



Sunflower Systems Training

Department of Commerce

December 2009

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Chapter 1: Introduction

Sunflower Assets 4.5

Course Objectives

- After this course you should be able to:
 - Explain Sunflower System's functionality
 - Create assets using the Maintain Inventory Assets form
 - View property record history and information
 - Update property record information
 - Place assets on pass
 - Transfer property
 - Create and conduct an inventory campaign
 - Create and withdraw excess requests
 - Retire assets with appropriate final events
 - Define Administrator duties

Lesson Objectives

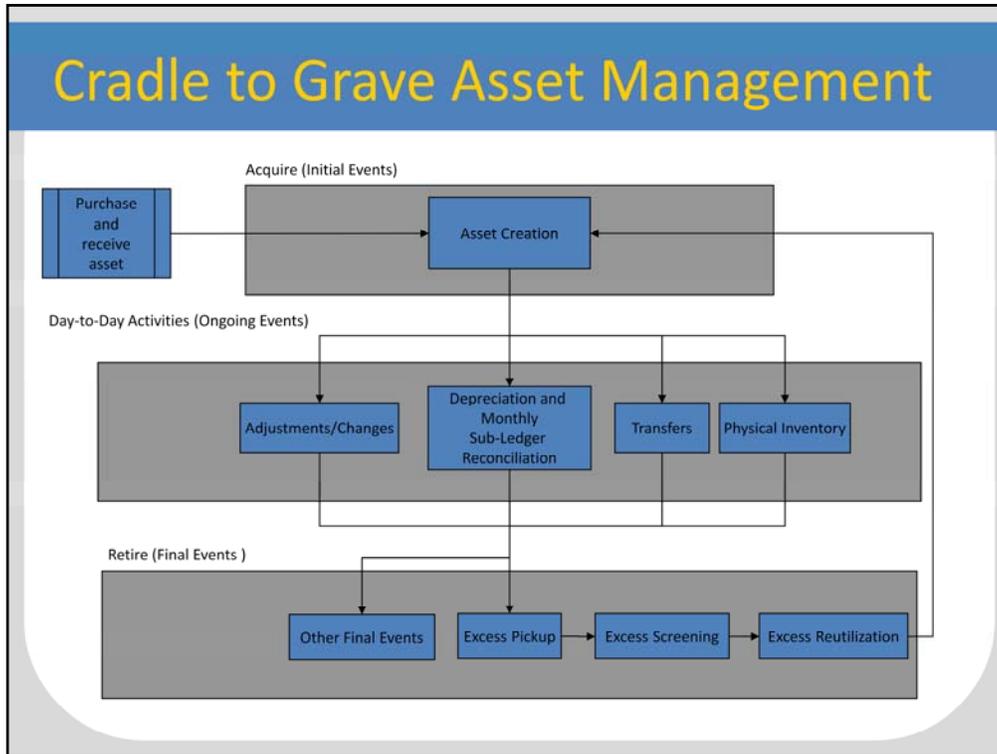
- After this lesson you should be able to:
 - Describe the use of Sunflower Systems at DOC.
 - Explain the DOC property roles as they relate to Sunflower Systems.
 - Explain how the Student Guide is organized.
 - Explain the common elements of each Lesson.
 - Describe the purpose and function of Navigations.
 - Describe Labs.
 - Login to Sunflower Systems

DOC and Sunflower Systems

- Tracks all property assets
- Currently used by multiple Bureaus at DOC, including NOAA, OS, ITA and NTIS

Sunflower Systems enables asset management utilizing a cradle-to-grave process. Users are able to account for and manage their assets from the time of acquisition through disposal. A complete history is maintained as records are easily updated to reflect any changes (location, user, value, etc.). Users may also generate reports to view assets. Once assets are disposed and a final event is created, a history of the assets remain in the system for reporting purposes in the future.

Currently, several Bureaus at the Department of Commerce (DOC) are using Sunflower Systems.



The Sunflower Property system uses **Event Types** to describe the methods by which accountable property is acquired, disposed of, and maintained throughout their life. Event Types are categorized as either initial, ongoing, or final events. Once created, the event type (e.g. initial and final event types) displays on screens such as the Asset Summary and History screen for their respective fields. The Event Types are associated with journal entries, so it is important that the correct Event Type be chosen each time.

Initial Events – e.g. *Purchase*

Ongoing Events – Ongoing events enable you to keep a historical record of reoccurring events that can be associated with assets. For example, if the User or location of the asset changes, you can track these changes. Or, if the asset is transferred from one custodial area to another these records will be kept as well.

Final Events – e.g. Loss or Destroyed, Excess

Note: Once an asset is retired, the property record remains in Sunflower and shows the appropriate final event. Any retired asset can be reinstated at a later date, if appropriate.

Course Role and Responsibilities

DOC Role:	Property Management Officer (PMO) Property Accountability Officer (PAO) Property Custodian (PC)
Sunflower System Responsibility:	Inventory Clerk Agreement Clerk Administrator Review Manager Review Clerk



The **Property Management Officer (PMO)**, **Property Accountability Officer (PAO)**, and **Property Custodian (PC)** are the Department of Commerce roles responsible for maintaining the DOC's property records.

To perform these business functions, PMOs, PAOs and PCs use the **Sunflower System Responsibility** called **Inventory Clerk**, **Agreement Clerk**, **Administrator**, **Review Manager** and **Review Clerk** and the computer system called **Sunflower Assets**, or **Sunflower** for short.

This course is designed to teach you the software and business processes to perform the role of PMO, PAO and PC.

Student Guide Organization



Each chapter or lesson in the Student Guide follows a consistent pattern. It contains the common elements below, which we will look at in this chapter.

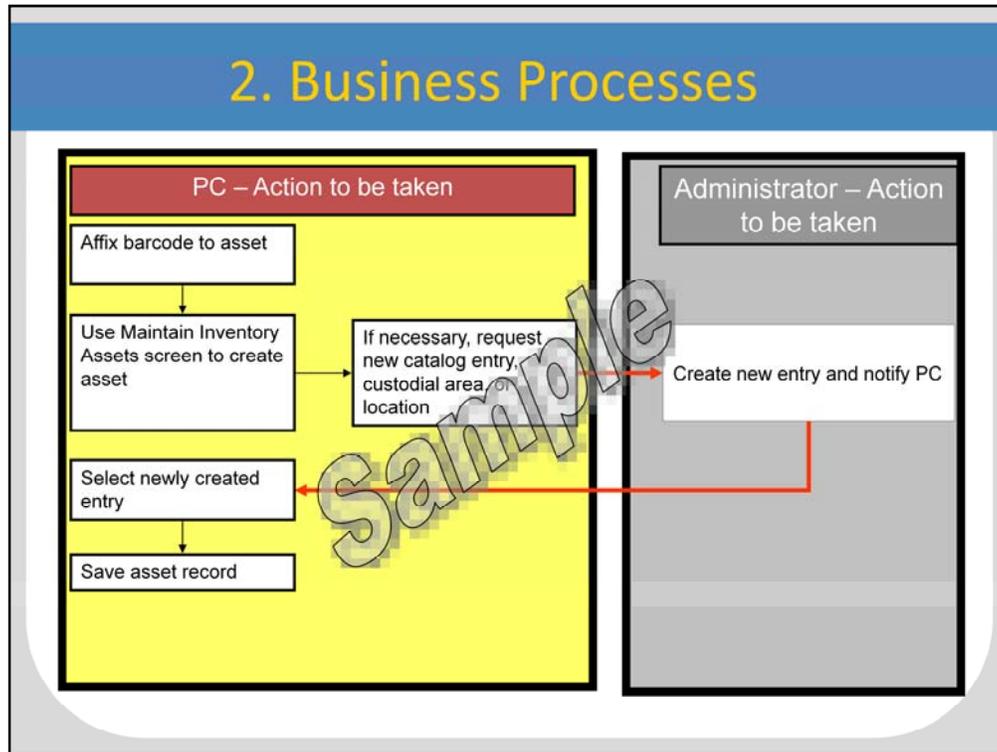
1. Lesson Objectives
2. Business Processes
3. Sunflower Content
4. Navigations
5. Labs
6. Lesson Summary

1. Lesson Objectives

- After this lesson you should be able to:
 - Explain the Sunflower System's forms (windows)
 - Define key terms
 - Use the toolbar and shortcut keys
 - Describe Sunflower's Location relationships
 - Explain user defined and complex fields
 - Describe the Sunflower's System's Catalog
 - Explain how to manage errors
 - Explain how to conduct wildcard searches
 - Insert comments, pictures and attachments

Each lesson begins with a set of **Lesson Objectives**. These bulleted items list the basic tasks to be accomplished in the chapter.

2. Business Processes



Here we see a flowchart describing a high level business process. Before actually looking into the Sunflower applications screens, we prefer to try to get the “big picture” from a business perspective.

3. Sunflower Content

Maintain Review Campaigns - asrv2010

Review Campaigns

1 Name ... Frozen?

Sponsor

Campaign Type

2 Sample Type

Base Source

Audit of

Culminated by

3 Begin Date Expected End Date Actual End Date

User Fields*

Comment Freeze Status Resolutions

Often we include screenshots of Sunflower with particular regions of the screen circled for further discussion.

Note: Some Sunflower content will not be covered in the class, but is included for *reference purposes only*. A good example is a Sunflower function that is only used by a very small handful of users at the DOC. In this case, information is included on this topic which can be referred to at a future date.

4. Navigations



The symbol above indicates that you are “entering” a Navigation. What is a Navigation?

Navigations are step-by-step instructions on how to perform a specific task in Sunflower. They appear throughout the student guide, and are always preceded by the compass symbol. They are called “Navs” for short.

Let’s take a look at a sample Nav...

Sample Navigation ("Nav")

The screenshot shows a web-based 'Asset Creation' form. It includes a breadcrumb trail 'M > Mgmt > Maintain Inventory Assets' and a title 'Maintain Inventory Assets'. The form contains various input fields for asset details. Four numbered callouts (1-4) are placed to the left of the form, with red arrows pointing to specific elements: 1 points to the breadcrumb trail, 2 points to the form title, 3 points to a numbered instruction, and 4 points to a table of field descriptions.

1. Enter the mandatory property information in the fields below, and **Tab** through the screen as you go.

Field	Description
Barcode #	Enter the new Barcode Number for the asset.
Manufacturer	Enter the name of the manufacturer of the asset. If a list of

Below are some comment elements of a Nav:

*Note: Navs may be preceded by a section called **Purpose** or a **Before You begin**.*

1. May contain a Navigation Box. More instruction on this to follow.
2. Will contain a picture of the starting screen.
3. Contain step-by-step numbered instruction.
4. May contain Nav tables of fields available for data entry.

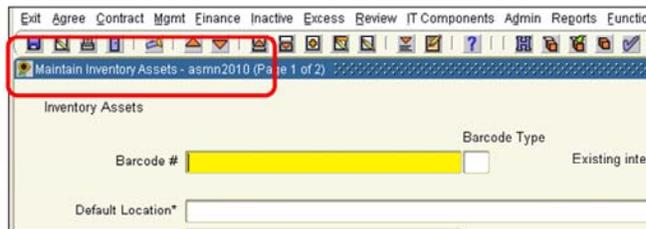
Nav Boxes

Nav Boxes identify the information related to beginning a specific task. We will now examine the Nav box from the preceding page.

Inventory Clerk → Sunflower Responsibility

M > Mgmt > Maintain Inventory Assets → Navigation Path

Maintain Inventory Assets → Screen Name



Nav Boxes are ordered as follows:

1. **Sunflower Responsibility**

- The responsibility gives you access to a specific set of Sunflower windows, menus, reports and data.

2. **Navigation Path**

- The directions on how to get to the appropriate starting window.
- The letter **M** stands for Menu item and **B** for Button. In these cases the first step will be to select a menu item or button, respectively.

3. **Screen Name**

- Identifies the title of the screen as displayed in the header bar (see circled area).

Bold Letters in Navs

If you want to search by barcode number, goto task #1. Otherwise, goto task #4.

1. Enter the barcode number in the **Barcode #** field.
2. **Tab** out of the field.

Bold letters in Navs can mean one of two things:

1. You have been given a choice. These statements are all or partly in bold, and they usually require you to make a decision.
2. Single words in bold type indicate an actual field, window or button name that is visible on the screen.

Nav Tables

Field	Description
Barcode #	Enter the new Barcode Number for the asset.
Manufacturer	Enter the name of the manufacturer of the asset. If a list of values appears, select the applicable standard manufacturer name from the list.
Model Number	Enter the model number for the asset. If a list of values appears on the screen, select the applicable standard model number from the screen. Otherwise, the Catalog Number and Official Name fields will automatically populate (based on the Manufacturer and Model Number combination.)
Serial Number	Enter the serial number of the asset, if known. Otherwise leave it blank .

Nav Tables contain a block of fields available for data entry. A few comments:

- The **non-shaded** fields (with white background) indicate that an entry is required.
- The **shaded** fields (with gray background) indicate the entry is optional or a default value.
- If a screen field is not referenced in a table, it is not needed.

5. Labs



- Labs are required activities designed to reinforce lesson objectives with hands-on practice.
- You will need the corresponding Navigation to complete a particular Lab.

6. Lesson Summary

- You should now be able to:
 - Explain the Sunflower System's forms (windows)
 - Define key terms
 - Use the toolbar and shortcut keys
 - Describe Sunflower's Location relationships
 - Explain user defined and complex fields
 - Describe the Sunflowers System's Catalog
 - Explain how to manage errors
 - Explain how to conduct wildcard searches
 - Insert comments, pictures and attachments

Each lesson concludes with a **Lesson Summary** which recaps the learning objectives for that chapter.

Login to Sunflower

- On line application
- Enter through DOC website:
<http://www.osec.doc.gov/oas/ppmd/>
- Click the Sunflower Log-in link
- Use your login credentials
 - User Name
 - Password
- Select from the menu options



Sunflower Systems is a web-based application and may be accessed with your assigned user name and password. Your user name will be assigned to you. Please check with your instructor for your user ID and password.

Use the DOC website <http://www.osec.doc.gov/oas/ppmd/> to access Sunflower.

There are certain system requirements for using Sunflower. Please work with your IT Support to verify that the following is installed on your computer:

- Java
- Internet Explorer web browser
- Jinitiator
- Allow pop-ups

Sunflower Systems Log In

SunflowerEnterprise Sunflower Enterprise - Production 4.5.0.0

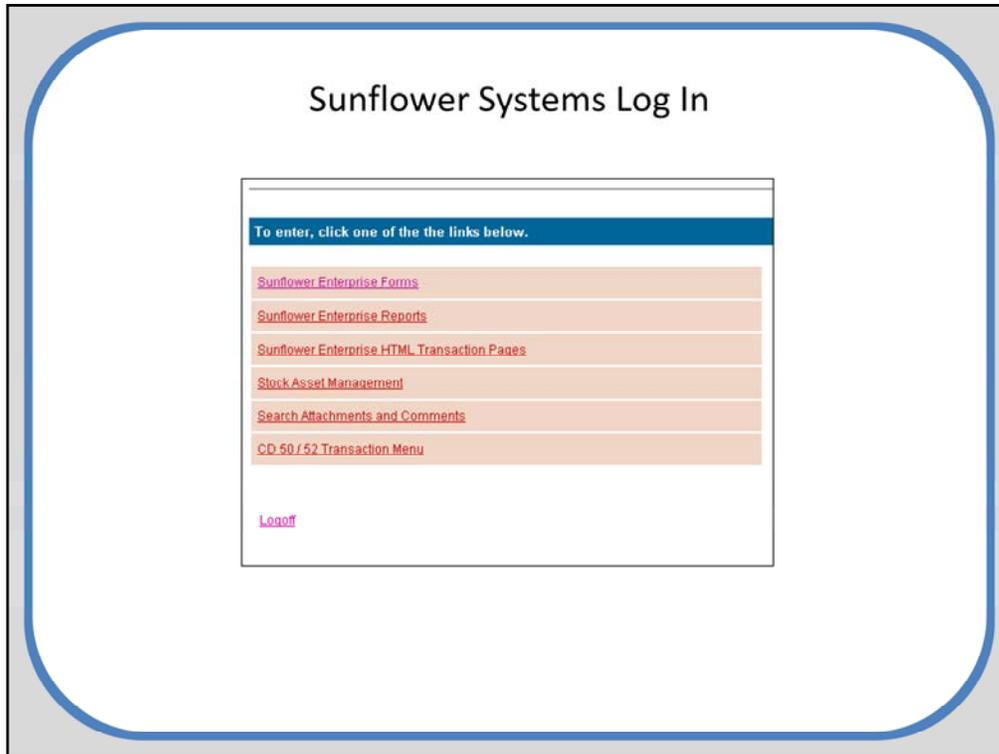
To log into Sunflower Enterprise, enter your username and password below and press the "login" button.



Username

Password

Provide your username and password for access to the system. Then select the login button.



You will then need to select one of the links to launch Sunflower Systems.

Sunflower Enterprise Forms opens the windows used for data entry.

Sunflower Enterprise Reports opens a screen to run Adobe Acrobat reports.

CD 50 / 52 Transaction Menu is used to request and approve/deny retirement of assets.

Note: This screen is also used to **Logoff** the application.

Lesson Summary

- You should now be able to:
 - Describe the use of Sunflower Systems at DOC.
 - Explain the DOC property roles as they relate to Sunflower Systems.
 - Explain how the Student Guide is organized.
 - Explain the common elements of each Lesson.
 - Describe the purpose and function of Navigations.
 - Describe Labs.
 - Log in to Sunflower Systems.

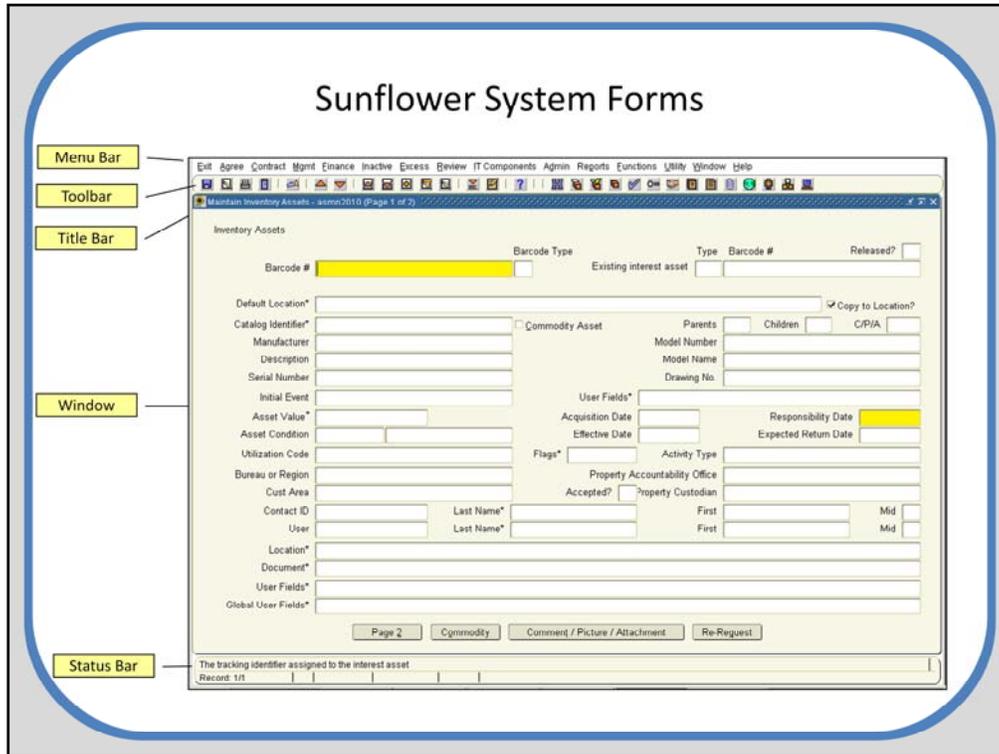


Chapter 2: Sunflower Systems Basics

Sunflower Assets 4.5

Lesson Objectives

- After this lesson you should be able to:
 - Explain the Sunflower System's forms (windows)
 - Define key terms
 - Use the toolbar and shortcut keys
 - Describe Sunflower's Location relationships
 - Explain user defined and complex fields
 - Describe the Sunflowers System's Catalog
 - Explain how to manage errors
 - Explain how to conduct wildcard searches
 - Insert comments, pictures and attachments

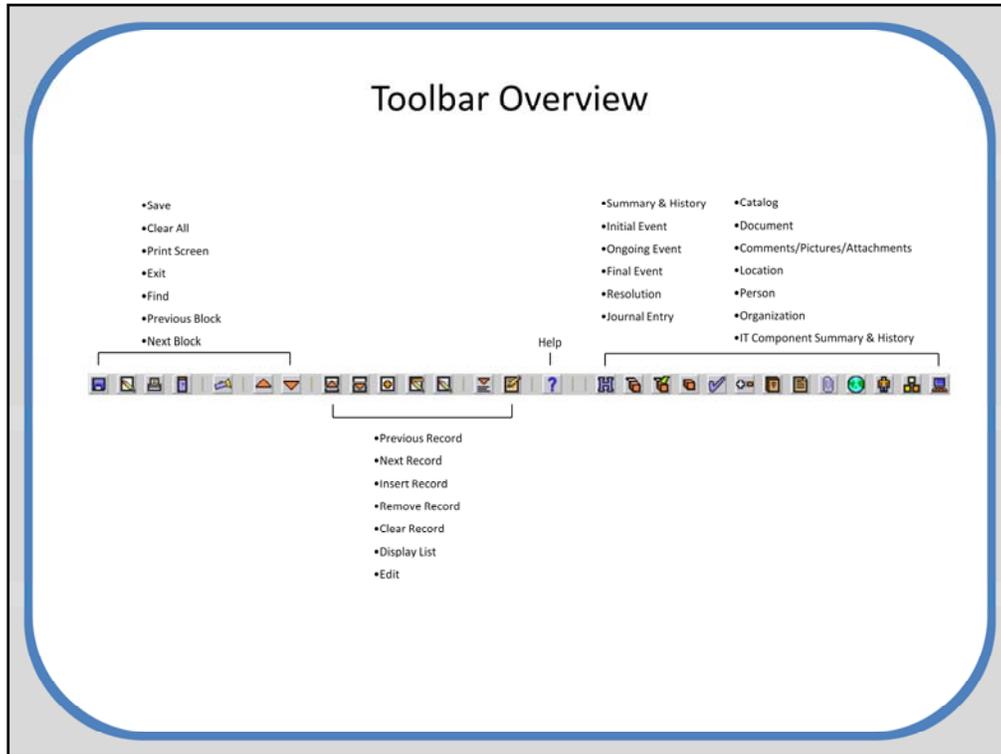


Sunflower Assets, is designed to operate in a Web-enabled environment. It is important to understand the terminology of the components within the Sunflower Assets application forms. The window (screen, page, panel, etc.) is commonly referred to as a form. Other common terms are listed on the following page.

Note: It is recommended that you 'maximize' the window to enhance the viewing of each screen. This will allow you to see all the information on the Status Bar at the bottom of the screen.

Key Terms and Definitions

TERM	DEFINITION
Asset	An accountable property item that has been barcoded and entered into Sunflower.
Item	A line item record (e.g. a piece of property that has not been barcoded or entered into the system); or a non-accountable piece of property.
Button	A graphic element or icon that initiates a predefined action when you click it.
Field	An area in a window that displays data or allows you to enter data.
Menu Bar	A pull-down list of menus used to navigate to other forms or perform actions within a form.
Status Bar	Displays any status information and other information related to form processing. Also works in conjunction with the "Tool Tips" to provide button (or icon) information.
Title Bar	Indicates the name of the window, context information pertinent to the information in that window, and provides page information (i.e. Page 1 of 2).
Toolbar	Buttons (or icons) used to navigate to other forms or perform actions within a form.
Tool Tips	Help information created by moving your mouse over the top of an icon or button. Used to determine the function of an icon or button on the toolbar or form.
Window	A form. An area where you, the user, interact with the application. Many windows can be open at one time and you can access these "overlapping" windows to perform data entry or data search activities.



The tool bar is a collection of buttons (or icons) that perform specific actions when you select them. Each tool bar button replicates a menu bar action. Depending on the context of the current field or window, a tool bar button may be active or inactive. Display help, or a tool tip for an active tool bar button, by placing your mouse over the button.

Refer to the following page for a quick reference list of toolbar icons and shortcut (hot) keys.

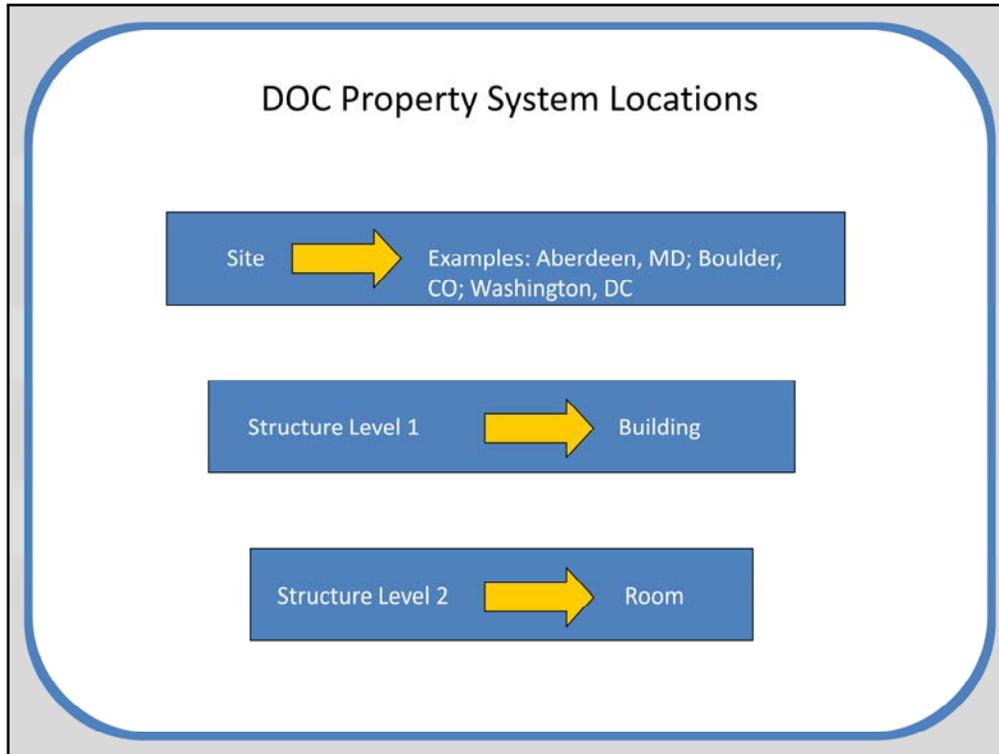
Toolbar Buttons and Shortcuts

Save		Remove Record		Journal Entry	
Clear All		Clear Record		Catalog	
Print		Display List		Document	
Exit		Edit		Comment/Picture/Attachment	
Find		Help		Location	
Previous Block		Summary & History		Person	
Next Block		Initial Event		Organization	
Previous Record		Ongoing Event		IT Component Summary and History	
Next Record		Final Event			
Insert Record		Resolution			

FUNCTION	KEY	FUNCTION	KEY	FUNCTION	KEY
Clear Block	F7	Enter Query	F11	Next Set of Records	Shift+F8
Clear Field	F5	Execute Query	Ctrl+F11	Previous Block	Shift+PageUp
Clear Form	F8	Exit	F4	Previous Field	Shift+Tab
Clear Record	F6	Help	Ctrl+H	Previous Record	Up
Commit/Save	F10 or Ctrl+S	Insert Record	Ctrl+Down	Print	Ctrl+P
Count Query	F12	List of Values	Ctrl+L	Page Down	Scroll Down
Delete Record	Ctrl+Up	List Tab Pages	F2	Page Up	Scroll Up
Display Errors	Shift+Ctrl+E	Next Block	Shift+PageDown	Return	Return
Duplicate Field	Shift+F5	Next Field	Tab	Show Keys	Ctrl+K
Duplicate Record	Shift+F6	Next Primary Key	Shift+F7	Update Record	Ctrl+U
Edit	Ctrl+E	Next Record	Down		

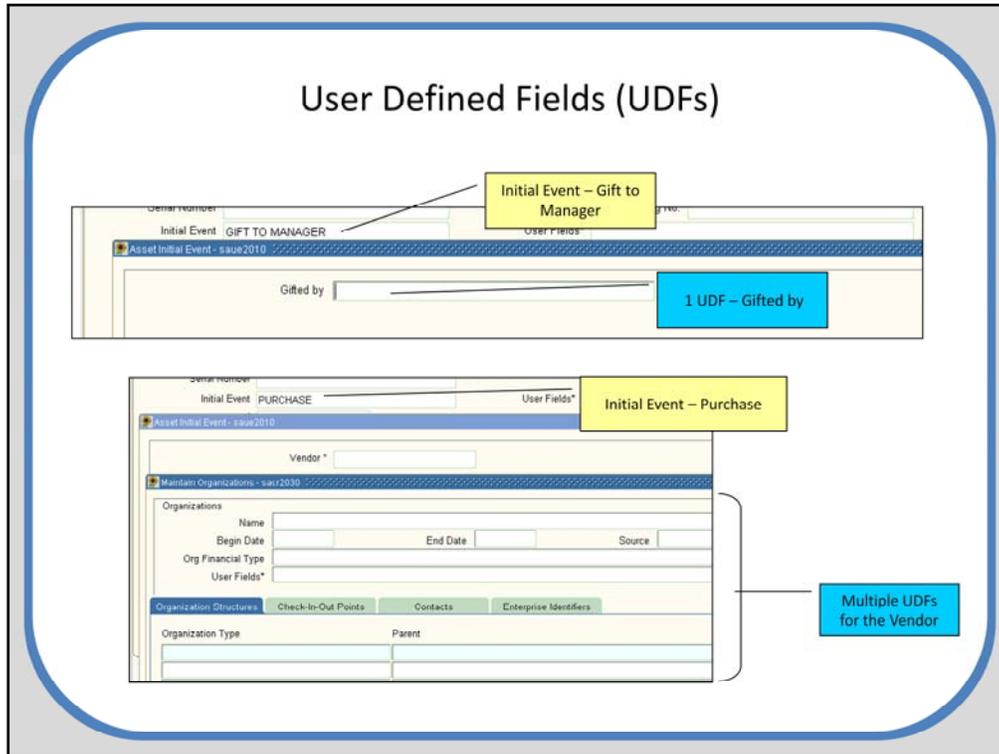
Note: Copy (Ctrl+C) and Paste (Ctrl+V) may also be available.

See Appendix for Job Aid.



A Location is mandatory when creating a property record. Sunflower uses Sites and Structure Levels to define the location of an asset. For the DOC, Sites are geographic locations (e.g. **Aberdeen, MD; Boulder, CO; Washington, DC**). Structure Level 1 is **Buildings** (e.g. **Ronald Reagan**). Structure Level 2 is **Room**. Your Building selection will be based upon the Site chosen; your Room selection will be based upon the Building chosen. **Sites, Buildings,** are **mandatory** fields and are selected from a List of Values. The **Room** may be selected from the List of Values or may be typed in if it is not in the list; this entry is then saved to the database and appears for all users in the List of Values. Keep in mind that the more specific the location, the easier that asset will be to find during the annual physical inventory process.

For updates to the location lists of values, all DOC staff should contact the help desk or a system administrator.



User Defined Fields (UDFs) are place holders used to define information that is unique to the DOC. Information entered in UDFs will generally be entered manually, but in some cases the system will generate entries automatically. Where appropriate, UDFs may have fields that contain a list of values for you to select your entry. In the above illustrations notice how the UDFs display changes based upon different selection criteria used when you create an initial event for creation of an asset. This UDF is tied directly to the Initial Event field data entry.

Note: Not all UDFs contain information, meaning that these UDFs are not being utilized by the DOC and are therefore not mandatory. If a user attempts to launch these 'unextended' UDFs, an error message similar to the following will be displayed: "Context does not extend the field." This is okay – it just means that there is no information within, so the user can continue entering information on other parts of the record.

Complex Fields

Asset Value*

Asset Value Components

Value Type	Asset Value User Fields*	Cap?
ACQUISITION COST	\$2,500.00	No

Locations*

Locations

Site

BUILDING ROOM Mail Stop

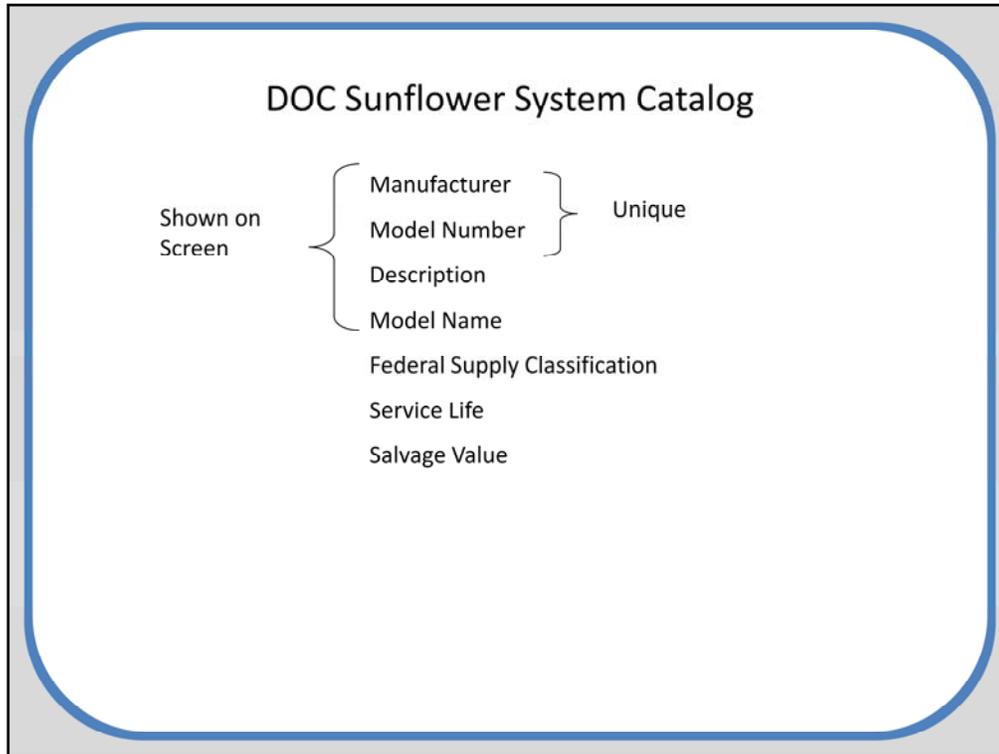
Structure Level 3 Name

GPS 1 GPS 2 GPS 3

A Complex Field is a grouping of related fields that are displayed in the form of a pop-up window due to their tight association with one another. Common complex fields are Location, Asset Value, Names, Catalog, and User Defined Fields. For example, Location is a combination of several fields that include Site, Building, Room etc. All complex fields are represented by their name followed by an asterisk (*).

Note: Selecting the **Save** button automatically saves and closes complex fields.

Remember: COMPLEX FIELDS = FIELD NAME + *



The property catalog stores data common to a property item's **Manufacturer** and **Model** number. The catalog is based on the manufacturer's lists, and is updated frequently to reflect new products. Having a more detailed centralized catalog enables you to have a uniform way to enter **Manufacturer** and **Model** information quickly and precisely, especially when entering multiple assets. This standardization is important when running reports or queries to ensure results are satisfactory.

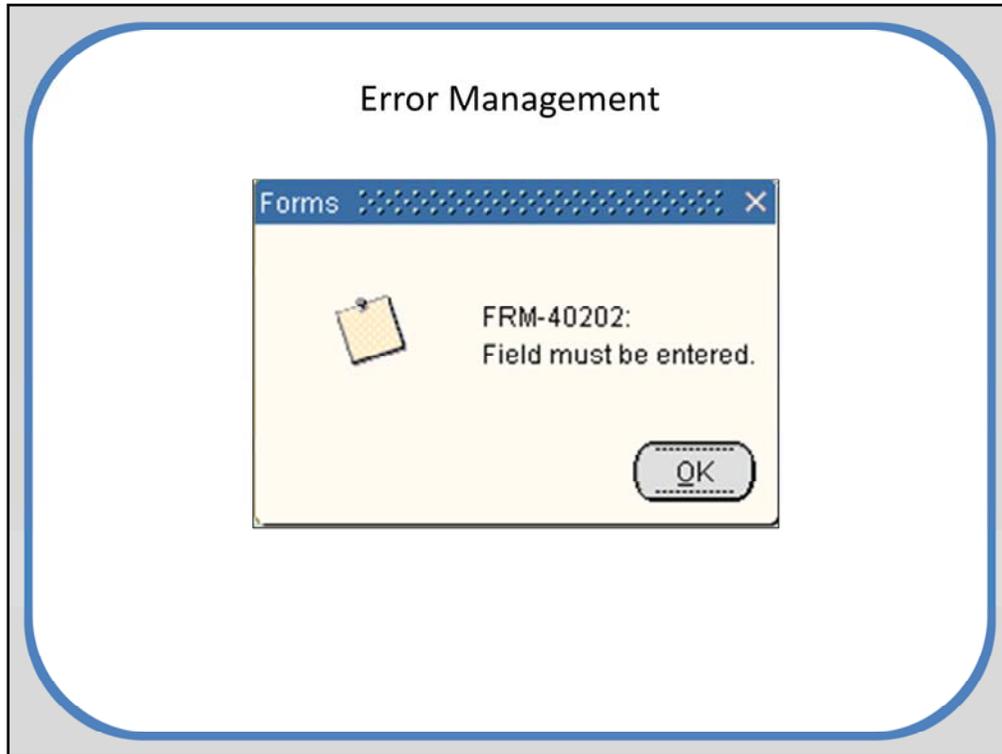
The **Administrator** is the only person able to add a manufacturer and model number to the catalog. Notify the Administrator to request a new entry.

Since the catalog will be centrally controlled by the Administrator, the likelihood of having the following entries will be greatly reduced:

Manufacturer - Palm Computing Inc.
Manufacturer - Palm Computing Inc.
Manufacturer - Palm Computing Inc.

Model - PALMV
Model - PALM V
Model - PALM 5

The **Official Name**, which is unique to the Manufacturer and Model number, will be populated by the Cataloger as well.



When filling out a form to complete or change a property record, you must complete all the required fields. In the event of a skipped field or an error, the Sunflower System will notify you by displaying an error message. This error message will generally appear when you attempt to save the record. But how do you get back to the field? Sometimes it is not as easy as placing your cursor where you want or need it to be. In these cases, use any of the following short-cut key strokes to back out of a required field.

- Select the **SHIFT + TAB** keys on your keyboard.
- Select the **CLEAR RECORD** button to begin again.

Error Management (continued)

The screenshot shows a software window titled "Create Inventory Asset Final Events - asmn2080". The window is divided into two main sections: "Final Events" and "Assets".

Final Events Section:

- Date: 09/17/2007
- Final Event: DELETE - LOST OR STOLEN
- User Fields*: LAPTOP IS LOST DO NOT HAVE LAST USER ON RECORD TO VERIFY CIRCUMSTANCES_750
- Document*: (empty)
- Comment: (empty)

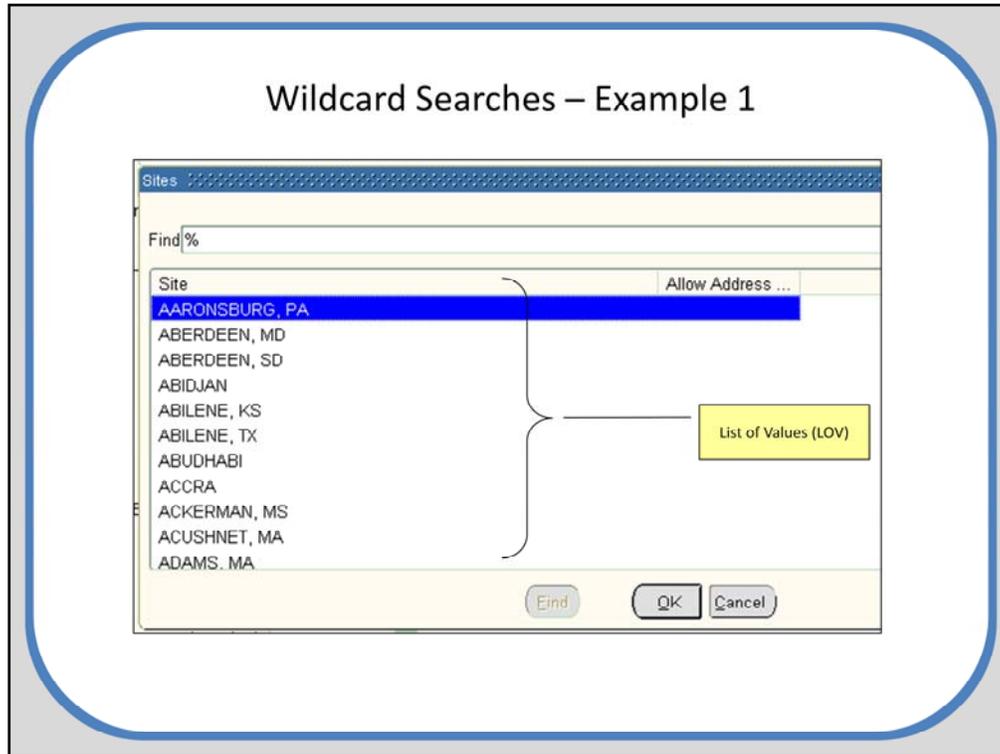
Assets Section:

Ok	Barcode #	Manufacturer / Model / Official Name*
<input checked="" type="checkbox"/>	00000035741	DELL INC. _LAPTOP_ LAPTOP COMPUTER
<input type="checkbox"/>		

Message: SA-01083: You are not a cust area contact for 540J0N110

Sometimes you may not see a 'pop-up' error message as shown on the previous page. Depending on which screen you are working in, the **Message** field at the bottom of the screen could show an error instead. In the above example, the message states "You are not a cust area contact for 540J0N110" which means that the user does not have privileges to save the requested changes.

Wildcard Searches – Example 1

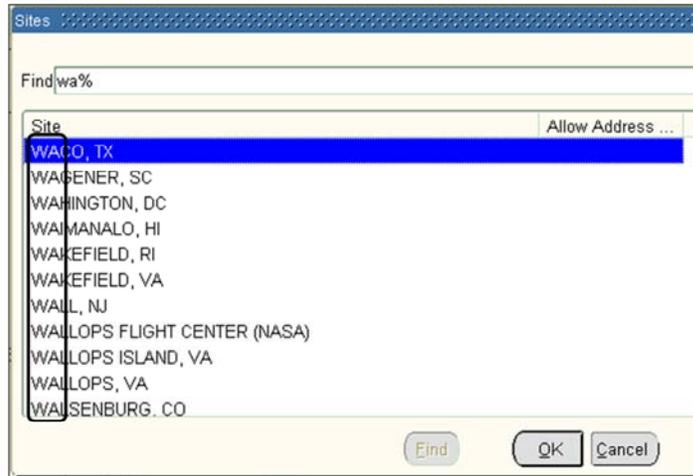


Using the LOV feature in combination with wildcards can save you time and maximize correct data entry without having to memorize or look up valid data for each field. Simply choose data from an online list of values whenever you want. Additionally, you are relying on the Sunflower System to validate your input since you will know right away if your entry does not match an option from the LOV. The combination of the % with a character will display sets of results.

- % - returns the complete list of values (shown above)
- character + % - returns all values that begin with the character(s)
- % + character - returns all values that contain the characters anywhere within the value.

The best way to explain this concept is by example. The following walkthrough will illustrate the wildcard concept. The walkthrough will show a search for sites beginning with and containing **WA**, using the second and third methods described above.

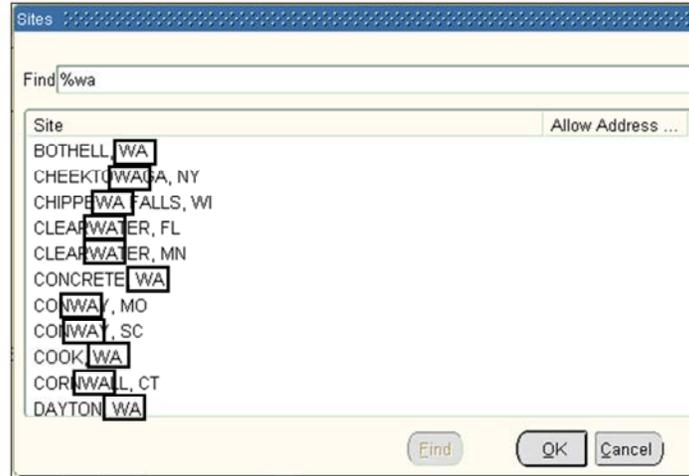
Wildcard Searches – Example 2



Example – character(s) + % - return all values that begin with the character(s).

In the above example, a search is performed using the letters **WA**, the wildcard (**%**), and the **Find** button. As you can see, the list of values is limited to only those Sites that begin with **WA**.

Wildcard Searches – Example 3



Example - % + character - return all values that contain the characters anywhere within the value.

In the above example, a search is performed using the wildcard (**%**), the letters **WA**, and the **Find** button. As you can see, the list of values is limited to only those Sites that have the letters **WA** in their names.

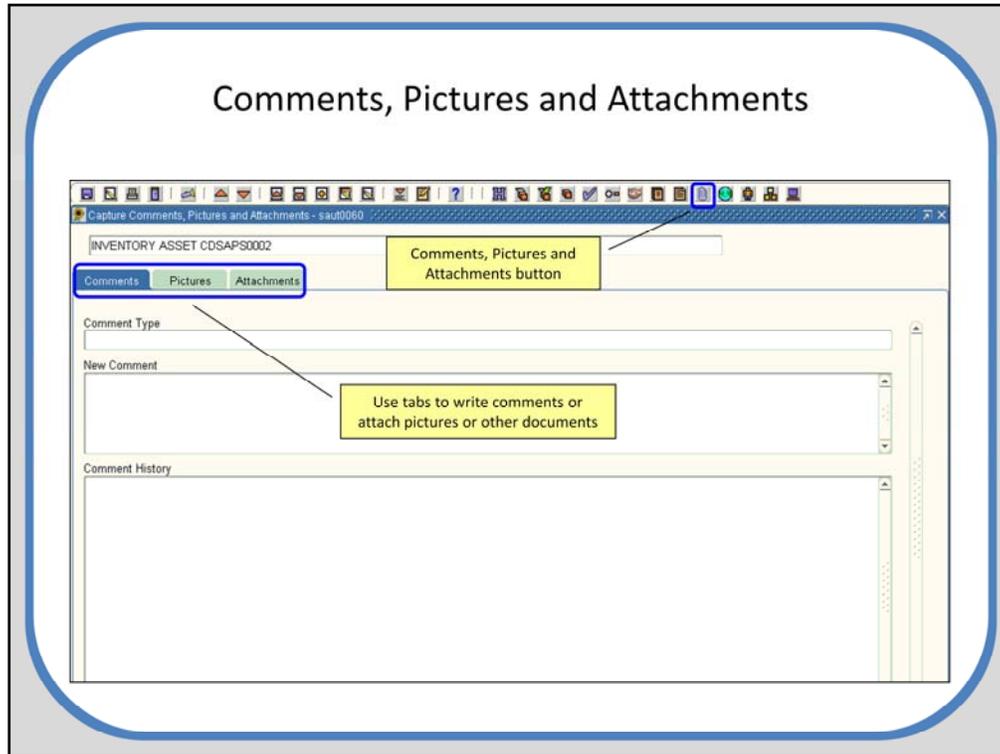
Wildcards and Running Queries

The screenshot shows a software window titled "Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSUR1@hospisd3)". The window contains a "Query Criteria" dialog box with the following fields and options:

- Radio buttons for "Assigned To" and "Requested" (selected).
- Text fields for "Cust Area", "Contact ID", "User", "Last Name*" (two instances), "First", and "Mid" (two instances).
- Text fields for "Agreement Identifier", "Site", "Structure Level 1", "Manufacturer", "Description", "Interest Type" (set to "INVENTORY ASSET"), and "Unique Identifier".
- Text fields for "Type", "Structure Level 2", "Model Number", "Serial Number", and "Barcode #".
- Text fields for "Initial Event", "User Fields*" (two instances), and "Global User Fields*".
- Radio buttons for "Interest Type": Agreement, Excess, Financial, Inactive, Inventory (selected), and Subsat.
- Buttons at the bottom: "Last Criteria", "Execute", and "Cancel".

Wildcards are also useful when running queries. If you do not know the complete value of a field, but know what it begins with you may enter the beginning characters followed by the %. For example, in the Cust Area field a PC could enter 55% and Execute the query to return results within Custodial Areas beginning with "55."

Comments, Pictures and Attachments



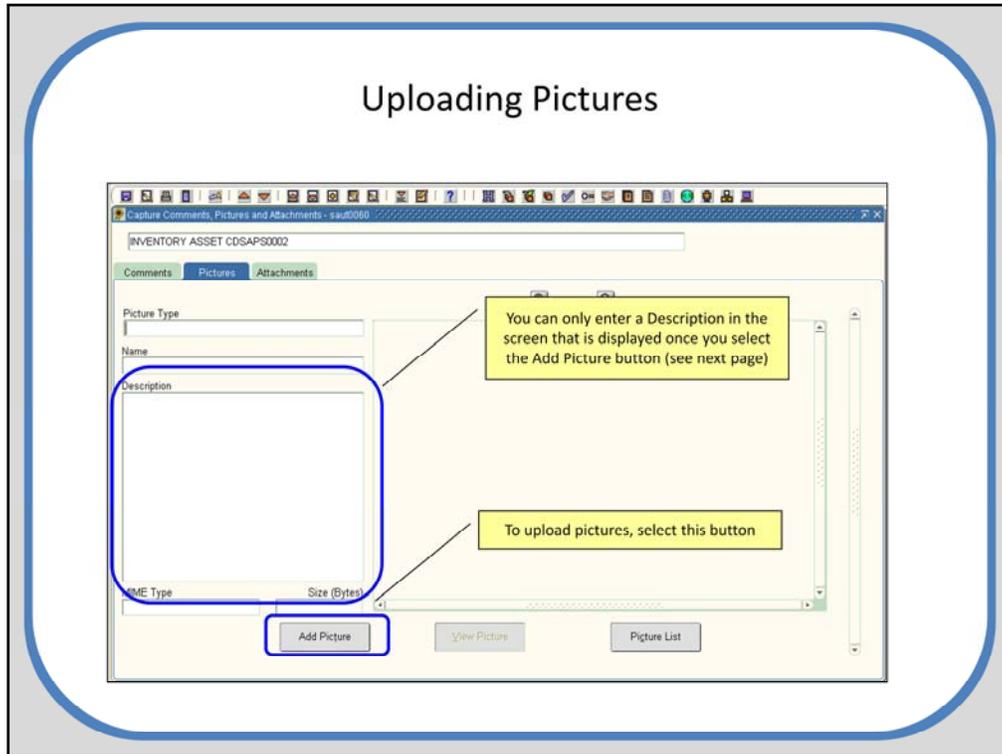
To add comments, pictures, or attachments to a property record, select the **Comments, Pictures and Attachments** button from the toolbar from any of the screens in Sunflower.

Use the **Tabs** within the form to write comments or attach pictures or other documents. Use the **Save** button when complete.

Note: Any **Comments, Pictures, or Attachments** created by the Cataloger *at the Catalog level* will be visible on any property records with that Catalog designation (i.e. Manufacturer/Model Number combination.) PCs can add additional pictures as needed.

See the following pages to learn more about uploading pictures.

Uploading Pictures



To attach a picture of a Catalog item, select the **Add Picture** button. See the next page for more information.

Note: You can only enter a Description in the screen that is displayed once you select the Add Picture button (see next page).

Uploading Pictures

Picture Upload

File

Picture Type
OTHER

Description
Enter a description here...

To attach a picture, select the Browse... button

You must enter the Description on this page – you cannot enter it once you select the Upload button

Use the **Browse** button to search for pictures to upload.

Note: You must enter the Description on this page – you cannot enter it after you have selected the **Upload** button.

Select the **Upload** button when you are ready to upload the picture.

Save the record when complete.

Lesson Summary

- You should now be able to:
 - Explain the Sunflower System's forms (windows)
 - Define key terms
 - Use the toolbar and shortcut keys
 - Describe Sunflower's Location relationships
 - Explain user defined and complex fields
 - Describe the Sunflowers System's Catalog
 - Explain how to manage errors
 - Explain how to conduct wildcard searches
 - Insert comments, pictures and attachments



Chapter 3: Acquisition and Asset Creation

Sunflower Assets 4.5

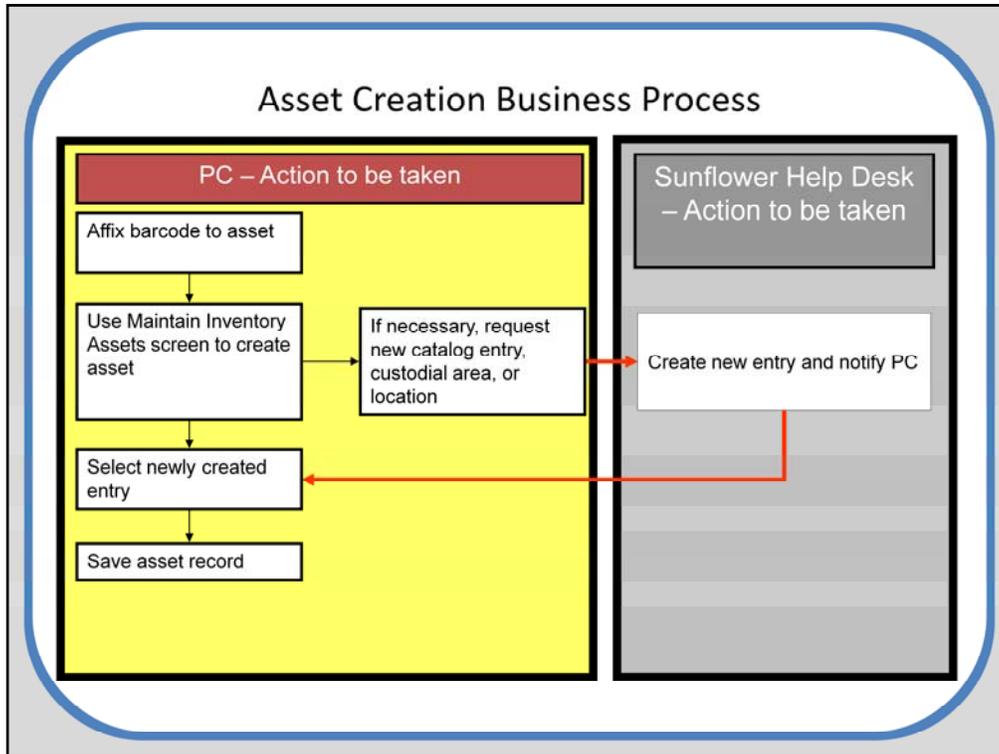
Lesson Objectives

- After this lesson you should be able to:
 - Recognize the types of asset creation a PC can do
 - Summarize the steps used to add an asset
 - Add an asset
 - Add assets using the 'duplicate' feature
 - Run the Hand Receipt Report
 - Search for assets using Serial Number
 - Query assets for common cost
 - Create a commodity asset

Asset Creation Initial Events

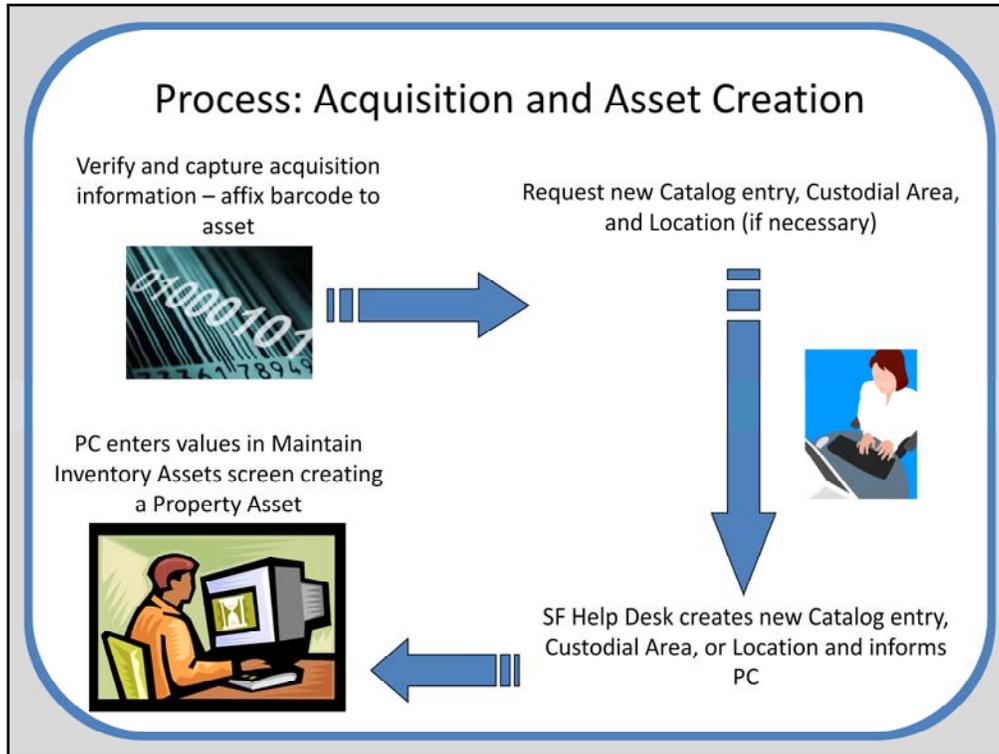
- Purchase Order
- Purchase Card
- Gift to Manager
- Found with Barcode
- Grant to Bureau
- Constructed
- Capital Lease
- Operating Lease
- Transfer in – from another Federal Agency
- Loan to Bureau
- Found – without Barcode
- NOAA Receive Excess Asset
- Acquired by Contractor

The Initial Events describe the circumstances of how the property item was acquired by DOC.



Users receiving assets, must notify the PC so that the PC may collect the supporting documentation. The PC will affix a barcode to the asset (if barcodes are needed, request one from the PAO).

Creating an asset in Sunflower involves documenting all the asset's details: barcode number, manufacturer, model number, serial number, initial event, asset value, bureau or region, custodial area, and location.



It may be necessary to search the Sunflower System using the Serial Number to determine if the property record is already in the system – if so, the asset should be reinstated, not created. To determine the approximate cost of an item, search other similar assets using the Manufacturer and Model Number combination. Both of these actions are described in the NAV documents later in this chapter.

Maintain Inventory Assets (1)

The screenshot shows the 'Maintain Inventory Assets' screen in Sunflower Enterprise. A blue box highlights the following fields: Barcode # (0000136/04), Manufacturer (DELL INC.), Model Number (PRECISION 340), and Model Name (PRECISION 340). Other visible fields include Unique Name, Default Location, Catalog Identifier (10036), Description (MICROCOMPUTER, DESKTOP, TOWER, M), Serial Number (39NSP11), Initial Event (PURCHASE), Asset Value (\$2,457.00), Acquisition Date (07/08/2002), Responsibility Date (07/06/2002), Effective Date (09/08/2007), Expected Return Date, Utilization Code (IN SERVICE), Activity Type (AGENCY OWNED), Bureau or Region (OS), Property Accountability Office (51OASA), Cust Area (51OAOA/TB), Accepted? (Y), Prop Custodian, Contact ID, Last Name, User, and Location (WASHINGTON, DC_BUILDING_HCHB_ROOM_1311). Buttons at the bottom include Page 2, Commodity, Comment / Picture / Attachment, and Re-Request.

The **Maintain Inventory Assets** screen is used to create assets in Sunflower. This is a very **Tab** sensitive screen, so as much as you can, tab through the screen to enter your information.

Area 1 Barcode and identify the property item here. The **Model** you select will be driven by the **Manufacturer** you select. Once these have been selected, the **Catalog Identifier** and **Official Name** will autofill.

Remember: The **Manufacturer**, **Model**, **Official Name**, and **Model Name** are all catalog driven. If the values you need are not in the LOVs, contact the Sunflower Help Desk to add the information to the system. Once the Sunflower Help Desk has input the new information, you should be notified as such.

Maintain Inventory Assets (2)

Area 2 Identify how and when the property item was acquired, as well as the cost and condition of the property item.

- **Initial Event:** How the property was acquired. Examples are Purchase Card, Purchase Order, Contract, etc. The **User Fields*** are “complex” fields (remember to double click), and are driven by the **Initial Event** selected. For example, if an asset has an Initial Event of **Gift to Manager**, the **User Fields*** would include the **Name of the Donor, Address of the Donor, Name of the Employee, Title of the Employee** and **Purpose**.
- **Acquisition Date:** The date the asset was received by DOC. If this date is not known (as may be the case with assets found during inventory), use the default date of the date the asset was entered into the Sunflower System.
- **Asset Value:** This field is “complex”, so remember to double click to open up the fields for data entry. The related **User Fields*** for Asset Value are required for Capital Assets.
- **Asset Condition:** May be changed as needed.
- **Utilization Code:** This will default to **IN SERVICE** – do not change.
- **Flags:** Double-click to expand this field. There is a list of asset flags that can be marked either “Y” or “N.” All default to “N.” Only change those that apply to “Y.”
- **Activity Type:** Select the appropriate activity type from the list of values. In most cases, an asset is agency owned.

Maintain Inventory Assets (3)

The screenshot shows the 'Inventory Assets' form in Sunflower Enterprise. The form includes the following fields and values:

- Barcode #: 0000134624
- Manufacturer: DELL INC.
- Description: MICROCOMPUTER, DESKTOP, TOWER, M
- Model Number: PRECISION 340
- Model Name: PRECISION 340
- Serial Number: 39N5P11
- Initial Event: PURCHASE
- Asset Value*: \$2,457.00
- Acquisition Date: 07/08/2002
- Responsibility Date: 07/06/2002
- Effective Date: 09/08/2007
- Expected Return Date:
- Utilization Code: IN SERVICE
- Flags*: S O
- Activity Type: AGENCY OWNED
- Bureau or Region: OS
- Property Accountability Office: 51OASA
- Cust Area: 51OAOA/ITB
- Accepted?: Y
- Prop Custodian:
- Contact ID: (empty)
- User: (empty)
- Location*: WASHINGTON, DC_BUILDING_HCHB_ROOM_1311

A blue box highlights the Bureau or Region, Cust Area, Contact ID, User, and Location* fields. A large number '3' is overlaid on the left side of the form.

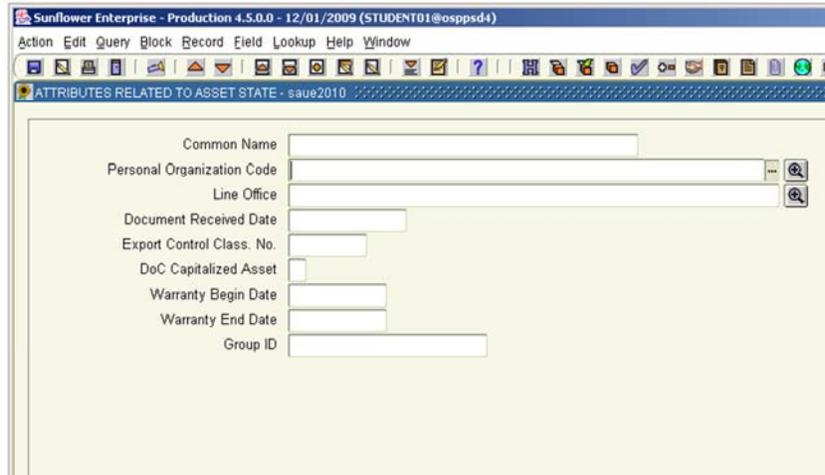
Area 3 Identify the Bureau or Region, PAO, Custodial Area (PC will populate automatically based on Custodial Area selected) responsible for the property, as well as the user and the location of the property item in this area.

Remember: The **Location*** field is a “complex” field, as identified by the asterisk. This means you need to open that field to enter the location information.

The **User** field is not currently required, but it is highly recommended that you enter an asset User.

To enter additional information about the asset, double click on the Global User fields

Global User Fields

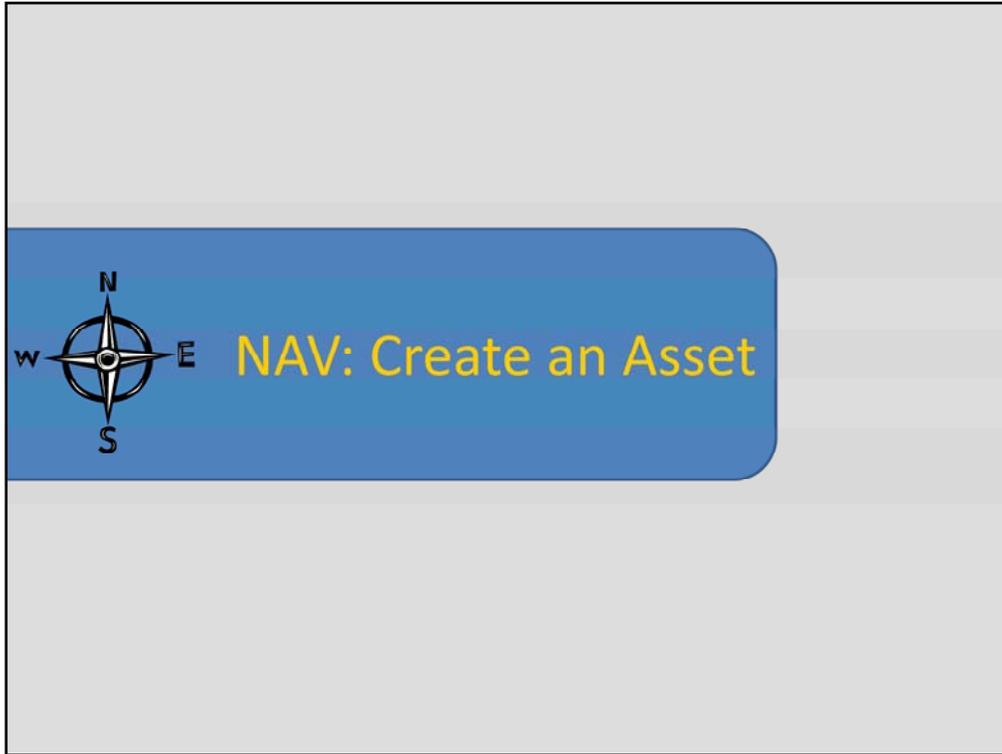


The screenshot displays a web-based interface for Sunflower Enterprise. The title bar indicates the version is Production 4.5.0.0, dated 12/01/2009, with the user ID STUDENT01@osppsd4. The menu bar includes Action, Edit, Query, Block, Record, Field, Lookup, Help, and Window. The toolbar contains various icons for navigation and data management. The main content area is titled "ATTRIBUTES RELATED TO ASSET STATE - saue2010" and contains the following fields:

Common Name	<input type="text"/>
Personal Organization Code	<input type="text"/>
Line Office	<input type="text"/>
Document Received Date	<input type="text"/>
Export Control Class. No.	<input type="text"/>
DoC Capitalized Asset	<input type="text"/>
Warranty Begin Date	<input type="text"/>
Warranty End Date	<input type="text"/>
Group ID	<input type="text"/>

The Global User fields are optional, but can be used to record additional information about the asset.

For example, the Warranty Begin and End Date fields allow you to capture important information around the warranty for the asset.



See Appendix for **Job Aid – Quick Step Asset Creation**

Asset Creation

Inventory Clerk

M > Mgmt > Maintain Inventory Assets

Maintain Inventory Assets

1. Enter the mandatory property information in the fields below, and **Tab** through the screen as you go.

Field	Description
Barcode #	Enter the new Barcode Number for the asset.
Manufacturer	Enter the name of the manufacturer of the asset. If a list of values appears, select the applicable standard manufacturer name from the list.
Model Number	Enter the model number for the asset. If a list of values appears on the screen, select the applicable standard model number from the screen. Once you Tab , the Catalog Number and Official Name fields will automatically populate (based on the Manufacturer and Model Number combination.)
Serial Number	Enter the serial number of the asset, if known. Otherwise leave it blank .

2. Complete the information on the source of the asset for the following fields:

Field	Description
Initial Event	Select the appropriate value about how the property was acquired from the LOV.
User Fields*	Enter additional information about the asset the User Fields* and Save . <u>Note:</u> These User Fields* will be driven by the Initial Event selection.
Asset Value*	Enter the acquisition value for the asset and Save . For capital assets be sure to complete the associated user fields: Bureau, FY, Fund Code, Organization, Program, Project, Task, Object Class Code, User Code, Adjust Depreciation From
Acquisition Date	Enter the date the item was received by DOC. If date is not known (as in the case of Found During Inventory, for example), Sunflower requires you to use the date the item was entered in Sunflower.
Responsibility Date	Enter the date the item was received by NIH. The date defaults to the same date as asset creation in Sunflower, however this date can be modified.
Asset Condition	Change if necessary.
Effective Date	The date defaults to the date a particular transaction occurred. For example, if the item was transferred to another PC or retired, the Effective Date will automatically change.

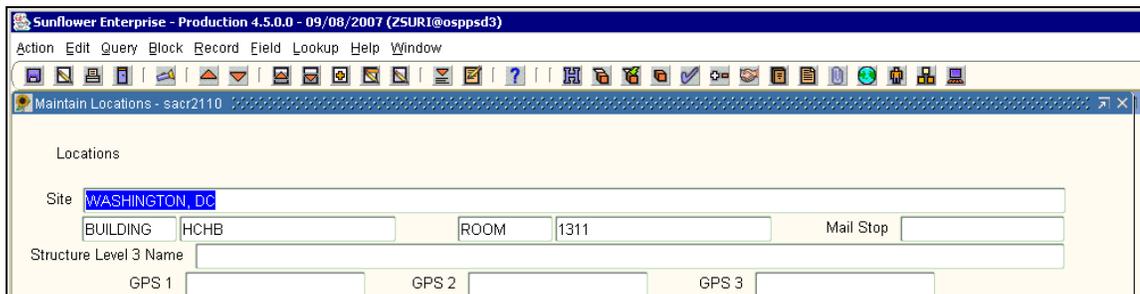
3. Complete the information to identify location and user information or select an option from the LOV for the following fields:

Field	Description
Utilization Code	Will autofill to IN SERVICE . Do not change.
Flags	Use the lookup to change the value, if necessary.
Activity Type	Select from a list of values. Typically assets are Agency Owned .
Bureau or Region	Identifies which Bureau or Region to which the asset is assigned.
Property Accountability Office	Will identify the PAO for the bureau or region selected.
Custodial Area	Enter your custodial area. This selection will automatically populate the Prop Custodian field.
Contact ID	Identifies the secondary Property Custodian for the asset. Select the Last Name from the list of values and then select a First name from the LOV. This will automatically populate the Secondary Custodian's ID in the Contact ID .

User	Select the Last Name from the list of values, and then select a First name from the LOV. This will automatically populate the User's badge number in the User field.
Location	Select the Location of the asset by double clicking into the field.
– Site	Enter or select using the LOV.
– Building	Enter or select using the LOV.
– Room	Enter or select using the LOV.

4. Select the **Location*** field to enter the location information.

Result: The **Maintain Locations** window opens:



5. Enter or select **Site** from the LOV.

6. Enter or select from the LOV a **Building** name and **Room** number in the requisite fields. Optionally enter **Mail Stop**.

7. Select the **Save** button from the toolbar to save the **Location** record.

8. Select the **Global User Field*** to enter the necessary asset Warranty information.

Result: The **Global User Field** window opens:

The screenshot shows a software window titled "ATTRIBUTES RELATED TO ASSET STATE - saue2010". The window contains a form with the following fields and values:

Field Name	Value
Common Name	
Personal Organization Code	
Line Office	
Document Received Date	
Export Control Class. No.	
DoC Capitalized Asset	
Warranty Begin Date	12/31/2008
Warranty End Date	12/31/2009
Group ID	

At the bottom of the window, there is a message field: "VARCHAR2(20) Enter name of group of which asset is a member" and "Record: 1/1".

9. If the asset is under warranty, enter both the **Warranty Begin Date** and the **Warranty End Date** in the correct format (MM/DD/YYYY), or selecting the LOV produces a calendar for populating the dates.
10. Select the **Save** button from the toolbar to save the **Global User Field** record.
11. Optionally, select the **Page 2** button at the bottom of the screen to view the catalog information associated with the manufacturer and model number for the asset.
12. Select the **Save** button from the toolbar to save the **Inventory Asset** record.

Result: The message field at the bottom of the screen will indicate the record is complete.

Example: Below is a complete **Maintain Inventory Assets** window:

Sunflower Enterprise - Production 4.5.0.0 - 12/01/2009 (STUDENT01@ospps4)

Exit Agree Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

Barcode #	CD0001755984	Barcode Type	A	Existing interest asset	Type	Barcode #	Released?	Y
Unique Name								
Default Location*	PITTSBURGH, PA							
Catalog Identifier*	149141	<input type="checkbox"/> Commodity Asset	Parents		0	Children	0	C/P/A
Manufacturer	DELL INC.	Model Number		LATITUDE D620				
Description	LAPTOP	Model Name		LATITUDE				
Serial Number	GOOTWB1	Drawing No.						
Initial Event	PURCHASE	User Fields*						
Asset Value*	\$1,680.00	Acquisition Date	09/27/2006	Responsibility Date	10/03/2006			
Asset Condition		Effective Date	12/01/2009	Expected Return Date				
Utilization Code	IN SERVICE	Flags*	S O	Activity Type	AGENCY OWNED			
Bureau or Region	ITA	Property Accountability Office	55005A					
Cust Area	55005A0DOEAST	Accepted?	Y	Prop Custodian	MACDONALD TERRI E CPPTM			
Contact ID		Last Name*		First		Mid		
User		Last Name*	GUNNER	First	STEVE	Mid		
Location*	PITTSBURGH, PA BUILDING _SMC2_ ROOM _16312							
Document*								
User Fields*								
Global User Fields*	12/31/2008**12/31/2009							

The tracking identifier assigned to the interest asset

Record: 14/14

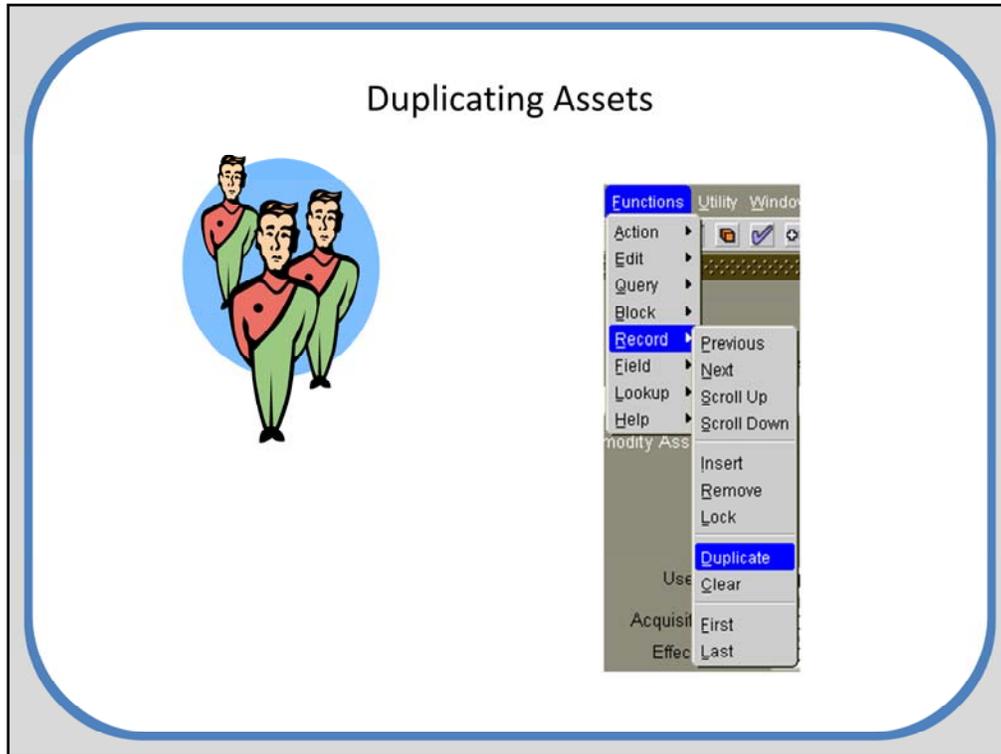
End of activity.



Create the following asset in Sunflower:

- Dell Laptop: Inspiron 1150
- Model Number: PP08L
- Serial Number: unavailable
- Barcode Number = CD01MMDDYYXX (where MM/DD/YY=Month, Day, Year, and XX=Your student number)
- Assign the asset to ITA as the Bureau (55) and your assigned Custodial Area for class
- For Location, select your office location.
- The Dell laptop was purchased September 5, 2009 and cost \$1399.00

Barcode #: _____



Occasionally you may have to add several property items of the same type (e.g. 20 Dell Inspiron 1150 laptops). From the **Maintain Inventory Assets** screen, follow the menu path shown above and the instructions on the following pages to barcode duplicate assets.



NAV: Add Assets Using Duplication

Manually Add Assets Using Duplication

Purpose

Use when you must manually add several assets of the same type (e.g. 20 Dell Inspiron 3500 laptops).

Inventory Clerk/ Inventory Manager
 M > Mgmt > Maintain Inventory Assets
 Maintain Inventory Assets

1. Enter the mandatory property information in the fields below, and **Tab** through the screen as you go.

Field	Description
Barcode #	Enter the new Barcode Number for the asset.
Manufacturer	Enter the name of the manufacturer of the asset. If a list of values appears, select the applicable standard manufacturer name from the list.
Model Number	Enter the model number for the asset. If a list of values appears on the screen, select the applicable standard model number from the screen. Once you Tab , the Catalog Number and Official

	Name fields will automatically populate (based on the Manufacturer and Model Number combination.)
Serial Number	Enter the serial number of the asset, if known. Otherwise leave it blank .

2. Complete the information on the source of the asset for the following fields:

Field	Description
Initial Event	Select the appropriate value about how the property was acquired from the LOV.
User Fields*	Enter additional information about the asset the User Fields* and Save . <u>Note:</u> These User Fields* will be driven by the Initial Event selection.
Asset Value*	Enter the acquisition value for the asset and Save . For capital assets be sure to complete the associated user fields: Bureau, FY, Fund Code, Organization, Program, Project, Task, Object Class Code, User Code, and Adjust Depreciation From.
Acquisition Date	Enter the date the item was received by DOC. If date is not known (as in the case of Found During Inventory, for example), Sunflower requires you to use the date the item was entered in Sunflower.
Responsibility Date	Enter the date the item was received by NIH. The date defaults to the same date as asset creation in Sunflower, however this date can be modified.
Asset Condition	Change if necessary.
Effective Date	The date defaults to the date a particular transaction occurred. For example, if the item was transferred to another PC or retired, the Effective Date will automatically change.

3. Complete the information to identify location and user information or select an option from the LOV for the following fields:

Field	Description
Utilization Code	Will autofill to IN SERVICE . Do not change.
Flags	Use the lookup to change the value, if necessary.
Activity Type	Select from a list of values. Typically assets are Agency Owned .
Bureau or Region	Identifies which Bureau or Region to which the asset is assigned.
Property Accountability Office	Will identify the PAO for the bureau or region selected.
Custodial Area	Enter your custodial area. This selection will automatically

	populate the Prop Custodian field.
Contact ID	Identifies the secondary Property Custodian for the asset. Select the Last Name from the list of values and then select a First name from the LOV. This will automatically populate the Secondary Custodian's ID in the Contact ID .
User	Select the Last Name from the list of values, and then select a First name from the LOV. This will automatically populate the User's badge number in the User field.
Location	Select the Location of the asset by double clicking into the field.
1. Site	Enter or select using the LOV.
2. Building	Enter or select using the LOV.
3. Room	Enter or select using the LOV.

4. Select the **Location*** field to enter the location information.

Result: The **Maintain Locations** window opens:

5. Enter or select **Site** from the LOV.
6. Enter or select from the LOV a **Building** name and **Room** number in the requisite fields. Optionally enter **Mail Stop**.
7. Select the **Save** button from the toolbar to save the **Location** record.
8. Optionally, select the **Page 2** button at the bottom of the screen to view the catalog information associated with the manufacturer and model number for the asset.
9. Select the **Save** button from the toolbar to save the **Inventory Asset** record.

Result: The message field at the bottom of the screen will indicate the record is complete.

Example: Below is a complete **Maintain Inventory Assets** window:

Sunflower Enterprise - Production 4.5.0.0 - 09/08/2007 (Z5URI@ospssd3)

Exit Agree Contract Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

Barcode # Barcode Type Existing interest asset Type Barcode # Released?

Unique Name

Default Location*

Catalog Identifier* Commodity Asset Parents Children C/P/A

Manufacturer Model Number

Description Model Name

Serial Number Drawing No.

Initial Event User Fields*

Asset Value* Acquisition Date Responsibility Date

Asset Condition Effective Date Expected Return Date

Utilization Code Flags* Activity Type

Bureau or Region Property Accountability Office

Cust Area Accepted? Prop Custodian

Contact ID Last Name* First Mid

User Last Name* First Mid

Location*

Document*

User Fields*

Global User Fields*

Page 2 Commodity Comment / Picture / Attachment Re-Request

10. Select the **Save** button from the toolbar to save the **Inventory Asset** record.

Result: The message field at the bottom of the screen will indicate the record is complete.

11. From the menu bar, select **Functions > Record > Duplicate**.

Result: The **Barcode Number** field is cleared and the words **Duplicate Record** appear above the **Barcode Number** field, as shown below:

Sunflower Enterprise - Production 4.5.0.0 - 09/08/2007 (Z5URI@ospssd3)

Exit Agree Contract Mgmt Entry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets Duplicate Record

Barcode # Barcode Type Existing interest asset Type Barcode # Released? Y

Unique Name

Default Location* Copy to Location?

Catalog Identifier* 10036 Commodity Asset Parents Children C/P/A

Manufacturer DELL INC. Model Number PRECISION 340

Description MICROCOMPUTER, DESKTOP, TOWER, MI Model Name PRECISION 340

Serial Number Drawing No.

Initial Event PURCHASE User Fields*

Asset Value* \$2,457.00 Acquisition Date 07/08/2002 Responsibility Date 07/26/2002

Asset Condition Effective Date 09/08/2007 Expected Return Date

Utilization Code IN SERVICE Flags* S O Activity Type AGENCY OWNED

Bureau or Region OS Property Accountability Office 51OASA

Cust Area 51OAOAIB Accepted? Prop Custodian

Contact ID Last Name* First Mid

User Last Name* First Mid

Location* WASHINGTON, DC_BUILDING_HCHB_ROOM_1311

Document*

User Fields*

Global User Fields*

Page 2 Commodity Comment / Picture / Attachment Re-Request

12. Enter a new **Barcode Number**.

13. Enter a new **Serial Number**, if known, otherwise leave the field blank.

14. Verify or update the **Custodial Area, Contact ID, User, and Location**.

15. Select the **Save** button from the toolbar to save the **Inventory Asset** record.

Result: The message field at the bottom of the screen will indicate the record is complete.

Example: Below is a duplicate asset record. Note the new **Barcode Number**:

Sunflower Enterprise - Production 4.5.0.0 - 09/08/2007 (ZSURI@ospps3)

Exit Agree Contract Mgmt Entry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Maintain Inventory Assets - asrm2010 (Page 1 of 2)

Inventory Assets

Barcode #	CDSAPS0002	Barcode Type		Type	Existing interest asset	Barcode #		Released?	Y
Unique Name									
Default Location*									
Catalog Identifier*	134663	<input type="checkbox"/> Commodity Asset	Parents	<input type="checkbox"/>	Children	<input type="checkbox"/>	C/P/A	<input type="checkbox"/>	<input checked="" type="checkbox"/> Copy to Location?
Manufacturer	DELL INC.	Model Number	1150 INSPIRON						
Description	LAPTOP COMPUTER	Model Name	INSPIRON						
Serial Number		Drawing No.							
Initial Event	PURCHASE	User Fields*							
Asset Value*	\$1,150.00	Acquisition Date	09/08/2007	Responsibility Date	09/08/2007				
Asset Condition	1 NEW OR UNUSED	Effective Date	09/08/2007	Expected Return Date					
Utilization Code	IN SERVICE	Flags*	O	Activity Type	AGENCY OWNED				
Bureau or Region	55	Property Accountability Office	55001A						
Cust Area	55001A001	Accepted?	Y	Prop Custodian					
Contact ID		Last Name*		First		Mid			
User		Last Name*		First		Mid			
Location*	WASHINGTON, DC_BUILDING_RONALD REAGAN_ROOM_M800								
Document*									
User Fields*									
Global User Fields*									

Page 2 Commodity Comment / Picture / Attachment Re-Request

End of activity.



Create the following asset in Sunflower:

- Duplicate the laptop from the Create an Asset Lab
- Dell Laptop: Inspiron 1150, Model Number: PP08L, Serial Number - Unavailable
- Barcode Number = CD02MMDDYYXX (MM/DD/YYYY=Month, Day, Year, and XX=Your student number)
- Assign the asset to ITA as the Bureau (55) and your assigned Custodial Area for class
- For Location, select your office location.
- The Dell laptop was purchased September 5, 2009 and cost \$1399.00

Barcode #: _____

Hand Receipt Report

Sunflower Enterprise							Page 1 of 2	
EXTD60							12/01/2009 13:37	
PERSONAL CUSTODY PROPERTY RECORD/HAND RECEIPT								
Barcode #	Barcode Type	Flags	Description	Manufacturer	Model Number	Serial Number	Acqst Value	Acqst Date
1818181818		B	LAPTOP	DELL INC.	INSPIRON 1420		2,000.00	12/01/2009
Unique Item :			Location : WASHINGTON, DC					
Cust Area : SICMENDAO			Location : BUILDING : 1120 10TH ST NW					
Property Custodian : CRAIG YUDANW YOUNG								
Current User : NIKKIE SCOTT BURGESS								
Fed. Equip. Group : GENERAL PURPOSE ADMS INCL. SOFTWARE, SUPPLIES AND SUPPORT								
Acqst Condition : 1			NEW OR USED					
Expected Return Date :								

Sunflower Enterprise							Page 2 of 2	
EXTD60							12/01/2009 13:37	
PERSONAL CUSTODY PROPERTY RECORD/HAND RECEIPT								
U. S. DEPARTMENT OF COMMERCE NATIONAL OCEANIC AND ATMOSPHERIC ADMINISTRATION PERSONAL CUSTODY PROPERTY RECORD/HAND RECEIPT REPORT AD OF: 12/01/2009								
STATEMENT OF RESPONSIBILITY:								
I, NIKKIE SCOTT BURGESS certify that I accept responsibility for all items of accountable personal property within my designated area. I understand that as the current user of government personal property, I am responsible for the proper use, care, and safeguarding of all personal property under my possession, custody, and/or control. I understand that the personal property under my possession, custody, and/or control is used only for Government purposes, and not for personal or private use. I understand that I must notify my Property Custodian before any change in utilization such as transfer to another user, excess request, and loan change. I understand that I must immediately notify my Property Custodian and supervisor of any personal property that is lost, missing, damaged, destroyed, and/or stolen under my possession, custody, and/or control. I understand it is my responsibility to return all personal property to my Property Custodian when it is no longer required for official Government purposes and/or upon my transfer or separation from the Government. I understand it is my responsibility to notify my Property Custodian prior to removing any personal property from a Federal building, to receive a property pass. Optional Form 7, I officially accept these responsibilities and all other responsibilities outlined in the Department's Personal Property Management Manual, until formally relieved.								
CUSTODIAL AREA: SICMENDAO								
CURRENT USER:								
NIKKIE SCOTT BURGESS								
NAME	TITLE	PHONE NO.	DATE	SIGNATURE				
PROPERTY CUSTODIAN:								
FRANKIE WINDOLE APRIL CRAWFORD								
NAME	TITLE	PHONE NO.	DATE	SIGNATURE				

The hand receipt is the complete inventory listing of items within one designated custodial area, and it is used to ensure accountability through a chain of custody.

- The chain of custody provides records that illustrate the location of accountable property and the individuals responsible for its care and safekeeping.
- This accounting must be continuous, from the time of ordering and acquisition, until the ultimate consumption or disposal of the property.
- The PMO physically signs the equipment down to one or more Property Accountability Officers (PAOs) on what is know as a hand receipt. PAOs then distribute this property down to the different custodial areas to Property Custodians (PCs) on hand receipts. PCs then finalize this process by hand receipting this equipment down to the end user (the person who actually uses the piece of equipment).

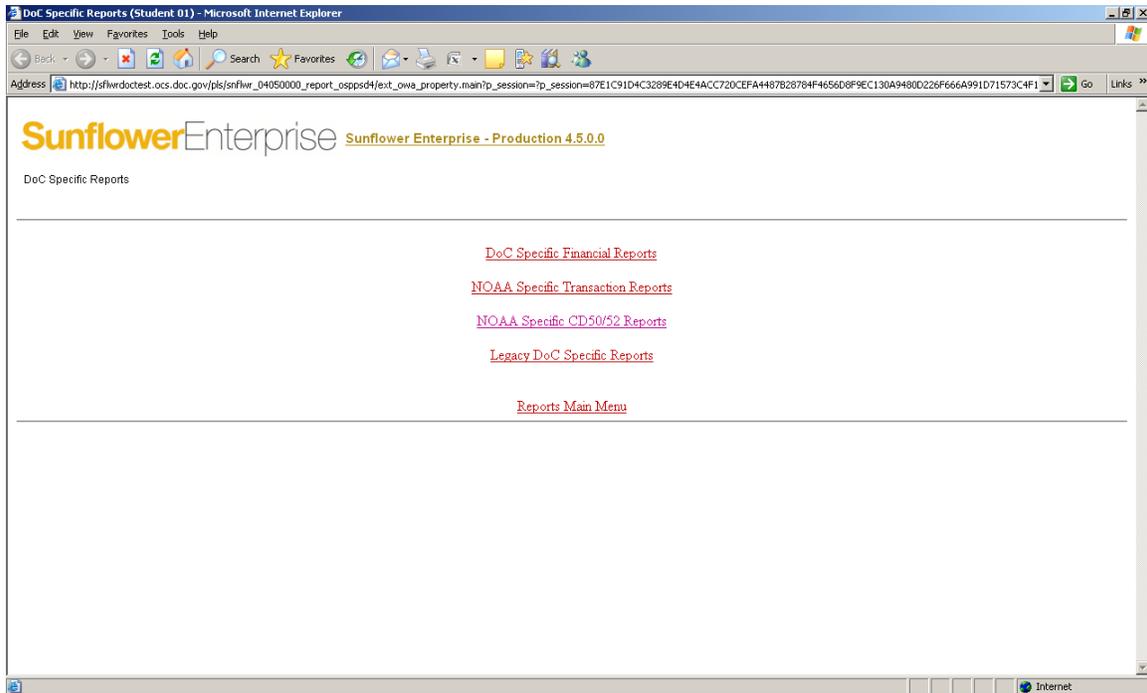


This NAV *“Run the Hand Receipt Report”* shows the step-by-step instructions for running the Hand Receipt Report.

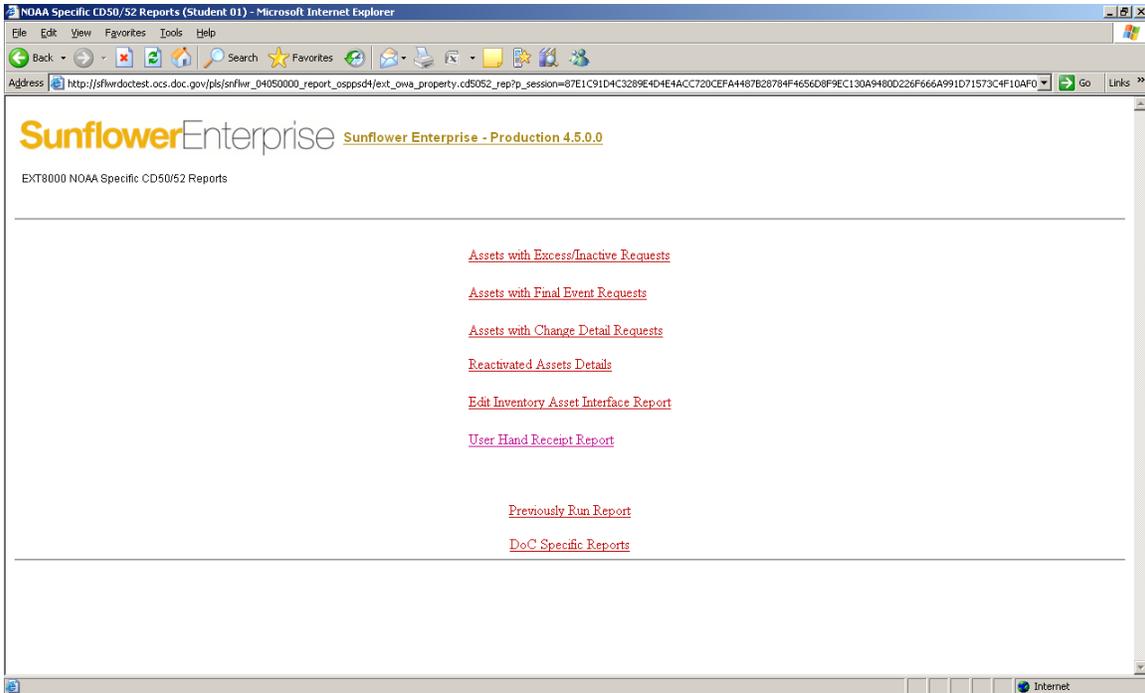
This report should be run whenever custody for an asset is established. Both the user and the PC should sign the Hand Receipt to acknowledge the responsibilities associated with custody of the asset.

Generate Hand Receipt

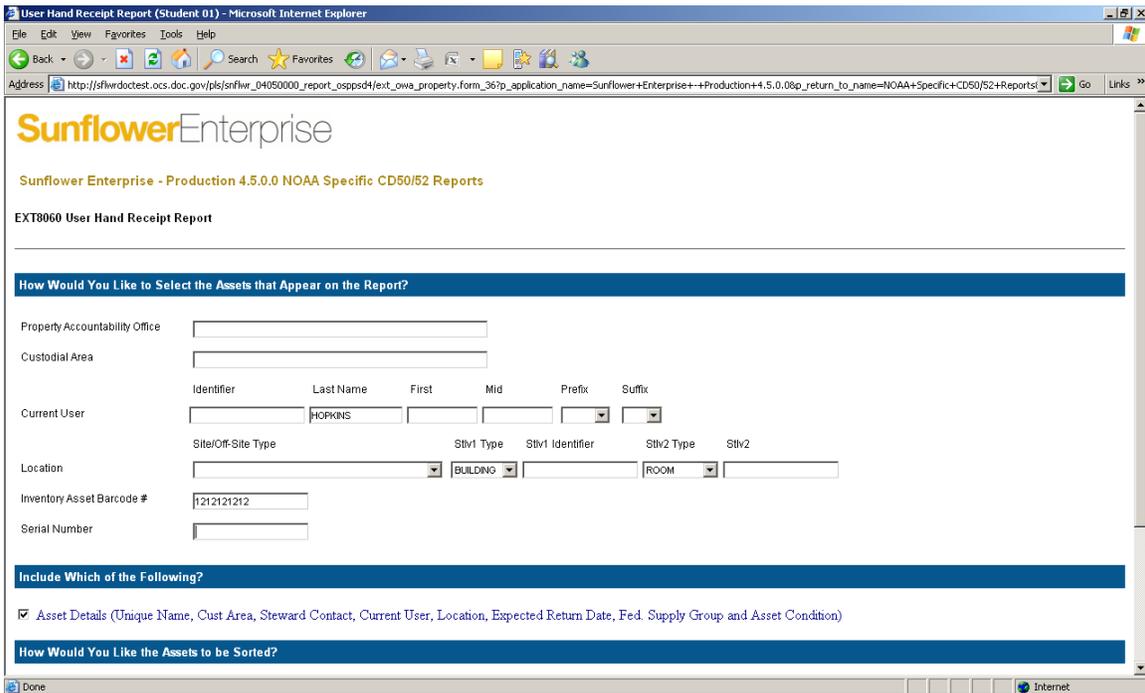
Inventory Clerk
M > Reports > User Defined Reports
NOAA Specific CD50/52 Reports



1. Select **NOAA Specific CD50/52 Reports**.



2. Select User Hand Receipt Report



3. Enter the End User by Identifier or Last Name and/or enter the Inventory Asset Barcode # being issued to the End User

User Hand Receipt Report (Student 01) - Microsoft Internet Explorer

Address: http://flhwdctest.ocs.doc.gov/pls/fwhr_04050000_report_00pp04/text_owa_property_form_36?p_application_name=Sunflower+Enterprise++Production+4.5.0.0&p_return_to_name=NOAA+Specific+CD50/52+Reports

How Would You Like to Select the Assets that Appear on the Report?

Property Accountability Office:

Custodial Area:

Current User: Identifier HOPKINS, Last Name , First , Mid , Prefix , Suffix

Location: Site/Off-Site Type , Stiv1 Type BUILDING, Stiv1 Identifier , Stiv2 Type ROOM, Stiv2

Inventory Asset Barcode #: 1212121212

Serial Number:

Include Which of the Following?

Asset Details (Unique Name, Cust Area, Steward Contact, Current User, Location, Expected Return Date, Fed. Supply Group and Asset Condition)

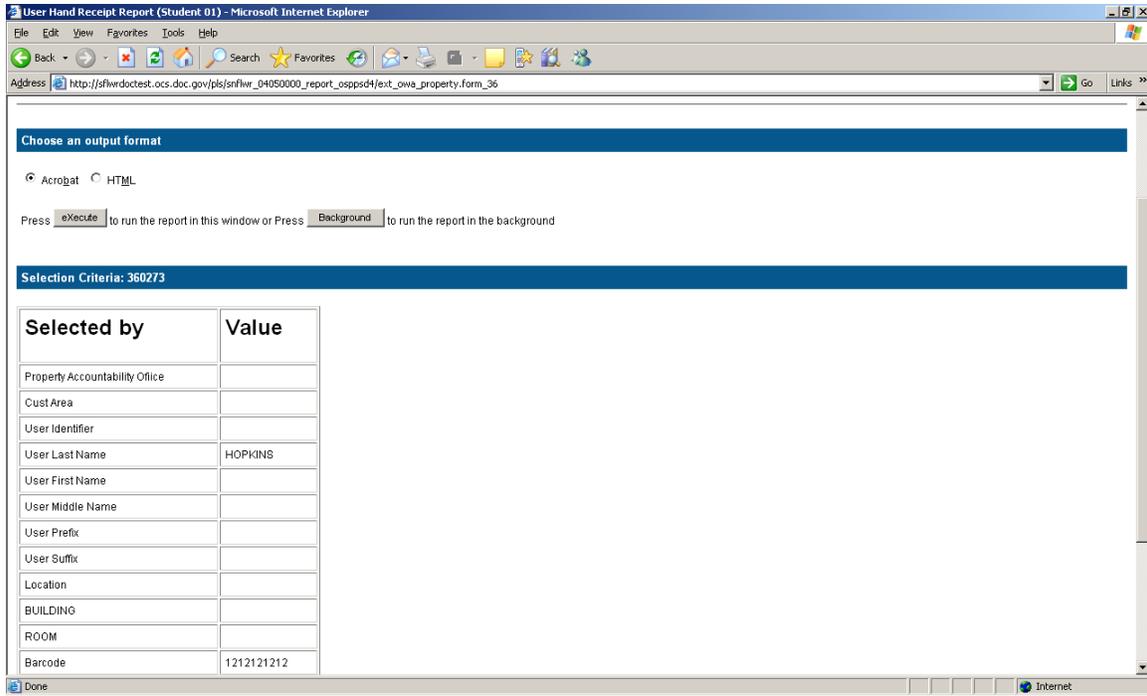
How Would You Like the Assets to be Sorted?

1 2 3

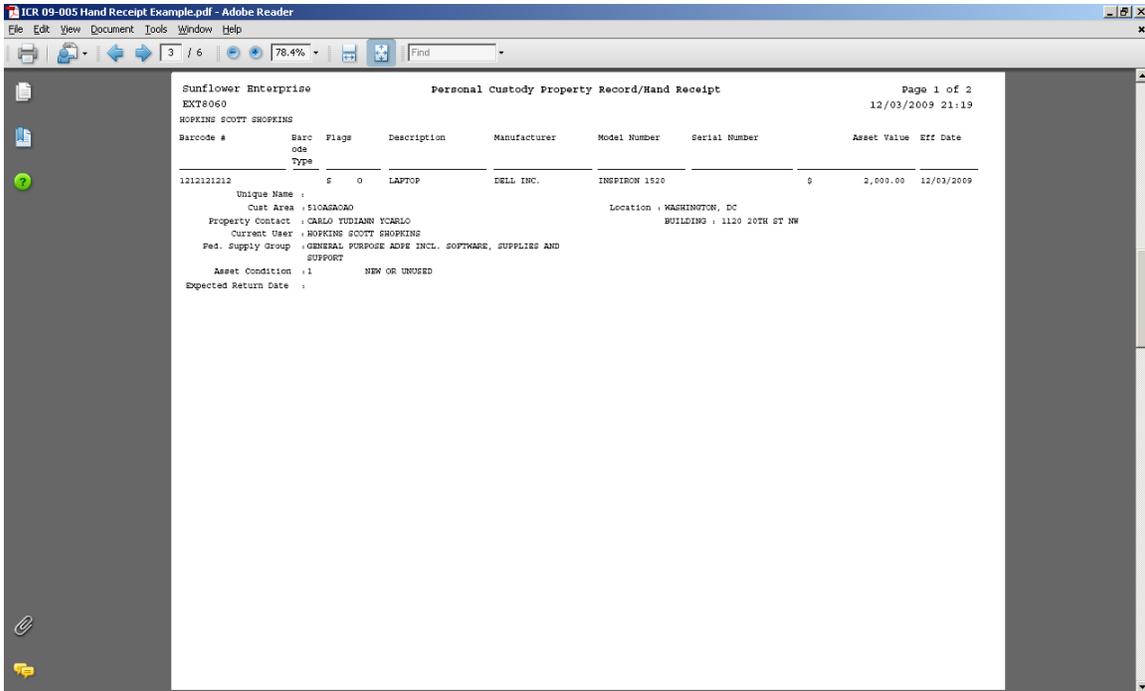
CURRENT USER BARCODE # BARCODE #

NOAA Specific CD50/52 Reports

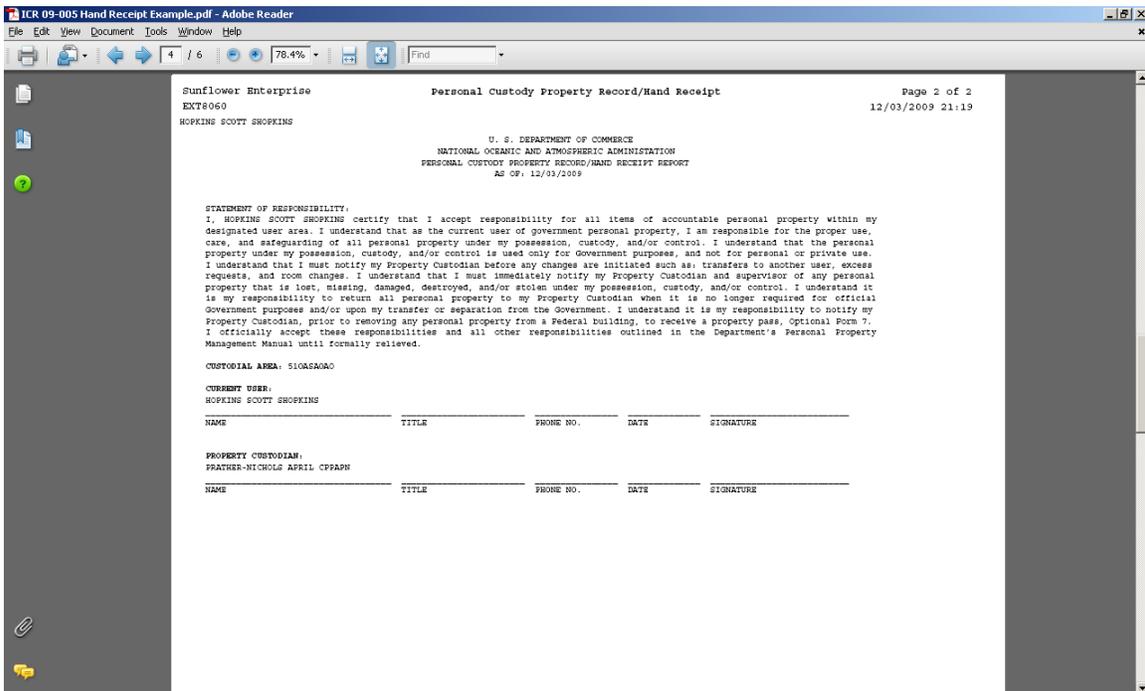
4. Ensure that the **Asset Details** box is checked.
5. Where multiple assets are being issued, select how the report should be **Sorted** after the **Current User**.
6. Select **Submit**.



7. Review the **Selection Criteria** if needed and select the **Acrobat Output Format**.
8. Select **Execute**.



9. The body of the resulting report has two sections. The first section lists details of those assets being assigned to the Current User.



10. The second section is the Hand Receipt to submission to the Current User for signature

End of activity.

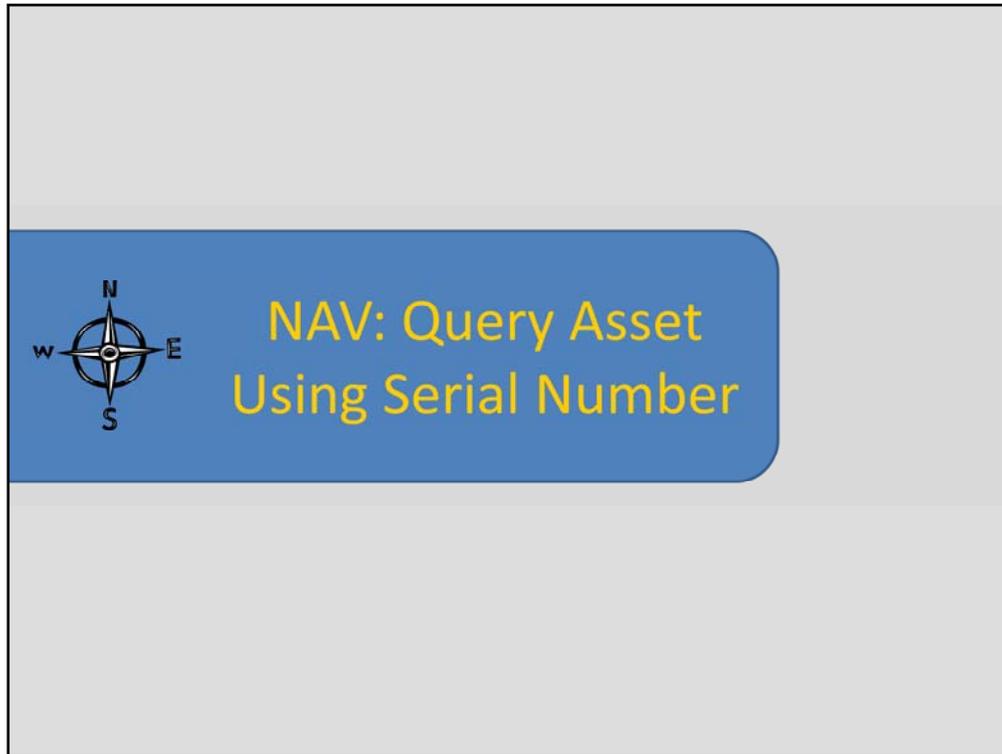
Generate Hand Receipt Report
 Sunflower Systems © 2009, All Rights Reserved
 SF 4.5

But What if...?

- Question:
What if I enter an asset and receive a message that states an asset with that Serial Number for the Manufacturer and Model Number already exists?
 - Answer:
Query Asset Using Serial Number
- Question:
What if I don't have any acquisition information for an asset?
 - Answer:
Query Item to Find Common Cost

Query Asset Using Serial Number is useful for determining if another asset exists in Sunflower with the same **Manufacturer + Model Name + Serial Number** combination. Sunflower will not allow a duplicate combination of these three fields to exist. If an error is received indicating another asset already contains those values, a PC may use the steps in the NAV *"Query Asset Using Serial Number"* to identify which asset it is and determine if it is the same asset or a different asset. An example of a time this might happen is when conducting the Review Campaign and the PC finds an asset and then tries to add it to Sunflower.

Query Item to Find Common Cost is an option to help determine an asset's value. For example, during the Review Campaign, the PC may find assets that have not been entered into Sunflower. The PC should then barcode these *Found During Inventory* assets and add them to Sunflower. If the acquisition documentation is not available, the PC may use the steps in the NAV *"Query Item to Find Common Cost"* to help determine cost.



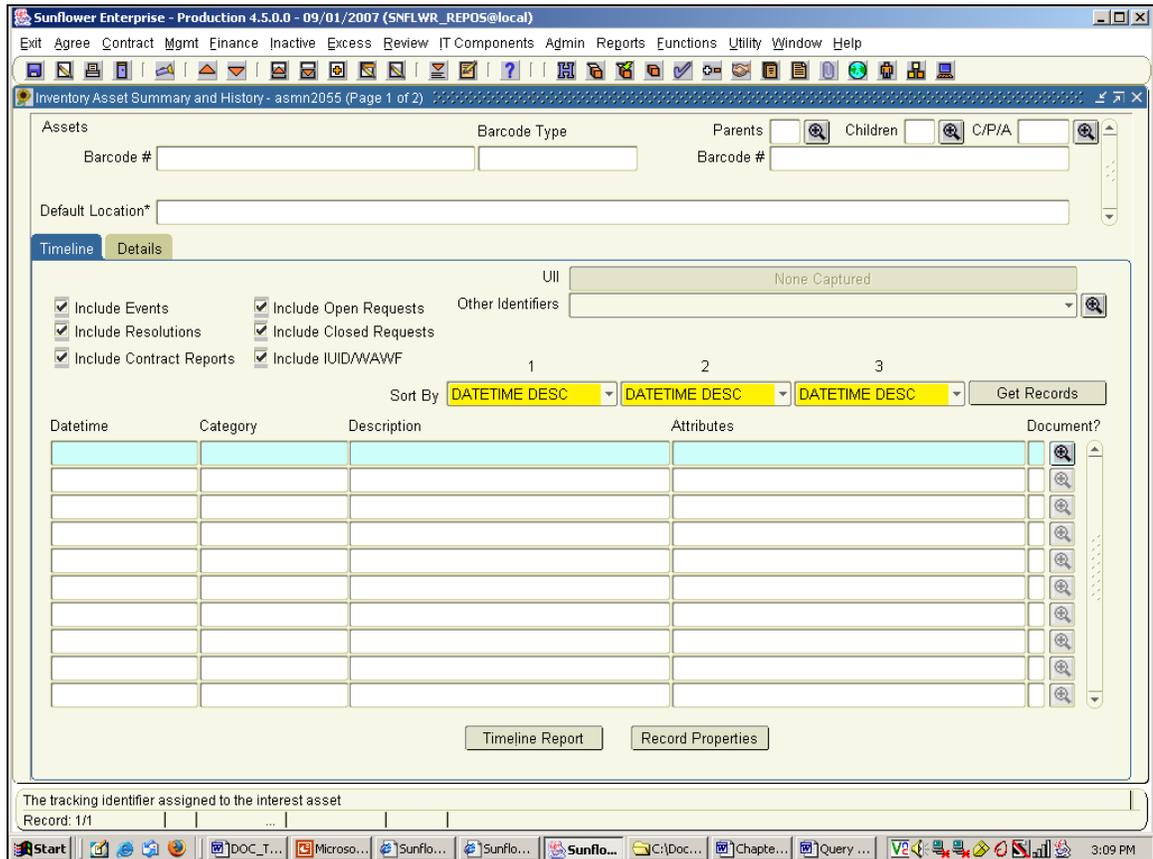
This NAV *“Query Asset Using Serial Number”* is useful for determining if another asset exists in Sunflower with the same **Manufacturer + Model Name + Serial Number** combination. Sunflower will not allow a duplicate combination of these three fields to exist. If an error is received indicating another asset already contains those values, a PC may search to identify which asset it is and determine if it is the same asset or a different asset. An example of when this might happen is when conducting the Review Campaign and the PC “finds” an asset and then tries to add it to Sunflower.

Query Asset Using Serial Number

Inventory Clerk/ Inventory Manager

M > Mgmt > Inventory Asset Summary and History

Inventory Asset Summary and History

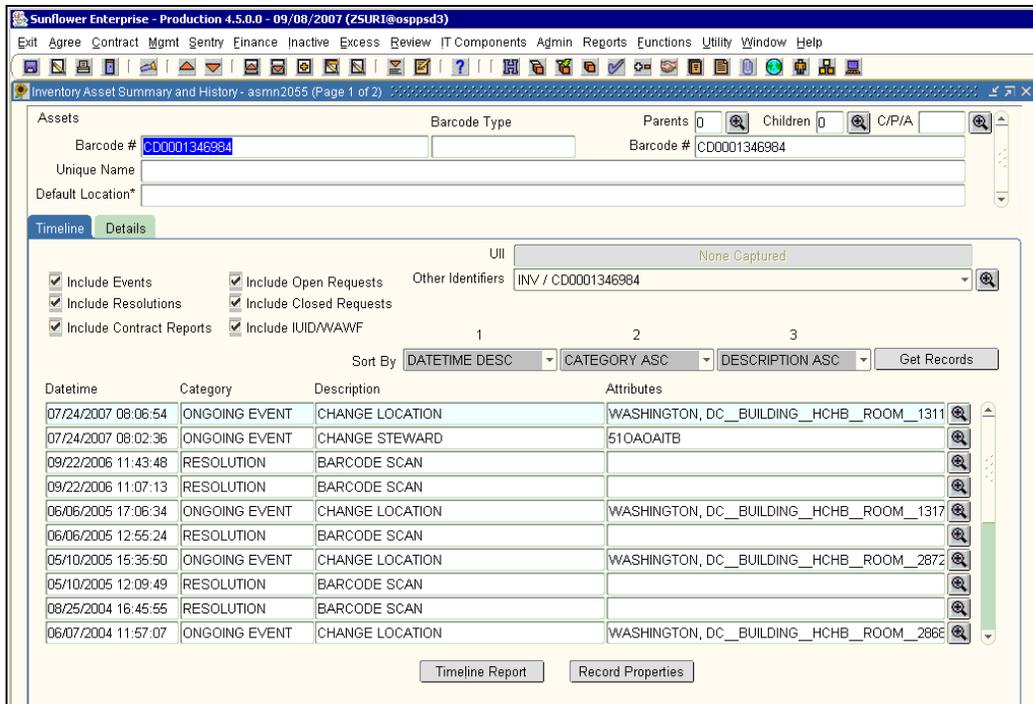


1. Select the **Find** button from the toolbar to bring up the **Query Criteria** screen.

Result: The **Query Criteria** window displays.

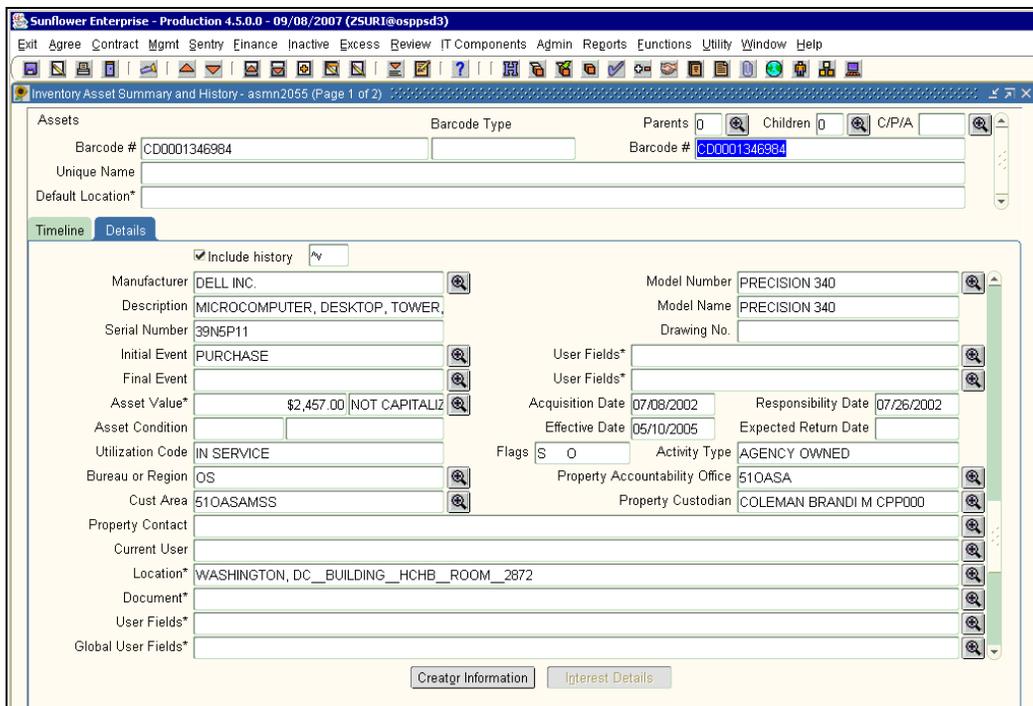
2. Enter the serial number of the asset in the **Serial Number** field.
3. Select the **Find** button from the toolbar once more.

Result: The asset information is populated to the **Inventory Asset and Summary History** screen and displays the timeline of the asset history.



4. To view the current asset information, select the **Details** tab.

Result: The Details of the property record history is displayed.



5. Use the **down arrow key** on the keyboard to move through the asset history.

6. To switch back to view the history of the asset, select the **Timeline** tab.

Query Asset Using Serial Number

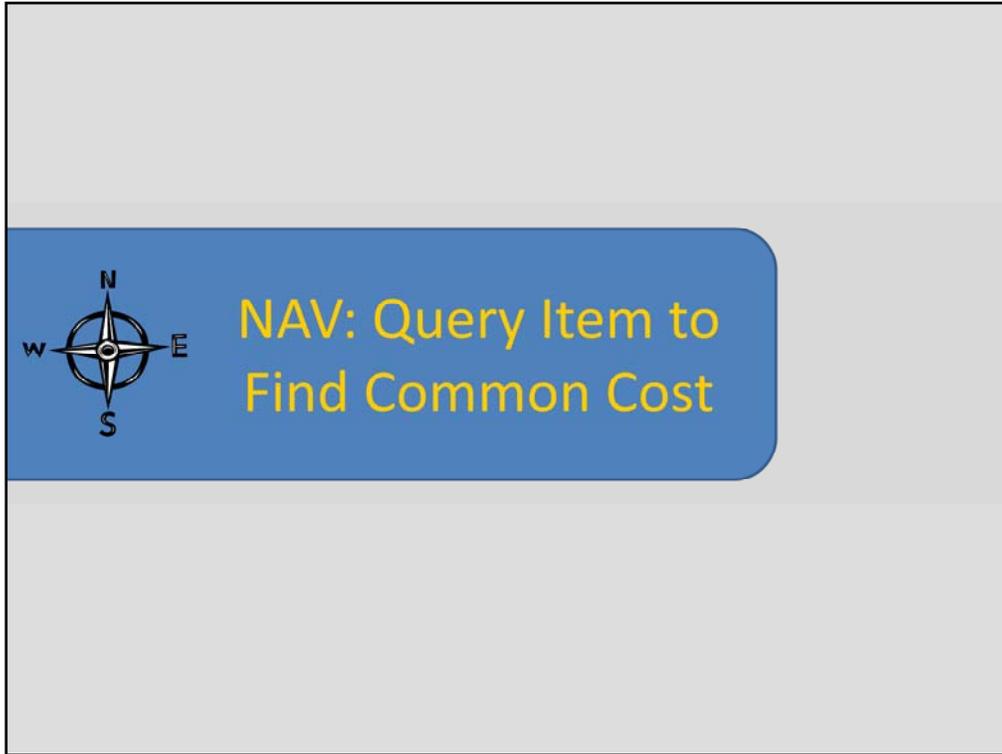
Sunflower Systems © 2009, All Rights Reserved

SF 4.5

Result: The timeline will display.

7. Continue scrolling through records as needed.

End of activity.



During the Review Campaign, the PC may find assets that have not been entered into Sunflower. The PC should then barcode these *Found During Inventory* assets and add them to Sunflower. If the acquisition documentation is not available, the PC may use the steps in this NAV “*Query Item to Find Common Cost*” to help determine an asset’s value.

Query Item to Find Common Cost

Inventory Clerk/ Inventory Manager

M > Mgmt > Asset Search

Asset Search

Search Criteria

Manufacturer Model Number

Description Model Name

Serial Number Fed. Supply Group

Asset Value Minimum Acquisition Date FSC

Agreement Assets Excess Assets Financial Assets Inactive Assets Inventory Assets Subset Assets

Assets

Barcode #	Manufacturer	Model Number	Description

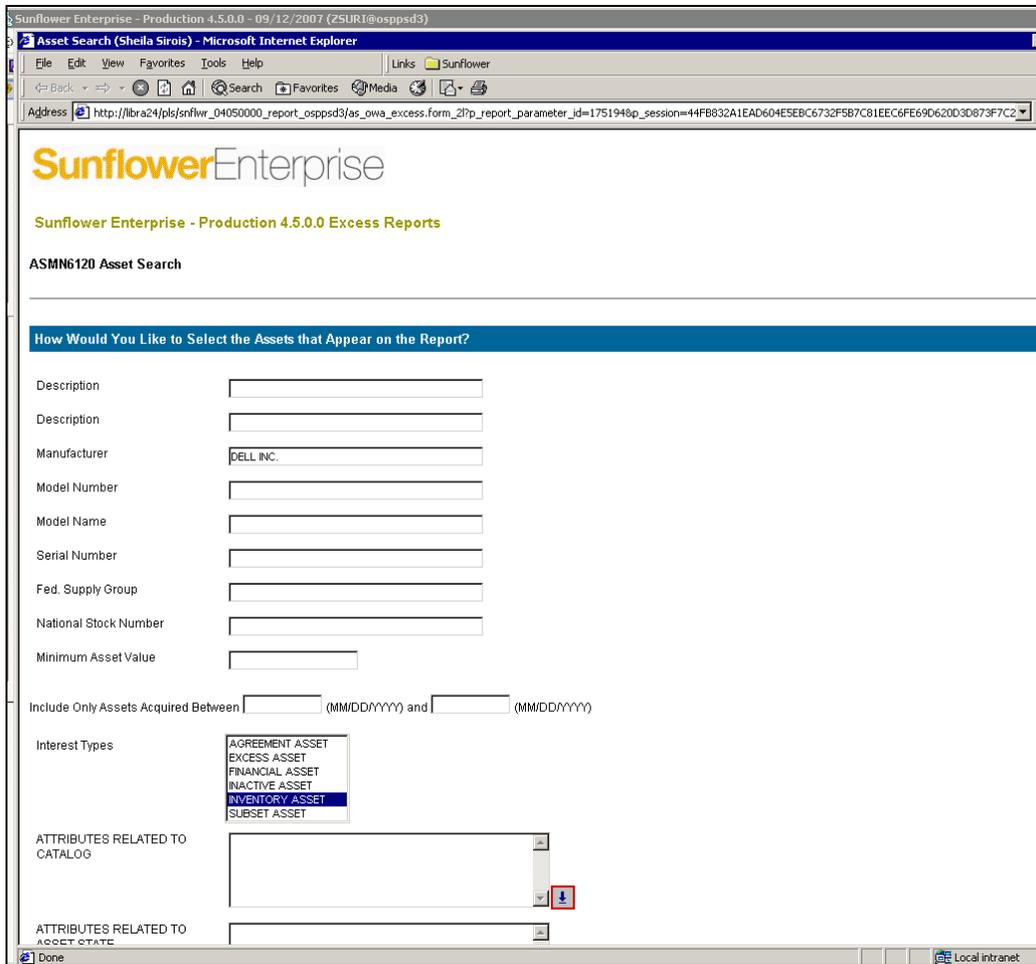
Report

1. Enter at least one field on which to query assets. Use the **LOV** button to look up valid values.

Note: When searching for costs of assets of the same type, search on **Manufacturer** and **Model Number**.

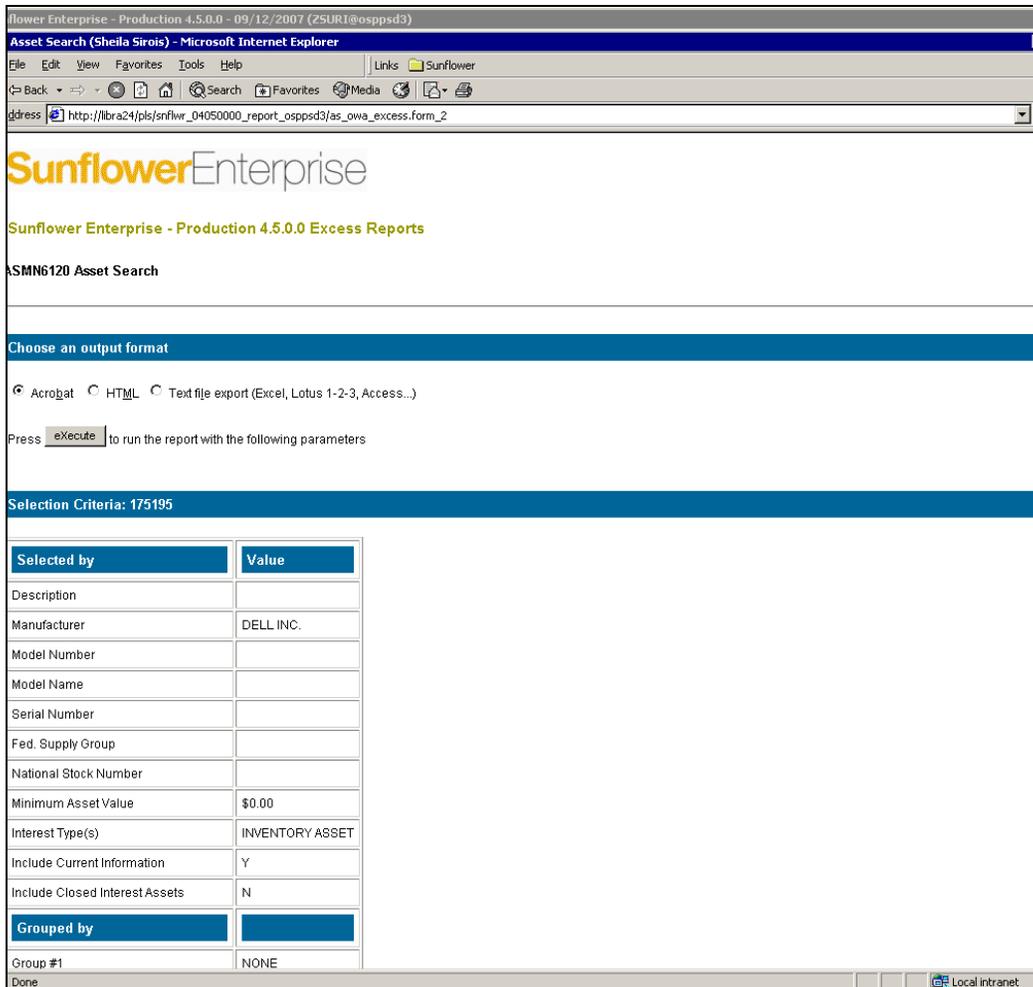
2. Select the **Inventory Assets** checkbox to search all assets currently in DOC inventory.
3. Select the **Report** button at the bottom to view the assets in a report format with property record details, including costs.

Result: The Asset Search report fields displays.



4. Select the **Submit** button to run the report.

Result: The review query screen displays.



5. Select the **Acrobat** radio button.
6. Select the **eXecute** button to run the report.

Result: The Asset Search Report displays. The last page provides a total of all assets found and the total cost. To calculate a common cost, divide the total cost by the number of assets found.

se		Asset Search				Page 7966 of 7967	
						09/12/2007 20:38	
Flags	Description	Manufacturer	Model Number	Serial Number	Asset Value	Acq Date	
S O	PROJECTOR, DIGITAL	DELL INC.	1100MP DLP	CDSAPS0013	\$ 950.00	09/09/2007	
	Cust Area : 55001A001		Location : WASHINGTON, DC				
	Property C :		BUILDING : HCHB	ROOM : 11			
	Phone :						
	Current Us : MCGRATH CHRIS 269333						
	Phone : 7574360200						
O	SERVER, AUTOMATIC DATA PROCESSING	DELL INC.	1400 POWEREDGE	CDSAPS0014	\$ 6,800.00	09/09/2007	
	Cust Area : 55001A001		Location : WASHINGTON, DC				
	Property C :		BUILDING : HCHB	ROOM : 11			
	Phone :						
	Current Us : MCGRATH CHRIS 269333						
	Phone : 7574360200						
S O	LAPTOP COMPUTER	DELL INC.	100L LATITUDE		\$ 1,200.00	09/10/2007	
	Cust Area : 55001A001		Location : WASHINGTON, DC				
	Property C :		BUILDING : HCHB	ROOM : 100			
	Phone :						
	Current Us :						
	Phone :						
			Total :	36540	\$ 97,151,340.65		
			Report Total :	36540	\$ 97,151,340.65		

End of activity.

Creating Commodity Assets

The screenshot displays the 'Maintain Inventory Assets' application. The main window is titled 'Maintain Inventory Assets - asmm2010 (Page 1 of 2)'. It features a menu bar with options like 'Exit', 'Agree', 'Contract', 'Mgmt', 'Finance', 'Inactive', 'Excess', 'Review', 'IT Components', 'Admin', 'Reports', 'Functions', 'Utility', 'Window', and 'Help'. Below the menu is a toolbar with various icons. The main form area is titled 'Inventory Assets' and contains several input fields: 'Barcode #', 'Barcode Type', 'Existing interest asset', 'Type', 'Barcode #', and 'Released?'. There are also checkboxes for 'Commodity Asset', 'Parents', 'Children', and 'CPIA'. A 'Copy to Location?' dropdown is also present. Below these are fields for 'Default Location*', 'Catalog Identifier*', 'Manufacturer', 'Description', 'Serial Number', 'Initial Event', 'Asset Value*', 'Asset Condition', 'Utilization Code', 'Bureau or Region', 'Cust Area', 'Contact ID', 'User', 'Location*', 'Document*', 'User Fields*', and 'Global User Fields*'. At the bottom of the main form, there are buttons for 'Page 2', 'Commodity' (highlighted with a blue circle), 'Comment / Picture / Attachment', and 'Re-Request'. A smaller dialog box titled 'Maintain Inventory Assets - asmm2010 (Page 3 of 3)' is overlaid on the main form. It is titled 'Commodity Information' and contains fields for 'Quantity', 'Unit of Measure', and 'Long Description' (with the text 'FURNACE, LABORATORY'). An 'Ok' button is located at the bottom of this dialog box. A large number '2' is visible in the bottom left corner of the main form area.

Area 2 Click on the **Commodity** button at the bottom of the form.

Complete the Commodity details and select the **OK** button when you are finished.

Select the **Save** button to save the commodity record.



NAV: Create a Commodity Asset

Commodity Asset Creation

Inventory Clerk

M > Mgmt > Maintain Inventory Assets

Maintain Inventory Assets

Inventory Assets

Barcode # Barcode Type Existing interest asset Type Barcode # Released?

Default Location* Copy to Location?

Catalog Identifier* Commodity Asset Parents Children C/P/A

Manufacturer Model Number

Description Model Name

Serial Number Drawing No.

Initial Event User Fields*

Asset Value* Acquisition Date Responsibility Date

Asset Condition Effective Date Expected Return Date

Utilization Code Flags* Activity Type

Bureau or Region Property Accountability Office

Cust Area Accepted? Property Custodian

Contact ID Last Name* First Mid

User Last Name* First Mid

Location*

Document*

User Fields*

Global User Fields*

Page 2 Commodity Comment / Picture / Attachment Re-Request

The tracking identifier assigned to the interest asset
Record: 1/1

1. Enter a . (period) in the **Barcode #** field and **Tab**.

Result – The system will automatically generate a barcode number.

2. Check the **Commodity Asset** checkbox next to the **Catalog Identifier** field.
3. Enter the mandatory property information in the fields below, and **Tab** through the screen as you go.

Field	Description
Manufacturer	Enter NON-BARCODED as the Manufacturer.
Model Number	Enter the model number for the asset. (Can be furniture, monitors, typewriters, etc.) Once you Tab , the Catalog Number and Description fields will automatically populate (based on the Manufacturer and Model Number combination.)
Serial Number	Enter the serial number of the asset, if known. Otherwise leave it blank .

4. Complete the information on the source of the asset for the following fields:

Field	Description
Initial Event	Select the appropriate value about how the property was acquired from the LOV.
User Fields*	Enter additional information about the asset the User Fields* and Save . <u>Note:</u> These User Fields* will be driven by the Initial Event selection.

Asset Value	Enter the acquisition value for the asset. <u>Note:</u> For Commodity Assets, the Asset Value field is not a complex field.
Acquisition Date	Enter the date the item was received by DOC. If date is not known (as in the case of Found During Inventory, for example), Sunflower requires you to use the date the item was entered in Sunflower.
Responsibility Date	Enter the date the item was received by DOC. The date defaults to the same date as asset creation in Sunflower, however this date can be modified.
Asset Condition	Change if necessary.
Effective Date	The date defaults to the date a particular transaction occurred. For example, if the item was transferred to another PC or retired, the Effective Date will automatically change.

5. Complete the information to identify location and user information or select an option from the LOV for the following fields:

Field	Description
Utilization Code	Will autofill to IN SERVICE . Do not change.
Flags	Set the Non Accountable flag to Y .
Activity Type	Select from a list of values. Typically assets are Agency Owned .
Bureau or Region	Identifies which Bureau or Region to which the asset is assigned.
Property Accountability Office	Will identify the PAO for the bureau or region selected.
Custodial Area	Enter your custodial area. This selection will automatically populate the Prop Custodian field.
Contact ID	Identifies the secondary Property Custodian for the asset. Select the Last Name from the list of values and then select a First name from the LOV. This will automatically populate the Secondary Custodian's ID in the Contact ID .
User	Select the Last Name from the list of values, and then select a First name from the LOV. This will automatically populate the User's badge number in the User field.
Location	Select the Location of the asset by double clicking into the field.
– Site	Enter or select using the LOV.
– Building	Enter or select using the LOV.
– Room	Enter or select using the LOV.

6. Select the **Location*** field to enter the location information.

Result: The **Maintain Locations** window opens:

7. Enter or select **Site** from the LOV.
8. Enter or select from the LOV a **Building** name and **Room** number in the requisite fields. Optionally enter **Mail Stop**.
9. Select the **Save** button from the toolbar to save the **Location** record.
10. Select the **Commodity** button at the bottom of the screen.

Result – The **Commodity Information** window opens:

11. Enter the **Quantity** of the assets. (e.g. **12**).
12. Enter the **Unit of Measure** (e.g. **Box**).
13. Enter a **Long Description** (e.g. **Office Furniture**). If necessary, type over the default information (i.e. the Description of the asset).
14. Select the **Ok** button.

Result: You are returned to the **Maintain Inventory Assets** screen.

Inventory Assets

Barcode # Barcode Type Existing interest asset Type Barcode # Released? Y

Unique Name

Default Location*

Catalog Identifier* Commodity Asset Parents Children C/P/A

Manufacturer Model Number

Description Model Name

Serial Number

Initial Event User Fields*

Asset Value Acquisition Date Responsibility Date

Asset Condition NEW OR UNUSED Effective Date Expected Return Date

Utilization Code Flags* Activity Type

Bureau or Region Property Accountability Office

Cust Area Accepted? Prop Custodian

Contact ID Last Name* First Mid

User Last Name* First Mid

Location*

Document*

User Fields*

Global User Fields*

FRM-40400: Transaction complete: 5 records applied and saved.
Record: 1/1

15. Select the **Save** button from the toolbar.

16. Select the **Global User Field**.

ATTRIBUTES RELATED TO ASSET STATE - saue2010

Common Name

Personal Organization Code

Line Office

Document Received Date

Export Control Class. No.

DoC Capitalized Asset

Warranty Begin Date

Warranty End Date

VARCHAR2(40) Name or Description Commonly Used
Record: 1/1

17. Enter any required information as may apply to creating a **Commodity Asset**.

18. Select the **Save** icon to close.

Result: The completed Maintain Inventory Asset screen returns.

19. Select the **Save** icon to save the record.

End of activity.

Lesson Summary

- You should now be able to:
 - Recognize the types of asset creation a PC can do
 - Summarize the steps used to add an asset
 - Add an asset
 - Add assets using the 'duplicate' feature
 - Run the Hand Receipt Report
 - Search for assets using Serial Number
 - Query assets for common cost
 - Create a commodity asset



Chapter 4: View Property Records

Sunflower Assets 4.5

Lesson Objectives

- After this lesson you should be able to:
 - Perform a quick search using the Maintain Inventory Assets screen
 - Perform a quick search using the Query Criteria screen
 - View the current status of a property record
 - View the timeline details of a property record
 - Perform a barcode number search to view the entire history of a property record
 - View the creator information of a property record
 - View the property record's Catalog information
 - Run reports listing the history of property records

Quick Search

The screenshot displays the 'Maintain Inventory Assets' screen in the Sunflower Enterprise software. The 'Barcode #' field is highlighted with a blue box, and a yellow callout box with the text 'Enter Barcode Number and Tab' points to it. The form contains various fields for asset information, including Manufacturer (DELL INC.), Description (MICROCOMPUTER, DESKTOP, TOWER, MI), and Acquisition Date (07/08/2002).

Use the **Maintain Inventory Assets** screen to get a quick glance at all of your custodial area's assets.

You can perform a quick search by typing the Barcode Number and selecting the **Tab** key to see the remaining asset information. Also, using the **Find** button from this screen, you can query all of your custodial area's assets and scroll through them one by one (see next page for an example of this query).

Query for Assets

Search using any number of criteria

Use the Execute button to execute the query

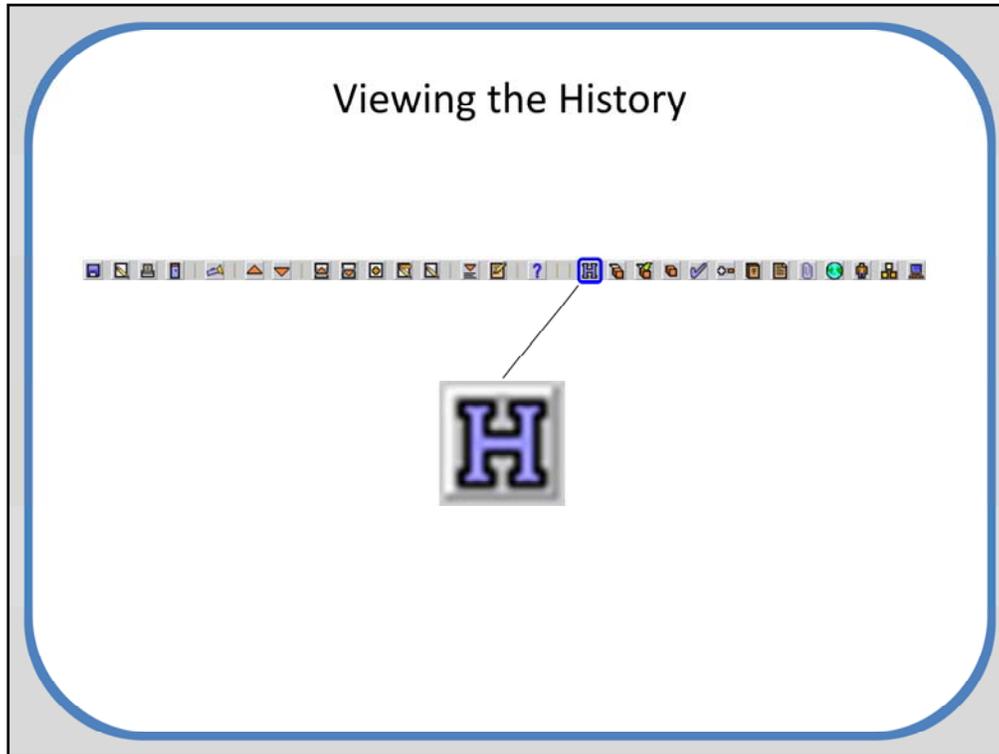
If you don't know a property record's Barcode Number, or if you want to view all of your custodial code's assets, from the **Maintain Inventory Assets** screen select the **Find** button from the toolbar.

Result: The **Query Criteria** window is displayed, as shown above.

Enter any criteria and select the **Execute** button to look up the property record.

Result: The **Maintain Inventory Assets** screen displays the record information (see previous page for example).

So, if you want to review all the assets for your custodial area, use this screen, then use the arrow keys on your keyboard to scroll through the assets.



By viewing an asset's summary and history, you can determine:

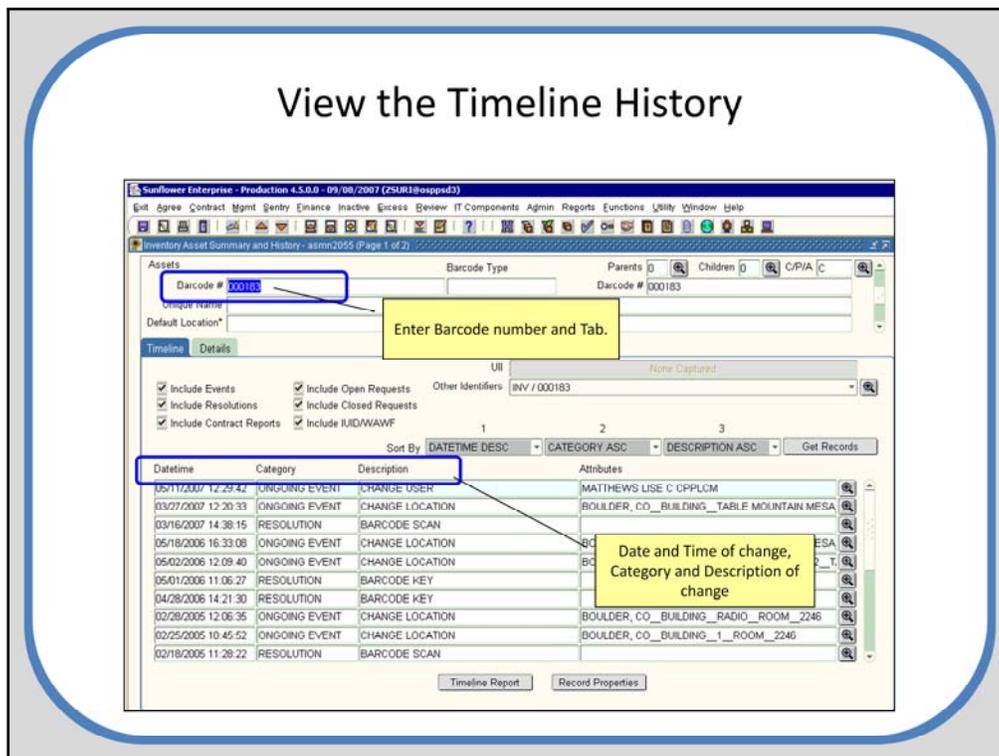
- The current status of an asset
- The history of an asset
- The creator information of an asset (Name of creator, time of asset creation)
- An asset's Catalog information (Manufacturer, Model Number, Official Name, FSC, Object Class, Life Expectancy, Sensitive Flag)

An asset's history can be viewed in two ways:

- 1.From any screen in the NBS Property System with a Barcode Number by selecting the **Summary & History** button from the toolbar, as shown above; or
- 2.Using the **Inventory Asset Summary and History** screen, discussed on the next page.

Important: The **Inventory Asset Summary and History** screen discussed in this chapter of the student guide is a *view only* screen. Updates cannot be made through this screen.

View the Timeline History



Use the **Inventory Asset Summary and History** screen to perform a barcode number search on the current status of any custodial area's property records.

Enter the **Barcode Number** and select the **Tab** key. The timeline information will display.

In the above screen shot, note the columns showing the history of changes for the property record:

- Datetime – records the date and time the change/update was made
- Category – describes the type of change related to the asset lifecycle
- Description – brief description of change/update
- Attributes – the field and entry change/update
- Lookup – drill down to other associated forms identifying the change/update

To view all details of the property record history, clear the form, then select the **Details** tab. Select the **Include History** checkbox. Enter the **Barcode Number** and tab. Notice the Include History display box is populated.

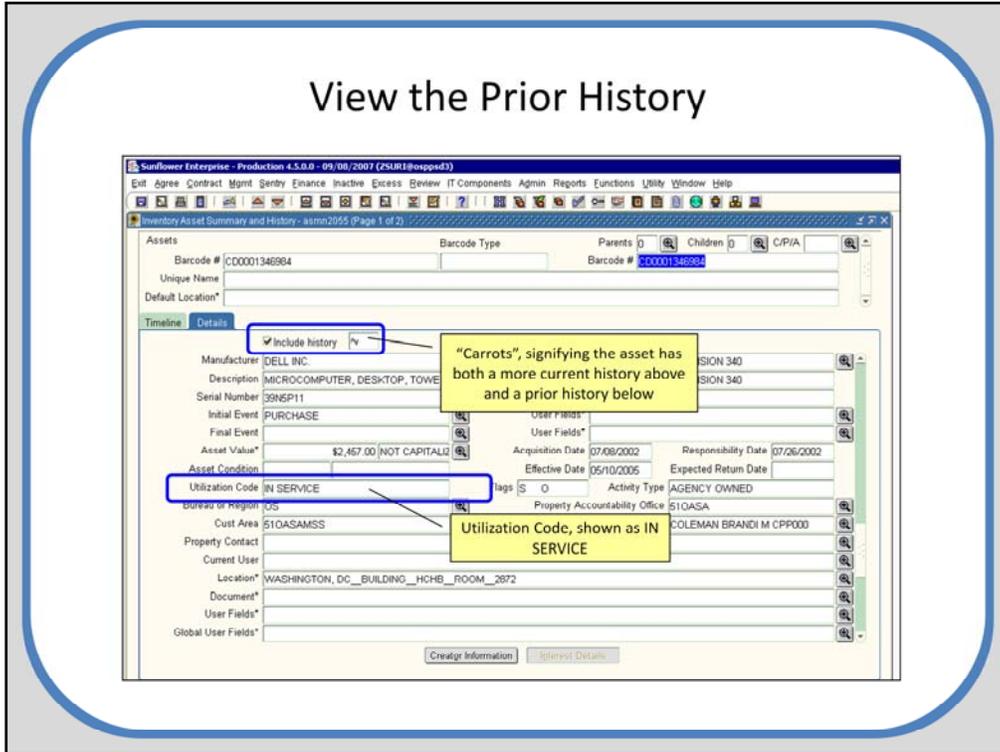
Also, the downwards pointing “carat” signifies the asset has a prior history. Since the “carat” only points down, that means we are looking at the most current information for this asset.

Note 1: Use the **arrow keys** on the keyboard, the **Next Record** button on the toolbar, or the **Vertical Scrollbar** to scroll and view the asset’s history.

Note 2: When scrolling through the history of the asset, the warning “At first record” means you have reached the most current history of the asset. Conversely, the warning “At last record” actually means you have reached the very first (i.e. the oldest) history of the asset.

Note 3: When switching between assets, a pop-up window warning appears reminding you that a different asset will appear.

View the Prior History



In this example, note both the upwards pointing “carrot” and the downwards pointing “carrot”, which signifies the asset has both a more current history above and a prior history below.

Also, note the **Utilization Code**, which shows the asset as being **IN SERVICE**.

Note: The **Effective Date** will change based on when certain information on the property record is changed, for example Bureau, User, Location, and Custodial Area.

View the Oldest History

In this example, note the upwards pointing “carrot”, which signifies the asset has more current history above. Since the “carrot” only points up, that means we are looking at the oldest information for this asset.

Also, note the **Act Status/Type**, which shows the asset as being **IN SERVICE**.

To read about viewing the **Creator Information**, see the next page.

Note: If an asset has, in the past, been retired and reinstated, the most recent history of the record will show the newest Initial Event but no Final Event (since it is currently an active asset). As you scroll back in the history, the record will show the previous Initial Events and Final Events.

View the Creator Information



The screenshot shows a window titled "Creator Information" with a close button (X) in the top right corner. The window content is as follows:

Transaction Creator Information			
Asset State Created	08/29/2002 08:09:12	By	WILLIAMS ELOISE P CPPPXW
		Recorded By	WILLIAMS ELOISE P CPPPXW
Interest Asset State Created	08/29/2002 08:09:13	By	WILLIAMS ELOISE P CPPPXW
		Recorded By	WILLIAMS ELOISE P CPPPXW

Each "By" and "Recorded By" field has a small magnifying glass icon to its right, indicating a search or lookup function.

When you select the **Creator Information** button as shown on the previous page, you can view who created the record along with the date the record was created. You can also view who last updated the record.

View Initial Event User Defined Fields

The screenshot displays a software interface with two main windows. The top window, titled 'Inventory Asset Summary and History - asmt005 (Page 1 of 2)', shows asset information for 'ASMT5'. Key fields include 'Barcode Type', 'Barcode # CCCC01340984', 'Manufacturer DELL INC', 'Description MICROCOMPUTER, DESKTOP, TOWER', 'Model Number PRECISION 3400', and 'Model Name PRECISION 3400'. The 'Initial Event' is set to 'PURCHASE', and the 'Asset Value' is '\$2,557.00 NOT CAPITALS'. A 'User Fields' section is visible, which is expanded in the bottom window. The bottom window, titled 'Maintain Organizations - asu2033', shows a table with columns for 'Organization Type' and 'Parent'. A yellow callout box labeled 'User Defined Fields opened up' points to this table.

Initial Event – Purchase

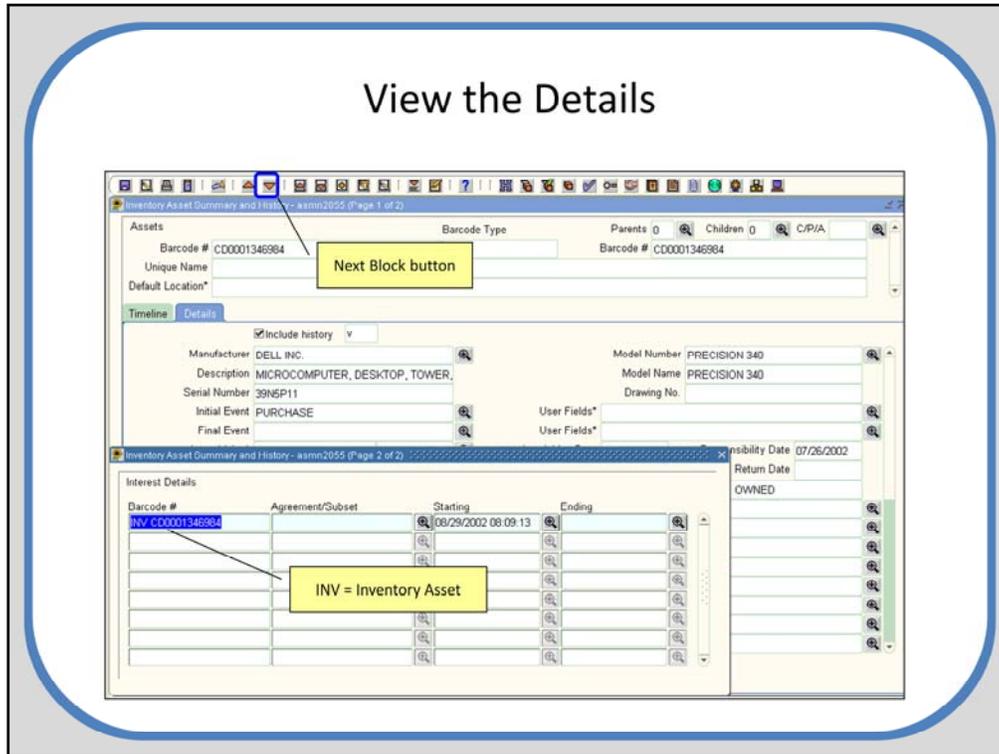
User Defined Fields

User Defined Fields opened up

To view more information about the purchase of an item, open the **User Fields*** next to the **Initial Event**.

Above is an example of a capital asset with all the required fields completed.

View the Details



To view specific details about when the property's status changed, select the **Next Block** button from the toolbar.

In this example, the **Inventory Asset** (property record) was created on 08/29/2002. This means the asset was barcoded on 08/29/2002.

Note: If an asset is given a final event (retired) and then reinstated, the history of the asset *before* reinstatement will always show the final event associated with the retirement. Only the history *after* reinstatement will have no final event shown.

View the Details

The screenshot displays the 'Inventory Asset Summary and History' window for asset ID CC0001346984. The main form shows the following details:

- Barcode #: CC0001346984
- Manufacturer: DELL INC.
- Description: MICROCOMPUTER, DESKTOP, TOWER
- Serial Number: 39NSP11
- Initial Event: PURCHASE
- Asset Value: \$2,557.00 (NOT CAPITAL)
- Model Number: PRECISION 340
- Model Name: PRECISION 340
- Acq. Date: 08/29/2002
- Responsibility Date: 07/26/2002
- Type: AGENCY OWNED

Three callout boxes provide further detail:

- Asset Value details:** Points to the 'Asset Value' field.
- Asset Value Component Summary:** A table showing the breakdown of the asset value.
- Asset Value Component Details:** A table showing the specific components and their values.

Value Type	Asset Value	Quantity
	\$2,557.00	
Total Value: \$2,557.00		

Date	Asset Value (User Field)	Chg?	Person
08/29/2002	\$2,457.00	SI*	WILLIAMS ELOISE P ORPPOW
09/08/2007	\$100.00	SI*	SIXOS SHELIA SIXOS

To view specific details about a property detail, select the **Details (plus sign)** button next to the field.

In this example, the **Asset Value** was updated on 09/08/2007.

View the Catalog Information

Maintain Catalog Entries - asfmsmznl (Page 1 of 2)

Catalogs

Identifier: 10036
Manufacturer*: DELL INC. Reviewed?

Model Number: PRECISION 340
Description: MICROCOMPUTER, DESKTOP, TOWER, MINI-TOWER
Model Name: PRECISION 340
Fed. Supply Group: GENERAL PURPOSE ADPE INCL. SOFTWARE, SUPPLIES AND SUPPORT

Service Life (yrs): 7 Salvage Value: 1
Override Service Life (yrs): Override Salvage Value %:
Replacement Value:

Federal Supply Classification: 70 42 MINI AND MICRO COMPUTER CONTROL DEVICES

Stock Number: Begin Date: End Date: 07/01/2006
User Fields*: 704202

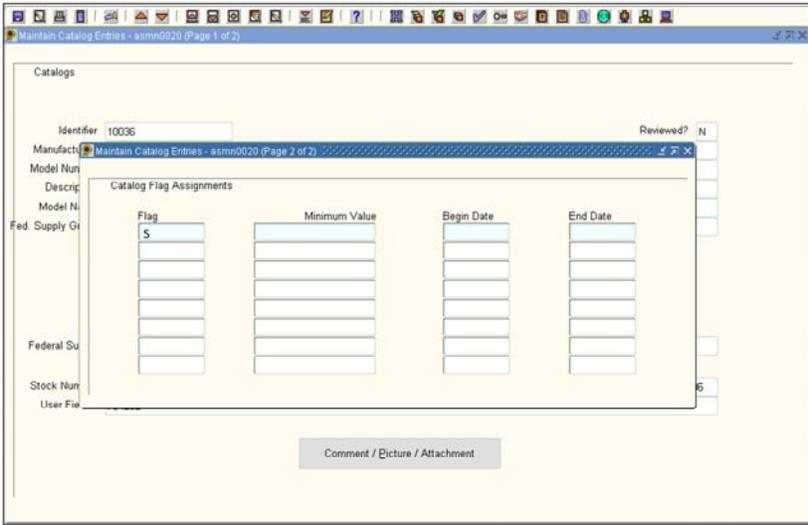
Comment / Picture / Attachment

A property record's catalog information can be viewed by selecting the **Catalog** button from the toolbar from any screen in the Sunflower System.

Note: To view whether or not the Catalog item is **Sensitive**, select the **Next Block** button from the toolbar (see example on next page.)

Remember: Contact the Administrator for catalog updates.

View Sensitive Catalog Information



This view shows whether or not the catalog item is **Sensitive**.

Note: If the **Sensitive** flag on the Catalog is changed, it will not be reflected on the property records with those Catalog items until a transaction occurs on each of those records.



NAV: View Asset Timeline History

View Asset Timeline History

Inventory Clerk/ Inventory Manager

M > Mgmt > Inventory Asset Summary and History

Inventory Asset Summary and History

Sunflower Enterprise - Production 4.5.0.0 - 09/01/2007 (SNFLWR_REPOS@local)

Exit Agree Contract Mgmt Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets Barcode # Barcode Type Parents Children C/P/A

Default Location*

Timeline Details

UII None Captured

Include Events Include Open Requests Other Identifiers

Include Resolutions Include Closed Requests

Include Contract Reports Include IUID/WAWF

Sort By 1 2 3

DATETIME DESC DATETIME DESC DATETIME DESC Get Records

Datetime	Category	Description	Attributes	Document?

Timeline Report Record Properties

The tracking identifier assigned to the interest asset

Record: 1/1

If you want to search by barcode number, goto task #1. Otherwise, goto task #4.

1. Enter the barcode number in the **Barcode #** field.
2. **Tab** out of the field.

Result: The timeline history autofills.

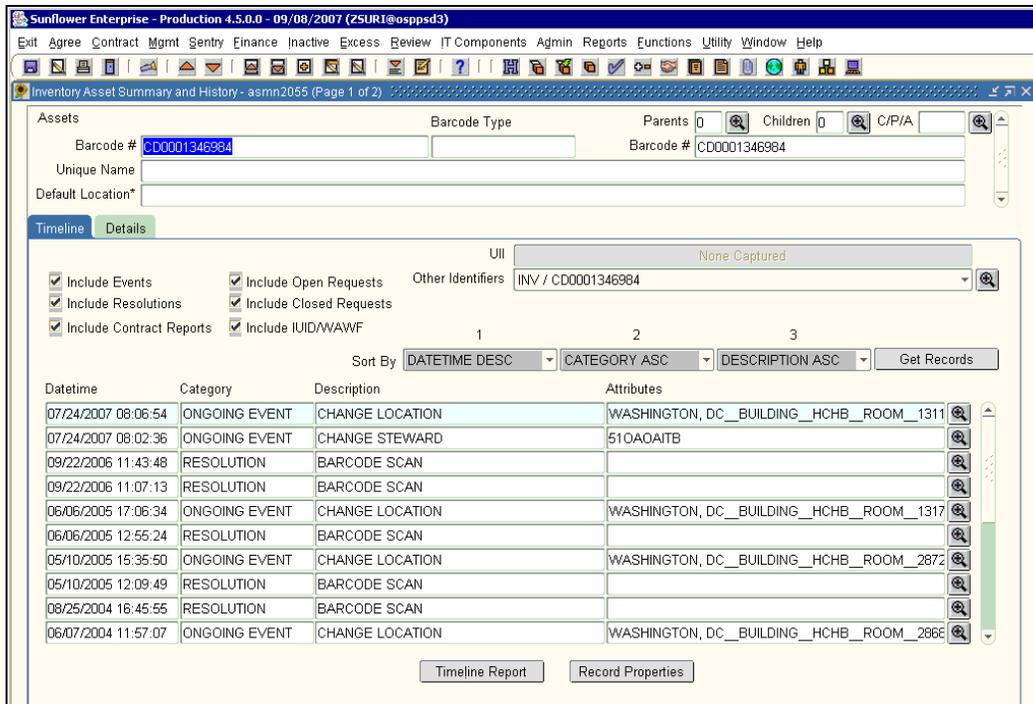
3. Use the **Lookup** (Details) icon to drill down to other associated forms.

goto Task#7

View Asset Timeline History

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SF 4.5



4. Select the **Find** icon from the toolbar to bring up the **Query Criteria** window.

Result: The **Query Criteria** window displays:

- Conduct a search using any one of the following criteria. You may choose one for a broad search or many for a narrower search:

Field	Description
Custodial Area	Enter your custodial code. This selection will automatically populate the Prop Custodian field.
Contact ID	Identifies the secondary Property Custodian for the asset. Select the Last Name from the list of values and then select a First name from the LOV. This will automatically populate the Secondary Custodian's ID in the Contact ID .
User	Select the Last Name from the list of values, and then select a First name from the LOV. This will automatically populate the User's badge number in the User field.
Location	The location of the asset (Site, Structure Level 1 and Structure Level 2).
Manufacturer	The manufacturer of the asset.
Model	The model of the asset.
Description	The official name of the asset.
Serial Number	The serial number of the asset.
Interest Type	Select Agreement, Excess, Financial, or Inventory.
Initial Event	The initial event of the asset.

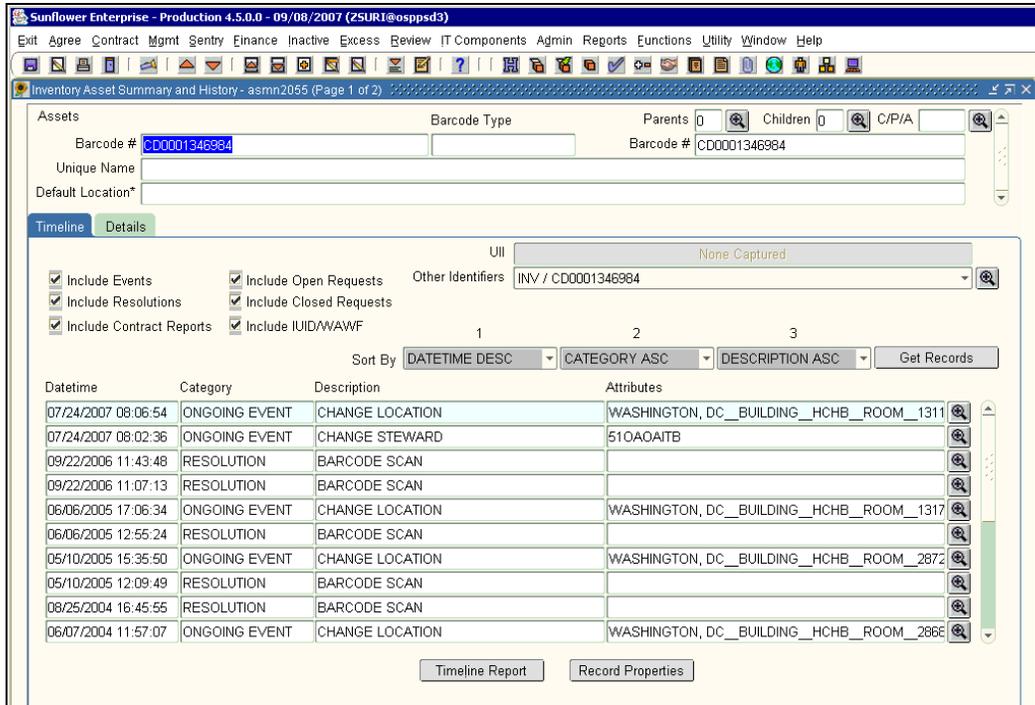
View Asset Timeline History

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SF 4.5

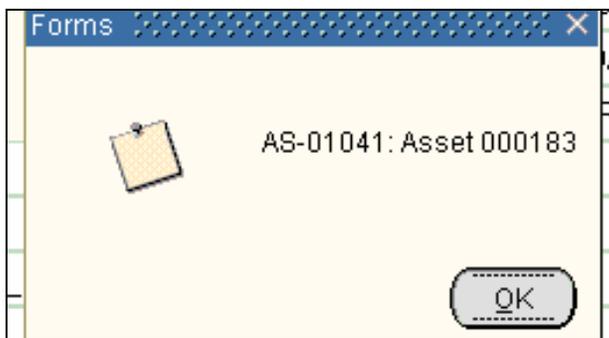
6. Select the **Find** icon from the toolbar once more.

Result: The asset information is populated to the **Inventory Asset and Summary History Timeline** window.



7. To view the timeline history of the next asset, select the **Next Record** button on the toolbar.

Result: You receive a message similar to the following:



8. Select the **OK** button.

Result: The next property record from the search criteria will display:

Sunflower Enterprise - Production 4.5.0.0 - 09/08/2007 (ZSUR1@osppsd3)

Exit Agree Contract Mgmt Entry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Inventory Asset Summary and History - asrm2055 (Page 1 of 2)

Assets Barcode Type Parents 0 Children 0 C/P/A C

Barcode # 000183 Barcode # 000183

Unique Name

Default Location*

Timeline Details

UII None Captured

Include Events
 Include Open Requests
 Other Identifiers INV / 000183

Include Resolutions
 Include Closed Requests

Include Contract Reports
 Include IUID/AWAF

Sort By 1 2 3

DATETIME DESC CATEGORY ASC DESCRIPTION ASC Get Records

Datetime	Category	Description	Attributes
05/11/2007 12:29:42	ONGOING EVENT	CHANGE USER	MATTHEWS LISE C CPPLCM
03/27/2007 12:20:33	ONGOING EVENT	CHANGE LOCATION	BOULDER, CO _BUILDING _TABLE MOUNTAIN MESA
03/16/2007 14:38:15	RESOLUTION	BARCODE SCAN	
05/18/2006 16:33:08	ONGOING EVENT	CHANGE LOCATION	BOULDER, CO _BUILDING _TABLE MOUNTAIN MESA
05/02/2006 12:09:40	ONGOING EVENT	CHANGE LOCATION	BOULDER, CO _BUILDING _RADIO _ROOM _T-22 _T
05/01/2006 11:06:27	RESOLUTION	BARCODE KEY	
04/28/2006 14:21:30	RESOLUTION	BARCODE KEY	
02/28/2005 12:06:35	ONGOING EVENT	CHANGE LOCATION	BOULDER, CO _BUILDING _RADIO _ROOM _2246
02/25/2005 10:45:52	ONGOING EVENT	CHANGE LOCATION	BOULDER, CO _BUILDING _1 _ROOM _2246
02/18/2005 11:28:22	RESOLUTION	BARCODE SCAN	

Timeline Report Record Properties

9. Continue scrolling through records as needed.

End of activity.



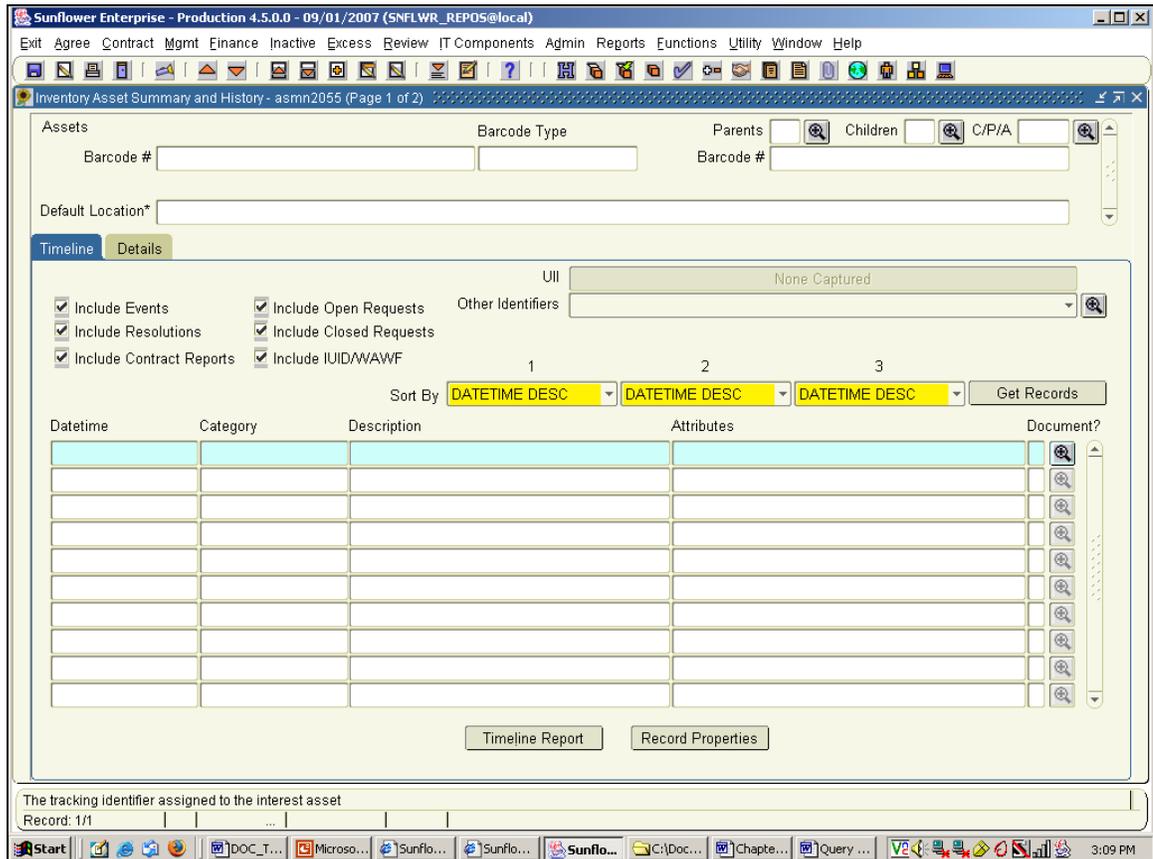
NAV: View Asset Details History

View Asset Details History

Inventory Clerk/ Inventory Manager

M > Mgmt > Inventory Asset Summary and History

Inventory Asset Summary and History



1. Select the **Details** tab.

Result: The Details history screen displays.

2. Select the **Include History** checkbox.

If you want to search by barcode number, goto task #3. Otherwise, goto task #6.

3. Enter the barcode number in the **Barcode #** field.
4. **Tab** out of the field.

Result: The details history autofills.

Sunflower Enterprise - Production 4.5.0.0 - 09/08/2007 (Z5URI@osppsd3)

Exit Agree Contract Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets Barcode Type Parents 0 Children 0 C/P/A

Barcode # CD0001346984 Barcode # CD0001346984

Unique Name

Default Location*

Timeline Details

Include history v

Manufacturer	DELL INC.	Model Number	PRECISION 340
Description	MICROCOMPUTER, DESKTOP, TOWER,	Model Name	PRECISION 340
Serial Number	39N5P11	Drawing No.	
Initial Event	PURCHASE	User Fields*	
Final Event		User Fields*	
Asset Value*	\$2,457.00 NOT CAPITALIZ	Acquisition Date	07/08/2002
Asset Condition		Responsibility Date	07/26/2002
Utilization Code	IN SERVICE	Effective Date	05/10/2005
Bureau or Region	OS	Expected Return Date	
Cust Area	510ASAMSS	Flags	S O
Property Contact		Activity Type	AGENCY OWNED
Current User		Property Accountability Office	510ASA
Location*	WASHINGTON, DC _BUILDING _HCHB _ROOM _2872	Property Custodian	COLEMAN BRANDI M CPP000
Document*			
User Fields*			
Global User Fields*			

Creator Information Interest Details

5. Use the **Lookup** (Details) icon to drill down to other associated forms.

Goto task #9

6. Select the **Find** icon from the toolbar to bring up the **Query Criteria** window.

Result: The **Query Criteria** window displays:

7. Conduct a search using any one of the following criteria. You may choose one for a broad search or many for a narrower search:

Field	Description
Custodial Area	Enter your custodial code. This selection will automatically populate the Prop Custodian field.
Contact ID	Identifies the secondary Property Custodian for the asset. Select the Last Name from the list of values and then select a First name from the LOV. This will automatically populate the Secondary Custodian's ID in the Contact ID .
User	Select the Last Name from the list of values, and then select a First name from the LOV. This will automatically populate the User's badge number in the User field.
Agreement Identifier	Select the type of agreement the asset is on.
Location	The location of the asset (Site, Structure Level 1 and Structure Level 2).
Manufacturer	The manufacturer of the asset.
Model	The model of the asset.
Description	The official name of the asset.
Serial Number	The serial number of the asset.

View Asset Details History

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SF 4.5

Interest Type	Select Agreement, Excess, Financial, or Inventory.
Initial Event	The initial event of the asset.

8. Select the **Find** icon from the toolbar once more.

Result: The asset information is populated to the **Inventory Asset and Summary History Details** window.

Screenshot of Sunflower Enterprise - Production 4.5.0.0 - 09/08/2007 (ZSURI@osppsd3) showing the 'Inventory Asset Summary and History' window. The window displays the following information:

- Assets: Barcode # CD0001346984, Barcode Type, Parents 0, Children 0, C/P/A
- Barcode # CD0001346984, Unique Name, Default Location*
- Timeline Details: Include history
- Manufacturer: DELL INC., Model Number: PRECISION 340
- Description: MICROCOMPUTER, DESKTOP, TOWER, Model Name: PRECISION 340
- Serial Number: 39N5P11, Drawing No.
- Initial Event: PURCHASE, User Fields*
- Final Event, User Fields*
- Asset Value*: \$2,457.00 [NOT CAPITALIZ], Acquisition Date: 07/08/2002, Responsibility Date: 07/26/2002
- Asset Condition, Effective Date: 05/10/2005, Expected Return Date
- Utilization Code: IN SERVICE, Flags: S O, Activity Type: AGENCY OWNED
- Bureau or Region: OS, Property Accountability Office: 51OASA
- Cust Area: 51OASAMSS, Property Custodian: COLEMAN BRANDI M CPP000
- Property Contact, Current User
- Location*: WASHINGTON, DC, BUILDING, HCHB, ROOM, 2872
- Document*, User Fields*, Global User Fields*

Buttons: Create Information, Interest Details

9. To view the details history of the asset, select the **Next Record** button on the toolbar, the **keyboard arrow keys**, or the **scrollbar**.

Result: When switching between assets, you receive a message similar to the following:

Screenshot of a 'Forms' dialog box showing the message: AS-01041: Asset 000183. The dialog box includes a clipboard icon and an OK button.

10. Select the **OK** button.

Result: The next property record from the search criteria will display:

The screenshot displays the Sunflower Enterprise software interface. The title bar reads "Sunflower Enterprise - Production 4.5.0.0 - 09/08/2007 (25URI@osppsd3)". The menu bar includes: Exit, Agree, Contract, Mgmt, Entry, Finance, Inactive, Excess, Review, IT Components, Admin, Reports, Functions, Utility, Window, Help. The main window title is "Inventory Asset Summary and History - asmn2055 (Page 1 of 2)".

At the top, there are fields for "Assets", "Barcode #", "Barcode Type", "Parents", "Children", and "C/P/A". The "Barcode #" field contains "000183".

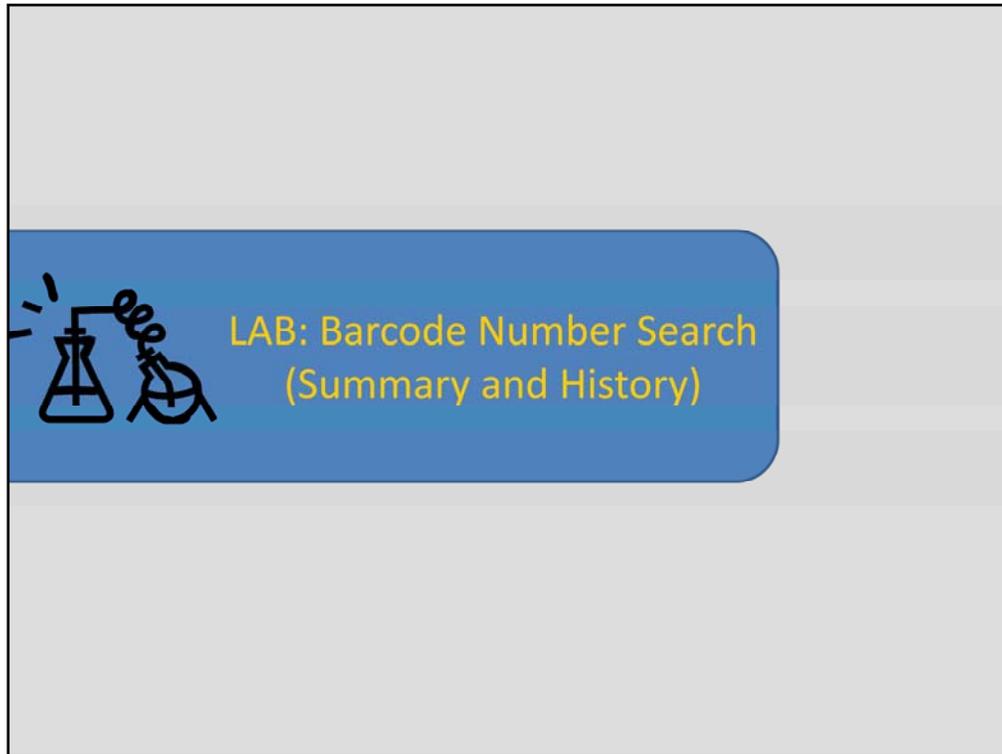
Below this is a "Timeline" section with a "Details" tab selected. A checkbox "Include history" is checked. The main area contains a grid of asset details:

Manufacturer	DELL INC.	Model Number	XPS-T450 DIMENSION
Description	MICROCOMPUTER, DESKTOP, TOWER	Model Name	DIMENSION
Serial Number	UXH2G	Drawing No.	
Initial Event	PURCHASE	User Fields*	
Final Event		User Fields*	
Asset Value*	\$2,462.00 NOT CAPITALIZ	Acquisition Date	04/01/1999
Asset Condition	4 USED - MAJOR REPAIRS	Effective Date	05/11/2007
Utilization Code	IN SERVICE	Flags	S 0
Bureau or Region	NTIA	Activity Type	AGENCY OWNED
Cust Area	61NTIA_01	Property Accountability Office	61NTIA_
Property Contact		Property Custodian	MATTHEWS LISE C CPPLCM
Current User	MATTHEWS LISE C CPPLCM		
Location*	BOULDER, CO _BUILDING_ TABLE MOUNTAIN MESA _ROOM_ T 22		
Document*			
User Fields*			
Global User Fields*			

At the bottom of the details section are two buttons: "Creatgr Information" and "Interest Details".

11. Continue scrolling through records as needed.

End of activity.



Search the timeline history for asset with the following barcode number:
CD0001346984

Search the summary and history information for the asset with the barcode number:
CD0001346984

Reports

To view history information in a report format, one of three reports may be used:

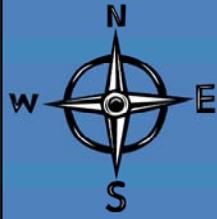
- Inventory Asset Timeline Report
- Inventory Asset History
- Inventory Assets (Global Information)

These reports may be run to view the history and details of property records. Since reports display real time data, as soon as a record is changed, the new information is reflected in the report.

- Inventory Asset Timeline – displays timeline activities by asset identifier
- Inventory Asset History – Shows the detailed changes and who made them
- Inventory Assets (Global Information) – Shows detailed and summary information of assets

If you have trouble displaying reports you may need to disable your popup blocker or enable Sunflower as a pop-up execution. One method to disable your pop-up blocker is listed below. Always check with your IT support.

1. On the Internet Explorer menu bar, select **Tools>Internet Options**.
2. Select the **Privacy** tab.
3. Uncheck **Block the pop-ups** checkbox.
4. Select the **Apply** button.
5. Select the **OK** button.



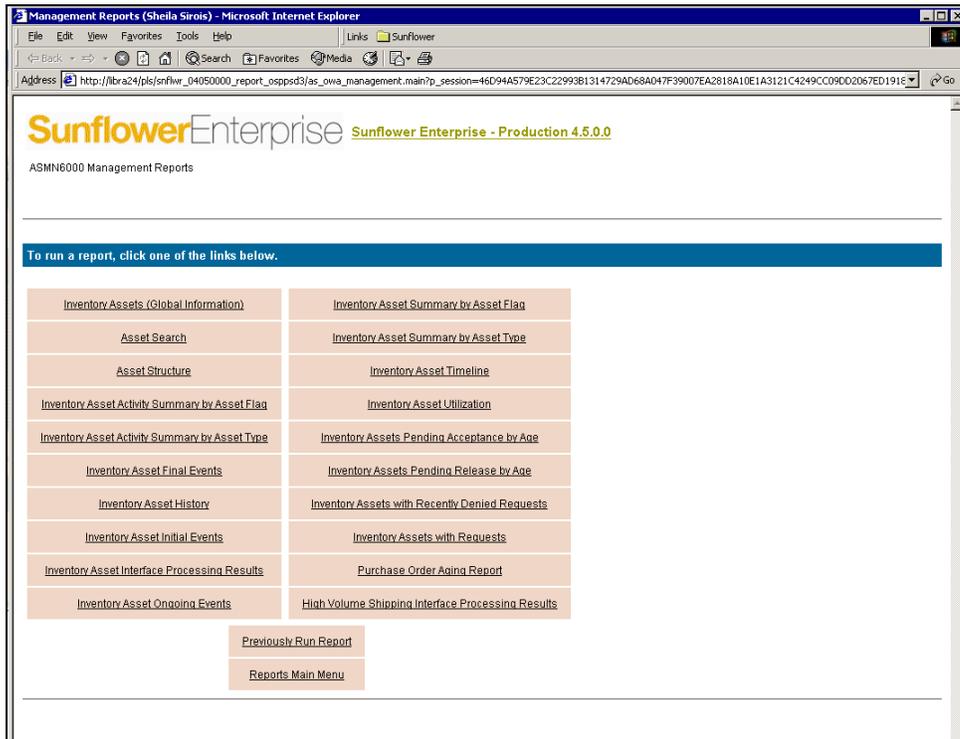
NAV: View Inventory Asset
Timeline Report

View Inventory Asset Timeline Report

Inventory Clerk/ Inventory Manager

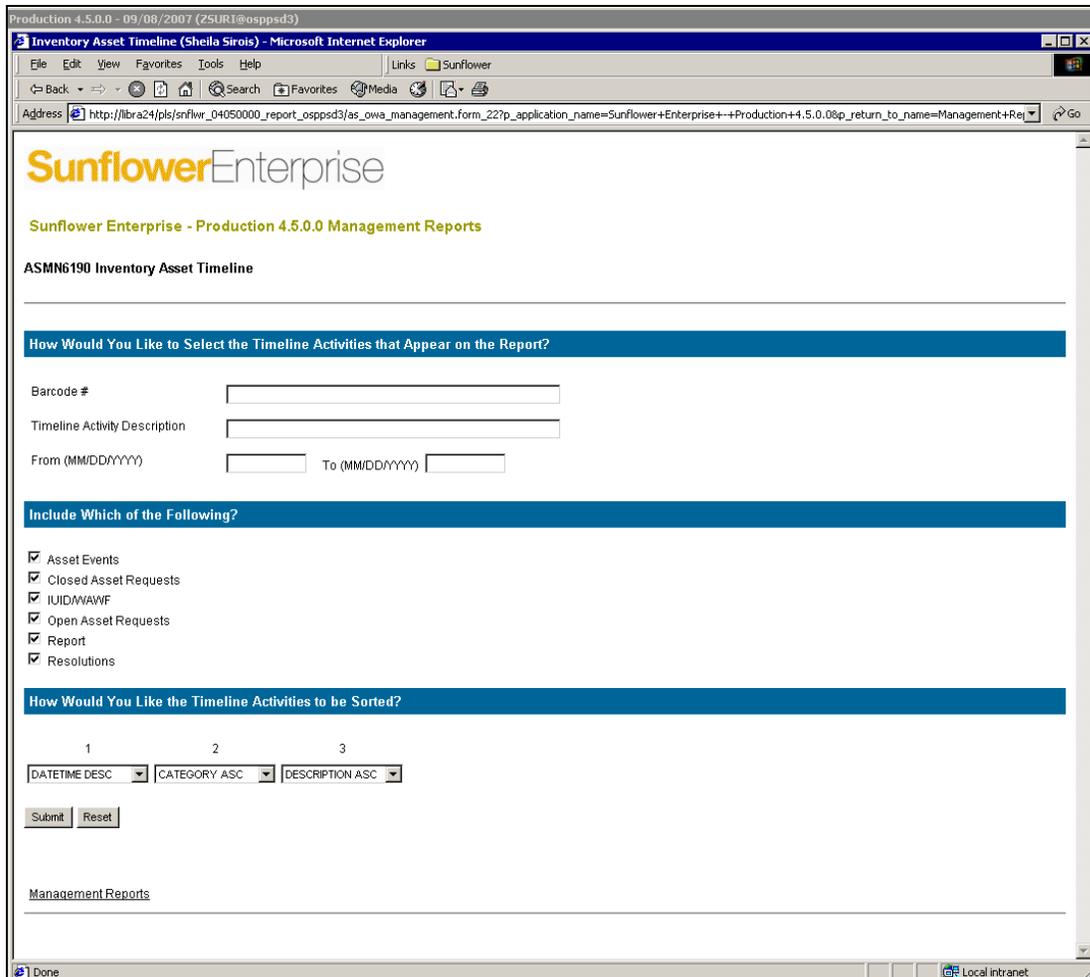
M > Mgmt > Management Reports

Management Reports



1. Select the **Inventory Asset Timeline** report link.

Result: The report criteria screen displays.

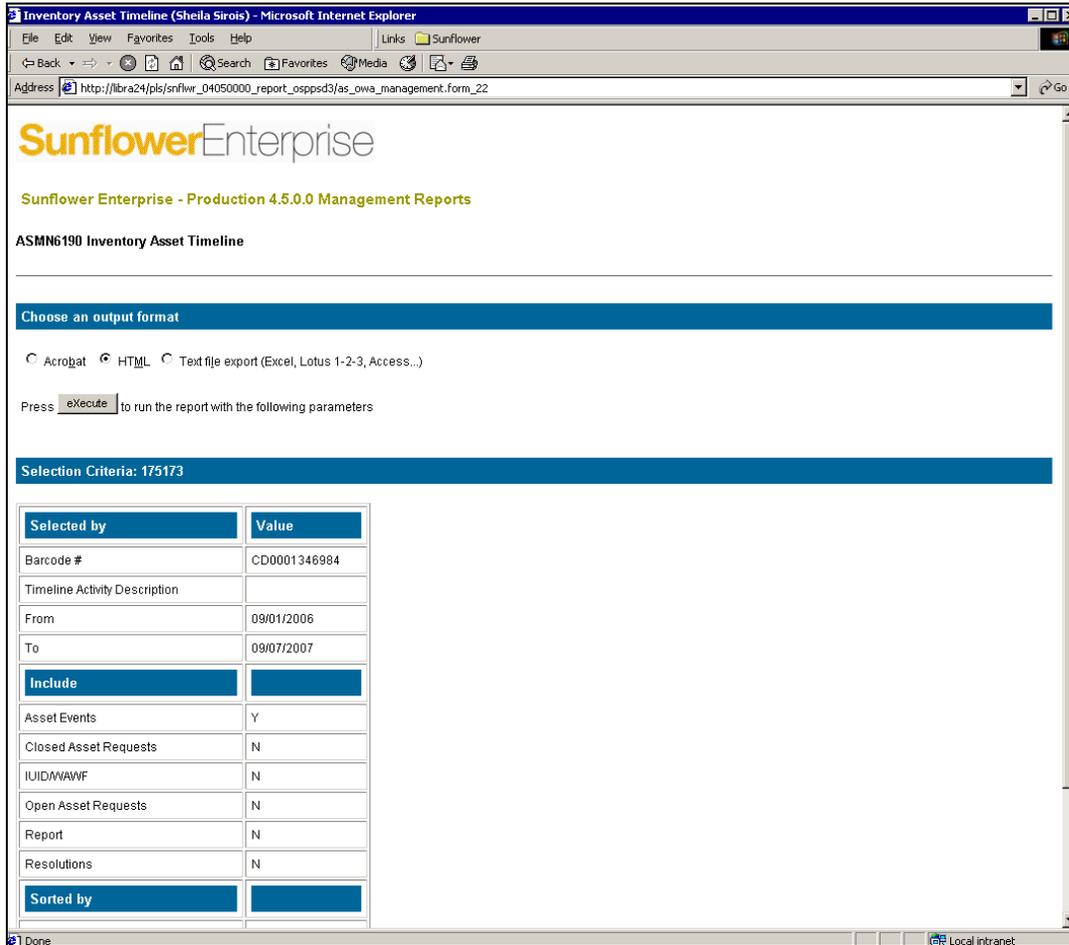


2. Enter the barcode number in the **Barcode #** field.
3. **Tab** out of the field.
4. Enter the Timeline Activity Description in the **Timeline Activity Description** field.
5. **Tab** out of the field.
6. Enter the date range to search using the **From (MM/DD/YYYY)** and the **To (MM/DD/YYYY)** fields.
7. Check the appropriate fields in the **Include Which of the Following?** section.

Note: At least one field must be checked.

8. Change the sort criteria as needed in the **How Would You Like the Timeline Activities to be Sorted?** section.
9. Select the **Submit** icon.

Result: A confirmation and output page displays.



10. Review the criteria and select **Acrobat** and then select the **eXecute** button.

Note: You may select the back button to change any criteria selected.

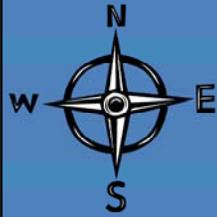
Result: The Inventory Asset Timeline report displays.

Barcode # : INV CD0001346984

Datetime	Category Type	Description	Attributes	Created By	Recorded By
07/24/2007 08:06:54	ONGOING EVENT	CHANGE LOCATION	New Location:WASHINGTON, DC_BUILDING__RCMB__ROOM__1311	COLEMAN JERI CPFJDC	COLEMAN JERI CPFJDC
07/24/2007 08:02:36	ONGOING EVENT	CHANGE STEWARD	New steward:SILOGAITB	COLEMAN JERI CPFJDC	COLEMAN JERI CPFJDC

11. Use the scrollbar to scroll through the report.

End of activity.



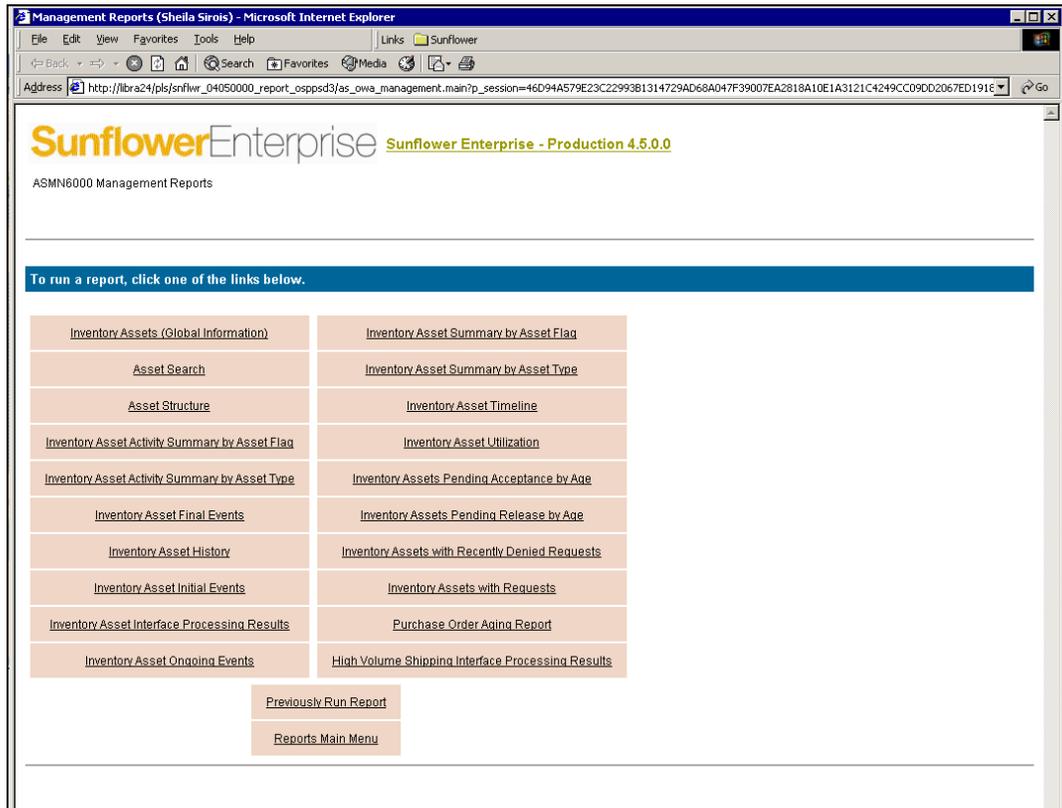
NAV: View Inventory Asset
History Report

View Inventory Asset History Report

Inventory Clerk/ Inventory Manager

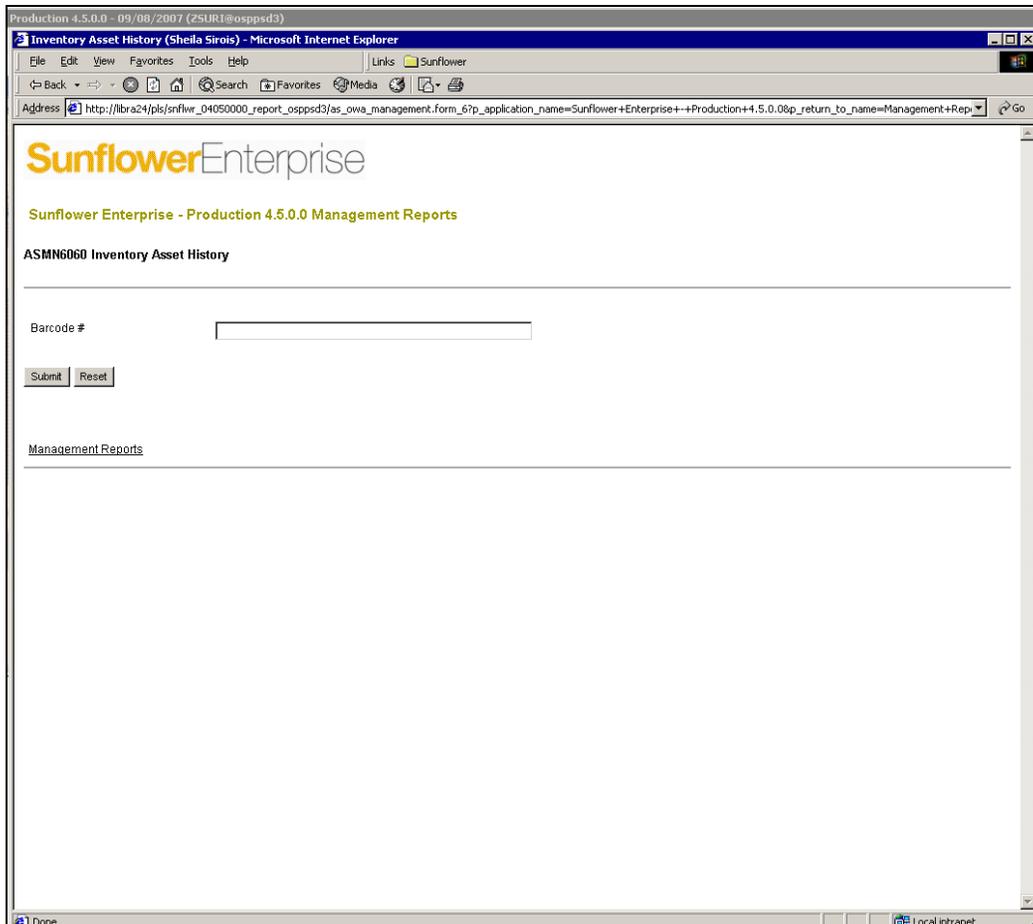
M > Mgmt > Management Reports

Management Reports



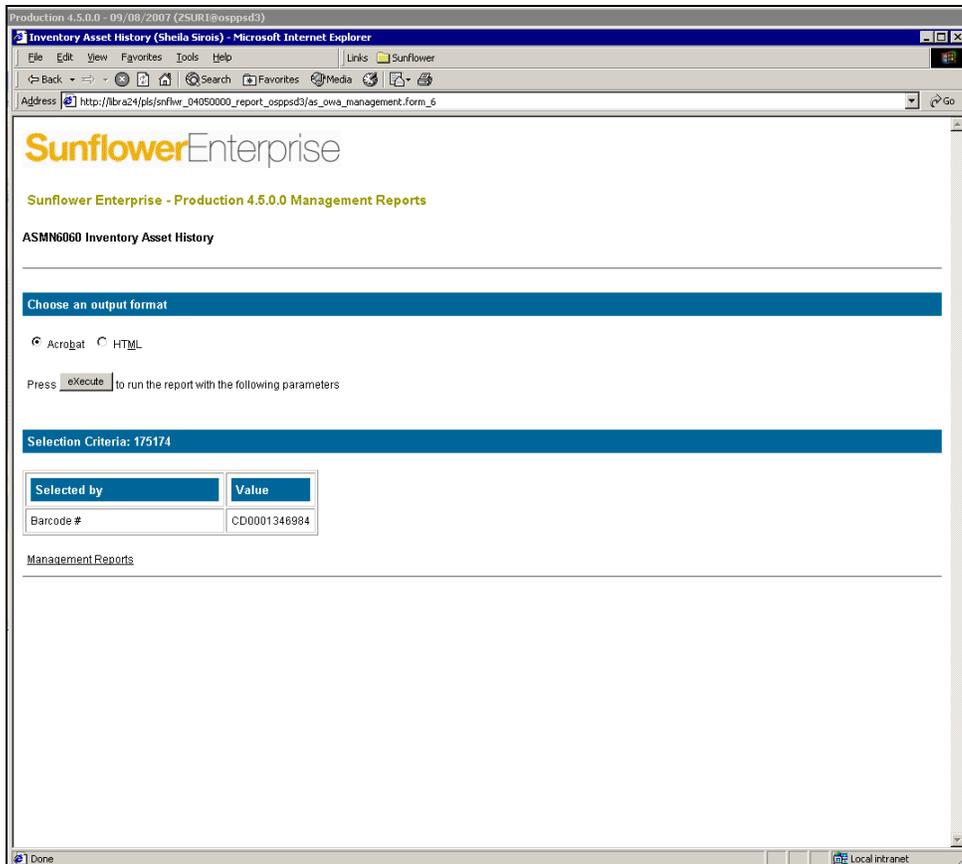
1. Select the **Inventory Asset History** report link.

Result: The report criteria screen displays.



2. Enter the barcode number in the **Barcode #** field.
3. **Tab** out of the field.
4. Select the **Submit** icon.

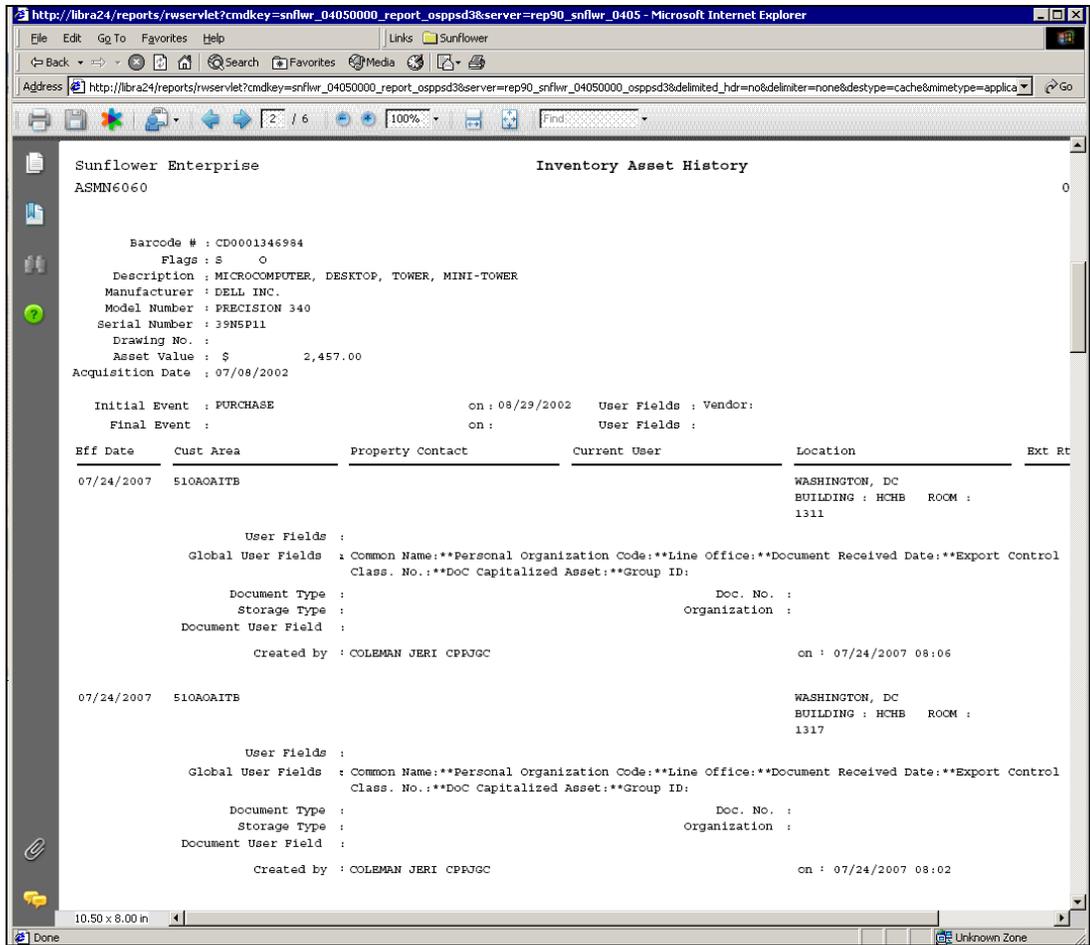
Result: A confirmation and output page displays.



5. Select the **Acrobat** radio button, review the criteria and select **Execute**.

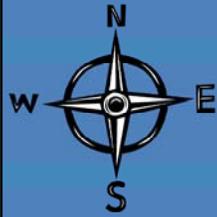
Note: You may select the back button to change any criteria selected.

Result: The Inventory Asset History report displays.



6. Use the scrollbar to scroll through the report.

End of activity.



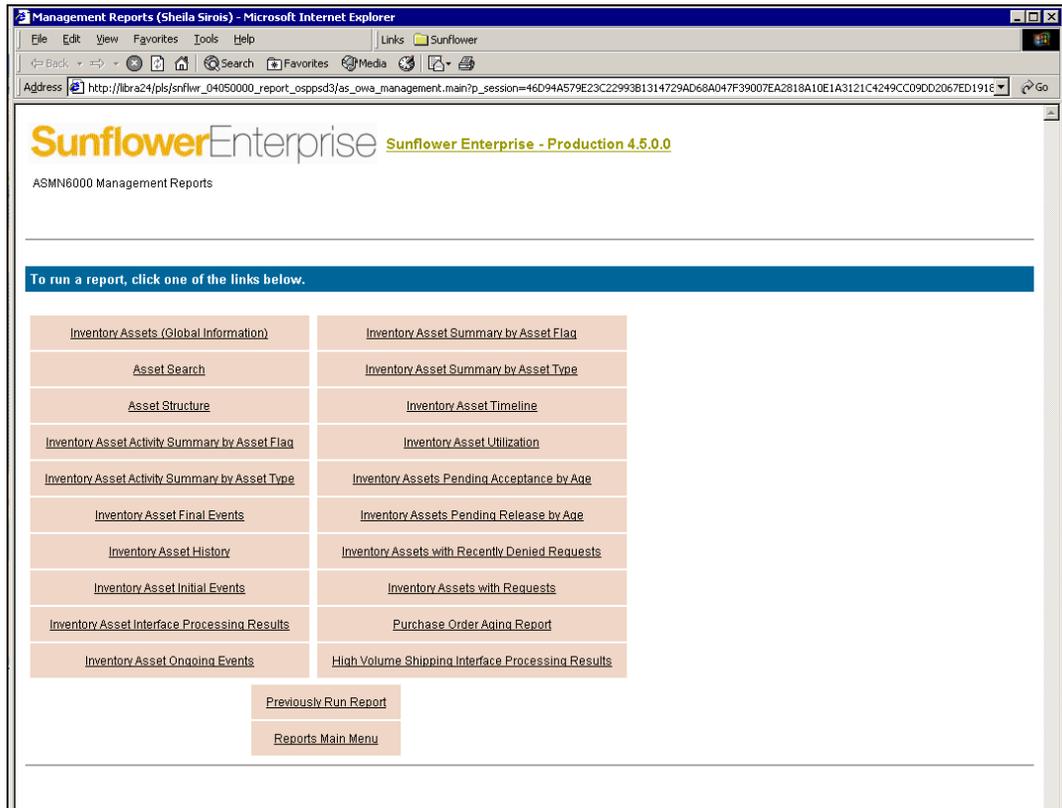
NAV: View Inventory Asset
Global Information Report

View Inventory Asset (Global Information) Report

Inventory Clerk/ Inventory Manager

M > Mgmt > Management Reports

Management Reports



1. Select the **Inventory Asset (Global Information)** report link.

Result: The report criteria screen displays.

2. Enter the search criteria in the fields provided.

Note: The more information entered, the more specific your search will be.

3. **Tab** out of the fields.

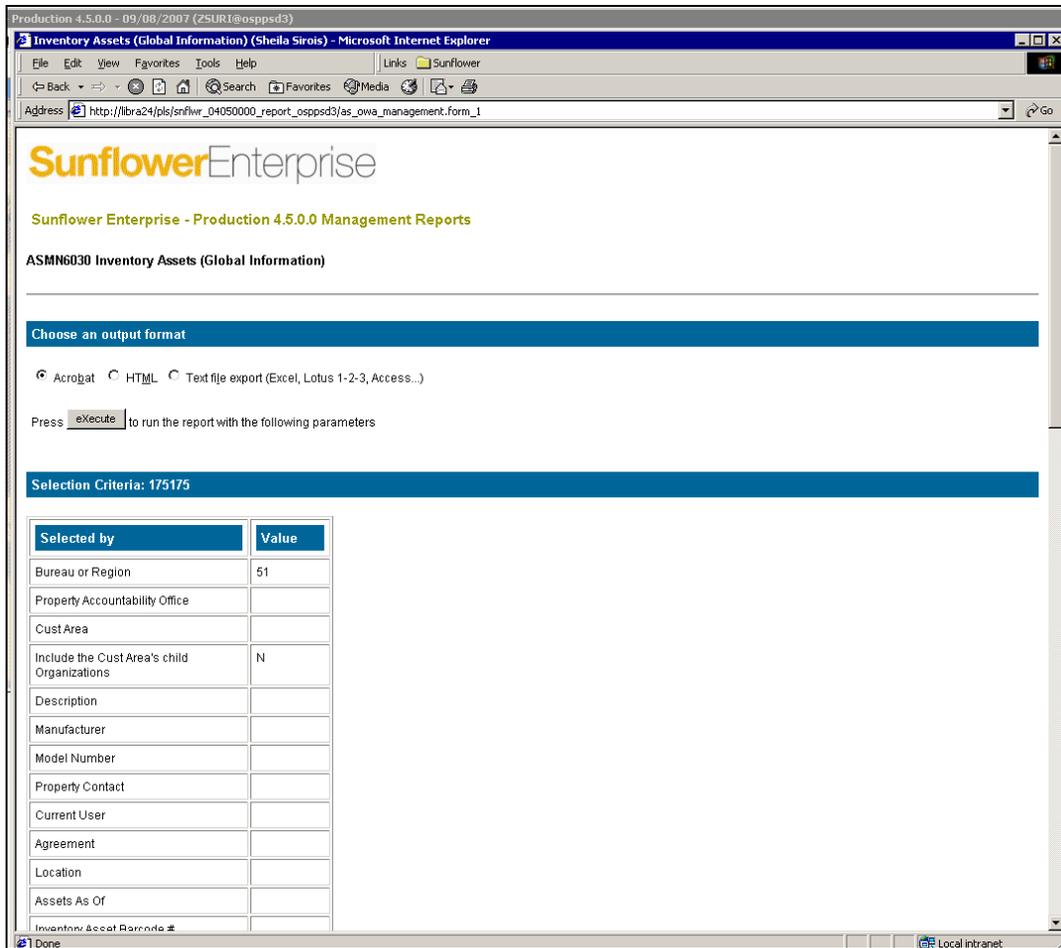
4. Check the appropriate fields in the **Include Which of the Following?** section.

Note: At least one field must be checked.

5. Change the sort criteria as needed in the **How Would You Like the Timeline Activities to be Sorted?** section.

6. Select the **Submit** icon.

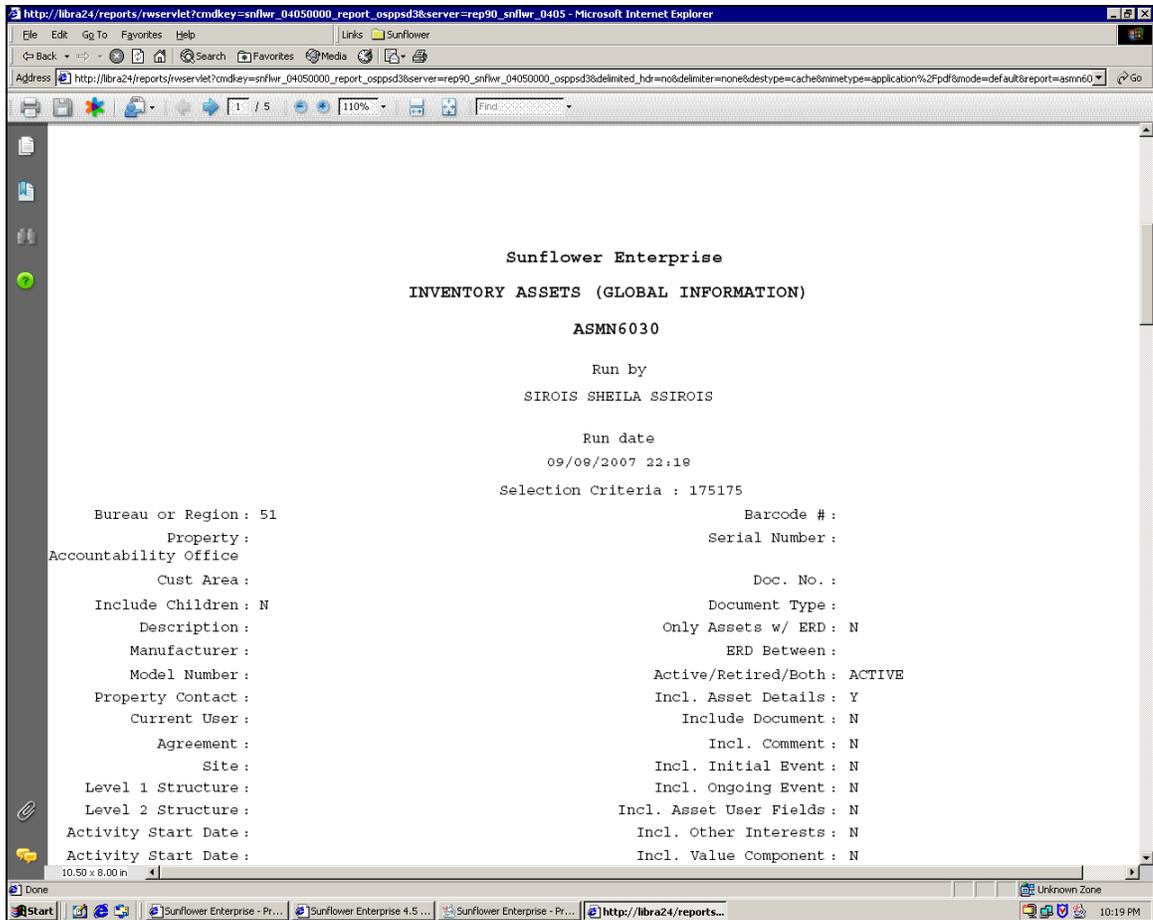
Result: A confirmation and output page displays.



7. Select the **Acrobat** radio button.
8. Review the criteria and select **eXecute**.

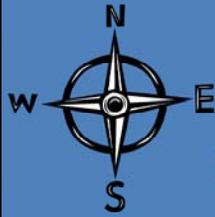
Note: You may select the back button to change any criteria selected.

Result: The Inventory Asset (Global Information) report displays.



9. Use the scrollbar to scroll through the report.

End of activity.



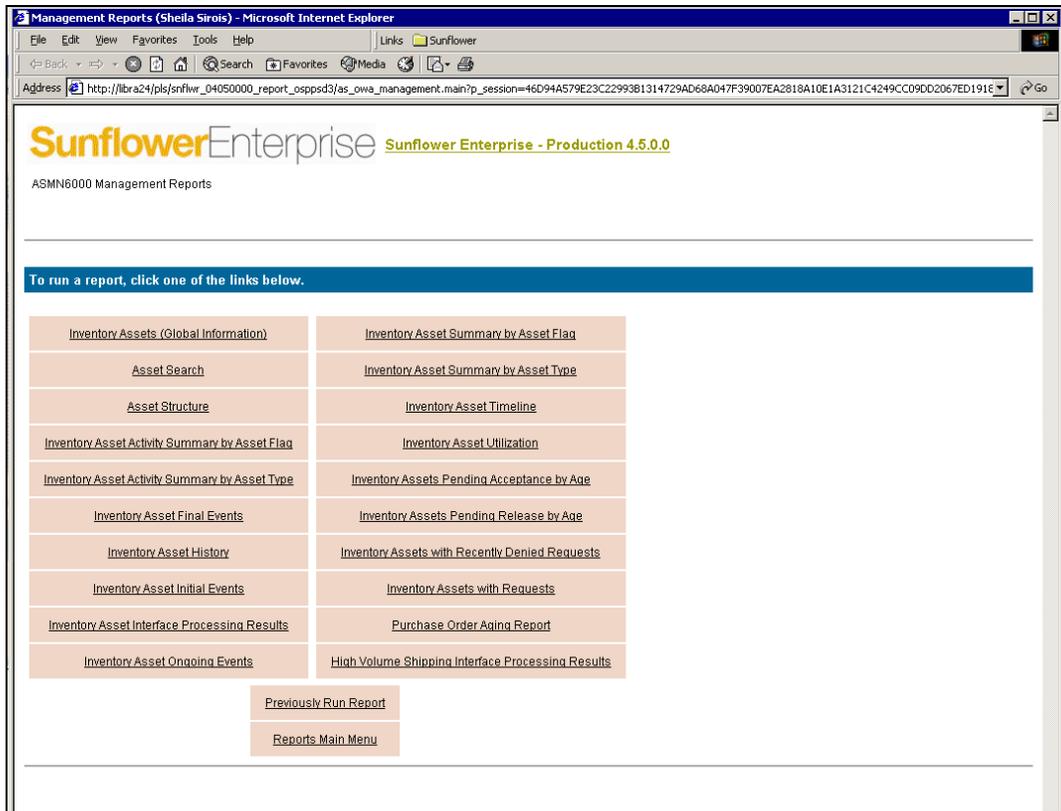
NAV: View Inventory Asset
Global Information Report
Excluding Commodity Assets

View Inventory Asset (Global Information) Report Excluding Commodity Assets

Inventory Clerk/ Inventory Manager

M > Mgmt > Management Reports

Management Reports



1. Select the **Inventory Asset (Global Information)** report link.

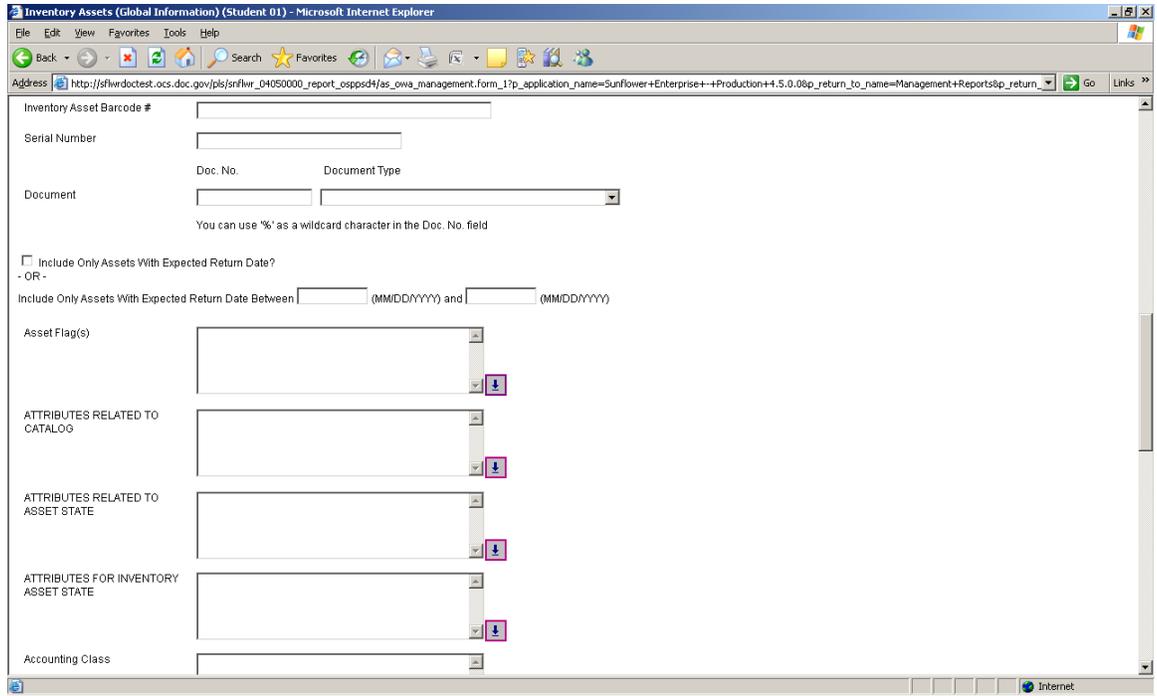
Result: The report criteria screen displays.

2. Enter the search criteria in the fields provided.

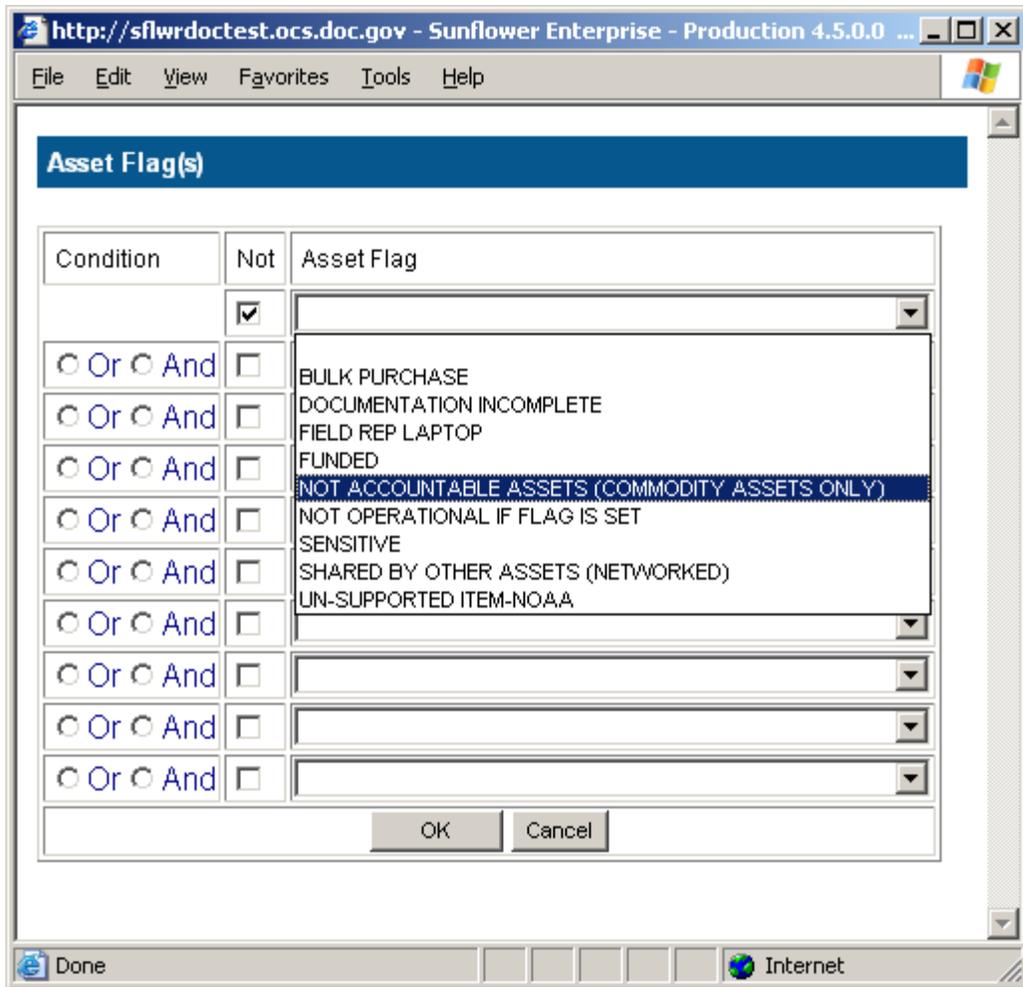
Note: The more information entered, the more specific your search will be.

3. **Tab** out of the fields.

4. To exclude non-accountable (commodity) assets, scroll down in the report criteria to the **Asset Flag(s)** box.



5. Click the drop-down box to open the **Asset Flag(s)** selection criteria.



6. Click the **Not** box and the drop-down list to select the **NOT ACCOUNTABLE ASSETS (COMMODITY ASSETS ONLY)**
7. Click **OK** to close

Results: The asset flag selection appears in the report criteria

Inventory Assets (Global Information) (Student 01) - Microsoft Internet Explorer

Address: http://sflwrdoctest.ocs.doc.gov/pls/sflwr_04050000_report_csspd4/as_owa_management_form_1?p_application_name=Sunflower+Enterprise+Production+4.5.0.0&p_return_to_name=Management+Reports&p_return_

Inventory Asset Barcode #

Serial Number

Doc. No. Document Type

Document

You can use '%' as a wildcard character in the Doc. No. field

Include Only Assets With Expected Return Date?
- OR -

Include Only Assets With Expected Return Date Between (MMDD/YYYY) and (MMDD/YYYY)

Asset Flag(s)

ATTRIBUTES RELATED TO CATALOG

ATTRIBUTES RELATED TO ASSET STATE

ATTRIBUTES FOR INVENTORY ASSET STATE

Accounting Class

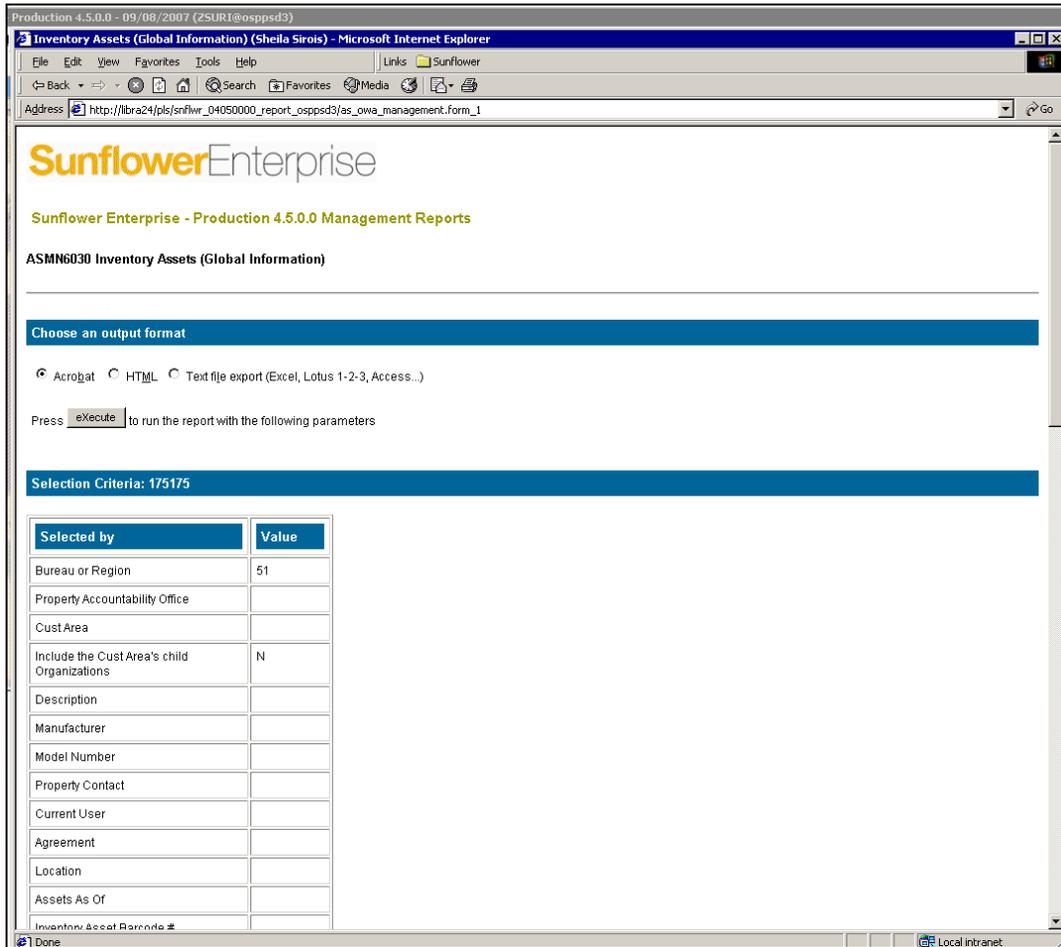
8. Check the appropriate fields in the **Include Which of the Following?** section.

Note: At least one field must be checked.

9. Change the sort criteria as needed in the **How Would You Like the Timeline Activities to be Sorted?** section.

10. Select the **Submit** icon.

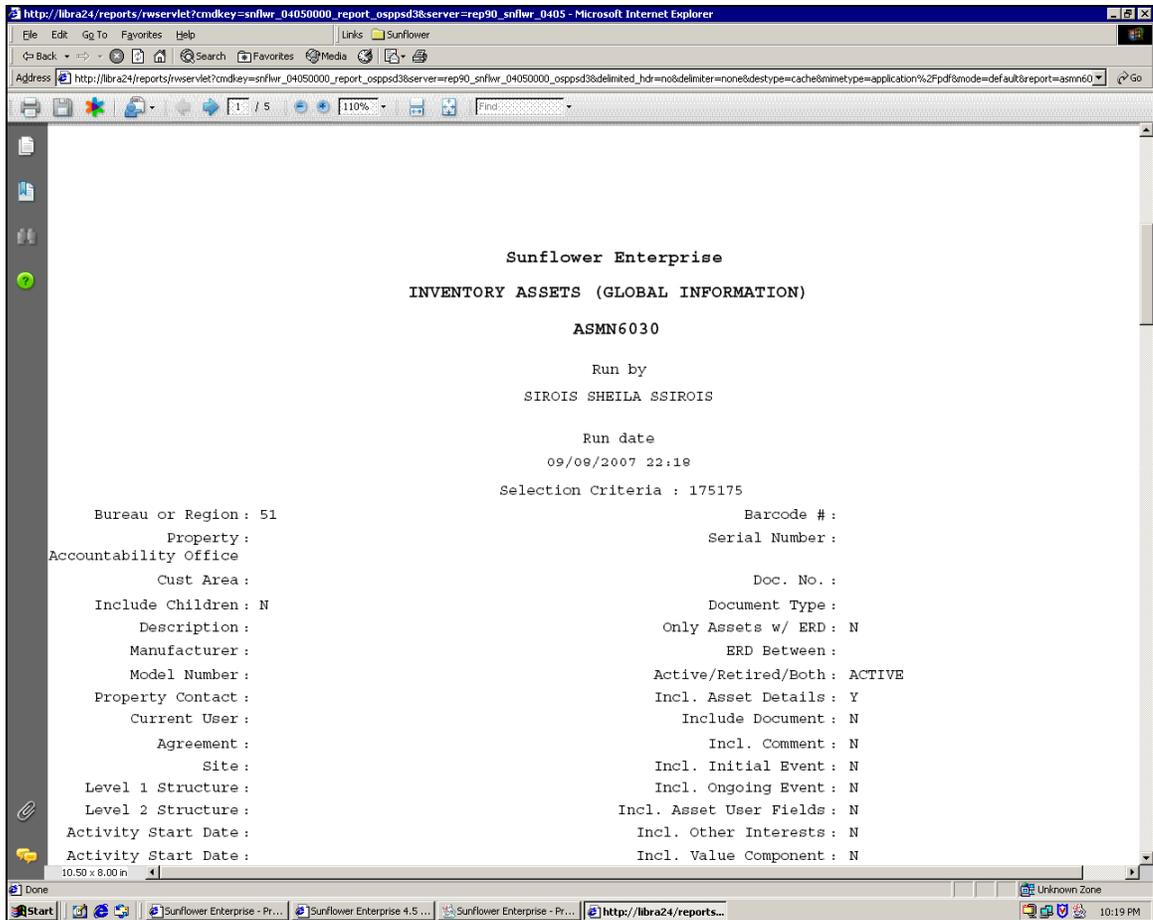
Result: A confirmation and output page displays.



11. Select the **Acrobat** radio button.
12. Review the criteria and select **eExecute**.

Note: You may select the back button to change any criteria selected.

Result: The Inventory Asset (Global Information) report displays.



13. Use the scrollbar to scroll through the report.

End of activity.



To run the reports use the following information:

- **Inventory Asset Timeline Report**
 - Use Barcode Number: CD0001346984
- **Inventory Asset History Report**
 - Use Barcode Number: CD0001346984
- **Inventory Assets (Global Information) Report**
 - Use Bureau: 55 (ITA)

Lesson Summary

- You should now be able to:
 - Perform a quick search using the Maintain Inventory Assets screen
 - Perform a quick search using the Query Criteria screen
 - View the current status of a property record
 - View the timeline details of a property record
 - Perform a barcode number search to view the entire history of a property record
 - View the creator information of a property record
 - View the property record's Catalog information
 - Run reports listing the history of property records

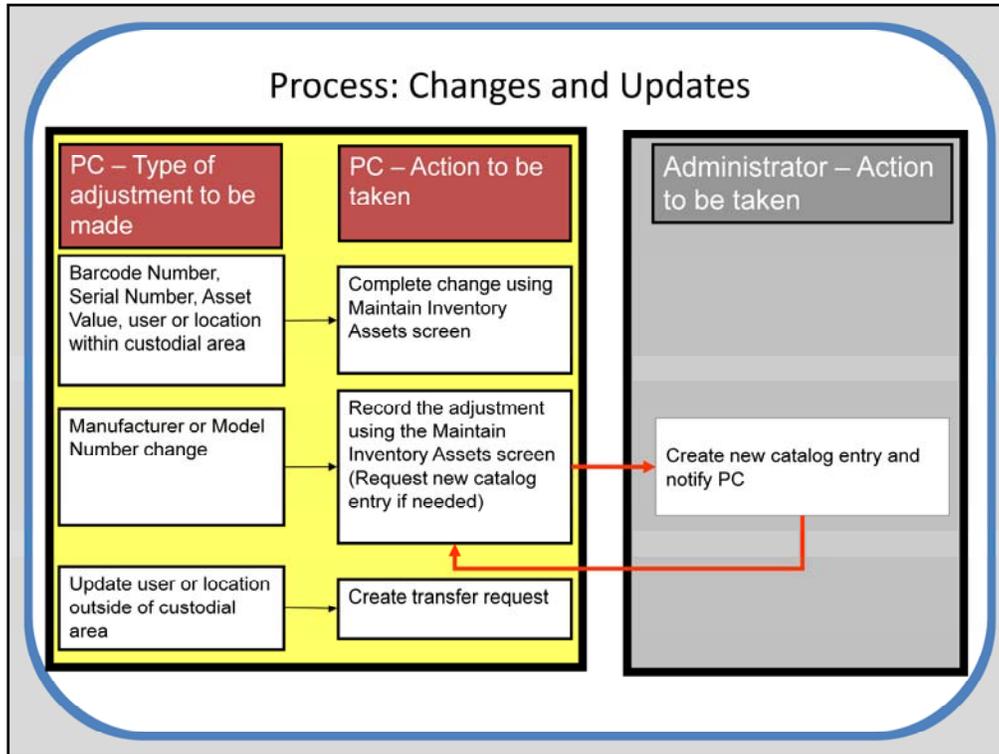


Chapter 5: Changes and Updates

Sunflower Assets 4.5

Lesson Objectives

- After this lesson you should be able to:
 - Summarize the steps used to update the property record
 - Update Serial Number, Manufacturer, Model, Barcode number
 - Update Contact ID, User, and Location within Custodial Area
 - Update the Asset Value



Depending upon the adjustment the property record needs, the PC may make the changes directly or may have to request a new catalog entry to be made.

- Barcode number changes should only be made if entered incorrectly or if an asset is being retagged.
- Any manufacturer, model number, and serial number changes require supporting documentation to prove the necessity of the change. These should only be changed if they were initially entered incorrectly.
- Changes and Updates are made using the **Maintain Inventory Assets** screen.
- Request a new catalog entry from the administrator. The new entry must be created before the manufacturer or model may be changed.
- To make updates to the user or location within your custodial area use the Maintain Inventory Assets screen.
- To make updates to the user or location outside of your custodial area follow the transfer process (see Chapter 7 Transfer Assets).

Maintain Inventory Assets Screen

The screenshot shows the 'Maintain Inventory Assets' screen in Sunflower Enterprise. The form contains the following fields and values:

- Barcode #:** CC0001346984 (highlighted with callout 1)
- Catalog Information:**
 - Manufacturer: DELL INC (highlighted with callout 2)
 - Model Number: 1150 INSPIRON
 - Description: LAPTOP COMPUTER
 - Serial Number: 3296P11
- Asset Value:** \$2,457.00 (highlighted with callout 3)
- Custodian, User, and Location:**
 - Contact ID: [Empty]
 - User: [Empty]
 - Location: WASHINGTON, DC_BUILDING_1110_ROOM_100C23 (highlighted with callout 4)
- Action Buttons:** Comment / Picture / Attachment (highlighted with callout 5)

PCs can make changes to the property record. To update barcode number, manufacturer, model, serial number, asset value, user in custodial area or location in custodial area simply enter the **Maintain Inventory Assets** screen.

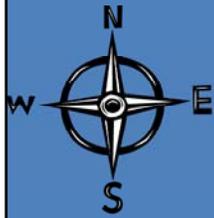
Area 1 Enter the barcode number of the asset in the **Barcode Number** field, then **Tab**.
Result: The remaining asset information autofills.

Area 2 Make the required changes for **Catalog information** in this field.

Area 3 Make the required changes for **Asset Value** in this area.

Area 4 Make the required changes for **Custodian, User, and Location** in this area. If these fall outside of your custodial area, follow the transfer process. Note that if you are accepting a transfer from another Bureau or PAO, you **MUST** update these fields.

Area 5 Use the **Comment / Picture / Attachment** button to attach any supporting documentation for higher level authorities or auditors. If no documentation can be attached, enter in the Comments field where the supporting hard copy documentation can be found.



NAV: Update Property Records

Update a Property Record

Inventory Clerk/ Inventory Manager

M > Mgmt > Maintain Inventory Assets

Maintain Inventory Assets

Inventory Assets

Barcode # Barcode Type Existing interest asset Type Barcode # Released?

Default Location* Copy to Location?

Catalog Identifier* Commodity Asset Parents Children C/P/A

Manufacturer Model Number

Description Model Name

Serial Number Drawing No.

Initial Event User Fields*

Asset Value* Acquisition Date Responsibility Date

Asset Condition Effective Date Expected Return Date

Utilization Code Flags* Activity Type

Bureau or Region Property Accountability Office

Cust Area Accepted? Property Custodian

Contact ID Last Name* First Mid

User Last Name* First Mid

Location*

Document*

User Fields*

Global User Fields*

Page 2 Commodity Comment / Picture / Attachment Re-Request

The tracking identifier assigned to the interest asset
Record: 1/1

1. Enter the barcode number of the item to be updated in the **Barcode Number** field and **Tab**.

Result: The remainder of the property record auto-populates.

Screenshot of Sunflower Enterprise - Production 4.5.0.0 - 09/08/2007 (25UR1@osppsd3) showing the 'Inventory Assets' form. The form includes fields for Barcode #, Unique Name, Default Location, Catalog Identifier, Manufacturer, Description, Serial Number, Initial Event, Asset Value, Asset Condition, Utilization Code, Bureau or Region, Cust Area, Contact ID, User, Location, Document, and various dates and flags. The 'Barcode #' field is highlighted with a blue selection box.

2. Update any necessary fields.

Field	Description
Barcode #	Enter the new Barcode Number for the asset.
Manufacturer	Enter the new name of the manufacturer of the asset. If a list of values appears, select the applicable standard manufacturer name from the list.
Model Number	Enter the new model number for the asset. If a list of values appears on the screen, select the applicable standard model number from the screen. Once you Tab , the Catalog Number and Official Name fields will automatically populate (based on the Manufacturer and Model Number combination.)
Serial Number	Enter the serial number of the asset, if known. Otherwise leave it blank .
Contact ID	Update only if in your custodial area.
User	Update only if in your custodial area.
Location	Update only if in your custodial area.

Note: To update complex fields such as **Location**, remember to double click to launch the fields, and **Save** the information you've entered.

Remember: You may only make changes to the Bureau or Region, Custodial Area, Contact ID, User and Location if they fall within your Custodial Area. For changes outside the Custodial area, you will need to complete a transfer.

3. Select the **Save** button from the toolbar to save the record.

Result: The property record is updated with the new information (in the example below, the **Model Number** and **Location** fields have been modified.)

Sunflower Enterprise - Production 4.5.0.0 - 09/08/2007 (ZSURI@ospssd3)

Exit Agree Contract Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

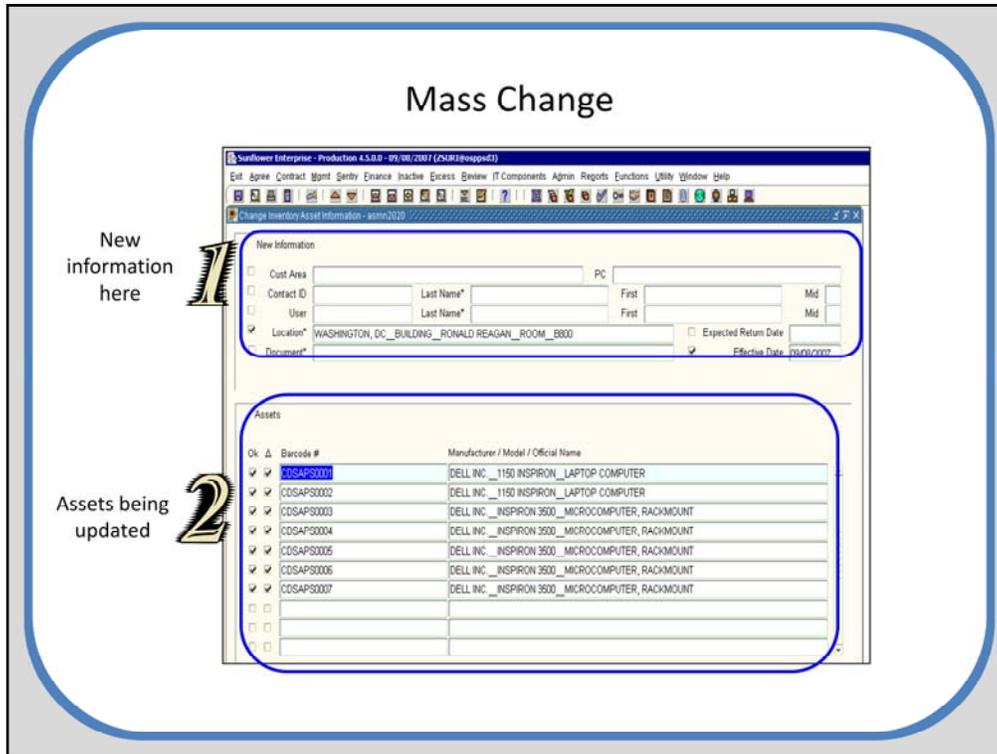
Barcode #	CD0001346984	Barcode Type	<input type="checkbox"/>	Existing interest asset	<input type="checkbox"/>	Type	Barcode #	Released?	<input type="checkbox"/> Y
Unique Name									
Default Location*									
Catalog Identifier*	134663	<input type="checkbox"/> Commodity Asset	Parents	<input type="checkbox"/>	Children	<input type="checkbox"/>	C/P/A	<input type="checkbox"/>	
Manufacturer	DELL INC.	Model Number	1150 INSPIRON						
Description	LAPTOP COMPUTER	Model Name	INSPIRON						
Serial Number	39N5P11	Drawing No.							
Initial Event	PURCHASE								
Asset Value*	\$2,457.00	Acquisition Date	07/08/2002		Responsibility Date	07/26/2002			
Asset Condition		Effective Date	09/08/2007		Expected Return Date				
Utilization Code	IN SERVICE	Flags*	S	<input type="checkbox"/> O	Activity Type	AGENCY OWNED			
Bureau or Region	OS	Property Accountability Office	51OASA						
Cust Area	51OAOAITB	Accepted?	<input checked="" type="checkbox"/> Y		Prop Custodian				
Contact ID		Last Name*			First			Mid	<input type="checkbox"/>
User		Last Name*			First			Mid	<input type="checkbox"/>
Location*	WASHINGTON, DC _BUILDING_ 1110 _ROOM_ 100C23								
Document*									
User Fields*									
Global User Fields*									

Page 2 Commodity Comment / Picture / Attachment Re-Request

End of activity.



Update the Model Name for the Laptop that you created with Barcode #: CD01MMDDYYXX (where MM=Month, DD=Day, YY=Year, and XX=your student number) to **Inspiron 3500**.

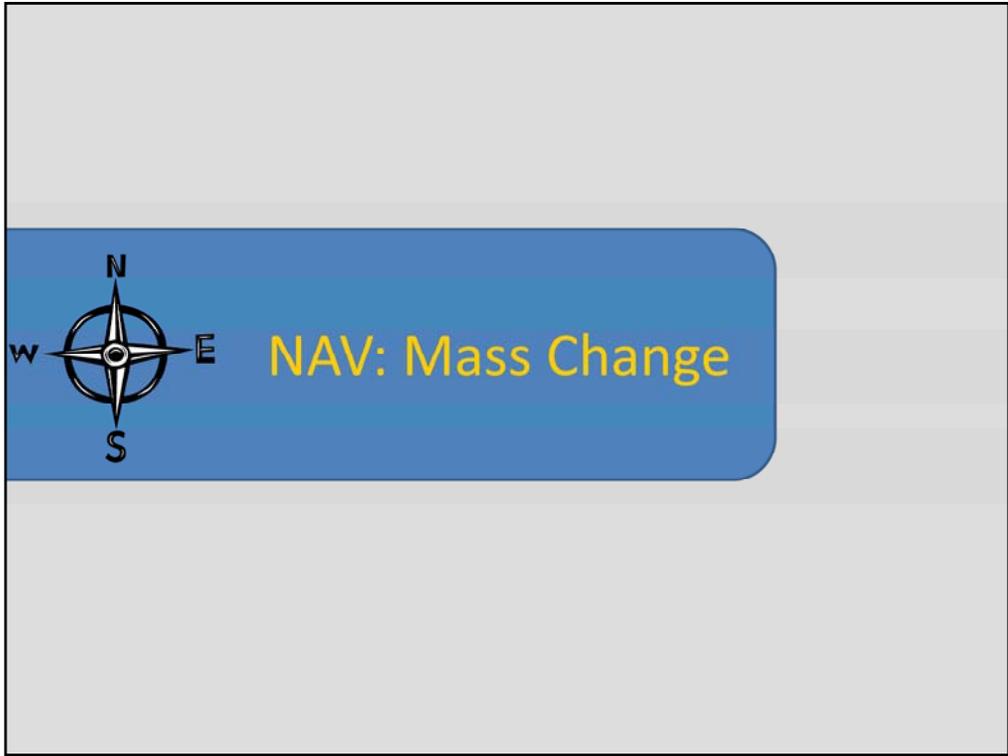


To make the same changes to more than one asset at a time, use the **Change Inventory Asset Information** screen (e.g. all assets are being changed from one location to another within your custodial area).

All changes will apply to the assets listed and all the updates must fall within your custodial area.

Area 1 Enter the new information in this section. You may update the Custodial Area, Contact ID, User, and Location here.

Area 2 List all assets to which to apply the changes listed in area 1.



Mass Change

The purpose of this document is to explain how to update several assets of a Custodial Area with the same asset information (e.g., Contact ID, User, and Location.)

Inventory Clerk / Inventory Manager
 M > Mgmt > Change Inventory Asset Information
 Change Inventory Asset Information

1. Update the following information, as needed, with the new asset information.

Field	Description
Cust Area	The number of the new custodial area
Contact ID	The name of the new secondary custodian
User	The new user
Location	The new location

2. Place the cursor in the **Barcode Number** field.

If you know the barcode numbers of the assets you wish to update , goto task #3. Otherwise, goto task#4.

3. Enter the barcode numbers of the assets you will be updating.

Goto task #7

4. Select the **Find** button from the toolbar.

Result: You are taken to the Query Criteria screen.

Screenshot of the Sunflower Enterprise - Production 4.5.0.0 - 09/01/2007 (SNFLWR_REPOS@local) Query Criteria screen. The window title is "Query Criteria - asut0050". The interface includes a menu bar (Action, Edit, Query, Block, Record, Field, Lookup, Help, Window) and a toolbar. The main form has two radio buttons: "Assigned To" (selected) and "Requested". Below are input fields for "Cust Area", "Property Custodian", "Contact ID", "Last Name*", "First", "Mid", "User", and "Last Name*". There are also fields for "Agreement Identifier", "Type", "Site", "Structure Level 1", "Structure Level 2", "Manufacturer", "Model Number", "Description", "Serial Number", "Interest Type", and "Barcode #". Further down are "Initial Event", "User Fields*", "Interest Type" (radio buttons: Agreement, Excess, Financial, Inactive, Inventory (selected), Subset), "User Fields*", and "Global User Fields*". At the bottom are buttons for "Last Criteria", "Execute", and "Cancel". The status bar shows "Record: 1/1". The Windows taskbar at the bottom shows the Start button and several open applications including Sunflower Enterprise and a query window.

5. Search based on your specific criteria (e.g. if you want to update locations, query by location. To update a User, query by User, etc.)
6. Select the **Find** button from the toolbar.

Result: All assets with the criteria selected will display.

Sunflower Enterprise - Production 4.5.0.0 - 09/08/2007 (ZSURI@ospps3)

Exit Agree Contract Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Eunctions Utility Window Help

Change Inventory Asset Information - asmn2020

New Information

Cust Area PC

Contact ID Last Name* First Mid

User Last Name* First Mid

Location* WASHINGTON, DC _BUILDING _RONALD REAGAN _ROOM _B800 Expected Return Date

Document* Effective Date 09/08/2007

Assets

Ok	Δ	Barcode #	Manufacturer / Model / Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0001	DELL INC. _1150 INSPIRON _LAPTOP COMPUTER
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0002	DELL INC. _1150 INSPIRON _LAPTOP COMPUTER
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0003	DELL INC. _INSPIRON 3500 _MICROCOMPUTER, RACKMOUNT
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0004	DELL INC. _INSPIRON 3500 _MICROCOMPUTER, RACKMOUNT
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0005	DELL INC. _INSPIRON 3500 _MICROCOMPUTER, RACKMOUNT
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0006	DELL INC. _INSPIRON 3500 _MICROCOMPUTER, RACKMOUNT
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0007	DELL INC. _INSPIRON 3500 _MICROCOMPUTER, RACKMOUNT
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		

7. Select the **Save** button from the toolbar to save your work.

Result: The assets have now been updated to reflect the new information.

8. Review the **Message** field at the bottom of the screen to ensure that the request was successfully completed without errors.

Sunflower Enterprise - Production 4.5.0.0 - 09/08/2007 (ZSURI@ospps3)

Exit Agree Contract Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Eunctions Utility Window Help

Change Inventory Asset Information - asmn2020

New Information

Cust Area PC

Contact ID Last Name* First Mid

User Last Name* First Mid

Location* WASHINGTON, DC _BUILDING _RONALD REAGAN _ROOM _B800 Expected Return Date

Document* Effective Date 09/08/2007

Assets

Ok	Δ	Barcode #	Manufacturer / Model / Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0001	DELL INC. _1150 INSPIRON _LAPTOP COMPUTER
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0002	DELL INC. _1150 INSPIRON _LAPTOP COMPUTER
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0003	DELL INC. _INSPIRON 3500 _MICROCOMPUTER, RACKMOUNT
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0004	DELL INC. _INSPIRON 3500 _MICROCOMPUTER, RACKMOUNT
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0005	DELL INC. _INSPIRON 3500 _MICROCOMPUTER, RACKMOUNT
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0006	DELL INC. _INSPIRON 3500 _MICROCOMPUTER, RACKMOUNT
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0007	DELL INC. _INSPIRON 3500 _MICROCOMPUTER, RACKMOUNT
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		

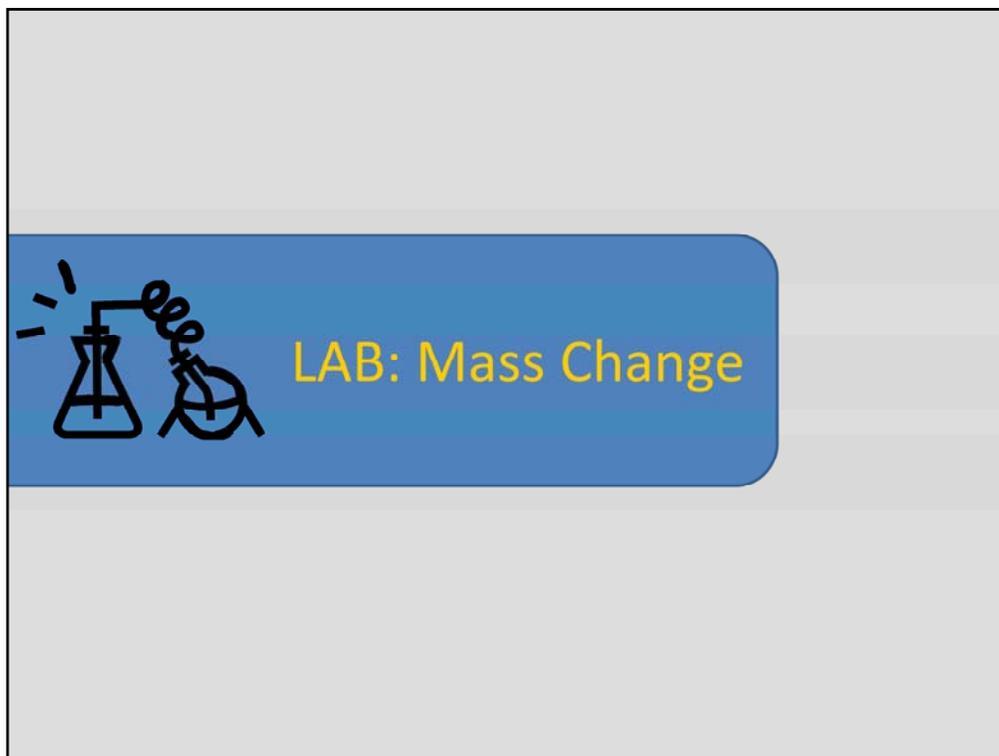
Message Complete

End of activity.

Mass Change

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SF 4.5



Update all the assets in your assigned Custodial Area for training (see your Login Information card) to the User field to you. Use the Last Name field to lookup your last name and select your last name, first name from the list.

Value Adjustments



A PC may update the asset value of a property record using the **Maintain Inventory Asset** screen. The Asset Value should not be changed, but rather updated. The initial acquisition cost should stay the same. A value may be added or subtracted to represent a betterment to the asset or some other value related addition or subtraction.

Asset Value Adjustments

The screenshot displays the 'Maintain Inventory Assets' screen in Sunflower Enterprise. The main form contains the following fields:

- Barcode #:** C00001346984 (highlighted with a blue box and labeled '1')
- Manufacturer:** DELL INC.
- Description:** LAPTOP COMPUTER
- Value:** \$2,457.00 (highlighted with a blue box and labeled '2')
- Acquisition Date:** 07/08/2002
- Responsibility Date:** 07/26/2002

An 'Asset Value Components' dialog box is open, showing a table with the following data:

Value Type	Asset Value User Fields*	Cap?
ACQUISITION COST	\$2,457.00	No
		No
		No
		No

The third row in the table is highlighted with a blue box and labeled '3'. A large number '3' is also present on the right side of the screenshot.

Use the **Maintain Inventory Assets** screen to make a value adjustment to a specific asset.

Area 1 Enter the barcode number in this area.

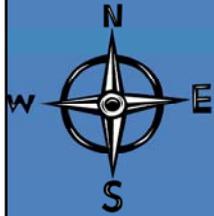
Area 2 The current value of the asset is shown here. Double click this field to adjust the asset value.

Area 3 Use the next available line to enter the amount of value added or subtracted.

-The **Type** field allows you to choose the type of the adjustment from the LOV. (Acquisition Cost, Discount, Installation, Shipping, Trade-In)

-The **User Fields*** are required for capital assets

Note: To *decrease* the value of an asset, enter a *negative* (-) amount in the **(+/-) Dollar Value** field.



NAV: Update Asset Value

Update Asset Value

Inventory Clerk/ Inventory Manager

M > Mgmt > Maintain Inventory Assets

Maintain Inventory Assets

The screenshot shows a web browser window titled "Maintain Inventory Assets - asmn2010 (Page 1 of 2)". The main content area is titled "Inventory Assets" and contains a form with the following fields and controls:

- Barcode # [highlighted in yellow]
- Barcode Type []
- Existing interest asset []
- Type []
- Barcode # []
- Released? []
- Default Location* []
- Copy to Location? [checked]
- Catalog Identifier* []
- Commodity Asset []
- Parents []
- Children []
- C/P/A []
- Manufacturer []
- Model Number []
- Description []
- Model Name []
- Serial Number []
- Drawing No. []
- Initial Event []
- User Fields* []
- Asset Value* []
- Acquisition Date []
- Responsibility Date [highlighted in yellow]
- Asset Condition []
- Effective Date []
- Expected Return Date []
- Utilization Code []
- Flags* []
- Activity Type []
- Bureau or Region []
- Property Accountability Office []
- Cust Area []
- Accepted? []
- Property Custodian []
- Contact ID []
- Last Name* []
- First []
- Mid []
- User []
- Last Name* []
- First []
- Mid []
- Location* []
- Document* []
- User Fields* []
- Global User Fields* []

At the bottom of the form are four buttons: "Page 2", "Commodity", "Comment / Picture / Attachment", and "Re-Request".

Below the form, a status bar displays: "The tracking identifier assigned to the interest asset" and "Record: 1/1".

1. Enter the barcode number of the item to be updated in the **Barcode Number** field and **Tab**.

Result: The remainder of the property record auto-populates.

Sunflower Enterprise - Production 4.5.0.0 - 09/08/2007 (ZSUR1@osppsd3)

Maintain Inventory Assets - asrmn2010 (Page 1 of 2)

Inventory Assets

Barcode # **C00001346984** Barcode Type Existing interest asset Type Barcode # Released? Y

Unique Name

Default Location*

Catalog Identifier* 10036 Commodity Asset Parents 0 Children 0 C/P/A

Manufacturer DELL INC. Model Number PRECISION 340

Description MICROCOMPUTER, DESKTOP, TOWER, MI Model Name PRECISION 340

Serial Number 39N5P11 Drawing No.

Initial Event PURCHASE User Fields*

Asset Value* \$2,457.00 Acquisition Date 07/08/2002 Responsibility Date 07/26/2002

Asset Condition Effective Date 09/08/2007 Expected Return Date

Utilization Code IN SERVICE Flags* S O Activity Type AGENCY OWNED

Bureau or Region OS Property Accountability Office 51OASA

Cust Area 51OAOAITB Accepted? Y Prop Custodian

Contact ID Last Name* First Mid

User Last Name* First Mid

Location* WASHINGTON, DC_BUILDING_HCHE_ROOM_1311

Document*

User Fields*

Global User Fields*

Page 2 Commodity Comment / Picture / Attachment Re-Request

2. Double click the **Asset Value** field.

Result: The Asset Value complex field displays.

Maintain Inventory Assets - asrmn2010 (Page 3 of 3)

Asset Value Components

Value Type	Asset Value	User Fields*	Cap?
ACQUISITION COST	\$2,457.00	51**2002**98**51-11-00-0000-00-00-00-00****00-00-00-00**012400**000**31-	No
			No

3. Select the next empty line.

Result: The value type will auto populate to Acquisition Cost.

4. Enter the **amount** by which to change the cost in the **Asset Value** field.

Note: For negative changes, enter a minus sign (-) in front of the amount.

5. Enter the required information for capital assets in the **User Fields**, if necessary.

Asset Value Components			
Value Type	Asset Value	User Fields*	Cap?
ACQUISITION COST	\$2,457.00	51**2002**98**51-11-00-0000-00-00-00-00****00-00-00-00**0124000**000**31-	No
ACQUISITION COST	\$100.00		No

6. Select the **Save** button on the toolbar to save and close the asset value window.
7. Select the **Save** button on the toolbar to save the asset value update to the asset.

Result: The asset value is updated.

Sunflower Enterprise - Production 4.5.0.0 - 09/08/2007 (2SURI@osppsd3)

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

Barcode # Barcode Type Existing interest asset Type Barcode # Released? Y

Unique Name

Default Location*

Catalog Identifier* Commodity Asset Parents Children C/P/A

Manufacturer Model Number

Description Model Name

Serial Number Drawing No.

Initial Event User Fields*

Asset Value* Acquisition Date Responsibility Date

Asset Condition Effective Date Expected Return Date

Utilization Code Flags* Activity Type

Bureau or Region Property Accountability Office

Cust Area Accepted? Y Prop Custodian

Contact ID Last Name* First Mid

User Last Name* First Mid

Location*

Document*

User Fields*

Global User Fields*

Page 2 Commodity Comment / Picture / Attachment Re-Request

End of activity.



Update the asset value of the laptop you have created with Barcode # CD01MMDDYYXX (where MM=Month, DD=Day, YY=Year, and XX=your student number) and updated to Inspiron 3500. **Add \$450 to its value.**

Lesson Summary

- You should now be able to:
 - Summarize the steps used to update the property record
 - Update Serial Number, Manufacturer, Model, Barcode number
 - Update Contact ID, User, and Location within Custodial Area
 - Update the Asset Value

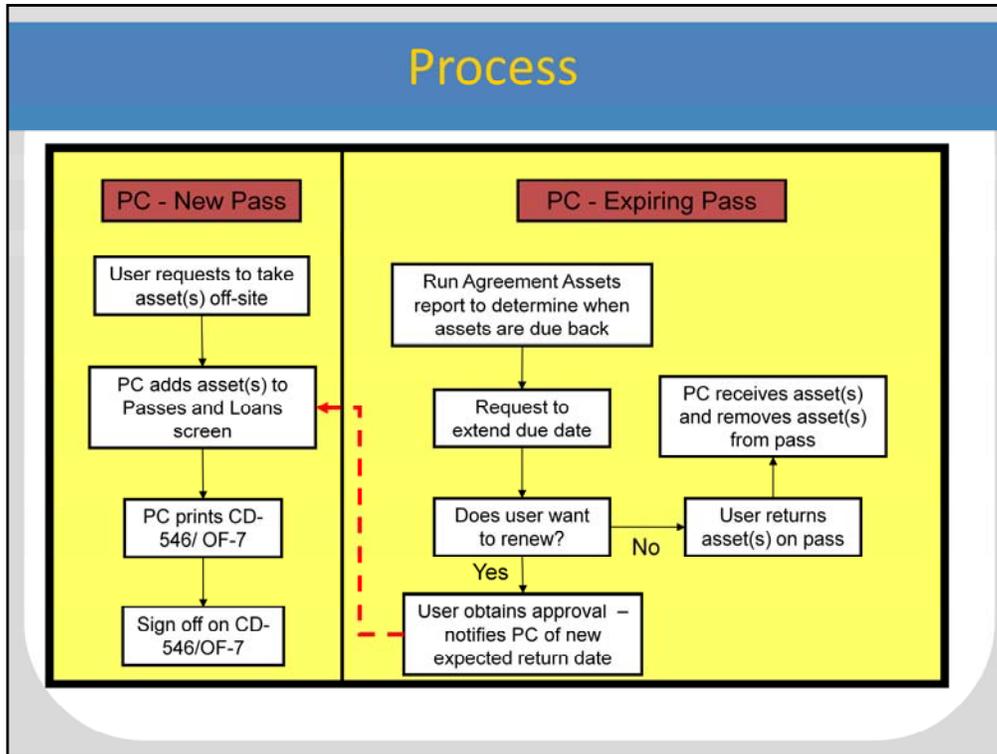


Chapter 6: Passes and Loans (CD-546 and OF-7)

Sunflower Assets 4.5

Lesson Objectives

- After this lesson you should be able to:
 - Explain the process behind passes and loans
 - Add items to passes and loans
 - Print the CD-546 and OF-7 documents
 - Modify passes and loans
 - Remove items from passes and loans
 - Determine if an item is currently on pass or loan
 - Run a report to determine which items are on pass or loan



To increase audit traceability and reduce manual paperwork processing, a new Passes and Loans screen has been added to Sunflower. This screen will be used to place items on passes and loans, print the CD-546 and OF-7, and remove items from passes and loans. Sunflower's Summary and History will reflect each transaction, and Sunflower's standard reports can be used to determine which items are out on pass. The above process describes how PCs will use this screen.

Notes:

- All Pass types will be assigned a system-generated **Pass Number**; this value can be used to query passes and run reports
- Users can create multiple passes per person or organization. For example, one pass may be created for a user where the asset is due back in one month. That same user takes another asset which is due back in one year - in this case the PC may want to create two passes for that one person since the items are due back several months apart.

Passes and Loans

Pass

Pass Type: PROPERTY PASS Pass Number: CPPTB1-00002

Loan Purpose: WORKING FROM HOME

Loan Date: 11/20/2009 Due Date: 01/20/2010

Borrower

Person: Identifier: CPPTB1 Last: BRUNSON First: TAMY Mid:

Organization:

Street: 1441 L STREET NW City, State, Zip: WASHINGTON, DC 20230

Office: BEA Room Number: 2029

Contact Name: Telephone:

Assets

Barcode	Manufacturer	Model	Serial#
CD0000138981	ONKYO	TA-RW505	4708918625

Print CD-546 Print OF-7

The **Passes and Loans** screen is used to add assets to passes/loans, remove assets from passes/loans, and update existing passes/loans.

Property Passes - Used with DOC employees only

- Must have a **Person** name – if the person’s name is not filled out, you will not be able to save
- **Person** name must match the name of the **User** on the asset record – if this does not match, you will not be able to save
 - However, for ‘shared’ property such as laptop pools, Sunflower users may prefer to keep one person’s name as the **User** on each asset record. In this case, that person’s name could go on the Property Pass, and the actual borrower’s name could go in the **Loan Purpose** field.
- When complete, both the CD-546 and the OF-7 will be available for printing
- **Contact Name** and **Telephone** information are not needed

Repair Passes - Used when sending an item to an external organization for repair

- Must have an **Organization** – if this is not filled out, you will not be able to save
- **Contact Name** and **Telephone** information should be provided
- When complete, only the CD-546 will be available for printing

CD-546

Form CD-546 (10-99) LF		PERSONAL PROPERTY DIVISION LOAN AGREEMENT/RECEIPT		U.S. DEPARTMENT OF COMMERCE Office of Administrative Operations	
DATE LOANED:	20-NOV-09	RETURN DUE DATE:	20-JAN-10		
NAME OF BORROWER:	BRUNSON TAMY CPPTB1		ORGANIZATION:		
ADDRESS:	1441 L STREET NW		OFFICE:	BEA	
	STREET		ROOM NUMBER:	2029	
	WASHINGTON, DC 20230		TELEPHONE NUMBER:		
	CITY, STATE, ZIP				
DESCRIPTION OF EQUIPMENT TO BE LOANED:					
TAPE RECORDER, OTHER THAN CASSETTE					
BARCODE NUMBER:	CD0000138981	SERIAL NUMBER:	4708918625	MODEL NUMBER:	TA-RW505
PURPOSE OF LOAN:					
WORKING FROM HOME					
CONDITIONS OF LOAN					
1. The borrower of the above equipment agrees to return the items in the same condition as received from the U.S. Department of Commerce, normal wear and tear accepted, on or before the above return date, unless the loan period will not exceed thirty (30) days.					
2. The equipment shall not be loaned or transferred to a third party without the written consent of the Personal Property Division authorizing official.					

- Loans** - Used with either a person or organization – so long as it is external to DOC
- Either a **Person** or an **Organization** may be chosen, depending on who/what organization is being loaned the item(s)
 - **Contact Name** and **Telephone** information should be provided
 - When complete, only the CD-546 will be available for printing

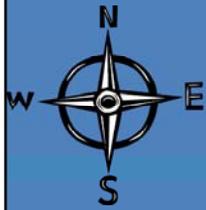
Users can query existing passes by:

- Pass Type**
- Pass Number**
- Loan Date**
- Due Date**
- Person Name**
- Organization, or**
- Office**

OF-7

OPTIONAL FORM 7 SEPTEMBER 1988 PRESCRIBED BY GSA FPMR (41 CFR) 101-20.1 ¹	PROPERTY PASS	1. DATE ISSUED 11/20/2009
This pass is to be used whenever property is removed from the building. It is to be properly filled in and signed and handed to the guard when leaving the building.		
2. NAME BRUNSON TAMY CPPTB1	3. BUILDING 1441 L STREET NW WASHINGTON, DC 20230	
4. DESCRIPTION OF PROPERTY BEING REMOVED BARCODE: CD0000138981 SN: 4708918625 TAPE RECORDER, OTHER THAN CASSETTE		
5. PROPERTY BELONGS TO 53BEA5A001	6. DEPARTMENT OR AGENCY BEA	
7. SIGNATURE OF PERSON AUTHORIZING REMOVAL OF PROPERTY	8. TITLE	
	9. PASS GOOD UNTIL 01/20/2010	

NSN 7540-00-834-4264



NAV:
Add Assets to Pass

Add Assets to Pass

Inventory Clerk/Agreement Clerk

Admin > User Extensibility > User Defined Menu> DoC Forms> CD-546 / OF-7

Passes and Loans

Pass	
Pass Type	Pass Number
Loan Purpose	
Loan Date	Due Date

Borrower				
Person	Identifier	Last	First	Mid
Organization	OS			
Street	City, State, Zip			
Office	Room Number		Telephone	
Contact Name				

Barcode	Manufacturer	Model	Serial#

Print CD-546 Print OF-7

1. Depending upon the type of pass, pick **Property Pass**, **Repair Pass**, or **Loan** from the **Type of Pass** list of values
2. Enter the **Purpose of Loan** (e.g. Working from home, item is broken, research project, etc.)
3. Enter the date the pass is issued in **Loan Date**
4. Enter the date the item is due back in **Due Date**
5. Enter **Organization** (Repair Pass or Loans only)
6. Enter the **Person Last Name** and hit the tab key (Property Pass and Loans only)
7. Select the **First Name** of the borrower
8. Enter the address of the borrower, using **Street, City, State, and Zip**

Add Assets to Pass

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SF 4.5

9. Enter the **Office** and **Room Number** of the borrower (Property Pass only)
10. Enter the **Contact Name** and the **Telephone** number of the contact person (Repair Pass and Loans only)
11. Enter the Barcode Number(s) in the **Assets** section
12. Hit the **Save** button

Result: The Status bar at the bottom of the screen should show the “Transaction complete: X records applied and saved”.

Pass

Pass Type: **PROPERTY PASS** Pass Number: CPPTB1-00002

Loan Purpose: WORKING FROM HOME

Loan Date: 11/20/2009 Due Date: 01/20/2010

Borrower

Person: Identifier: CPPTB1 Last: BRUNSON First: TAMY Mid:

Organization:

Street: 1441 L STREET NW City, State, Zip: WASHINGTON, DC 20230

Office: BEA Room Number: 2029

Contact Name: Telephone:

Assets

Barcode	Manufacturer	Model	Serial#
CD0000138981	ONKYO	TA-RW505	4708918625

Print CD-546 Print OF-7

13. Hit each **Print** button to print both the **CD-546** and the **OF-7**

Result: You will be taken to the printed passes – print as needed

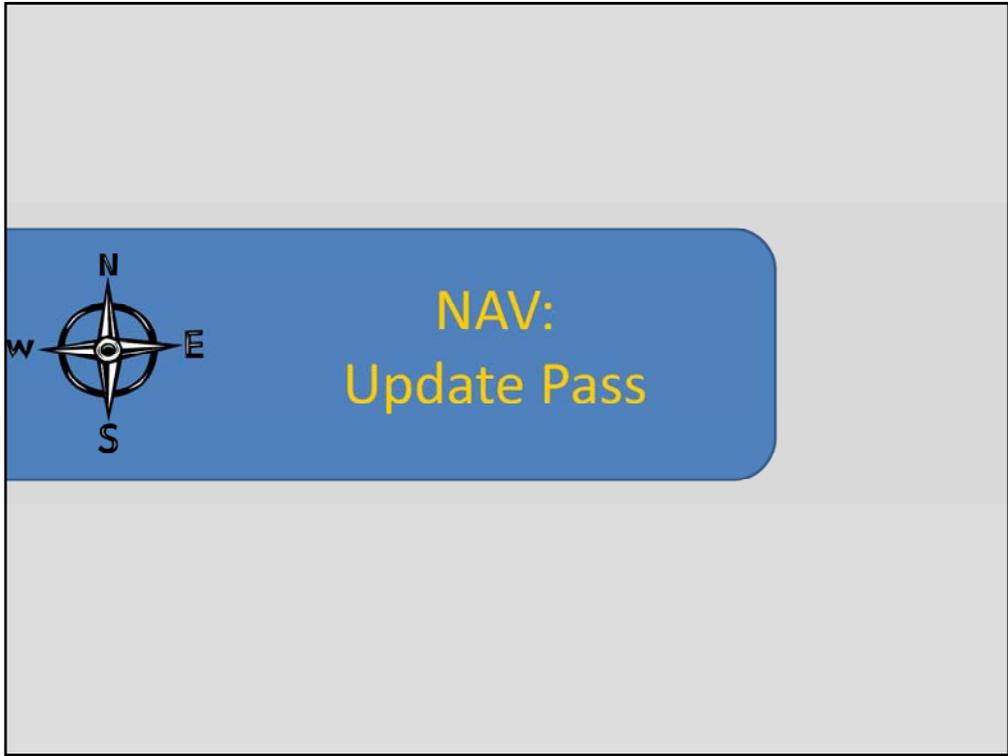
Note: If there are multiple assets on pass, each pass will have its own CD-546 or OF-7 page.

OPTIONAL FORM 7 SEPTEMBER 1988 PRESCRIBED BY GSA FPMR (41 CFR) 101-20.1*	PROPERTY PASS	1. DATE ISSUED 11/20/2009
This pass is to be used whenever property is removed from the building. It is to be properly filled in and signed and handed to the guard when leaving the building.		
2. NAME BRUNSON TAMY CPPTB1	3. BUILDING 1441 L STREET NW WASHINGTON, DC 20230	
4. DESCRIPTION OF PROPERTY BEING REMOVED BARCODE: CD0000138981 SN: 4708918625 TAPE RECORDER, OTHER THAN CASSETTE		
5. PROPERTY BELONGS TO 53BEA5A001	6. DEPARTMENT OR AGENCY BEA	
7. SIGNATURE OF PERSON AUTHORIZING REMOVAL OF PROPERTY	8. TITLE	
	9. PASS GOOD UNTIL 01/20/2010	
NSN 7540-00-634-4264		

End of activity.



Lab:
Add Assets to
Pass



Update Pass

Inventory Clerk/Agreement Clerk

Admin > User Extensibility > User Defined Menu> DoC Forms> CD-546 / OF-7

Passes and Loans

1. Hit the **Find** button.

Result: The screen will be placed in query mode.

2. Depending on which parameter you want to query by, enter one or more of the following parameters. Enter:

Field Name	Purpose
Pass Type	To pull up all passes of a specific type (Property Pass, Repair Pass, Loan)
Pass Number	To pull up a specific pass
Loan Date & Due Date	To pull up passes issued on a specific date or assets due back on a specific date, respectively
Person	To pull up all passes used to a specific person
Organization	To pull up all passes issued to a specific organization
Office	To pull up all passes issued within a specific DOC office

Update Pass

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SF 4.5

3. Hit the **Find** button again.

Result: Any passes meeting the query criteria will display.

Passes and Loans - excd0546

Pass

Pass Type: PROPERTY PASS Pass Number: CPPTB1-00002

Loan Purpose: WORKING FROM HOME

Loan Date: 11/20/2009 Due Date: 01/20/2010

Borrower

Person: Identifier: CPPTB1 Last: BRUNSON First: TAMY Mid:

Organization:

Street: 1441 L STREET NW City, State, Zip: WASHINGTON, DC 20230

Office: BEA Room Number: 2029

Contact Name: Telephone:

Assets

Barcode	Manufacturer	Model	Serial#
CD0000138981	ONKYO	TA-RW505	4708918625

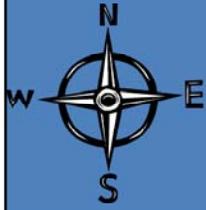
Print CD-546 Print OF-7

4. Optionally enter a new **Due Date**.
5. Optionally add other assets to the existing pass.
6. When complete, hit the **Save** button.

End of activity.



Lab:
Update Pass



NAV: Remove Assets from Pass

Remove Assets from Pass

Inventory Clerk/Agreement Clerk

Admin > User Extensibility > User Defined Menu> DoC Forms> CD-546 / OF-7

Passes and Loans

1. Hit the **Find** button

Result: The screen will be placed in query mode

2. Depending on which parameter you want to query by, enter one or more of the following parameters. Enter:

Field Name	Purpose
Pass Type	To pull up all passes of a specific type (Property Pass, Repair Pass, Loan)
Pass Number	To pull up a specific pass
Loan Date & Due Date	To pull up passes issued on a specific date or assets due back on a specific date, respectively
Person	To pull up all passes used to a specific person
Organization	To pull up all passes issued to a specific organization
Office	To pull up all passes issued within a specific DOC office

Remove Assets from Pass

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SF 4.5

3. Hit the **Find** button again

Result: Any passes meeting the query criteria will display

The screenshot shows a web application window titled "Passes and Loans - excd0546". It is divided into three main sections: "Pass", "Borrower", and "Assets".

Pass Section:

- Pass Type: PROPERTY PASS (dropdown menu)
- Pass Number: CPPTB1-00002
- Loan Purpose: WORKING FROM HOME
- Loan Date: 11/20/2009
- Due Date: 01/20/2010

Borrower Section:

- Person: Identifier (CPPTB1), Last (BRUNSON), First (TAMY), Mid ()
- Organization: ()
- Street: 1441 L STREET NW
- City, State, Zip: WASHINGTON, DC 20230
- Office: BEA
- Room Number: 2029
- Contact Name: ()
- Telephone: ()

Assets Section:

Barcode	Manufacturer	Model	Serial#
CD0000138981	ONKYO	TA-RW505	4708918625

At the bottom of the window, there are two buttons: "Print CD-546" and "Print OF-7".

4. Click on the asset and hit the **Remove Record** button (to remove other assets, click on other assets and repeat this step)

Passes and Loans - excd0546

Pass

Pass Type: PROPERTY PASS Pass Number: CPPTB1-00002

Loan Purpose: WORKING FROM HOME

Loan Date: 11/20/2009 Due Date: 01/20/2010

Borrower

Person: Identifier: CPPTB1 Last: BRUNSON First: TAMY Mid:

Organization:

Street: 1441 L STREET NW City, State, Zip: WASHINGTON, DC 20230

Office: BEA Room Number: 2029

Contact Name: Telephone:

Assets

Barcode	Manufacturer	Model	Serial#

Print CD-546 Print OF-7

5. Hit the **Save** button

Note: Assets will not be officially removed from the pass until you hit the **Save** button.

End of activity.



Lab:
Remove Assets
from Pass

Timeline

Timeline Details

UII: None Captured
Other Identifiers: AGR, INV / CD0001760936

Include Events
 Include Resolutions
 Include Contract Reports
 Include Open Requests
 Include Closed Requests
 Include IJID/WAWF

Sort By: DATETIME DESC | CATEGORY ASC | DESCRIPTION ASC | Get Records

Datetime	Category	Description	Attributes	Document?
11/20/2009 10:35:06	INITIAL EVENT	(AGR CD0001760936) PLACED ON PASS		Y
11/20/2009 10:35:06	ONGOING EVENT	ADDED TO AGREEMENT	CPPVS1-00002 PROPERTY PASS_PLACED ON Pz	Y

Details

Timeline Details

Include history

Manufacturer: DELL INC.
 Description: LAPTOP
 Serial Number: G2MSPD1
 Initial Event: PURCHASE ORDER-DOC
 Final Event:
 Asset Value*: \$1,947.65 (NOT CAPITALIZ)
 Asset Condition:
Utilization Code: ON PASS
 Bureau or Region: ITA

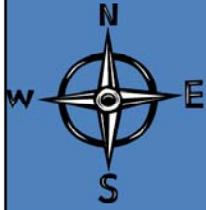
Model Number: LATITUDE D630
 Model Name: LATITUDE
 Drawing No.:
 Stock Number:
 User Fields*: COPPER RIVER IT
 User Fields*:
 Acquisition Date: 08/17/2007
 Responsibility Date: 10/24/200
 Effective Date: 11/20/2009
 Expected Return Date:
 Flags: S O
 Activity Type: AGENCY OWNED
 Property Accountability Office: 55003A

The **Inventory Asset Summary and History** screen will show when assets are out on pass.

The **Timeline** shows the item has been **Added to Agreement**. Note to the Attributes on the right – these show the Pass Number.

The **Details** show the item is **On Pass, On Repair, or Loaned Out** – note the **Utilization Code**.

Once the item is removed from pass, the **Timeline** will show this as well, and the **Utilization Code** will show the item as back **In Service**.



NAV:
Print Report to View
Assets on Pass

Print Report to View Assets on Pass

Inventory Clerk/ Agreement Clerk
Agree > Agreement Reports
Agreement Reports

The screenshot shows the Sunflower Enterprise software interface. At the top, it displays the logo "Sunflower Enterprise" and the version "Sunflower Enterprise - Production 4.5.0.0". Below the logo, the text "ASAG6000 Agreement Reports" is visible. A blue banner contains the instruction "To run a report, click one of the links below." Below this banner is a grid of report links. The links are arranged in two columns. The first column contains: Agreement Assets (Global Information), Agreement Activity, Agreement Additions and Deletions, Agreement Asset Activity Summary by Asset Flag, Agreement Asset Activity Summary by Asset Type, Agreement Asset Interface Processing Results, Agreement Asset Ongoing Events, Agreement Asset Summary by Asset Flag, Agreement Asset Summary by Asset Type, and Agreement Asset Timeline. The second column contains: Agreement Asset Utilization, Agreement Assets, Asset Search, Asset Structure, Material On-Hand, Material On-Loan, Material Transactions, Material Usage Statistics, Material Receipt Ticket, and Purchase Order Aging Report. Below the grid, there are two buttons: "Previously Run Report" and "Reports Main Menu".

Agreement Assets (Global Information)	Agreement Asset Utilization
Agreement Activity	Agreement Assets
Agreement Additions and Deletions	Asset Search
Agreement Asset Activity Summary by Asset Flag	Asset Structure
Agreement Asset Activity Summary by Asset Type	Material On-Hand
Agreement Asset Interface Processing Results	Material On-Loan
Agreement Asset Ongoing Events	Material Transactions
Agreement Asset Summary by Asset Flag	Material Usage Statistics
Agreement Asset Summary by Asset Type	Material Receipt Ticket
Agreement Asset Timeline	Purchase Order Aging Report

[Previously Run Report](#)
[Reports Main Menu](#)

1. Select the **Agreement Assets** report link (right side - second from the top).

Note: Do not select the Agreement Assets (Global Information) report link. This report will not provide you with the information you need.

Result: The report criteria screen displays.

How Would You Like to Select the Assets that Appear on the Report?

Agreement Identifier Type

You can use '%' as a wildcard character in the Identifier field

Organization By

Sponsor

Organization With

Person With Identifier Last Name First Mid Prefix Suffix

Only Agreements Scheduled to End Between (MM/DD/YYYY) and (MM/DD/YYYY)

Assets As Of (MM/DD/YYYY)

Bureau or Region

Property Accountability Office

Cust Area

Include the Cust Area's Child Organization

Property Contact Identifier Last Name First Mid Prefix Suffix

Current User Identifier Last Name First Mid Prefix Suffix

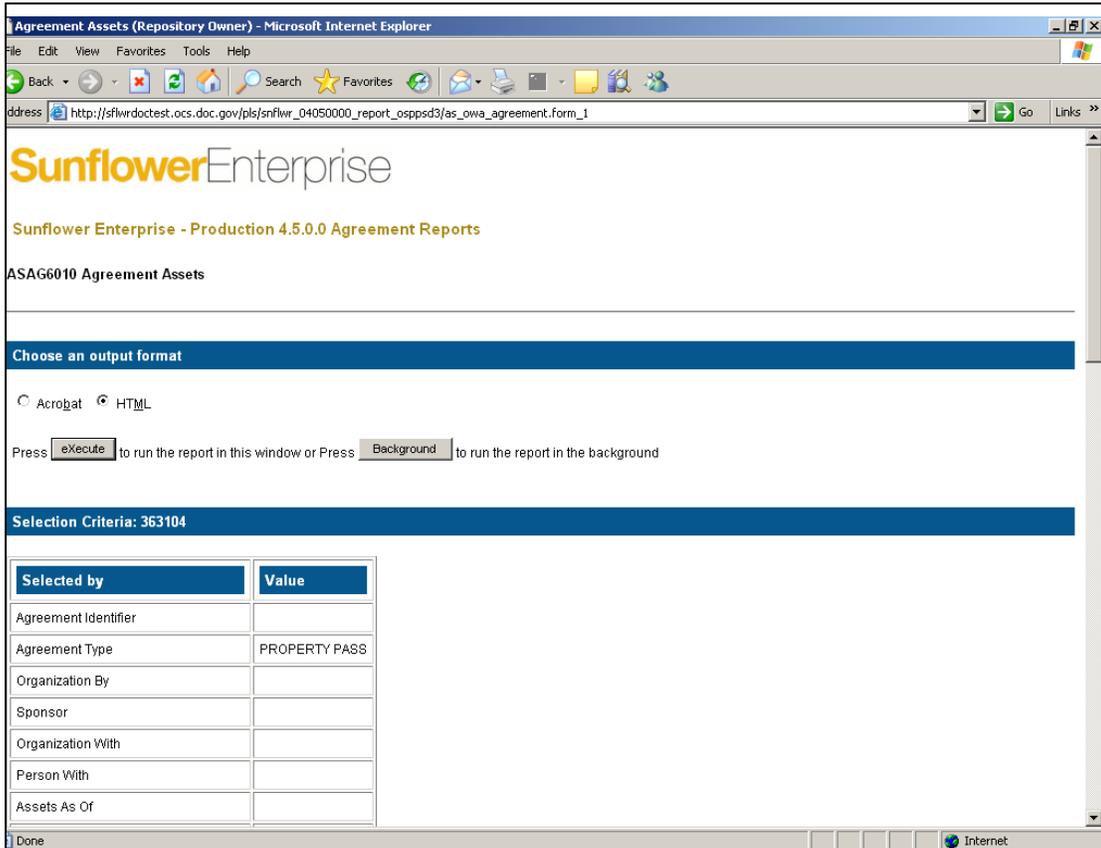
Done

2. Depending on what you want to view, enter one or more of the following parameters (or use any other parameters as appropriate). Enter:

Field Name	Purpose
The Agreement Identifier (Pass Number) or the Agreement Type (Property Pass, Repair Pass, Loan Pass)	To view specific passes or types of passes
The Organization With organization	To view passes out with a specific organization
The Person Last Name and First Name	To view passes out with a specific person
Your Cust Area (Custodial Area)	To view all assets on pass or loan in your Custodial Area
The Only Agreements Scheduled to End Between fields	To view assets due back within a specified time frame

- Optionally check the **Asset Details** box towards the bottom of the screen to see additional information about the assets on pass
- Hit the **Submit** button

Result: A confirmation and output page displays.



- Select **Acrobat** as the output format
- Hit the **Execute** button

Result: The **Agreement Assets** report displays. Scroll to the third page to view the results.



Lab:
Print Report to View
Assets on Pass

Lesson Summary

- You should now be able to:
 - Explain the process behind passes and loans
 - Add items to passes and loans
 - Print the CD-546 and OF-7 documents
 - Modify passes and loans
 - Remove items from passes and loans
 - Determine if an item is currently on pass or loan
 - Run a report to determine which items are on pass or loan



Chapter 7: Transfer Assets

Sunflower Assets 4.5

Lesson Objectives

- After this lesson you should be able to:
 - Summarize the steps used to transfer assets
 - Request a transfer
 - Generate a report to determine whether or not there are any open requests for transfers to your custodial code
 - Accept a transfer coming from within the same Bureau or Region
 - Accept a transfer for assets coming from outside the Bureau or Region for redeployment of excess assets
 - Withdraw a transfer request
 - Deny a transfer

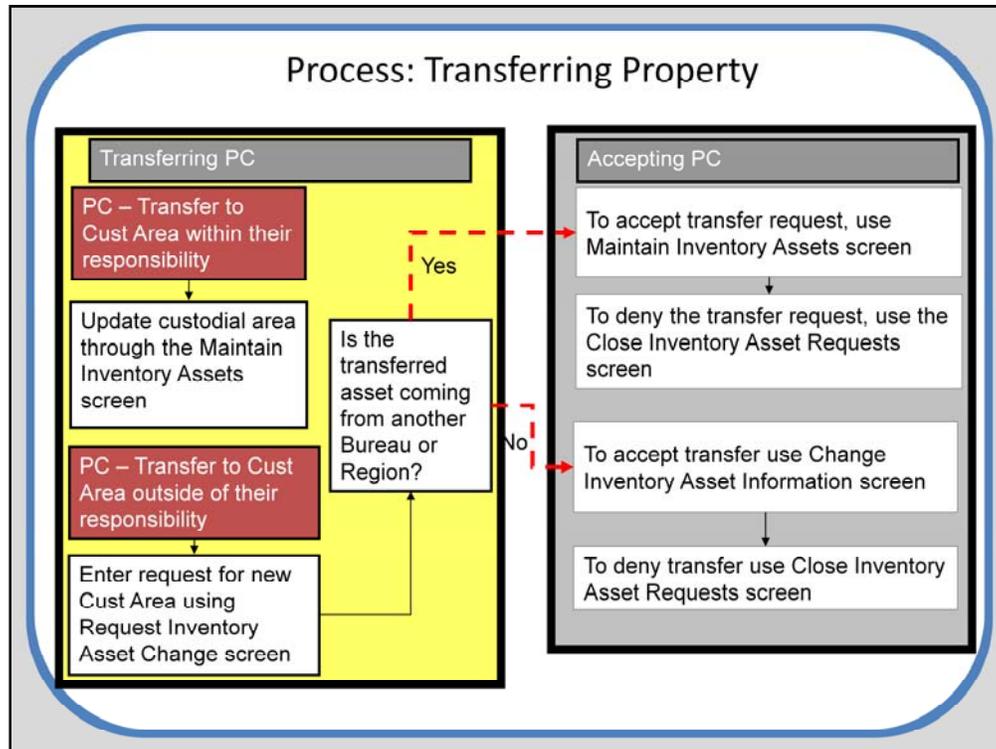
Sunflower Transfer Capabilities



The Sunflower Property system provides the capability to:

- Update the property record of assets that are pending transfer (Property Custodian, Contact ID, User, Location);
- Reject transfer requests;
- Transfer and accept an unlimited number of assets at once; and
- Allow the PC to withdraw transfer requests for the transfer of assets so that the assets may be utilized elsewhere within the custodial area.

In order to provide inter-organizational transfers, the Sunflower software uses a request/accept/deny model (“handshake”), which ensures that asset accountability is not transferred without the consent of both parties. This “handshake” permits users to request that another user become accountable for an asset. If the second party agrees to the transfer, the request is accepted and accountability is transferred without further action on the part of the requesting party. If the second party disagrees, the request is denied.



Transfer tips:

Owning PC

- If the owning PC is also the PC of the new custodial area, then the owning PC can update the custodial area on either the **Maintain Inventory Assets** screen or **Change Inventory Asset Information** screen.
- If the owning PC is *not* the PC of the new custodial area, then the PC enters a request for transfer using the **Request Inventory Asset Change** screen.

Accepting PC

- The accepting PC decides whether or not to accept the transfer request.
- There are two methods used to accept a transfer, one for assets within the Bureau or Region, and one for assets from another Bureau or Region

Note 1: If needed, the PC can also withdraw the transfer request using the **Close Inventory Asset Requests** screen. See the page entitled *Withdraw or Deny Transfer* for details.

Request Transfer

Request Information

Cust Area: 65001A002

Contact ID: Last Name*: First: Mid:

User: Last Name*: First: Mid:

Location*:

Assets

Ok	Barcode #	Manufacturer / Model / Official Name
<input checked="" type="checkbox"/>	CDSAPS0001	DELL INC_1150 INSPIRON_LAPTOP COMPUTER
<input checked="" type="checkbox"/>	CDSAPS0002	DELL INC_1150 INSPIRON_LAPTOP COMPUTER
<input type="checkbox"/>		

Message Complete

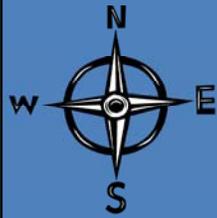
Use the **Request Inventory Asset Change** screen to request transfers.

Area 1 Request Information – To enter the information about where/who you want the asset transferred to, fill in the fields in the **Request Information** portion of the screen. If you do not know the exact **Contact ID**, **User**, or **Location**, simply fill in the new **Cust Area**. The accepting PC can then update the other information upon accepting the request.

Area 2 Assets – Enter any assets to be transferred in this portion of the screen. You can enter as many assets as you need.

Examples:

- To transfer all of your assets to another custodial area, select the **Barcode Number** field and select the **Find** button from the toolbar. Enter your custodial area to query, then select the **Execute** button on the bottom of the query screen. This will populate all of your custodial area's assets on the above screen.
- To transfer all assets from one location, select the **Barcode Number** field and select the **Find** button from the toolbar. Enter the current location of the assets in the **Location** fields, then select the **Execute** button on the bottom of the query screen. This will populate all of that location's assets on the above screen.



NAV: Request Transfer

Request Transfer

Inventory Clerk
 M > Mgmt > Request Inventory Asset Change
 Request Inventory Asset Change

1. To enter the information about where/who you want the asset transferred to, fill in the below fields in the **Request Information** portion of the screen.

Note: You do not have to enter all of the information below – only the information you know.

Field	Description
Cust Area	Enter the Custodial Area where the asset will be transferred to and Tab . <u>Note:</u> The requested Custodial Area must be different than the Custodial Area currently listed on the record. You will not be able to save the record if these are the same.
Property Custodian	Defaults based on the Custodial Area entered
Contact ID	If known, select the Last Name from the list of values, and then

	select a First name from the LOV. This will automatically populate the Contact ID's badge number in the Custodian field. <u>Note:</u> The requested Custodian must be different than the Custodian currently listed on the record. You will not be able to save the record if these are the same.
User	If known, select the Last Name of the User from the list of values, and then select a First name from the LOV. This will automatically populate the User's badge number in the User field. <u>Note:</u> The requested User must be different than the User currently listed on the record. You will not be able to save the record if these are the same.
Location	If known, select this field to launch the Location sub-form
- Site	Select the new site (e.g., Washington, DC) where the asset is located from the LOV
- Building	Select the name of the building from the LOV
- Room	Select the room number from the LOV
- Mail Stop	Enter the mail stop for the room number (if applicable)

2. Select the blue-highlighted **Barcode Number** field in the **Assets** portion of the screen.
3. Enter the barcode number of the property record to be changed, and then **Tab** out of the field.

Result: The following fields will be autofilled based upon the decal number selected.

Field	Description
Manufacturer	The standard manufacturer name
Model Number	The applicable standard model number
Official Name	The Official Name assigned to the asset's Manufacturer/Model Number combination in the property catalog

4. Enter additional barcode numbers in the **Barcode Number** fields if more than one asset is being transferred to the same custodial area.
5. Select the **Save** button from the toolbar to save your work.

Result: The transfer request will be sent to the PC who will be receiving the asset.

6. Review the **Message** field at the bottom of the screen to ensure that the request was successfully completed without errors.

Example: Below is a complete Request Inventory Asset Change screen:

Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (Z5URI@osppsd3)

Exit Agree Contract Mgmt Entry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Request Inventory Asset Change - asmn2030

Request Information

rea Cust Area 55001A002 todian

it ID Contact ID Last Name* First Mid

User Last Name* First Mid

Location*

Assets

Ok Δ	Barcode #	Manufacturer / Model / Official Name
<input checked="" type="checkbox"/>	CDSAPS0001	DELL INC. __1150 INSPIRON __LAPTOP COMPUTER
<input checked="" type="checkbox"/>	CDSAPS0002	DELL INC. __1150 INSPIRON __LAPTOP COMPUTER
<input type="checkbox"/>		

Message Complete

End of activity.

Inventory Assets With Requests Report

Sunflower Enterprise ASMBG040	Inventory Assets With Requests						Page 2 of 4 09/13/2007 21:21
Requested Cust Area : 55001A002							
Barcode #	Flags	Description	Manufacturer	Model Number	Serial Number	Asset Value	Eff Date
CDGAP0014	0	SERVER, AUTOMATIC R133 5600000000	DELL INC.	1400 POWEREDGE	CDGAP0014	2	6,800.00 09/09/2007
Current Cust Area : 55001A001				Requested Cust Area : 55001A002		- 09/13/2007	
Current Property Con :				Requester : SIBOIS SHEILA SIBOIS			
				Phone Number :			
				Requested Property Con :			
				Requester :			
				Phone Number :			
Current Current Use : MCGRATH CHRIS 26933				Requested Current User :			
				Requester :			
				Phone Number :			
Current Location : WASHINGTON, DC BUILDING : HCB				Requested Location :			
				Requester :			
				Phone Number :			
CDGAP0013	0	PROJECTOR, DIGITAL	DELL INC.	1100MD DLP	CDGAP0013	5	950.00 09/09/2007
Current Cust Area : 55001A001				Requested Cust Area : 55001A002		- 09/13/2007	
Current Property Con :				Requester : SIBOIS SHEILA SIBOIS			
				Phone Number :			
				Requested Property Con :			
				Requester :			
				Phone Number :			
Current Current Use : MCGRATH CHRIS 26933				Requested Current User :			
				Requester :			
				Phone Number :			
Current Location : WASHINGTON, DC BUILDING : HCB ROOM : 11				Requested Location :			
				Requester :			
				Phone Number :			

To determine whether or not there are any open requests for transfer to your custodial area, run the **Inventory Assets With Requests** report.



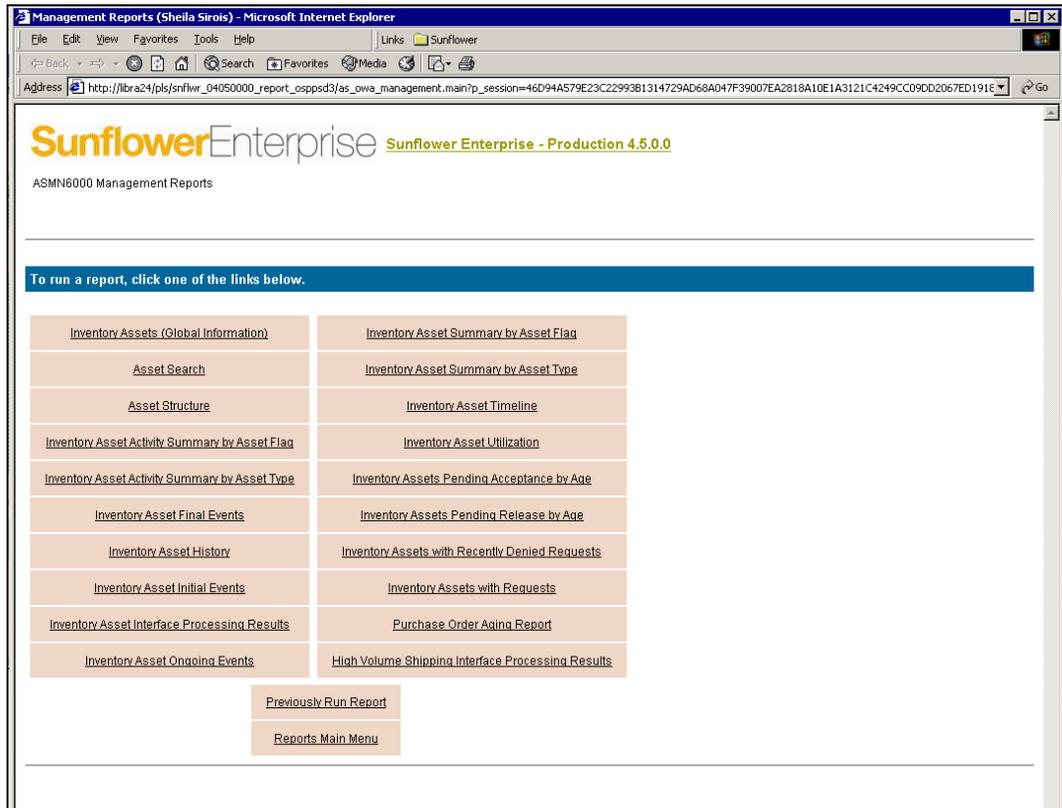
NAV: Generate Report for
Inventory Assets with
Requests

Generate Report for Inventory Assets with Requests

Inventory Clerk

M > Mgmt > Management Reports

Management Reports



1. Select **Inventory Assets with Requests**.

Result: The **Inventory Assets with Request** parameters are displayed:

2. Enter your Custodial Area in the **Requested Cust Area** field to view all assets being transferred to you.

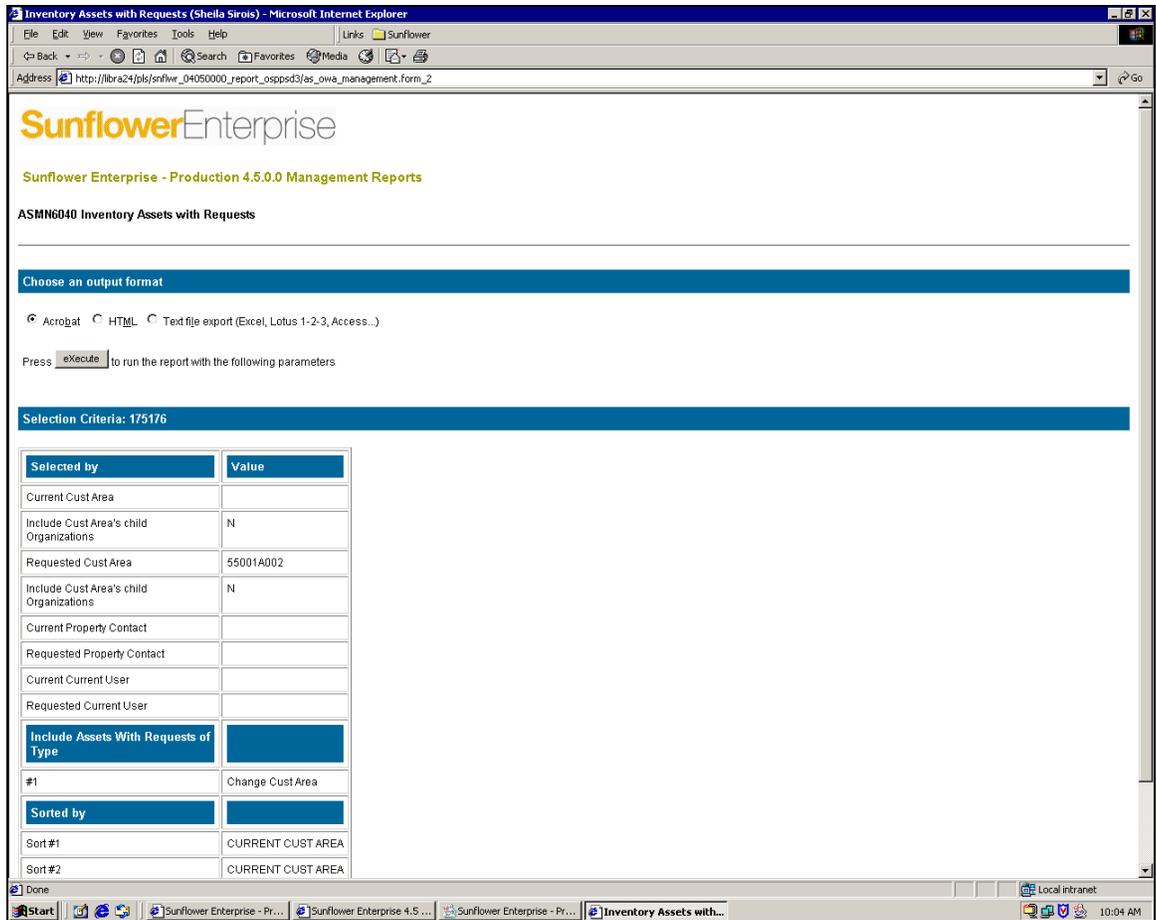
Note: To view assets you are transferring out, enter your custodial area in the Current Cust Area.

3. Select the type of request(s) from the **Include Which of the Following?** area.

Note: To view asset requests to your area, select **Change Cust Area Requests**. You must select at least one of these boxes to run the report.

4. Sort as needed.
5. Select the **Submit** button.

Result: A window displays that allows you to review the report parameters:



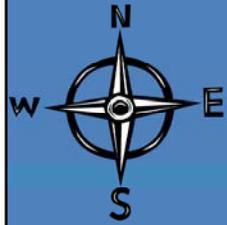
6. Select the **Acrobat** radio button.
7. Review your parameters and select the **eXecute** button.

Result: A report is opened in a separate window.

Requested Cust Area : 55001A002

Barcode #	Flags	Description	Manufacturer	Model Number	Serial Number	Asset Value	Eff Date
CDSAPS0002	S 0	LAPTOP COMPUTER	DELL INC.	1150 INSPIRON		\$ 1,150.00	09/08/2007
Current Cust Area : 55001A001				Requested Cust Area : 55001A002			- 09/09/2007
				Requester : SIROIS SHEILA SSIROIS			
				Phone Number :			
Current Property Con :				Requested Property Cont :			
				Requester :			
Current Current Use :				Requested Current User :			
				Requester :			
Current Location : WASHINGTON, DC				Requested Location :			
BUILDING : RONALD REAGAN ROOM : B800				Requester :			
				Phone Number :			
CDSAPS0001	S 0	LAPTOP COMPUTER	DELL INC.	1150 INSPIRON		\$ 1,150.00	09/08/2007
Current Cust Area : 55001A001				Requested Cust Area : 55001A002			- 09/09/2007
				Requester : SIROIS SHEILA SSIROIS			
				Phone Number :			
Current Property Con :				Requested Property Cont :			
				Requester :			
Current Current Use :				Requested Current User :			
				Requester :			
Current Location : WASHINGTON, DC				Requested Location :			
BUILDING : RONALD REAGAN ROOM : B800				Requester :			
				Phone Number :			
Total :						2 \$	2,300.00
Report Total :						2 \$	2,300.00

End of activity.



NAV: Accept Transfer
within Bureau or Region

Accept Transfer within Bureau or Region

Inventory Clerk

M > Mgmt > Change Inventory Asset Information

Change Inventory Asset Information

1. Enter the Custodial Area for the PC receiving the asset(s) in the **Cust Area** field and **Tab**. Optionally select the other information below as needed – as long as that information applies to all the assets being transferred:

Field	Description
Contact ID	The name of the new contact
User	The name of the new user
Location	The new location

2. Place the cursor in the **Barcode Number** field.

If you know the barcode numbers of the assets you will be accepting, goto task #3. Otherwise, goto task 4.

3. Enter the barcode numbers of the assets you will be accepting.

Goto task #9

Accept Transfer within Bureau or Region
 Sunflower Systems © 2009, All Rights Reserved
 SF 4.5

4. Select the **Find** button from the toolbar.

Result: You are taken to the Query Criteria screen.

Screenshot of the Sunflower Enterprise Query Criteria screen. The window title is "Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (2SURI@ospssd3)". The menu bar includes Action, Edit, Query, Block, Record, Field, Lookup, Help, and Window. The toolbar contains various icons for navigation and actions. The main form area has two radio buttons: "Assigned To" (unselected) and "Requested" (selected). Below these are input fields for "Cust Area", "Contact ID", "User", "Last Name*", "First", and "Mid". Further down are fields for "Agreement Identifier", "Site", "Structure Level 1", "Manufacturer", "Description", "Interest Type" (set to "INVENTORY ASSET"), and "Unique Identifier". There are also fields for "Type", "Structure Level 2", "Model Number", "Serial Number", and "Barcode #". At the bottom, there are "Initial Event", "User Fields*", "Interest Type" (radio buttons for Agreement, Excess, Financial, Inactive, Inventory (selected), Subset), another "User Fields*", and "Global User Fields*". At the very bottom are three buttons: "Last Criteria", "Execute", and "Cancel".

5. Click the **Requested** radio button in the top-left part of the screen.

Note: The resulting query will display only assets that have been requested for transfer to the Custodial Area selected. It will not display all the assets that belong to that Custodial Area.

6. Enter the Custodial Area for the PC receiving the asset(s) in the **Cust Area** field.
7. Select the **Find** button from the toolbar.

Result: You will be taken back to the **Change Inventory Asset Information** screen, and any barcode numbers that have been requested for transfer to that Custodial Area will be displayed.

Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (Z5URI@osppsd3)

Exit Agree Contract Mgmt Entry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Change Inventory Asset Information - asmn2020

New Information

Cust Area 55001A002 PC

Contact ID Last Name* First Mid

User Last Name* First Mid

Location*

Document*

Expected Return Date

Effective Date 09/09/2007

Assets

Ok	Δ	Barcode #	Manufacturer / Model / Official Name
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0001	DELL INC._1150 INSPIRON_LAPTOP COMPUTER
<input type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0002	DELL INC._1150 INSPIRON_LAPTOP COMPUTER
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		

Message

8. Uncheck any assets you do not want transferred.

9. Select the **Save** button from the toolbar.

Result: The **Message** field will indicate the record is **Complete**, and all assets that were checked will now belong to the new Custodial Area.

Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSUR1@ospps43)

Exit Agree Contract Mgmt Entry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Change Inventory Asset Information - asmn2020

New Information

Cust Area 56001A002 PC

Contact ID Last Name* First Mid

User Last Name* First Mid

Location* Expected Return Date

Document* Effective Date 09/09/2007

Assets

Ok	Δ	Barcode #	Manufacturer / Model / Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0001	DELL INC._1150 INSPIRON_LAPTOP COMPUTER
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0002	DELL INC._1150 INSPIRON_LAPTOP COMPUTER
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		

Message Complete

End of activity.

Accept Transfer from other Bureau or Region

The screenshot shows the 'Maintain Inventory Assets' screen in Sunflower Enterprise. The interface includes a menu bar at the top and a toolbar. The main area contains several sections of data entry fields:

- Barcode #:** CD0001041238 (highlighted with a blue box and a large '1' next to it).
- Manufacturer:** CROWN BROADCAST
- Description:** TRANSMITTER
- Model Name:** WEATHER RADIO SYSTEM
- Bureau or Region:** NOAA-NORFOLK (highlighted with a blue box and a large '2' next to it).
- Property Accountability Office:** 54000E (highlighted with a blue box and a large '2' next to it).
- Cust Area:** 54003E073
- User:** 12322
- Location:** SARASOTA, FL

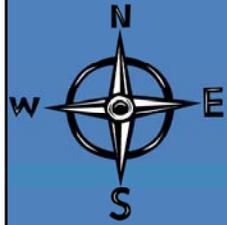
Buttons at the bottom include 'Add Information', 'Commodity', 'Comment / Picture / Attachment', and 'Re-Request'.

Assets may be transferred from one Bureau or Region to another.

The PC should use the **Maintain Inventory Asset** screen to accept this type of transfer, because along with the custodial area changing, the PC will also have to change the bureau/region and the Property Accountability Office. All of this can be changed in the Maintain Inventory Assets screen, while using the Change Inventory Asset Information screen only allows up to the custodial area level to be changed and an extra step would be required to change the bureau/region and the Property Accountability Office.

Area 1 Enter the barcode number of the asset in the Barcode Number field, then Tab.

Area 2 Update the Bureau or Region and the Property Accountability Officer. Change the Custodial Area, User, and Location as necessary.



NAV: Accept Transfer from
other Bureau or Region

Accept Transfer from Other Bureau or Region

Inventory Clerk

M > Mgmt > Maintain Inventory Assets

Maintain Inventory Assets

The screenshot shows a web browser window titled "Maintain Inventory Assets - asmn2010 (Page 1 of 2)". The form is titled "Inventory Assets" and contains the following fields and controls:

- Barcode # (highlighted in yellow)
- Barcode Type
- Existing interest asset
- Type
- Barcode #
- Released?
- Default Location*
- Copy to Location?
- Catalog Identifier*
- Commodity Asset
- Parents
- Children
- C/P/A
- Manufacturer
- Model Number
- Description
- Model Name
- Serial Number
- Drawing No.
- Initial Event
- User Fields*
- Asset Value*
- Acquisition Date
- Responsibility Date (highlighted in yellow)
- Asset Condition
- Effective Date
- Expected Return Date
- Utilization Code
- Flags*
- Activity Type
- Bureau or Region
- Property Accountability Office
- Cust Area
- Accepted?
- Property Custodian
- Contact ID
- Last Name*
- First
- Mid
- User
- Last Name*
- First
- Mid
- Location*
- Document*
- User Fields*
- Global User Fields*

At the bottom of the form, there are four buttons: "Page 2", "Commodity", "Comment / Picture / Attachment", and "Re-Request".

Below the form, a status bar displays: "The tracking identifier assigned to the interest asset" and "Record: 1/1".

1. Enter the barcode number of the asset you will be accepting in the **Barcode Number** field and **Tab**.

Result: The remainder of the property record auto-populates.

Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@ospssd3)

Exit Agree Contract Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

Barcode # Barcode Type Existing interest asset Type Barcode # Released? Y

Unique Name

Default Location*

Catalog Identifier* Commodity Asset Parents Children C/P/A

Manufacturer Model Number

Description Model Name

Serial Number Drawing No.

Initial Event User Fields*

Asset Value* Acquisition Date Responsibility Date

Asset Condition USED - MAJOR REPAIRS N Effective Date Expected Return Date

Utilization Code Flags* Activity Type

Bureau or Region Property Accountability Office

Cust Area Accepted? Y Prop Custodian

Contact ID Last Name* First Mid

User Last Name* First Mid

Location*

Document*

User Fields*

Global User Fields*

Page 2 Commodity Comment / Picture / Attachment Re-Request

2. Enter the accepting Bureau or Region in the **Bureau or Region** field to reflect the new Bureau or Region.
3. Change the Property Accountability Office in the **Property Accountability Office** field to reflect the new Property Accountability Office.
4. Change the Custodial Area in the **Cust Area** field to reflect the new Custodial Area.
5. Change the **Contact ID**, if necessary.
6. Change the **User Last Name** field to reflect new user, if necessary.
7. Double click the **Location** field to reflect the new location of the asset.
8. Update the **Site, Building and Room** fields.
9. Select the **Save** button from the toolbar to save the new location.
10. Select the **Save** button from the toolbar to save the accepted asset.

Result: The asset has been accepted and the new Bureau or Region and the other changes have been updated.

Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@ospssd3)

Exit Agree Contract Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

Barcode #	Barcode Type	Type	Barcode #	Released?
CDSAPS0003	<input type="checkbox"/>	Existing interest asset	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Unique Name				
Default Location*				
Catalog Identifier*	ITA-165397	<input type="checkbox"/> Commodity Asset	Parents <input type="checkbox"/> Children <input type="checkbox"/> C/P/A <input type="checkbox"/>	
Manufacturer	DELL INC.	Model Number	INSPIRON 3500	
Description	MICROCOMPUTER, RACKMOUNT	Model Name		
Serial Number		Drawing No.		
Initial Event	PURCHASE			
Asset Value*	\$3,500.00	User Fields*		
Asset Condition	4 USED - MAJOR REPAIRS N	Acquisition Date	09/08/2007	Responsibility Date 09/08/2007
Utilization Code	IN SERVICE	Effective Date	09/09/2007	Expected Return Date
Bureau or Region	55	Flags* S O	Activity Type	AGENCY OWNED
Cust Area	55001A002	Accepted? <input checked="" type="checkbox"/> Y	Property Accountability Office	55001A
Contact ID		Last Name*	First	Mid
User	269333	Last Name*	MCGRATH	CHRIS
Location*	WASHINGTON, DC _BUILDING _RONALD REAGAN _ROOM _B800			
Document*				
User Fields*				
Global User Fields*				

Page 2 Commodity Comment / Picture / Attachment Re-Request

End of activity.

Withdraw or Deny Transfer

The **Close Inventory Asset Requests** screen is used to withdraw or deny transfer requests.

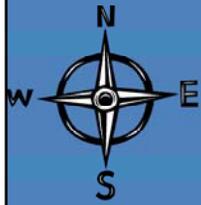
Area 1 Enter the barcode number of the asset in the **Barcode Number** field, then **Tab**.

Area 2 Deny or Withdraw the transfer request in this portion of the screen using the appropriate checkboxes.

Note 1: You may only withdraw transfers you have initiated.

Note 2: If you are withdrawing or denying several requests at once, first conduct a search using your custodial area; save each record, then scroll through the other records using the arrow keys, saving each time.

Note 3: Transfers can also be accepted through this screen, however they can only be accepted one asset at a time. To accept multiple assets, use the **Change Inventory Asset Information** screen.



NAV: Withdraw or Deny
Transfer Request

Withdraw or Deny Transfer

Inventory Clerk

M > Mgmt > Close Inventory Asset Requests

Close Inventory Asset Requests

The screenshot shows a web browser window titled 'Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@osppsd3)'. The browser address bar shows 'Close Inventory Asset Requests - asmn2040'. The main content area is titled 'Assets' and contains the following fields and options:

- Barcode # [Text Input]
- Manufacturer / Model / Official Name* [Text Input]
- Model Name [Text Input]
- Serial Number [Text Input]
- Drawing No. [Text Input]
- Legend:
 - A - Accept
 - D - Deny
 - W - Withdraw
- Form Fields with checkboxes:
 - A D W Custodial Area [Text Input]
 - A D W Prop Contact [Text Input]
 - A D W Current User [Text Input]
 - A D W Location [Text Input]
- Message [Text Input]

1. In the **Barcode Number** field, enter the barcode number of the asset to be transferred and **Tab** out of the field.

Result: The following fields will be autofilled based upon the decal number selected.

Field	Description
Manufacturer/Model/Official Name	The manufacturer, model number and official name of asset.
Model Name	The model name of the asset.
Serial Number	The serial number assigned by the manufacturer.
Drawing No.	The drawing number of the asset.

2. Select the appropriate checkbox next to each of the below rows.

Select:

- **D** to Deny
- **W** to Withdraw

Withdraw or Deny Transfer

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SF 4.5

Field	Description
Custodial Area	The applicable custodial area for the PC receiving the asset.
Property Contact	The name of the new property contact.
User	The name of the new user.
Location	Select this field to launch the Location sub-form.

3. Select the **Save** button from the toolbar to save your work.

Result: The transfer request is withdrawn/ denied.

4. Review the **Message** field at the bottom of the screen to ensure that the action (withdraw or deny) was successfully completed without errors.

Screenshot of Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSUR1@ospssd3) interface. The window title is "Close Inventory Asset Requests - asmn2040". The main content area is titled "Assets" and contains the following fields and controls:

- Barcode #: CDSAPS0004
- Manufacturer / Model / Official Name*: DELL INC. INSPIRON 3500 MICROCOMPUTER, RACKMOUNT
- Model Name: [Empty]
- Serial Number: [Empty]
- Drawing No.: [Empty]
- Radio buttons for A - Accept, D - Deny (selected), W - Withdraw
- Radio buttons for Custodial Area, Prop Contact, Current User, Location
- Message: Complete

End of activity.



Lab #1: Transfer your Inspiron Laptop Barcode # CD01MMDDYYXX (where MM=Month, DD=Day, YY=Year, and XX=your student number) to the custodial area 55002A013.

Lab #2: Generate the Report for Inventory Assets with Requests to identify assets being transferred to the custodial area assigned to you for training (see your Login Information card). Take note of the first two barcode numbers listed coming from **Current Custodial Code beginning with 55** – you will need them for the next lab.

Barcode #1: _____

Barcode #2: _____

Lab #3: Accept the first two barcode # for transfer from Custodial Area 55002A013 and update the custodial area to the one assigned to you for training (see your Login Information card). Update the Location as your current office.

Lab #4: Withdraw the transfer request for the asset from the first lab - Inspiron Laptop Barcode # CD01MMDDYYXX (where MM=Month, DD=Day, YY=Year, and XX=your student number).

Lesson Summary

- You should now be able to:
 - Summarize the steps used to transfer assets
 - Request a transfer
 - Generate a report to determine whether or not there are any open requests for transfers to your custodial code
 - Accept a transfer coming from within the same Bureau or Region
 - Accept a transfer for assets coming from outside the Bureau or Region for redeployment of excess assets
 - Withdraw a transfer request
 - Deny a transfer

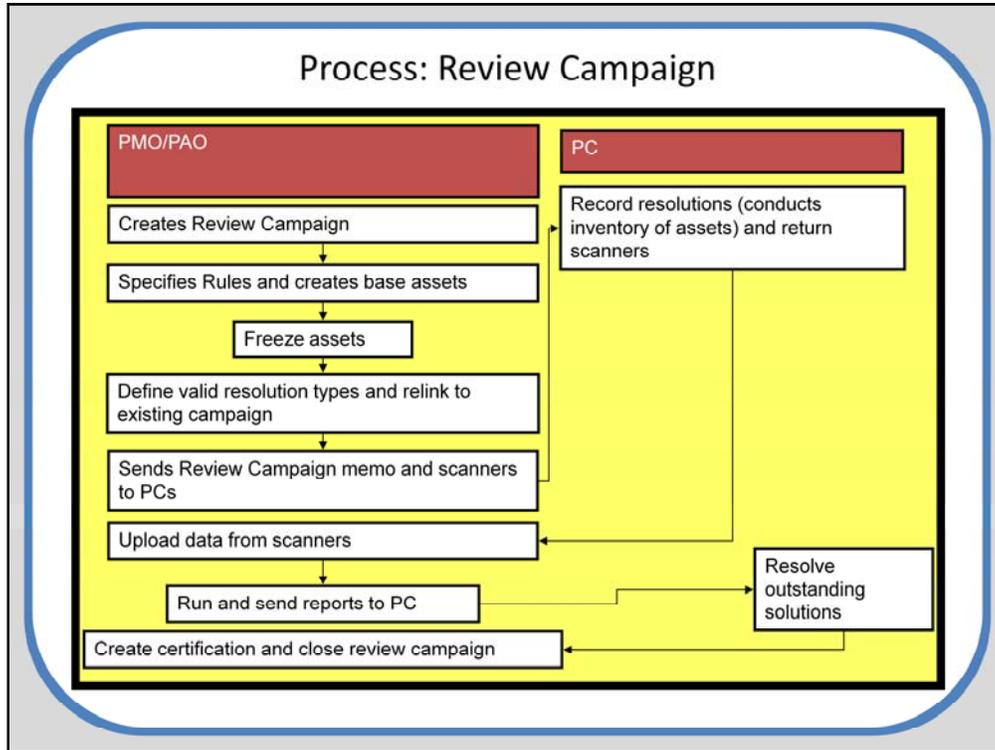


Chapter 8: Manage a Review Campaign (PMO and PAO)

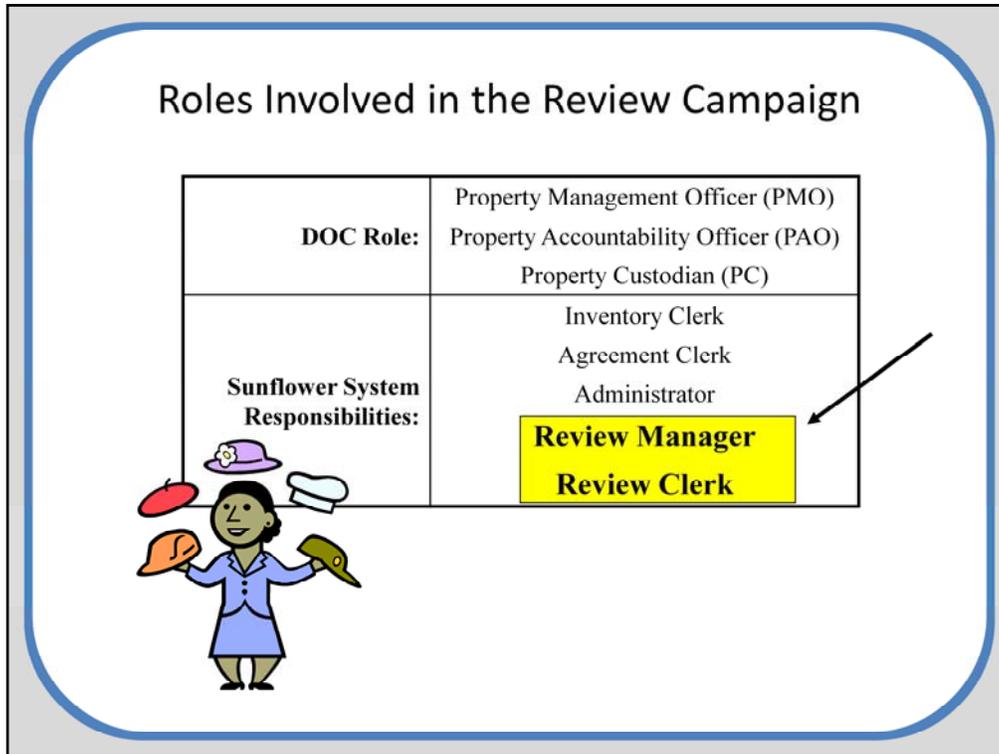
Sunflower Assets 4.5

Lesson Objectives

- After this lesson you should be able to:
 - Define Roles involved in a review campaign
 - Set up a review campaign
 - Use MobileTrak to upload data to scanners
 - Use MobileTrak to download data to Sunflower
 - Run reports to review campaign details and status
 - Close a review campaign



This chapter focuses on the role of the **PMO** and **PAO** during the review campaign.



PMOs will be set up as Review Managers and PAOs and PCs will be set up as Review Clerks.

Review Managers have access to and can manipulate the physical inventory process throughout the organization.

- Create
- Manage
- Close

Review Clerk can only perform management functions related to the review campaign for the custodial area to which they are assigned. The administrator must set at what level within DOC the Review Clerk can work with the assets.

Set up a Review Campaign

- Steps to setting up a review campaign:
 - Establish rules
 - Create a baseline of assets
 - Freeze the baseline of assets
 - Establish valid date ranges for the review campaign
 - Set up valid resolutions
 - Relink existing resolutions with review campaign

The PMO/PAO creates the review campaign in Sunflower.

Rules govern which assets will be included in the review campaign. DOC may include all assets or use rules to allow only a subset of assets to be inventoried. (For example, all capital assets or all assets within a particular bureau or region).

By creating and freezing a baseline of assets, the assets added to Sunflower after the freezing of the baseline, will not be included in the review campaign. This allows for a set inventory to search for rather than always aiming at a moving target.

Dates can be used to identify the start and expected end of the review campaign. They can also be used to establish when certain forms of resolutions will be accepted (e.g., barcode scanning of assets is available throughout the review campaign, but online resolution of assets is only available 30 days after the start of the review campaign).

Setting up valid resolutions states the ways in which assets will be reconciled with the review campaign. It is possible to allow certain roles to use some resolution types, while preventing others.

Create a Review Campaign

Review Campaigns

1 Name ... Frozen?

Sponsor

Campaign Type

2 Sample Type

Base Source

Audit of

Culminated by

3 Begin Date Expected End Date Actual End Date

User Fields*

Area 1: Name the review campaign and identify the sponsor (who's paying for the review campaign). The campaign type identifies Inventory (all assets currently active) or Inactive (assets in storage). DOC will only use the Inventory selection in the Campaign Type field.

Area 2:

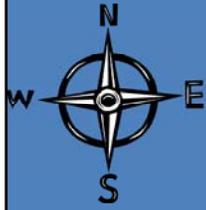
- Using the Population sample is comprehensive and allows for a complete inventory of all assets. Random Sample is used to audit a previous campaign.
- The base source identifies which assets from the Population or Random Sample to include. This screen identifies which of these methods will be used, but will be defined later.

Area 3:

- The **Begin Date** is the start of the review campaign. This can be the date it is being entered or a date in the future.
- The **Expected End Date** is the date the review campaign is scheduled to end.
- The **Actual End Date** is the date the review campaign ends. Leave blank until the review cycle is completed.

Best Practices Recommendation:

- Conduct a *Population* review thereby conducting a wall-to-wall inventory
- Include the year and Bureau or Region in the Review Campaign name



NAV: Create a Review Campaign

Create a Review Campaign

Review Manager
M > Review > Maintain Review Campaigns
Maintain Review Campaigns

The screenshot shows a web browser window titled "Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@osppsd3)". The browser's address bar shows "Maintain Review Campaigns - asrv2010". The main content area displays a form titled "Review Campaigns" with the following fields and controls:

- Name: Text input field
- Sponsor: Text input field
- Campaign Type: Text input field
- Sample Type: Text input field
- Base Source: Text input field
- Audit of: Text input field
- Culminated by: Text input field
- Begin Date: Text input field
- Expected End Date: Text input field
- Actual End Date: Text input field
- User Fields*: Text input field
- Frozen?: Check box
- Buttons: Comment, Freeze Status, Resolutions

1. Enter a unique **Name** for the Review Campaign.

Note: The naming convention for this field should be followed as YYYY_Bureau or Region_Specific Name (if any).

2. In the **Sponsor** field, use the LOV to select the name of the organization sponsoring the Review Campaign.

Note: Select the Bureau or Region Name.

3. In the **Campaign Type** field, use the LOV to select **Inventory** as the type of campaign being performed.
4. In the **Sample Type** field, use the LOV to select **Population**.

5. In the **Base Source** field, use the LOV to select **Rule Generated**.
6. Complete the following optional fields, if applicable (i.e. if auditing a prior Review Campaign):

Field Name	Description/Explanation
Audit of	Specify the name of a prior Campaign Review for which you are performing an audit.
Culminated by	Refers to the population campaign that will be used to validate this campaign. Use when the sample type = <i>random sample</i> .

7. Enter or select the **Begin Date** for the Review Campaign.
8. Enter or select the **Expected End Date** for the Review Campaign.
9. Select the **Save** button from the toolbar to save your work.

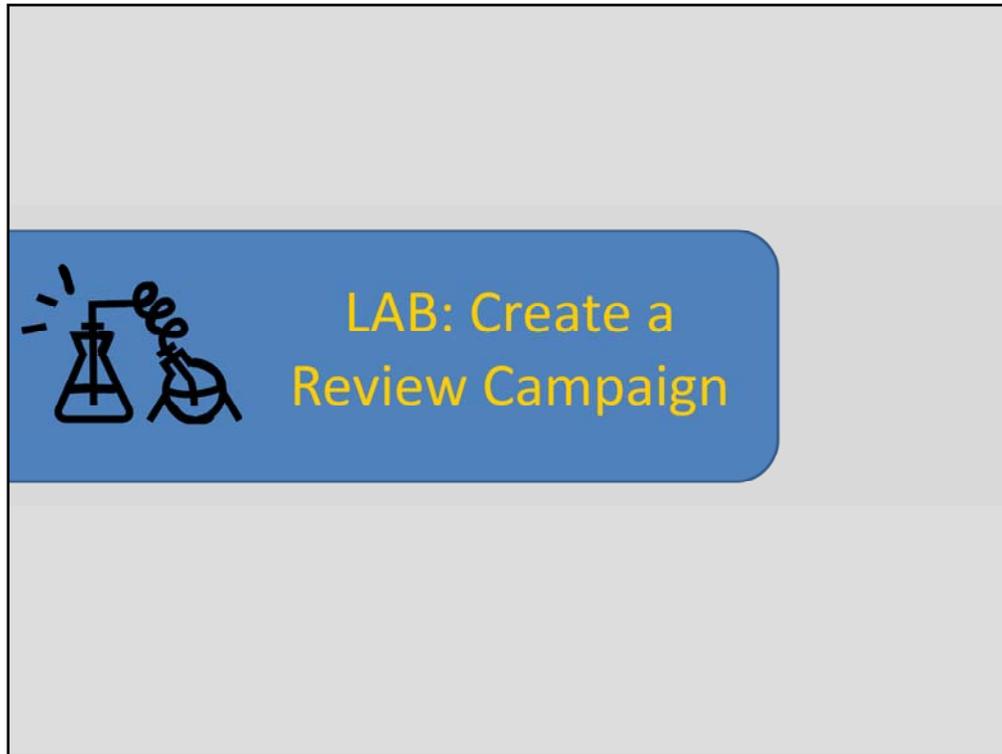
Result: The message field at the bottom of the screen will indicate the record is complete.

Example: Below is a complete **Maintain Review Campaigns** window:

End of activity.

Create a Review Campaign

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Create a Review Campaign with the following parameters:
Name = Type in Your Student ID number + today's date (e.g., Student0109152007)
Sponsor = ITA (or 55)
Campaign Type = Inventory
Sample Type = Population
Base Source = Rule Generated
Begin Date = 05/30/2009
End Date = 11/15/2009

Create a Baseline of Assets

The screenshot shows a software interface for creating a baseline of assets. It is divided into three main sections, each highlighted with a blue box and a large number:

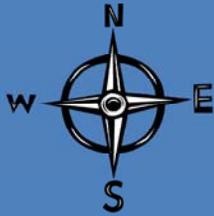
- Area 1 (Review Campaigns):** Contains fields for Name (SP2007), Sponsor (01-FIELD OFFICE), Sample Type (POPULATION), and Base Source (RULE GENERATED). There is also an Actual End Date field and buttons for 'Create Base' and 'Create SQL'.
- Area 2 (Base Rules):** Contains an Identifier field (SP2007-001) and buttons for 'Criteria' and 'Eree'.
- Area 3 (Base Rule Details - Criteria):** A table with columns for Attribute, Operator, and Operand. The first row is highlighted in yellow and contains 'ASSET VALUE', '>=', and '25000'.

- **Area 1:** This information was previously identified when creating the review. The **Maintain Review Base** form opens in query mode allowing the user to enter the name of the campaign and then select **Find**.
- **Area 2:** Each **Base Rule** will have its own unique identifier established by the user. There can be multiple base rules for a campaign. To enter additional base rules, use the **Insert Record** icon on the toolbar.
- **Area 3:** The **Base Rule Details** define the Base Rule. There may be multiple base rule details per base rule.

All conditions (Base Rule Details) for the Base Rule constitute an **AND**. If multiple Base Rules are used, they constitute an **OR**. For example if Base Rule #1 states asset value \geq 25000 AND custodial area = 50 then assets must meet **both** of those conditions to be included. However if Base Rule #1 states asset value \geq 25000 and Base Rule #2 states custodial area = 50 then assets may meet **either** of those conditions to be included.

Best Practices Recommendation:

- Include all inventory assets in the review campaign
- Establish the specific Bureau or Region here



NAV: Create a Baseline

Create a Baseline

Review Manager

M > Review > Maintain Review Base

Maintain Review Base

The screenshot shows a web browser window titled "Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@ospssd3)". The browser's address bar shows "Maintain Review Base - asrv2040". The main content area contains a form titled "Review Campaigns" with the following fields:

- Name:
- Sponsor:
- Sample Type:
- Base Source:
- Actual End Date:

There are two buttons on the right side of the form: "Create Base" and "Create SQL".

1. Enter the Review Campaign Name in the **Name** field.
2. Select the **Find** icon to execute the query.

Result: The review campaign properties autofill.

The screenshot shows the Sunflower Enterprise software interface. The title bar reads "Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@ospssd3)". The menu bar includes "Exit", "Agree", "Contract Mgmt", "Sentry", "Finance", "Inactive", "Excess", "Review", "IT Components", "Admin", "Reports", "Eunctions", "Utility", "Window", and "Help". The toolbar contains various icons for file operations and navigation.

The main window is titled "Maintain Review Base - asrv2040". It is divided into three sections:

- Review Campaigns:** Contains fields for "Name" (2007 ITA TRAINING), "Sponsor" (55001A), "Sample Type" (POPULATION), and "Base Source" (RULE GENERATED). There is an "Actual End Date" field and two buttons: "Create Base" and "Create SQL".
- Base Rules:** Contains an "Identifier" field and two buttons: "Criteria" and "Eree".
- Base Rule Details - Criteria:** A table with three columns: "Attribute", "Operator", and "Operand". The table has 8 rows, each with empty input fields.

3. Enter a unique Base Rule Identifier in the **Identifier** field.
4. In the **Attribute** field, enter or select **INTEREST ASSET TYPE**.
5. In the **Operator** field, enter or select the = sign.
6. In the **Operand** field, enter or select **INVENTORY ASSET**.
7. In the next blank **Attribute** field, enter or select **Manager**.
8. In the **Operator** field, enter or select the = sign.
9. In the **Operand** field, enter or select the **Bureau or Region**.

Note 1: This means that you are creating a review campaign for all assets assigned to the Interest Asset Type: Inventory Asset **and** a specific Bureau or Region (e.g., ITA).

10. Select the **Save** button from the toolbar to save your work.

Result: The assets to be included in the baseline have been selected.

11. Select the **Create Base** button.

Result: This will create a base for all assets assigned to you, and will also save the baseline.

Result: A pop-up window appears displaying how many baseline assets were created based on the Base Rules.

12. Select the **OK** button.

Example: Below is a complete **Maintain Review Base** window:

Attribute	Operator	Operand
INTEREST ASSET TYPE	=	INVENTORY ASSET
MANAGER	=	55

End of activity.



Search for and use the review campaign you created with the name **Student ID number + today's date** (e.g., Student0109152009). Create the baseline following the instructions in the NAV, Create a Baseline on the preceding pages.

Freeze or Unfreeze a Baseline of Assets

1

Review Campaigns

Name: SP2007

Sponsor: 01-FIELD OFFICE

Actual End Date

2

Base Frozen Statuses

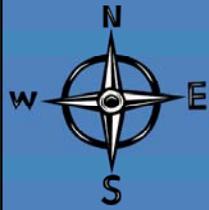
Datetime	Frozen?	Comment Display (Text Only)
09/03/2007 18:07:28	Y	

Comment

By freezing your campaign you are establishing a set inventory to easily identify lost assets and assets found during inventory. If you did not freeze your campaign your inventory would be a constant moving target. It may be necessary to unfreeze a campaign (for example, a change in the Base Rules) to add or remove inventory assets from your review campaign.

Area 1: This information was previously identified when creating the review. The **Maintain Base Frozen Status** form opens in query mode allowing the user to enter the name of the campaign and then select find.

Area 2: The **Datetime** defaults to the current date and time. This may be changed based on your review campaign parameters. Enter **Y** to freeze the base assets for the specified campaign. Enter a **N** to unfreeze assets. Always use a new line, do not change a line that has already been saved. Comments may be included as necessary.



NAV: Freeze or Unfreeze
Baseline Assets

Freeze or Unfreeze Baseline Assets

Review Manager

M > Review > Maintain Base Frozen Statuses

Maintain Base Frozen Statuses

Screenshot of the Sunflower Enterprise software interface showing the 'Maintain Base Frozen Statuses' screen. The window title is 'Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@ospssd3)'. The menu bar includes Exit, Agree, Contract, Mgmt, Entry, Finance, Inactive, Excess, Review, IT Components, Admin, Reports, Functions, Utility, and Window. The toolbar contains various icons for navigation and actions. The main content area is divided into two sections: 'Review Campaigns' and 'Base Frozen Statuses'. The 'Review Campaigns' section has fields for 'Name', 'Sponsor', and 'Actual End Date'. The 'Base Frozen Statuses' section has a table with columns for 'Datetime', 'Frozen?', and 'Comment Display (Text Only)'. The 'Datetime' column has six empty text boxes. The 'Frozen?' column has six checkboxes. The 'Comment Display' column has a large text area. A 'Comment' button is located below the table.

1. Enter the Review Campaign Name in the **Name** field.
2. Select the **Find** icon to execute the query.

Result: The remaining fields autopopulate.

If freezing this review campaign for the first time, goto task #3. Otherwise, goto task #4.

3. Enter a **Y** in the **Frozen?** field next to the first **Datetime** entry.

Goto task #5

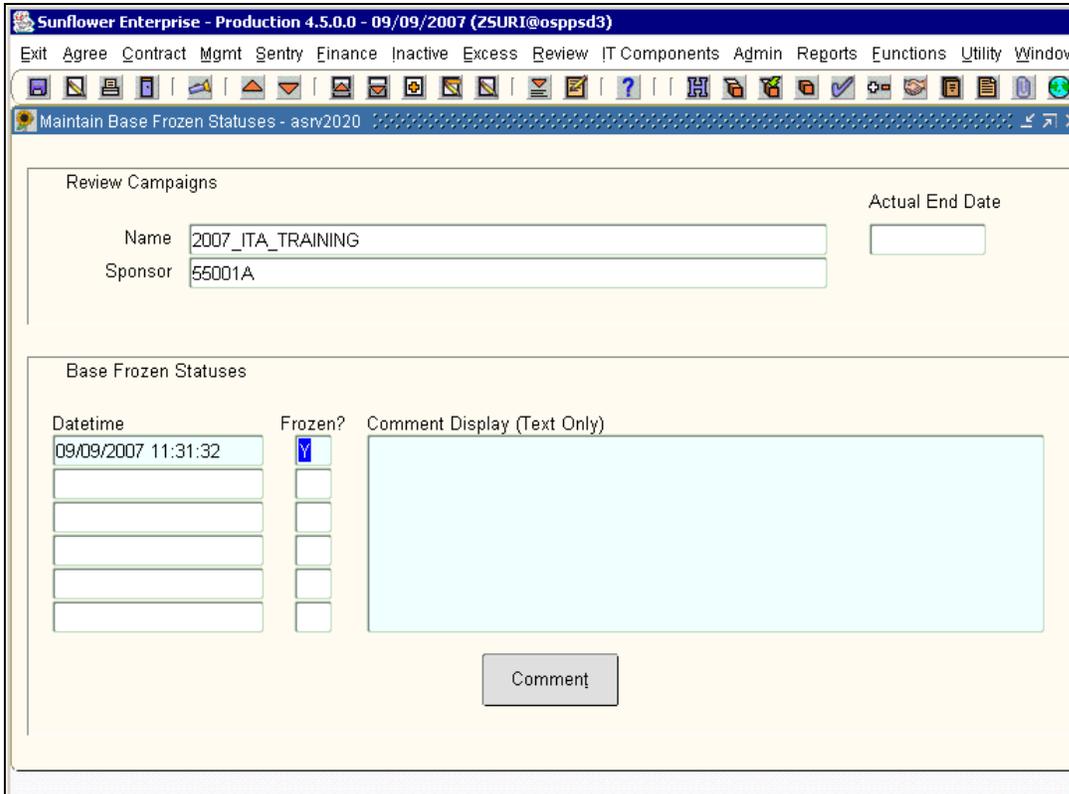
4. Whether Freezing or Unfreezing, under **Datetime**, select an empty row, then **Tab**.
 - To *Freeze* the base: Under **Frozen**, select **Y**.

- To *Unfreeze* the base: Under **Frozen**, select **N**.

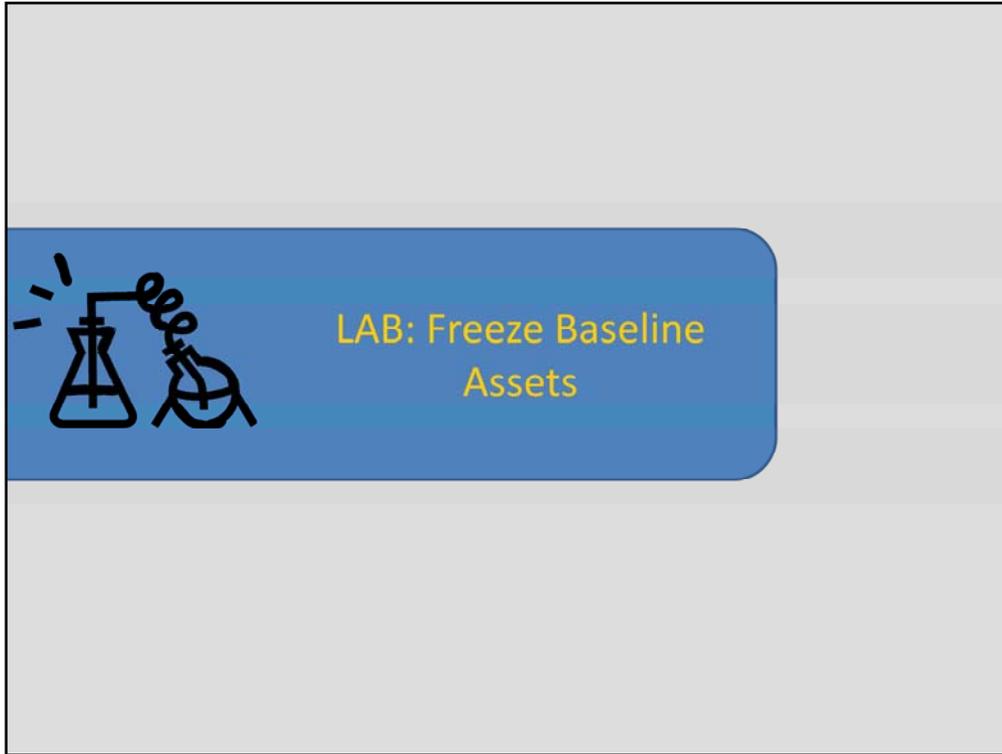
5. Select the **Save** button from the toolbar to save the record.

Result: The message on the status bar displays that the record was saved successfully.

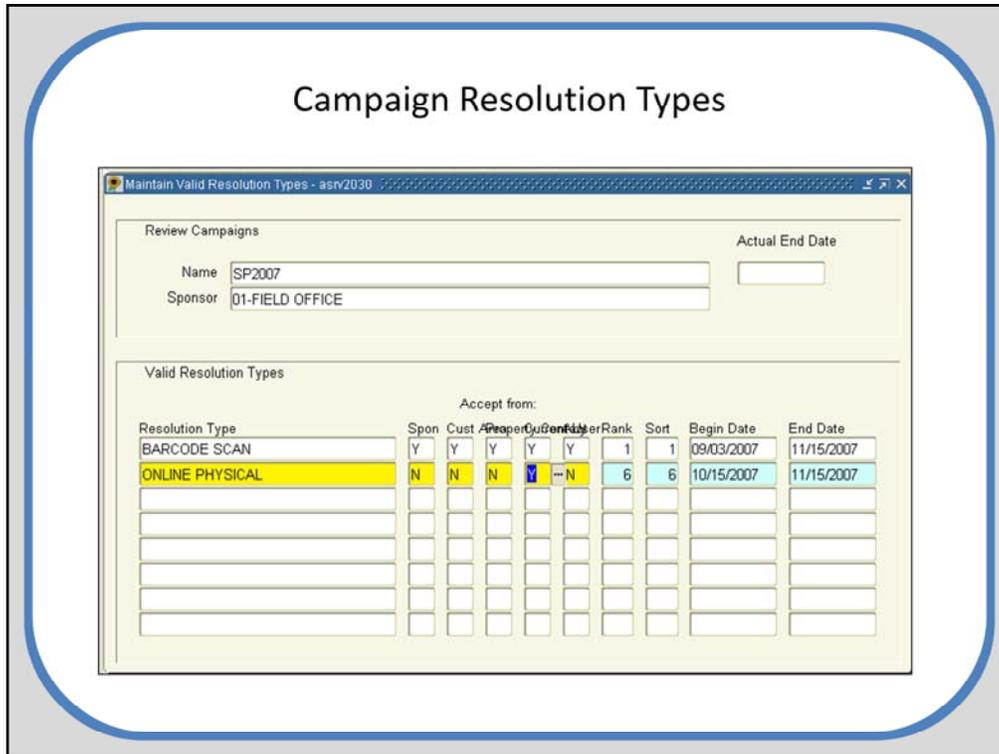
Example: Below is a sample of a completed **Maintain Base Frozen Statuses** window:



End of activity.



Freeze the baseline assets for the review campaign you created with the name **Student ID number + today's date** (e.g., Student0109152009).



The PMO/PAO determines which resolution types are valid for the review campaign.

- Barcode Scan – physically find and scan the asset
- Barcode Key – physically find the asset and key in the barcode
- Confirmed Unaccounted – indicates asset not in your possession (transfer, repair, etc.)
- Declared Unaccounted – remove an open item from the reporting cycle
- Online Declarative – know the asset exist but cannot see it (orbiting satellite)
- Online Physical – can not scan asset but can see and attest to physical location
- Excess Asset Initial Event – when an excess asset is created
- Inventory Asset Final Event – when an asset is given a final event (e.g., retired)

For each resolution type used at the Department of Commerce, you will need to establish:

- **Accept From:** Identifies which user may use this resolution type during the review (e.g., every user may use the Barcode Scan, but only the PC can do Online Physical resolutions)
- **Rank:** Defaults to 1. If using more than one resolution type, ranking resolutions helps determine which type takes precedence over another.
- **Sort:** Determines the order of which the resolutions appear in a report.
- **Begin Date and End Date:** Defines the date range during which the resolution type is acceptable. For example, Barcode Scans are acceptable throughout the inventory campaign, but Online Physical is only acceptable for the last 30 days of a review campaign.

Campaign Resolution Types

Valid Resolution Types									
Accept from:									
Resolution Type	Spon	PC	Cntct	Current	Abser	Rank	Sort	Begin Date	End Date
BARCODE SCAN	Y	Y	Y	Y	Y	1	1	10/01/2006	09/30/2007
BARCODE KEY	Y	Y	Y	N	N	999	999	10/01/2006	09/30/2007
ONLINE DECLARATIVE	Y	Y	N	N	N	7	7	04/01/2007	09/30/2007
ONLINE PHYSICAL	Y	Y	Y	N	N	6	6	01/01/2007	09/30/2007
DECLARE UNACCOUNTED	Y	N	N	N	N	3	3	07/01/2007	09/30/2007
CONFIRMED UNACCOUNTED	Y	N	N	N	N	4	4	07/01/2007	09/30/2007
EXCESS ASSET INITIAL EVENT	Y	Y	Y	Y	Y	7	7	10/01/2006	09/30/2007
INVENTORY ASSET FINAL EVENT	Y	Y	Y	Y	Y	7	7	10/01/2006	09/30/2007

The above screen shot shows the best types of resolutions to select when conducting a review campaign. Note that not all users are allowed to enter all types of resolutions and the date range is also limited for some resolution types. It is a good idea to allow all users the ability to scan and allow scanned assets to be accepted throughout the campaign.



NAV: Enter Valid
Resolution Types

Enter Valid Resolution Types

Review Manager

M > Review > Maintain Valid Resolution Types

Maintain Valid Resolution Types

Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@osppsd3)

Exit Agree Contract Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window

Maintain Valid Resolution Types - asrv2030

Review Campaigns

Name

Sponsor

Actual End Date

Valid Resolution Types

Accept from:

Resolution Type	Spon	PC	Cntct	Current	Absen	Rank	Sort	Begin Date	End Date
<input type="text"/>									
<input type="text"/>									
<input type="text"/>									
<input type="text"/>									
<input type="text"/>									
<input type="text"/>									
<input type="text"/>									
<input type="text"/>									

1. Enter the Review Campaign Name in the **Name** field.
2. Select the **Find** icon from the toolbar to execute the query.

Result: The Sponsor populates.

3. Select the **Resolution Type** field in the Valid Resolution Types section.

Note: The **Resolution Types** outline the types of resolutions, or finds, that are acceptable for the assets in your Review Campaign base.

4. Select a **Resolution Type** from the LOV and **Tab** to the next field. The following table describes the types of resolutions:

Field	Description	Required?
BARCODE SCAN	An asset is given this resolution type when the item's decal is scanned using the barcode reader. This is an automatic process.	Yes
BARCODE KEY	An asset is given this resolution type when the item's decal number is manually keyed into the scanner (barcode may be damaged, for example.) This is an automatic process.	Yes
ONLINE DECLARATIVE	An asset is given this resolution type when you cannot see the asset but know it to exist (e.g., a satellite in orbit).	Yes
ONLINE PHYSICAL	An asset is given this resolution type when you cannot scan an asset but you can see and attest to the location of where it exists. You must provide a location in this case. This must be a manual entry.	Yes
DECLARED UNACCOUNTED	An asset is given this resolution type when the asset needs to be removed from the inventory.	
CONFIRMED UNACCOUNTED	An asset is given this resolution type when the item is confirmed to be out of your possession. This must be a manual entry.	Yes
EXCESS ASSET INITIAL EVENT	An asset is given this resolution type when an excess asset is created.	Yes
INVENTORY ASSET FINAL EVENT	An asset is given this resolution type when an asset is accepted as a final event. (e.g., an asset is retired).	Yes

Note: Additional **Resolution Types** can also be selected if needed.

5. **Tab** to the next field.
6. Use the **Accept from:** fields to update the people resolutions will be accepted from to accord with the following table:

Resolution Type	Spon	PC	Contact	User	Any
BARCODE SCAN	Y	Y	Y	Y	Y
BARCODE KEY	Y	Y	Y	Y	Y
ONLINE DECLARATIVE	Y	Y	N	N	N
ONLINE PHYSICAL	Y	Y	Y	N	N
DECLARE UNACCOUNTED	Y	N	N	N	N
CONFIRMED UNACCOUNTED	Y	N	N	N	N
EXCESS ASSET INITIAL EVENT	Y	Y	Y	Y	Y
INVENTORY ASSET FINAL EVENT	Y	Y	Y	Y	Y

7. Enter the first date the resolutions will be accepted in the **Begin Date** field.

Note: If a begin date is not selected, any resolutions from previous Review Campaigns could be linked to the current Review Campaign.

Note 2: Barcode Scan, Barcode Key, Excess Asset Initial Event, and Inventory Asset Final Event should be accepted for the duration of the Review Campaign. The remaining resolution types should be limited in their duration, usually after allowing a minimum of three months for an initial review period.

8. Select the **Save** button from the toolbar to save your work.

Note: The message on the status bar will indicate that the record was successfully saved.

Example: Below is an example of a completed **Maintain Valid Resolution Types** window:

Review Campaigns

Name: 2007_ITA_TRAINING
Sponsor: 55001A

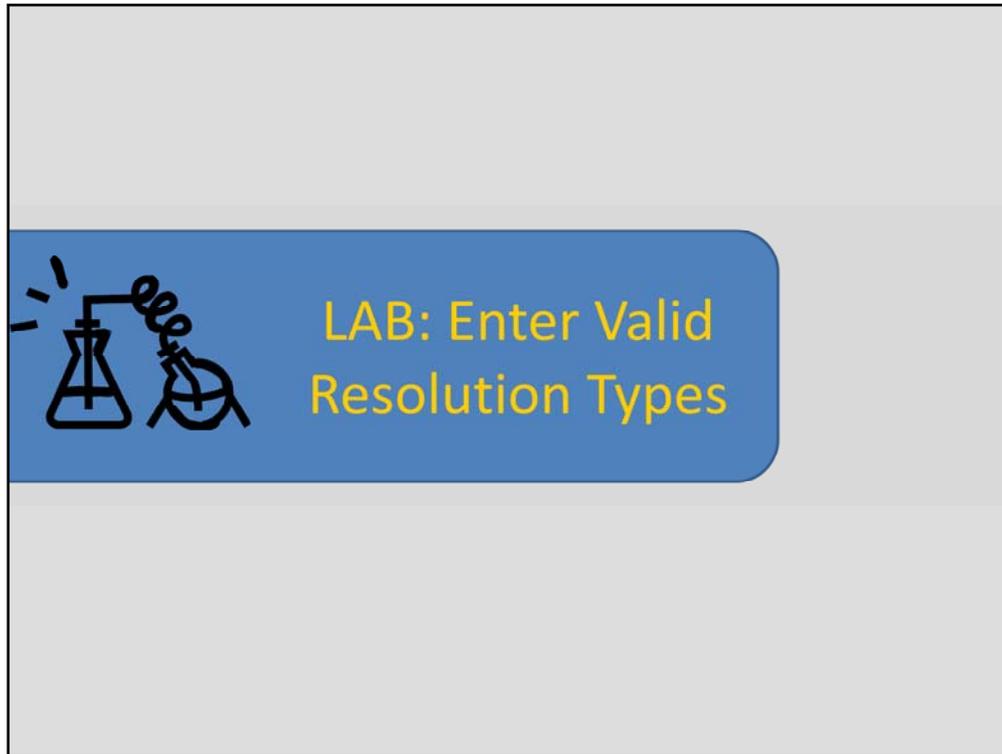
Actual End Date:

Valid Resolution Types

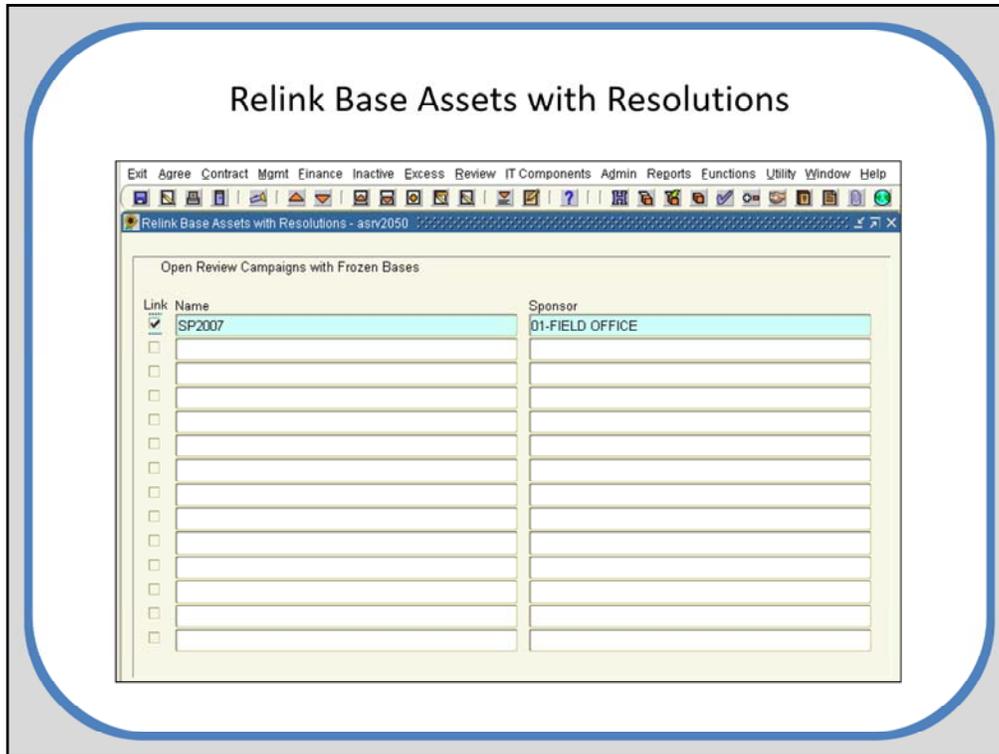
Accept from:

Resolution Type	Spon	PC	Cntct	Current	Abs	Rank	Sort	Begin Date	End Date
BARCODE SCAN	Y	Y	Y	Y	Y	1	1	10/01/2007	09/30/2008
BARCODE KEY	Y	Y	Y	N	N	999	999	10/01/2007	09/30/2008
ONLINE DECLARATIVE	Y	Y	N	N	N	7	7	04/01/2008	09/30/2008
ONLINE PHYSICAL	Y	Y	Y	N	N	6	6	01/01/2008	09/30/2008
DECLARE UNACCOUNTED	Y	N	N	N	N	3	3	07/01/2008	09/30/2008
CONFIRMED UNACCOUNTED	Y	N	N	N	N	4	4	07/01/2008	09/30/2008
EXCESS ASSET INITIAL EVENT	Y	Y	Y	Y	Y	7	7	10/01/2007	09/30/2008
INVENTORY ASSET FINAL EVENT	Y	Y	Y	Y	Y	7	7	10/01/2007	09/30/2008

End of activity.

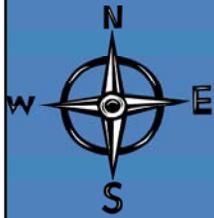


Create Valid Resolution Types for the review campaign you created with the name **Student ID number + today's date** (e.g., Student0109152009).



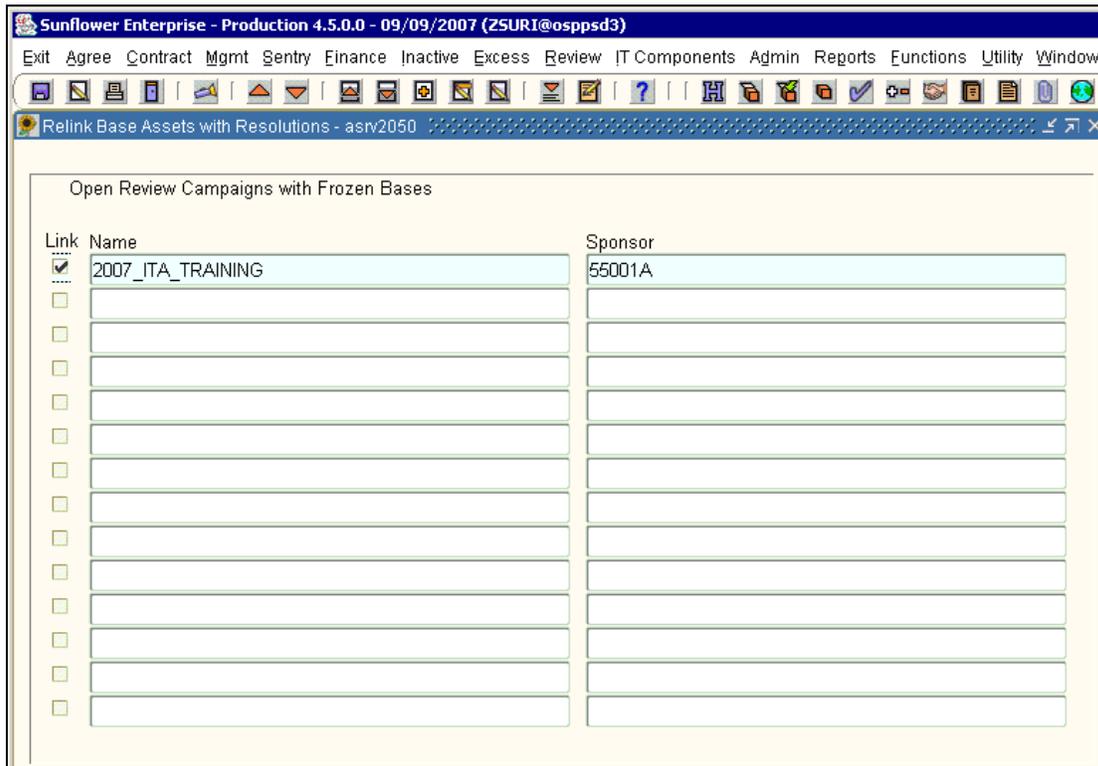
Every time a base is frozen OR anything on the valid resolution types is changed then you should relink any resolutions for that review campaign. Re-linking resolutions accounts for any resolutions that already exist for the base of the review campaign but are not associated (linked) with that review campaign.

Any new resolution that is created is checked against the valid resolution types of each review campaign that the asset is a part of its base. If the asset is part of the base of a review campaign and if the resolution type, date and recorded by are valid according to the rules of the valid resolution types of a review campaign then that resolution will be automatically linked with that review campaign. But any old resolution that is already recorded in the past and is valid based on the valid resolution types of a review campaign will not be linked with that review campaign until you do the relink step.



NAV: Relink Base Assets with Resolutions

Example: Below is a sample window of campaigns with relinked resolutions:



End of activity.



Relink the base assets with resolutions for the review campaign you created with the name **Student ID number + today's date** (e.g., Student0109152009).

Memo to PCs

- Includes the Review Campaign Plan
- Begin and End Dates of the Review Campaign
- Dates that each campaign resolution type (barcode scan, online resolution) will be accepted
- Some PCs will also receive a barcode scanner

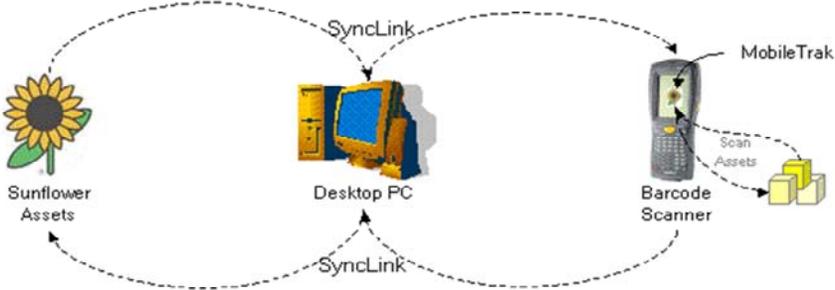
Sunflower MobileTrak™

- Sunflower Assets inventory management tool.
- Deployed via a fully integrated barcode reader that records and delivers asset information to your Sunflower Assets database.
- Supports the physical inventory (review) process in multiple locations whether the assets are located in one building, across town, or across the country.

MobileTrak includes all of the files needed to perform a physical inventory with your barcode scanner. It is downloaded with all of DOC's asset data which includes values in the List of Values fields. Identification of an asset for physical inventory begins by defining a review campaign in Sunflower Assets. Once the campaign is defined, the data is downloaded from Sunflower Assets to the scanner. The scanner can then be used to locate and scan the asset's barcode, the asset identifier.

Barcode Scanner Software Suite

- Sunflower SyncLink™ runs on your PC and transfers data from the server to the scanner and from the scanner back to the server.
- Sunflower MobileTrak™ runs on your scanner and is used to collect inventory data.
- Sunflower Bar Code Installer is used to install SyncLink™ and MobileTrak™.



MobileTrak™ - Overview

- Transfer Asset Records (SFA to the Scanner)
- Setup MobileTrak
- Create Resolutions (Scan and Key)
- Transfer Resolutions (Scanner to SFA)

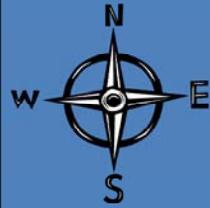
MobileTrak - Download and Upload Assets

- Before you begin to use MobileTrak you will need to download reference data; consisting of lookups, reference files, and assets from your Sunflower Assets database to your barcode scanner.
- After all assets have been scanned, the data will then be uploaded back to Sunflower.



Inventory asset data is downloaded to the barcode scanners including all values in the LOVs which allows users to update information using the scanners as they are conducting the Review Campaign.

The scanned asset information uploaded to Sunflower is used to compare what was scanned to the assets in the Review Campaign. This information is used to generate reports detailing any errors with scanning assets, identifying any assets found during inventory, and provide a listing of assets still unaccounted for.



NAV: Send Asset Records to Scanner

Send Asset Records to Scanner

Review Manager

I > SyncLink > MobileTrak

Sunflower SyncLink

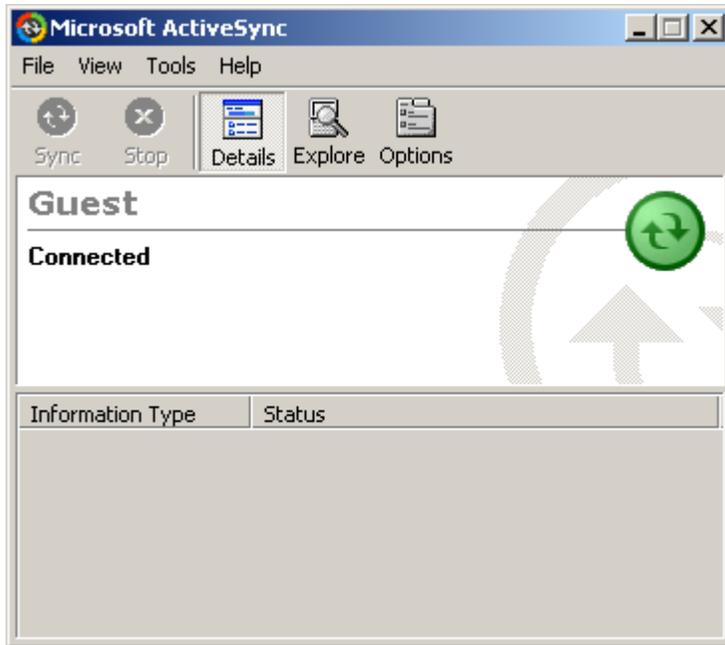
1. Place the scanner in its cradle.

Result: A dialog box for **Microsoft ActiveSync** appears, as shown in the example below:



2. Select **Guest Partnership**.
3. Select **Next**.
4. Review the **Microsoft ActiveSync** dialog box to ensure that you are connected.

Example: Below is a sample of this connection:

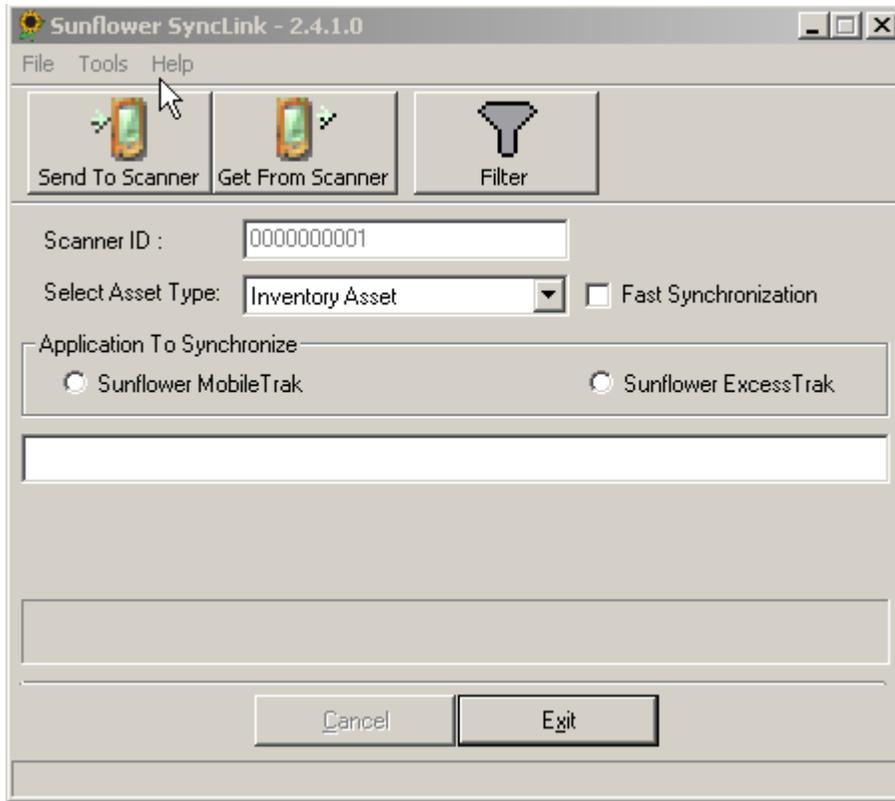


5. Select the **Minimize** button to minimize the window.
6. Select the **Synclink icon** on your desktop.



7. Enter your login information.

Result: The Sunflower **Synclink** window appears, as shown in the example below:

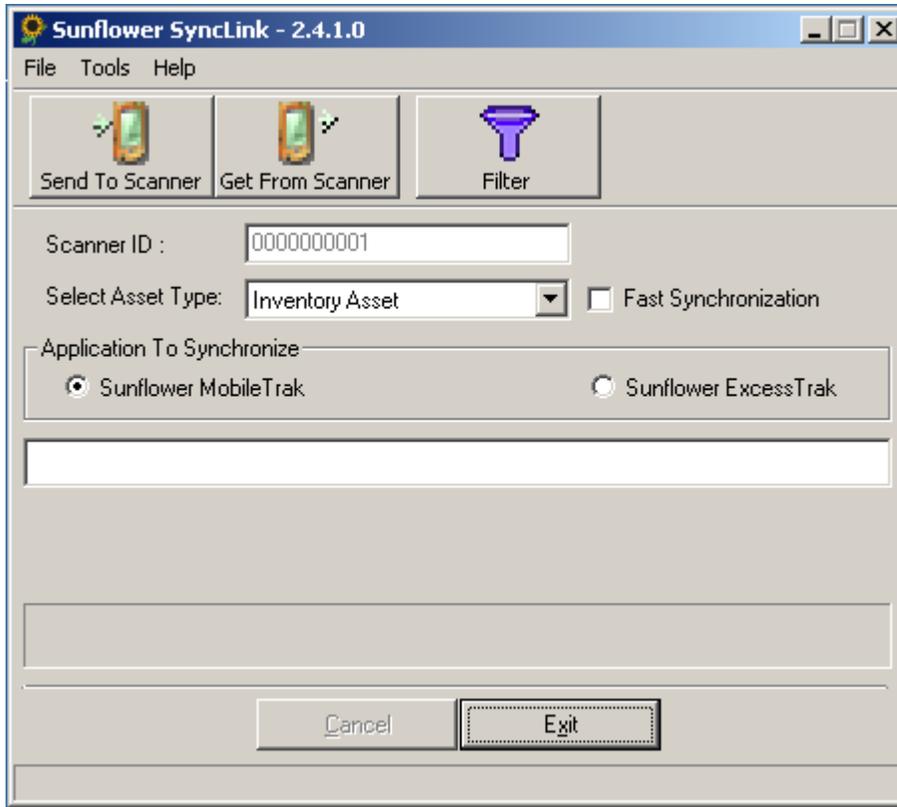


8. In the **Select Asset Type:** field, select **Inventory Asset**.
9. In the **Application to Synchronize** section of the screen, select **Sunflower MobileTrak**.
10. Select the **Filter** button.

Result: The SyncLink – Download Filter window is displayed.

11. Select the **Review Campaigns** tab.
12. Select the name of the Review Campaign whose assets you wish to send to the scanner.
13. Select the **Apply** button.
14. Select the **OK** button.

Result: The SyncLink Download filter window is closed and you are returned to the Sunflower SyncLink main window.



Note: The **Filter** button is now enabled indicating a filter is being used.

15. Select the **Send to Scanner** button to begin uploading the reference files of assets from the Sunflower Assets database based on the filter criteria selected.

Result: The window will display the progress. When completed, a window will appear indicating the download is complete.

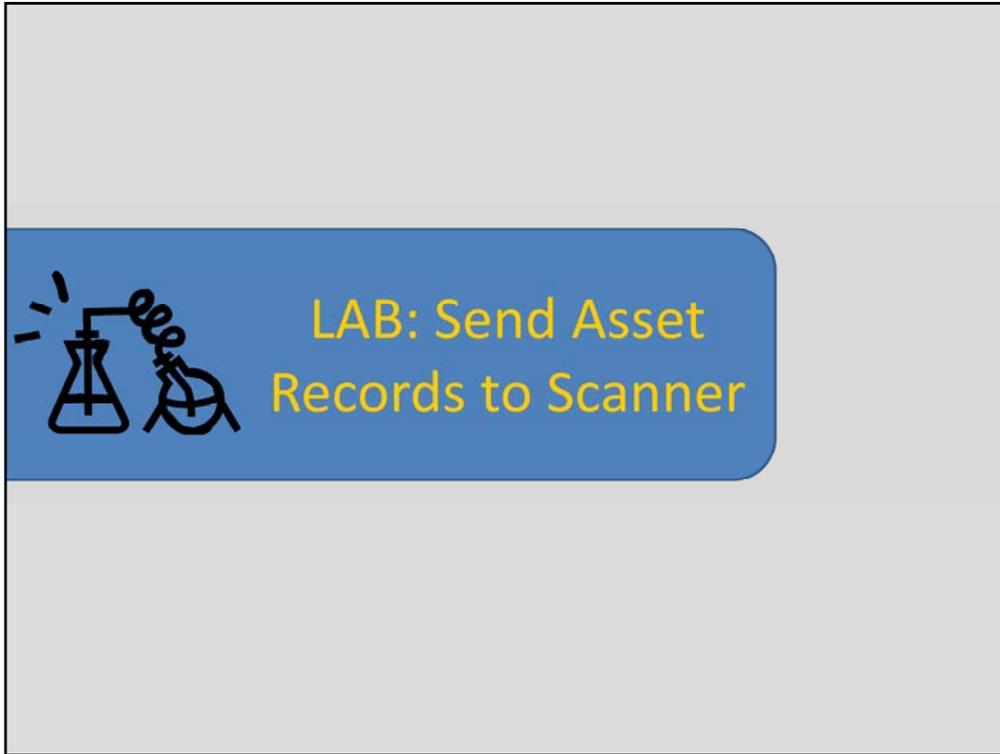


16. Select the **OK** button.
17. To validate the downloading of the assets to the scanner, refer to NAV document *Validate Review Campaign Base Assets*.

Note: The number of assets in MobileTrak should be equal to or greater than the number of assets in the Review Campaign Base Assets report. If it is greater than the number in the report, it means that some new asset records are pending in the

inventory assets interface table either because they were never processed or because there was some error.

End of activity.



Check with your instructor to determine if scanners are available for conducting this Lab.



NAV: Upload Resolutions from Scanner

Upload Resolutions from Scanner

Review Manager
I > SyncLink
Sunflower SyncLink

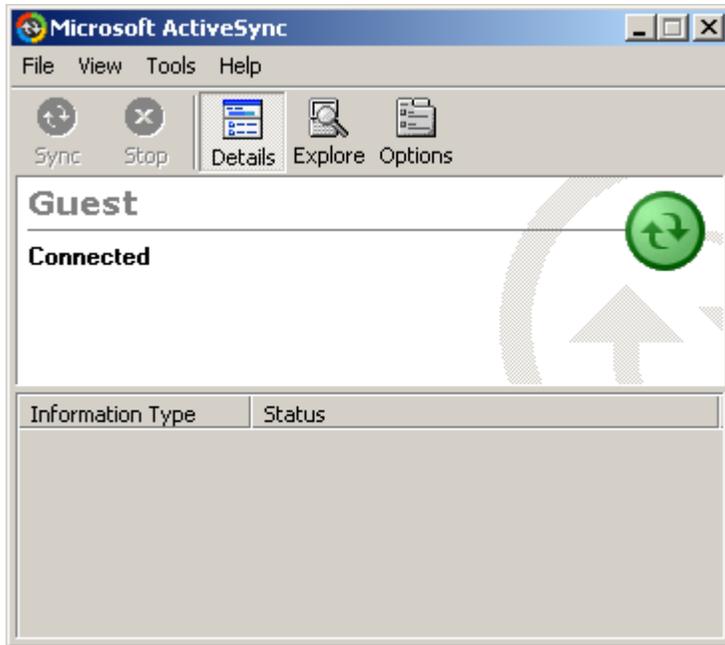
1. Place the scanner in its cradle.

Result: A dialog box for **Microsoft ActiveSync** appears, as shown in the example below:



2. Select **Guest Partnership**.
3. Select **Next**.
4. Review the **Microsoft ActiveSync** dialog box to ensure that you are connected.

Example: The screen shot below shows an example of being connected:

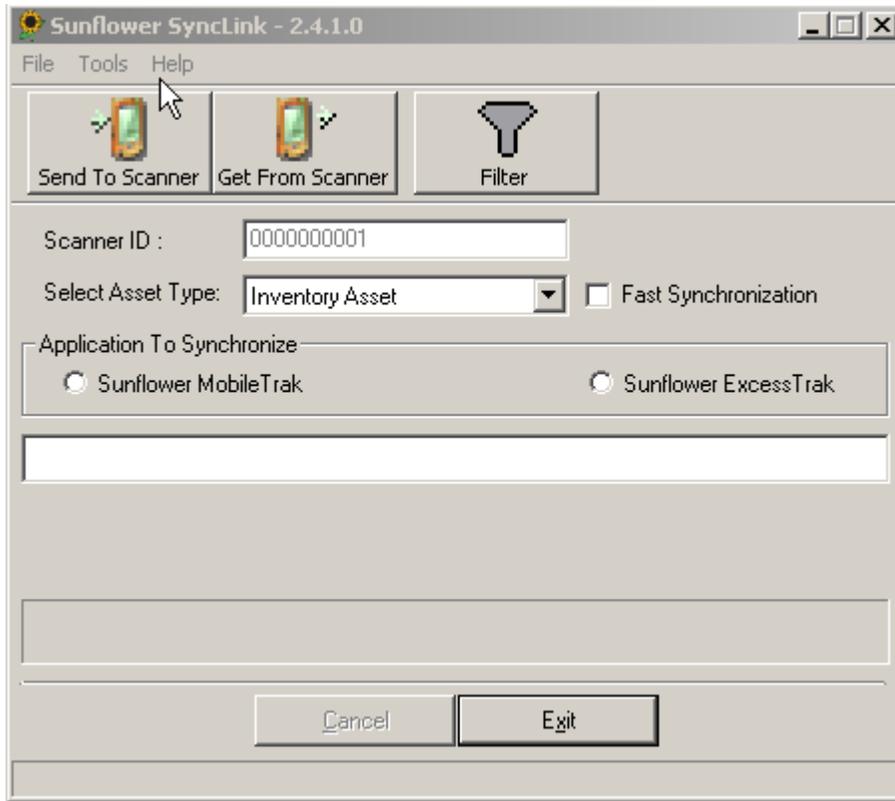


5. Select the **Minimize** button to minimize the window.
6. Select the **Synclink icon** on your desktop.

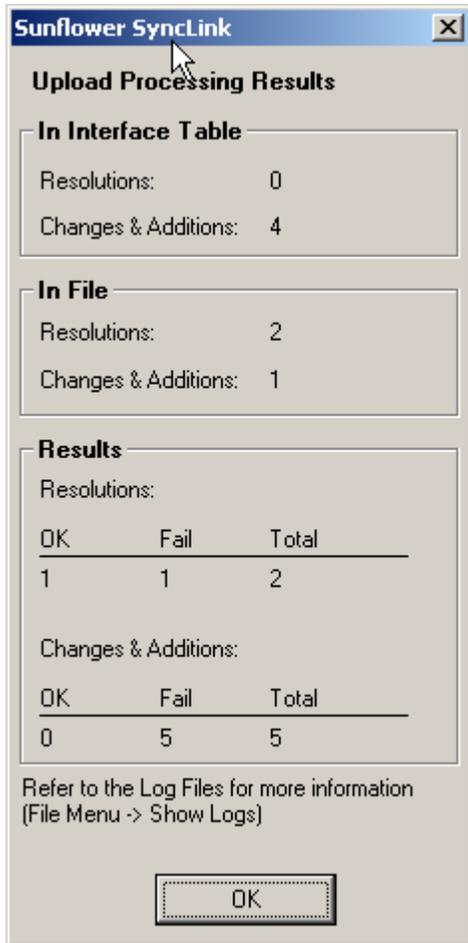


7. Enter your login information.

Result: The Sunflower **Synclink** window appears, as shown in the example below:



8. Select the **Sunflower MobileTrak** radio button.
9. Select the **Get From Scanner** button to begin uploading the files of assets from MobileTrak into the Sunflower Assets database.
10. When the upload is complete, **SyncLink** generates and displays an **Upload Processing Results** screen for verification, as shown in the example below.



- **In Interface Table** shows records pending processing in the interface table prior to loading from the scanner.
- **In File** shows records that will be transferred from the scanner into the interface table.
- **Results** shows results of processing *all* records in the interface table, which includes all existing interface records prior to loading from scanner and the records loaded from the scanner.

11. When asked if you would like to **Delete Upload Files from Barcode Reader**, select **Yes**, as shown in the example below.

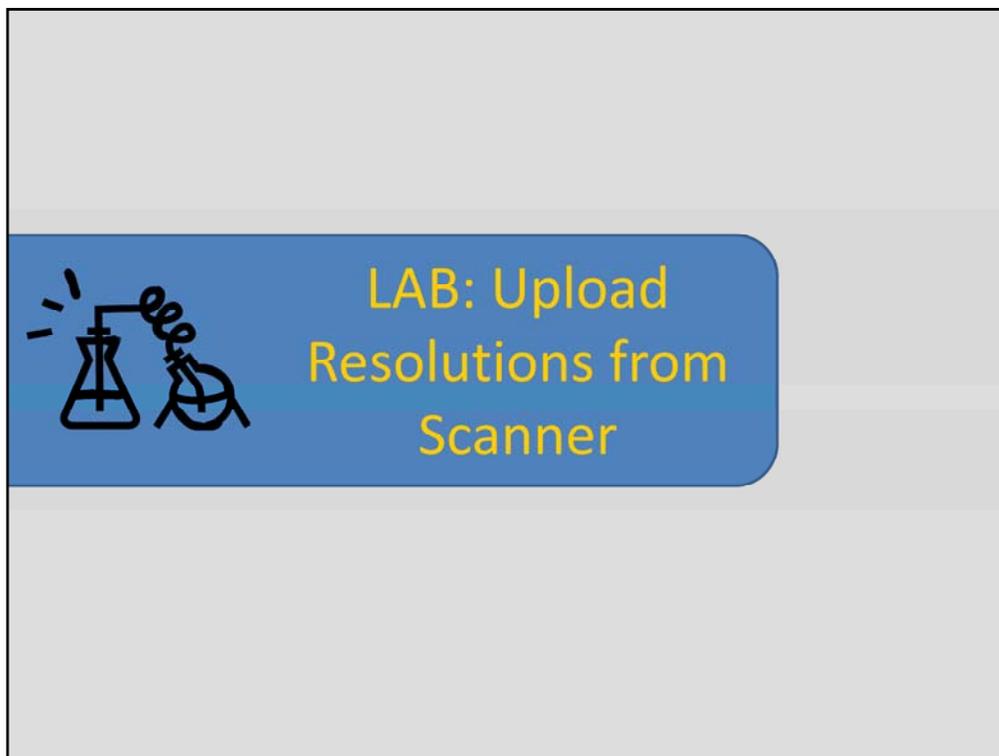


12. When told to **Restart MobileTrak**, select **OK**, as shown in the example below.



13. When told to **Upload Processing Results**, select **OK**.

End of activity.



Check with your instructor to determine if scanners are available for conducting this Lab.

Review Scanned Resolutions

- Goal: to have all resolutions accepted
- Three primary reasons why a scanned resolution will fail:
 - New asset not created successfully and is sent to auxiliary resolution table
 - One of the location fields was entered incorrectly (site or building)
 - Person entering resolutions incorrectly entered their ID

Run this report based on the scanner code and after the data from the scanner has been transferred (uploaded) to Sunflower.



NAV: Review Resolution Interface Processing Results

Review Resolution Interface Processing Results

Review Manager

M > Review > Review Reports

Review Reports

Sunflower Enterprise Sunflower Enterprise - Production 4.5.0.0

ASRV6000 Review Reports

To run a report, click one of the links below.

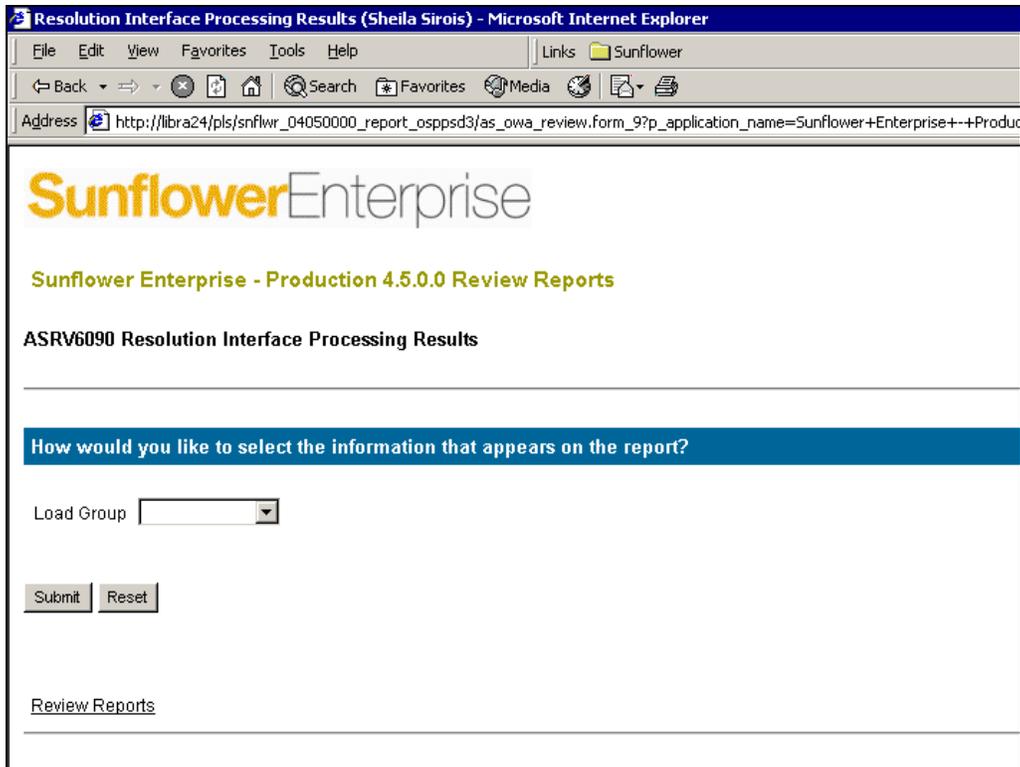
Base Asset Interface Processing Results	Review Campaign Base Assets
Current Resolutions at Different Location than Asset	Review Campaign Base Assets with Resolution Information
Executive Review Resolution Summary	Review Campaign Properties
Resolution Interface Processing Results	Review Resolution Summary
Review Accruals	Review Resolution Summary by Person

[Previously Run Report](#)

[Reports Main Menu](#)

1. Select **Resolution Interface Processing Results**.

Result: The **Resolution Interface Processing Results** parameters window displays:

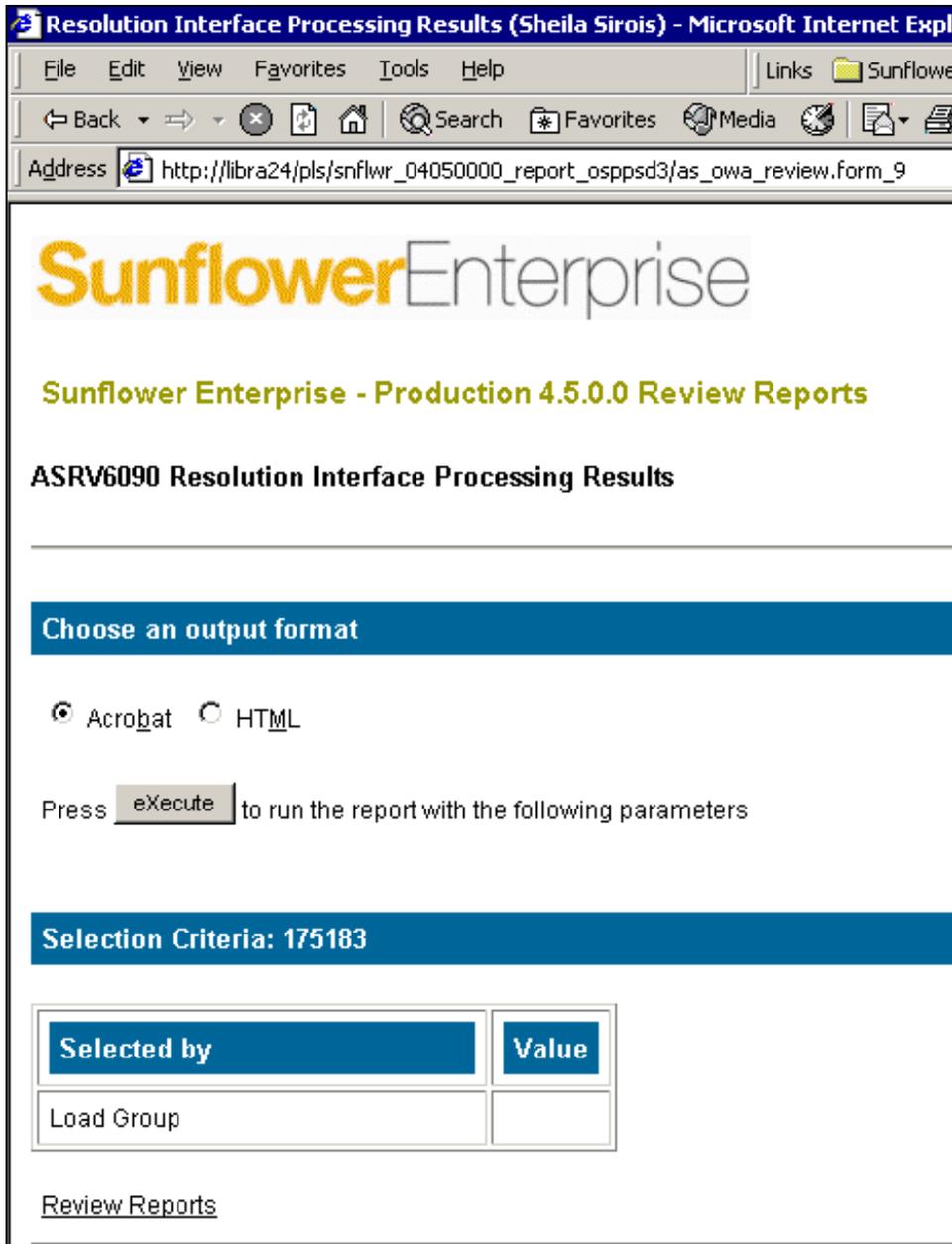


2. In the **Load Group** lookup list, select the Load Group number with the following format: **RS<Scanner ID>**.

Note: To view the results from all scanners, leave the **Load Group** field blank.

3. Select **Submit**.

Result: A window displays that allows you to review the report parameters:



4. Select the **Acrobat** radio button.
5. Select **eXecute**.

Result: The report displays in a separate window, allowing you to review the resolution interface processing results.

Sunflower Assets		Resolution Interface Processing Results		Page 2 of 4
ASRV6090				11/15/2005 18:41
RS0000000001 : RS0000000001				
Record Group	Date	Result		
11-1051102103751	11/03/2005 14:35:38	OK (Identifier:INV - 7.1.1.STEP11-1 Type:Date/Time:11/02/2005 10:27:51 Site:CAMPUS Stlvl 1:BUILDING 10 Stlvl 2:ROOM 123 Stlvl 3:)		
Success Total		1		
Record Group	Date	Result		
Failure Total		0		
Record Group	Date	Result		
Unmatched Total		0		
Load Group Total		1		

Note: See below for an explanation of the report features:

- The first group shows the resolution records that were processed successfully.
- The second group shows the failed resolution records that could not be processed due to some error. Any errors should be investigated and fixed accordingly.
- The third group shows the unmatched resolution records that are stored in as_auxiliary_load_resolutions table to be processed later on when the found asset is successfully created in Sunflower Asset.

End of activity.



LAB: Review
Resolution Interface
Processing Results

Check with your instructor to determine if scanners are available for conducting this Lab.

Review Campaign Reports

- Review Campaign Base Assets with Resolution Information
- Report of Assets Found During Inventory

Review Campaign Base Assets with Resolution Information - review all base assets for the selected Review Campaign with open resolutions that were not found during the inventory to date

Inventory Asset Interface Processing Results – review all assets that were found during inventory. Run report based on Inventory plus the scanner identifier

Review Campaign Base Assets with Resolution Information

Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
INV X201	S	COMPUTER PORTABLE	APPLE	M555	111111	0	4,400.00 01/01/1995
Manager : JONFLOWER SYSTEMS Owner : JONFLOWER SYSTEMS Steward : ASSET CENTER XX Custodian : FRASIER TIMOTHY H 05167 User : Location : SAN FRANCISCO BUILDING : K2 ROOM : 1809							
Review Campaign: XE2004 Resolution: ONLINE DECLARATIVE Created by : TRAINER SYSTEMS ADMIN Authorized by : TRAINER SYSTEMS ADMIN Just. Level :							
INV X204	S	COMPUTER PERSONAL	DELL	E333	4010X	0	4,950.00 04/01/1994
Manager : JONFLOWER SYSTEMS Owner : JONFLOWER SYSTEMS Steward : ASSET CENTER XX Custodian : DOE JOHN 050599 User : Location : LIVERMORE BUILDING : E ROOM : 1222							
Review Campaign: XE2004 Resolution: ONLINE DECLARATIVE Created by : TRAINER SYSTEMS ADMIN Authorized by : SMITH STEVEN X BEEK Just. Level : IP ADDRESS VERIFIED							
INV X202	S	COMPUTER PERSONAL	DELL	E333	11119W	0	3,800.00 05/01/1994
Manager : JONFLOWER SYSTEMS Owner : JONFLOWER SYSTEMS Steward : ASSET CENTER XX Custodian : FRASIER TIMOTHY H 05167 User : Location : SAN FRANCISCO BUILDING : K2 ROOM : 1809							
Review Campaign: XE2004 Resolution: ONLINE PHYSICAL Created by : TRAINER SYSTEMS ADMIN Recorded by : SMITH STEVEN X BEEK Location : SAN FRANCISCO BUILDING : G ROOM : 1234XX							
INV X205	S	SEDAN	FORD MOTOR COMPANY	Taurus	222W	0	24,800.00 01/01/1990
Manager : JONFLOWER SYSTEMS Owner : JONFLOWER SYSTEMS Steward : ASSET CENTER XX Custodian : XX CUSTODIAN OUTXK User : Location : LIVERMORE BUILDING : F							
Review Campaign: XE2004 Resolution: ONLINE PHYSICAL Created by : TRAINER SYSTEMS ADMIN Recorded by : TRAINER SYSTEMS ADMIN Location : LIVERMORE BUILDING : G ROOM : 200							

PMO/PAOs will run this report and hand it off to the PCs conducting the review campaign. The report identifies all assets not found and still requiring inventory. The PC will review the report and attempt to find the missing data by either using the scanner or completing an Online Resolution (explained in chapter 8).

PMO/PAO will run the report with the following information:

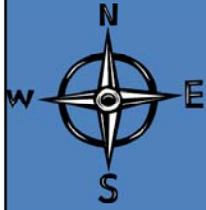
Review Campaign: Specify the Review Campaign name

Interest Type: select Inventory Assets

Resolution Type: Select Open

Group by: Custodial Area (so that you may give each custodial area their specific information).

Sort by: Location, Current User and Descriptives



NAV: Review Campaign
Base Assets with
Resolution Information

Review Campaign Base Assets with Resolution Information

Review Manager

M > Review > Review Reports

Review Reports

The screenshot shows a Microsoft Internet Explorer browser window titled "Review Reports (Sheila Sirois) - Microsoft Internet Explorer". The address bar contains the URL: http://libra24/pls/snflwr_04050000_report_osppsd3/as_owa_review.main?p_session=F3BBF29E8F5D40D8C794C4F704F36A06FEBAD96B36E4. The page header displays the Sunflower Enterprise logo and the version "Sunflower Enterprise - Production 4.5.0.0". Below the header, the text "ASRV6000 Review Reports" is visible. A blue banner contains the instruction "To run a report, click one of the links below." Below this banner is a grid of links:

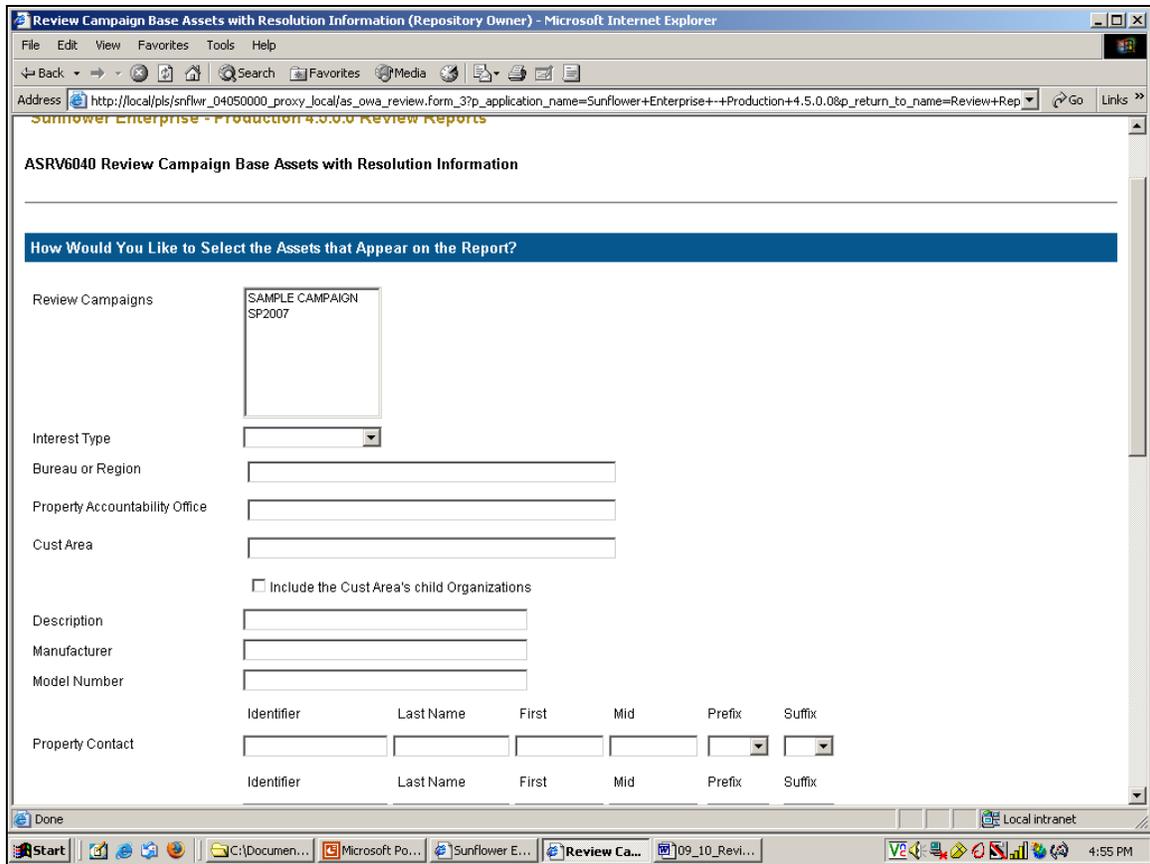
Base Asset Interface Processing Results	Review Campaign Base Assets
Current Resolutions at Different Location than Asset	Review Campaign Base Assets with Resolution Information
Executive Review Resolution Summary	Review Campaign Properties
Resolution Interface Processing Results	Review Resolution Summary
Review Accruals	Review Resolution Summary by Person

Below the grid are two additional links:

- [Previously Run Report](#)
- [Reports Main Menu](#)

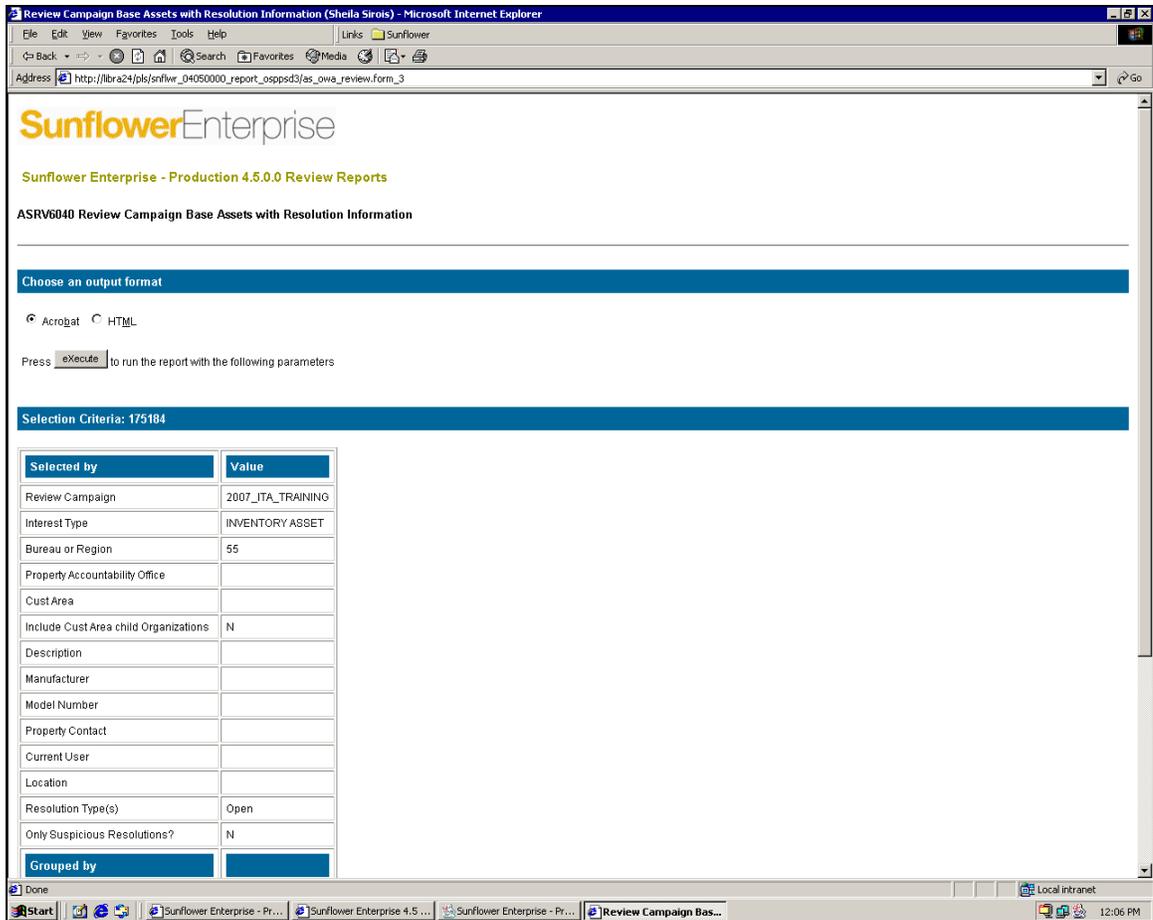
1. Select the **Review Campaign Base Assets with Resolution** link.

Result: The query criteria window is displayed.



2. Select the Review Campaign in the **Review Campaign** field.
3. Select the **Interest Type** from the pull down menu on which to report.
4. Complete the remaining fields as desired.
5. Group the assets as you desire using the **How Would You Like the Assets to be Grouped?** pull down menu.
6. Select the **Submit** button to run the report.

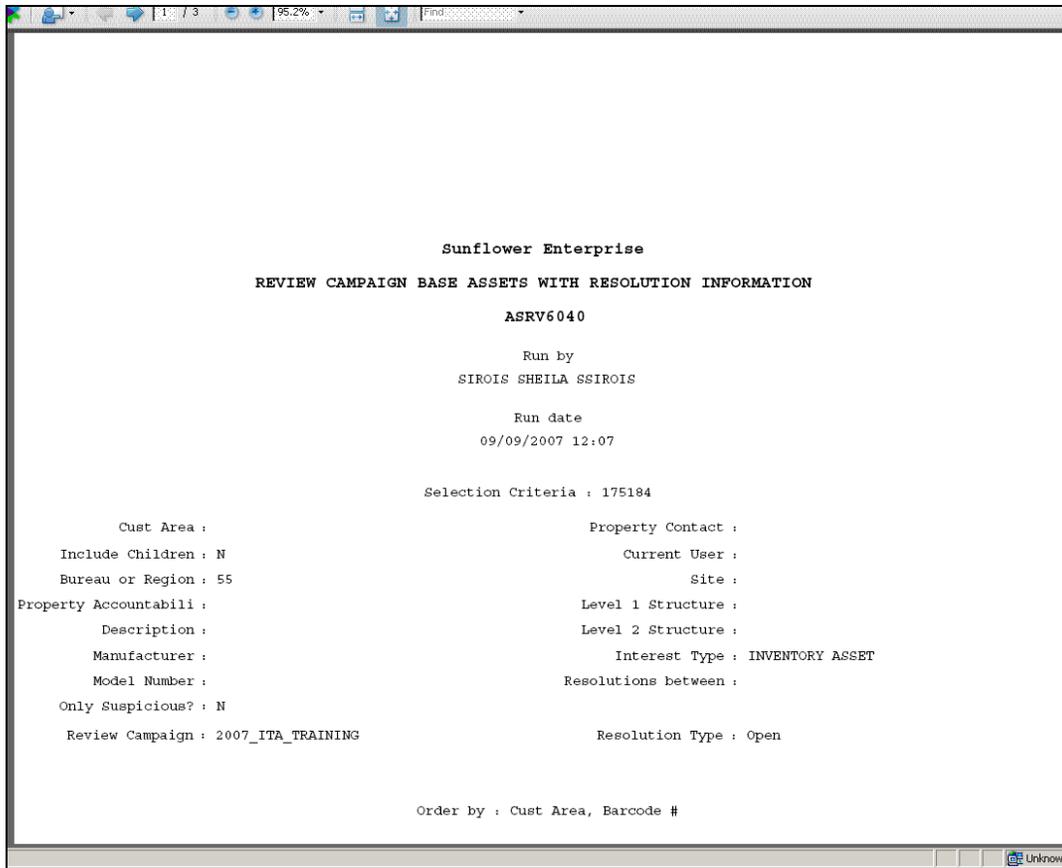
Result: The review screen appears.



7. Select the **Acrobat** radio button.
8. Select the **eXecute** button to run the report.

Result: The report displays.

Below is a complete **Review Campaign Base Assets with Resolution Information** report:



End of activity.



Run the report for the review campaign you created with the name **Student ID number + today's date** (e.g., Student0109152009).



NAV: Generate Report of
Assets Found During
Inventory

Generate Report of Assets Found During Inventory

Review Manager

M> Mgmt > Management Reports

Management Reports

SunflowerEnterprise Sunflower Enterprise - Production 4.5.0.0

ASMN6000 Management Reports

To run a report, click one of the links below.

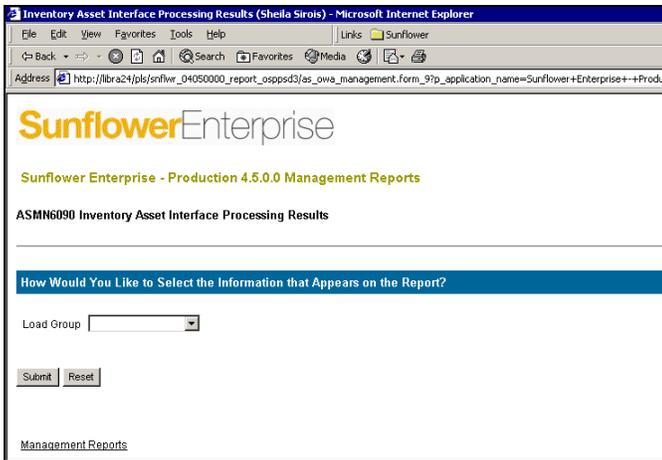
Inventory Assets (Global Information)	Inventory Asset Summary by Asset Flag
Asset Search	Inventory Asset Summary by Asset Type
Asset Structure	Inventory Asset Timeline
Inventory Asset Activity Summary by Asset Flag	Inventory Asset Utilization
Inventory Asset Activity Summary by Asset Type	Inventory Assets Pending Acceptance by Age
Inventory Asset Final Events	Inventory Assets Pending Release by Age
Inventory Asset History	Inventory Assets with Recently Denied Requests
Inventory Asset Initial Events	Inventory Assets with Requests
Inventory Asset Interface Processing Results	Purchase Order Aging Report
Inventory Asset Ongoing Events	High Volume Shipping Interface Processing Results

[Previously Run Report](#)

[Reports Main Menu](#)

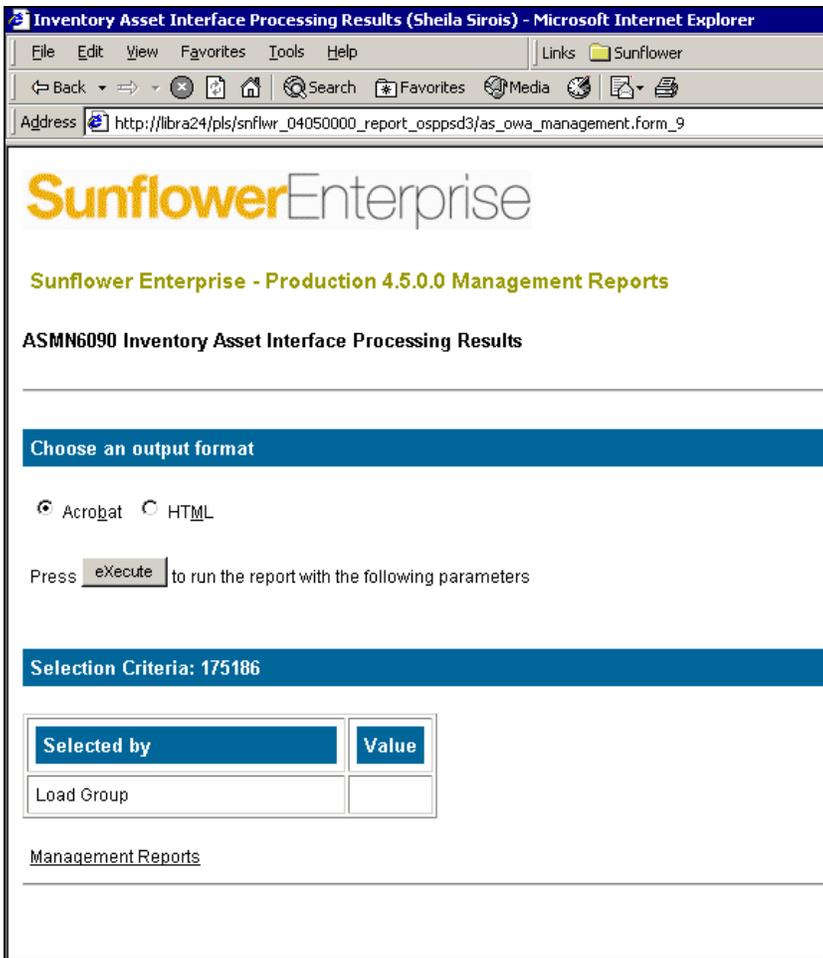
1. Select **Inventory Asset Interface Processing Results**.

Result: The **Inventory Asset Interface Processing Results** parameters window displays:



2. In the **Load Group LOV**, select the Load Group number.
3. Select **Submit**.

Result: A window displays that allows you to review the report parameters:



4. Select the **Acrobat** radio button.

Generate Report of Assets Found During Inventory
 Sunflower Systems © 2009, All Rights Reserved
 SF 4.5

5. Select **eXecute**.

Result: The report displays in a separate window, allowing you to review the results of the inventory asset interface processing.

The Report is sorted as follows:

- The first group shows the found inventory assets that were created successfully.

- The second group shows the failed inventory asset records that could not be created due to some error.

End of activity.

Campaign Certification

- Letter to PC
- Includes number of assets found
- Includes number of assets missing
- PC reviews and verifies information and signs certification

Closing Review Campaigns

The screenshot shows a web browser window titled "Maintain Review Campaigns - asr2010". The main content area is titled "Review Campaigns" and contains the following fields:

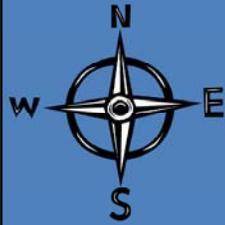
- Name: SP2007
- Sponsor: 01-FIELD OFFICE
- Campaign Type: INVENTORY
- Sample Type: POPULATION
- Base Source: RULE GENERATED
- Audit of: (empty)
- Culminated by: (empty)
- Begin Date: 09/03/2007
- Expected End Date: 11/15/2007
- Actual End Date: 11/25/2007
- User Fields*: (empty)

Additional elements include a "Frozen?" checkbox with a checked "Y" value, and three buttons at the bottom: "Comment", "Freeze Status", and "Resolutions".

Closing a campaign is the final step in the review cycle. This occurs after all assets in your baseline have been accounted for, outstanding assets have been declared, and the report of survey is reconciled.

To end the review campaign, specify the **Actual End Date**. This date may be equal to, earlier or later than the Expected End Date.

Closing a Review Campaign does not prohibit an asset from being inventoried after the end of the campaign. If an asset is found after the review campaign closes, the PC may still use the online resolution form to inventory the asset.



NAV: Close Review Campaigns

Close Review Campaigns

Review Manager
M > Review > Maintain Review Campaigns
Maintain Review Campaigns

Screenshot of the Sunflower Enterprise software interface showing the 'Maintain Review Campaigns' window. The window title is 'Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@osppsd3)'. The menu bar includes Exit, Agree, Contract, Mgmt, Entry, Finance, Inactive, Excess, Review, IT Components, Admin, Reports, Functions, Utility, and Window. The toolbar contains various icons for navigation and actions. The main area is titled 'Review Campaigns' and contains several input fields: Name, Sponsor, Campaign Type, Sample Type, Base Source, Audit of, Culminated by, Begin Date, Expected End Date, Actual End Date, and User Fields*. There is also a 'Frozen?' checkbox. At the bottom, there are three buttons: 'Comment', 'Freeze Status', and 'Resolutions'.

1. Select the **Find** icon from the toolbar.
2. Enter the Review Campaign Name in the **Name** field that you want to close.
3. Select the **Find** icon from the toolbar.

Result: The screen populates.

4. Enter the closing date in the **Actual End Date** field.
5. Select the **Save** icon from the toolbar to close the Review Campaign.

Result: The Review Campaign will be closed.

Example: Below is a complete **Maintain Review Campaigns** window:

Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@osppsd3)

Exit Agree Contract Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Hel

Maintain Review Campaigns - asrv2010

Review Campaigns

Name: 2007_ITA_TRAINING Frozen? Y

Sponsor: 55001A

Campaign Type: INVENTORY

Sample Type: POPULATION

Base Source: RULE GENERATED

Audit of: _____

Culminated by: _____

Begin Date: 09/01/2007 Expected End Date: 09/30/2008 Actual End Date: 09/30/2008

User Fields*: _____

Comment Freeze Status Resolutions

End of activity.



Complete this lab AFTER you have completed all the labs in Chapter 8: Conduct a Review Campaign (PC)

Close the review campaign that you created with the name **Student ID number + today's date** (e.g., Student0109152009).

Enter the closing date of 11/30/2009.

(Note: Typically you would not enter the actual end date until that date. However for the purposes of training, we will leave the review campaign open until after all classes so that PCs may complete the labs in Chapter 8 in later training sessions.)

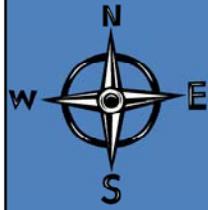
Review Campaign Reports

- Review the details of the review campaign
- Review percentage of assets found, open, and declared unaccounted
- Review a summary of assets by resolution type
- Review campaign assets with resolutions

Running reports at the end of a review campaign will list all assets included in the campaign and their status.

- Review Campaign Properties – displays details of the campaign parameters, (e.g., setup, base rules, and valid resolution types)
- Review Resolution Summary – displays open and found assets and how they were found
- Executive Review Resolution Summary – summary of the progress of your review campaign and status
- Review Campaign Base Assets with Resolution Information – check the box to include suspicious resolutions to view assets that were retired (the steps for this report are included earlier in the chapter)

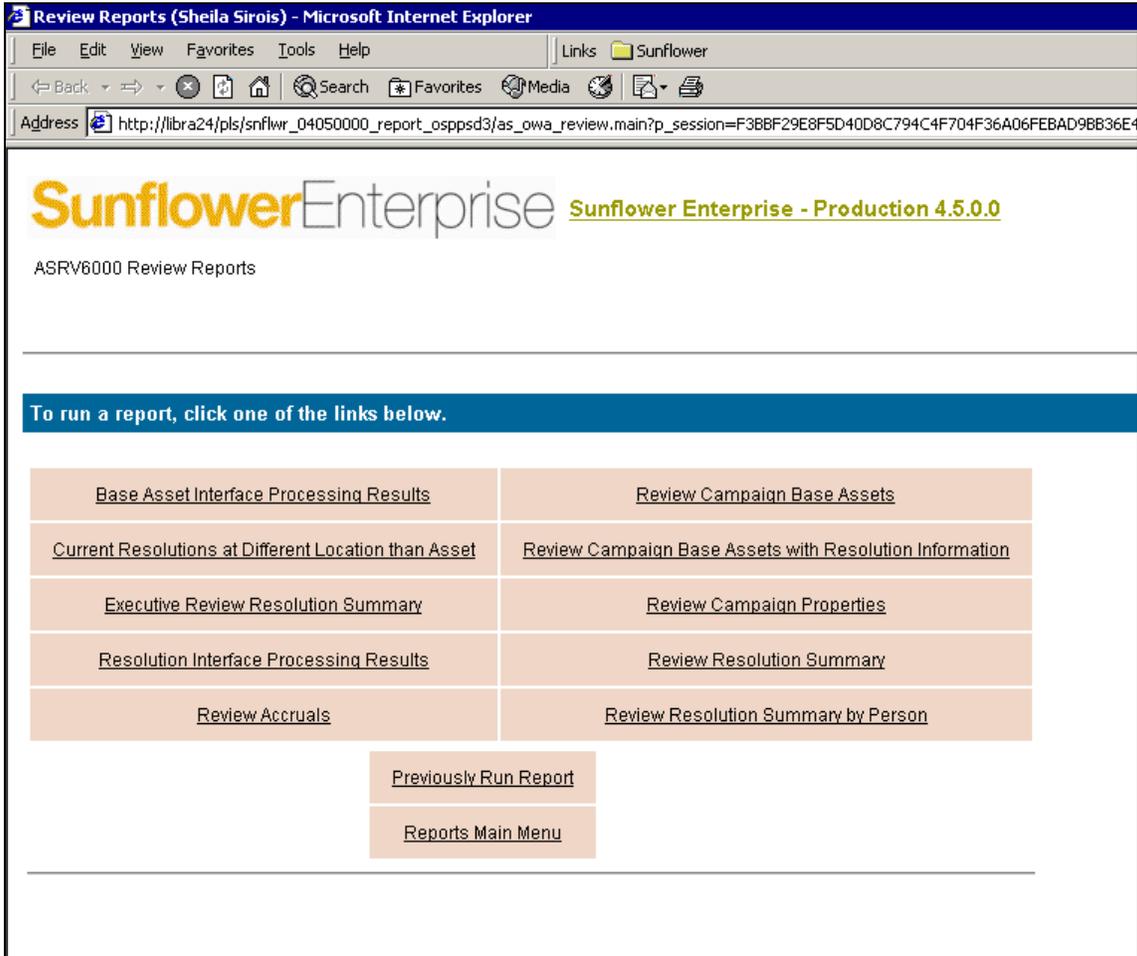
The NAVs are included as a reference for the reports listed above.



NAV: Review Campaign Properties

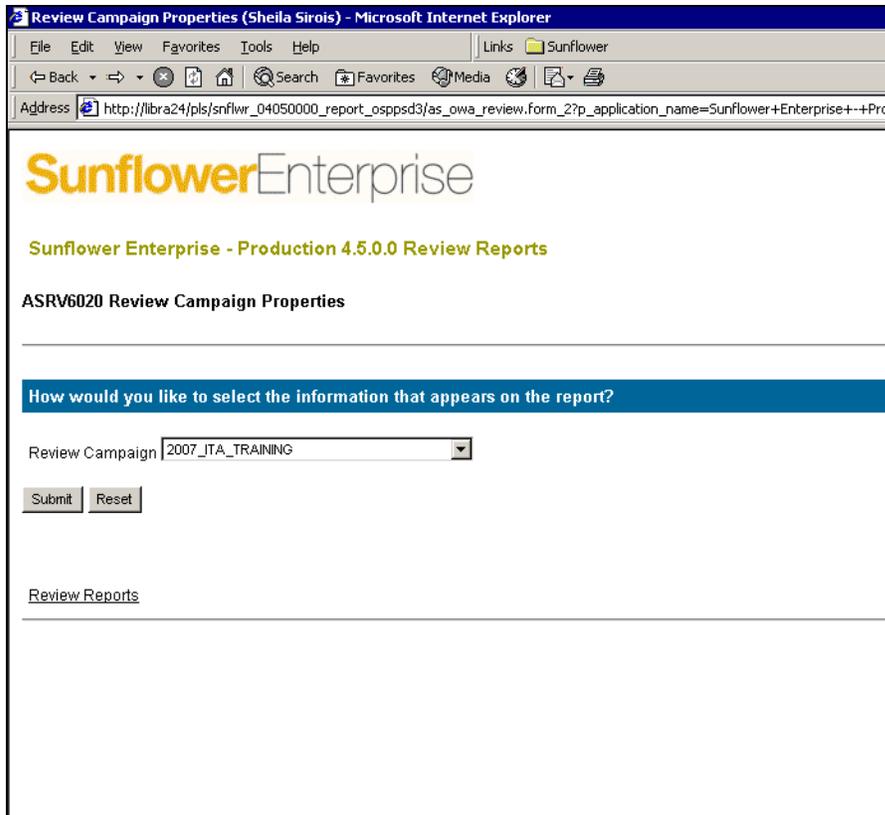
Review Campaign Properties

Review Manager
M > Review > Review Reports
Review Reports



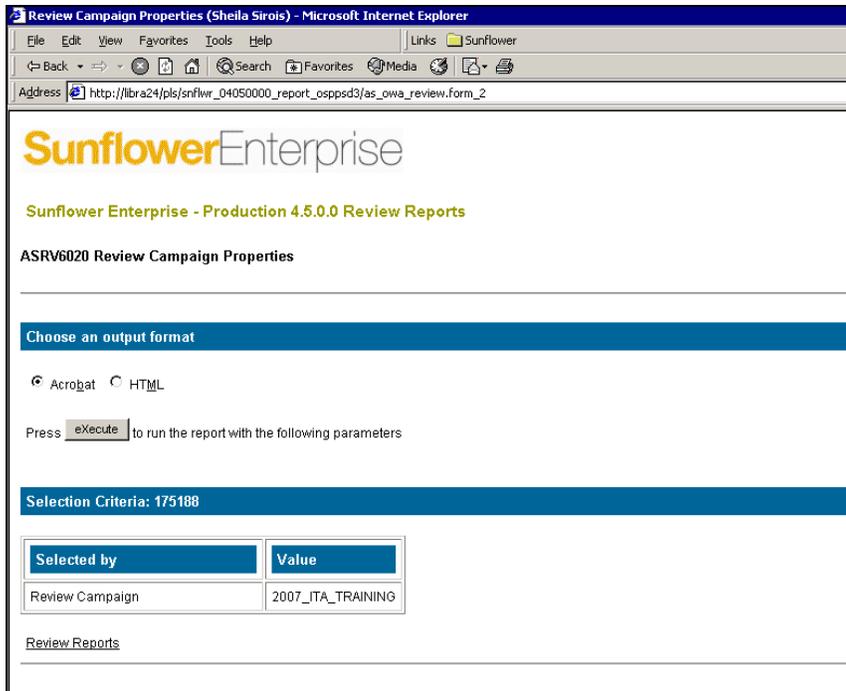
1. Select the **Review Campaign Properties** link.

Result: The query criteria window is displayed.



2. Select the Review Campaign in the **Review Campaign** field
3. Select the **Submit** button.

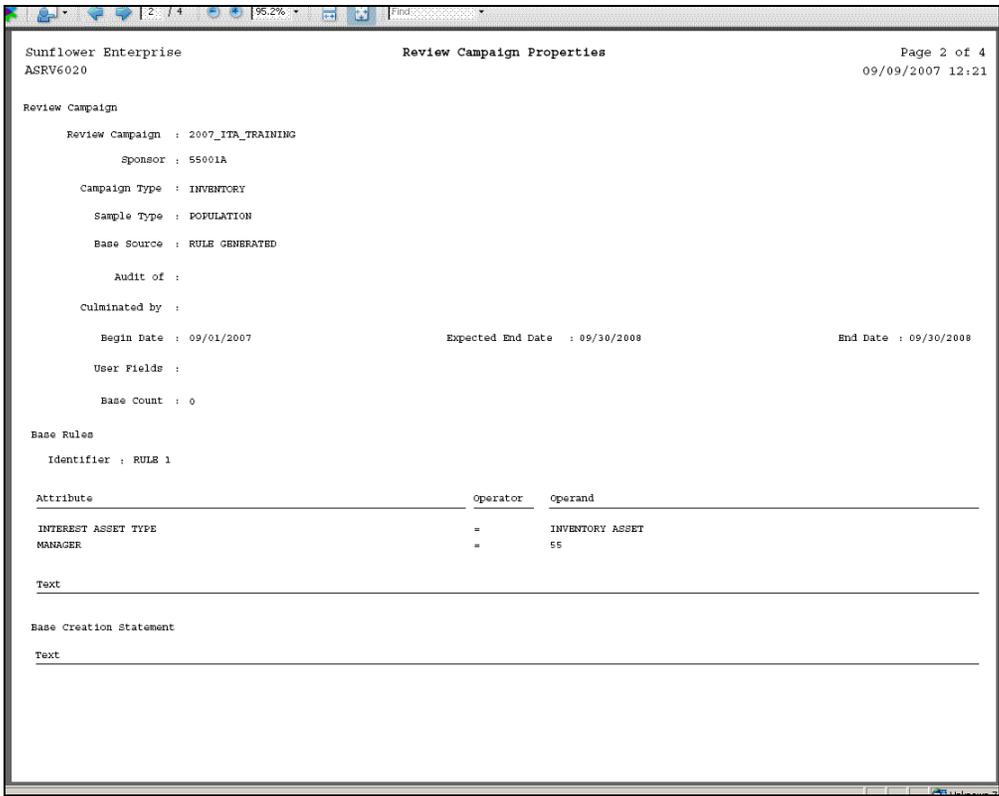
Result: The review screen appears.



4. Select the **Acrobat** radio button.
5. Select the **eExecute** button to run the report.

Result: The report displays.

Below is a complete **Review Campaign Properties** report:



End of activity.



NAV: Review Resolution Summary

Review Resolution Summary

Review Manager
M > Review > Review Reports
Review Reports

The screenshot shows a Microsoft Internet Explorer browser window titled "Review Reports (Sheila Sirois) - Microsoft Internet Explorer". The address bar contains the URL: http://libra24/pls/snflwr_04050000_report_osppsd3/as_owa_review.main?p_session=F3BBF29E8F5D40D8C794C4F704F36A06FEBAD96B36E4. The page header displays the "Sunflower Enterprise" logo and the version "Sunflower Enterprise - Production 4.5.0.0". Below the header, the text "ASRV6000 Review Reports" is visible. A blue banner contains the instruction: "To run a report, click one of the links below." Below this banner is a table of report links:

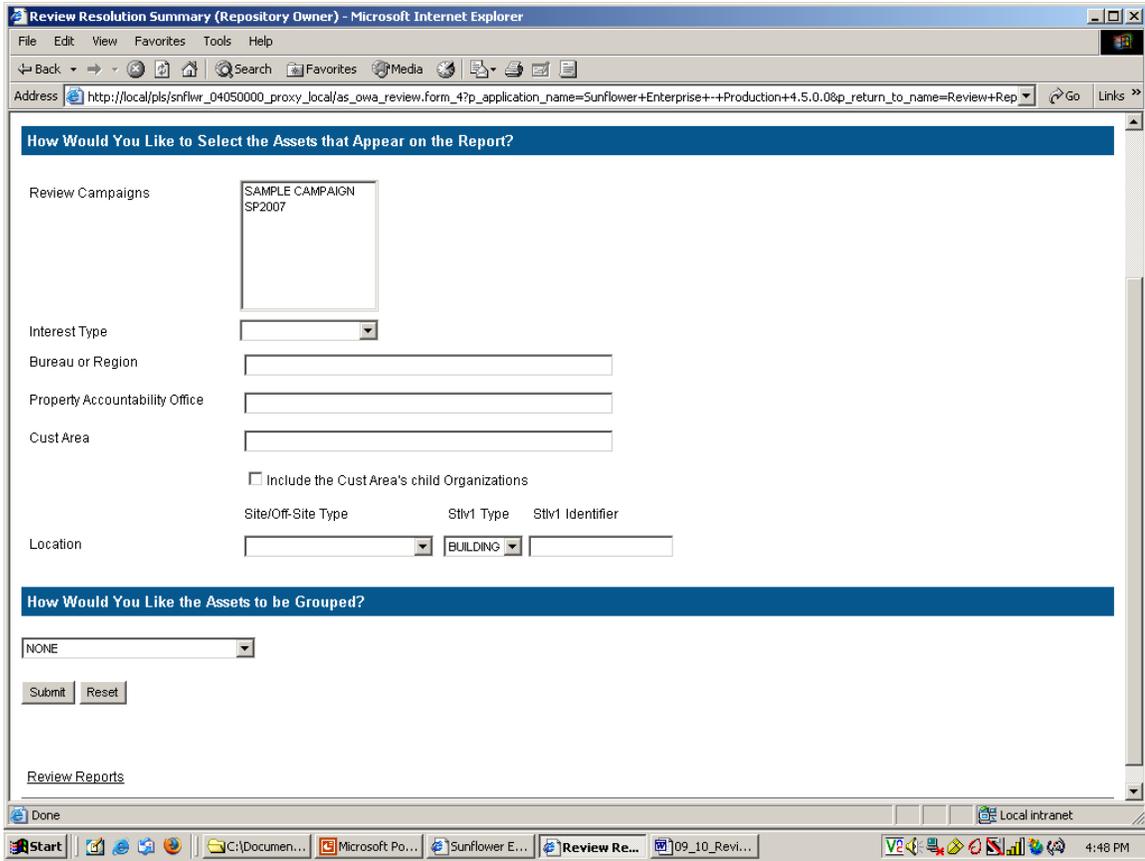
Base Asset Interface Processing Results	Review Campaign Base Assets
Current Resolutions at Different Location than Asset	Review Campaign Base Assets with Resolution Information
Executive Review Resolution Summary	Review Campaign Properties
Resolution Interface Processing Results	Review Resolution Summary
Review Accruals	Review Resolution Summary by Person

Below the table are two additional links:

- [Previously Run Report](#)
- [Reports Main Menu](#)

1. Select the **Review Resolution Summary** link.

Result: The query criteria window is displayed.



2. Select the Review Campaign in the **Review Campaign** field.
3. Select the **Interest Type** from the pull down menu on which to report.
4. Complete the remaining fields as desired.
5. Group the assets as you desire using the **How Would You Like the Assets to be Grouped?** pull down menu.
6. Select the **Submit** button to run the report.

Result: The review screen appears.

ASRV6030 Review Resolution Summary

Choose an output format

Acrobat
 HTML
 Text file export (Excel, Lotus 1-2-3, Access...)

Press **execute** to run the report with the following parameters

Selection Criteria: 175189

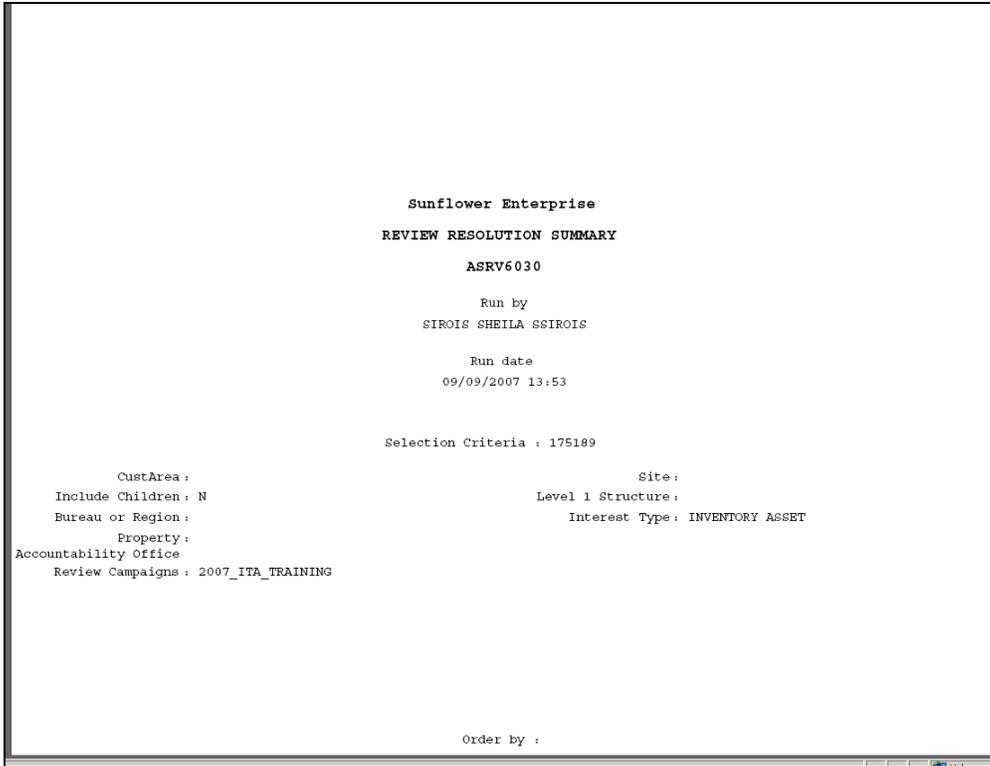
Selected by	Value
Review Campaign	2007_ITA_TRAINING
Interest Type	INVENTORY ASSET
Bureau or Region	
Property Accountability Office	
Cust Area	
Include Cust Area child Organizations	N
Location	
Grouped by	
Group #1	NONE

[Review Reports](#)

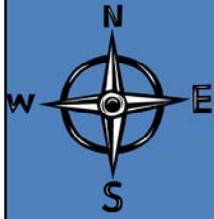
7. Select the **Acrobat** radio button.
8. Select the **execute** button to run the report.

Result: The report displays.

Below is a cover sheet of the **Review Resolution Summary** report:



End of activity.



NAV: Executive Review Resolution

Executive Review Resolution

Review Manager

M > Review > Review Reports

Executive Review Resolution Summary

The screenshot shows a Microsoft Internet Explorer browser window titled "Review Reports (Sheila Sirois) - Microsoft Internet Explorer". The address bar contains the URL: http://libra24/pls/snflwr_04050000_report_osppsd3/as_owa_review.main?p_session=F3BBF29E8F5D40D8C794C4F704F36A06FEBAD9BB36E4. The page header displays the Sunflower Enterprise logo and the text "Sunflower Enterprise - Production 4.5.0.0". Below the header, it says "ASRV6000 Review Reports". A blue banner contains the instruction: "To run a report, click one of the links below." Below this banner is a grid of links:

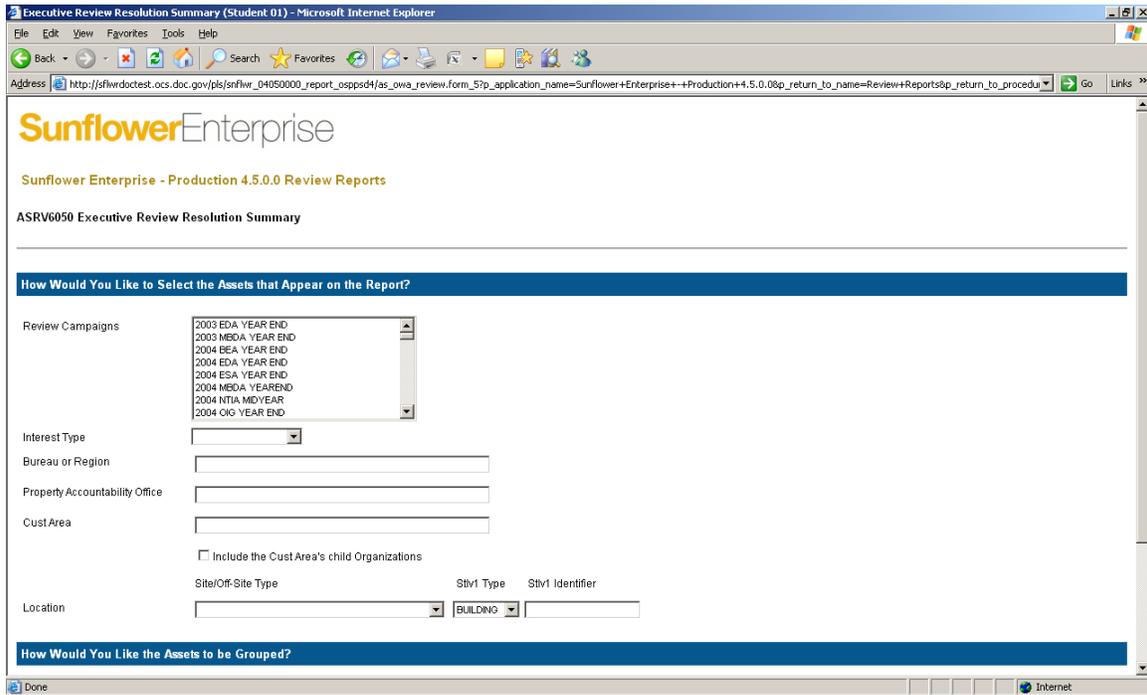
Base Asset Interface Processing Results	Review Campaign Base Assets
Current Resolutions at Different Location than Asset	Review Campaign Base Assets with Resolution Information
Executive Review Resolution Summary	Review Campaign Properties
Resolution Interface Processing Results	Review Resolution Summary
Review Accruals	Review Resolution Summary by Person

Below the grid are two additional links:

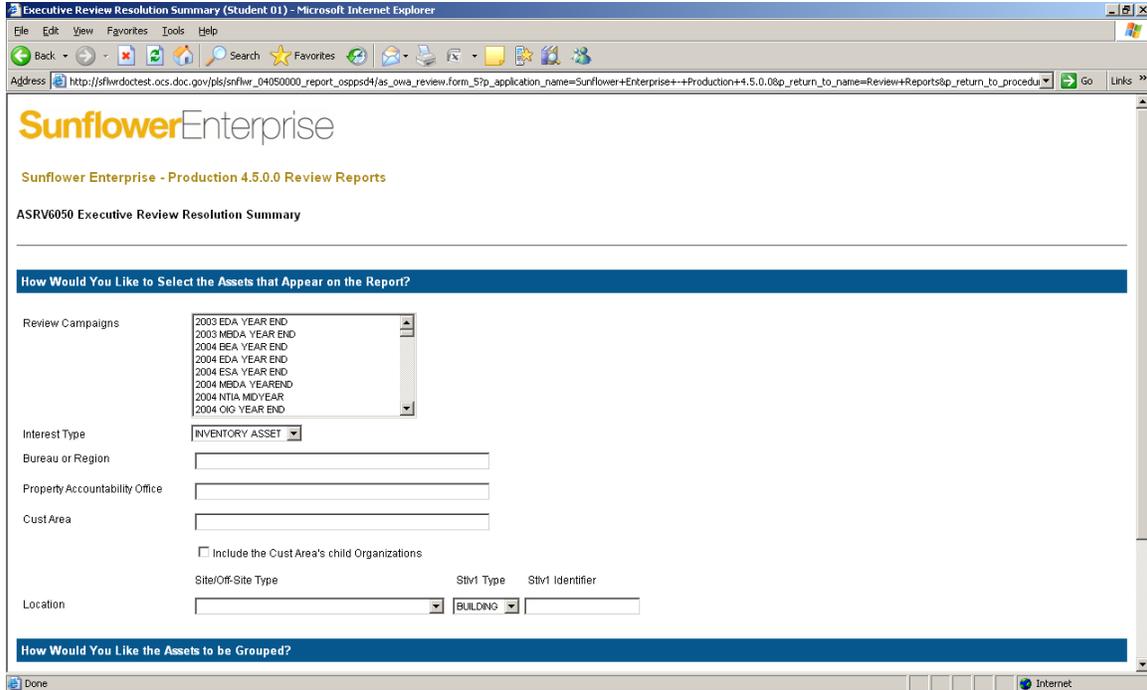
- [Previously Run Report](#)
- [Reports Main Menu](#)

1. Select the **Executive Review Resolution Summary** link.

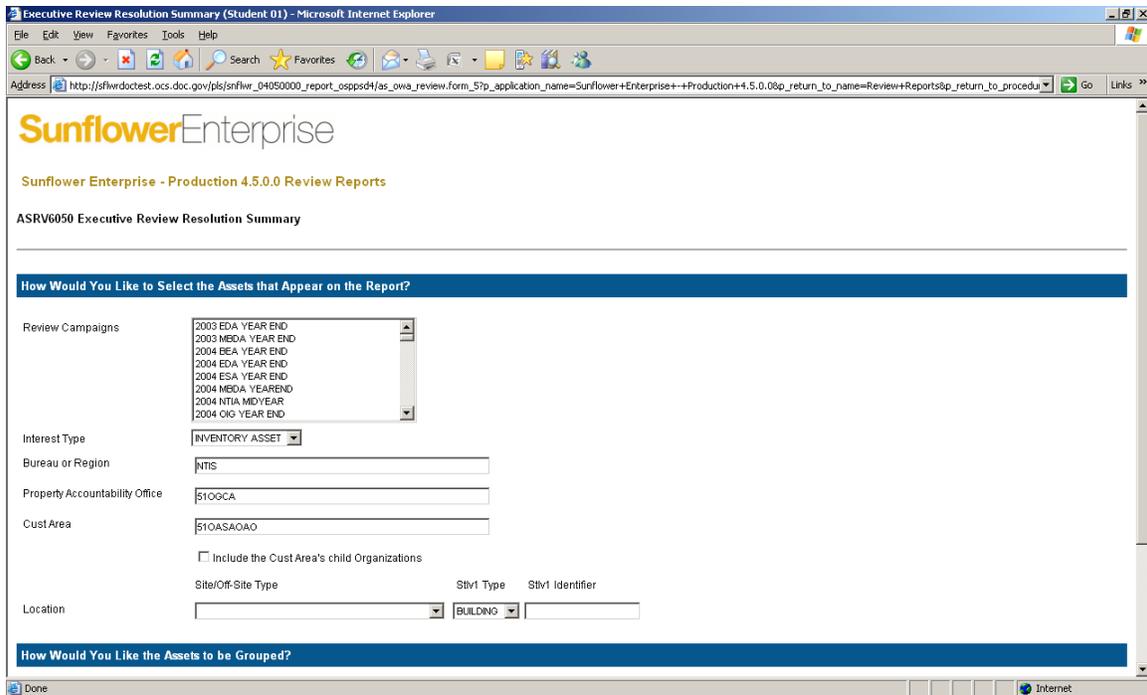
Result: The query criteria window is displayed.



2. Select the desired Review Campaign report in the **Review Campaign** box.

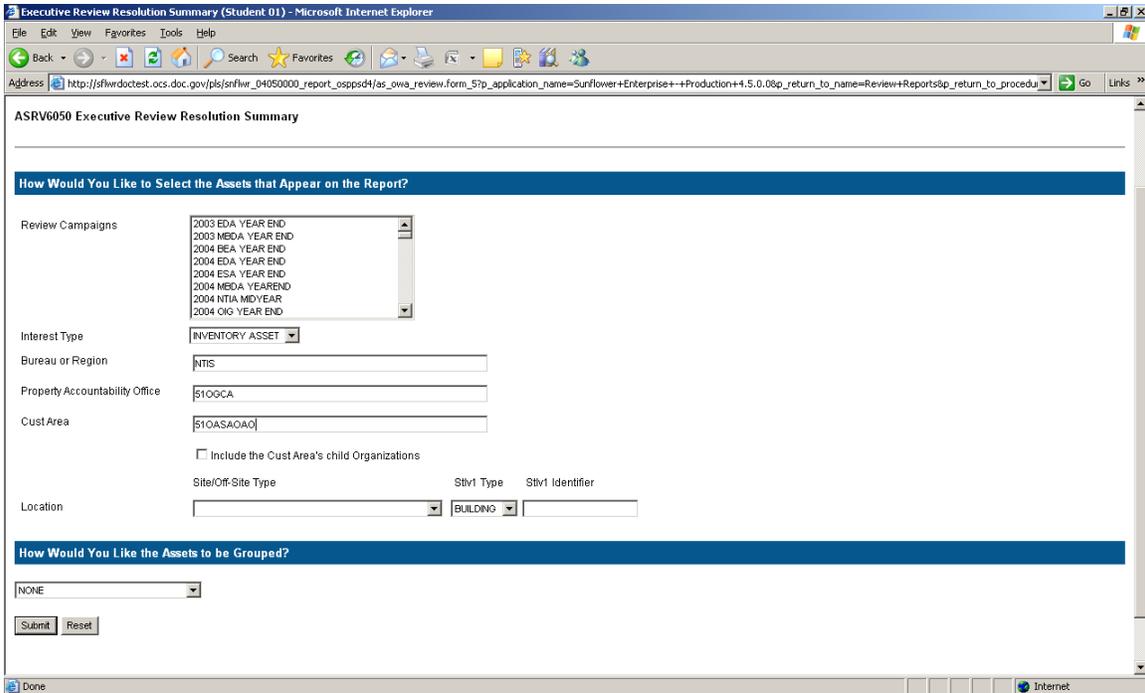


3. Select the asset **Interest Type** from the pull down menu on which to report.



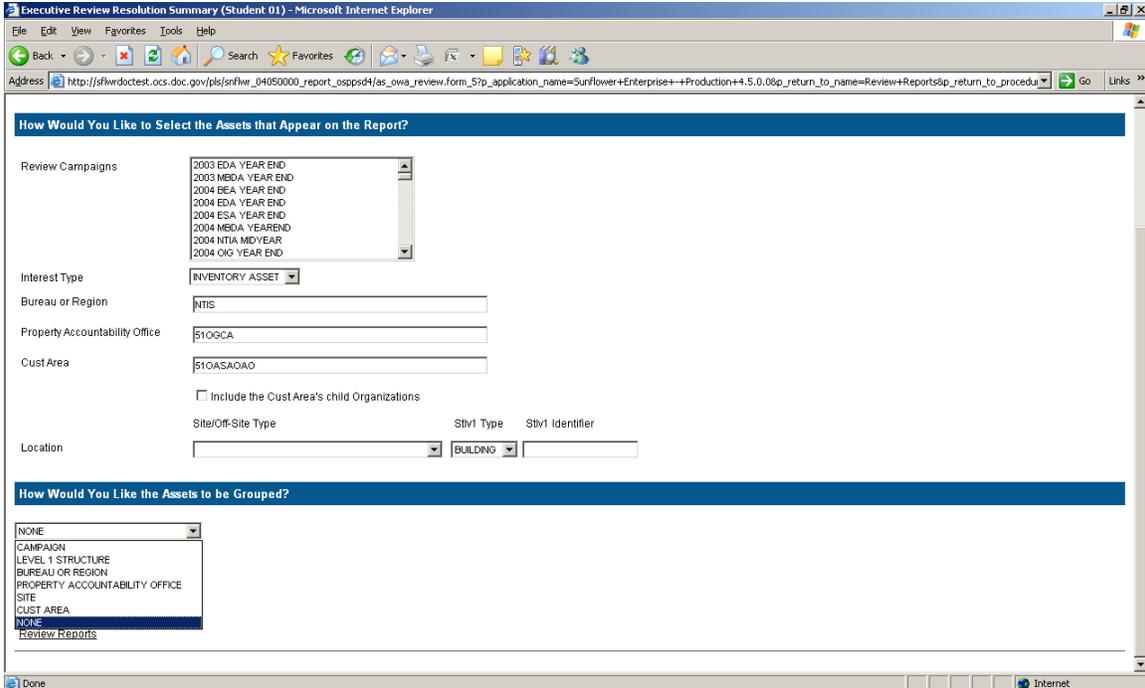
4. Enter the **Bureau or Region** and/or the **Property Accountability Office** and/or the **Custodial Area** and required to generate the desired report output.

NOTE: The more detailed the report criteria, the more specific the report output. Leaving Bureau, Region, PAO, or Custodial Areas blank generalize the report to the Review Campaign in its entirety.



5. Enter a specific **Site**, with **Building** (Stvl Identifier) as desired.

NOTE: Site criteria can be entered without entering Bureau or PAO.



6. Group the assets as you desire using the **How Would You Like the Assets to be Grouped?** (Drop down LOV).

7. Select the **Submit** button to run the report.

Result: The review screen appears displaying the report criteria entered.

Sunflower Enterprise - Production 4.5.0.0 Review Reports

ASRV6050 Executive Review Resolution Summary

Choose an output format

Acrobat HTML Text file export (Excel, Lotus 1-2-3, Access...)

Press to run the report with the following parameters

Selection Criteria: 175190

Selected by	Value
Review Campaign	2007_ITA_TRAINING
Interest Type	
Bureau or Region	
Property Accountability Office	
Cust Area	
Include Cust Area child Organizations	N
Location	
Grouped by	
Group #1	NONE

[Review Reports](#)

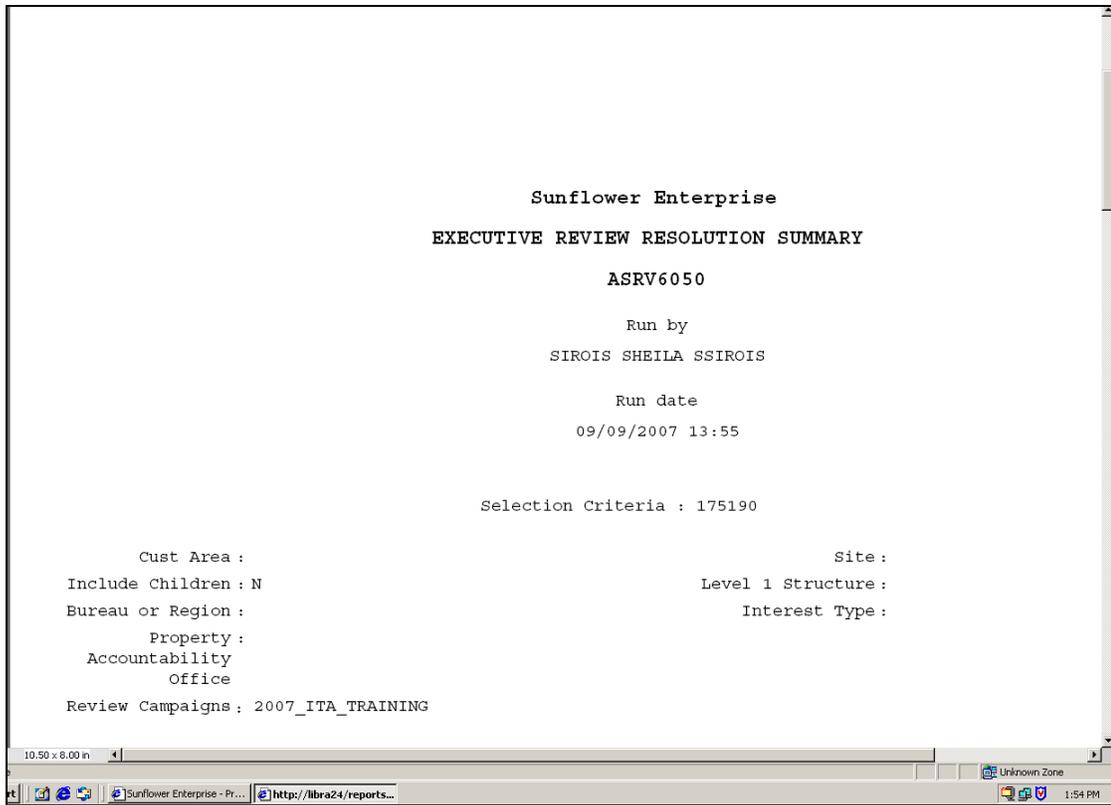
NOTE: Click **Back** in Explorer to adjust or re-enter the report criteria

8. Select the **Acrobat** radio button.

9. Select the **execute** button to run the report.

Result: The report displays.

Below is a cover page of the **Executive Review Resolution** report:



End of activity.

Lesson Summary

- You should now be able to:
 - Define Roles involved in a review campaign
 - Set up a review campaign
 - Use MobileTrak to upload data to scanners
 - Use MobileTrak to download data to Sunflower
 - Run reports to review campaign details and status
 - Close a review campaign

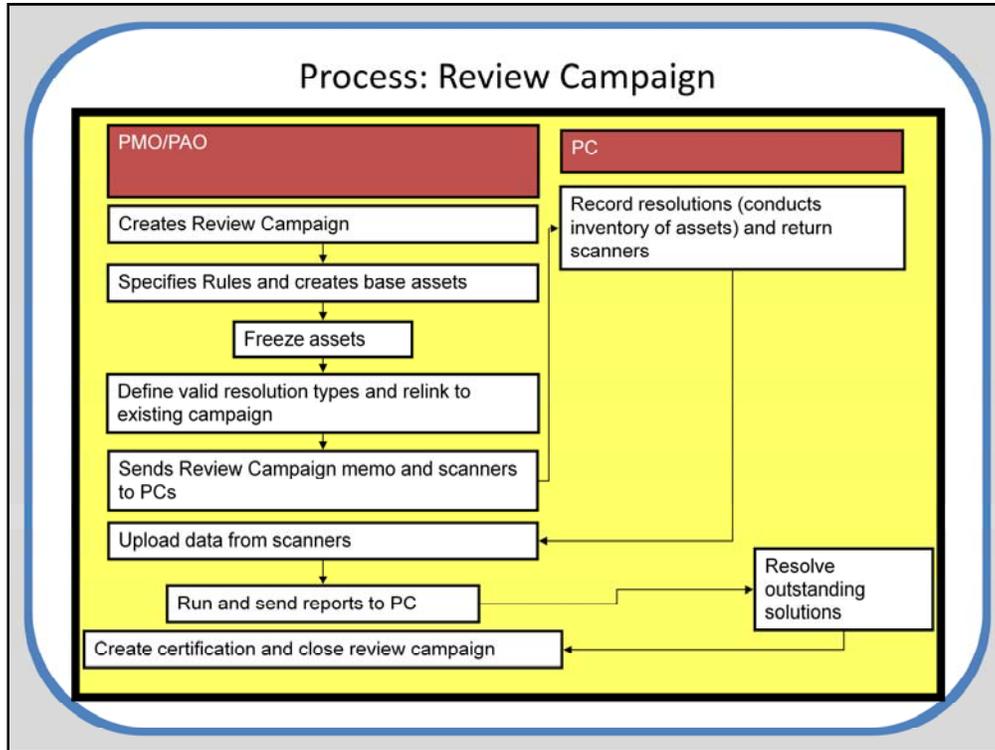


Chapter 9: Conduct a Review Campaign (PC)

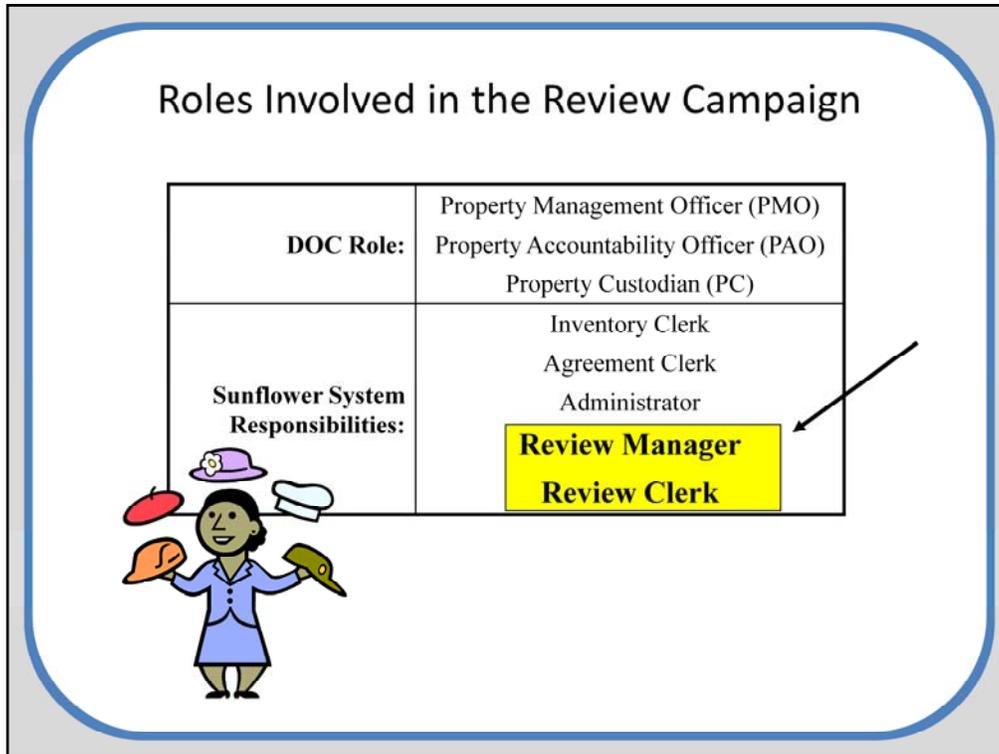
Sunflower Assets 4.5

Lesson Objectives

- After this lesson you should be able to:
 - Use MobileTrak to create resolutions
 - Use Online Forms to create resolutions
 - Resolve outstanding resolutions



This chapter focuses on the role of the PC during the review campaign.



PMOs will be set up as Review Managers and PAOs and PCs will be set up as Review Clerks.

Review Managers have access to and can manipulate the physical inventory process throughout the organization.

- Create
- Manage
- Close

Review Clerk can only perform management functions related to the review campaign for the custodial area to which they are assigned. The administrator must set at what level within DOC can the Review Clerk work with the assets.

Review Campaign Memo

- Receive from PMO/PAO
- Includes the Review Campaign Plan
- Begin and End Dates of the Review Campaign
- Dates that each campaign resolution type (barcode scan, online resolution) will be accepted
- Some PCs will also receive a barcode scanner

PCs may also review the Review Campaign Properties Report to see all the details of a particular Review Campaign.

Create Resolutions

- Mobile Devices
- Online

Any user that is part of the physical inventory process can create resolutions for the assets in the review campaign. Users may use a mobile device (i.e., barcode scanner) or an online Sunflower Form to record resolutions.

When creating resolutions be sure that you are using the correct resolution type (barcode scanner or online form) during the allowed time period. Otherwise it may not be recorded correctly and the asset may still show as “missing” when the campaign is closed.

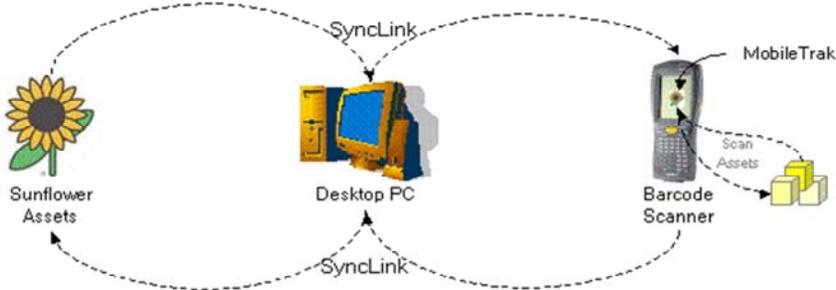
Sunflower MobileTrak™

- Sunflower Assets inventory management tool.
- Deployed via a fully integrated barcode reader that records and delivers asset information to your Sunflower Assets database.
- Supports the physical inventory (review) process in multiple locations whether the assets are located in one building, across town, or across the country.

MobileTrak includes all of the files needed to perform a physical inventory with your barcode scanner. It is downloaded with all of DOC's asset data which includes values in the List of Values fields. Identification of an asset for physical inventory begins by defining a review campaign in Sunflower Assets. Once the campaign is defined, the data is downloaded from Sunflower Assets to the scanner. The scanner can then be used to locate and scan the asset's barcode, the asset identifier.

Barcode Scanner Software Suite

- Sunflower SyncLink™ runs on your PC and transfers data from the server to the scanner and from the scanner back to the server.
- Sunflower MobileTrak™ runs on your scanner and is used to collect inventory data.
- Sunflower Bar Code Installer is used to install SyncLink™ and MobileTrak™.



MobileTrak™ - Overview

- Transfer Asset Records (SFA to the Scanner)
- Setup MobileTrak
- Create Resolutions (Scan and Key)
- Transfer Resolutions (Scanner to SFA)

MobileTrak - Download and Upload Assets

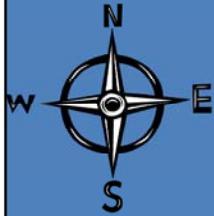
- Before you begin to use MobileTrak you will need to download reference data; consisting of lookups, reference files, and assets from your Sunflower Assets database to your barcode scanner.
- After all assets have been scanned, the data will then be uploaded back to Sunflower.



Inventory asset data is downloaded to the barcode scanners including all values in the LOVs which allows users to update information using the scanners as they are conducting the Review Campaign.

The scanned asset information uploaded to Sunflower is used to compare what was scanned to the assets in the Review Campaign. This information is used to generate reports detailing any errors with scanning assets, identifying any assets found during inventory, and provide a listing of assets still unaccounted for.

The PMO/PAO will conduct these steps prior to handing off the Barcode Scanners to the PC.



NAV: Scan Assets to Create Resolutions

Scan Assets to Create Resolutions

No Sunflower Role
M > Start > MobileTrak
MobileTrak



1. Select **Start**.



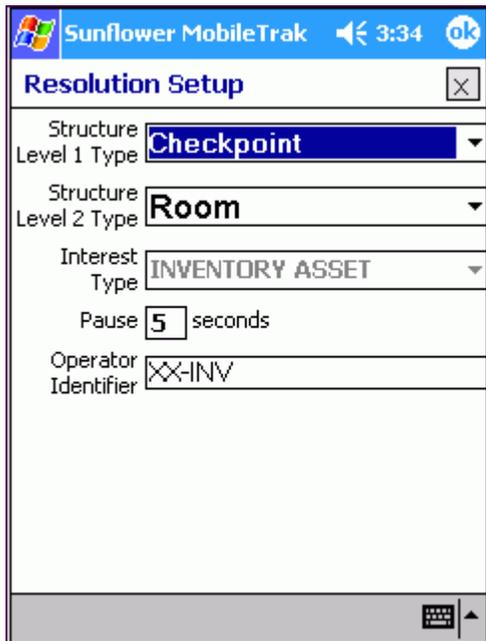
2. Select **MobileTrak**.

Result: The **MobileTrak** main menu appears.



3. Select **2. Resolution Setup**.

Result: The **Resolution Setup** window displays, and looks similar to the screenshot below:



4. Select **Building** from the **Structure Level 1 Type** field.

5. Select **Room** from the **Structure Level 2 Type** field.
6. In the **Pause** field, select the number of seconds of waiting time between each scan (0 = no pause, 9 = indefinite pause).
7. Enter your Employee/Badge Number in the **Operator Identifier** field.
8. Select **OK**.

Result: You are returned to the MobileTrak main menu.



9. Select **1. Record Resolutions**.

Result: The **Record Resolutions** window displays, and looks similar to the screenshot below:

The screenshot shows the Sunflower MobileTrak application interface. At the top, there is a status bar with the Sunflower logo, the text 'Sunflower MobileTrak', a back arrow, the time '5:36', and an 'ok' button. Below the status bar is a dropdown menu labeled 'Resolution Only'. The main form contains several fields: 'Site' with a dropdown menu showing 'RONALD REAGAN WASH', 'Checkpoint', 'Room', and 'Struct level 3', all of which are currently empty. Below these fields is the 'Operator' field, which contains '01-ADM'. Underneath the operator field is a message line that reads 'Active, Custodian: RICHARDS, C.'. At the bottom of the screen, there are five function buttons: 'Enter Ctrl+E', 'Change Ctrl+G', 'Clear Ctrl+C', 'Help Ctrl+L', and 'Add Ctrl+A'. The 'Clear Ctrl+C' button is highlighted in yellow.

10. Select Resolution and Location Update from the LOV at the top of the screen (above the Site field).

Result: Selecting this option will update the location of the asset if the asset location in Sunflower is different than what is in the resolution record.

Note: When recording a resolution, specify your current location for the scanning activity. Each resolution is captured at the current location that you establish on this screen. As you move from room to room, return to this screen to update the barcode scanner's location.

11. Select the site of the building where you are going to scan assets from the **Site** field.
12. Select the building from the **Building** field.
13. Enter or scan the room number in the **Room** field.
14. Select the empty asset identifier field, below the **Operator** identifier.
15. Scan the asset's barcode number.

If the Message Line shows "Not found in reference file", goto task #17. Otherwise, goto task #16.

16. If the asset's reference data is found in the scanner, then the **Message Line** shows asset status and PC or Contact ID. If this is the case, select the **Clear Ctrl+C** button and move on to the next asset.

Note: If you are going to be scanning assets in other rooms, remember to change the room information.

If you have more items to scan in the same room, goto task #15. Otherwise, goto task #24.

17. From the **Record Resolutions** screen, select the **Add Ctrl+A** button to add an asset.

Result: The **Add New Asset** screen appears.



18. Enter the manufacturer's name in the **Manufacturer** field, or scan the manufacturer from a printed list of common manufacturer barcodes.
19. Enter the model number in the **Model** field, or scan the model number from a printed list of common model number barcodes.
20. Enter the description in the **Description** field, or scan the description from a printed list of common description barcodes.
21. Enter the serial number in the **Serial** field, or scan the serial number of the asset.

Note: Skip the **Steward** and **Custodian** fields.

22. Enter the condition code of the asset in the **Condition Cd** field.
23. Select **OK** to save the record.

Result: The asset is recorded in the bar code reader and you are returned to the **Record Resolutions** screen.

If you have more items to scan in the same room:

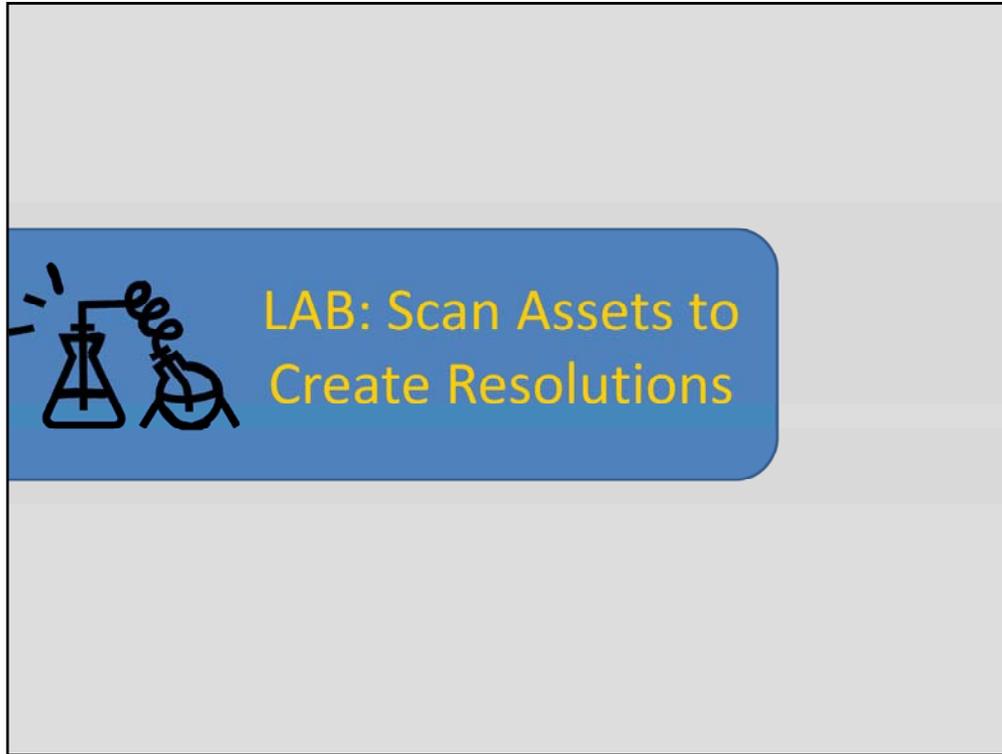
Goto task #15

If you have more items to scan in different rooms, goto task #9. Otherwise, goto task #24.

24. When finished, select **OK** to exit out of MobileTrak.

25. Select **Yes** to exit MobileTrak.

End of activity.



Check with your instructor to determine if scanners are available for conducting this Lab.

Review Scanned Resolutions

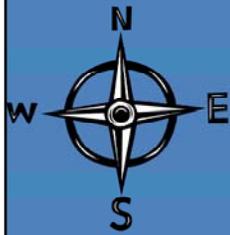
- Review Resolution Interface Processing Results
 - Goal: to have all resolutions accepted
- Inventory Resolution Results
 - Identifies assets found during inventory

Resolution Interface Processing Results – Run report after assets have been barcode scanned and data transferred (uploaded) to Sunflower. Identifies any errors with data that was scanned. Three primary reasons why a scanned resolution fails are:

- New asset not created successfully and is sent to auxiliary resolution table
- One of the location fields was entered incorrectly (site or building)
- Person entering resolutions incorrectly entered their ID

Run report based on Inventory plus the scanner identifier

Inventory Asset Interface Processing Results – This report should be run after online resolutions are entered. It will highlight all assets that were found during inventory.



NAV: Review Resolution Interface Processing Results

Review Resolution Interface Processing Results

Review Manager
M > Review > Review Reports
Review Reports

Review Reports (Sheila Sirois) - Microsoft Internet Explorer

File Edit View Favorites Tools Help Links Sunflower

Address http://libra24/pls/snflwr_04050000_report_osppsd3/as_owa_review.main?p_session=F3BBF29E8F5D40D8C794C4F704F36A06FEBAD96B36E4

SunflowerEnterprise Sunflower Enterprise - Production 4.5.0.0

ASRV6000 Review Reports

To run a report, click one of the links below.

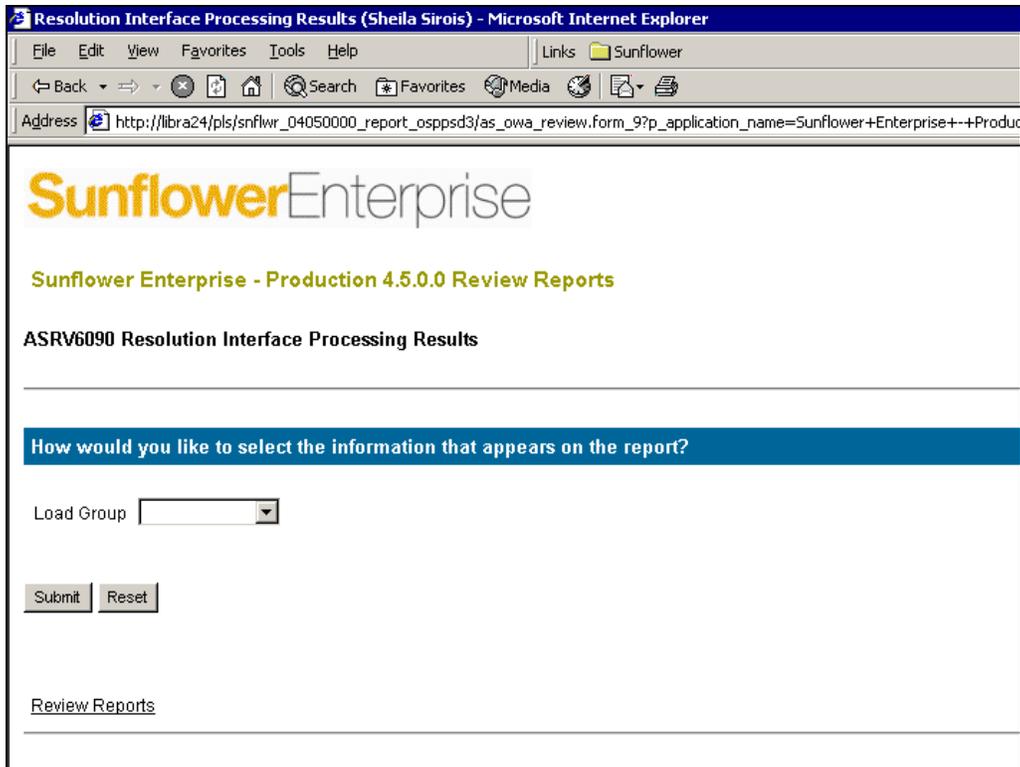
Base Asset Interface Processing Results	Review Campaign Base Assets
Current Resolutions at Different Location than Asset	Review Campaign Base Assets with Resolution Information
Executive Review Resolution Summary	Review Campaign Properties
Resolution Interface Processing Results	Review Resolution Summary
Review Accruals	Review Resolution Summary by Person

[Previously Run Report](#)

[Reports Main Menu](#)

1. Select **Resolution Interface Processing Results**.

Result: The **Resolution Interface Processing Results** parameters window displays:

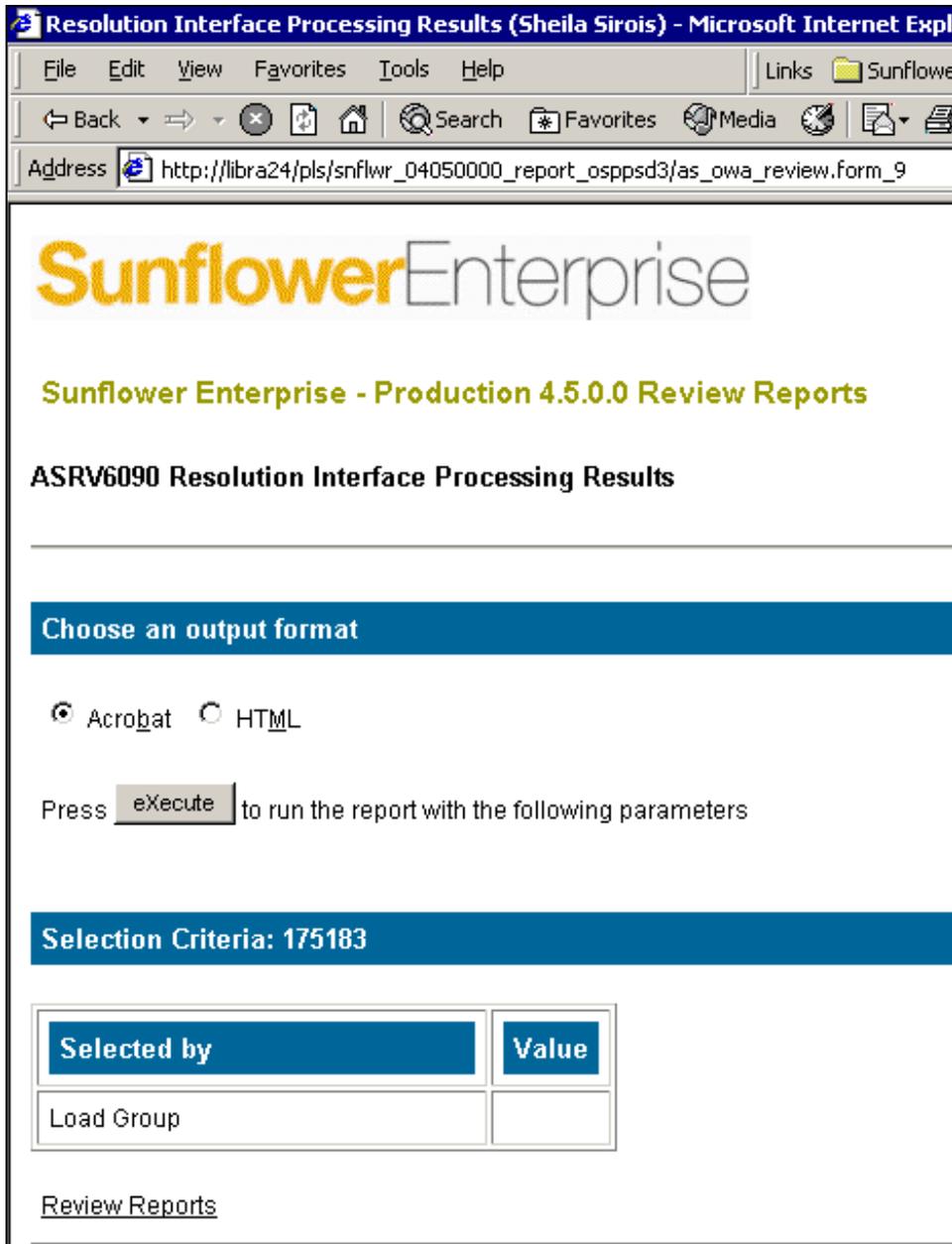


2. In the **Load Group** lookup list, select the Load Group number with the following format: **RS<Scanner ID>**.

Note: To view the results from all scanners, leave the **Load Group** field blank.

3. Select **Submit**.

Result: A window displays that allows you to review the report parameters:



4. Select the **Acrobat** radio button.
5. Select **eXecute**.

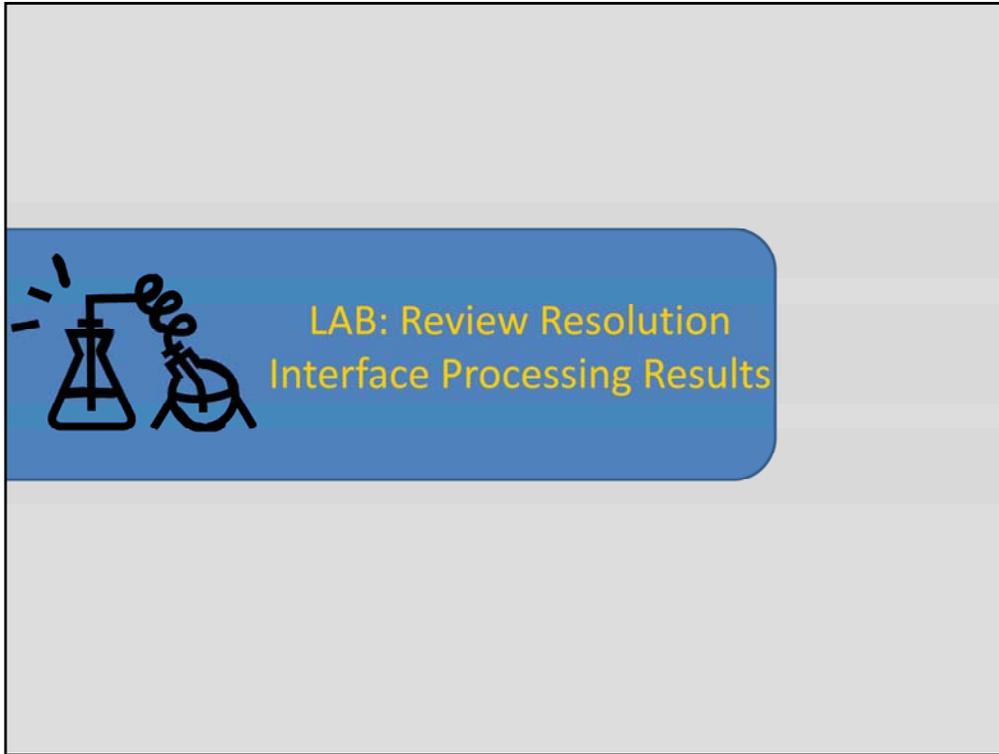
Result: The report displays in a separate window, allowing you to review the resolution interface processing results.

Sunflower Assets		Resolution Interface Processing Results		Page 2 of 4
ASRV6090				11/15/2005 18:41
RS0000000001 : RS0000000001				
Record Group	Date	Result		
11-1051102103751	11/03/2005 14:35:38	OK (Identifier:INV - 7.1.1.STEP11-1 Type:Date/Time:11/02/2005 10:27:51 Site:CAMPUS Stlvl 1:BUILDING 10 Stlvl 2:ROOM 123 Stlvl 3:)		
Success Total		1		
Record Group	Date	Result		
Failure Total		0		
Record Group	Date	Result		
Unmatched Total		0		
Load Group Total		1		

Note: See below for an explanation of the report features:

- The first group shows the resolution records that were processed successfully.
- The second group shows the failed resolution records that could not be processed due to some error. Any errors should be investigated and fixed accordingly.
- The third group shows the unmatched resolution records that are stored in as_auxiliary_load_resolutions table to be processed later on when the found asset is successfully created in Sunflower Asset.

End of activity.



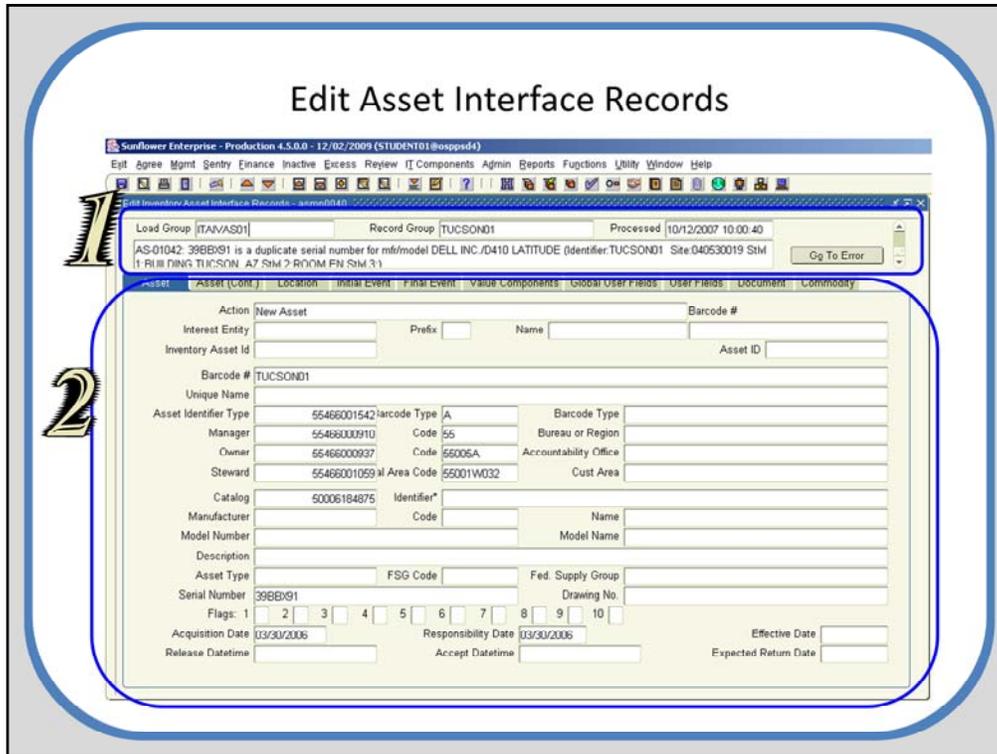
Check with your instructor to determine if scanners are available for conducting this Lab.

Manage Uploaded Data

- If Inventory Management assets were added, you may need to use the ***Edit Inventory Assets Interface Records*** form to edit the asset data and add additional details in order to create a valid asset that can be saved to the database.
- If resolution errors were indicated, you may need to use the ***Edit Resolution Interface Records*** form to edit the resolution data in order to create a valid resolution.
- If no additions or changes were made to scanned assets, then you may simply want to review the assets by using the ***Lookup Inventory Assets Resolutions*** form.

After the MobileTrak data is scanned, one of three actions may need to occur:

- Enter additional data for assets found during inventory
- Fix errors (location entered incorrectly, user entering assets incorrectly signed in)
- Review all assets



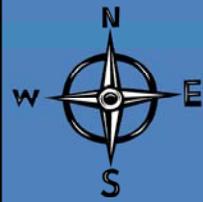
The Edit Inventory Interface Records form enables you to modify records that enter Sunflower Assets from MobileTrak. Anytime a new asset is added using MobileTrak, the new asset will require additional details not available within MobileTrak. You will be able to use the Edit Inventory Interface Records form in order to amend the asset data and save the new asset to the database. Additionally, this form is useful to update details to an asset record should there be errors in the data related to the asset. Once corrections have been successfully saved, the error is now removed from the interface records and will not appear in here in subsequent queries.

Area 1: With your cursor in the **Load Group** field, click the Find button, enter the scanner ID (this ID starts with RS, for example: RS000000012), and then click the Find button again.

Result: All the failed records will appear (use the down arrow on the keyboard to scroll though and see all the different errors)

The message field directly under the Scanner ID field describes the type of error that occurred.

Area 2: Use the necessary fields to update the data for the added assets or to correct errors. Use the tabs at the top to navigate to additional asset record details.



NAV: Edit Inventory Asset Interface Records

Edit Inventory Asset Interface Records

Purpose

The purpose of this document is to describe how to convert error records uploaded from the bar code reader into updated property records.

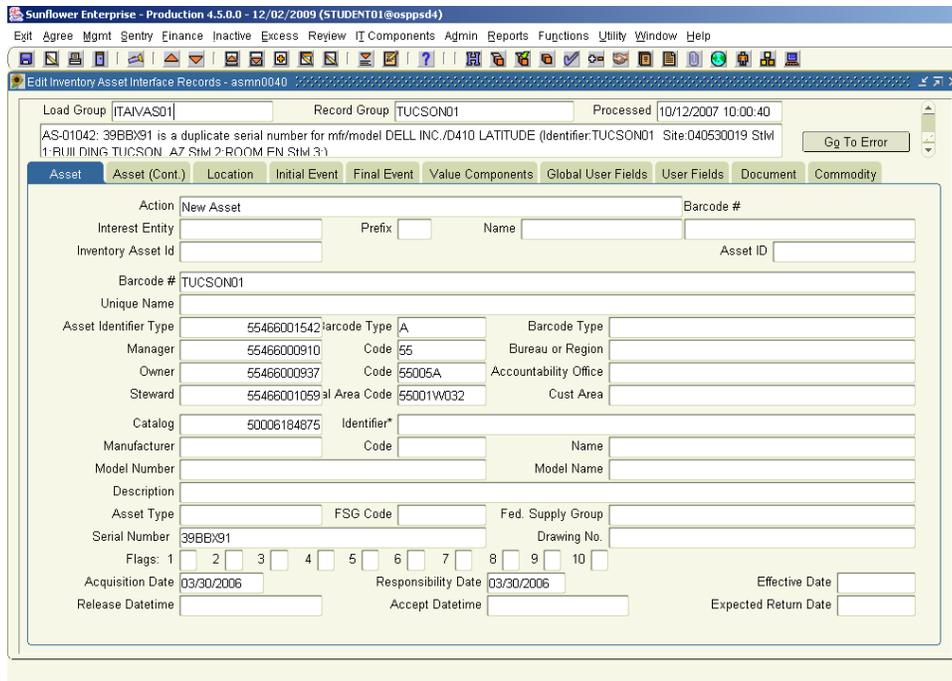
Review Manager, Inventory Manager

M > Mgmt > Edit Inventory Asset Interface Records

Edit Inventory Asset Interface Records

The screenshot shows the Sunflower Enterprise software interface. The title bar reads "Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@osppsd3)". The menu bar includes: Exit, Agree, Contract, Mgmt, Sentry, Finance, Inactive, Excess, Review, IT Components, Admin, Reports, Functions, Utility, Window, Help. The toolbar contains various icons for file operations and navigation. The main window title is "Edit Inventory Asset Interface Records - asmn0040". Below the title bar, there are fields for "Load Group", "Record Group", and "Processed", along with a "Go To Error" button and an "Ignore Indicators" checkbox. A tabbed interface is visible with tabs for: Asset, Asset (Cont.), Location, Initial Event, Final Event, Value Components, Global User Fields, User Fields, Document, Commodity, and Indicators. The "Asset" tab is active, showing a form with the following fields: Action, Interest Entity, Inventory Asset Id, Barcode #, Unique Name, Asset Identifier Type, Manager, Owner, Steward, Catalog, Manufacturer, Model Number, Description, Asset Type, Serial Number, Flags (1-10), Acquisition Date, Release Datetime, Prefix, Name, Asset ID, Barcode Type, Bureau or Region, Accountability Office, Cust Area, Identifier*, Code, Name, Model Name, FSG Code, Fed. Supply Group, Drawing No., Responsibility Date, Accept Datetime, Effective Date, and Expected Return Date.

1. Place your cursor in the **Load Group** field.
2. Select the **Find** button from the toolbar.
3. In the **Load Group** field, enter the scanner ID (this ID starts with RS, for example: RS0000000012) and select the **Find** button from the toolbar again. This will return all errors for the Load Group entered.



4. The description of the error appears in the window below the Load Group field.
5. The description indicates the data and related data field where the error has occurred, or
6. Select the **Go To Error** button to place the cursor in the field requiring correction
7. Update any information as needed.
8. Select the **Tabs** across the top of the screen to access additional property field details to update.
9. Select the **Save** button from the toolbar.

Result 1: The message on the status bar will indicate that the record was successfully saved.

Result 2: The record is removed from the interface table, and the property record will be updated with the new information.

10. Continue to scroll through the records, repeating steps 4-7, until there are no more errors.

End of activity.

Most Common Error Messages on the Edit Resolution Interface Records Table

Error Message	Meaning	Action
SA-00108: Insufficient privilege to perform INS on SA_STRUCTURE_LEVEL_1...	The role of the user does not allow him/her to create a new building. The scanner operator entered an invalid building code in the Structure Level 1 field.	Delete the building from the Stlv1 field and select a building from the LOV.
SA-01074: Instance 50000015700 of SA_STRUCTURE_LEVEL_1 is inactive...	The scanner operator entered a building code that is no longer active in the Structure Level 1 field.	Delete the building from the Stlv1 field and select a building from the LOV.
SA-01090: Unable to determine value for AS_RESOLUTION.ASSET_ID from value 'Interest Type'...	Asset not found in Sunflower should be added to spreadsheet given to each property officials to record items that failed to scan.	The custodian should create new acquisitions in Sunflower for all assets that have not been entered into Sunflower.
AS-001125: Identifier CD000XX also appears on source_record_group 00030XX	The resolution exists in another load group.	Lookup the resolution by the record group number provided in the error message to determine the other load group. Coordinate with the other person to ensure one person processes the resolution. The second instance will be deleted.
SA-00110: Unique constraint RS_AS_RSTP_REC_DTTM_UK of AS_RESOLUTION is not satisfied...	A duplicate resolution. This results when the files from the scanner are uploaded more than once. NOTE: Click the Yes button to delete file from scanner after uploading.	Delete the duplicate record. Click the Remove Record icon to delete the record.

Error Message	Meaning	Action
<p>AS-01015: Insufficient privilege to set/change the location for the given asset (Identifier:INV - CD0000641557 Type:Date/Time:05/22/2008 14:35:41 Site:53585 Stlvl 1:BUILDING NTIS Stlvl 2:ROOM 1021 Stlvl 3:)</p>	<p>The person who processed the upload through SyncLink from the scanner did not have privileges to update the asset record</p>	<p>The Property Custodian or PAO of the asset should try to process the resolution by clicking the Save icon</p>

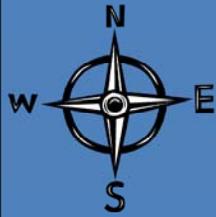


Check with your instructor to determine if scanners are available for conducting this Lab.

Assets Found During Inventory

- Assets scanned, but not currently in Sunflower
- Need to update the information in Sunflower to create a complete property record

The **Inventory Asset Interface Processing Results** report will identify these records.



NAV: Generate Report of
Assets Found During
Inventory

Generate Report of Assets Found During Inventory

Review Manager

M> Mgmt > Management Reports

Management Reports

SunflowerEnterprise Sunflower Enterprise - Production 4.5.0.0

ASMN6000 Management Reports

To run a report, click one of the links below.

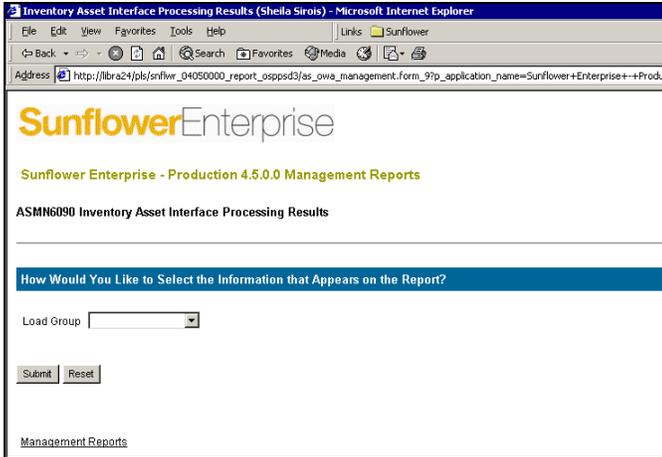
Inventory Assets (Global Information)	Inventory Asset Summary by Asset Flag
Asset Search	Inventory Asset Summary by Asset Type
Asset Structure	Inventory Asset Timeline
Inventory Asset Activity Summary by Asset Flag	Inventory Asset Utilization
Inventory Asset Activity Summary by Asset Type	Inventory Assets Pending Acceptance by Age
Inventory Asset Final Events	Inventory Assets Pending Release by Age
Inventory Asset History	Inventory Assets with Recently Denied Requests
Inventory Asset Initial Events	Inventory Assets with Requests
Inventory Asset Interface Processing Results	Purchase Order Aging Report
Inventory Asset Ongoing Events	High Volume Shipping Interface Processing Results

[Previously Run Report](#)

[Reports Main Menu](#)

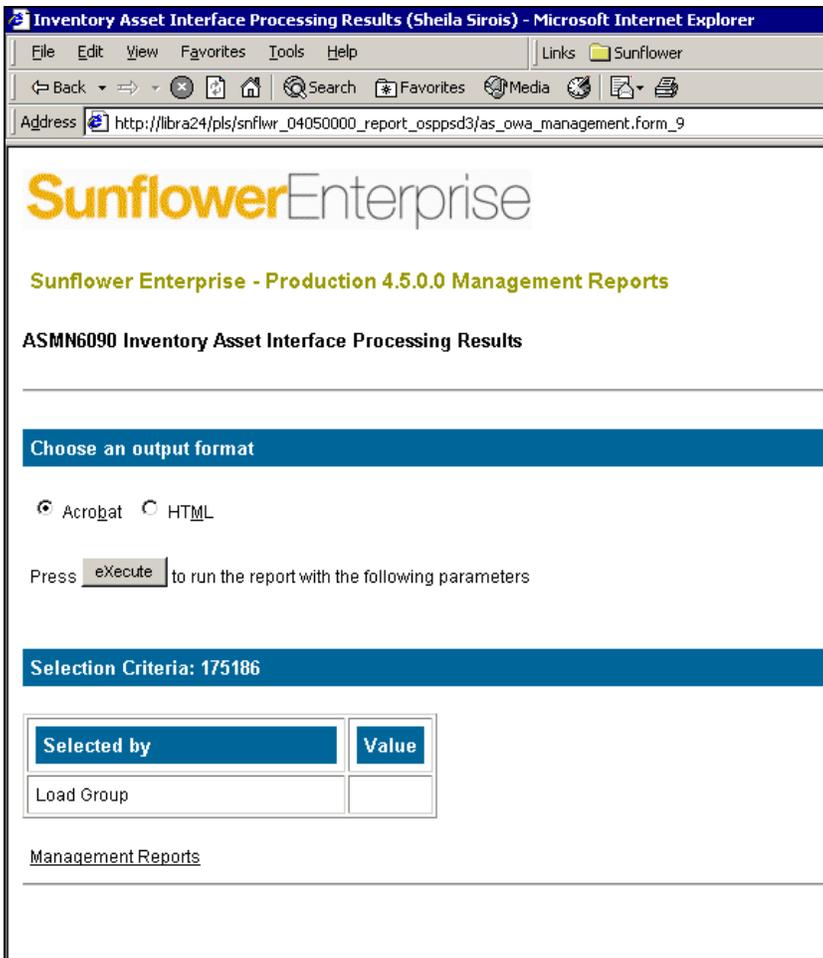
1. Select **Inventory Asset Interface Processing Results**.

Result: The **Inventory Asset Interface Processing Results** parameters window displays:



2. In the **Load Group LOV**, select the Load Group number.
3. Select **Submit**.

Result: A window displays that allows you to review the report parameters:



4. Select the **Acrobat** radio button.

Generate Report of Assets Found During Inventory
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 SF 4.5

5. Select **eXecute**.

Result: The report displays in a separate window, allowing you to review the results of the inventory asset interface processing.

The Report is sorted as follows:

- The first group shows the found inventory assets that were created successfully.

- The second group shows the failed inventory asset records that could not be created due to some error.

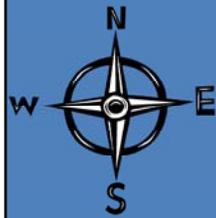
End of activity.

Review Campaign Base Assets with Resolution Information

Sunflower Enterprise ASRV6040		Review Campaign Base Assets with Resolution Information				Page 2 of 4 09/18/2006 16:33	
Identifier	Flag	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
ADR XE01	S	COMPUTER PORTABLE	APPLE	M555	121212	0	4,400.00 01/01/1995
Manager : SUNFLOWER SYSTEMS Owner : SUNFLOWER SYSTEMS Steward : ASSET CENTER XX Custodian : FRALIER TIMOTHY M 050167 User : Location : SAN FRANCISCO BUILDING : E ROOM : 1808 Review Campaign: XE2006 Resolution: ONLINE DECLARATIVE Created by : TRAINER SYSTEMS AEMOX Authorized by : TRAINER SYSTEMS AEMOX Just. Level : On : 09/18/2006							
FER XE40	S	COMPUTER PERSONAL	DELL	D333	4010X	0	4,950.00 04/01/1996
Manager : SUNFLOWER SYSTEMS Owner : SUNFLOWER SYSTEMS Steward : ASSET CENTER XX Custodian : DOE JOHN 050598 User : Location : LYVENHOCKER BUILDING : E ROOM : 1222 Review Campaign: XE2006 Resolution: ONLINE DECLARATIVE Created by : TRAINER SYSTEMS AEMOX Authorized by : SMITH SOHAM X 02EX Just. Level : IF ASSESSER VERIFIED On : 09/18/2006							
IRV XE02	S	COMPUTER PERSONAL	DELL	D333	22112W	0	3,000.00 05/01/1998
Manager : SUNFLOWER SYSTEMS Owner : SUNFLOWER SYSTEMS Steward : ASSET CENTER XX Custodian : FRALIER TIMOTHY M 050167 User : Location : SAN FRANCISCO BUILDING : G ROOM : 1300X Review Campaign: XE2006 Resolution: ONLINE PHYSICAL Created by : TRAINER SYSTEMS AEMOX Recorded by : SMITH SOHAM X 02EX Location : SAN FRANCISCO BUILDING : G ROOM : 1234XX On : 09/18/2006							
IRV XE04	S	PC	IBM	8086 MOTOR COMPANY	T4000	033W	14,800.00 01/01/1990
Manager : SUNFLOWER SYSTEMS Owner : SUNFLOWER SYSTEMS Steward : ASSET CENTER XX Custodian : XX CUSTODIAN COUTEX User : Location : LYVENHOCKER BUILDING : F Review Campaign: XE2006 Resolution: ONLINE PHYSICAL Created by : TRAINER SYSTEMS AEMOX Recorded by : TRAINER SYSTEMS AEMOX Location : LYVENHOCKER BUILDING : G ROOM : 200 On : 09/18/2006							

As the review campaign continues, the PAO/PMO will run reports identifying assets still not “found” during inventory. They will distribute the **Base Assets with Resolution Information** report to the PCs. This worksheet identifies all open assets and includes an area for the PC to note the location where the asset was found. The PC will then complete an Online Resolution form to input the information.

The PC may also take the initiative and run this report at any point during the campaign.



NAV: Review Campaign Base
Assets with Resolution
Information Report

Review Campaign Base Assets with Resolution Information

Review Manager

M > Review > Review Reports

Review Reports

The screenshot shows a Microsoft Internet Explorer browser window titled "Review Reports (Sheila Sirois) - Microsoft Internet Explorer". The address bar contains the URL: http://libra24/pls/snflwr_04050000_report_osppsd3/as_owa_review.main?p_session=F3BBF29E8F5D40D8C794C4F704F36A06FEBAD96B36E4. The page header displays the Sunflower Enterprise logo and the version "Sunflower Enterprise - Production 4.5.0.0". Below the header, the text "ASRV6000 Review Reports" is visible. A blue banner contains the instruction "To run a report, click one of the links below." Below this banner is a grid of links:

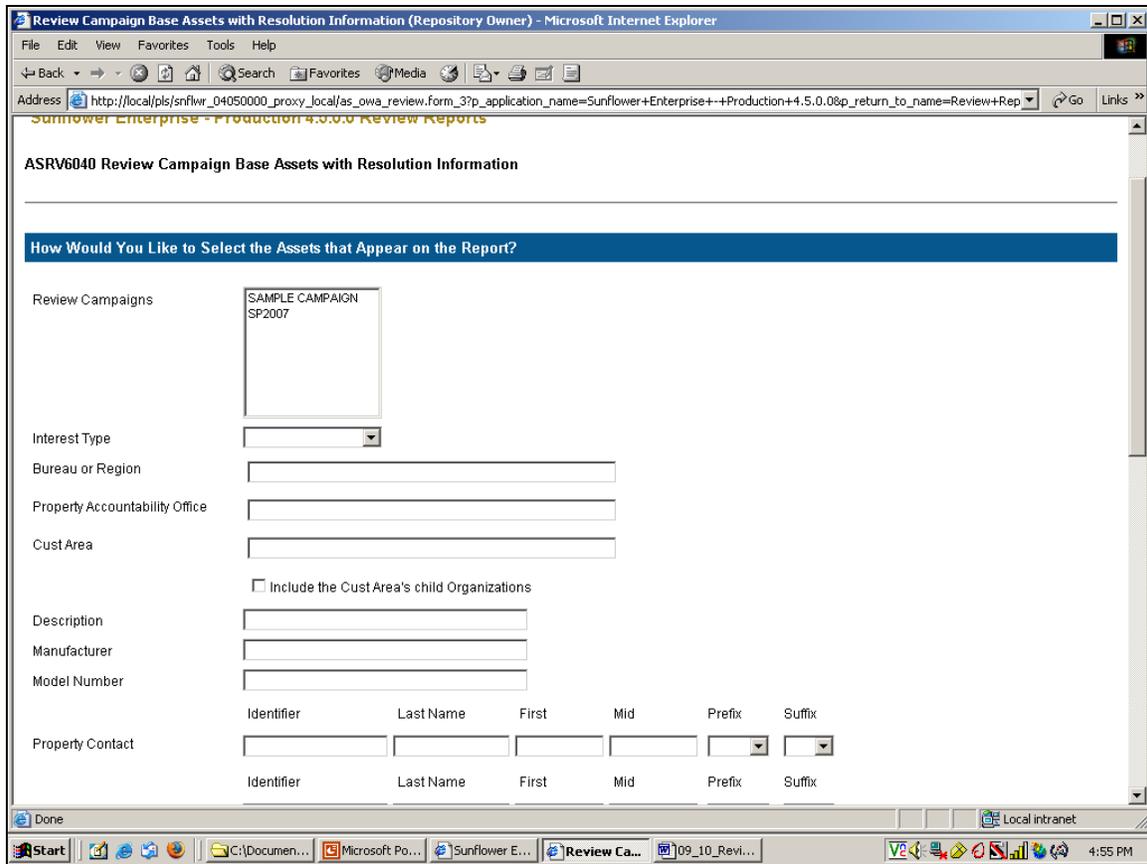
Base Asset Interface Processing Results	Review Campaign Base Assets
Current Resolutions at Different Location than Asset	Review Campaign Base Assets with Resolution Information
Executive Review Resolution Summary	Review Campaign Properties
Resolution Interface Processing Results	Review Resolution Summary
Review Accruals	Review Resolution Summary by Person

Below the grid are two additional links:

- [Previously Run Report](#)
- [Reports Main Menu](#)

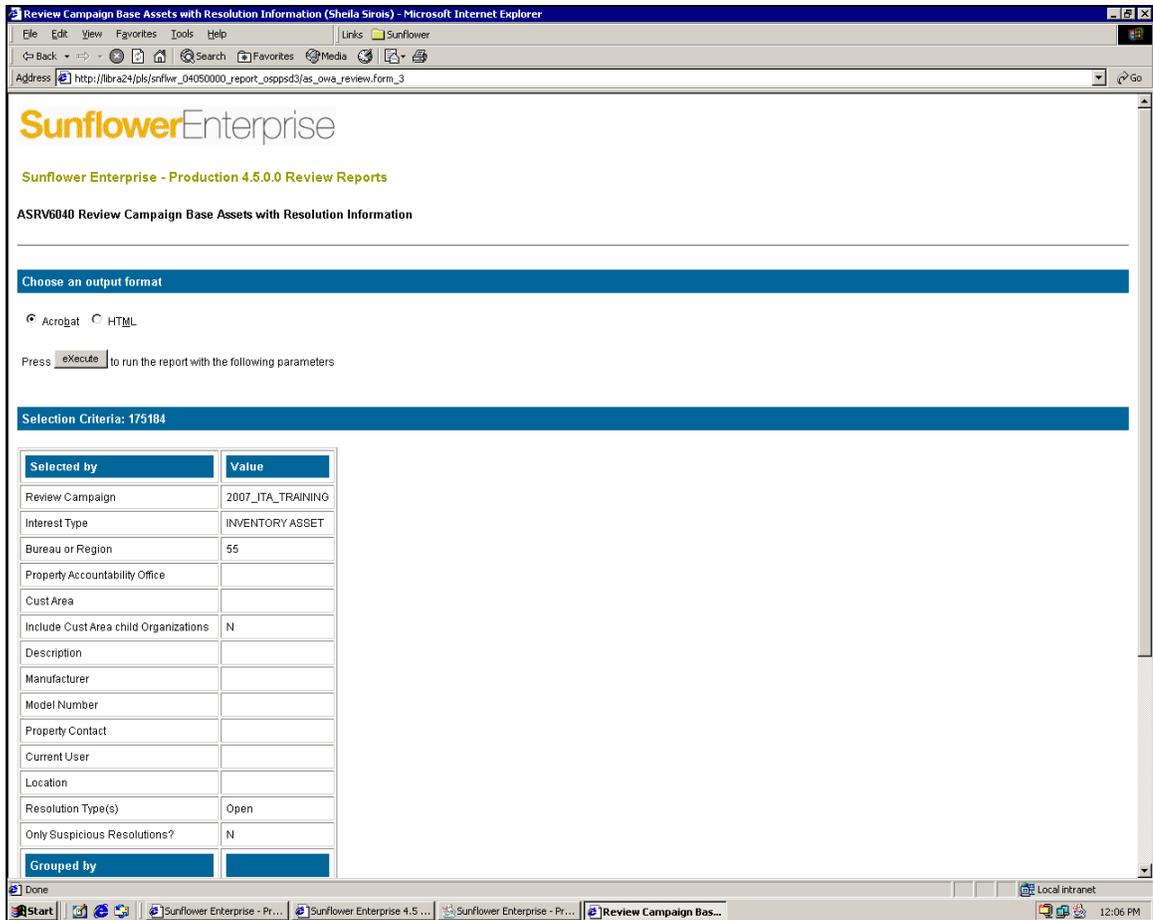
1. Select the **Review Campaign Base Assets with Resolution** link.

Result: The query criteria window is displayed.



2. Select the Review Campaign in the **Review Campaign** field.
3. Select the **Interest Type** from the pull down menu on which to report.
4. Complete the remaining fields as desired.
5. Group the assets as you desire using the **How Would You Like the Assets to be Grouped?** pull down menu.
6. Select the **Submit** button to run the report.

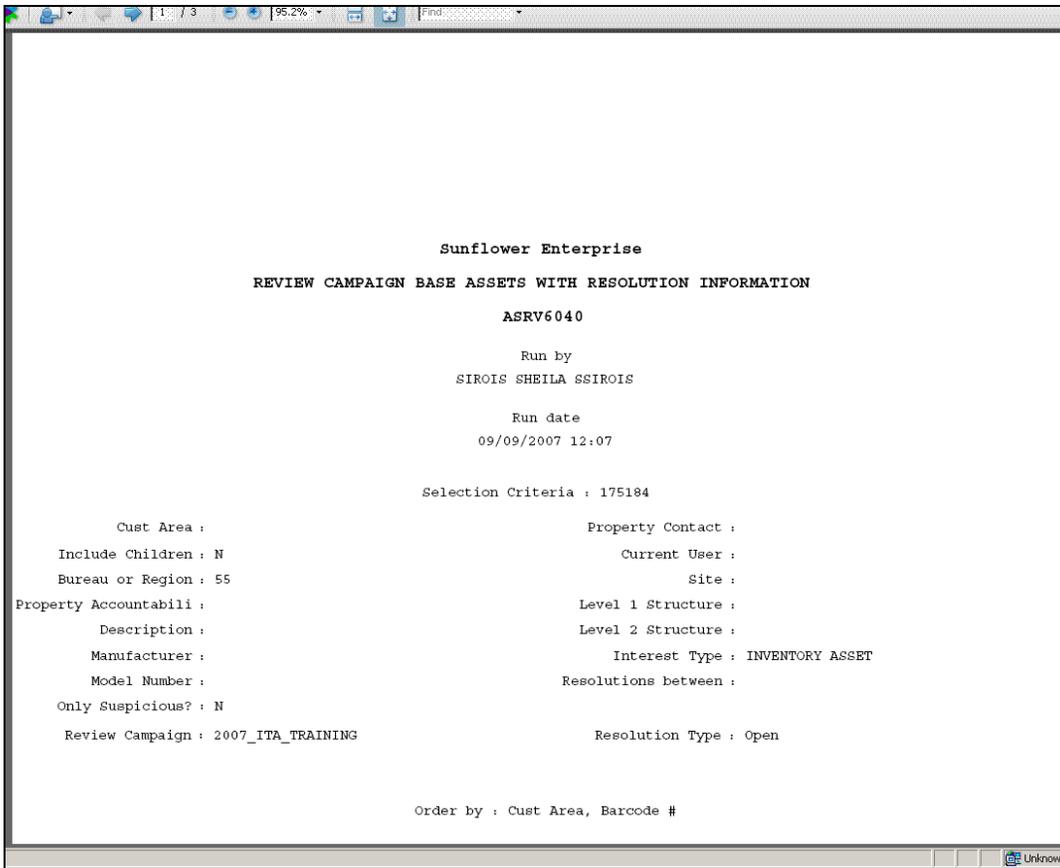
Result: The review screen appears.



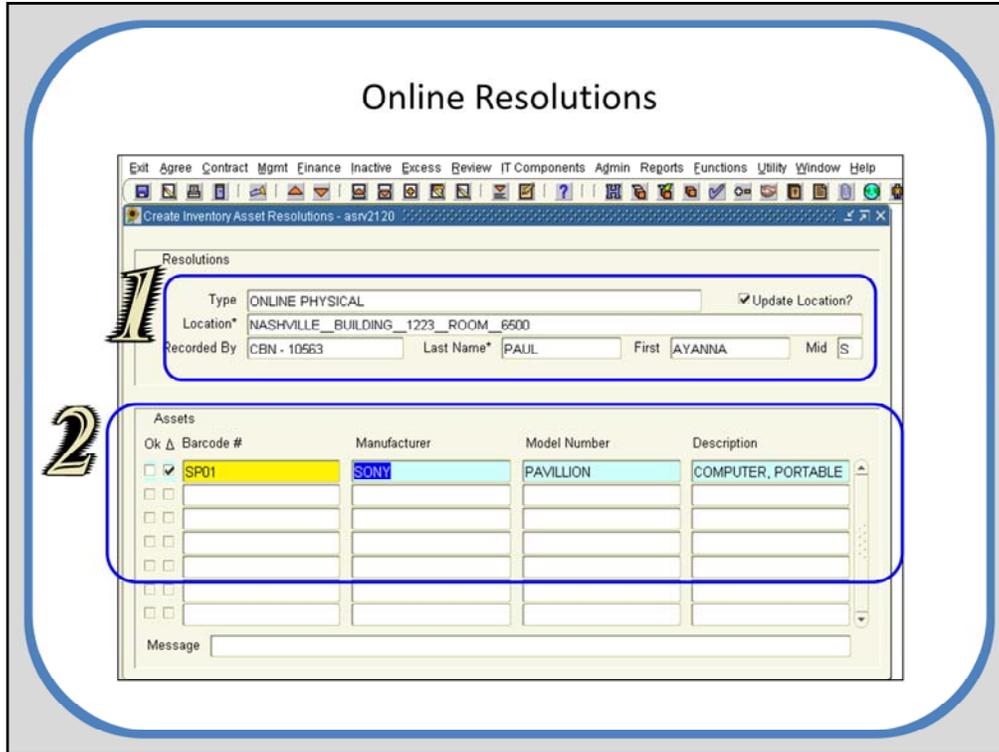
7. Select the **Acrobat** radio button.
8. Select the **eXecute** button to run the report.

Result: The report displays.

Below is a cover sheet of the **Review Campaign Base Assets with Resolution Information** report:



End of activity.



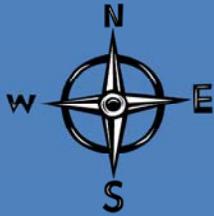
Area 1: Select the Resolution Type to be applied. When creating Online Resolutions, the following types of resolutions may be recorded:

- Confirmed Unaccounted – indicates asset not in your possession (transfer, repair, etc.) *(PMO/PAO only)*
- Declared Unaccounted – remove an open item from the reporting cycle *(PMO/PAO only)*
- Online Declarative – know the asset exist but cannot see it (e.g., an orbiting satellite) *(PC)*
- Online Physical – can not scan asset but can see and attest to physical location *(PC)*

The remaining fields in **Area 1** depend upon the type of resolution selected. In the above example, Online Physical was selected which allows the user to update the location, identify the location where the asset was found and enter who is recording the resolution. In this situation, the **Update Location** checkbox is automatically populated. This allows the location to be updated automatically on the property record. If a *Review Clerk without Inventory Clerk* responsibilities leaves this box checked an error message will appear stating “Insufficient privileges to perform the operation.” Double-click the location field to enter where the asset was found. This is a required field, even if the **Update Location** checkbox is unchecked.

Select the LOV for the **Last Name** field and select the last name, first name of the person recording the resolution.

Area 2: Resolutions may be created for one or more assets at a time. All assets listed in Area 2 will have the resolution type in Area 1 applied.



NAV: Create an Online Resolution

Record Online Resolutions

Review Manager/ Review Clerk

M > Review > Create Resolutions > Create Inventory Asset Resolutions

Create Inventory Asset Resolutions

1. Enter or select the Resolution Type in the **Type** field.
2. **Tab** to the next field. Result: The remaining fields at the top populate based upon your selection.

Type	Additional Fields to Complete
ONLINE PHYSICAL	Update Location Location Recorded By (Last Name, First Name, Mid)
ONLINE DECLARATIVE	Justification Authorized by (Last Name, First Name, Mid)
DECLARED UNACCOUNTED	Justification Authorized by (Last Name, First Name, Mid)
CONFIRMED UNACCOUNTED	Justification Authorized by (Last Name, First Name, Mid)

Record Online Resolutions

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SF 4.5

The example below is for an Online Physical resolution type:

Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@ospssd3)

Exit Agree Contract Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window

Create Inventory Asset Resolutions - asrv2120

Resolutions

Type Update Location?

Location*

Recorded By Last Name* First Mid

Assets

Ok	Barcode #	Manufacturer	Model Number	Description
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Message

3. To enter a location, open the Location screen

Sunflower Enterprise - Production 4.5.0.0 - 12/02/2009 (STUDENT01@ospssd4)

Action Edit Query Block Record Field Lookup Help Window

Maintain Locations - sacr2110

Locations

Site

BUILDING ROOM Mail Stop

Structure Level 3 Name

GPS 1 GPS 2 GPS 3

Assets

Ok	Barcode #	Manufacturer / Model / Official Name*	Location*	Stock Number	Quantity	Unit of Measure
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Message

The number assigned to the structure by the institution, e.g. 1000C

Record: 1/1 | ... | List of Valu...

4. Select the **Save** button from the toolbar to save and close the Location screen.

Result: You will be returned to the **Resolutions** window.

Resolutions

Type: **ONLINE PHYSICAL** Update Location?

Location*: ABILENE, TX_BUILDING_SMCA2_ROOM_16312

Recorded By: Last Name*: First: Mid:

Assets

Ok Δ	Barcode #	Manufacturer / Model / Official Name*	Location*	Stock Number	Quantity	Unit of Measure
<input checked="" type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

Message:

Record: 1/1

5. For Online Declarative resolutions, enter the Justification in the **Justification** field which appears when that resolution is selected.
6. **Tab** to the **Recorded By (Online)** or **Authorized By (Declarative)** field.
7. In **Recorded By**, enter the employee/badge number of the person who is responsible for the online resolution being created. If employee/badge number is not known, use the **Last Name** field to search and select the appropriate person.

Note: This person must be a contact for the organization sponsoring the review campaign (i.e. Bureau). Any other people used will not create a valid resolution.

8. Select the **Next Block** icon to the Assets block.
9. Select the **Barcode Number** field and enter the barcode number of the asset for which you want to record an online resolution. If the exact barcode number is not known, or a known list of assets are to be inventoried in the same locations, select the **Find** button and use the pop-up **Query Criteria** screen to find the assets you want to record an online resolution for.

10. Enter the query criteria and select **Execute** to populate the screen with a list of assets.

Ok	Barcode #	Manufacturer / Model / Official Name*	Location*	Stock Number	Quantity	Unit of Measure
<input checked="" type="checkbox"/>	CD0001757753	DELL INC. __OPTIPLEX 740 __DESKTOP	WASHINGTON, DC __BUILDING			EA
<input type="checkbox"/>	CD0001758369	DELL INC. __OPTIPLEX 740 __DESKTOP	WASHINGTON, DC __BUILDING			EA
<input type="checkbox"/>	CD0001758679	DELL INC. __OPTIPLEX 740 __DESKTOP	WASHINGTON, DC __BUILDING			EA
<input type="checkbox"/>	CD0001759028	DELL INC. __OPTIPLEX 740 __DESKTOP	WASHINGTON, DC __BUILDING			EA
<input type="checkbox"/>	CD0001759888	DELL INC. __OPTIPLEX 740 __DESKTOP	WASHINGTON, DC __BUILDING			EA
<input checked="" type="checkbox"/>	CD0001760110	DELL INC. __OPTIPLEX 740 __DESKTOP	WASHINGTON, DC __BUILDING			EA
<input type="checkbox"/>	CD0001760194	DELL INC. __OPTIPLEX 740 __DESKTOP	WASHINGTON, DC __BUILDING			EA
<input checked="" type="checkbox"/>	CD0001760241	DELL INC. __OPTIPLEX 740 __DESKTOP	WASHINGTON, DC __BUILDING			EA
<input type="checkbox"/>	CD0001762847	DELL INC. __OPTIPLEX 740 __DESKTOP	WASHINGTON, DC __BUILDING			EA

11. When only specific assets on the list that populates are to be inventoried, *uncheck* the box next to those assets *not* to be updated with the inventory location.

12. Select the **Save** icon from the toolbar to save the record.

Result: The **Message** field will indicate the record is **Complete** and the **OK** box will be checked next to those assets updated.

Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@osppsd3)

Exit Agree Contract Mgmt Entry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window

Create Inventory Asset Resolutions - asrv2120

Resolutions

Type ONLINE PHYSICAL Update Location?

Location* WASHINGTON, DC _BUILDING _HCHB _ROOM _100

Recorded By 270537 Last Name* AARON First SHARON Mid L

Assets

Ok	Barcode #	Manufacturer	Model Number	Description
<input checked="" type="checkbox"/>	CDSAPS0011	DELL INC.	1100	PRINTER, LASER
<input type="checkbox"/>				

Message Complete

End of activity.



Create an Online Physical Resolution for the laptop you created with the barcode # CD01MMDDYYXX (where MM/DD/YY=Month, Day, Year, and XX=Your student number).

Retire Unlocated Assets

- Asset still missing?
- Follow process in Chapter 11: Retire Assets (Lost, Damaged, Destroyed)

Lesson Summary

- You should now be able to:
 - Use MobileTrak to create resolutions
 - Use Online Forms to create resolutions
 - Resolve outstanding resolutions



Chapter 10: Dispose (Excess) Assets

Sunflower Assets 4.5

Lesson Objectives

- At the end of this lesson you should be able to:
 - Recognize the major differences between the HCHB, Domestic and International processes when disposing assets
 - Summarize the steps used to create an excess request
 - Generate transfer requests for HCHB Moving Contractor and Central Locations
 - Generate excess requests for property
 - Generate Excess/Inactive Receiving Form (Report)
 - Generate Assets with Pending Excess/Inactive Requests Report
 - Withdraw excess requests
 - Review excess assets available for redeployment
 - Reserve excess asset for redeployment
 - Accept excess asset for redeployment

Sunflower Excess Capabilities

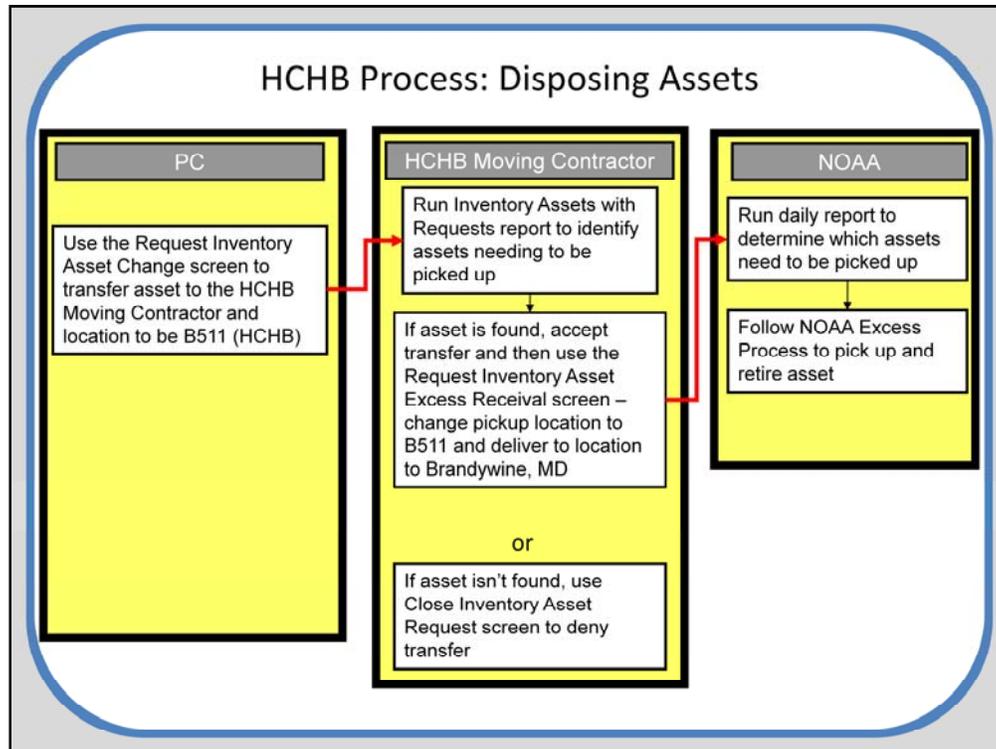
04 - USABLE



In Sunflower Systems, the process of disposing an asset is referred to as **excess**. In Sunflower Systems, PCs in the HCHB and Domestic offices generate a transfer request, which kicks off a series of events ending in the asset going to the NOAA Warehouse (either being picked up by NOAA or shipping the asset to NOAA). The NOAA Warehouse process involves scanning the asset which transfers responsibility for the item from the transferring Custodial Area to the NOAA Warehouse. The NOAA Warehouse creates an Excess asset within Sunflower. The Sunflower System provides the capability to:

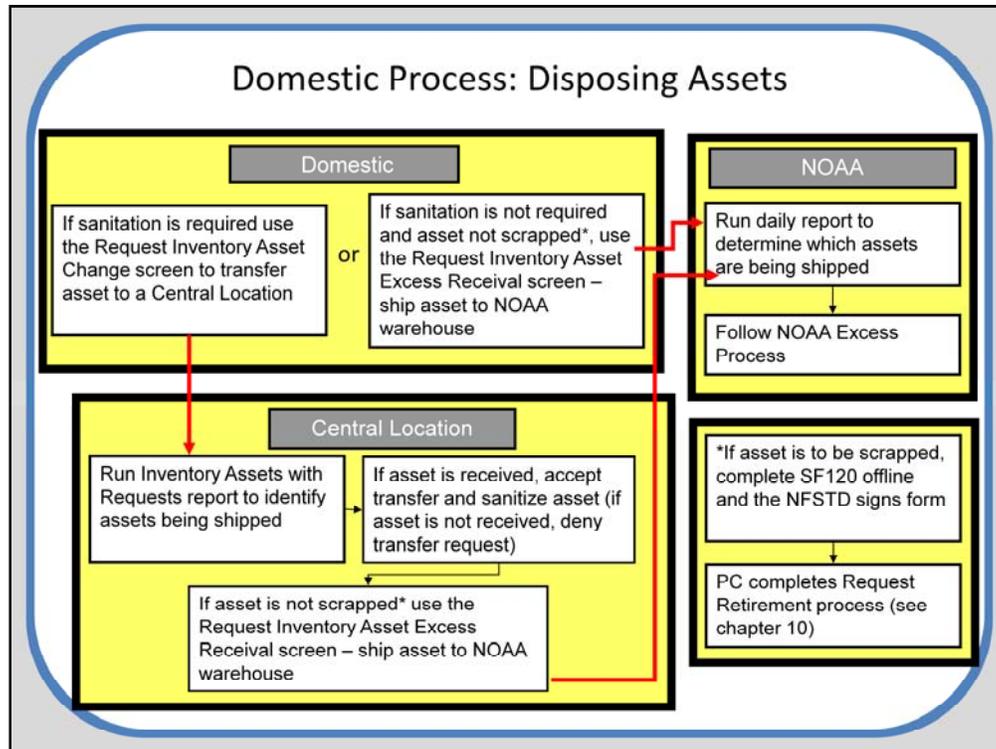
- Deny excess requests;
- Withdraw requests so that the assets may be utilized elsewhere within the DOC;

Additionally if the asset being disposed is located in the International offices, the PC completes the CD52 to request the asset be retired with the supporting documentation regarding sale or scrap and the PMO then approves the request which retires the asset.



HCHB:

The PC will follow the **Transfer Request** process to request a transfer of the asset being disposed to HCHB Moving Contractor in B511. HCHB Moving Contractor runs daily reports to determine assets needing to be picked up. If the asset is found, they then accept the transfer request and complete the Request Inventory Asset Excess Receival request screen to have NOAA pick up the asset for excess. If the asset is not found, then HCHB Moving Contractor denies the transfer request. Once NOAA picks up the asset and follows their excess process, the asset is picked up and excessed and the property record in Sunflower is updated with the appropriate information.

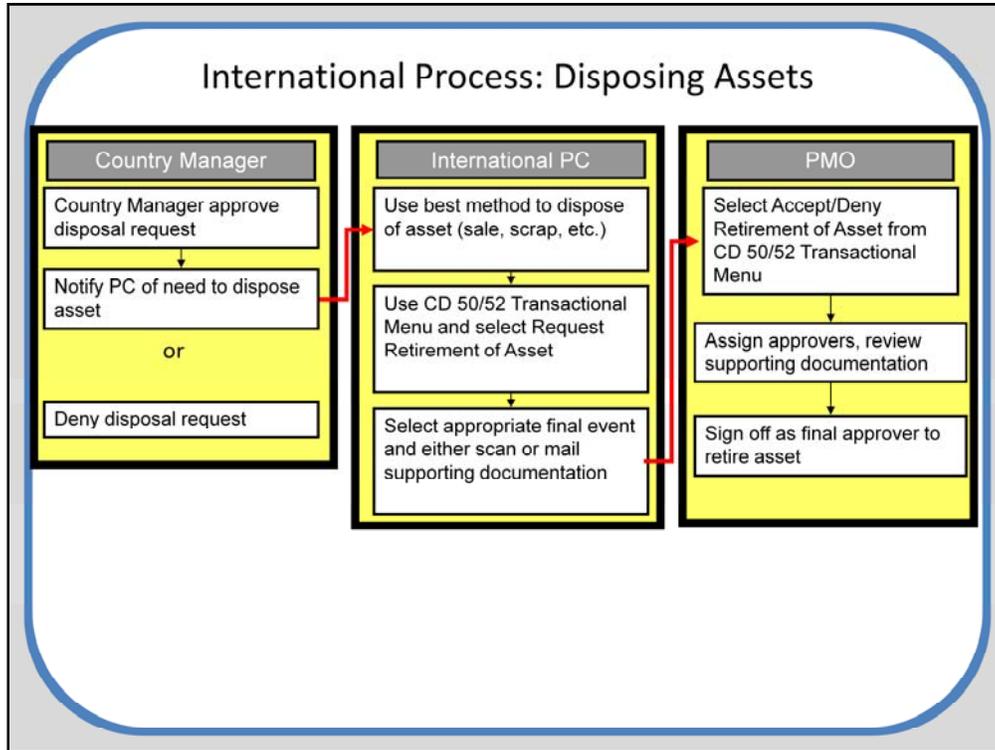


Domestic:

If asset needs to be sanitized the PC requests a transfer of the asset to the Central Location responsible for sanitizing assets and then ships the asset. The Central Location will deny the transfer request if the asset is not received. Once the asset is sanitized the Central Location completes the Request Inventory Asset Excess Receival screen and ships the asset to the NOAA warehouse.

If the asset does not require sanitation and will be scrapped locally, then the PC should first complete the SF-120 form and have the director of the National Field Services Team sign and approve the form. The PC must remove all government tags and markings and properly dispose of the asset. There is also a Disposition Certification form that the PC must complete to certify that the above has been done. These documents should be either attached to the retirement request or sent under a separate cover to the PMO for review.

Once the asset has been received at the NOAA Warehouse, they follow their Excess process to complete the Excess Request. The property record in Sunflower will be updated with the appropriate information.



International:

The Country Manager must first approve the request to dispose of an asset. If he/she denies the request they notify the user.

The PC is responsible for disposing of the asset using the best method (sale, scrap, etc.). The PC will use the CD 50/52 Transactional Menu in Sunflower to select Retirement of Asset. The PC will enter the barcode number and other necessary information. If the PC can scan and attach the supporting documentation, he/she will do so, otherwise the PC will mail the supporting documentation.

The PMO will then use the CD 50/52 Transactional menu in Sunflower and select Accept/Deny Retirement of Asset. Once they have selected approvers and reviewed the supporting documentation, they will approve the disposal of the asset. The property record in Sunflower is then updated to reflect the new status.

For the steps on **Requesting Retirement of Asset** and **Accept/Deny Retirement Request**, please refer to **“Chapter 11: Retire Assets (Lost, Damage, Destroyed).”**



NAV: Request Inventory
Asset Change for Excess

Request Inventory Asset Change for Excess

Inventory Clerk
M > Mgmt > Request Inventory Asset Change
Request Inventory Asset Change

1. To enter the information about where/who you want the asset transferred to, fill in the below fields in the **Request Information** portion of the screen.

Note: You do not have to enter all of the information below – only the information you know.

Field	Description
Cust Area	Enter the Custodial Area where the asset will be transferred to and Tab . <u>Note:</u> For HCHB, select HCHB Moving Contractor . For Domestic, select the appropriate Central Location .
Property Custodian	Defaults based on the Custodial Area entered
Contact ID	If known, select the Last Name from the list of values, and then select a First name from the LOV. This will automatically

	populate the Contact ID's badge number in the Custodian field. <u>Note:</u> The requested Custodian must be different than the Custodian currently listed on the record. You will not be able to save the record if these are the same.
User	If known, select the Last Name of the User from the list of values, and then select a First name from the LOV. This will automatically populate the User's badge number in the User field. <u>Note:</u> The requested User must be different than the User currently listed on the record. You will not be able to save the record if these are the same.
Location	Select this field to launch the Location sub-form. For HCHB select B511 . For Domestic, select the appropriate Central Location .

2. Select the blue-highlighted **Barcode Number** field in the **Assets** portion of the screen.
3. Enter the barcode number of the property record to be changed, and then **Tab** out of the field.

Result: The following fields will be autofilled based upon the decal number selected.

Field	Description
Manufacturer	The standard manufacturer name
Model Number	The applicable standard model number
Official Name	The Official Name assigned to the asset's Manufacturer/Model Number combination in the property catalog

4. Enter additional barcode numbers in the **Barcode Number** fields if more than one asset is being excessed.
5. Select the **Save** button from the toolbar to save your work.

Result: The transfer request will be sent to either the HCHB Moving Contractor or Central Location who will be receiving the asset.

6. Review the **Message** field at the bottom of the screen to ensure that the request was successfully completed without errors.



Request to transfer the Dell Inspiron 3500 laptop, barcode # CD01MMDDYYXX (where MM=Month, DD=Day, YY=Year and XX=Student Number) to the HCHB Moving Services custodial area.

Assets with Pending Requests

Sunflower Enterprise ASMB6040		Inventory Assets With Requests					Page 2 of 4 09/13/2007 21:21	
Requested Cust Area : 55001A002								
Barcode #	Flags	Description	Manufacturer	Model Number	Serial Number	Asset Value	Eff Date	
CDGAP0014	0	SERVER, AUTOMATIC R433 560000000	DELL INC.	1400 POWEREDGE	CDGAP0014	\$ 4,800.00	09/09/2007	
Current Cust Area : 55001A001					Requested Cust Area : 55001A002		- 09/13/2007	
Current Property Con :					Requester : SIROIS SHEILA SSIROIS			
					Phone Number :			
					Requested Property Cont :			
					Requester :			
					Phone Number :			
Current Current Use : MOGRATH CHRIS 26933					Requested Current User :			
					Requester :			
					Phone Number :			
Current Location : WASHINGTON, DC BUILDING : HCHB					Requested Location :			
					Requester :			
					Phone Number :			
CDGAP0013	0	PROJECTOR, DIGITAL	DELL INC.	1100MP DLP	CDGAP0013	\$ 950.00	09/09/2007	
Current Cust Area : 55001A001					Requested Cust Area : 55001A002		- 09/13/2007	
Current Property Con :					Requester : SIROIS SHEILA SSIROIS			
					Phone Number :			
					Requested Property Cont :			
					Requester :			
					Phone Number :			
Current Current Use : MOGRATH CHRIS 26933					Requested Current User :			
					Requester :			
					Phone Number :			
Current Location : WASHINGTON, DC BUILDING : HCHB ROOM : 11					Requested Location :			
					Requester :			
					Phone Number :			

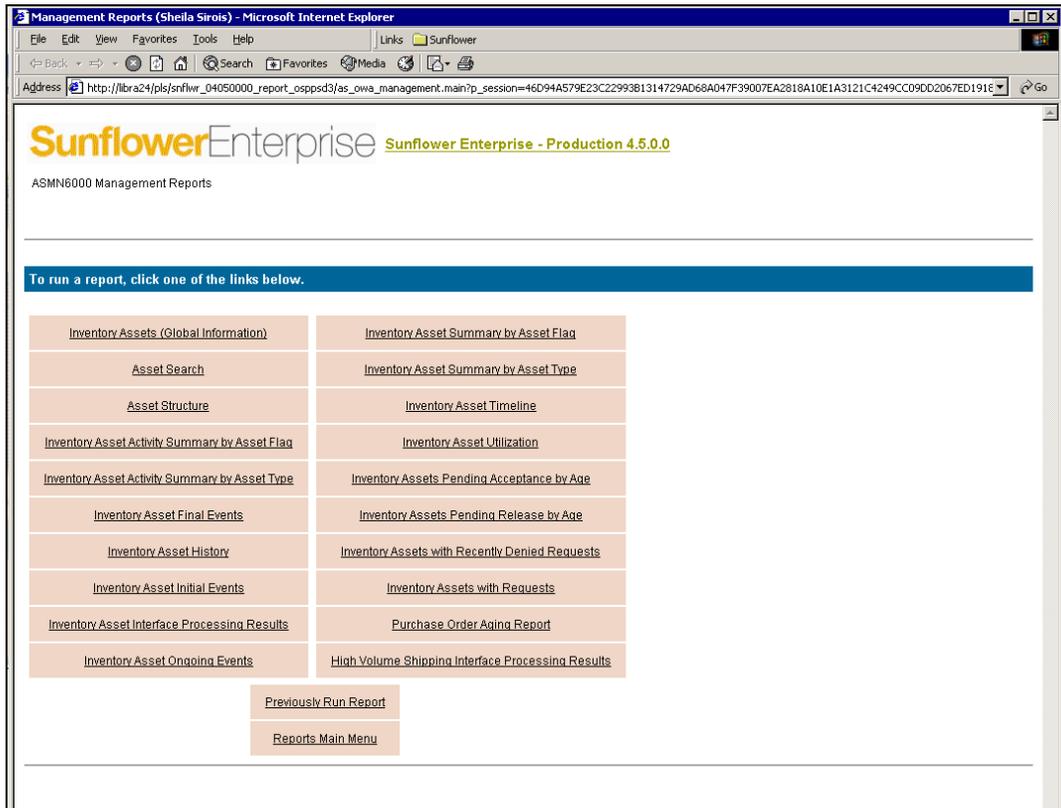
The HCHB Moving Contractor and Central Locations will run the **Inventory Assets with Requests** report to identify which assets are being transferred or sent to them for excess. The HCHB Moving Contractor will use this report to identify which assets to go pick up. The Central Location will run this report to identify which assets are being shipped to them.



NAV: Inventory Assets with Requests for Excess

Generate Report for Inventory Assets with Requests

Inventory Clerk
M > Mgmt > Management Reports
Management Reports



1. Select **Inventory Assets with Requests**.

Result: The **Inventory Assets with Request** parameters are displayed:

2. Enter your Custodial Area in the **Requested Cust Area** field to view all assets being transferred to you.

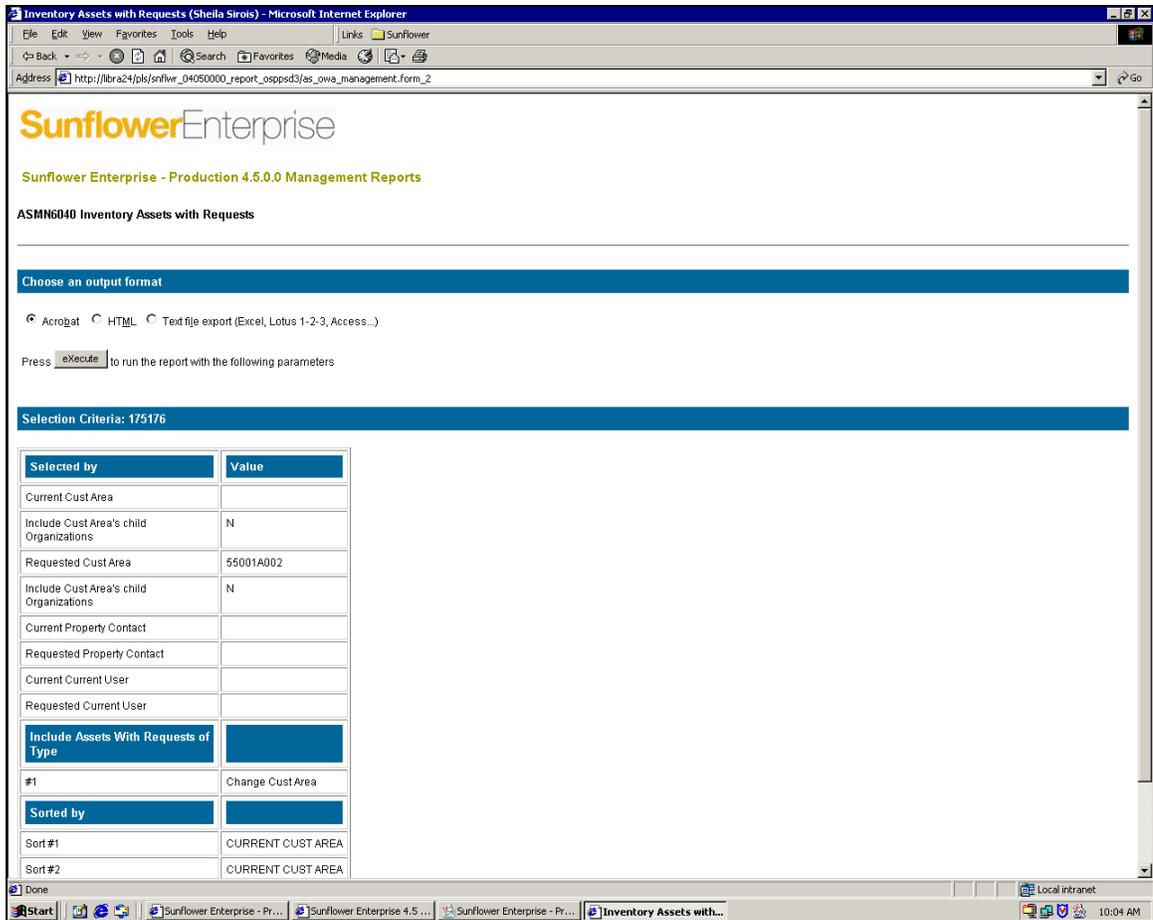
Note: HCHB will enter the HCHB Moving Contractor custodial area and Domestic will enter the Central Location custodial area.

3. Select the type of request(s) from the **Include Which of the Following?** area.

Note: To view asset requests to your area, select **Change Cust Area Requests**. You must select at least one of these boxes to run the report.

4. Sort as needed.
5. Select the **Submit** button.

Result: A window displays that allows you to review the report parameters:



6. Select the **Acrobat** radio button.
7. Review your parameters and select the **eXecute** button.

Result: A report is opened in a separate window.

Requested Cust Area : 55001A002

Barcode #	Flags	Description	Manufacturer	Model Number	Serial Number	Asset Value	Eff Date
CDSAPS0002	S 0	LAPTOP COMPUTER	DELL INC.	1150 INSPIRON		\$ 1,150.00	09/08/2007
Current Cust Area : 55001A001				Requested Cust Area : 55001A002			- 09/09/2007
				Requester : SIROIS SHEILA SSIROIS			
				Phone Number :			
Current Property Con :				Requested Property Cont :			
				Requester :			
				Phone Number :			
Current Current Use :				Requested Current User :			
				Requester :			
				Phone Number :			
Current Location : WASHINGTON, DC				Requested Location :			
BUILDING : RONALD REAGAN ROOM : B800				Requester :			
				Phone Number :			
CDSAPS0001	S 0	LAPTOP COMPUTER	DELL INC.	1150 INSPIRON		\$ 1,150.00	09/08/2007
Current Cust Area : 55001A001				Requested Cust Area : 55001A002			- 09/09/2007
				Requester : SIROIS SHEILA SSIROIS			
				Phone Number :			
Current Property Con :				Requested Property Cont :			
				Requester :			
				Phone Number :			
Current Current Use :				Requested Current User :			
				Requester :			
				Phone Number :			
Current Location : WASHINGTON, DC				Requested Location :			
BUILDING : RONALD REAGAN ROOM : B800				Requester :			
				Phone Number :			
Total :						2 \$	2,300.00
Report Total :						2 \$	2,300.00

End of activity.

Close Inventory Asset Request

Assets

Barcode # CDSAPS0005

Manufacturer / Model / Official Name*
DELL INC __INSPIRON 3500__MICROCOMPUTER, RACKMOUNT

Model Name

Serial Number

Drawing No.

A - Accept
D - Deny
W - Withdraw

A D W

Custodial Area 55001A002

Prop Contact

Current User

Location

Message Complete

In **Area 1**, either the HCHB Moving Contractor or the Central Location will enter the asset's **barcode number**.

In **Area 2**, they will either select **A** for **Accept** or **D** for **Deny**. The request is accepted if the HCHB Moving Contractor was able to find and pick up the asset and if the Central Location received the asset. The request is denied if the asset was either not able to be picked up by the HCHB Moving Contractor, or was never received by the Central Location.



NAV: Close Inventory Asset
Request for Excess

Close Inventory Asset Request for Excess

Inventory Clerk

M > Mgmt > Close Inventory Asset Requests

Close Inventory Asset Requests

Screenshot of the Sunflower Enterprise software interface showing the 'Close Inventory Asset Requests' form. The form includes fields for Barcode #, Manufacturer / Model / Official Name*, Model Name, Serial Number, and Drawing No. Below these are checkboxes for A (Accept), D (Deny), and W (Withdraw) for Custodial Area, Prop Contact, Current User, and Location. A Message field is also present at the bottom.

1. In the **Barcode Number** field, enter the barcode number of the asset to be transferred and **Tab** out of the field.

Result: The following fields will be autofilled based upon the decal number selected.

Field	Description
Manufacturer/Model/Official Name	The manufacturer, model number and official name of asset.
Model Name	The model name of the asset.
Serial Number	The serial number assigned by the manufacturer.
Drawing No.	The drawing number of the asset.

2. Select the appropriate checkbox next to each of the below rows.

Select:

- **A** to Accept

- **D** to Deny (select if asset is not available for pickup or asset was never received)

Field	Description
Custodial Area	The applicable custodial area for the HCHB Moving Contractor or the Central Location receiving the asset.
Property Contact	The name of the new property contact.
User	The name of the new user.
Location	The new location.

3. Select the **Save** button from the toolbar to save your work.

Result: The transfer request is accepted/ denied.

4. Review the **Message** field at the bottom of the screen to ensure that the excess request was successfully completed without errors.

Screenshot of Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURF@ospd3) interface. The window title is "Close Inventory Asset Requests - asmn2040". The main content area is titled "Assets" and contains the following form fields:

- Barcode #: CDSAPS0005
- Manufacturer / Model / Official Name*: DELL INC. __INSPIRON 3500__ MICROCOMPUTER, RACKMOUNT
- Model Name: [Empty]
- Serial Number: [Empty]
- Drawing No.: [Empty]
- Radio buttons: A - Accept (checked), D - Deny, W - Withdraw
- Custodial Area: 55001A002
- Prop Contact: [Empty]
- Current User: [Empty]
- Location: [Empty]
- Message: Complete

End of activity.

Request Excess

Request Information:

Excess in-place?

Pick-up Location * WASHINGTON, DC_BUILDING_HCHB_ROOM_B511

Deliver-to Location * BRANDYWINE, MD_BUILDING_WAREHOUSE_ROOM_WHSE

Assets

Ok	Δ	Barcode #	Manufacturer	Model Number	Description
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDSAPS0006	DELL INC.	INSPIRON 3500	MICROCOMPUTER, RACK

Request No. 47243

Asset Condition 4 USED - MAJOR REPAIRS NOT REQUIRED

Comment

Message Complete

The HCHB Moving Contractor and Central Locations will use the **Request Inventory Asset Excess Receival** screen to request an asset be excessed.

Area 1 Enter information about where the asset should be picked up. Only change this field if it is different than what is currently on the property record.

- For HCHB, select the Pick-up Location as B511 and the Deliver-to Location as Brandywine, MD.
- For Domestic, select the Pick-up Location as the Domestic Location (if no sanitization is required) or the Central Location (if sanitization is required) and the Deliver-to Location as Brandywine, MD.

Area 2 Enter the **Barcode Number**, **Asset Condition**, and **Comments** here (an example of a comment might be: "Contact Tina Sedgwick at 202-555-1212 for important information about this asset.") The **Request Number** will be automatically generated once the record is saved.

Important Note: Take note of the **Request Number** once you save the record. This number will be used to generate the **Excess Receival Report**. If you do not note the request number, however, you can run the **Assets with Pending Excess/Inactive Requests** report to determine which assets are pending excess pickup.

Note: You cannot print an Excess Receival Report Form directly from this screen. You must run the report **Excess/Inactive Receival Form** to print the request. (The request number can be used to filter the report.) This form may be required in the future to be attached to the property item in order for the item to be picked up.



NAV: Create Excess
Request in Sunflower

Create Excess Request in Sunflower

Inventory Clerk

M > Excess > Request Excess Receive > Request Inventory Asset Excess Receive
Request Inventory Asset Excess Receive

The screenshot shows the Sunflower Enterprise software interface. The title bar reads "Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@osppsd3)". The menu bar includes: Exit, Agree, Contract, Mgmt, Sentry, Finance, Inactive, Excess, Review, IT Components, Admin, Reports, Functions, Utility, Window. The toolbar contains various icons for file operations and navigation. The main window title is "Request Inventory Asset Excess Receive - asex2120".

The form is divided into two main sections:

- Request Information:** Contains a checkbox for "Excess in-place?", a text field for "Pick-up Location *", and a text field for "Deliver-to Location *".
- Assets:** Contains a table with columns: Ok, Barcode #, Manufacturer, Model Number, and Description. Below the table are fields for "Request No", "Asset Condition", "Comment" (with a scrollable text area), and "Message".

1. Double click on the **Pick-up Location** field and enter the Location. **Save** the Location record when complete.

Note: For HCHB, select B511. For Domestic, select the appropriate Domestic Location or Central Location (if asset needed to be sanitized).

2. Double click on the **Deliver-to Location** field and enter Brandywine, MD. **Save** the location record when complete.
3. In the **Barcode Number** field, enter the decal number of the asset that is to be excessed and **Tab**.

Result: The catalog and condition details will be autofilled.

4. Optionally, use the **Asset Condition** field to change the condition of the asset by selecting a value from the LOV.

5. Optionally, enter **Comments** (e.g. instructions to the driver, special handling instructions, etc.)
6. Select the **Save** button from the toolbar to save your work.
7. Review the **Message** field at the bottom of the screen to ensure that the request was successfully completed without errors.
8. Make a note of the **Request Number** so you can keep track of the request.

Note: You will use the Request Number to print the Excess Receipt Form.

The screenshot shows a software window titled "Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@ospd3)". The main window is titled "Request Inventory Asset Excess Receipt - asex2120".

Request Information

- Excess in-place?
- Pick-up Location * WASHINGTON, DC_BUILDING_HCHB_ROOM_B511
- Deliver-to Location * BRANDYWINE, MD_BUILDING_WAREHOUSE_ROOM_WHSE

Assets

Ok	Barcode #	Manufacturer	Model Number	Description
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> CDSAPS0006	DELL INC.	INSPIRON 3500	MICROCOMPUTER, RACK

Request No

Asset Condition USED - MAJOR REPAIRS NOT REQUIRED

Comment

Message

End of activity.



Create an excess request in Sunflower for the second asset you created in Chapter 3 - Barcode # CD02MMDDYYXX (where MM=Month, DD=Day, YY=Year and XX=Student Number).

Make note of the **Request Number:** _____

Excess Receipt Form

Excess Receipt Form

SeaFlores Enterprise
Excess Receipt Form
09/20/2007 14:54

45258

Request No : 45258
Requester : ERIC STANIS ERIC
Date : 09/20/2007

Phone :
Alternate Phone :

Barcode # : 001 0000000000000
Manufacturer : OPTIMUM TECHNOLOGIES CORPORATION
Description : OPTICAL READER, SERIAL, HAND HELD

Model Number : 7000
Part Supply : GENERAL PURPOSE ALICE SERIAL
Weight : OPTIMUM, PORTABLE AND STURDY
Date :

Quantity :
Description :
Serial Number : 2490000024
Flag : 0
Status : R1
Region :
Cost Area : FLORIDA
Property :
Contact :
Asset : HPD OR DESIGD

Value : 0
Acquisition Date : 08/28/2005
Property : FLORIDA
Inventory :
Status :
Phone :
Alternate Phone :

Originator
ELIZAB CANTALAN
WILKINSON, SC
WILKINSON - MOB ROOM - 1111

Deliver-to Location
WILKINSON, MD
WILKINSON - WAREHOUSE

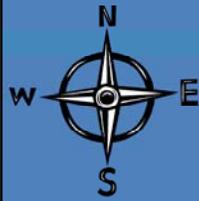
Comments :

MANAGER'S WARE APPROVAL _____ DATE _____

TRANSPORTATION APPROVAL _____ DATE _____

ASSET CENTER REPRESENTATIVE APPROVAL _____ DATE _____

The **Excess Receipt Form** serves as a print out of the excess pick-up request and can be affixed to property items for excess pickup. In the future, DOC may require this form to be attached to assets being sent to the NOAA warehouse.



NAV: Generate
Excess/Inactive Receival Form

Generate Excess Receival Form

Inventory Clerk
M > Excess > Excess Reports
Excess Reports

Sunflower Enterprise Sunflower Enterprise - Production 4.5.0.0

ASEX6000 Excess Reports

To run a report, click one of the links below.

Excess Assets (Global Information)	Excess Asset Ongoing Events
Asset Reservations	Excess Asset Summary by Asset Flag
Asset Search	Excess Asset Summary by Asset Type
Asset Structure	Excess Asset Timeline
Assets with Pending Excess/Inactive Requests	Excess Assets
Excess Asset Activity Summary by Asset Flag	Excess Interface Records Processing Results
Excess Asset Activity Summary by Asset Type	Excess Review Categories
Excess Asset Final Events	Excess/Inactive Receival Form
Excess Asset Initial Events	Purchase Order Aging Report

[Previously Run Report](#)

[Reports Main Menu](#)

1. Select **Excess/Inactive Receival Form**.

Result: The **Excess/Inactive Receival Form** parameters window displays:

Excess/Inactive Receival Form (Sheila Sirois) - Microsoft Internet Explorer

Sunflower Enterprise

Sunflower Enterprise - Production 4.5.0.0 Excess Reports

ASMN6110 Excess/Inactive Receival Form

How Would You Like to Select the Assets that Appear on the Report?

Interest Type/Barcode #

Request No

Cust Area

Include the Cust Area child Organizations

Property Contact

Identifier	Last Name	First	Mid	Prefix	Suffix
<input type="text"/>					

Current User

Identifier	Last Name	First	Mid	Prefix	Suffix
<input type="text"/>					

Requester

Identifier	Last Name	First	Mid	Prefix	Suffix
<input type="text"/>					

Interest Type to Print With Request

Include Only Assets With an Active Interest

Include Barcode

Request

Excess Requests

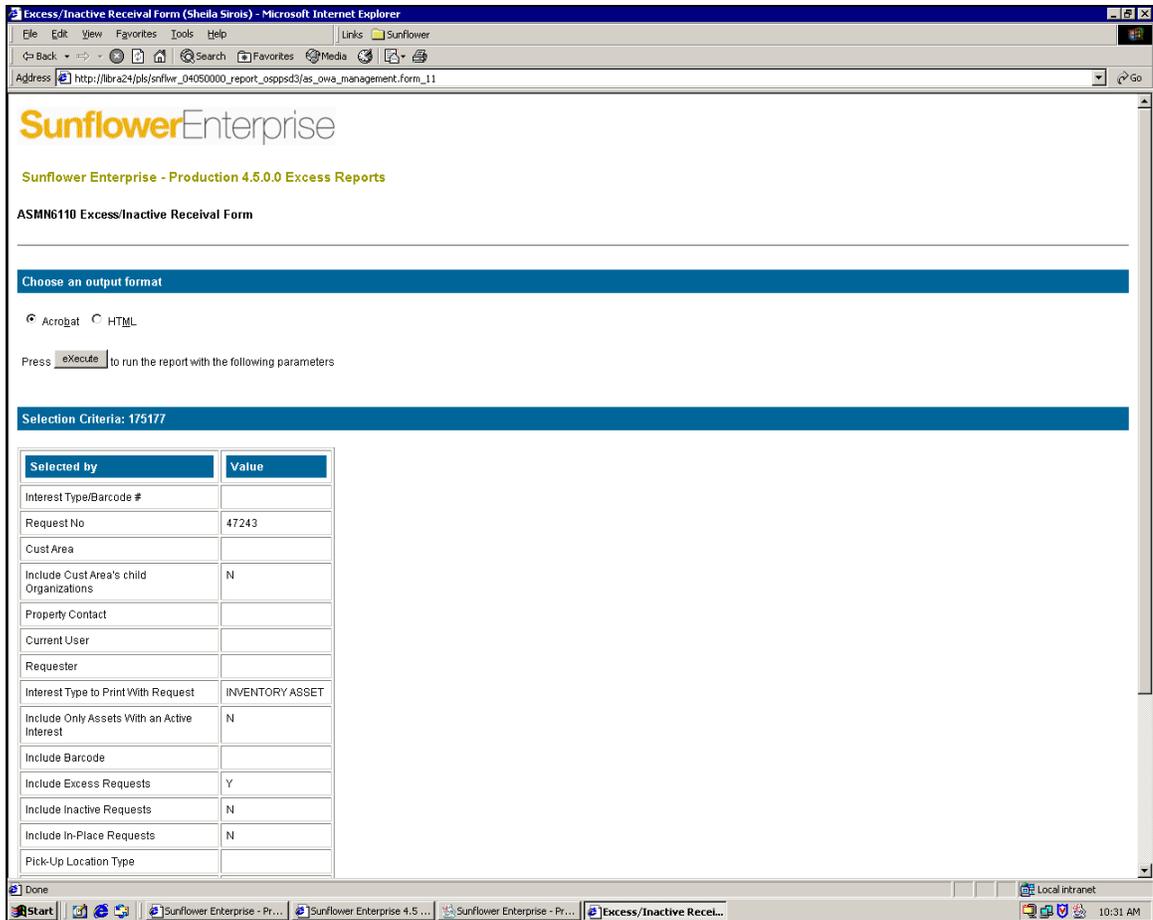
Inactive Requests

In-Place Requests

Include Only Requests Recorded Between (MM/DD/YYYY) and (MM/DD/YYYY)

2. Specify the **Request No** of the request for Excess Asset.
3. Uncheck the **Inactive Request**, **In-Place Request** boxes.
4. Select the **Submit** button.

Result: A window displays that allows you to review the report parameters:



5. Select the **Acrobat** radio button.
6. Review your parameters and select the **eXecute** button.

Result: A report is opened in a separate window.



Generate the Excess Receival form using the request number from your previous lab.

Assets with Pending Excess/Inactive Requests Report

Request No	Barcode #	Flags	Description	Manufacturer	Model Number	Serial Number	Asset Value	
47243	ENV CDGARS000C	E O	MICROCOMPUTER, EACHPC007	DELL INC.	INSPIRON 3500		3,500.00	
Asset Condition : 4 USED - MAJOR REPAIRS NOT REQUESTED Cust Area : 55014401 Property Comment : Current User : MCGRATH CHRIS 249333 Pick-up Location : WASHINGTON, DC BUILDING : HCHB ROOM : 8511								
Request : EXCESS SERIAL Requester : SHREVE SHRELA SHREVE Requester Phone : Deliver-to Location : SEAWINDS, MD BUILDING : WAREHOUSE ROOM : WHEE							- 09/09/2007	
Total :							1	\$ 3,500.00
Report Total :							1	\$ 3,500.00

The **Assets with Pending Excess/Inactive Requests** report can be used by the HCHB Moving Contractor, Domestic PC, or the Central Location to determine which assets still have pending excess requests. This will be helpful in determining if the NOAA Warehouse has received the assets yet.



NAV: Generate Report for
Assets with Pending Excess
Requests

Generate Report for Assets with Pending Excess Requests

Excess Clerk
M > Excess > Excess Reports
Excess Reports

Sunflower Enterprise Sunflower Enterprise - Production 4.5.0.0

ASEX6000 Excess Reports

To run a report, click one of the links below.

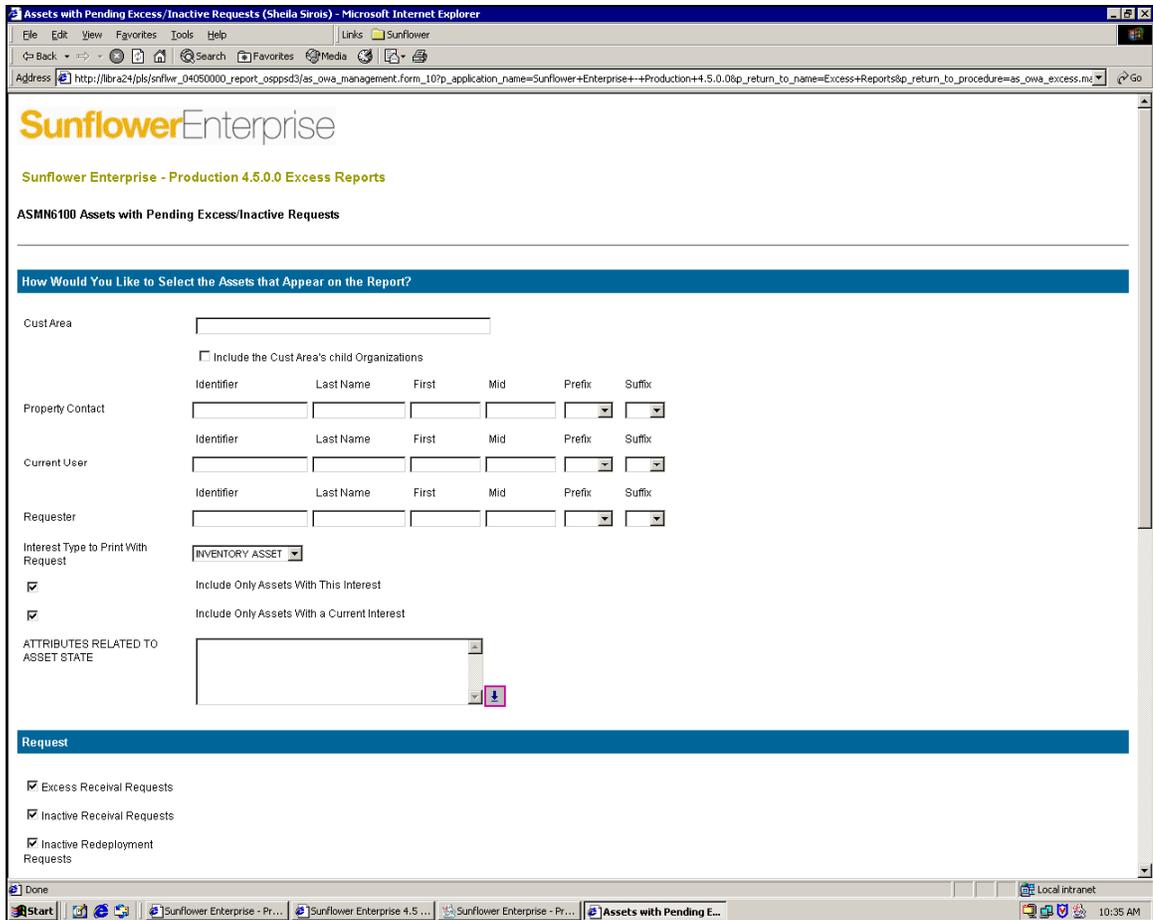
Excess Assets (Global Information)	Excess Asset Ongoing Events
Asset Reservations	Excess Asset Summary by Asset Flag
Asset Search	Excess Asset Summary by Asset Type
Asset Structure	Excess Asset Timeline
Assets with Pending Excess/Inactive Requests	Excess Assets
Excess Asset Activity Summary by Asset Flag	Excess Interface Records Processing Results
Excess Asset Activity Summary by Asset Type	Excess Review Categories
Excess Asset Final Events	Excess/Inactive Receipt Form
Excess Asset Initial Events	Purchase Order Aging Report

[Previously Run Report](#)

[Reports Main Menu](#)

1. Select **Assets with Pending Excess/Inactive Requests**.

Result: The **Assets with Pending Excess/Inactive Requests** parameters window displays:



2. In the **Include Only Request Recorded Between** fields (scroll down the page to view), specify the *Date Range* of the request for Excess Assets.
3. Specify the **Pick-Up Location** information of the request for Excess Assets.

Note: Select HCHB Moving Contractor or Central Location.

4. Select the **Submit** button.

Result: A window displays that allows you to review the report parameters:

The screenshot shows a Microsoft Internet Explorer browser window displaying the Sunflower Enterprise web application. The page title is "Assets with Pending Excess/Inactive Requests (Sheila Sirois)". The browser address bar shows the URL: http://libra24/pls/snflwr_04050000_report_ospsps3/as_owa_management.form_10.

The main content area displays the Sunflower Enterprise logo and the text "Sunflower Enterprise - Production 4.5.0.0 Excess Reports". Below this, the report title "ASMNG100 Assets with Pending Excess/Inactive Requests" is shown.

A blue bar prompts the user to "Choose an output format". Two radio buttons are present: "Acrobat" (which is selected) and "HTML". Below this, a button labeled "eXecute" is visible, with the text "Press eXecute to run the report with the following parameters".

Another blue bar indicates "Selection Criteria: 175179". Below this is a table with two columns: "Selected by" and "Value".

Selected by	Value
Cust Area	
Include Cust Area's child Organizations	N
Property Contact	
Current User	
Requester	
Interest Type to Print With Request	INVENTORY ASSET
Include Only Assets With This Interest	Y
Include Only Assets With an Active Interest	Y
Include Excess Receival Requests	Y
Include Inactive Receival Requests	N
Include Inactive Redeployment Requests	N
Include In-place Receival Requests	N
Requests Recorded Between	09/07/2007 and 09/09/2007
Include Request Comment	N

5. Select the **Acrobat** radio button.
6. Review your parameters and select the **eXecute** button.

Result: A report is opened in a separate window.

http://libra24/reports/rwservlet?cmdkey=snlwr_04050000_report_ospps3dserver=rep90_snlwr_0405 - Microsoft Internet Explorer

Links Sunflower

Address http://libra24/reports/rwservlet?cmdkey=snlwr_04050000_report_ospps3dserver=rep90_snlwr_04050000_ospps3dlimited_hdr=no&delimiter=none&destype=cachestmimetype=application%2Fpdf&mode=default&report=asmn61

Sunflower Enterprise **Assets With Pending Excess/Inactive Requests** Page 2 of 3
 ASMN6100 09/09/2007 10:39

Request No	Barcode #	Flags	Description	Manufacturer	Model Number	Serial Number	Asset Value	
47243	INV CDSAP80006	S O	MICROCOMPUTER, RACKMOUNT	DELL INC.	INSPIRON 3500		\$ 3,500.00	
Asset Condition : 4 USED - MAJOR REPAIRS NOT RQUIRED Cust Area : 55001A001 Property Contact : Current User : MOGRATH CHRIS 269333 Pick-up Location : WASHINGTON, DC BUILDING : HCHB ROOM : B511							Request : EXCESS RECEIVAL - 09/09/2007 Requester : SIROIS SHEILA SSIROIS Requester Phone : Deliver-to Location : BRANDYWINE, MD BUILDING : WAREHOUSE ROOM : WHSE	
Total :							1 \$	3,500.00
Report Total :							1 \$	3,500.00

Done

Start Sunflower Enterprise - Pr... Sunflower Enterprise 4.5... Sunflower Enterprise - Pr... http://libra24/reports... 10:39 AM

End of activity.

Withdraw Excess Requests

Screenshot of the Sunflower Enterprise software interface showing the 'Withdraw Excess Receival Request' screen. The screen displays a table with columns for 'Ok Request No.', 'Barcode #', 'Manufacturer', 'Model Number', and 'Description'. A row is highlighted with a blue box around the 'Ok Request No.' field, which contains the value '47243'. Other fields in the row are filled with 'NV.CDSAPS0006', 'DELL INC.', 'INSPIRON 3500', and 'MICROCOMPUTER, RA'. Below the table, there are fields for 'Asset Condition' (value: 4), 'Pick-up Location' (value: WASHINGTON, DC_BUILDING_HCHB_ROOM_B511), 'Deliver-to Location' (value: BRANDYWINE, MD_BUILDING_WAREHOUSE_ROOM_WHSE), and a 'Comment' field. A 'Message/Complete' field is at the bottom.

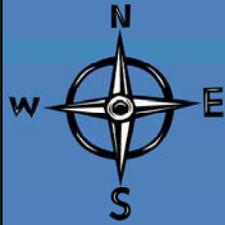
Use the **Withdraw Excess Receival Request** screen to withdraw an excess pick up request.

STEP 1: Enter the **Request Number** and select **Tab**.

Result: The **Barcode Number, Manufacturer, Model,** and **Official Name** will autofill.

STEP 2: **Save** the record.

Result: The excess pick up request is withdrawn.



NAV: Withdraw Excess
Receival Request

Withdraw Excess Receival Request

Inventory Clerk

M > Excess > Withdraw Excess Receival Request

Withdraw Excess Receival Request

Screenshot of the Sunflower Enterprise software interface for the 'Withdraw Excess Receival Request' screen. The window title is 'Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@osppsd3)'. The menu bar includes Exit, Agree, Contract, Mgmt, Sentry, Finance, Inactive, Excess, Review, IT Components, Admin, Reports, Functions, Utility, and Window. The toolbar contains various icons for file operations and navigation. The main content area is titled 'Requests' and contains a table with columns: Ok Request No, Barcode #, Manufacturer, Model Number, and Description. Below the table are input fields for Asset Condition, Pick-up Location, Deliver-to Location, and a large text area for Comment. At the bottom, there is a 'Message' field.

1. Enter a value for the **Request No** (i.e. Request Number) field and **Tab**.

Result: The barcode number and catalog information is displayed.

2. Select the **Save** button from the toolbar to save your work.

Result: The **Message** field at the bottom of the screen will indicate the record is complete.

Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@osppsd3)

Exit Agree Contract Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window

Withdraw Excess Receival Request - asmn2120

Requests

Ok Request No	Barcode #	Manufacturer	Model Number	Description	
<input checked="" type="checkbox"/>	47243	INV CDSAPS0006	DELL INC.	INSPIRON 3500	MICROCOMPUTER, RA

Asset Condition: 4 USED - MAJOR REPAIRS NOT REQUIRED

Pick-up Location: WASHINGTON, DC_BUILDING_HCHB_ROOM_B511

Deliver-to Location: BRANDYWINE, MD_BUILDING_WAREHOUSE_ROOM_WHSE

Comment:

Message: Complete

Note: View the **Assets with Pending Excess/Inactive Requests** report to verify that the withdrawal request was completed.

End of activity.

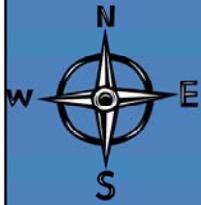


Withdraw the excess request the laptop Barcode # barcode # CD02MMDDYYXX (where MM=Month, DD=Day, YY=Year and XX=Student Number). You will need the **Request Number** previously generated.

Review Excess Assets Available for Use

Barcode #	Flag	Description	Manufacturer	Model Number	Serial Number	Asset Value	Acq Date
EXC CD000138427	S 0	MICRO COMPUTER	DELL INC.	D110/6198E	J2FG18	\$ 1,475.00	01/19/2001
		Cust Area : 54018171 Property C : PICKERING DEBRA 4662 Phone : 3013721923 Current On : Phone :		Location : BRANDEVINE, MD BUILDING : WAREHOUSE ROOM : FLOOR			
EXC CD000041669	S 0	MICROCOMPUTER, DESKTOP, TOWER, MMX-100M	DELL INC.	594 908E -47060-	5947Q	\$ 2,494.48	08/21/1995
		Cust Area : 54018171 Property C : PICKERING DEBRA 4662 Phone : 3013721923 Current On : Phone :		Location : BRANDEVINE, MD BUILDING : WAREHOUSE ROOM : EIC020			
EXC CD0000420231	S 0	LAPTOP COMPUTER	DELL INC.	XPI -155921-	89DCK7204	\$ 3,877.00	10/28/1997
		Cust Area : 54018171 Property C : PICKERING DEBRA 4662 Phone : 3013721923 Current On : Phone :		Location : BRANDEVINE, MD BUILDING : WAREHOUSE			
EXC CD0000424219	S 0	LAPTOP COMPUTER	DELL INC.	CP1 2498E -156248-	10K79	\$ 3,704.00	10/07/1998
		Cust Area : 54018106 Property C : PICKERING DEBRA L 270928 Phone : 7074484618 Current On : Phone :		Location : EUREKA, CA : : : :			
EXC CD0000424249	S 0	LAPTOP COMPUTER	DELL INC.	3800 -156148-	4LR0F01	\$ 3,256.00	04/25/2001
		Cust Area : 54018106 Property C : PICKERING DEBRA L 270928 Phone : 7074484618 Current On : Phone :		Location : EUREKA, CA : : : :			

The Asset Search Report in the Excess Menu allows users to search for available excess assets. These assets may then be requested for redeployment within your custodial area. When an asset is requested, the NOAA Warehouse Property Custodian, Debra Pickering, retires the excess asset with a final event of Redeploy. This sets the asset back as an Inventory Asset. Debra Pickering will then transfer the asset to the PC requesting the excess asset.



NAV: Excess Asset Search Report

Excess Asset Search Report

Inventory Clerk

M > Excess > Asset Search

Asset Search

Search Criteria

Manufacturer Model Number
Description Model Name
Serial Number Fed. Supply Group
Asset Value Minimum Acquisition Date FSC

Agreement Assets Excess Assets Financial Assets Inactive Assets Inventory Assets Subset Assets

Assets

Barcode #	Manufacturer	Model Number	Description

Report

1. Enter at least one field in the **Search Criteria** section on which to query assets. Use the **LOV** button to look up valid values.

Note: When searching for specific assets, search on **Manufacturer** and **Model Number**.

2. Select the **Excess Assets** checkbox to search all excess assets available for redeployment.
3. Select the **Report** button at the bottom to view the assets in a report format with property record details, including asset value.

Result: The Asset Search report fields displays.

Sunflower Enterprise

Sunflower Enterprise - Production 4.5.0.0 Excess Reports

ASMN6120 Asset Search

How Would You Like to Select the Assets that Appear on the Report?

Description

Description

Manufacturer

Model Number

Model Name

Serial Number

Fed. Supply Group

National Stock Number

Minimum Asset Value

Include Only Assets Acquired Between (MM/DD/YYYY) and (MM/DD/YYYY)

Interest Types

- ACREEMENT ASSET
- EXCESS ASSET
- FINANCIAL ASSET
- INACTIVE ASSET
- INVENTORY ASSET
- SUBSET ASSET

ATTRIBUTES RELATED TO CATALOG

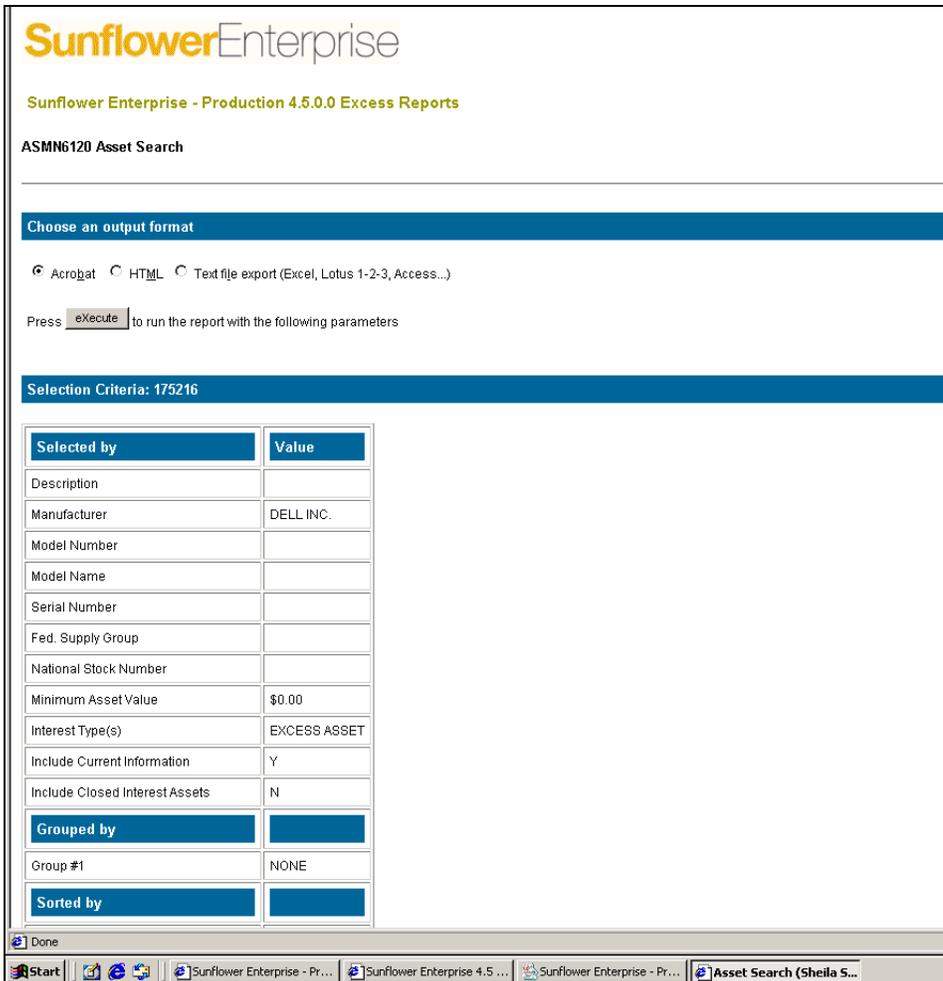
ATTRIBUTES RELATED TO ASSET STATE

Done

Start | Sunflower Enterprise - Pr... | Sunflower Enterprise 4.5... | Sunflower Enterprise - Pr... | Asset Search (Sheila S...

4. Select the **Submit** button to run the report.

Result: The review query screen displays.



5. Select the **Acrobat** radio button.
6. Select the **eXecute** button to run the report.

Result: The Asset Search Report displays. The report provides the Barcode Number with EXC in front indicating it is an excessed asset. The property description, manufacturer, model number, serial number, asset value and acquisition date are also included on the report.

Barcode #	Flags	Description	Manufacturer	Model Number	Serial Number	Asset Value	Acq Date
EXC CD0001338427	S O	MICRO COMPUTER	DELL INC.	GX110/600MHZ	JXFD10B	\$ 1,473.00	05/19/2001
		Cust Area : 54001N371 Property C : PICKERIGN DEBRA 4662 Phone : 3013722923 Current Us : Phone :			Location : BRANDYWINE, MD BUILDING : WAREHOUSE ROOM : FLOOR		
EXC CD0000619690	S O	MICROCOMPUTER, DESKTOP, TOWER, MINI-TOWER	DELL INC.	586 90MHZ -47060-	5847Q	\$ 2,494.48	08/21/1995
		Cust Area : 54001N371 Property C : PICKERIGN DEBRA 4662 Phone : 3013722923 Current Us : Phone :			Location : BRANDYWINE, MD BUILDING : WAREHOUSE ROOM : EXCESS		
EXC CD0000620231	S O	LAPTOP COMPUTER	DELL INC.	XPI -155021-	8SQZK7204	\$ 3,877.00	10/28/1997
		Cust Area : 54001N371 Property C : PICKERIGN DEBRA 4662 Phone : 3013722923 Current Us : Phone :			Location : BRANDYWINE, MD BUILDING : WAREHOUSE :		
EXC CD0000624219	S O	LAPTOP COMPUTER	DELL INC.	CPI 266MHZ -156248-	2CKTS	\$ 2,704.00	10/07/1998
		Cust Area : 54015M106 Property C : RICHIE DEBRA L 270928 Phone : 7074435610 Current Us : Phone :			Location : EUREKA, CA : :		
EXC CD0000624269	S O	LAPTOP COMPUTER	DELL INC.	3800 -156148-	4LE2F01	\$ 1,258.00	04/25/2001
		Cust Area : 54015M106 Property C : RICHIE DEBRA L 270928 Phone : 7074435610 Current Us : Phone :			Location : EUREKA, CA : :		

7. Review the Report for excess assets available for redeployment within your Custodial Area.

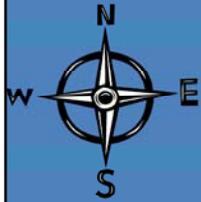
End of activity.



Run the report to search for assets available.

Make note of one of the Barcode Numbers of excess assets available. You will need this for a later Lab.

Barcode #: _____



NAV: Reserve an Excess
Asset for Redeployment

Result: The Excess Asset Reservation is complete.

The screenshot shows a web application window titled "Create Excess Asset Reservation - asex2020". The interface is divided into two main sections: "Asset Reservations" and "Assets".

Asset Reservations Section:

- Date: 09/13/2007 21:02:03
- Reserved by: SIROIS SHEILA SSIROIS
- Organization: 55001A001
- Phone: 202-555-1212
- Duration: 14

Assets Section:

Ok	Δ	Barcode #	Manufacturer	Model Number	Description	Number of Reservations	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CD0000624269	DELL INC	3800 ~156148~	LAPTOP COMPUTER ~156148~	1	
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
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<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						
<input type="checkbox"/>	<input type="checkbox"/>						

Message: Complete

End of Activity.



Make a request to reserve one of the assets from the Asset Search report.

Accept Excess Asset for Redeployment

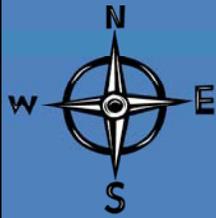
The screenshot shows the 'Maintain Inventory Assets' screen in Sunflower Enterprise. The 'Barcode #' field is highlighted with a blue box and contains the value '10SAP3000'. A large blue '2' is overlaid on the left side of the screen. The 'Bureau or Region' field is set to '55', and the 'Property Accountability Office' is set to '55001A'. The 'Cust Area' is '55001A002'. The 'User' field is '269333' and the 'Last Name' is 'MCGRATH'. The 'Location' is 'WASHINGTON, DC, BUILDING, RONALD REAGAN, ROOM, B800'. The 'Asset Value' is '\$3,500.00' and the 'Asset Condition' is '4 (USED - MAJOR REPAIRS IN)'. The 'Acquisition Date' is '09/08/2007' and the 'Effective Date' is '09/09/2007'. The 'Responsibility Date' is '09/08/2007' and the 'Expected Return Date' is blank. The 'Utilization Code' is 'IN SERVICE' and the 'Activity Type' is 'AGENCY OWNED'. The 'Accepted?' checkbox is checked. The 'Prop Custodian' is 'CHRIS'. The 'User Fields' are 'CHRIS' and 'CHRIS'. The 'Global User Fields' are blank. The 'Page 2' button is visible at the bottom.

The only time a PC will accept a transfer coming from outside his/her Bureau is when he/she has requested an excess asset be redeployed for use in their Custodial Area. The NOAA Warehouse will reinstate the asset (changes the excess asset back to an inventory asset) and use the Transfer Request process to transfer responsibility to the requesting PC. (See Chapter 7 for the Transfer Request process the NOAA Warehouse will use.)

When this happens, the PC may prefer to use the **Maintain Inventory Asset** screen because along with the custodial area changing, the PC will also have to change the bureau/region and the Property Accountability Office. All of this can be changed in the Maintain Inventory Assets screen, while using the Change Inventory Asset Information screen only allows up to the custodial area level to be changed and an extra step would be required to change the bureau/region and the Property Accountability Office.

Area 1 Enter the barcode number of the asset in the **Barcode Number** field, then **Tab**.

Area 2 Update the **Bureau or Region** and the **Property Accountability Officer**. Change the **Custodial Area, User, and Location** as necessary.



NAV: Accept Excess Asset
for Redeployment

Accept Excess Asset for Redeployment

Inventory Clerk

M > Mgmt > Maintain Inventory Assets

Maintain Inventory Assets

Inventory Assets

Barcode # Barcode Type Existing interest asset Type Barcode # Released?

Default Location* Copy to Location?

Catalog Identifier* Commodity Asset Parents Children C/P/A

Manufacturer Model Number

Description Model Name

Serial Number Drawing No.

Initial Event User Fields*

Asset Value* Acquisition Date Responsibility Date

Asset Condition Effective Date Expected Return Date

Utilization Code Flags* Activity Type

Bureau or Region Property Accountability Office

Cust Area Accepted? Property Custodian

Contact ID Last Name* First Mid

User Last Name* First Mid

Location*

Document*

User Fields*

Global User Fields*

Page 2 Commodity Comment / Picture / Attachment Re-Request

The tracking identifier assigned to the interest asset
Record: 1/1

1. Enter the barcode number of the asset you will be accepting in the **Barcode Number** field and **Tab**.

Result: The remainder of the property record auto-populates.

Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@ospssd3)

Exit Agree Contract Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Eunctions Utility Window Help

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

Barcode # Barcode Type Existing interest asset Type Barcode # Released? Y

Unique Name

Default Location*

Catalog Identifier* Commodity Asset Parents Children C/P/A

Manufacturer Model Number

Description Model Name

Serial Number Drawing No.

Initial Event User Fields*

Asset Value* Acquisition Date Responsibility Date

Asset Condition USED - MAJOR REPAIRS N Effective Date Expected Return Date

Utilization Code Flags* Activity Type

Bureau or Region Property Accountability Office

Cust Area Accepted? Y Prop Custodian

Contact ID Last Name* First Mid

User Last Name* First Mid

Location*

Document*

User Fields*

Global User Fields*

Page 2 Commodity Comment / Picture / Attachment Re-Request

2. Enter the accepting Bureau or Region in the **Bureau or Region** field to reflect the new Bureau or Region.
3. Change the Property Accountability Office in the **Property Accountability Office** field to reflect the new Property Accountability Office.
4. Change the Custodial Area in the **Cust Area** field to reflect the new Custodial Area.
5. Change the **Contact ID**, if necessary.
6. Change the **User Last Name** field to reflect new user, if necessary.
7. Double click the **Location** field to reflect the new location of the asset.
8. Update the **Site, Building and Room** fields.
9. Select the **Save** button from the toolbar to save the new location.
10. Select the **Save** button from the toolbar to save the accepted asset.

Result: The asset has been accepted and the new Bureau or Region and the other changes have been updated.

Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@ospssd3)

Exit Agree Contract Mgmt Sentry Finance Inactive Excess Review IT Components Admin Reports Functions Utility Window Help

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

Barcode #	CDSAPS0003	Barcode Type	Existing interest asset	Type	Barcode #	Released?	<input checked="" type="checkbox"/>
Unique Name							
Default Location*							
Catalog Identifier*	ITA-165397	<input type="checkbox"/> Commodity Asset	Parents	0	Children	0	C/P/A
Manufacturer	DELL INC.		Model Number	INSPIRON 3500			
Description	MICROCOMPUTER, RACKMOUNT		Model Name				
Serial Number			Drawing No.				
Initial Event	PURCHASE						
Asset Value*	\$3,500.00		User Fields*				
Asset Condition	4	USED - MAJOR REPAIRS N	Acquisition Date	09/08/2007	Responsibility Date	09/08/2007	
Utilization Code	IN SERVICE		Effective Date	09/09/2007	Expected Return Date		
Bureau or Region	55	Flags* <input checked="" type="checkbox"/> S <input type="checkbox"/> O	Activity Type	AGENCY OWNED			
Cust Area	55001A002	Accepted? <input checked="" type="checkbox"/> Y	Property Accountability Office	55001A			
Contact ID		Last Name*		Prop Custodian			
User	269333	Last Name*	MCGRATH	First		Mid	
Location*	WASHINGTON, DC _BUILDING _RONALD REAGAN _ROOM _B800						
Document*							
User Fields*							
Global User Fields*							

Page 2 Commodity Comment / Picture / Attachment Re-Request

End of activity.

Lesson Summary

- You should now be able to:
 - Recognize the major differences between the HCHB, Domestic and International processes when disposing assets
 - Summarize the steps used to create an excess request
 - Generate excess requests for property
 - Generate Excess/Inactive Receival Form (Report)
 - Generate Assets with Pending Excess/Inactive Requests Report
 - Withdraw excess requests
 - Review excess assets available for redeployment
 - Reserve excess asset for redeployment
 - Accept excess asset for redeployment



Chapter 11: Retire Assets (Lost, Damaged and Destroyed)

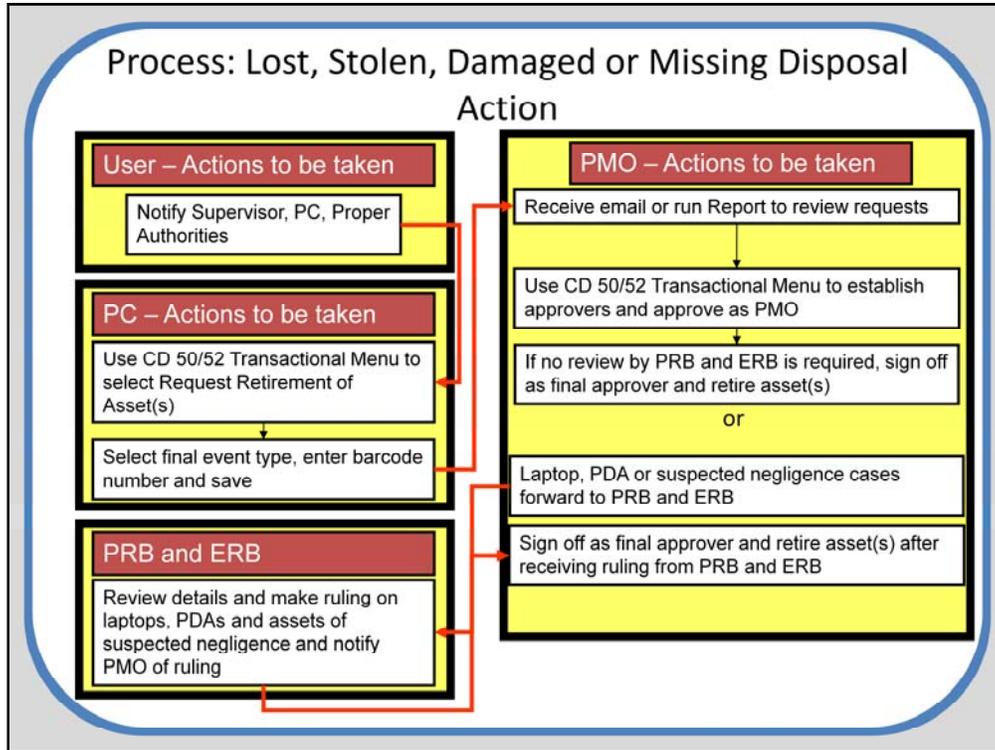
Sunflower Assets 4.5

Lesson Objectives

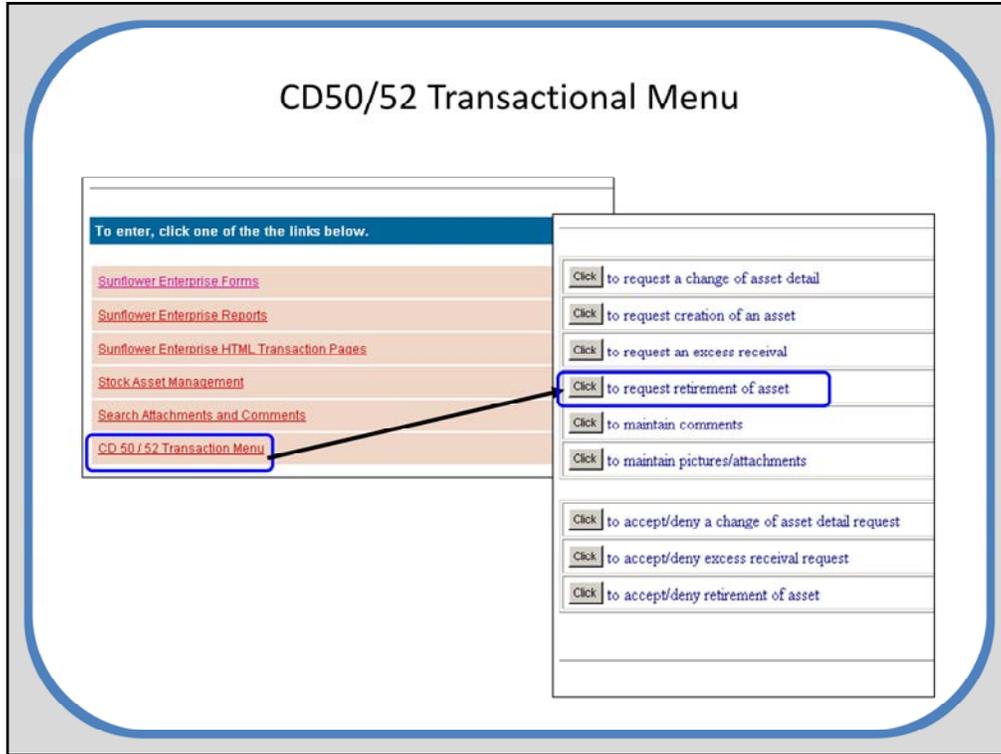
- After this lesson you should be able to:
 - Summarize the steps used to retire assets
 - Complete the CD 50 / 52 Retirement Request Form
 - Run a report to determine which assets have open retirement requests
 - Establish an approver path for retiring assets
 - Approve and Retire assets

Final Events

- Lost
- Stolen
- Missing
- Damaged
- Destroyed
- Abandoned



If an asset is either a laptop, PDA or if negligence is suspected, the information is forwarded to the Property Review Board (PRB) and the Executive Review Board (ERB) for review and investigation.



Select the CD 50 / 52 Transaction Menu from the Sunflower screen. On the CD 50 / 52 Transaction Menu, the PC selects the Request Retirement of Asset.

Request Retirement of Asset

Final Event Request

Request Date: [1/20/2009] Event Type: [ABANDONED] 

Detailed Circumstance and Justification: []

Document Number: [0450100-242]

3 Actions

2 Manually List Assets

[Bottom](#)

Enter the asset identifiers and then click the [Save] button above

Interest Type	Barcode #	Fair Market Value
INVENTORY ASSET		

Manually List Assets

[Bottom](#)

Enter the asset identifiers and then click the [Save] button above

Result	Interest Type	Barcode #	Manufacturer	Model	Description	Serial Number	Fair Market Value	Request Number
OK	INVENTORY ASSET	000420001	PALM, INC	1044DA	HAND HELD COMM/PTER		750	45261

OK: 1 asset(s) displayed, 1 were successfully processed.
Error

Area 1 In the **Final Event Request** section, PCs select the Final Event Type. Enter supporting details in the **Detailed Circumstance and Justification** field as to why the asset is being retired. The **Document Number** will link all assets on that request to that number, so that several assets can be retired at once – this will default but can be changed. Use the **Attachments** button to attach multiple supporting documents to this request. Finally, the **Print CD-52** button can be use to print out the paper CD-52. (Note: Information will only appear on the printed CD-52 when a request is saved).

Area 2 The barcode number of the asset being retired is entered in the **Manually List Assets** section. More than one asset may be retired as long as the circumstances above pertain to all assets listed. The Interest Type defaults to **Inventory Asset** and should not be changed.

Area 3 Save the Retirement Request in the **Actions** section.

Area 4 Upon successfully saving the Retirement Request, the result **OK** will appear and a **Request Number** is created. This Request Number will be used by the PMO to pull up the request. (Alternatively, the Document Number can be used to view multiple Request Numbers – this will be explained later). Once saved, the **Print CD-52** button can be used to print the document.

The image shows a screenshot of a web application interface. At the top, there is a section titled "Document Number" which contains a "Final Event Request" form. This form has the following fields: "Request Date" with the value "12/02/2009", "Event Type" with a dropdown menu showing "ABANDONED", "Detailed Circumstance and Justification" with an empty text area, and "Document Number" with the value "2455168-42". A blue rectangular box highlights the "Document Number" field. Below this section is another section titled "Attachments" which also contains a "Final Event Request" form. This second form has the same "Request Date" and "Event Type" fields. The "Detailed Circumstance and Justification" field is empty, and there is a blue rectangular box around the "Attachment" button. The "Document Number" field in this section contains the value "2455168-42".

The **Document Number** will be tied to each assets' Request Number. For example, if requesting retirement on three assets, this Document Number can be used when accepting the request to accept retirement on all three assets; rather than using three separate Request Numbers to accept retirement on all three assets.

Using the new **Attachments** button, users can attach multiple attachments. (See next page for more details).

Attachments (continued)

Maintain Pictures/Attachments

DOC ▾ Identifier Add

File Browse...

Type OTHER (ATTACHMENT) ▾

Description

View Pictures/Attachments

DOC ▾ Identifier List

Save	Delete?	Catalog?	Type	Name	Description	MIME Type	Size (Bytes)
<input type="button" value="View"/>	<input type="checkbox"/>		OTHER ▾	CD-52test1.doc	TEST DOCUMENT 1	application/msword	24064
<input type="button" value="View"/>	<input type="checkbox"/>		OTHER ▾	CD-52test25.doc	TEST DOCUMENT 25	application/msword	24064

Note that the Attachments functionality includes the ability to attach multiple attachments to retirement requests. Any attachments added to a request will apply to every asset on that request. For example, if two attachments are placed on a request with three assets, those two attachments will be linked to all three assets. **Attachments** can be deleted, as well.

Print CD-52

The screenshot shows a web browser window with the URL <https://sherdotest.ocs.doc.gov> and the page title "Request Retirement of Asset - Microsoft Internet Explorer". The page content is divided into three main sections:

- Final Event Request:** Contains input fields for "Date" (12/15/2009), "Event Type" (ABANDONED), "Detailed Circumstance and Justification", and "Document Number" (121509-2). There are "Attachment" and "Print CD-52" buttons. The "Print CD-52" button is highlighted with a blue box.
- Actions:** Contains buttons for "Save", "Enter Query", "Manually List Assets", and "New Event".
- Manually List Assets:** Includes a "Bottom" link, instructions to "Enter the asset identifiers and then click the [Save] button above", and a table of assets.

Result	Interest Type	Barcode #	Manufacturer	Model	Description	Serial Number	Fair Market Value	Request Number
Ok	INVENTORY ASSET	CDSZTEST1	DELL INC.	LAT CP 233ST	LAPTOP COMPUTER			69462

Of the 1 asset(s) displayed, 1 were successfully processed.

[Top](#)

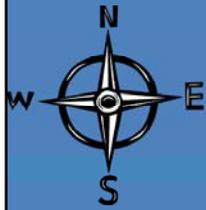
Users can print the CD-52 directly from the screen. All the information input on the screen will appear on the paper document. (See next page).

CD-52 Printed

QUANTITY (Each)	DESCRIPTION IN DETAIL	UNIT ACQUISITION COST	TOTAL COST OF UNIT	ESTIMATED PRESENT VALUE
1	CD02TR01 LAPTOP COMPUTER	2500.00	2500.00	
TOTAL			2500.00	

EXPLAIN THE CIRCUMSTANCES CAUSING REPORTED STATUS OF PROPERTY

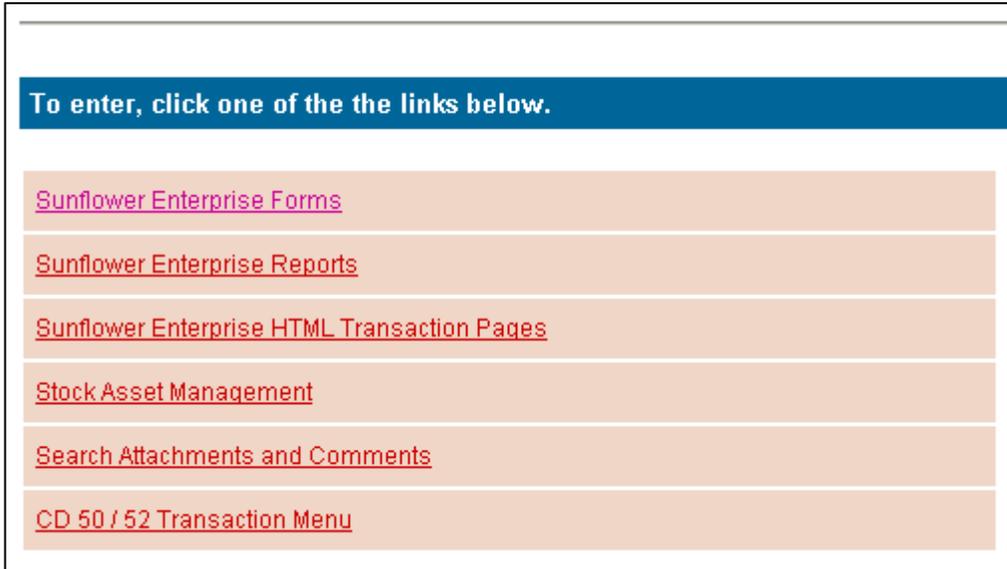
The printed report can be generated directly from the screen, as needed. All assets placed on one request will be printed on the paper CD-52.



NAV: Request Retirement of Asset

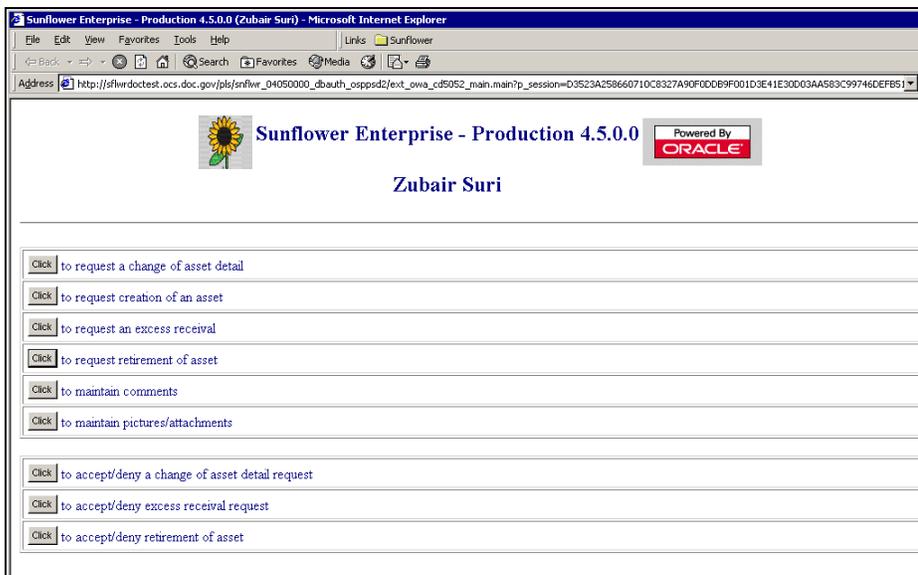
Request Retirement of Asset

Inventory Clerk / Inventory Manager
Sunflower Main Menu > CD 50 / 52 Transaction Menu
CD 50 / 52 Transaction Menu



1. Select the **CD 50 / 52 Transaction Menu**.

Result: The CD 50 / 52 Transaction Menu screen displays.



2. Select **Click to request retirement of asset**.

Result: The Final Event Request screen displays.

Final Event Request

Request Date: 12/22/2009 Event Type: ABANDONED

Detailed Circumstance and Justification: [Text Field] Attachment

Document Number: 2455188-242 Print CD-52

Actions

Save Enter Query Manually List Assets New Event

Manually List Assets

[Bottom](#)

Enter the asset identifiers and then click the [Save] button above

Interest Type	Barcode #	Fair Market Value
INVENTORY ASSET		

3. Select the **Final Event** from the **Event Type** field.
4. Complete the **Detailed Circumstance and Justification** field as they relate to the retirement request.
5. Accept the default **Document Number** or enter a new **Document Number**.
6. Attach any files related to the justification by clicking the **Attachments** button.

Result: The **Maintain Pictures/Attachments** screen displays – here you can attach multiple attachments.

Maintain Pictures/Attachments

DOC Identifier 4542524 Add

File [Text Field] Browse...

Type OTHER (ATTACHMENT)

Description [Text Field]

View Pictures/Attachments

DOC Identifier 4542524 List

No Attachments for 4542524

7. Click **Browse** to browse for attachments.

8. Once the attachment is selected, click **Add**.
9. Include a description of the attached file in the **Description** field.
10. Repeat steps 7-9 to add other attachments.
11. Close the **Maintain Pictures/Attachments** screen.
12. Enter the barcode number of the asset being retired in the **Barcode #** field.
13. If the item is being sold, enter a value of the asset in the **Fair Market Value** field. Otherwise leave this field blank.

Note 1: If more than one asset is being retired with the same information in the top half, enter additional barcode numbers in the next available blank field.

Note 2: To request retirement for a different event type, it is necessary to complete and save the request, then enter the screen again.

14. Select the **Save** button to save the retirement request.

Result: The screen shows the request was saved successfully with the OK message.

Final Event Request

Date: (MM/DD/YYYY) Event Type:

Detailed Circumstance and Justification: Attachment:

Document Number: Print CD-52:

Est. Fair Market Value: Notes:

Actions

Manually List Assets

[Bottom](#)

Enter the asset identifiers and then click the [Save] button above

Result	Interest Type	Barcode #	Manufacturer	Model	Description	Serial Number	Fair Market Value	Request Number
Ok	INVENTORY ASSET	CD000005000	XEROX CORPORATION	110V	PRINTER, LASER	WNN720029		68521

Of the 1 asset(s) displayed, 1 were successfully processed.

[Top](#)

15. Click the **Print CD-52** button to print the paper document.

Result: The paper CD-52 appears, ready to be printed.

FORM CD-52 LF (REV 11-84) DAO-217-9		U.S. DEPARTMENT OF COMMERCE		DATE 12/15/2009	
REPORT FOR REVIEW OF PROPERTY				NUMBER 121509-2	
				PRIMARY ORGANIZATION UNIT	
INSTRUCTIONS Submit a separate report for each category: Lost, stolen, destroyed, damaged, sacrificed or unserviceable property				OFFICE OR STATION REPORTING	
				LOCATION	
QUANTITY (Each)	DESCRIPTION IN DETAIL	UNIT ACQUISITION COST	TOTAL COST OF UNIT	ESTIMATED PRESENT VALUE	
1	CD52TEST1 LAPTOP COMPUTER	2500.00	2500.00		
TOTAL			2500.00		
EXPLAIN THE CIRCUMSTANCES CAUSING REPORTED STATUS OF PROPERTY					

End of activity.

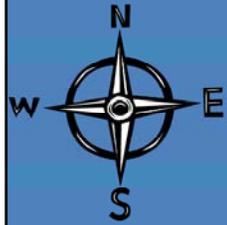


LAB: Request Retirement of Asset

Assets with Final Event Request Report

Request #	Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value						
47954	INV CD0000109095	S O	DISPLAY UNIT, CRT	AMES SCIENCE, INC.	3/90 ME-4 W/688	9058M6820	\$ 4,935.00						
Custodian : 54011M011 Property Contact : OTTO WILLIAM D 7858 User : Fair Market Value : Financial Ident.:													
Request Date : 09/11/2007 Requester : OTTO WILLIAM D 7858 Requester Phone : 3034976232 Request Status : OPEN Terminated By : Final Event Type : DELETE - CORRECTION													
Comment : The item is an old sun monitor under SE, and does not need to be tracked.													
<table border="0" style="width: 100%;"> <tr> <td style="width: 50%;"><u>Approver's Name</u></td> <td style="width: 25%;"><u>Action</u></td> <td style="width: 25%;"><u>Comment</u></td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table>								<u>Approver's Name</u>	<u>Action</u>	<u>Comment</u>			
<u>Approver's Name</u>	<u>Action</u>	<u>Comment</u>											
47972	INV CD0000290121	O	DETECTOR, GAS	TRACE ANALYTICAL, INC.	RDD2	RDD1-051592-009	\$ 10,400.00						
Custodian : 54009M003 Property Contact : HARRIS DONNA R 12790 User : Fair Market Value : \$3,000.00 Financial Ident.:													
Request Date : 09/12/2007 Requester : HARRIS DONNA R 12790 Requester Phone : 2085262329 Request Status : OPEN Terminated By : Final Event Type : TRANSFER - TO ANOTHER AGENCY BY AGENCY													
Comment : Transferred to DOE/INEL Property Reutilization & Disposal Office 9/6/07													
<table border="0" style="width: 100%;"> <tr> <td style="width: 50%;"><u>Approver's Name</u></td> <td style="width: 25%;"><u>Action</u></td> <td style="width: 25%;"><u>Comment</u></td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </table>								<u>Approver's Name</u>	<u>Action</u>	<u>Comment</u>			
<u>Approver's Name</u>	<u>Action</u>	<u>Comment</u>											

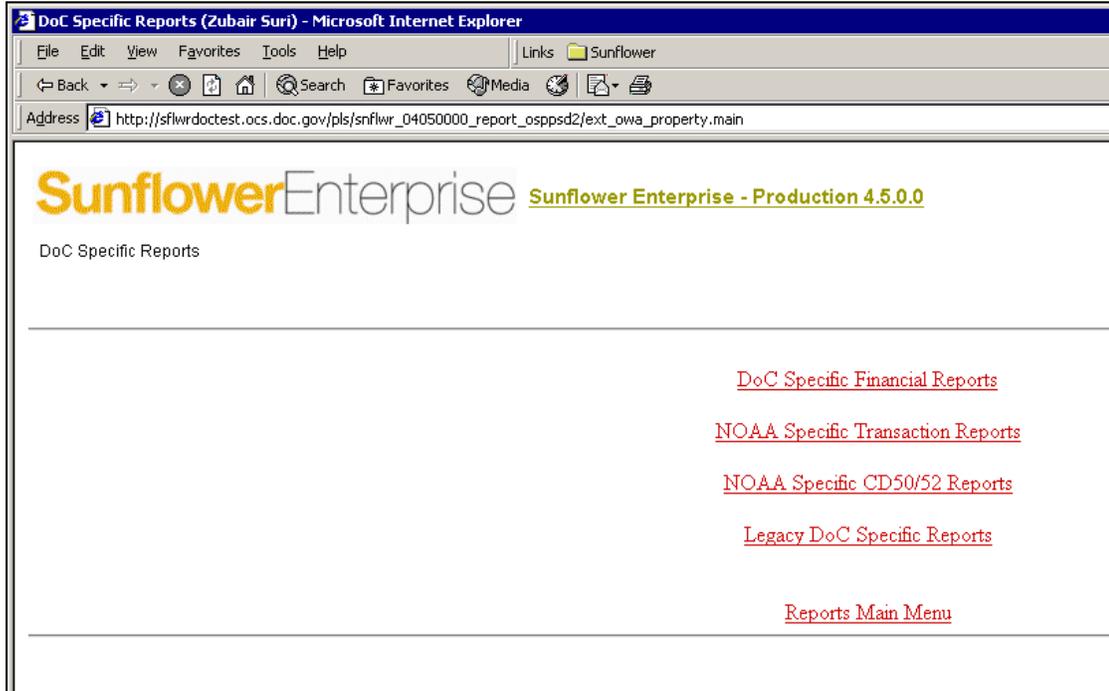
Email is sent to the PMO when a PC requests retirement of an asset. The PMO may also run a User Defined Report – **Assets with Final Event Requests** - to identify any retirement requests. The report displays the Request Number, Identifier (Barcode Number) and details of the asset. It will also display who made the request and when. Any comments the PC entered on the Request Retirement form also appear here.



NAV: Assets with Final
Event Request Report

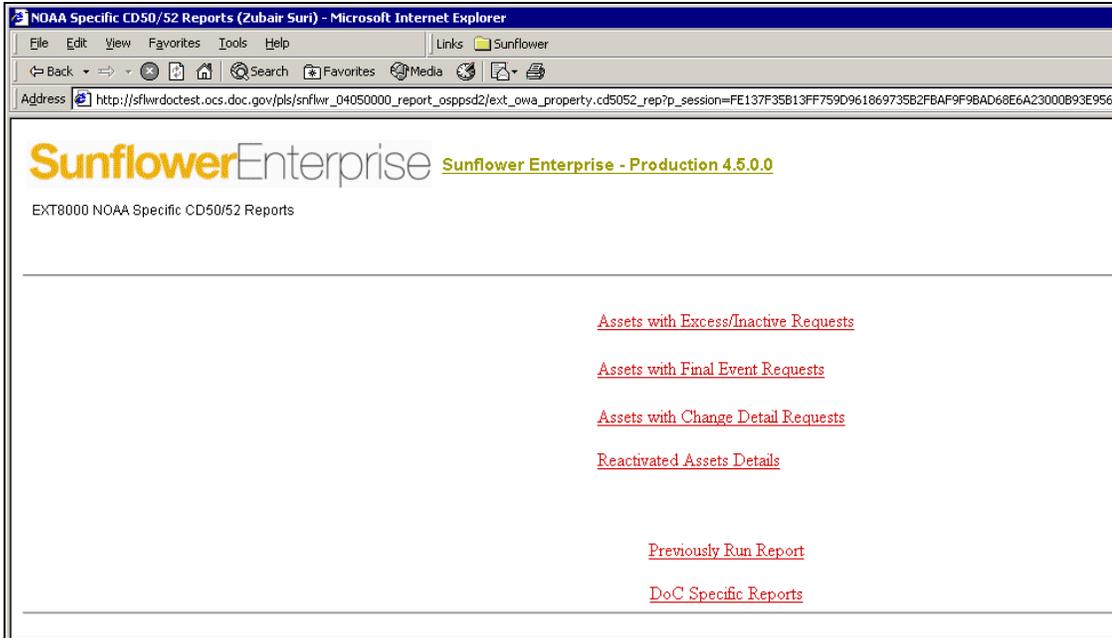
Assets with Final Event Requests Report

Inventory Clerk, Inventory Manager
M > Reports > User Defined Reports
User Defined Reports



1. Select the **NOAA Specific CD 50/52 Reports** link.

Result: The CD 50/52 Reports screen displays.



2. Select the **Assets with Final Event Requests** report link.

Note: The Assets with Final Event Requests report criteria selection screen displays.

Sunflower Enterprise - Production 4.5.0.0 NOAA Specific CD50/52 Reports

EXT8020 Assets with Final Event Requests

How Would You Like to Select the Assets that Appear on the Report?

Custodian

Include children N

Property Contact

Identifier	Last Name	First	Mid	Prefix	Suffix
<input type="text"/>					

User

Identifier	Last Name	First	Mid	Prefix	Suffix
<input type="text"/>					

Requester

Identifier	Last Name	First	Mid	Prefix	Suffix
<input type="text"/>					

Assigned Approver

Identifier	Last Name	First	Mid	Prefix	Suffix
<input type="text"/>					

Approver's Action

Request

Include Only Requests Recorded Between (MM/DD/YYYY) and (MM/DD/YYYY)

Request Status

How Would You Like the Assets to be Grouped?

How Would You Like the Assets to be Sorted?

1 2 3

1	2	3
<input type="text" value="ASSET IDENTIFIER"/>	<input type="text" value="ASSET IDENTIFIER"/>	<input type="text" value="ASSET IDENTIFIER"/>

3. Enter your name in the **Assigned Approver** fields to limit the report data to requests requiring your approval.
4. Enter the date range in **Include Only Requests Recorded Between** date fields.

Note: If a PMO is running this report rather than receiving email notification, then the report should be run on a regular basis and the date range will be shorter in duration.

5. Select how to group the data in the **How Would You Like the Assets to be Grouped?** section.
6. Select the sort order in the **How Would You Like the Assets to be Sorted?** section.
7. Select the **Submit** button to run the report.

Result: The review query criteria screen displays.

8. Select the **Acrobat** radio button.
9. Select the **eXecute** button.

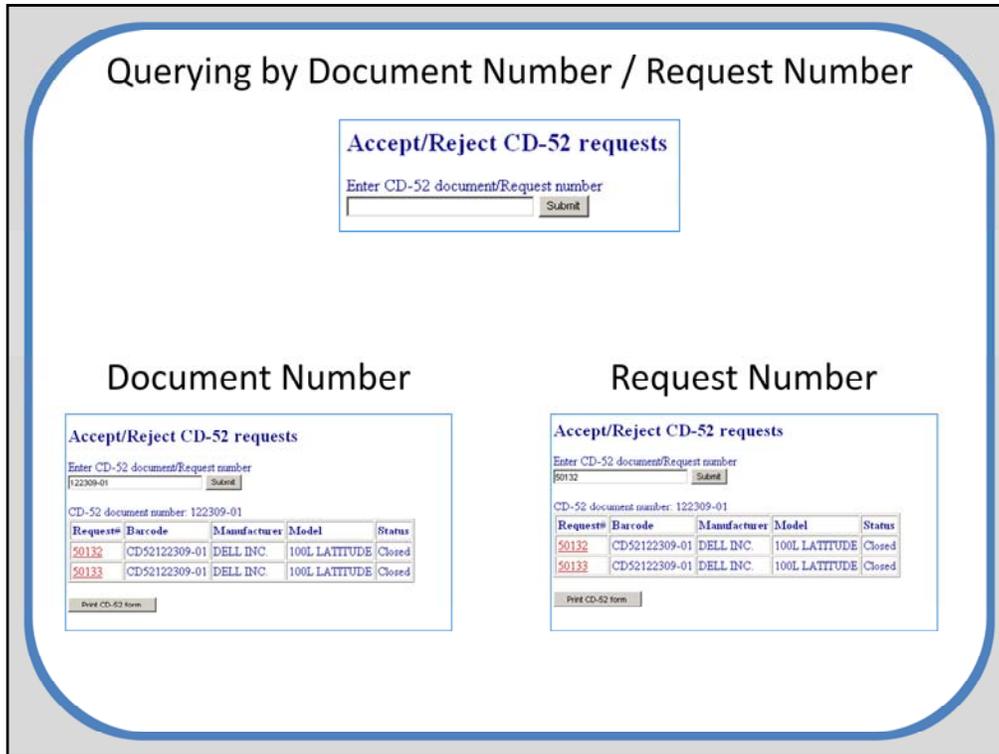
Result: The Assets with Final Event Requests report displays.

Request #	Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value
47954	INV CD0000109095	S O	DISPLAY UNIT, CRT	AMES SCIENCE, INC.	3/50 ME-4 W/688	905BM6820	\$ 4,935.00
Custodian : 54011M011 Property Contact : OTTO WILLIAM D 7858 User : Fair Market Value : Financial Ident.:							
Request Date : 09/11/2007 Requester : OTTO WILLIAM D 7858 Requester Phone : 3034976232 Request Status : OPEN Terminated By : Final Event Type : DELETE - CORRECTION							
Comment : The item is an old sun monitor under 5K, and does not need to be tracked.							
			Approver's Name	Action	Comment		
47972	INV CD0000290121	O	DETECTOR, GAS	TRACE ANALYTICAL, INC.	RGD2	RGD1-051592-009	\$ 10,400.00
Custodian : 54009M003 Property Contact : HARRIS DONNA R 12790 User : Fair Market Value : \$3,000.00 Financial Ident.:							
Request Date : 09/12/2007 Requester : HARRIS DONNA R 12790 Requester Phone : 2085262329 Request Status : OPEN Terminated By : Final Event Type : TRANSFER - TO ANOTHER AGENCY BY AGENCY							
Comment : Transferred to DOE/INEL Property Reutilization & Disposal Office 9/6/07							
			Approver's Name	Action	Comment		

End of activity.



LAB: Assets with Final
Event Request Report



The PMO or other approver uses the **CD 50 / 52 Transactional Menu** and selects the option **click to Accept/Deny Retirement Requests** to approve or deny a user's request to retire an asset.

When adding Approvers and accepting/denying requests, users can enter either the **Document Number** or the **Request Number**. Either way, all requests pertaining to that Document Number will appear, and can be retired one-by-one. (Note that the only difference is the value entered in the field – either way any assets relating to a single request – i.e. assets tied to a Document Number – will appear).

Establish Approvers

1

Request Information

Request Number	45146	Date	06/13/2007
Barcode #	CD0000690360	Event Type	SCRAPPED - NOT SOLD
PMO	SURI ZUBAIR ZSURI	Fair Market Value	0
Detailed Circumstance and Justification:	OBSOLETE, NON-REPAIRABLE OR USABLE LAPTOP COMPUTERS AND PALM COMPUTERS		
Serial Number	SSG91300308	User Fields:	Notes:

2

Approvers Information

Assign Approvers

No. of Approvers:

Email Message:

3

Accept	Deny	Notify	Remove	Last Name	First Name	Middle Name	ID	Comment
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HENSLEY	SHEILA	K	5106	

Request Status: OPEN

Area 1 Information relating to the individual retirement **Request Number** shows here.

Area 2 At this point the PMO can either add approvers or deny the request. If they are going to approve the request, they first enter the number of approvers (including themselves). Who and how many approvers are assigned depends upon the Bureau as well as the situation. Remember, if the Property Review Board and Executive Property Review Board members are users of Sunflower, they may also review and approve or deny requests electronically rather than via a hard-copy document review and signature.

Area 3 A row appears for the total number of approvers entered in the **No. of Approvers** field. The PMO now selects the Last Name, First Name from the pull-down list to select the approvers for this request. Once approvers have been established, the PMO clicks the Save button which generates an email notification to the approvers – the PMO can add text to the email message prior to saving. Remember, all approvers may also run the report **Assets with Final Event Requests** if they wish. Additionally, the PMO may select the **Notify** checkbox which also sends email notification to the approver requesting they review the retirement request.

Note: Any person listed as an approver can be removed from the list by the PMO if deemed necessary.



NAV: Establish Approvers

Establish Approvers

Inventory Clerk / Inventory Manager

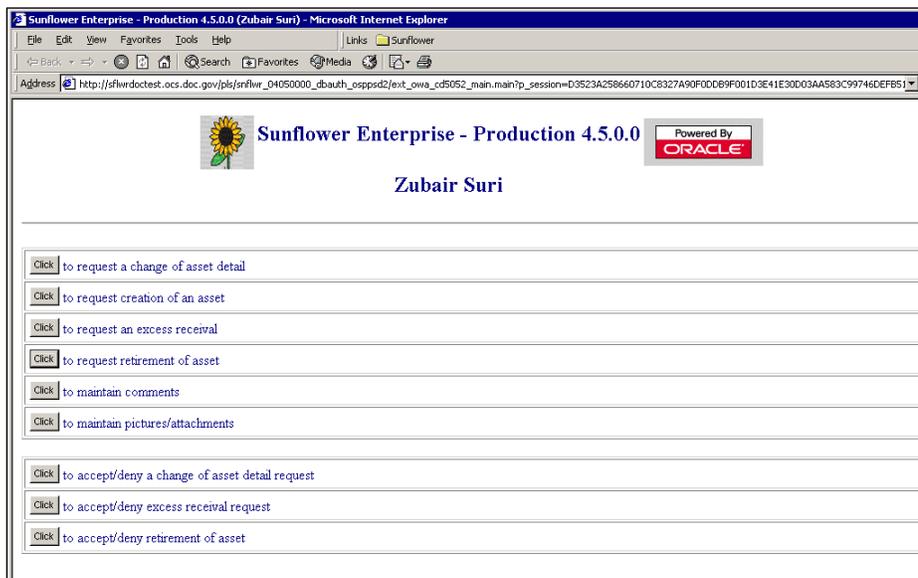
Sunflower Main Menu > CD 50 / 52 Transaction Menu

CD 50 / 52 Transaction Menu



1. Select the **CD 50/52 Transaction Menu**.

Result: The CD 50/52 Transaction Menu screen displays.



2. Select **Click to accept/deny retirement of assets (CD-52)**.

Establish Approvers

Sunflower Systems © 2009, All Rights Reserved
SF 4.5

Result: The **Accept/Reject CD-52 requests** screen displays.



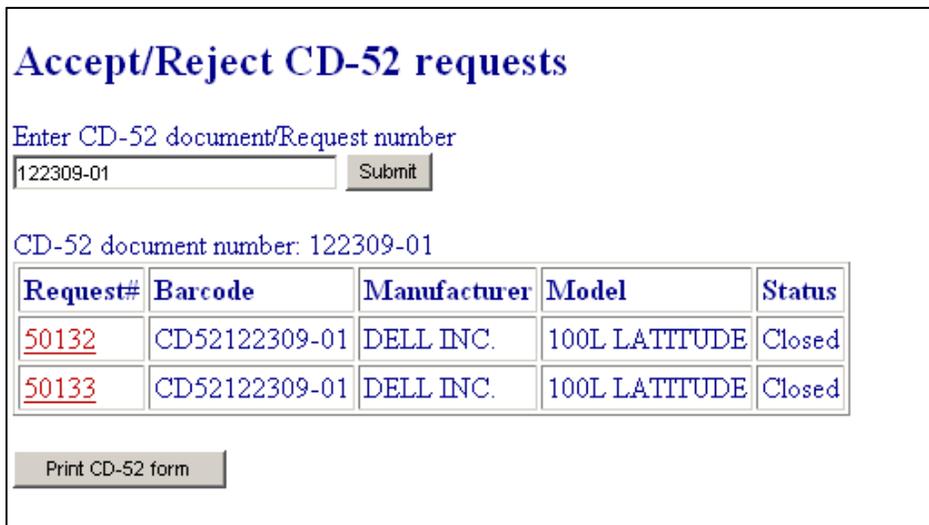
Accept/Reject CD-52 requests

Enter CD-52 document/Request number

3. Enter either a specific **Request Number**, or enter the **Document Number** and hit **Submit**.

Results: All requests pertaining to that Document Number will appear – whether you entered the Document Number or Request Number - and can be retired one-by-one.

If **Document Number** entered you will see this:



Accept/Reject CD-52 requests

Enter CD-52 document/Request number

CD-52 document number: 122309-01

Request#	Barcode	Manufacturer	Model	Status
50132	CD52122309-01	DELL INC.	100L LATTUDE	Closed
50133	CD52122309-01	DELL INC.	100L LATTUDE	Closed

If **Request Number** entered you will see this:

Accept/Reject CD-52 requests

Enter CD-52 document/Request number

50132

CD-52 document number: 122309-01

Request#	Barcode	Manufacturer	Model	Status
50132	CD52122309-01	DELL INC.	100L LATTUDE	Closed
50133	CD52122309-01	DELL INC.	100L LATTUDE	Closed

4. Click on the specific **Request#**.

Result: The fields related to the Request Number will display.

https://sflwrdoctest.ocs.doc.gov - Accept Retirement of Asset - Microsoft Internet Explorer

Request Information

Request Number	50132	Date	12/23/2009
Barcode #	CD52122309-01	Event Type	ABANDONED
PMO	JESSUP JENNIFER L CPPJLJ	Fair Market Value	
Detailed Circumstance and Justification:			
Serial Number		User Fields:	

Approvers Information

No. of Approvers:

Email Message:

Accept	Deny	Notify	Remove	Last Name	First Name	Middle Name	ID	Comment
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	JESSUP	JENNIFER	L	CPPJLJ	

Request Status: **OVERRIDDEN**

Establish Approvers

Sunflower Systems © 2009, All Rights Reserved
SF 4.5

5. Enter the total number of approvers (including you) in the **No. of Approvers** field and **Tab**.
6. Select the **List** button next to last name for the first blank row to assign approvers.
7. Add any additional text to include in the **Email Message** field, if desired.
8. Select the **Save** button when finished adding approver.

Note: Once the approvers are saved, an email is sent to the approvers selected, and the screen displays an OK message next to all the approvers that were added.

Request Information

Request Number	#5146	Date	06/13/2007
Barcode #	CD0000690360	Event Type	SCRAPPED - NOT SOLD
PMO	SURI ZUBAIR ZSURI	Fair Market Value	0
Detailed Circumstance and Justification:	OBSOLETE, NON-REPAIRABLE OR USABLE LAPTOP COMPUTERS AND PALM COMPUTERS		
Serial Number	SSG91300308	User Fields:	Notes:

Approvers Information

Assign Approvers

No. of Approvers: 2

Email Message: CD50 final event request has been created

Result	Accept	Deny	Notify	Remove	Last Name	First Name	Middle Name	ID	Comment
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HENSLEY	SHEILA			
Ok	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SURI	ZUBAIR			

Request Status: OPEN

Save

9. Repeat steps 6-8 until all the approvers have been added.

End of activity.



LAB: Establish Approvers

Approve Request and Retire Inventory Asset

1

Request Information			
Request Number	65146	Date	06/13/2007
Barcode #	CD0000690360	Event Type	SCRAPPED - NOT SOLD
PMO	SURI ZUBAIR ZSURI	Fair Market Value	0
Detailed Circumstance and Justification:	OBSOLETE, NON-REPAIRABLE OR USABLE LAPTOP COMPUTERS AND PALM COMPUTERS		
Serial Number	SSG91300308	User Fields:	Notes:

2

Assign Approvers

No. of Approvers:

Email Message:

Result	Accept	Deny	Notify	Remove	Last Name	First Name	Middle Name	ID	Comment
OK	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HENSLEY	SHEILA			

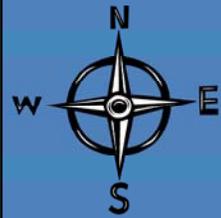
Request Status: OPEN

Save

Area 1 Once a Request Number is entered or selected, the details about the asset appear. All the justification information entered by the PC also appears here.

Area 2 The approver may select **Accept** or **Deny** from the checkboxes next to his/her name. Once a checkbox is selected and the action is saved a **Result** will appear next to the approver's name. (A PMO is the only one who may select the **Remove** checkbox to remove a name from the approver list.)

If multiple approvers are listed, they may approve in any order. After all the approvers have approved, the PMO will be then approve the retirement request. If any approver denied the request, then the PMO should research the reason for the denial. Upon successfully saving the approval, the asset is retired from Sunflower.



NAV: Approve Request
and Retire Inventory Asset

Approve Request and Retire Inventory Asset

Inventory Clerk / Inventory Manager

Sunflower Main Menu > CD 50 / 52 Transaction Menu

CD 50 / 52 Transaction Menu

To enter, click one of the the links below.

- [Sunflower Enterprise Forms](#)
- [Sunflower Enterprise Reports](#)
- [Sunflower Enterprise HTML Transaction Pages](#)
- [Stock Asset Management](#)
- [Search Attachments and Comments](#)
- [CD 50 / 52 Transaction Menu](#)

1. Select the **CD 50/52 Transaction Menu**.

Result: The CD 50/52 Transaction Menu screen displays.

Sunflower Enterprise - Production 4.5.0.0 (Zubair Suri) - Microsoft Internet Explorer

File Edit View Favorites Tools Help Links Sunflower

Address http://sfwrdocstest.ocs.doc.gov/pls/frfwir_04050000_dbauth_ospspsd2/ext_owa_cd5052_main.main?ip_session=D3523A258660710C8327A90F0DD89F001D3E41E30D03AA583C99746DEFB51

 Sunflower Enterprise - Production 4.5.0.0 

Zubair Suri

Click to request a change of asset detail

Click to request creation of an asset

Click to request an excess receival

Click to request retirement of asset

Click to maintain comments

Click to maintain pictures/attachments

Click to accept/deny a change of asset detail request

Click to accept/deny excess receival request

Click to accept/deny retirement of asset

2. Select **Click to accept/deny retirement of assets (CD-52)**.

Result: The Request Information screen displays.

Accept/Reject CD-52 requests

Enter CD-52 document/Request number

3. Enter either a specific **Request Number**, or enter the **Document Number** and hit **Submit**.

Note: All requests pertaining to that Document Number will appear, and can be retired one-by-one.

If **Document Number** entered you will see this:

Accept/Reject CD-52 requests

Enter CD-52 document/Request number

CD-52 document number: 122309-01

Request#	Barcode	Manufacturer	Model	Status
50132	CD52122309-01	DELL INC.	100L LATTITUDE	Closed
50133	CD52122309-01	DELL INC.	100L LATTITUDE	Closed

If **Request Number** entered you will see this:

Accept/Reject CD-52 requests

Enter CD-52 document/Request number

50132

CD-52 document number: 122309-01

Request#	Barcode	Manufacturer	Model	Status
50132	CD52122309-01	DELL INC.	100L LATTUDE	Closed
50133	CD52122309-01	DELL INC.	100L LATTUDE	Closed

4. Click on the specific **Request#**.

Result: The fields related to the Request Number will display.

https://sflwdoctest.ocs.doc.gov - Accept Retirement of Asset - Microsoft Internet Explorer

Request Information

Request Number	50132	Date	12/23/2009
Barcode #	CD52122309-01	Event Type	ABANDONED
PMO	JESSUP JENNIFER L CPPJLJ	Fair Market Value	
Detailed Circumstance and Justification:			
Serial Number		User Fields:	

Approvers Information

No. of Approvers:

Email Message:

Accept	Deny	Notify	Remove	Last Name	First Name	Middle Name	ID	Comment
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	JESSUP	JENNIFER	L	CPPJLJ	

Request Status: **OVERRIDDEN**

5. Select the **Accept** checkbox next to your name.

Note: Alternatively, users may also deny requests, or notify or remove themselves from the approval process.

6. Select the **Save** button to accept the retirement request.

Note: The Retirement Request is processed and the asset is retired. A Result message appears next to the approver's name.

Request Information

Request Number	#5146	Date	06/13/2007
Barcode #	CD0000690360	Event Type	SCRAPPED - NOT SOLD
PMO	SURI ZUBAIR ZSURI	Fair Market Value	0
Detailed Circumstance and Justification:	OBSOLETE, NON-REPAIRABLE OR USABLE LAPTOP COMPUTERS AND PALM COMPUTERS		
Serial Number	SSG91300308	User Fields:	Notes:

Approvers Information

Assign Approvers

No. of Approvers:

Email Message:

Result	Accept	Deny	Notify	Remove	Last Name	First Name	Middle Name	ID	Comment
Ok	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	HENSLEY	SHEILA			

Request Status: OPEN

Save

7. Repeat step 4 until all the Requests have been retired.

End of activity.



LAB: Approve Requests
and Retire Inventory Asset

Lesson Summary

- You should now be able to:
 - Summarize the steps used to retire assets
 - Complete the CD 50 / 52 Retirement Request Form
 - Run a report to determine which assets have open retirement requests
 - Establish an approver path for retiring assets
 - Approve and Retire assets

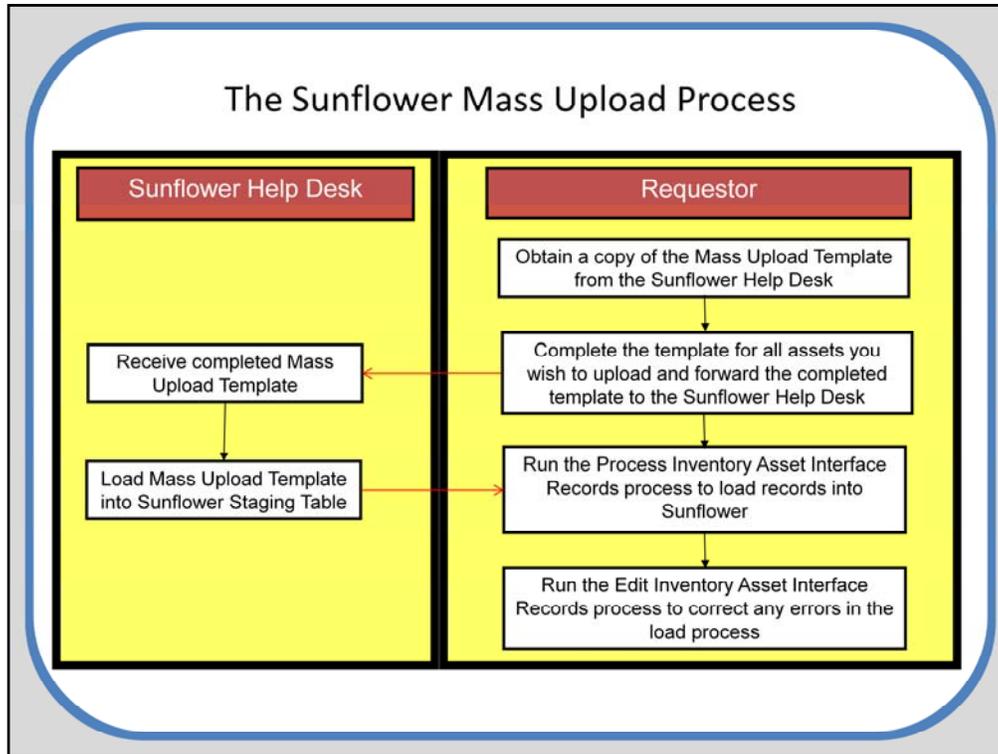


Chapter 12: Mass Uploads

Sunflower Assets 4.5

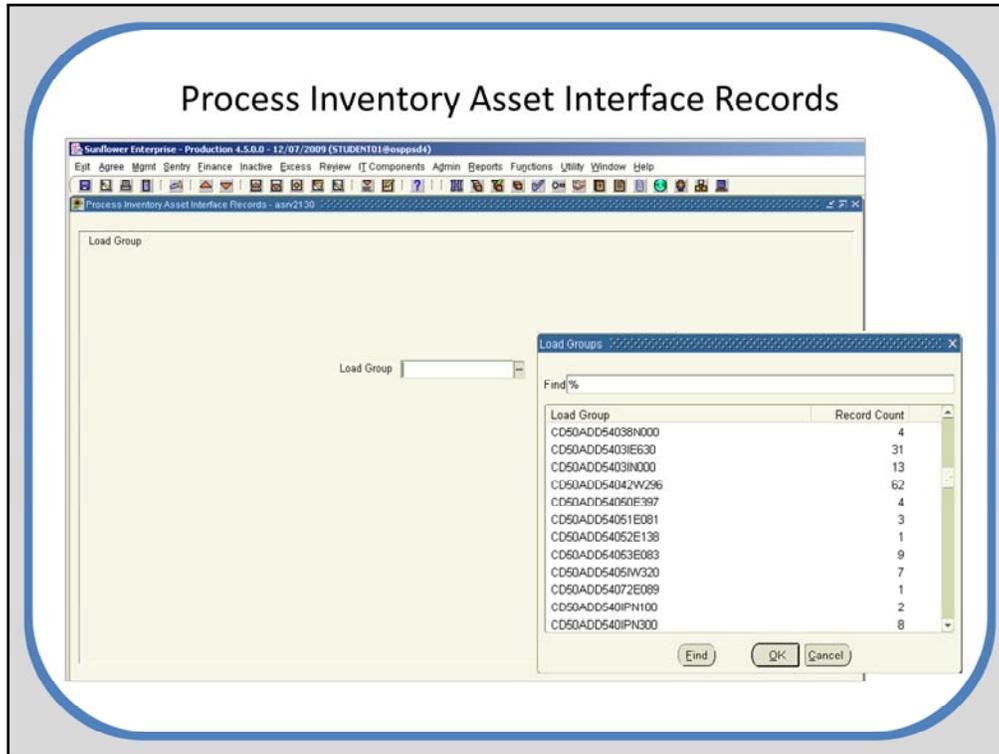
Lesson Objectives

- After this lesson you should be able to:
 - Understand the process for performing mass uploads
 - Process Inventory Asset Interface Records
 - Correct errors using the Edit Inventory Asset Interface Records form



- The mass upload process enables users to upload a group of assets into Sunflower at one time. This process should be used when a large number of assets needs to be added to the system.
- The standard Mass Upload Template must be used to complete a mass upload. This template must be filled out completely in order to process the mass upload. If information is missing or invalid, the records will error out and will not be uploaded into Sunflower.
- If reference data values or catalog entries do not exist in Sunflower, the user must request these values be added to Sunflower prior to processing the mass upload.
- When saving the template, please be sure you assign a unique name, such as your initials and the date you are submitting the template to the help desk.
- Upon receiving the template, the Sunflower Help Desk will load the spreadsheet into the Sunflower staging table for processing.
- The user will then need to process the mass upload and correct any errors that occur when the assets are loaded into Sunflower.

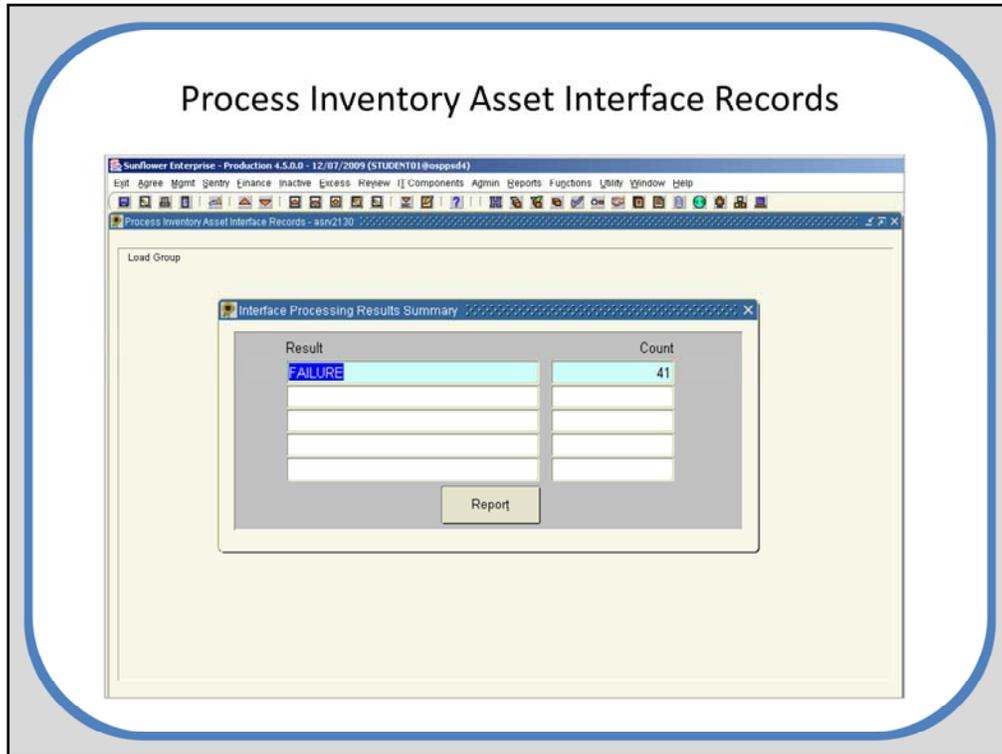
Process Inventory Asset Interface Records



You will use the **Process Inventory Asset Interface Records** form to import mass uploads into Sunflower.

1. Click on the Load Group List of Values
2. Select the Load Group you want to process and then select the **OK** button (this should be the file name you gave the template when you saved it).
2. Select the **Save** button on the toolbar to process your load group.

Process Inventory Asset Interface Records



Once the process runs, you will receive a Process Results Summary message, which will indicate the number of records successfully processed and whether there are any failures.

Failures can result from:

- Reference data values on the spreadsheet are not valid values in Sunflower
- A duplicate serial number already exists for the asset

Select the **Report** button to see a more detailed description of the error records.

Edit Inventory Asset Interface Records

Screenshot of the Sunflower Enterprise software interface for editing inventory asset records. The window title is "Sunflower Enterprise - Production 4.5.0.0 - 12/07/2009 (STUDENT01@spssd4)". The main form is titled "Edit Inventory Asset Interface Records - asmi0040". It shows a "Load Group" of "TAVAS01" and a "Record Group" of "CD888414". A message at the top states: "AS-01042: CNRC69FPFZ is a duplicate serial number for mfr/model HEWLETT-PACKARD DEVELOPMENT COMPANY, L.P. (A ASFRJFT 1Y01 Identifier C0000088414 Site 221600071 SSM 1 RUII DING NEW ORI FANS 1 A SSM 2 ROOM JIC SSM 3)". Below this is a "Go To Error" button. The form is divided into several sections: "Action" (New Asset), "Interest Entity", "Inventory Asset Id", "Barcode #", "Unique Name", "Asset Identifier Type", "Manager", "Owner", "Steward", "Catalog", "Manufacturer", "Model Number", "Description", "Asset Type", "Serial Number", "Flags", "Acquisition Date", "Release Datetime", "FSG Code", "Fed. Supply Group", "Drawing No.", "Responsibility Date", "Effective Date", and "Expected Return Date". The "Serial Number" field contains "CNRC69FPFZ" and the "Acquisition Date" is "12/14/2006".

You will use the **Edit Inventory Asset Interface Records** form to identify and correct errors encountered during the spreadsheet load process.

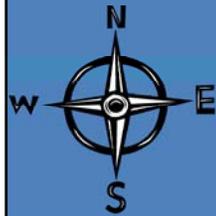
To search for errors:

1. Click on the **Find** button on the toolbar.
2. Enter the name of your Load Group in the Load Group field.
3. Click on the **Find** button again.

All errors for the load group will be displayed. Use the **Next Record/Previous Record** buttons or the arrow up/down keys to scroll through the records.

The error message at the top of the form indicates why the record did not process. Select the **Go To Error** button to place the cursor in the field that generated the error.

The record details will be displayed in the bottom block of the form.



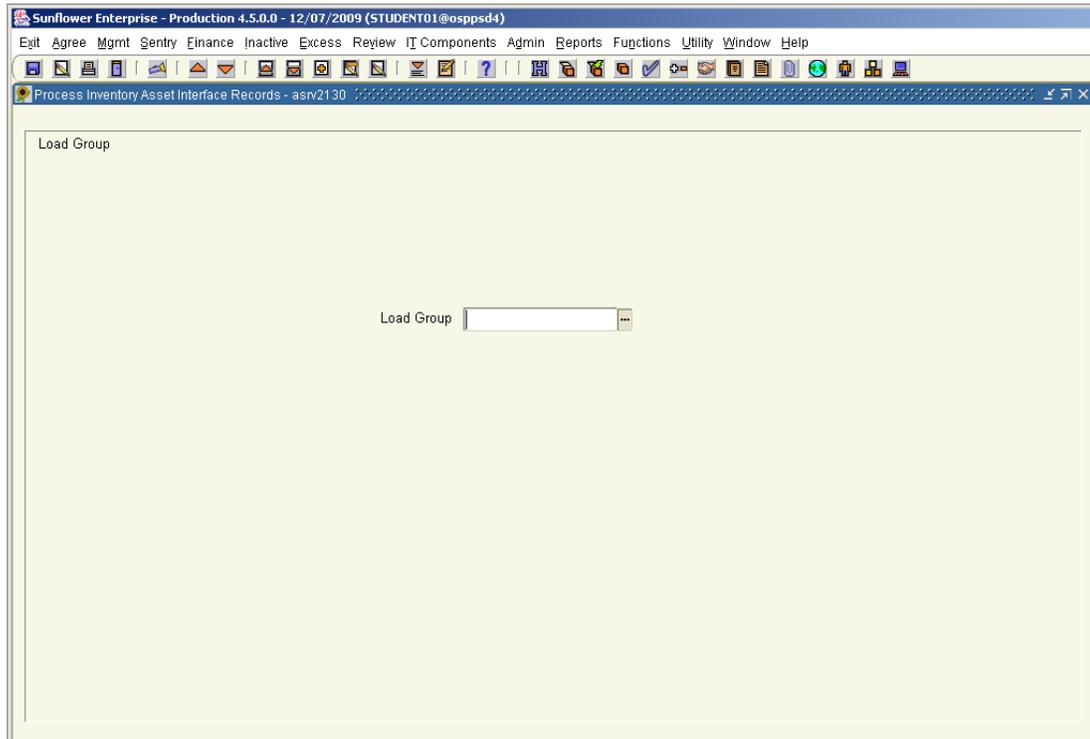
NAV: Process Inventory Asset Interface Records

Process Inventory Asset Interface Records

Inventory Manager

M > Manage > Process Inventory Asset Interface Records

Process Inventory Asset Interface Records

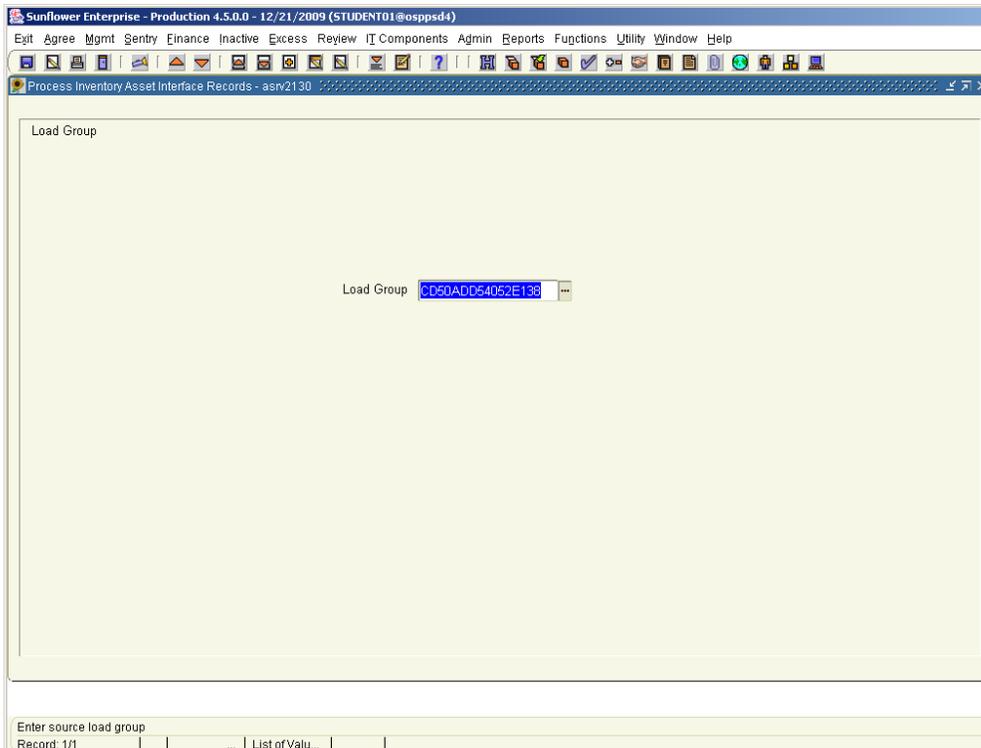


1. Click on the List of Values (LOV) for the Load Group field.

Result: The list of Load Groups will display.

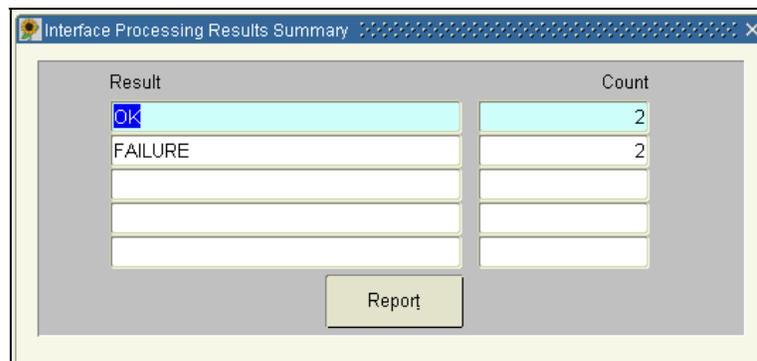
2. Select the name of the spreadsheet you submitted to the Sunflower Help Desk from the List of Values and then select the **OK** button.

Result: The Load Group will appear in the Load Group field:



3. Select the **Save** button on the toolbar to process the load group.

Result: The **Interface Processing Results Summary** message displays:



4. To see a detailed listing of errors, select the **Report** button.
5. If any errors are encountered, follow the steps in the **Edit Inventory Asset Interface Records** Navigation Instruction.
6. Click on the **Close box (X)** of the Interface Processing Results Summary message.

End of activity.



NAV: Edit Inventory Asset Interface Records

Edit Inventory Asset Interface Records

Purpose

The purpose of this document is to describe how to correct error records occurring during the mass upload process.

Inventory Clerk, Inventory Manager
M > Mgmt > Edit Inventory Asset Interface Records
Edit Inventory Asset Interface Records

The screenshot shows the Sunflower Enterprise software interface. The title bar reads "Sunflower Enterprise - Production 4.5.0.0 - 09/09/2007 (ZSURI@osppsd3)". The menu bar includes "Exit", "Agree", "Contract", "Mgmt", "Sentry", "Finance", "Inactive", "Excess", "Review", "IT Components", "Admin", "Reports", "Functions", "Utility", "Window", and "Help". The toolbar contains various icons for navigation and actions. The main window title is "Edit Inventory Asset Interface Records - asmn0040". Below the title bar, there are input fields for "Load Group", "Record Group", and "Processed", along with a "Go To Error" button and a "Ignore Indicators" checkbox. The form is organized into several sections with tabs: "Asset", "Asset (Cont.)", "Location", "Initial Event", "Final Event", "Value Components", "Global User Fields", "User Fields", "Document", "Commodity", and "Indicators". The "Asset" section contains the following fields: "Action", "Interest Entity", "Inventory Asset Id", "Barcode #", "Unique Name", "Asset Identifier Type", "Barcode Type", "Manager", "Code", "Bureau or Region", "Owner", "Code", "Accountability Office", "Steward", "al Area Code", "Cust Area", "Catalog", "Identifier*", "Manufacturer", "Code", "Name", "Model Number", "Model Name", "Description", "Asset Type", "FSG Code", "Fed. Supply Group", "Serial Number", "Drawing No.", "Flags: 1 2 3 4 5 6 7 8 9 10", "Acquisition Date", "Responsibility Date", "Effective Date", "Release Datetime", "Accept Datetime", and "Expected Return Date".

1. Place your cursor in the **Load Group** field.
2. Select the **Find** button from the toolbar.
3. Enter the **Load Group** you processed during the Process Inventory Asset Interface Records step.
4. Select the **Find** button from the toolbar to pull up your Load Group.

Result: The first Load Group error record is displayed.

5. Select the **Go To Error** button to search through the errors.

Result: The cursor is placed in the field with the error.

6. Update any information as needed.
7. Select the **Tabs** across the top of the screen to access additional property details to update.
8. Select the **Save** button from the toolbar.

Result 1: The message on the status bar will indicate that the record was successfully saved.

Result 2: The record is removed from the interface table, and the property record will be updated with the new information.

9. Continue to scroll through the records, repeating steps 5-8, until there are no more errors.

End of activity.

Lesson Summary

- You should now be able to:
 - Understand the process for performing mass uploads
 - Process Inventory Asset Interface Records
 - Correct errors using the Edit Inventory Asset Interface Records form



Chapter 13: Review & Sunflower Help

Sunflower Assets 4.5

Lesson Objectives

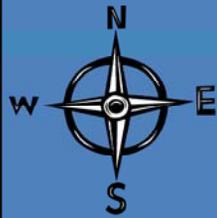
- After this lesson you should be able to:
 - Set Email Notifications
 - Describe help available to users
 - Identify forms to complete for help

Email Notifications

- Open Asset Requests
- Closed Asset Requests
- Ongoing Assets Events

Email notifications will be established for Sunflower Users. Sunflower allows for the Custodial Area (PC), Property Contact and User to be notified when events happen. For Open and Closed Asset Requests notifications can be established for current and requested PC, Property Contact and User. For Ongoing Events notifications can be sent prior to the event and after the event.

Sunflower will be configured initially, but users may change their settings if they desire using the HTML Transaction Pages.



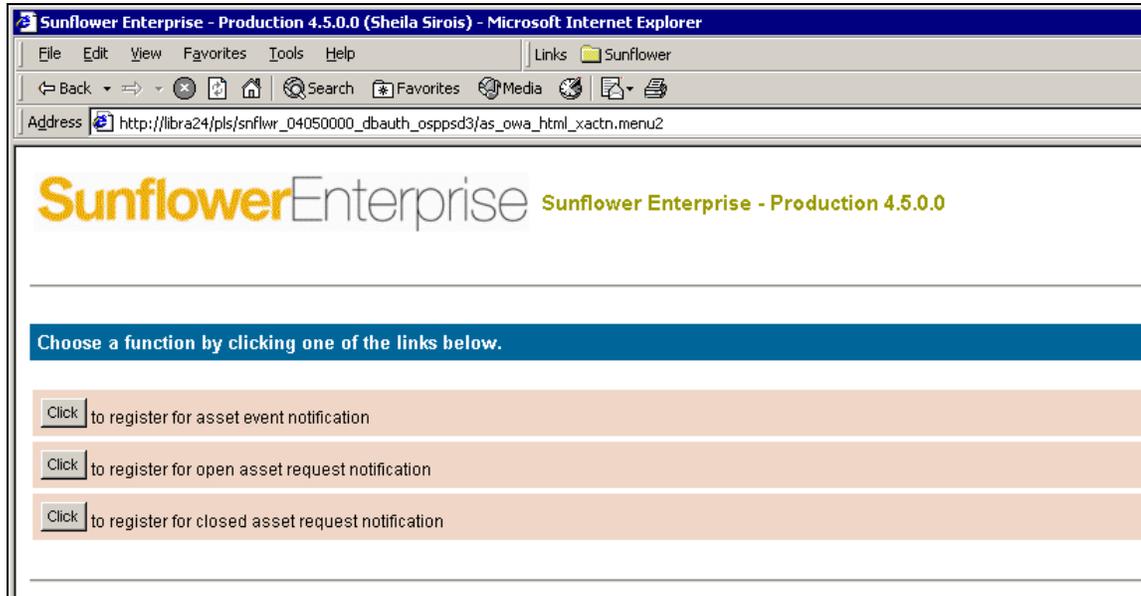
NAV: Select Asset Event
Email Notifications

Select Asset Event Email Notifications

Inventory Clerk

Sunflower Enterprise HTML Transaction Page > Click to Register for an e-mail notification

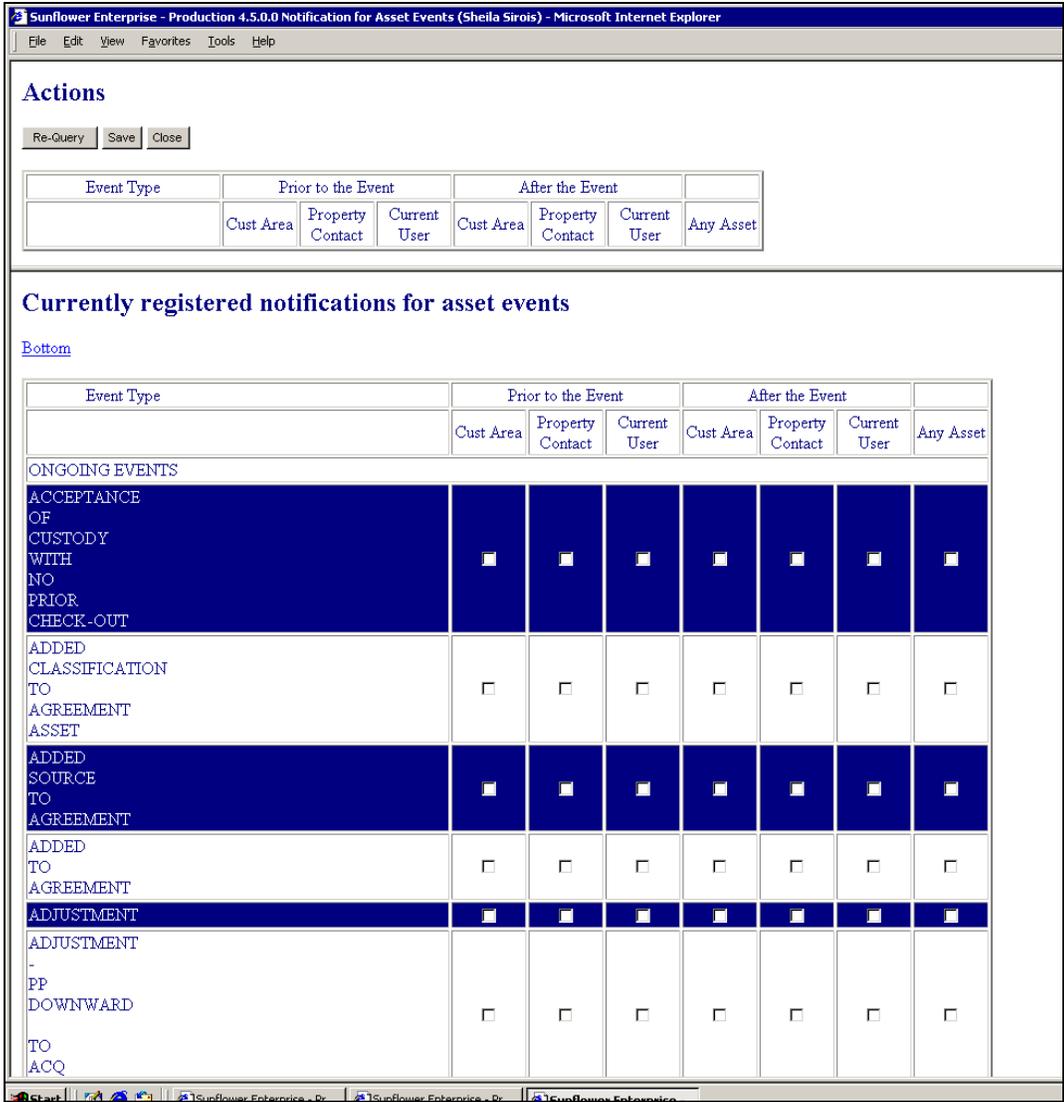
Click to Register for an e-mail notification



1. Select **click to register for asset event notification** button.

Note: This sets email notifications regarding ongoing events.

Result: The Currently registered notifications for asset events appears.



2. Select the **checkbox** for the type of event for which you wish to receive email notification.

Field	Description
Prior to the Event	Receive email notification where you are listed as the Custodial Area, Property Contact or User prior to the action taken on the asset.
After the event	Receive email notification where you are listed as the Custodial Area, Property Contact or User after the action taken on the asset.
Custodial Area	Receive email notification for assets within your custodial area.
Property Contact	Receive email notification for assets that list you as the Property Contact.

User	Receive email notification for assets that list you as the current user.
Any Asset	Never select this column. If selected you will receive email notification for action being taken on any asset in the DOC regardless of Bureau or Custodial Area.

3. Select the **Save** button to save your selection.

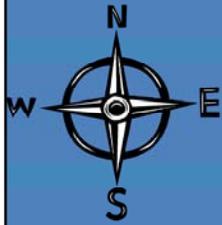
Result: Your asset event email notification selections have been saved and a message appears at the top of the screen.

The screenshot shows the Sunflower Enterprise web application interface. At the top, there is a navigation bar with 'File', 'Edit', 'View', 'Favorites', 'Tools', and 'Help'. Below this is the 'Actions' section, which includes a 'Re-Query' button and 'Save' and 'Close' buttons. A table allows users to select notification preferences for various event types, categorized into 'Prior to the Event' and 'After the Event'. The 'Any Asset' column is highlighted in grey.

Below the 'Actions' section, a message states: "The notification table for asset events has been successfully updated". A link labeled "Bottom" is provided. Below the message is a table showing the updated notification settings for various asset events.

Event Type	Prior to the Event			After the Event			Any Asset
	Cust Area	Property Contact	Current User	Cust Area	Property Contact	Current User	
ONGOING EVENTS							
ACCEPTANCE OF CUSTODY WITH NO PRIOR CHECK-OUT	<input checked="" type="checkbox"/>						
ADDED CLASSIFICATION TO AGREEMENT ASSET	<input type="checkbox"/>						
ADDED SOURCE TO AGREEMENT	<input checked="" type="checkbox"/>						
ADDED TO AGREEMENT	<input type="checkbox"/>						
ADJUSTMENT - PP DOWNWARD TO ACQ	<input type="checkbox"/>						

End of activity.



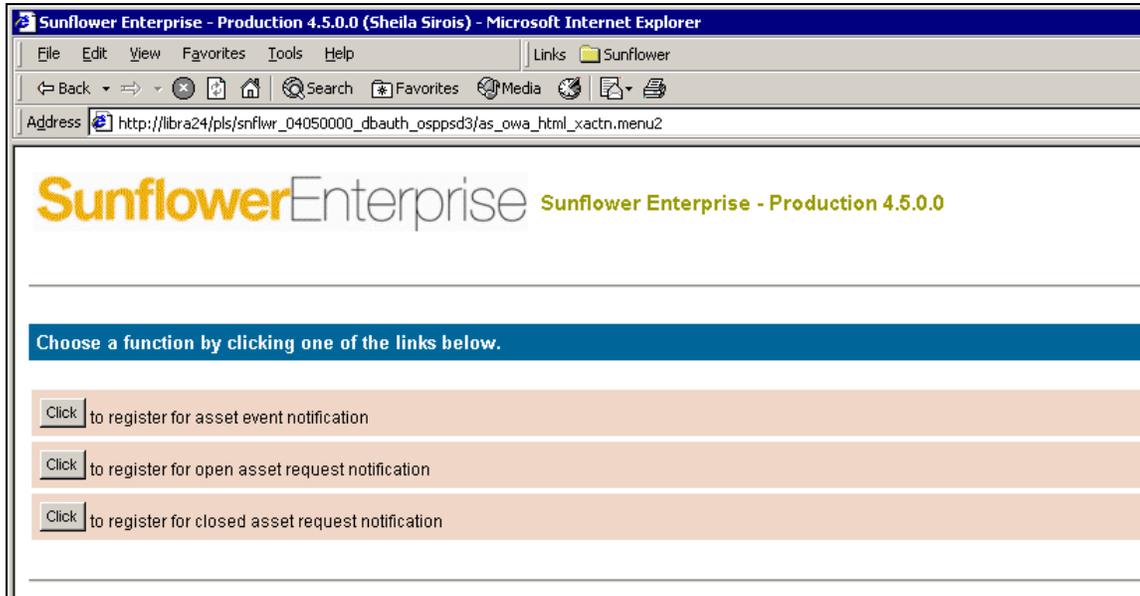
NAV: Select Open Asset
Request Email Notifications

Select Open Asset Request Email Notifications

Inventory Clerk

Sunflower Enterprise HTML Transaction Page > Click to Register for an e-mail notification

Click to Register for an e-mail notification



1. Select the **click to register for open asset request notification** button.

Note: This sets email notifications when a request has been made to update or change information relating to an asset.

Result: The Currently registered notifications for open asset requests appears.

Sunflower Enterprise - Production 4.5.0.0 Notification for Open Asset Requests (Sheila Sirois) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Actions

Re-Query Save Close

Request Type	Current			Requested			
	Cust Area	Property Contact	Current User	Cust Area	Property Contact	Current User	Any Asset

Currently registered notifications for open asset requests

[Bottom](#)

Request Type	Current			Requested			
	Cust Area	Property Contact	Current User	Cust Area	Property Contact	Current User	Any Asset
CHANGE ASSET DETAIL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
CHANGE CUSTODIAN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
CHANGE LOCATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
CHANGE STEWARD	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
CHANGE USER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
EXCESS RECEIVAL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
FINAL EVENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
INACTIVE RECEIVAL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
INACTIVE REDEPLOY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
INVENTORY ASSET ACCEPT				<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>

[Top](#)

2. Select the **checkbox** for the type of event for which you wish to receive email notification.

Field	Description
Current	Receive email notification where you are listed as the <i>current</i> Custodial Area, Property Contact or User.
Requested	Receive email notification where you are listed as the <i>requested</i> Custodial Area, Property Contact or User.
Custodial Area	Receive email notification for assets within your custodial area.
Property Contact	Receive email notification for assets that list you as the Property Contact.

User	Receive email notification for assets that list you as the current user.
Any Asset	Never select this column. If selected you will receive email notification for action being taken on any asset in the DOC regardless of Bureau or Custodial Area.

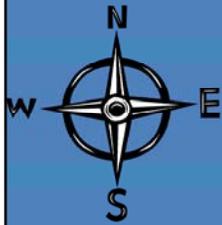
3. Select the **Save** button to save your selection.

Result: Your open asset requests email notification selections have been saved and a message appears at the top of the screen.

The screenshot shows a web browser window titled "Sunflower Enterprise - Production 4.5.0.0 Notification for Open Asset Requests (Sheila Sirois) - Microsoft Internet Explorer". The page displays an "Actions" section with "Re-Query", "Save", and "Close" buttons. Below this is a table with columns for "RequestType", "Current" (Cust Area, Property Contact, Current User), "Requested" (Cust Area, Property Contact, Current User), and "Any Asset". A message states: "The notification table for open asset requests has been successfully updated". Below the message is a table with the same columns as above, containing various request types and their corresponding notification checkboxes. The "CHANGE CUSTODIAN" row has a checked checkbox in the "Property Contact" column under "Current".

RequestType	Current			Requested			Any Asset
	Cust Area	Property Contact	Current User	Cust Area	Property Contact	Current User	
CHANGE ASSET DETAIL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
CHANGE CUSTODIAN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
CHANGE LOCATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
CHANGE STEWARD	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>
CHANGE USER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
EXCESS RECEIVAL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
FINAL EVENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
INACTIVE RECEIVAL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>
INACTIVE REDEPLOY	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
INVENTORY ASSET ACCEPT				<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>

End of activity.



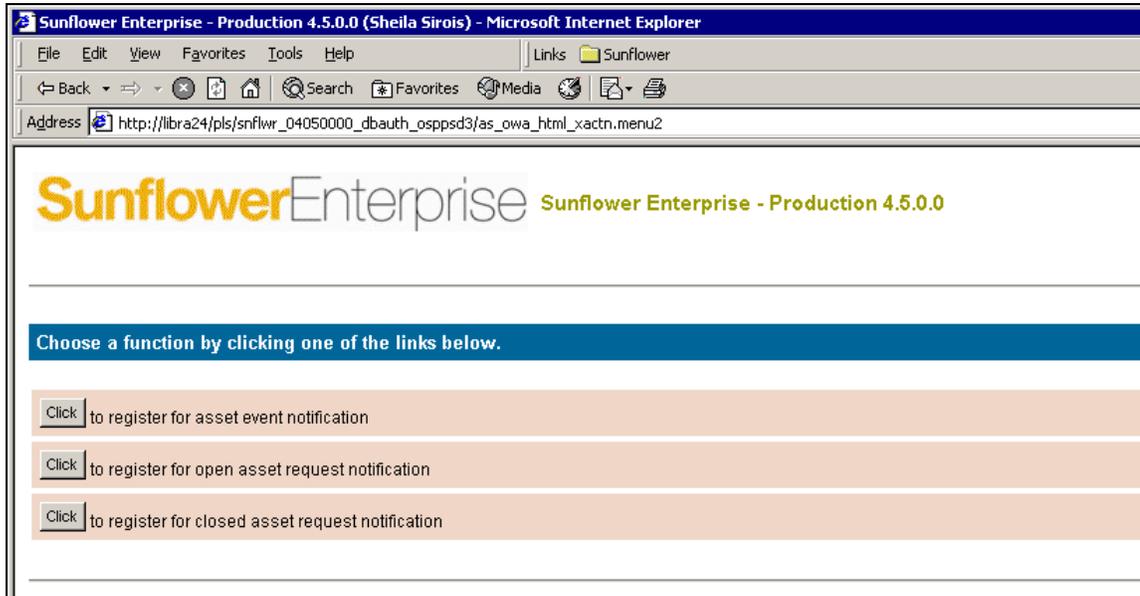
NAV: Select Closed Asset
Request Email Notifications

Select Closed Asset Request Email Notifications

Inventory Clerk

Sunflower Enterprise HTML Transaction Page > Click to Register for an e-mail notification

Click to Register for an e-mail notification



1. Select **click to register for closed asset request notification** button.

Note: This sets email notifications when a request to update or change information has been accepted, denied or withdrawn.

Result: The Currently registered notifications for closed asset requests appears.

Sunflower Enterprise - Production 4.5.0.0 Notification for Closed Asset Requests (Sheila Sirois - Microsoft Internet Explorer)

File Edit View Favorites Tools Help

Actions

Re-Query Save Close

Request Type	Current			Requested			
	Cust Area	Property Contact	Current User	Cust Area	Property Contact	Current User	Any Asset

Currently registered notifications for closed asset requests

[Bottom](#)

Request Type	Current			Requested			
	Cust Area	Property Contact	Current User	Cust Area	Property Contact	Current User	Any Asset
CHANGE ASSET DETAIL							
DENIED	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
EXPIRED	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
OVERRIDDEN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
WITHDRAWN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
CHANGE CUSTODIAN							
DENIED	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>
EXPIRED	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>
OVERRIDDEN	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>
WITHDRAWN	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>		<input type="checkbox"/>
CHANGE LOCATION							
DENIED	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
EXPIRED	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
OVERRIDDEN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
WITHDRAWN	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				<input type="checkbox"/>
CHANGE STEWARD							
DENIED	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
EXPIRED	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
OVERRIDDEN	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
WITHDRAWN	<input type="checkbox"/>			<input type="checkbox"/>			<input type="checkbox"/>
CHANGE USER							
DENIED	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>

2. Select the **checkbox** for the type of event for which you wish to receive email notification.

Field	Description
Current	Receive email notification where you are listed as the <i>current</i> Custodial Area, Property Contact or User.

Requested	Receive email notification where you are listed as the <i>requested</i> Custodial Area, Property Contact or User.
Custodial Area	Receive email notification for assets within your custodial area.
Property Contact	Receive email notification for assets that list you as the Property Contact.
User	Receive email notification for assets that list you as the current user.
Any Asset	Never select this column. If selected you will receive email notification for action being taken on any asset in the DOC regardless of Bureau or Custodial Area.

3. Select the **Save** button to save your selection.

Result: Your closed asset requests email notification selections have been saved and a message appears at the top of the screen.

The screenshot shows a web browser window titled "Sunflower Enterprise - Production 4.5.0.0 Notification for Closed Asset Requests (Sheila Sirois - Microsoft Internet Explorer)". The page has a menu bar (File, Edit, View, Favorites, Tools, Help) and a section titled "Actions" with buttons for "Re-Query", "Save", and "Close". Below this is a table with columns for "Request Type", "Current" (Cust Area, Property Contact, Current User), "Requested" (Cust Area, Property Contact, Current User), and "Any Asset".

A message states: "The notification table for closed asset requests has been successfully updated". Below the message is a link labeled "Bottom".

The main table below the message is a grid with the same column structure as the one above. It is divided into sections: "CHANGE ASSET DETAIL", "CHANGE CUSTODIAN", "CHANGE LOCATION", and "CHANGE STEWARD". Each section contains rows for "DENIED", "EXPIRED", "OVERRIDDEN", and "WITHDRAWN". Checkmarks are visible in the "Current Cust Area" and "Requested Cust Area" columns for the "DENIED" rows in the "CHANGE CUSTODIAN" section.

End of activity.

Helpful Resources



Help! Who can answer my questions???!!!!

Sunflower Help Desk

- The Sunflower Help Desk is available to assist with user questions.
- The Help Desk has a maximum 24 hour response time. Ask your question today, get assistance by the next day.

- Phone Number: 202-482-4110
- Email: sunflowerhelpdesk@doc.gov
- Website: www.osec.doc.gov/oas/ppmd

Types of Requests for the Help Desk

- General How-to questions
- Create People Records and User Requests
- Organization Requests
- Location Requests
- Other Requests

For general how-to questions, the help desk will be able to assist you. For requests to update information in the Sunflower System, users are required to complete a form with more detailed information.

All forms can be found on the PPMD website
<http://www.osec.doc.gov/oas/ppmd/ppmd/forms.htm>

People Records and User Requests

- Establish Person Record
- Establish a user
- Request User ID
- Establish or modify Organization contact

Person Record: Sunflower Help Desk will manually maintain the People table. The information in this table allows Sunflower users to be created and anyone listed in this table may be assigned as a user of an asset.

Users: The Sunflower Help Desk will create, modify or delete a user ID for individuals using the Sunflower System. This will establish the roles of a user and assign them to the correct organization. The different roles a user may be assigned include: Administrator, Inventory Clerk, and User.

User ID and Person Record Forms

- Sunflower PPMS Create Person Record & User ID Request Form
- Sunflower PPMS Modify/Retire Person Record Details Form
- Sunflower PPMS Organization Contact Request Form EST FORM

Users will need to complete forms to send to the Sunflower Help Desk when requiring assistance.

SUNFLOWER PPMS CREATE PERSON RECORD & USER ID REQUEST FORM – This form is used to add users and assign a user ID to them to allow access to the Sunflower System.

SUNFLOWER PPMS MODIFY/RETIRE PERSON RECORD DETAILS FORM – This form is used to add or remove employees to the Sunflower system. This allows the PC to assign an employee as a user of a piece of property.

SUNFLOWER PPMS ORGANIZATION CONTACT REQUEST FORM – This form is used to add, modify or remove an Organization Contact.

Organization Requests

- New Custodial Area
- Modify Custodial Area
- Retire Custodial Areas

Organizations within the DOC Sunflower instance have been defined to follow the DOC hierarchy. Beneath the department are 13 bureaus. Beneath each bureau is at least one property accountability office. Beneath each property accountability office are multiple custodial areas. Each of these divisions is given an organization value within Sunflower. Each custodial area is then assigned a PC. This establishes the area that a user can transact on property records.

New Custodial Area: Essential information includes the name of the new organization, the parent organization, and the organization contact.

Modify Custodial Area: Generally used when custodial areas are being merged into one or split into at least two areas.

Retire Custodial Area: When no longer using a custodial area, the helpdesk will end date it so the area may no longer be selected. The assets that were previously assigned to this area will maintain that information in its history records.

Organization Form

- Sunflower PPMS Maintain Organizations Form

Users will need to complete forms to send to the Sunflower Help Desk when requiring assistance.

The **SUNFLOWER PPMS MAINTAIN ORGANIZATIONS FORM** is used to add, modify or retire an organization from Sunflower. In other words when a new custodial area is created, merged with another or simply removed. The primary property custodian and any secondary custodians for the organization are also added, modified or retired using this form.

Location Requests

- Add new Sites and Buildings
- Modify Sites and Buildings
- Retire Sites and Buildings

Given the size of the department, it is likely there will be frequent changes to buildings and possibly sites. In order to maintain records that accurately reflect the state of the assets, it is important to update the list of values as quickly as possible when a location is changed.

Buildings and Sites Forms

- Sunflower PPMS Maintain Sites Form
- Sunflower PPMS Maintain Buildings Form

Users will need to complete forms to send to the Sunflower Help Desk when requiring assistance.

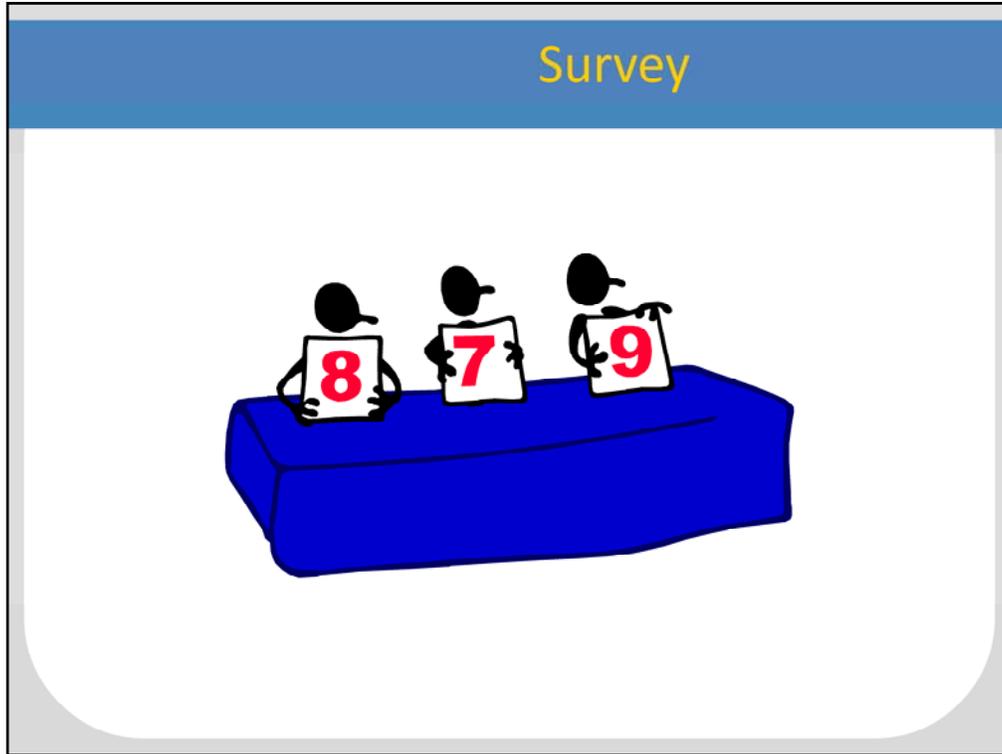
SUNFLOWER PPMS MAINTAIN SITES FORM – This form is used to add, modify or retire sites from Sunflower.

SUNFLOWER PPMS MAINTAIN BUILDINGS FORM – This form is used to add, modify or retire buildings from Sunflower.

Other Requests

- Catalog entries
- Manufacturers
- User Defined Fields

There are a number of other values that may require modification in Sunflower. Such fields may include User Defined Fields, manufacturers, and catalog entries, among others. Changes to these lists will most likely be very infrequent. However, these changes can impact all bureaus, and therefore will need universal acceptance.



- Your instructor will provide information about any surveys to be completed for the course.

Lesson Summary

You should now be able to:

- Set Email Notifications
- Describe help available to users
- Identify forms to complete for help

Appendix Table of Contents

- Sunflower Systems Icons and Hot Keys Job Aid
- Sunflower System - Asset Creation Job Aid

Sunflower System Icons and Hot Keys

Catalog	
Clear All	
Clear Record	
Comment/Picture/Attachment	
Display List	
Document	
Edit	
Exit	
Final Event	
Find	

Help	
Initial Event	
Insert Record	
IT Component Summary and History	
Journal Entry	
Location	
Next Block	
Next Record	
Ongoing Event	
Organization	

Person	
Previous Block	
Previous Record	
Print	
Remove Record	
Resolution	
Save	
Summary & History	

Function	Key
Clear Block	F7
Clear Field	F5
Clear Form	F8
Clear Record	F6
Commit/Save	Ctrl+S
Count Query	F12
Delete Record	Ctrl+Up
Display Error	Shift+Ctrl+E
Duplicate Field	Shift+F5
Duplicate Record	Shift+F6
Edit	Ctrl+E

Function	Key
Enter Query	F11
Execute Query	Ctrl+F11
Exit	F4
Help	Ctrl+H
Insert Record	Ctrl+Down
List of Values	Ctrl+L
List Tab Pages	F2
Next Block	Shift+PageDown
Next Field	Tab
Next Primary Key	Shift+F7
Next Record	Down

Function	Key
Next Set of Records	Shift+F8
Previous Block	Shift+PageUp
Previous Field	Shift+Tab
Previous Record	Up
Print	Ctrl+P
Page Down	Scroll Down
Page Up	Scroll Up
Return	Return
Show Keys	Ctrl+K
Update Record	Ctrl+U
“Copy” / “Paste”	Ctrl+C / Ctrl+V

Sunflower Systems - Asset Creation Job Aid

1. Enter **Barcode Number**
2. Select **Manufacturer**
3. Select **Model**
4. Enter **Serial Number** (if known)
5. Select **Initial Event**
6. Double click **User Fields**, complete and save
7. Double click **Asset Value**
8. Enter **Asset Value Amount**
9. Double click the **User Fields*** and complete as necessary
10. Select **Save**
11. Tab through or update **Acquisition Date**
12. Tab through or update **Responsibility Date**
13. Enter **Effective Date**
14. Enter **Bureau or Region**
15. Enter **Property Accountability Office**
16. Enter **Custodial Area**
17. Enter **Prop Custodian**
18. Select **Contact ID** Last Name, First
19. Select **User** Last Name, First
20. Double click **Location**
21. Select **Site**
22. Select **Building**
23. Select or Type **Room**
24. Select **Save** location
25. Select **Save** asset

The screenshots illustrate the following steps:

- Screenshot 1:** Step 1 (Barcode #), Step 2 (Manufacturer), Step 3 (Model), Step 4 (Serial Number), Step 5 (Initial Event), Step 6 (User Fields), Step 7 (Asset Value).
- Screenshot 2:** Step 8 (Asset Value Amount), Step 9 (User Fields*).
- Screenshot 3:** Step 10 (Save), Step 11 (Acquisition Date), Step 12 (Responsibility Date), Step 13 (Effective Date), Step 14 (Bureau or Region), Step 15 (Property Accountability Office), Step 16 (Custodial Area), Step 17 (Prop Custodian), Step 18 (Contact ID), Step 19 (User).
- Screenshot 4:** Step 20 (Location), Step 21 (Site), Step 22 (Building), Step 23 (Room), Step 24 (Save location), Step 25 (Save asset).

For more detailed instructions:

Refer to the NAV: Asset Creation

As of September 2007

