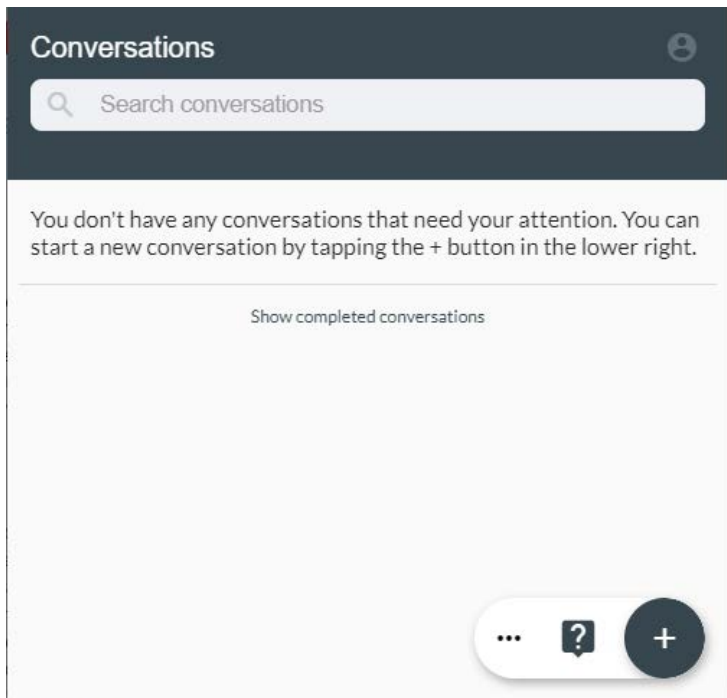


UNM INVENTORY ASSISTANT/AppTree



The UNM Inventory Assistant/AppTree can be accessed through a tile on the University's myUNM page. The AppTree-UNM Inventory Assistant tile will be the starting point for the Inventory Assistant.

The Inventory Assistant/AppTree is used by University departments to conduct the annual physical inventory of computers, drones and capitalized equipment as required by New Mexico State statute and by the Federal Government. The UNM Inventory Assistant/AppTree can also be used to Transfer an Asset, Dispose of an Asset, Check out an Asset and Find an Asset.

The Inventory Assistant/AppTree is designed in an app format and uses conversations to create transactions that are routed through workflows for approvals. Department Inventory Contacts (IC) will start a conversation. Upon completion by the Inventory Contact the transaction will route to the Department Dean, Director or Chair (DDC) for approval. The transaction will then route to additional offices including Property Accounting for review.

... The three dots in the lower right corner are used for selecting the Inventory Assistant/AppTree for production.

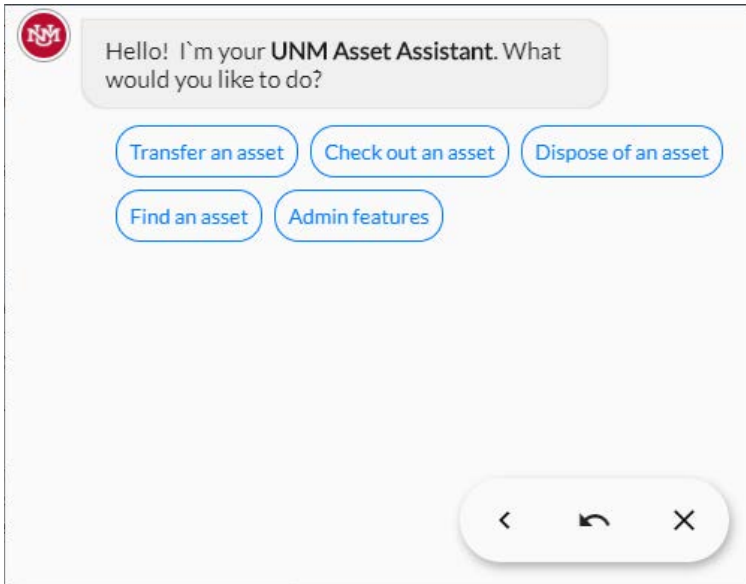


The question mark is used to access the Help Assistant to setup a mobile device such as a smart phone or tablet.



The plus sign is used to start a new conversation.

UNM INVENTORY ASSISTANT/AppTree



Inventory Contacts can select from the following options: **Transfer an asset** (internal or external), **Check out an asset** (required to take equipment offsite from UNM location), **Dispose of an asset** (Surplus Property disposal or Request for Deletion – RDA) or **Find an asset** (research an asset and update some attributes related to the asset).

Select [Dispose of an asset](#)

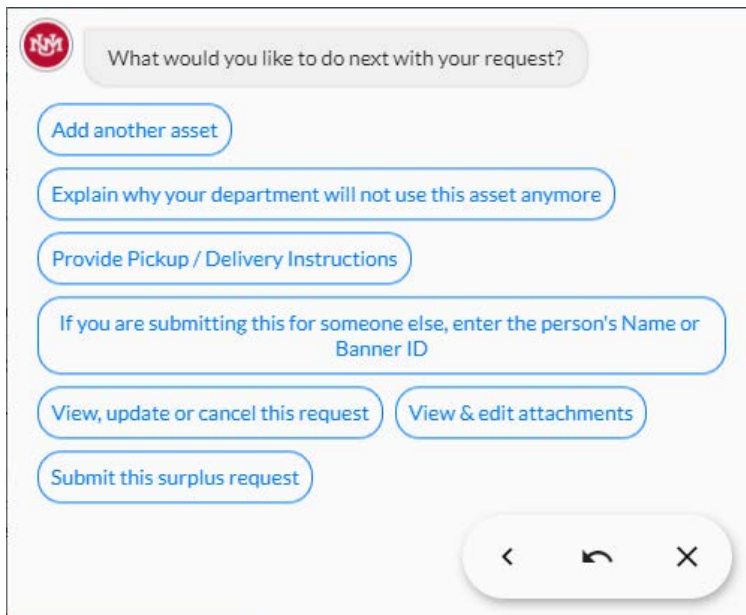
Select [Surplus: The asset can be repurposed, reused or recycled](#)

Select [Add an asset](#). If using a smart phone or tablet you can scan the asset tag or select [Enter barcode ID](#). Type the barcode (for example N00065856) and select Done.

Select from the list of four surplus codes the reason for the deletion.

Attributes of the asset will be displayed. Verify the information is correct for the asset you are sending to Surplus Property.

UNM INVENTORY ASSISTANT/AppTree

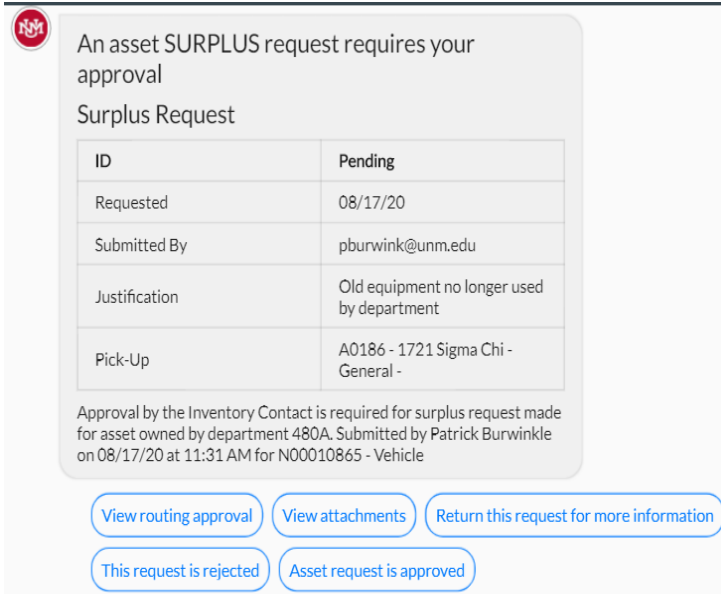


Note: Multiple assets can be added to the Surplus Property transaction. Submit separate requests for tagged versus non-tagged assets such as keyboards.

Select [Explain why your department will not use this asset anymore](#). Provide a business purpose for the surplus disposal. Press enter or select the blue icon.

Select [Provide Pickup/Delivery Instructions](#). Press enter.

UNM INVENTORY ASSISTANT/AppTree



An asset SURPLUS request requires your approval

Surplus Request

ID	Pending
Requested	08/17/20
Submitted By	pburwink@unm.edu
Justification	Old equipment no longer used by department
Pick-Up	A0186 - 1721 Sigma Chi - General -

Approval by the Inventory Contact is required for surplus request made for asset owned by department 480A. Submitted by Patrick Burwinkle on 08/17/20 at 11:31 AM for N00010865 - Vehicle

[View routing approval](#) [View attachments](#) [Return this request for more information](#)

[This request is rejected](#) [Asset request is approved](#)

Note: for capitalized assets with an adjusted cost greater than \$10,000 or net book value (NBV) is greater than zero, at the time of the surplus request, a justification memo will need to be attached. The final page of this document is a sample of a justification memo.

Select [Submit this surplus request](#)

The Inventory Assistant/AppTree will route this transaction to Surplus Property for review. DDC approval may be required if adjusted cost is greater than

\$10,000 or NBV is greater than zero. These assets also require Board of Regents approval.

Note that either Surplus Property or the DDC can return the transaction for additional information, reject the transaction or approve the transaction.

UNM INVENTORY ASSISTANT/AppTree

An email notification will be sent from the Inventory Assistant/AppTree notifying the Inventory Contact, the DDC and the core offices that a transaction requires their review.

support=apptreesoftware.com@notification.apptreesoftware.com
on behalf of support@apptreesoftware.com

An asset SURPLUS request requires your approval

Approval by the Inventory Contact is required for surplus request made for asset owned by department 480A. Submitted by Patrick Burwinkle on 08/17/20 at 11:43 AM for N00065856 - Laptop/Latitude7490 [Click here to view](#)

University Services
Marcos Roybal
Associate Director

Business Operations
1128 University Blvd NE
505.277.2366

CRLS
Clark Hall
505.277.5109

Copy Center
Dane Smith Hall
505.277.8267

Mailing Systems
1128 University Blvd NE
505.277.4124

Records Management
1128 University Blvd NE
505.277.1136

Shipping & Receiving
915 Camino de Salud
505.272.6302

Surplus Property
1128 University Blvd NE
505.277.2923

Disposition of Surplus Property – UNM Tag #214638

August 29, 2018

To: Marcos Roybal
From: UNM Mailing Systems
Subject: Vehicle Disposition

Dear Mr. Roybal:

UNM Tag #214368 (Dodge Van B1500) was purchased on February 15, 1996 by UNM Mailing Systems for \$14,690. The vehicle was used for mail and parcel delivery throughout the UNM Campus and has a net book value (NBV) of \$0. The vehicle has had extremely high maintenance costs throughout the past five years and is no longer used due to improved route efficiency.

We believe our decision to send this vehicle to UNM Surplus Property surplus will result in monthly cost savings, which include insurance expenses, fuel expenses, and the aforementioned repair and maintenance expenses. Thank you for your consideration.

Sincerely,

X

Norris Cain
Supervisor-Incoming/Outgoing Mail