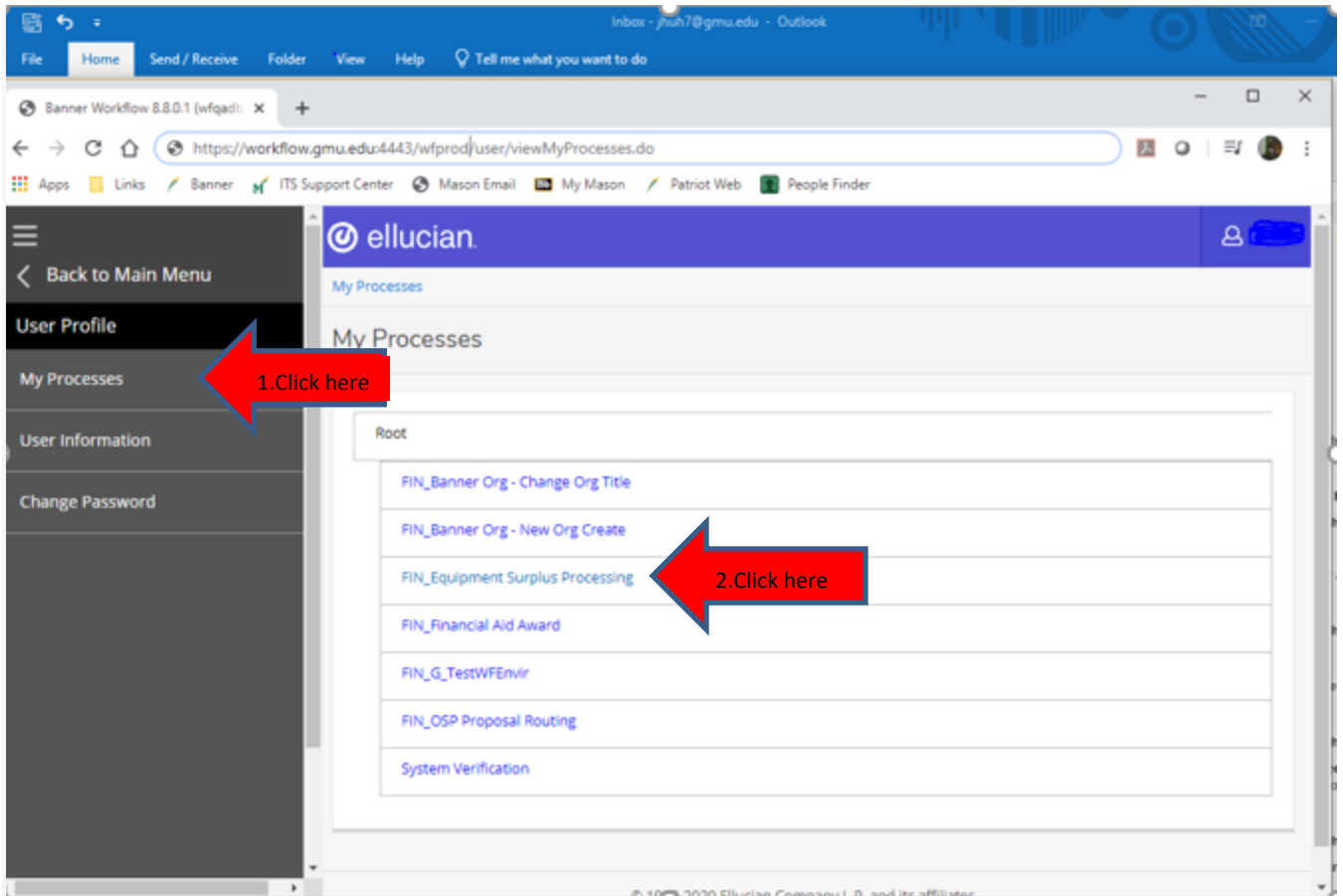
- On "Start Workflow" page, enter workflow specific name using the following format and click ▶ Start Workflow . This is to assist in the look-up process if needed in the future.

ES-[Mesa Login]-[Department Name]-[Date in YYMMDD format]

Ex: ES-GMASON-FISCAL SERVICES-200130

- **Priority, Notes, and Attachment are NOT necessary** in this step of the process.

4. **Refresh the Worklist link or browser refresh button until your Workflow Instance appears. Fill out the online form, attach saved excel file, and submit.**
   - Please be sure to add your Equipment Liaison's Mesa ID in the "Equipment Liaison Mesa Login ID" field so that they will also have a record of the surplus submission. Put your own Mesa ID ONLY if you are the Equipment Liaison for your department.
   - Click ⌀ Attach File link at the end of form and select previously saved Equipment Surplus Excel Form from step #1. Be sure to select the radio button on the form entitled "EquipmentSurplusForm" and then upload the file. This is a very important step to be sure the spreadsheet is attached to the workflow.***
   - When the form is complete, press "Complete" button to send the request to Surplus Team. ** DO NOT press "Save & Close" unless you need to come back to the form later to complete it. If "Save & Close" button is pressed, the request is not being passed to Surplus Team.
   - Errors will be sent via email if anything has been submitted incorrectly. The emails will direct the user as to how to properly correct the submission.

5. **All parties including will receive a confirmation email** once workflow initiator, Central Receiving and Fixed Assets have completed their portion of the Surplus Workflow. Any unexpected changes will be noted in the comment fields for future documentation.

For additional information, review the Equipment Surplus-Initiator Guide.docx or contact Fixed Assets ext 3-4456 or assets@gmu.edu with any questions regarding this process.