A Quick Guide to Using AAMS/CFL/GSAXcess
(Reporting Excess Property)
www.gsaxcess.gov

1. **Background.** USDA uses GSA's Agency Asset Management System (AAMS) to report excess for USDA screening prior to excess becoming available for nationwide screening through GSAXcess. AAMS is a module within GSAXcess. The primary benefits of AAMS/GSAXcess are:

- comply with regulations to report/screen excess property,
- view available excess before purchasing new equipment,
- automated "want list" (search) for available excess,
- report exchange/sale property,
- report IT equipment for Computers for Learning (CFL),
- link for submitting pictures,
- generate electronic transfer documents, and
- receive e-mail notifications when users request property.

AAMS does not carry over property data from PMIS/PROP (or CPAIS-PP). Users must key in all required property data. Users are also responsible for allocating and transferring excess property that a customer requests during USDA's internal screening period in AAMS and during CFL screening.

2. **Establishing Users.** Headquarters (ARS, AFM, APD, PSSB) will process requests for access to the system. Users should request access through the Area Property Management Officer (APMO). **Users may have multiple access levels. Levels are:**

- Report and Allocate Excess (USDA and CFL)
- Search and Select Excess (only submit a freeze request)

To request access, submit the following information, via e-mail to Cheryl.Brumback@ars.usda.gov:

- Name,
- E-mail address,
- Fax Number,
- Telephone Number,
- Activity Address Code,
- Access level (report-allocate and/or search-select), and
- User's approving official (This is the individual authorized to approve the transfer request for selected property. Users may not authorize their own requests)

AAMS/GSAXcess automatically forwards an e-mail notification directly to the new user with the user's identification code and temporary password.

The system is automatically set-up to **delete any User ID for non-use during a 6-month period.** Users will receive an e-mail notification prior to deleting the ID. Immediately accessing the system will avoid having the ID deleted.

3. Reporting Excess. Follow property management policies prior to reporting excess; ensuring <u>appropriate approvals and supporting documentation exist</u>. To report excess:

- select the AAMS-USDA link at the top of the screen,
- select "Create Report" link under Report Property, and
- follow the field layout and key in the required information.

AAMS/GSAXcess highlights mandatory fields with an asterisk (*) and provides a drop down menu for fields in blue. Most all fields are self-explanatory. Users may select the "Help" button to the right of the screen to access the on-line Help menu, if needed.

4. Required Fields. To help ensure consistent data, listed below is a brief description of key required fields.

A. Item Control Number. The Item Control Number is the excess report number. The format is:

- ➢ Activity Address Code (pre-populated based on your access profile),
- ➢ Julian Date, (system generated),
- ➢ Line Item Number (0001, 0002, 0003, etc.), and
- ➢ Additional suffix for the line item number for submitting pictures (if required).

Do not change the pre-populated Activity Address Code (AAC) used for the Item Control Number. The AAC should be the AAC of the individual submitting the report. It is not where the property is located. The AAC is tied to the user.

B. Upload Pictures. (JAVA software is needed to upload pictures). The name of the picture must match the report number with the letter "A" behind the report number (example: 12315962650001A). Picture files must end in "jpg". If you have multiple pictures for the same item you will start with the letter "A" and for the second picture use "B" (12315962650001B), for the third picture "C" (123A5962650001C), etc. Users may submit up to 12 pictures per item. Users may use the link within the excess report or after submitting the excess report, return to the main menu and select "Upload Pictures". To upload pictures, enter the following user name and password:

- ➢ **User Name: xcessupld**
- ➢ **Password: send2see**

Pictures are not immediate available for viewing. GSA reviews all pictures to ensure they are clear and appropriate. Pictures are available within 24-48 hours after submitting the report.

C. Reporting Agency Address. Key in the address/name of the individual who receives transfer, sale or disposal notifications. **This is the property officer.**

D. Point of Contact. Key in the name, telephone, fax, and email address of the technical contact that can answers regarding specific information about the property.

E. Property Location. Key in the specific address where the property is located. (Potential customers use the address to determine whether they can easily pick-up or transfer the item.)

F. Property Custodian. Key in the name, telephone, fax, and email address of the property custodian.

Users must complete both the property contact information and the custodial contact information, regardless if the information is the same.

Ensure all contact information is accurate, **specifically e-mail, telephone, and fax numbers.** The system forwards property transfers or notices via e-mail or fax. Potential customers call point of contacts to verify the property information, condition, etc.

G. Property Type. Most **all excess** property falls into the category of "Regular Utilization and Donation Screening, No Special Requirements". The exception is "exchange/sale" property (primarily for vehicles). For "**excess**", the default is "No Special Requirements."

H. If Property Is Exchange/Sale, Select "Exceptions". ARS may only retain sale proceeds for exchange/sale property. When selecting "exchange/sale", users must complete **"Agency Location Code" and "Appropriation/Fund to be Reimbursed"**. (Work with your Finance Office for correct entries in these fields. This is how GSA/Treasury deposits sales proceeds.)

I. Agency Control Number. Key in the AG number (NFC-ID number) for accountable property. For non-accountable property, users may leave this field blank or key in a number that is specific to the user.

J. Federal Supply Class. Key in the Federal Supply Classification (FSC) for the item.

> **J-1. When users select FSC 23 (vehicles**), the system will display additional fields specific to motor vehicles. They are:
> - number of cylinders,
> - model year,
> - fuel type (with a drop down menu),
> - body style (with a drop down menu)
> - VIN,
> - Make,
> - Model,
> - estimated mileage,
> - color (with a drop down menu), and
> - color gradient (with a drop down menu).

J-2. When users select FSC 70 (ADP equipment), the system will display additional fields for the Computers for Learning (CFL) Module. (See the CFL website for additional information: **www.computersforlearning.gov**

After required 14-day USDA screening, excess ADP equipment transfers to the CFL Module, which allows schools (**public and private Pre-K through 12th grade**) to screen ADP excess for 7 days before it is available in GSAXcess for the remaining 14 days.

Because of the specific information requested for ADP, users should work with their IT staff to obtain accurate information. AAMS/GSAXcess provides drop down menus for new fields, based on the type of equipment reported. The following ADP fields are mandatory: **FSC; Hardware Type; Equipment Type; Processor; Make; Hard Disk Status**

There are 3 optional fields that also have a drop down menu. They are: Processing Speed; RAM; and Hard Disk Size.

FSC and Hardware Type. The Hardware Type is based on the FSC. When reporting CPU's Desktops, Laptops, Servers, or Other PCs, use FSC Code 7010, 7020, 7021, 7022, 7030, 7035, 7040, 7045, or 7050.

When reporting Printers, Monitors, Scanners, Modems, Mouse, or Other ADP, use FSC 7025.

Equipment Type. Options are: Windows or Apple.

Make. Based on your selection under Hardware and Equipment, the "Make" field will also have a pull down menu (Compaq, Dell, Emachine, Gateway, HP, IBM, Sony, Cisnet, Other)

When reporting "Printers" distinguish between Inkjet B&W or Color, Laser B&W or Color, or Other.

When reporting Monitors, distinguish between CRT-Flat, CRT-Standard, LCD, or Other.

Hard Disk Status. Examples are: Sanitized, Not Sanitized, Removed, or Demagnetized.

Processor (Optional). Examples are Intel Pentium, Pentium III, Pentium 4, Pentium Pro, Celeron, etc.

Processing Speed (Optional). Examples are <400 mhz, 2 GHz or more, 3 GHz, etc.

RAM (Optional). Examples are <96, <128, <512, 1GB, etc.

Hard Disk Size (Optional). Examples are 5GB, 30GB, 80GB, 120GB, etc.

Where appropriate change any "unknown" field that the system may have pre-populated.

K. Is Equipment for CFL. The default is **"YES" –** do not change this (unless you are using the Stevenson-Wydler Donation Program**).** Use this option whether or not you have a known CFL school. If you have a known school, ensure that the school has already registered with the CFL by using the "School Search" option under the CFL Menu. Refer schools to the CFL website to register: **www.computersforlearning.gov.**

L. Federal Asset Sales Center: The default is **"GSA"**. <u>GSA is our required source for selling exchange/sale or surplus property.</u>

M. Make. Include the make (may be different from the model)

N. Item Name. Key in the descriptive item name. Use the "Property Description" field to key in additional detailed information.

O. Original Acquisition Cost (per unit). Key in the original acquisition cost of each unit.

P. Condition. Select the option that closely describes the item.   Use the "Property Description" field to provide further details.

Q. Demilitarization. Most excess does not require demilitarization. **Select A.**

R. Drop After Internal Screening. The system default is **"No",** which allows the report to transfer to CFL and GSAXcess after USDA screening. **If the user is reporting excess for USDA screening only (for transfers under Steven-Wydler, or processing transfers under FAIR, change to "Yes".** When changed to "Yes", the report **will not transfer** to CFL, GSAXcess, or GSA Auctions.

S. Excess Release Date. System generated. This is the date when USDA's 15-day internal screening is completed. Users should monitor this date to ensure the report properly transfers to GSAXcess.

T. Surplus Release Date. System generated. The system will generate this date after the report transfers from USDA's internal screening in AAMS to GSAXcess. Reports remain in GSAXcess for 21 days. Users should monitor this date to determine when excess transfers to Sales.

U. Property Description. Key in the **"serial number(s)"** and any other detailed descriptive information. The more detailed information provided, the greater the opportunity for re-use.

V. Submit. Select **"Submit**" at the bottom of the screen to submit the report.

5. Submitting Multiple Reports. If users have multiple line items or reports to process, after the first submission, the system allows users to (these options are displayed at the bottom of the screen):

Retain Common Data: retains the property and custodial point of contact data, or
Re-Display All Data: retains the points of contact data and the primary property data.

6. Similar Items. Users may submit similar excess items by grouping **similar** items together (same description, mfg, model). Key in the correct quantity and the acquisition cost **per unit**.

7. Modify or Delete Report. Under the "Report Property" menu, users may modify or delete excess reports as appropriate while the report is in **USDA screening** only. Follow the screen prompts. Only the user who originally submitted the report may modify or delete a report. For any change/removal required after USDA screening, please contact your regional GSA office.

8. Review Report. Under the "Report Property" menu, users may generate a report listing current excess reports by an Activity Address Code. The report will list the Item Control Number, Item Description, and Status. Status terms are:

> ➢ Internal – in USDA screening
> ➢ Excess – in GSA screening
> ➢ Transferred - transferred to another agency
> ➢ CFL – in CFL screening

9. Reporting Excess for USDA Screening Only. When reporting excess for USDA screening only (for transfers under Stevenson-Wydler Technology Act), or processing transfers under FAIR, follow the same prompts for Reporting Excess. **However, change the field "Drop After Internal Screening Period" from "No" to "YES".** This prevents the system from forwarding the report to GSAXcess. The property contact will receive an e-mail notification confirming that the report has cleared internal screening. After successful USDA screening, follow existing policies to process the transfer.

10. Reporting Exchange/Sale Property. Users should follow internal Area policy prior to reporting exchange/sale property, ensuring appropriate approvals and supporting documentation exists. ARS primarily uses exchange/sale for vehicles. To report exchange/sale property:

> • select AAMS-USDA link at the top of the page,
> • select "Create Report" link under Report Property, and
> • follow the field layout and key in the required information.

Under **"Property Type" select "Exceptions" and then select "Exchange/Sale**. The following fields are mandatory for exchange/sale property.

- Agency Location Code (Station Deposit Symbol)
- Appropriation or Fund To Be Reimbursed

These fields indicate the treasury deposit symbol and appropriation fund where sale proceeds are credited. For assistance in determining the appropriate codes, contact your Area Budget and Fiscal Officer.

Complete remaining fields as appropriate and finalize by selecting "Submit".

Note: Exchange/sale property will undergo **a 3-day screening cycle for both** USDA and GSA. Other USDA and Federal agencies may request exchange/sale property. **However, they are required to pay the fair market value for exchange/sale property.** The reporting office determines the fair market value (users may update amount in the fair market value field).

Note: As long as there is a freeze request on the exchange/sale report, the report will not transfer to GSA Sales. Contact the user (if it is a USDA agency) or call your Regional GSA office to ask that they contact the user (non-USDA) to remove the freeze.

11. CFL - Allocate/Transfer/Deny Excess. When a school places a request for excess under CFL, the contact listed under the Reporting Agency Activity receives an email indicating that a school has placed a freeze request for the property. As the property office, you are responsible for allocating, transferring, and denying requests in the CFL Module.

Under the CFL Menu, select "View the Request", and "Confirm the Allocation". Follow the screen prompts to allocate as appropriate to an eligible school. . (**As a reminder, CFL program supports pre-K through 12th grade; public, private, or parochial. It does not support Home-Schools.)**

Indicate the quantity allocated. After allocating, the system automatically generates an electronic SF-122 to the school. (To ensure the school receives the e-copy, we suggest calling the school to confirm. If needed, use the "re-send transfer document" to resend the SF-122 to the school.)

The school is responsible for signing the SF-122 and returning it to the ARS Reporting Agency Activity (property office). After receiving the approved SF-122, contact the school to determine the transfer arrangements, if the school did not list transfer arrangements.

Transferring Under CFL. After the school has made final arrangements to pick up excess, users must "transfer" the equipment to the school. This officially records the transfer under the CFL program. Because "Transferring" the report officially removes

the report from the system, do not "transfer" until you have made final arrangements with the school or after the school takes possession of the equipment. If the school changes its mind after you have transferred the report, then you will have to re-start the process.

Multiple Requests/Deny Requests. If there are conflicting requests for the property, users must "deny" remaining requests. The system will automatically send an e-mail notice letting the school know their request was denied. We suggest that you do not "deny" any other request until you are ready to "transfer" excess to the allocated school. If necessary, you can re-allocate property to another requestor.

When there are competing requests, allocation should come on a first come basis; realistic request/transfer request, or hardship needs.

As long as a "freeze" requests remains on the asset, the report will not pass to GSAXcess.

12. USDA Screening (AAMS) – Allocate/Transfer/Deny Excess. Property
officers are responsible for allocating excess requested during USDA screening. However, when excess reports pass to GSAXcess, GSA has sole responsibility for allocating requests.

During USDA Screening, other USDA agencies and their sponsoring institutions have the opportunity to acquire excess before it becomes available in CFL or GSAXcess. Examples of USDA sponsoring institutions are:

- 1862 Land Grant Institutions under the CSREES FEPP Program,
- Forest Service-FEPP Institutions,
- 1890 Historically Black Colleges and Institutions,
- 1994 Native-American Institutions, and
- Hispanic-Serving Institutions.

These institutions have the same eligibility as other USDA agencies. They have priority to acquire USDA excess before non-USDA organizations". All transfer requests must be approved by their sponsoring agency. ARS property officers must determine if the institution is eligible before approving requests.

For competing requests, allocation is on a first come first serve basis; or:

- emergency need, or
- avoiding a new procurement.

When another USDA user places a freeze request on excess property, they receive an e-mail notification forwarding the electronic form SF-122. It is important for you (the reporting office to monitor excess release dates to determine if there are pending "freeze" requests. Without checking the system, the reporting agency is only aware of a "freeze" upon receipt of a transfer document.

After receipt of the transfer document (signed SF-122), the reporting office will:

- review the transfer document for approval as appropriate,
- approve the form by providing the PMO's signature and title,
- fax the completed SF-122 to the requesting agency, and
- allocate the property in AAMS.

The reporting agency and the requesting agency will work together to process the transfer. The requesting agency is responsible for paying transportation costs.

The reporting agency should notify the requesting agency if the request is denied, such as competing requests, withdrawing excess for internal use, etc. Do not leave pending freeze requests unresolved. **As long as a "freeze' request remains in the system, the report will not pass to GSAXcess.**

Allocating in AAMS. After completing the transfer document, the reporting contact will allocate the transfer in AAMS:

- select AAMS-USDA link at the top of the page,
- select the link to "Review and Transfer Multi Items" or "Review and Transfer Single Item" as appropriate,
- identify the property by the item control number,
- enter the quantity transferred, and
- select "Transfer".

User will receive a confirming message that the transfer is completed.

Note: When allocating, users need to ensure they are aware of the eligibility status of USDA agencies and USDA sponsoring institutions and regulations covering allocation criteria and competing requests. Call your APMO or Headquarters for assistance.

13. Acquiring Excess Property in AAMS & GSAXcess

Placing a Freeze Request. When a user places a freeze request, the user receives a system generated SF-122 (for property in AAMS) or an e-mail notification confirming the freeze and asking the user to verify the shipping address (GSAXcess). If GSA allocated excess to you, within 24-48 hours, the system generates an electronic form SF-122.

The user is required to obtain their appropriate approving official's signature. The approving official should be someone who is authorized to approve, or has authority to approve, acquisitions of excess Government property for official Government business.

The approving official must complete the SF-122 with their signature and title, and fax number and return the completed form to the reporting agency's property contact (for USDA) or to the GSA Property Office (GSAXcess). Prompt completion and return of the transfer document is essential since final allocation/transfer is initially based on receiving the completed transfer document on a first come first serve basis. As the requesting agency, you are responsible for paying transportation costs.

To "Freeze" excess during USDA screening,
- select AAMS-USDA link at the top of the page,
- select "Search and Freeze" link, and
- enter your search criteria (FSC, item control number, activity address code, description, state, etc.).

The system will display excess records that meet the search criteria. To view details of a specific record, click on the item description. The system will display detailed information regarding the item. To "Freeze"

- select "freeze",
- select "freeze quantity" (users cannot request a freeze quantity greater than the number available),
- enter "approving official" data (name, e-mail, fax,),
- enter shipping address, and
- select "freeze" to finalize.

To "Freeze" excess in GSAXcess, **follow the same procedures above except access the "Search and Select Menu".**

14. Deleting a Freeze. It is extremely important to delete an inadvertent freeze or a freeze no longer wanted. AAMS will not forward an excess report to GSAXcess if there is a pending internal freeze. To delete a freeze:

- select AAMS-USDA link at the top of the page, and
- select "Delete Freezes"

The system will display records that have been "frozen" by the user (identified by the User-ID). Users will:

- identify the property by the item control number,
- select the "selection box" next to the item, and
- select "delete".

The system will display the number of "freezes" that have been deleted.

To change or delete a freeze in GSAXcess, access the Search and Select Menu, select change or delete freezes and follow the screen prompts (similar to above).

15. Want List. AAMS/GSAXcess will search the database for available excess. Users may submit an electronic "want list" by selecting search criteria, such as description, federal supply classification code, condition code, and state. The system will search the entire database and if there is a match to your search criteria, users will receive an email notification listing the Item Control Number of matching items. Users can view items to determine if they are acceptable. Users can follow guidance for placing a freeze request. To submit an electronic "Want List", access AAMS/GSAXcess

- click on the AAMS-USDA link at the top of the screen,
- click on "Want List" link under the Search and Select Menu, and
- follow the field layout to submit specific search criteria.

Users "want list" information will stay active for 180 days. Users may submit multiple requests and can modify existing data as appropriate.

16. Additional AAMS/CFL/GSAXcess Features. AAMS offers other features that are not listed in this short guide. Offices should explore the system to familiarize themselves with these features and determine how they may assist them.

Address questions using AAMS, CFL, or GSAXcess to your APMO or PSSB.