



SunflowerSystems

SunflowerEnterprise

Sunflower Assets 4.5

User Guide

Sunflower Systems

2420 Camino Ramon, Suite 130
San Ramon, California 94583
USA

www.sunflowersystems.com

COPYRIGHTS

Copyright (c) 2006 Annams Systems Corporation. All rights reserved.

This document is subject to change without notice. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any format, electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of Sunflower Systems. The software and program contents described in this document are proprietary to Annams Systems Corporation and are solely distributed to users of Sunflower Systems' products under a specified license agreement. This contains strict restrictions on use and disclosure and is protected by copyright law.

If the Program is used by a DOD Government Agency, then the Program shall be acquired with only those rights specifically licensed as provided in 48 C.F.R. [DFAR] 227.7202-1 through 227.7202-4 (June 1995). If the Program is used by a non-DOD Government Agency, then the Program shall be considered, delivered and used as Restricted Computer Software product as defined and governed by 48 C.F.R. [FAR] 52.227-19 (June 1987), titled Commercial Computer Software - Restricted Rights.

Printed in the USA 2006.

Rev 4.5.06.06

TRADEMARKS

Sunflower Assets®, Sunflower Contract Reports, Sunflower ExcessTrak, Sunflower MobileTrak, Sunflower PackTrak, SyncLink, Sunflower Sentry and the Sunflower logo are either trademarks or registered trademarks of Annams Systems Corporation.

THIRD-PARTY COPYRIGHTS & TRADEMARKS

Oracle is a registered trademark of Oracle Corporation.

Microsoft, Windows, Windows 2000, Windows XP, Windows Server, Active Directory, ActiveX, BizTalk Server, Outlook, Excel, Visual Basic, Visual Studio.NET, and Visual C++ are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Microsoft Business Solutions, Microsoft Business Network, Great Plains and Axtapa are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Other brands and their products are trademarks or registered trademarks of their respective holders and should be noted as such.

CONTENTS

- PREFACE** **XV**
 - About this Guide** **xvi**
 - Intended Audience xvi
 - Administrators xvi
 - Functional Users xvi
 - Document Conventions xvi
- 1 INVENTORY ASSETS** **1**
 - About Inventory Assets** **2**
 - Inventory Asset Management Workflow 3
 - Inventory Asset Roles** **4**
 - Management Menu Access 5
 - Create Inventory Assets** **6**
 - Single Asset Creation 8
 - Create Assets Using the Maintain Inventory Assets Screen 8
 - Maintain Inventory Assets Field Terms 10
 - Maintain Inventory Assets - Page 2 14
 - Create Assets Using the PO Interface Feature 15
 - Mass Asset Creation 16
 - Maintain Inventory Assets - Duplication 16
 - PO Interface - Duplication 18
 - Release and Accept New Assets 19
 - Maintain Inventory Assets** **21**
 - View Inventory Asset Details 22
 - Review The Asset Event History 24

Timeline Creator Information	26
Asset Summary and History Field Terms	27
Edit Inventory Asset Records	30
Change Inventory Asset Information	31
Edit Comments, Attachments and Pictures	32
Add Pictures	34
Add Attachments	37
Maintain Asset Structures (Parent/Child Relationships)	39
View Parent Child Assets with the Asset Structure Report	42
Asset Structure Report Output	44
Transfer Assets	45
Transfer Assets Directly (Change Location)	46
Change Location and Custodian	48
Create Request (Request New Steward)	49
Accept an Asset Request (Accept Requested Steward Change)	51
Inventory Assets with Requests Report	52
Inventory Assets with Requests Report Output	54
Close Inventory Asset Requests	55
Deny Requests	57
Withdraw Requests	58
Accept Request and make additional changes	60
Transfer Inventory Asset Value	61
Maintain Inventory Asset Ongoing Events	62
Maintain Inventory Asset User Fields	64
Inactivate Inventory Assets	66
Send an Asset to Storage	67
Inventory Asset Inactive Receival Request	68
Withdraw Inactive Receival Request	70
Denied Inventory Asset Inactive Receival Request	71
Inventory Assets with Recently Denied Requests Report Output	73
Re-deploy Inactive Assets	74
Request Inactive Asset Redeployment	74
Withdraw Inactive Redeployment Requests	76
Excess Inventory Assets	77
Request Inventory Asset Excess Receival	78
Withdraw Inventory Asset Excess Receival	80
Manage Denied Inventory Asset Excess Receival	81
Inventory Assets with Recently Denied Requests Report	83

Utilize Excess Assets	84
Use Asset Search	85
Asset Search Report Output	86
Excess Asset Report	87
Excess Assets Report Output	89
Create Excess Asset Reservations	90
Retire Inventory Assets	92
Create an Inventory Asset Final Event	93
Reverse Asset Final Events	95
Inventory Asset Final Events Report	97
Inventory Asset Final Events Report Output	99
Re-Activate Inventory Assets	100
Management Reports	101
Inventory Assets (Global Information) Report	103
Inventory Assets (Global Information) Report Output	104
Asset Search Report	105
Asset Search Report Output	107
Asset Structure Report	108
Inventory Asset Activity Summary by Asset Flag	109
Inventory Asset Activity Summary by Flag Report Output	110
Inventory Asset Activity Summary by Asset Type	111
Inventory Asset Activity Summary by Asset Type Report Output	112
Inventory Asset Final Events	113
Inventory Asset Final Events Report Output	115
Inventory Asset History	116
Inventory Asset History Report Output	117
Inventory Asset Initial Events	118
Inventory Asset Initial Events Report Output	120
Inventory Asset Interface Processing Results	121
Inventory Asset Interface Processing Results Report Output	122
Inventory Asset Ongoing Events	123
Inventory Asset Ongoing Events Report Output	125
Inventory Asset Summary by Asset Flag	126
Inventory Asset Summary by Flag Report Output	127
Inventory Asset Summary by Asset Type	128
Inventory Asset Summary by Asset Type Report Output	129
Inventory Asset Timeline	130

Inventory Asset Timeline Report Output	131
Inventory Asset Utilization.	132
Inventory Asset Utilization Report Output	134
Inventory Assets Pending Acceptance by Age	135
Inventory Assets Pending Acceptance by Age Report Output	136
Inventory Assets Pending Release by Age	137
Inventory Assets Pending Release by Age Report Output	138
Inventory Assets with Recently Denied Requests	139
Inventory Assets with Requests	140
Purchase Order Aging Report.	141
Purchase Order Aging Report Output	143
Excess Asset Report.	144
Excess Assets Report Output	144

2 FINANCE147

About Financial Assets	148
Finance Module Workflow.	149
Finance Roles	150
Finance Menu Access	151
Setup Financial Assets	152
Define a Carrier	153
Define the Financial Calendar.	155
Create Ledger Batches	158
Define Journal Entry Templates	160
Define Journal Entry Rules	164
Define Ledger Batch Assignments	166
Create Financial Assets	168
Maintain Financial Assets	168
Create Assets Using the PO Interface Feature	170
Mass Asset Creation	170
View Financial Asset Summary and History.	171
Manage Financial Assets	172
Capitalize Financial Assets (Part I).	173
Capitalize Financial Assets (Part II)	175
Record Uncapitalized Reason	177
Adjust Capitalized Value	178
Transfer Capital Value	180

De-Capitalize an Asset	182
Reverse De-Capitalization of an Asset	183
View Financial Transactions	185
Financial (Capital) Asset Reports	186

3 AGREEMENTS 189

About Agreements and Agreement Assets	190
Agreement Module Workflow	191
Agreement Roles	192
Agreement Menu Access	193
Agreement Manager vs. Agreement Clerk	194
Agreement Manager	194
Agreement Clerk	194
Agreement Setup	195
Create Agreement Types	195
Create Authorized Users	198
Assign Authorization to Manage Agreements by Type	198
Assign Authorization to Manage Specific Agreements	200
Create Agreement Asset Sources	201
Maintain Valid Agreement Asset Classifications	204
Create Agreements	207
Specify Agreement Parties	208
Specify Agreement Contacts	210
Specify Valid Agreement Asset Sources	211
Specify Agreement Modifications	213
Specify Agreement Authorizations	215
Store Agreement Text	217
Add Pictures	219
Add Attachments	222
Create Agreement Assets	224
Use the Maintain Agreements Screen to Create Agreement Assets.	225
Use the Maintain Agreement Assets Screen to Create Agreement Assets	227
Define Alternate Agreement Asset Identifiers	230
Review the Agreement Asset	233
Agreement Asset Summary and History Field Terms	235
Maintain Agreements	238

Edit Agreements	239
Track Modifications	241
Maintain Object Audit Status	241
Object Audit Log	243
Close Agreements	244
Maintain Agreement Assets	246
Edit Agreement Assets	247
Change Agreement Asset Information	249
Maintain Agreement Asset Ongoing Events	251
Transfer Agreement Assets	253
Transfer Agreement Asset Value	255
Inactivate Agreement Assets	257
Agreement Asset Inactive Receival Request	258
Withdraw Inactive Receival Request	260
Request Inactive Asset Redeployment	261
Withdraw Inactive Redeployment Requests	263
Retire Agreement Assets and Agreements	264
Retire Agreement Assets	266
Retire an Agreement	268
Reinstate Agreement Assets	270
Excess Agreement Assets	272
Request Agreement Asset Excess Receival	273
Withdraw Agreement Asset Excess Receival	275
Utilize Excess Assets	276
Use Asset Search	277
Create Excess Asset Reservations	279
Agreement Reports	281
Agreement Assets Report	282
Agreement Assets Report Output	284
Agreement Assets (Global Information) Report	285
Agreement Assets (Global Information) Report Output	287
Agreement Activity Report	288
Agreement Activity Report Output	290
Agreement Additions and Deletions	291
Agreement Additions and Deletions Report Output	292
Agreement Asset Activity Summary by Asset Flag	293
Agreement Asset Activity Summary by Flag Report Output	294

Agreement Asset Activity Summary by Asset Type	295
Agreement Asset Activity Summary by Asset Type Report Output	296
Agreement Asset Interface Processing Results	297
Agreement Asset Interface Processing Results Report Output	298
Agreement Asset Ongoing Events	299
Agreement Asset Ongoing Events Report Output	300
Agreement Asset Summary by Asset Flag	301
Agreement Asset Summary by Flag Report Output	302
Agreement Asset Summary by Asset Type	303
Agreement Asset Summary by Asset Type Report Output	304
Agreement Asset Utilization	305
Agreement Asset Utilization Report Output	307
Asset Search Report	308
Asset Search Report Output	310
Purchase Order Aging Report	311
Purchase Order Aging Report Output	313
Excess Asset Report	314
Excess Assets Report Output	315

4 INACTIVE ASSETS 317

About Inactive Assets	318
Inactive Module Workflow	319
Inactive Roles	320
Inactive Menu Access	321
Inactive Receival Requests	322
Create Inactive Receival Requests	323
Withdraw Inactive Receival Requests	325
Accept Inactive Receival Requests	326
Deny Inactive Receival Requests	329
Assets with Pending Excess/Inactive Requests Report	330
Assets with Pending Excess/Inactive Requests Report Parameters	331
Assets with Pending Excess/Inactive Requests Report Output	332
Excess/Inactive Receival Form	333
Assets with Excess/Inactive Receival Form Report Parameters	334
Excess/Inactive Receival Form Report Output	335
Create Inactive Assets	336
Create Inactive Assets From Inactive Receival Requests	338

Create Inactive Assets from Scratch	339
Maintain Inactive Assets Field Terms	341
Maintain Inactive Assets - Page 2	345
Mass Asset Creation	347
Maintain Inactive Assets - Duplication	348
PO Interface - Duplication	349
Manage Inactive Assets	350
View Inactive Asset Details	351
Review The Asset Event History	353
Timeline Creator Information	355
Asset Summary and History Field Terms	356
Edit Inactive Asset Details	359
Inactive Assets Report	361
Inactive Assets Report Output	363
Re-Utilize Inactive Assets	364
Search For Inactive Assets	364
Asset Search Report	366
Request Inactive Asset Redeployment	367
Withdraw Inactive Redeployment Requests	369
Excess Inactive Assets	370
Request Inactive Asset Excess Receival	371
Withdraw Inventory Asset Excess Receival	373
Retire Inactive Assets	374
Create an Inactive Asset Final Event	375
Reverse Inactive Asset Final Events	377
Inactive Reports	378
5 EXCESS ASSETS	381
About Excess Assets	382
Excess Module Workflow	383
Excess Roles	384
Excess Menu Access	385
Excess Manager vs. Excess Clerk	386
Excess Setup	387
Define Excess Review Categories	387
Define Asset Conditions	389
Define Excess Review Rules	391

Define Excess Review Types	394
Define Excess Review Requirements	396
Create Excess Assets	400
Create Excess Assets From Other Interest Assets	401
Excess Receival Form	405
Excess Receival Form Sample Report	406
Assets with Pending Excess/Inactive Requests	407
Create Excess Assets From Receival Requests	408
Screen Assets.	409
Define Screening Periods.	411
Batch Excess Assets	411
Add Excess Assets to an Existing Batch	414
Extend Excess Asset/Batch Review	416
Manage Excess Asset Reservations	417
Adjust an Excess Asset Reservation	419
Retire Excess Assets	421
Create Lot Masters	422
Add Lots to Lot Masters	424
Record an Excess Lot Final Event	426
Create Excess Asset Final Event	427
Reverse an Excess Assets Final Event	429
Excess Reports	431

6 MANAGE PHYSICAL INVENTORY 433

About The Review Module	434
Review Module Workflow	435
Review Campaign Lifecycle	436
Review Roles	437
Review Menu Access	438
Review Manager vs. Review Clerk	439
Review Manager	439
Review Clerk	439
Manage Review Campaigns	440
Create Review Campaigns	441
Create Base Assets	445
Creation Methods	445

- Sample Types 448
- Freeze Base Assets453
- Link Base Assets to Existing Resolutions.....455
- Maintain Review Accruals.....457
- Manage Resolutions..... 458**
 - Record Resolutions.....458
 - Define Valid Resolution Types459
 - Create Resolutions462
 - Lookup Inventory Asset Resolutions464
 - Delete Resolutions466
 - Load Resolutions From an External Source.....468
 - Edit Resolution Interface Records469
 - Review and Correct Errors in the Interface Tables 471
 - Close Review Campaign.....472
- Review (Physical Inventory) Reports 474**
 - Review Campaign Properties475
 - Review Campaign Properties Report Parameters 476
 - Review Campaign Properties Report Output 477
 - Review Resolution Summary479
 - Review Resolution Summary Report Parameters..... 480
 - Review Resolution Summary Report Output..... 481
 - Executive Review Resolution Summary.....482
 - Executive Review Resolution Summary Report Parameters 483
 - Executive Review Resolution Summary Report Output 484
 - Review Campaign Base Assets485
 - Review Campaign Base Assets Report Parameters..... 486
 - Review Campaign Base Assets Report Output..... 487
 - Review Campaign Base Assets with Resolution Information488
 - Review Campaign Base Assets with Resolution Information Report Parameters489
 - Review Campaign Base Assets with Resolution Information Report Output490
 - Other Review Reports.....491

7 PERSONAL ASSET PROVISIONING493

- About Personal Asset Provisioning 494**
- Personal Asset Provisioning Roles 495**
 - Personal Asset Provisioning Menu Access496
- Setup of Personal Asset Provisioning 499**

Create Initial Asset Event Types	500
Create Final Asset Event Types	502
Define Valid Asset Event Types	504
Define Valid Asset Event Types for Inactive Assets	504
Define Valid Asset Event Types for Inventory Assets	507
Define Default Event Types for Stock Assets	508
Create a New Manufacturer	511
Create Issue and Return Points	513
Maintain Issue and Return Point - Site Location	514
Maintain Issue and Return Point - Building Location	516
Maintain Issue and Return Point - Room Location	518
Create Catalog Entries	520
Create Property Records	523
Create Identified Property Records (Assets)	524
Create Commodity Property Records (Assets)	526
Personal Asset Provisioning	528
Stock Asset Transactions	528
Select an Issue and Return Point (Location)	530
Issue Assets	531
Return and Exchange Stock Assets	535
Return Stock Assets	536
Exchange Assets	539
Identify Lost, Stolen, or Damaged Assets	542
Consolidate Commodity Stock Assets	545
Perform Asset Search	547
Asset Search Report Output	549
Retire Stock Assets	550
Create an Excess Receival Request	550
Create an Asset Final Event	553
Reverse an Asset Final Event	555
Reactivate Assets	557
Create Personal Asset Provisioning Reports	558
Generate a Previously Run Report	559
8 IT COMPONENTS	561
About IT Components	562

9 PO INTERFACE	563
About The PO Interface	564
PO Interface Records Process	565
Standard Acquisition Process	567
Create an Asset Record From a PO	568
Retrieve a Purchase Order	569
Non-Property Flag	571
Completed Flag	571
Allocate Purchase Order Line Items	573
Asset Tab	575
Initial Event Tab	577
Value Components Tab	578
Agreements Tab	580
Edit PO Interface Records	582
Edit Inventory Asset Interface Records	583
Reviewing Errors in the Interface Tables	584
Correcting Errors in the Interface Tables	585
Verifying Asset Records Created from the PO Interface	586
Variations on PO Interface Asset Creation	587
Duplication	587
Create an Asset From Multiple PO Line Items	589
Non-Property Items	592
PO Interface Records Field Terms	594
INDEX	595



PREFACE

The *Sunflower Assets® User Guide* is your manual to understanding the features and functionality provided by Sunflower Assets. This guide provides insight, overviews and instructions that have been incorporated into this version of Sunflower Assets.

This guide includes the following chapters:

- “Inventory Assets”
- “Finance”
- “Agreements”
- “Inactive Assets”
- “Excess Assets”
- “Events”
- “Manage Physical Inventory”
- “Personal Asset Provisioning”
- “IT Components”
- “PO Interface”

ABOUT THIS GUIDE

The *Sunflower Assets® User Guide* is an introduction to common features and functionality available with Sunflower Assets. This guide is intended to be a comprehensive guide for the Sunflower Assets product.

INTENDED AUDIENCE

This guide is written for multiple audiences with different roles that support and use Sunflower Assets.

ADMINISTRATORS

This guide provides administrators who are responsible for maintaining and configuring Sunflower applications with illustrations and discussions that address key features and setup procedures for Sunflower applications. This guide assumes that you have knowledge of your operating system and the relational database that supports your environment.

FUNCTIONAL USERS

This guide provides functional users who are responsible for asset management and reporting accountable property the knowledge to setup and work with Sunflower applications.

DOCUMENT CONVENTIONS

This guide uses the following formatting conventions:

STYLE	MEANING
Bold	Field Term, Menu Name or Screen Name.
<i>Field Value</i>	Input Value or List Of Values.
<i>Emphasis</i>	Emphasized subject.
NOTE:	Provides additional facts.
Warning:	Issues a warning to the reader.
Tip:	Provides users with helpful tip.



INVENTORY ASSETS

The Inventory Assets chapter discusses the asset management processes that make up the day-to-day management of inventory assets. The discussion emphasizes those procedures that are used to manage and report on inventory assets from creation to retirement.

KEY CONCEPTS

This chapter includes the following discussion points and concepts:

- “About Inventory Assets”
- “Inventory Asset Roles”
- “Create Inventory Assets”
- “Maintain Inventory Assets”
- “Inactivate Inventory Assets”
- “Excess Inventory Assets”
- “Retire Inventory Assets”
- “Management Reports”

ABOUT INVENTORY ASSETS

One of the primary tasks of asset management is the creation and maintenance of asset records, commonly referred to as inventory assets. From creation, to the retirement of an inventory asset, Sunflower Assets enables you to manage and oversee your organization's vast and diverse asset base.

Sunflower Assets provides the ability to monitor information about inventory assets and to create insightful reports that can be used to identify those assets requiring upgrades, maintenance or underutilization by an organization.

This chapter provides an examination of the different methods Sunflower Assets provides to capture information about inventory assets throughout the asset's lifecycle.

INVENTORY ASSET MANAGEMENT WORKFLOW

The Management (MGMT) module handles three primary functions: creation, management and disposal of inventory assets. The workflow diagram below depicts these functions based on the menu items found within the Management module.

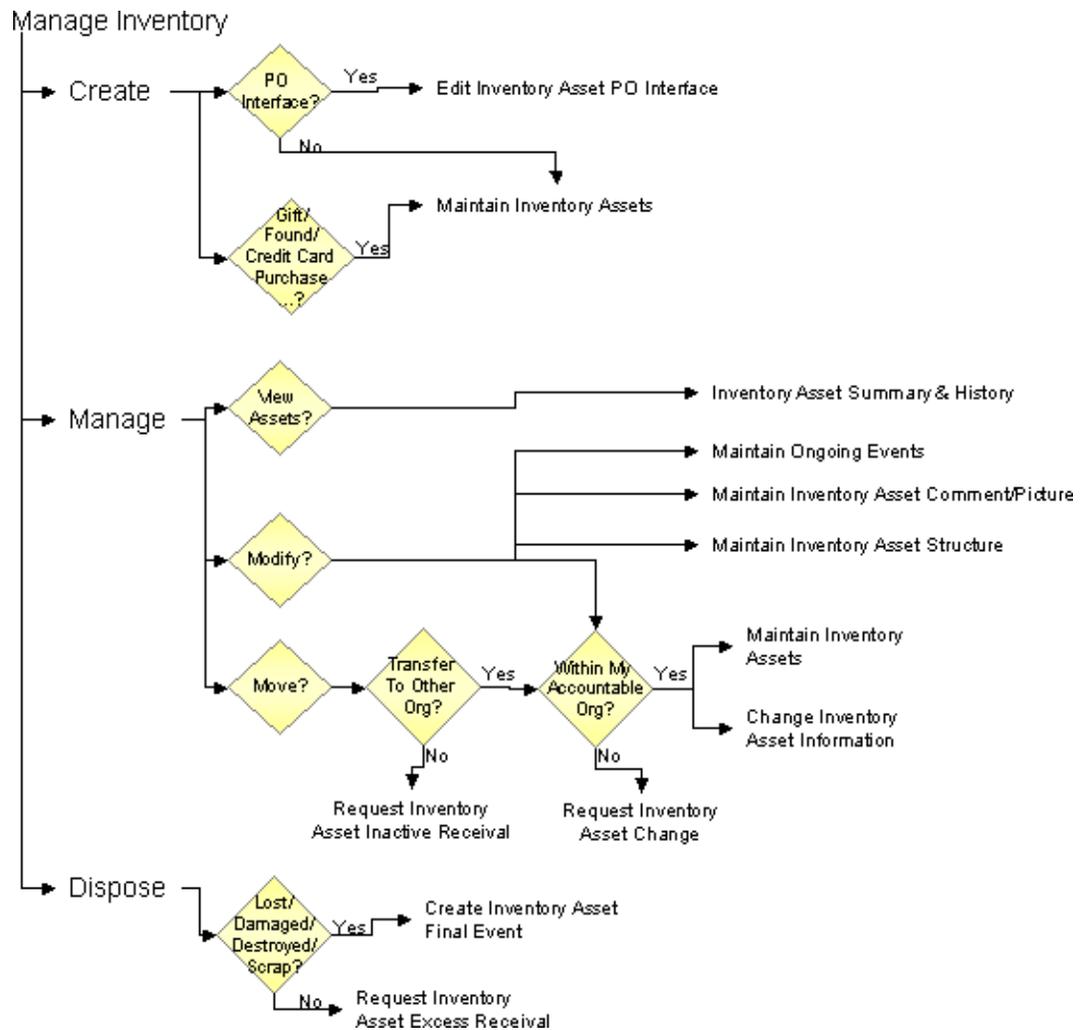


Figure 1-1: The Management Module Workflow

INVENTORY ASSET ROLES

Sunflower approaches asset management with the belief that you can manage, monitor, control, and account for an asset throughout its distinct lifecycle. Sunflower does not impose the way in which you have to manage your assets but provides guidelines, structures, processes, and tools to help you manage them effectively. The users that you assign to manage the various aspects of an asset at each stage of the lifecycle will depend upon your organizational structure and processes.

A Sunflower user is any individual to whom you assign one or more roles. The assignment of Sunflower roles enables users to perform job duties that are enabled by the specified role. Roles provide access to screens and define the extent to which an individual can perform functions such as adding, updating, and retiring asset records. The user in question may be an employee or a contractor working on the behalf of your organization who has a job function that requires either active (e.g. create, update or delete functions) or passive (e.g. general inquiry, searching and reporting) use of menu items in the Inventory module.

Sunflowers' management roles include Inventory Managers, Inventory Clerks and Asset Center Representative (ACR). Depending upon your organizational structure, you may find that in a small, or centralized organization that you assign most of the users as Inventory Managers responsible for performing all or many of the tasks related to asset management with a small number of users assigned as Inventory Clerks or Asset Center Representatives to carry out the daily business process.

For more information about Sunflower application roles, see the Roles chapter of the Sunflower Enterprise User Guide.

MANAGEMENT MENU ACCESS

The Management module uses three roles to manage inventory assets. These three roles are the **Inventory Manager**, **Inventory Clerk**, and **Asset Center Representative (ACR)**.

When assigning these roles to users, it is important to map out the functional responsibilities of your users and decide based on the tasks that each user must perform how to assign the appropriate application role. The table below lists menu access within the Management module based upon the Management roles.

MENU ITEM	ROLE		
	INVENTORY MANAGER	INVENTORY CLERK	ASSET CENTER REPRESENTATIVE (ACR)
Maintain Inventory Assets	Yes	Yes	--
Inventory Asset Summary and History	Yes	Yes	Yes
Asset Search	Yes	Yes	Yes
Maintain Catalog Entries*	--	--	--
Transfer Inventory Asset Value	Yes	Yes	--
Maintain Inventory Asset Ongoing Events	Yes	Yes	--
Create Inventory Asset Final Events	Yes	Yes	--
Edit Inventory Asset Interface Records	Yes	Yes	--
Process Inventory Asset Interface Records	Yes	Yes	--
Process Inventory Asset PO Interface Records	Yes	Yes	--
Edit Asset Value Component Interface Records	Yes	Yes	--
Change Inventory Asset Information	Yes	Yes	Yes
Request Inventory Asset Information	Yes	Yes	Yes
Close Inventory Asset Requests	Yes	Yes	Yes
Maintain Inventory Asset User Fields	Yes	Yes	Yes
Maintain Inventory Asset Comment/Picture	Yes	Yes	Yes
Maintain Asset Structures	Yes	Yes	Yes
Management Reports	Yes	Yes	Yes

*Inventory Clerks and Managers have access to the **Maintain Catalog Entries** screen if you assign them the AS_CATALOGER role.

CREATE INVENTORY ASSETS

As a member of the property management team, one of your primary responsibilities is the creation of property records or inventory assets. Sunflower provides several methods to create inventory assets. Whether you are creating a simple asset from scratch, a composite asset from multiple purchase orders, or if you need to create multiple inventory assets at once from a single purchase order line, Sunflower enables you to complete these and similar transactions with the Management module.

NOTE: If you are using the Sunflower Sentry product to checkout assets from a **Check-In-Out Point**, you will need to assign assets to those steward organizations and locations that make up your Check-In-Out Points. For more information about creating Check-In-Out Points, see the Sentry Administration chapter in the The Sunflower Enterprise Administration Guide.

You can either use an interface to import legacy data that designates the assets property characteristics such as steward organization and location, or you can assign this information to the assets using the **Maintain Inventory Assets** screen. To establish inventory assets, you will follow your business requirements and policies as a guideline for creating your asset records.

This section discusses the following topics:

- “Single Asset Creation”
- “Mass Asset Creation”
- “Release and Accept New Assets”

Sunflower provides a purchasing interface to use data that was generated from a purchasing application to create an asset.

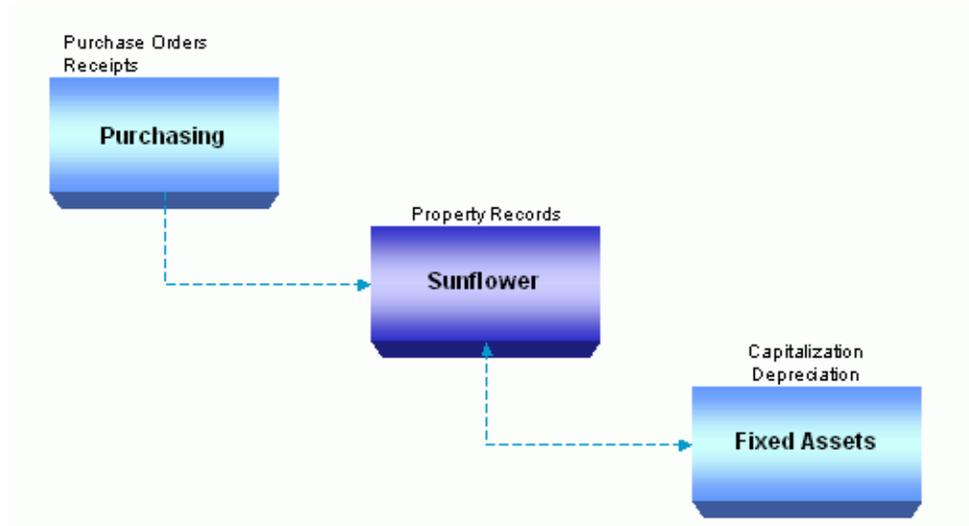


Figure 1-2: Tying Sunflower Into the Financial System Process

Those assets that you purchase are recorded as an acquisition cost. A procurement document can be a PO, delivery order, credit card purchase, or any other purchase order document. In most cases, the cost of an asset is equal to the amount of money exchanged for the asset and any associated costs to prepare the asset for its intended use. These associated costs can include freight, shipping, taxes, site preparation, installation, testing, and reconditioning.

Once a purchase order is transmitted to Sunflower, a shell asset is created. Based upon your business processes you can create asset records under the following situations:

- PO created and sent to vendor, item(s) have not yet arrived (shell record). Awaiting additional information such as Serial Number, Location, User, etc.
- PO created and sent to vendor, item(s) have arrived (actual record). Entry of all related data can be performed.

A Property Manager will determine which PO lines make up an asset. If you want to capitalize the newly created asset, you can reflect the capital asset details in the Sunflower Assets Finance module or a 3rd party financial system via a real-time process interface. Alternatively, you can create inventory asset records from scratch in the Management module.

SINGLE ASSET CREATION

Sunflower Assets simplifies the process of creating and maintaining assets. As an asset management professional, you will often find the need to add individual assets to your property management system of record. Sunflower Assets provides several screens and interfaces that simplifies the process of adding individual assets with or without purchase order information, updating asset information and transferring assets to and from your organization.

This section discusses how to create a single asset record using the following two methods:

- “Create Assets Using the Maintain Inventory Assets Screen”
- “Create Assets Using the PO Interface Feature”

CREATE ASSETS USING THE MAINTAIN INVENTORY ASSETS SCREEN

The **Maintain Inventory Assets** screen is an integral feature in Sunflower Assets that you will use frequently in the day-to-day management of inventory assets. You can use the **Maintain Inventory Assets** screen to create assets in an ad hoc manner. For example, you may want to track assets that your organization fabricates for custom applications. These assets were not purchased so there is no purchase order information to refer to when creating the asset records for the newly fabricated items. You can use the **Maintain Inventory Assets** screen to create asset records for the fabricated items.

In addition, the **Maintain Inventory Assets** screen enables you to update the descriptive information (e.g. **Location, Custodian, and Asset Condition**) for an inventory asset, as well as create catalog entries, or add a comment or picture.

Use the **Maintain Inventory Assets** screen to:

- Create Assets From Scratch
- Modify Asset Details (e.g. custodian and location changes)

NOTE: Use the **Maintain Inventory Assets** screen for the assets you will manage with the Sunflower Sentry product by mapping the asset’s steward and location information to the designated Check-In-Out Point. The steward in this case is the organization previously used to define the Check-In-Out Point.

Scenario: The following graphic illustrates how to create an asset from scratch. In this example, a new Apple computer is being created as an inventory asset.

NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets

The screenshot shows the 'Maintain Inventory Assets' form with the following data entered:

Field	Value
Identifier	0201
Unique Name	
Default Location*	LIVERMORE_BUILDING_G_ROOM_200
Catalog Identifier*	1
Manufacturer	APPLE
Official Name	COMPUTER PORTABLE
Serial Number	929302
Initial Event	PURCHASE
Asset Value*	\$4,500.00
Acquisition Date	01/01/1995
Responsibility Date	01/01/1995
Activity Status	IN SERVICE
Manager	SUNFLOWER SYSTEMS
Steward	ASSET CENTER 02
Custodian	050598
User	DOE
Location*	LIVERMORE_BUILDING_G_ROOM_200

Figure 1-3: Creating Inventory Assets From Scratch

Step 1. Navigate to the **Maintain Inventory Assets** screen.

Step 2. Enter a new asset identifier in the **Identifier** field for the new computer.

Step 3. Enter the asset's information accordingly. For more information, see "Maintain Inventory Assets Field Terms" on page 10.

Select the **Copy to Location?** checkbox to copy the **Default Location** value to the **Location** field.

Step 4. Click the **Save** icon to save your asset record.

NOTE: To checkout assets with the Sunflower Sentry application, assets must be assigned authorized stewards and locations. These stewards and locations combinations map to designated **Check-In-Out Points** that are established with the **Maintain Organization** screen. For more information about establishing **Check-In-Out Points**, see the Sunflower Enterprise Administration Guide, Sentry Administration chapter.

MAINTAIN INVENTORY ASSETS FIELD TERMS

The following table lists the details of each field on the **Maintain Inventory Assets** screen.

Maintain Inventory Assets Field Terms

FIELD NAME	Description/Explanation
Identifier	Identifier assigned to an inventory asset.
Type (Asset Identifier)	<p>The asset identifier Type assigned to the asset, (e.g. tageable, non-tageable, etc.). An example of how you might use this feature is to indicate that an asset is being tracked but is not directly tageable. You may have assets that would be impractical to try to affix a barcode or other type of identifier directly to the asset. By indicating that the asset is not directly tageable, you can alert your staff to look for the asset identifier in another logical location when indicating the asset is not tageable.</p> <p>Asset identifier types are maintained as Domains in the Administration module. You must create your asset identifier types before you can assign them throughout the application.</p>
Existing Interest Asset Type Identifier	<p>Specifies the type of interest asset (e.g. inventory, agreement, inactive, excess etc.) Leave blank if this asset record does not exist in the systems as another interest asset type.</p> <p>For example, you may have an Inactive asset with its own Inactive Asset Identifier that you want to convert into an active Inventory asset. You can reference an existing Inactive interest asset Type with its corresponding Inactive interest asset Identifier and Sunflower Assets will populate all of the corresponding information for that asset in the Maintain Inventory Assets fields.</p>
Released	The default value is N . Upon saving, the value changes to Y to release the asset into ownership to the steward organization designated in the Steward field.
Unique Name	The Unique Name is a data set on items that is globally unique, unambiguous and robust enough to ensure that information is consistent through the life cycle of the asset and supports the multifaceted business applications and users.
Default Location	Specifies the default location for an inventory asset. For assets that are frequently borrowed from a Check-In-Out Point , the Default Location specifies the asset's location when it is not loaned out to a borrower.
Copy to Location?	Selecting this checkbox copies the value ion the Default Location field to the Location field.
Catalog Identifier	<p>The Catalog Identifier field automatically populates upon specifying the designated Manufacturer and Model Number combination. Alternatively, if you know the Catalog Identifier, you can enter the value here and the corresponding manufacturer and model number information is populated based on the Catalog Entry.</p> <p>For more information about Catalog Entries, see the Catalog Management chapter of the Sunflower Enterprise Administration Guide.</p>
Commodity Asset	The Commodity Asset checkbox is marked if the asset is designated as an asset using the Commodity button at the bottom of this page.

Maintain Inventory Assets Field Terms (Continued)

FIELD NAME	Description/Explanation
Parents	<p>The Parents field displays the number of parent records for the current asset record that you are viewing. If an asset has a parent asset association, the number of associations displays in the Parents field. An asset can have multiple parents.</p> <p>Double click in the Parents field to view the detail parent record information on the Maintain Asset Structures screen where you can view the parent record information for the selected asset. For more information about Parent Child assets, see “Maintain Asset Structures (Parent/Child Relationships)” on page 43.</p>
Children	<p>The Children field displays the number of child records for the current asset record that you are viewing. If an asset has a child asset association, the number of associations displays in the Children field. An asset can have multiple children.</p> <p>Double click in the Children field to view the detail child record information on the Maintain Asset Structures screen where you can view the child record information for the selected asset. For more information about Parent Child assets, see “Maintain Asset Structures (Parent/Child Relationships)” on page 43.</p>
C/A/P	The C/A/P field indicates if there is a comment C , attachment A , or picture P attached to the selected inventory asset record.
Manufacturer	Double-click to select from the list of values a valid manufacturer name. If the value you are looking for does not appear in the list of values, use the Administration module to add the new Manufacturer name to the list of valid Organizations . For more information about adding manufacturers, see the People and Organization chapter of the Sunflower Enterprise Administration Guide.
Model Number	Double-click to select from the list of values. If the value you are looking for does not appear in the list of values, use the Management module Maintain Catalog Entries screen to add the corresponding manufacturer and model number combination.
Official Name	The Official Name field automatically populates upon specifying the Manufacturer and Model Number . You create Official Names for Manufacturer and Model combinations by using the Maintain Catalog Entries screen. For example, the Apple computer in this example is assigned as a Computer-Personal. You could change the Official Name to PC, Desktop, Laptop etc.
Serial Number	Enter the serial number for the asset. If there is no serial number for the asset, leave blank.
Drawing No	Enter the drawing number used to design and construct the asset. Generally used for architectural and construction projects.
Initial Event	Double-click to select from the list of values. This field can be extended to capture your business practice specific information. Asset Initial Events are maintained as Domains in the Administration module. You must set up your asset initial events before you can assign them throughout the application.
User Fields	Double-Click to open up this complex field for data entry. In this case, the User Field captures the context based information for a Purchase Initial Event has been extended to capture the Purchase Order , Purchase Order Line and Purchase Account information from a PO. Leave Blank if there is no corresponding PO information for the corresponding initial event. You can define the context for the user fields specific to the screens and interest assets. User fields enable you to personalize the application to provide additional information that is not available when using the standard application. For more information, see “Edit Inventory Asset Records” on page 30.

Maintain Inventory Assets Field Terms (Continued)

FIELD NAME	Description/Explanation
Asset Value	<p>Double-click to open the Asset Value Components block and specify the asset value components.</p> <p>Asset Value Types are Domains that you specify in the Administration module. You will define these types based on your organization's business practices. The value components of an asset can be comprised of several different activities (e.g. acquisition cost, shipping, site preparation, installation, upgrades etc.).</p> <p>Enter the cost of the asset. Do not enter \$, commas, or.00. 1500 is the same as \$1,500.00.</p> <p>You can use the Administration module to extend the Asset Value Component user defined field (User Fields) to accommodate your business practices.</p> <p>The Cap? (Capitalize?) field tells you if an asset is capitalized. You can capitalize an asset with the Finance module using the Capitalize Financial Assets screen. It is a display only field on this screen.</p>
Acquisition Date	Enter the date the asset was purchased. MM/DD/YYYY format. Double-click to use the Calendar function to select your date from Calendar pop-up window.
Responsibility Date	Enter the date in which you took ownership of the asset. MM/DD/YYYY format. Double-click to use the Calendar function to select your date from Calendar pop-up window.
Asset Condition	<p>Used to specify the current working quality of the property. Select from the list of values the appropriate condition of the asset.</p> <p>If you cannot find the appropriate selection, you can create the value in the Administration module by using the Maintain Asset Conditions screen.</p> <p>For more information about Asset Conditions, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.</p>
Effective Date	The date that the asset becomes active in the Sunflower Assets database. MM/DD/YYYY format. Double-click to use the Calendar function to select your date from Calendar pop-up window.
Expected Return Date	When loaning property, enter the date that you expect to have the property returned. MM/DD/YYYY format. Double-click to use the Calendar function to select your date from Calendar pop-up window.
Activity Status	<p>Used to specify the current state of the property. (e.g. In Service, Inactive, etc.)</p> <p>You can add activity statuses using the Administration module Maintain Activity Statuses screen.</p> <p>For more information about Activity Statuses, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.</p>
Flags	<p>Double-click to open the Asset Flag complex field to specify special conditions for the asset. (e.g. sensitive, hazardous etc.) Leave blank if there are no special conditions to apply to the asset. In this case, the computer has been marked as sensitive. Although the computer itself may be benign, the data residing on the computer hard drive may be of a sensitive nature.</p> <p>To add asset flags, use the Administration module Define Asset Flags screen. (Other typical flags might be Flammable, Keep Dry, Corrosive, etc.)</p> <p>For more information about Asset Flags, see the User Extensibility chapter of the Sunflower Enterprise Administration Guide.</p>

Maintain Inventory Assets Field Terms (Continued)

FIELD NAME	Description/Explanation
Activity Type	<p>Enter the Activity Type for the asset. For example, you may want to use an asset for various research projects. You can update the Activity Type field to reflect the project that is currently using the asset.</p> <p>For more information about Activity Types, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.</p>
Managed By	<p>Specify the managing organization of the asset. You create managers by using the Administration module Maintain Organizations screen and assigning the organization as a <i>Manager</i> organization structure.</p>
Owner	<p>Specify the owning organization of the asset. You create owners by using the Administration module Maintain Organizations screen and assigning the organization as an <i>Owner</i> organization structure.</p>
Steward	<p>Specify the steward of the asset. You create stewards by using the Administration module Maintain Organizations screen and assigning the organization as a <i>Steward</i> organization structure.</p>
Accepted?	<p>Specifies if an asset has been accepted by the steward organization. The default value is <i>Y</i> (Yes).</p>
Rep	<p>The name of the Steward's primary ACR (Asset Center Representative).</p>
Custodian	<p>Specify the custodian of the asset. You can select a Custodian by either their Last Name, First Name or Identifier. A Custodian identifier can be an employee ID or badge number that is unique to that individual.</p>
User	<p>Specify a specific user of the asset if applicable. You can select a User by either their Last Name, First Name or Identifier. A User identifier can be an employee ID or badge number that is unique to that individual.</p>
Location	<p>Double-click to open the Location complex field and assign the asset location accordingly. You can create locations using the Administration module Maintain Locations screen and its supporting maintenance screens to capture your organization's set of locations.</p> <p>For more information about setting up locations, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.</p>
Document	<p>Enter the related asset Document information such as type of supporting documentation, documentation identifier, storage type and organization for an asset.</p> <p>You can use the Administration module Maintain Domains screen to create and edit the Document Type and Document Storage Type domains to fit your business practices.</p> <p>For more information about defining up document types, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.</p>
User Fields	<p>User Defined Fields (UDFs) data entry is based upon your business practices/needs. User fields enable you to personalize the application so that users can provide additional information that is not available when using the standard application.</p> <p>In this example, the UDF is a context free extension of the Inventory Asset State. You can provide the asset weight in this case.</p> <p>For more information, see "Edit Inventory Asset Records" on page 30.</p>
Global User Fields	<p>Global User Defined Fields (UDFs) data entry is also based upon your business practices/needs. Global user field information is applicable to all interest asset states. This field is tied the Asset State</p> <p>In this example, the UDF is a context based extension of the Asset State which is tied to the Catalog Entry Asset Type information for this asset.</p>

Maintain Inventory Assets Field Terms (Continued)

FIELD NAME	Description/Explanation
Page 2	Click to display the pop-up window for Page 2 which contains the Catalog Entry information for this asset.
Comment	Click to open the Comments, Attachments and Pictures screen. Add any supporting comments, attachments or pictures for the asset.
Re-Request	You can use the Re-Request button to create a new request to transfer the displayed asset if the prior request was denied. For more information about asset transfers, see "Transfer Assets" on page 49.

MAINTAIN INVENTORY ASSETS - PAGE 2

Use the **Page 2** button to view additional catalog information. Many of the fields on this screen are display only when viewing in this manner. You can, however, use this screen to provide override values for **Service Life**, **Salvage Value %** or **Replacement Value**. Use the **Maintain Catalog Entries** screen to create or edit the rest of the **Catalog Information** fields.

NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets
- Click Page 2

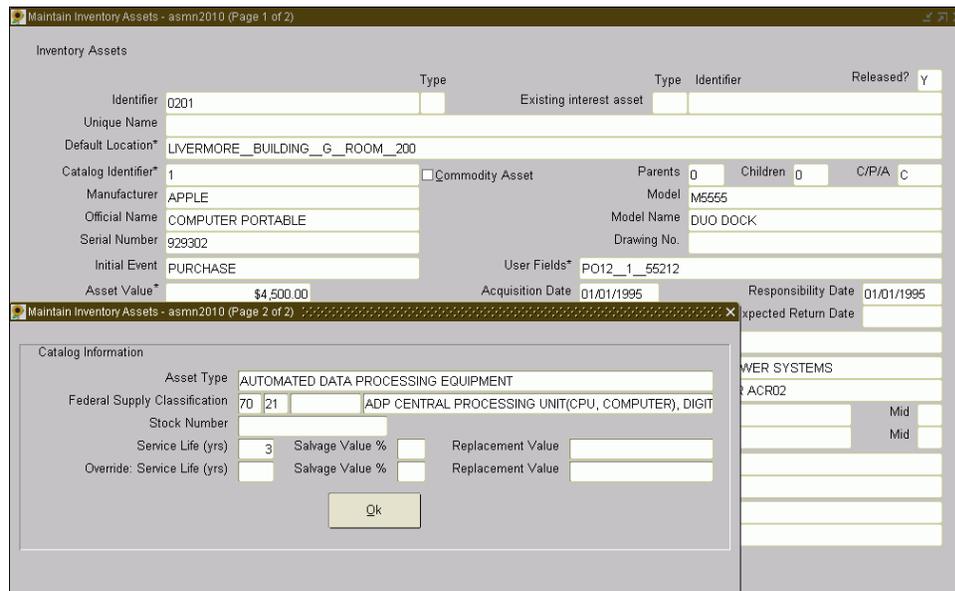


Figure 1-4: Displaying Page 2 (Catalog Information)

The majority of the fields on this screen are optional such as the **Federal Supply Classification** identifiers.

NOTE: Federal Supply Classification is not optional when working with Sunflower Contract Reports. This is required information for producing the NF1018 report.

Service Life will default to a specified value based on the asset type. For example, Security Equipment has a default value of 5 years.

Maintain Inventory Assets Page 2 Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
Asset Type	Displays the Asset Type assigned to this asset's catalog entry. Display only.
Federal Supply Classification	Displays the assigned Federal Supply Classification Group Number, Class Number, National Identification Number and long name for the asset. Display only. For more information about FSC codes, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.
Stock Number	Specifies the assets internal stock number or identification. Display Only
Service Life Override:	The assigned catalog entry service life (in years) for the specified asset type. Display only. You can use the Override Service Life field to enter an override value for the asset's service life.
Salvage Value % Override:	The assigned catalog entry Salvage Value % for the specified asset type. Display only. You can use the Override Salvage Value % field to enter an override value for the asset's Salvage Value % . Enter a value between 1 and 100.
Replacement Value Override:	The assigned catalog entry replacement value for the specified asset type. Display only. You can use the Override Replacement Value field to enter an override value for the asset's replacement value.

CREATE ASSETS USING THE PO INTERFACE FEATURE

You can use the Sunflower Assets PO Interface feature to create assets from PO information received from a purchasing system feed into the Sunflower application database. The PO Interface feature enables you to create one or more assets based on a single PO line item, or you can create a single composite asset based on several PO line items from multiple purchase orders. For more information on using the PO Interface, see Chapter 9, "PO Interface" on page 563.

MASS ASSET CREATION

Sunflower provides two methods for creating multiple assets. You can use the **Maintain Inventory Assets Duplication** feature to create multiple asset records with similar information or if you have multiple assets on a single PO line item, the **PO Interface Duplication** feature is a quick and easy way to create several assets at once. This section covers how to create multiple assets using the following methods.

- “Maintain Inventory Assets - Duplication” on page 16
- “PO Interface - Duplication” on page 18

MAINTAIN INVENTORY ASSETS - DUPLICATION

If you have several assets of the same type (e.g. 20 Dell Inspiron 1150 Laptops) that you need to create manually, you can use the **Maintain Inventory Assets Duplication** feature to create new asset records based on the definition of a previous or newly created asset record. Supply each duplicated asset record with a unique asset **Identifier** and **Serial Number** and verify that the **Location**, **Custodian**, and **User** information for each duplicate asset is accurate.

Scenario: The following graphic illustrates how to create duplicate records with the Maintain Inventory Assets Duplication feature.

NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets
- Click Open a Record
- Click F4 or Shift+F6

The screenshot shows a software window titled "Maintain Inventory Assets - asmn2010 (Page 1 of 2)". The main area is a form titled "Inventory Assets Duplicate Record". The form is divided into several sections:

- Header:** "Inventory Assets Duplicate Record" with a "Released?" checkbox checked (y).
- Identification:** Identifier (0201), Unique Name, Existing interest asset, Type, and Released? (y).
- Location:** Default Location* (LIVERMORE_BUILDING_G_ROOM_200), Copy to Location? checkbox, and Location* (LIVERMORE_BUILDING_G_ROOM_200).
- Asset Details:** Catalog Identifier* (1), Manufacturer (APPLE), Official Name (COMPUTER PORTABLE), Serial Number (929302), Initial Event (PURCHASE), Asset Value* (\$4,500.00), Acquisition Date (01/01/1995), Effective Date (05/23/2006), Responsibility Date (01/01/1995), Expected Return Date, Activity Status (IN SERVICE), Flags* (S), Activity Type, and User Fields* (PO12_1_55212).
- Management:** Manager (SUNFLOWER SYSTEMS), Steward (ASSET CENTER 02), Accepted? (y), Owner (SUNFLOWER SYSTEMS), Rep (TWO A R ACR02), Custodian (050598), Last Name* (DOE), User (), Last Name* (), First (JOHN), and Mid ().
- Footer:** Document*, User Fields*, Global User Fields*, Page 2, Commodity, Comment / Picture / Attachment, and Re-Request buttons.

Figure 1-5: Creating Duplicate Asset Records

- Step 1.** Click either F4 or Shift + F6 to duplicate an asset. Notice that *Duplicate Record* appears at the top of the screen.
- Step 2.** Enter a new **Identifier** for the duplicate asset.
- Step 3.** Enter a new **Serial Number**.
- Step 4.** Verify or update the **Location**, **Custodian**, and/or **User Fields**.
- Step 5.** Click the **Save** icon to save your asset record.

PO INTERFACE - DUPLICATION

The **PO Interface Duplication** feature enables you to create multiple assets from a single line item. For example, a common exercise could involve the purchase of several computers from the same manufacturer for the same model. Rather than creating each asset record from scratch, use the **PO Interface Duplication** feature to replicate the common information for each item from the selected line item. Although much of the asset information is the same, you must assign a unique asset identifier for each item. After creating an asset or specifying an existing asset, the details of that asset can be duplicated to create new assets.

Scenario: The following graphic illustrates how to create duplicate records with the PO Interface allocating line items from a PO. For more information about how to use the PO Interface to allocate line items, see Chapter 9, "Allocate Purchase Order Line Items" on page 573.

NAVIGATION

- Click Number in Duplicate field
- Click Times button

The screenshot displays the 'Process Inventory Asset PO Interface Records - aspo0010 (Page 3 of 3)' window. On the left, the 'Assets' table lists existing assets with checkboxes for selection. A 'Duplicate' field is set to '1' and the 'Times' button is highlighted. Below the table, there are options for 'Unprocessed Asset Records' (1) and 'Edit Existing Assets' (0). The main 'Asset' form on the right contains the following details:

- Identifier Type: [Empty]
- Catalog*: 1139
- Manufacturer: EN POINTE TECHNOLOGIES
- Model: 6105
- Official Name: SERVER
- Serial Number: [Empty]
- Acquisition Date: 06/11/2005
- Effective Date: 06/11/2005
- Responsibility Date: 06/11/2005
- Activity Status: IN SERVICE
- Flags*: [Empty]
- Asset Condition: 1 UNUSED - GOOD
- Manager: SUNFLOWER SYSTEMS
- Owner: SUNFLOWER SYSTEMS
- Steward: ASSET CENTER XX
- Custodian Identifier: [Empty]
- Last Name: [Empty] First: [Empty] Mid: [Empty]
- User Identifier: [Empty]
- Last Name: [Empty] First: [Empty] Mid: [Empty]
- Location*: LIVERMORE_BUILDING_100_ROOM_123
- Activity Type: [Empty]

Figure 1-6: Duplicating Asset Records with the PO Interface

Enter the number of duplicate assets that you wish to create in the **Duplicate** field. Press the **Times** button to add the new assets in the **Assets** block where they are assigned incremental asset identifiers or a **Tag Needed** indicator. Verify that each asset has been assigned a valid asset identifier. Modify the details of each asset before saving. When using an alphanumeric value asset identifier, any number of initial alpha characters terminated by a numeric value of one or more digits increments the numeric portion of the asset identifier and is assigned to each duplicate asset.

RELEASE AND ACCEPT NEW ASSETS

The benefit of using the Release and Accept feature is to prevent assets from being issued before they are ready to be employed by your organization. The release and accept process enables you to control the release of assets into your organization by preventing the automatic release of assets into your organization at the time of creation. Specifically, this feature employs the use of the parent-child relationship between inventory managers and clerks where clerks can create assets but only the manager can release the asset to your organization by reviewing the record and updating the release field from *N*(not released) to *Y*(released). The factory setting of this function is set to Y to enable clerks and managers to create and release assets to your organization automatically. Should you choose to enable this function, set the parameter value from *Y* to *N* using the *ASSETS-MANAGEMENT-AUTOACCEPT* parameter using the **Enter Registered Application Values** screen.

The following example guides you through the steps for releasing a new inventory asset. For more information about accepting new assets to your organization, see “Accept Request and make additional changes” on page 64.

NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets

The screenshot shows a software window titled "Maintain Inventory Assets - asrmn2010 (Page 1 of 2)". The window contains a form for managing inventory assets. At the top right, there is a "Released?" dropdown menu with the value "y" selected and highlighted by a blue box. The form includes various fields for asset identification, location, manufacturer, and dates. At the bottom, there are buttons for "Page 2", "Commodity", "Comment / Picture / Attachment", and "Re-Request".

Inventory Assets	Duplicate Record	Type	Type	Identifier	Released?
Identifier	0201	<input type="checkbox"/>	Existing interest asset		y
Unique Name					
Default Location*	LIVERMORE_BUILDING_G_ROOM_200				<input checked="" type="checkbox"/> Copy to Location?
Catalog Identifier*	1	<input type="checkbox"/> Commodity Asset	Parents	Children	C/P/A
Manufacturer	APPLE	Model		M5555	
Official Name	COMPUTER PORTABLE	Model Name		DUO DOCK	
Serial Number	929302	Drawing No.			
Initial Event	PURCHASE	User Fields*		PO12_1_55212	
Asset Value*	\$4,500.00	Acquisition Date	01/01/1995	Responsibility Date	01/01/1995
Asset Condition		Effective Date	05/23/2006	Expected Return Date	
Activity Status	IN SERVICE	Flags*	S	Activity Type	
Manager	SUNFLOWER SYSTEMS	Accepted?	y	Owner	SUNFLOWER SYSTEMS
Steward	ASSET CENTER 02	Rep	TWO A R ACRO2	First	JOHN
Custodian	050598	Last Name*	DOE	Mid	
User		Last Name*		Mid	
Location*	LIVERMORE_BUILDING_G_ROOM_200				
Document*					
User Fields*					
Global User Fields*					

Figure 1-7: Releasing Inventory Assets

Step 1. Navigate to the **Maintain Inventory Assets** screen.

Step 2. Enter a new asset identifier in the **Identifier** field for the new computer.

NOTE: After entering a value in a field, hit the Tab key to move to the next field. Sunflower automatically populates default values when defaults are available.

Step 3. Enter the asset's information accordingly.

- For more information, see "Maintain Inventory Assets Field Terms" on page 10.
- If you do not enter a value in a required field, Sunflower prompts you to do so.

Step 4. To release a new inventory asset to a steward, enter the steward's name in the **Steward** field.

Step 5. Click the **Save** icon to save your asset record. The release status has now changed from **N** to **Y**.

Use **Enter Registered Application Parameter Values** screen the to update the parameter setting for this feature. For more information about application parameter values, see the Parameters chapter of the Sunflower Enterprise Administration Guide.

.....
NAVIGATION

- **Click Admin**
- **Click User Extensibility**
- **Click Enter Registered Application Parameter Values**

Parameter Values				
Application	Category	Code	Description	Set?
ASSETS	MANAGEMENT	AUTOACCEPT	Automatically accept new inventory assets	<input type="checkbox"/>
Value				Y

Figure 1-8: Setting the AUTOACCEPT Application Parameter

MAINTAIN INVENTORY ASSETS

The Management module facilitates the detailed tracking of the relationships between assets, organizations and people as they change over time. After acquiring assets, these assets will need to be assigned a location, a responsible party and organization for each asset. Sunflower enables you to maintain your inventory assets by using several Management module screens to update the attributes of your inventory assets. Complimenting the **Maintain Inventory Assets** screen are the supporting Management module screens that enable the day-to-day management of your inventory assets. The **Maintain Inventory Asset Comment/Picture** screen provides the ability to attach supporting documentation, comments and pictures.

The **Request Inventory Assets Change** screen enables you to create and accept asset transfer requests to other steward organizations. To provide for individual and organization transfers, Sunflower uses a request/accept/deny model to ensure that accountability is not transferred without consent of both parties. This permits an organization or individuals to request that another organization or individual become accountable for an asset.

The **Change Inventory Assets Information** screen enables you make simultaneous mass updates to multiple assets within your organization. Additionally, there are administration features such as the **Edit Inventory Asset User Fields** screen, that extend the existing functionality of the Management module screens to match your business practices. Another useful Management module feature is the **Maintain Asset Structure** screen that can be used to manage Parent/Child asset structures. Finally, the Management module reports enable you to view the details and history of your inventory assets.

The following section illustrates several common management tasks that you can perform with the Management module.

- “View Inventory Asset Details” on page 22
- “Edit Inventory Asset Records” on page 30
- “Edit Comments, Attachments and Pictures” on page 32
- “Maintain Asset Structures (Parent/Child Relationships)” on page 43
- “Transfer Assets” on page 49
- “Transfer Inventory Asset Value” on page 65
- “Maintain Inventory Asset Ongoing Events” on page 66
- “Maintain Inventory Asset User Fields” on page 68

VIEW INVENTORY ASSET DETAILS

The **Asset Summary and History** screen is one of the most widely used screens in Sunflower Assets. The **Asset Summary and History** screens provide a view of the current and historical information of assets based on a specific interest asset (e.g. Agreement, Management, Finance, Inactive, and Excess). You can use this screen to perform a quick search of current and historical information for a single asset or a group of assets. The **Inventory Asset Summary and History** screen provides a read-only view of any inventory asset record available within the system. Sunflower records the history of every change made to an asset.

Scenario: The following graphic illustrates how to review an asset and its history.

.....

NAVIGATION

- Click Mgmt
- Click Inventory Asset Summary and History

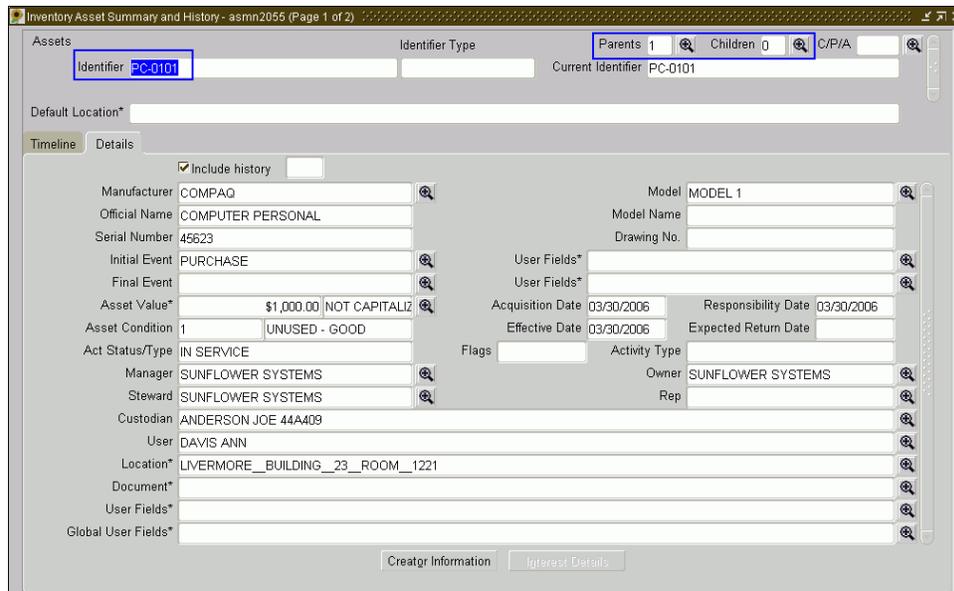


Figure 1-9: Inventory Asset Summary and History

Step 1. Navigate to the **Asset Summary and History** screen.

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

Step 3. Enter the asset identifier in the **Identifier** field.

Step 4. Press the tab key to display the summary page for the asset record.

To view the history for multiple assets, use the **Query Criteria** screen to search for and retrieve one or more assets based on the query criteria that you select.

Step 5. Scroll up and down to observe the changes to the asset. The latest information displays as the current record reflecting the changes. Click the **Next Record** icon to view the history.

Step 6. Click the **Details** icon adjacent to an attribute field on the **Inventory Asset Summary and History** screen to view the details of that attribute. For example, click the **Details** icon next to the **Manufacturer** field to display the **Review Organization** screen in display only mode.

Step 7. Click the closeout box (**X**) to exit out of the **Review Organization** screen and return to the **Asset Summary and History** screen.

Step 8. Click the **Timeline** tab to view the selected asset event, resolutions and requests history. For more information about how to view the history of asset events, see “Review The Asset Event History” on page 24.

REVIEW THE ASSET EVENT HISTORY

Use the Asset Timeline feature to review the events of an identifiable asset. The Asset Timeline feature is a simple query interface that enables you to select Events, Resolutions, Open Requests, Closed Requests, Reports and IUID/WAWF events to retrieve relevant information for a specified asset.

Scenario: The following graphic illustrates how to use the Asset Summary and History Timeline tab to review the history of an asset. The earliest rows (by date) reflect the initial event (PO purchase) of an inventory asset for the inventory asset, CET_001, and the current rows reflect a change in steward and location via a change request. This is a display only screen.

NAVIGATION

- Click **Mgmt**
- Click **Inventory Asset Summary and History**
- Select the **Include History** checkbox
- Click the **Timeline** tab

The screenshot shows the 'Inventory Asset Summary and History' window for asset 'DELL_D333_COMPUTER PERSONAL' with identifier 'CET_001'. The 'Timeline' tab is active, displaying a table of events. The table has columns for Datetime, Category, Description, and Attributes. The events are sorted by Datetime in descending order. The first event is a 'CLOSED REQUEST' for 'CHANGE STEWARD' on 10/10/2003 at 16:50:00, with attribute 'C2'. The second event is an 'OPEN REQUEST' for 'CHANGE LOCATION' on the same date and time, with attribute 'SENTRY-QALAB-1'. The third event is an 'ONGOING EVENT' for 'ASSET VALUE/QUANTITY INCREASE' on 10/10/2003 at 16:49:50, with attribute 'ACQUISITION COST_1000_0'. The fourth event is an 'INITIAL EVENT' for '(INV CET_001) PO PURCHASE' on 10/10/2003 at 00:00:00. There are also checkboxes for 'Include Events', 'Include Resolutions', 'Include Reports', 'Include Open Requests', 'Include Closed Requests', and 'Include IUID/WAWF'. A 'Get Records' button is visible at the bottom right of the table area.

Datetime	Category	Description	Attributes
10/10/2003 16:50:00	CLOSED REQUEST	CHANGE STEWARD	C2
10/10/2003 16:50:00	OPEN REQUEST	CHANGE LOCATION	SENTRY-QALAB-1
10/10/2003 16:49:50	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST_1000_0
10/10/2003 00:00:00	INITIAL EVENT	(INV CET_001) PO PURCHASE	

Figure 1-10: Viewing Asset Event History

Step 1. Navigate to the **Inventory Asset Summary and History** screen.

Step 2. Click the **Timeline** tab.

Step 3. Select asset events whose history you want to review from the following checkboxes:

- **Include Events**
 Events reflect the asset activity that occurs during the lifecycle of the asset. For example, **Initial Events** (e.g. Purchase, Subject to Agreement, Receive Inactive Asset), **Ongoing Events** (e.g. Change of Custodian, Change of User, Change of Location, Added to Agreement, Asset Value/Quantity Increase) and **Final Events** (e.g. Transfers, Retire, Lost Damaged Or Destroyed, Obsolete Asset)
- **Include Resolutions**
 Resolutions are a method for verifying that an asset record is accurate during a review campaign (Physical Inventory). For example, a resolution could be the barcode scan of an asset during a review campaign.
- **Include Open Requests**
 Open Requests reflect a transaction that is still awaiting a conclusion. For example, if you request a transfer of an asset to another custodian and that custodian has not closed the request by either accepting or denying the request, the request remains open and will appear on the **Timeline** grid as such. You (as the requestor of the transfer) can close the request by withdrawing the request.
- **Include Closed Requests**
 Closed requests reflect a transaction that has been completed.
- **Include Reports**
 Lists reports generated for the selected asset.
- **Include IUID/WAWF**
 Lists whether the selected asset has generated a virtual asset, asset mark, and upload to the IUID Registry.

Step 4. Click the **Find** icon to enter the query mode and click the **Find** icon again to execute the query.

The system returns all of the selected events that occurred for the selected inventory asset.

Step 5. Click the **Details** icon adjacent to a selected event on the **Timeline** grid to look at the details of an event.

Step 6. Click the closeout box (X) to exit out of the details view and return to the **Timeline** tab.

Step 7. Click on a column heading (e.g. **Category**) to change the sorting order of the events.

The default sort order for asset events is descending order for the event date (**DateTime**) and ascending order for the **Category** and **Description** columns.

Step 8. The **Ull** field displays the Ull generated for the selected asset. If a Ull has not been generated, the field displays *None Captured*.

Step 9. The **Other Identifier** field displays any other identifiers associated with the selected asset. Click the **Details** icon adjacent to this field to open the **View Asset Unique Identifier** screen.

This screen lists any additional identifiers associated with the selected asset and displays information about the Ull, Ull markings, whether the tag has been rendered and in what manner. (e.g. Bagged or Tagged)

Step 10. Click the **Timeline Report** button to open the **Asset Timeline** report criteria page

Step 11. Click the **Record Properties** button to open the **Record Properties** inspector window.

ASSET SUMMARY AND HISTORY FIELD TERMS

The following table defines the purpose of each field on the **Asset Summary and History** screen.

Asset Summary and History Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
Include History	When you select the Include History checkbox, the screen returns current and historical records for the selected inventory asset. To view the other records, click the Previous Record and Next Record icons on the Tool Bar. If you do not select Include History , the screen returns only the current record for the inventory asset.
Next/Previous Record Indicator	The field adjacent to the Include History checkbox indicates if there are multiple records for the selected inventory asset. A v indicates that you are viewing the most current record for the asset. You can scroll through the earlier records of an asset by selecting the Next Record icon to view the history of that inventory asset. A ^ v indicates that you can select either the Previous Record icon or Next Record icon to view the other records for the selected inventory asset. A ^ indicates that you are viewing the earliest record entry for the inventory asset and you can only scroll back through the inventory asset records using the Previous Record icon.
Parents	The Parents field displays the number of parent records for the current asset record that you are viewing. If an asset has a parent asset association, the number of associations displays in the Parents field. An asset can have multiple parents. Double click in the Parents field to view the parent record information on the Maintain Asset Structures screen.
Children	The Children field displays the number of child records for the current asset record that you are viewing. An asset can have multiple children. Double click in the Children field to view the child record information on the Maintain Asset Structures screen.
C/A/P	The C/A/P field indicates if there is a comment C , attachment A or picture P attached to the selected inventory asset record.
Identifier	The asset identifier is a unique tracking number for the assigned inventory asset. For example, a barcode, tag number or property identification number.
Identifier Type	Displays the identifier type, (e.g. barcode, RFID, or PIN).
Current Identifier	Displays the tracking identifier assigned to the inventory asset when the historical record was current.
Unique Name	Displays the unique name assigned to the inventory asset. The Unique Name is a data set on items that is globally unique, unambiguous and robust enough to ensure that information is consistent through the life cycle of the asset and supports the multifaceted business applications and users.
Default Location	Specifies the default location for an inventory asset. For assets that are frequently borrowed from a Check-In-Out Point , the Default Location specifies the asset's location when it is not loaned out to a borrower.
Manufacturer	Displays the name of the manufacturer of the asset.
Model Number	Displays the model number assigned to the asset by the manufacturer.
Official Name	Displays your organization's official description for the asset by a particular manufacturer and model combination.
Model Name	Displays the model name assigned to the asset by the manufacturer.

Asset Summary and History Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
Serial Number	Displays the serial number assigned to the asset by the manufacturer.
Drawing Number	Displays the drawing number used to design and construct the asset. Generally used for architectural and construction project use.
Initial Event	Displays the asset initial event type. For example, <i>Purchase</i> , <i>Fabrication</i> or <i>Transfer</i> . An initial event is the asset's method of acquisition. Sunflower Assets enables you to establish the initial event types that best suit your organization. You can use the Administration module to define other Asset Initial Event Types for your organization by using the Maintain Asset Event Types screen, select the <i>Asset Initial Event Type</i> category, and then add the Asset Event Type .
User Fields	Displays user field information associated with the initial event.
Final Event	Displays the asset final event type. For example, <i>Excess Sale</i> or <i>Transfer</i> . A final event is the method for recording the retirement of an asset. Sunflower Assets enables you to capture each interest asset's final event. You can use the Management module to further define asset final events for your organization by using the Create Inventory Asset Final Events screen.
User Fields	Displays user field information associated with the final event.
Asset Value	Displays the value entered for the asset. Press the Edit icon to display the asset value component and summary detail. The field adjacent to Asset Value specifies if the asset is capitalized or not capitalized. You can capitalize an asset with the Finance module using the Capitalize Financial Assets screen.
Acquisition Date	Displays the date the asset was acquired.
Responsibility Date	Displays the date the organization became responsible for the asset.
Condition	Displays the current condition of the asset.
Effective Date	Displays the date the asset state becomes effective.
Expected Return Date	Displays the expected return date of an asset that has been loaned, stored, or sent out for repair.
Activity Status	Displays the current active status of an asset such as <i>In Service</i> or <i>Storage</i> .
Flags	Displays the flags assigned to an asset.
Activity Type	Displays the asset's activity type. For example, the asset may be used for various research projects. You can view the Activity Type field for the project that is currently using the asset. You can create activity types with the Administration module by using the Maintain Domains screen, select the <i>Activity Type</i> domain and modify or add a new activity type.
Managed By	Displays the organization that manages the asset. A Manager may be the child organization of an Owner in a parent-child hierarchical structure.
Owner	Displays the organization that owns the asset. An Owner is the highest level of authority in a parent-child hierarchical structure. It can be the parent of a Manager .
Steward	Displays the organization that is the steward of an asset. A Steward may be the child organization of a Manager in a parent-child hierarchical structure.

Asset Summary and History Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
Rep	Displays the name of the steward's primary asset center representative.
Custodian	Displays the asset's custodian. A custodian is the person in possession of and responsible for the control and care of an asset.
User	Displays the user of an asset. The person that is authorized to use an asset.
Location	Displays the asset's location.
Document	Displays the type of supporting documentation, documentation identifier, storage type and organization for an asset.
User Fields	Displays user field information associated with the Inventory Asset.
Global User Fields	Displays global user field information applicable to the Core Asset record.
Creator Information	Click to open the Creator Information display box to view the Transaction Creator Information . You can click the Next Record and Previous Record icons to view the different asset state transactions for an asset. The Transaction Creator Information captures the date and time, and the creator of each transaction.

EDIT INVENTORY ASSET RECORDS

In addition to using the **Maintain Inventory Assets** screen to create asset records, you can use the **Maintain Inventory Assets** screen to update an asset's property record.

Scenario: The following graphic illustrates how to modify a single asset record. In this example, inventory asset record **XX23** has an incorrect purchase account, **1234**, in the asset **Initial Event** context based **User Fields**. Use the **Maintain Inventory Assets** screen to update the purchase account with the correct account number, **RR123**, and enter a comment about the changes that made to the inventory asset record.

NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets

The screenshot shows the 'Maintain Inventory Assets' screen for asset identifier 'XX23'. The 'User Fields' field is highlighted with a red box, showing the value 'PO78_1_1234'. The screen displays various asset details including manufacturer (Ford Motor Company), model (Taurus), and acquisition date (01/01/1990).

Identifier	Type	Existing interest asset	Type	Identifier	Released?
XX23					Y

Inventory Assets

Unique Name: _____

Default Location*: _____

Catalog Identifier*: 6 Commodity Asset Parents: 0 Children: 0 C/P/A: _____

Manufacturer: FORD MOTOR COMPANY Model: TAURUS

Official Name: SEDAN Model Name: _____

Serial Number: GG123XX Drawing No.: _____

Initial Event: PURCHASE User Fields*: PO78_1_1234

Asset Value*: \$17,000.00 Acquisition Date: 01/01/1990 Responsibility Date: 01/01/1990

Asset Condition: _____ Effective Date: 05/23/2006 Expected Return Date: _____

Activity Status: IN SERVICE Flags*: _____ Activity Type: _____

Manager: SUNFLOWER SYSTEMS Owner: SUNFLOWER SYSTEMS

Steward: SUNFLOWER SYSTEMS Accepted?: Y Rep: _____

Custodian: 050167 Last Name*: FRAZIER First: TIMOTHY Mid: M

User: _____ Last Name*: _____ First: _____ Mid: _____

Location*: LIVERMORE_BUILDING_E_ROOM_200

Document*: _____

User Fields*: _____

Global User Fields*: _____

Page 2 Commodity Comment / Picture / Attachment Re-Request

Figure 1-11: Edit a Purchase Account

Step 1. Navigate to the **Maintain Inventory Assets** screen.

Step 2. Enter the asset identifier in the **Identifier** field.

In this case, the asset identifier is **XX23**. The existing information for the selected inventory asset record will populate the screen.

Step 3. Double-click in the **User Fields** field adjacent to the **Initial Event** field to open the **Asset Initial Event** extended field.

Step 4. Edit the **Purchase Account** number.

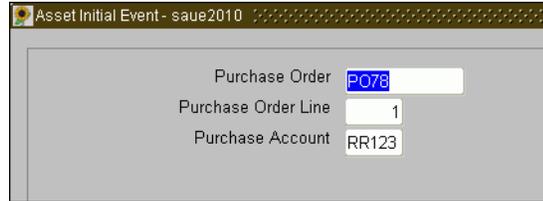


Figure 1-12: Using a User Defined Field to Edit the Purchase Account

Step 5. Save to update the **Purchase Account** information.

CHANGE INVENTORY ASSET INFORMATION

You can use the **Change Inventory Asset Information** screen to provide updates to multiple assets all at the same time. For more information on how to use this screen in this manner, see, “Transfer Assets Directly (Change Location)” on page 50.

EDIT COMMENTS, ATTACHMENTS AND PICTURES

The **Maintain Inventory Asset Comment/Picture** screen enables users with the ACR role to capture the condition of an inventory asset by attaching pictures, documents or comments associated with an inventory asset. This screen is provided from the main menu because the ACR does not have access to the **Maintain Inventory Assets** screen which is the alternative method for accessing the **Maintain Inventory Asset Comment/Picture** screen.

Scenario: The following graphic illustrates how to use the **Maintain Inventory Asset Comment/Picture** screen to add additional details for an inventory asset record by capturing comments, attaching pictures, and other related documents.

NAVIGATION

- Click Mgmt
- Click **Maintain Inventory Asset Comment/Picture**
- Click the **Asset Identifier**
- Click the **Tab** key

The screenshot shows a window titled "Maintain Inventory Asset Comment/Picture - usrm2070". It contains a table with the following data:

Assets	Manufacturer	Model	Official Name
Identifier: XX1234	APPLE	M5600	COMPUTER-PERSONAL

NAVIGATION

- Click the **Comments** tab

The screenshot shows a window titled "Capture Comments, Pictures and Attachments - saul0060". It displays the "INVENTORY ASSET XX1234" and has three tabs: "Comments", "Pictures", and "Attachments". The "Comments" tab is active, showing a "Comment Type" dropdown set to "COMMENT", a "New Comment" text area containing "Computer will now be used for the Line Project.", and a "Comment History" list with one entry: "ONE ADM ADMIN on 07/05/2006 09:41:37" with the text "New computer for the Expansion Project.".

Figure 1-13: Capturing Comments

- Step 1.** Navigate to the **Maintain Inventory Asset Comment/Picture** screen.
 - Step 2.** Enter the asset identifier in the **Identifier** field. In this case, the asset identifier is *XX1234*. The existing information for the selected inventory asset record will populate the screen.
 - Step 3.** Click the Tab key to open the **Comments** screen for the specified asset.
 - Step 4.** Select the type of comment you want to create from list of values. Your choices are *Comment* or *Text*.
 - Step 5.** Enter your comments for the selected inventory asset record in the **New Comment** text area.
 - Step 6.** Click the **Save** icon to save your updated comments.
- NOTE:** The **Comment History** area displays the user ID, the date and time of previous comments and the new comments (upon saving).

ADD PICTURES

Use the **Pictures** tab to add pictures related to a specified asset with the **Add Picture** button. If there is more than one picture attached to an asset, use the **Picture List** button to view the list of pictures associated to the asset. Use the **View Picture** button to view a picture in a separate web browser from which you can download or save the picture to a local directory.

Scenario: The following graphic illustrates how to use **Capture Comments, Picture and Attachments** screen to attach a picture to an inventory asset record.

NAVIGATION

- Click Mgmt
- Click Maintain Inventory Asset Comment/Picture
- Click the Asset Identifier
- Click the Tab key



NAVIGATION

- Click the Pictures tab

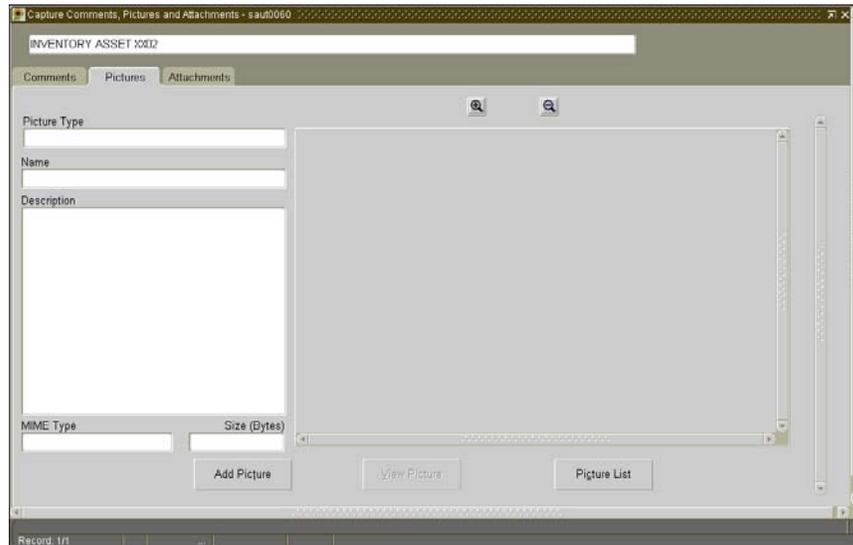


Figure 1-14: Add a Picture

- Step 1.** Navigate to the **Maintain Inventory Asset Comment/Picture** screen.
- Step 2.** Enter the asset identifier in the **Identifier** field. In this case, the asset identifier is **XX02**. The existing information for the selected inventory asset record will populate the screen.
- Step 3.** Click the Tab key to open the **Capture Comments, Pictures and Attachments** screen for the specified asset.
- Step 4.** Click the **Pictures** tab.
- Step 5.** Click the **Add Picture** button to open the **Picture Upload** screen.
- Step 6.** Navigate to the related asset picture file and choose the appropriate picture.
- Step 7.** Navigate to the **Maintain Inventory Asset Comment/Picture** screen.

NAVIGATION

- Click **Pictures** tab
- Click **Add Picture**

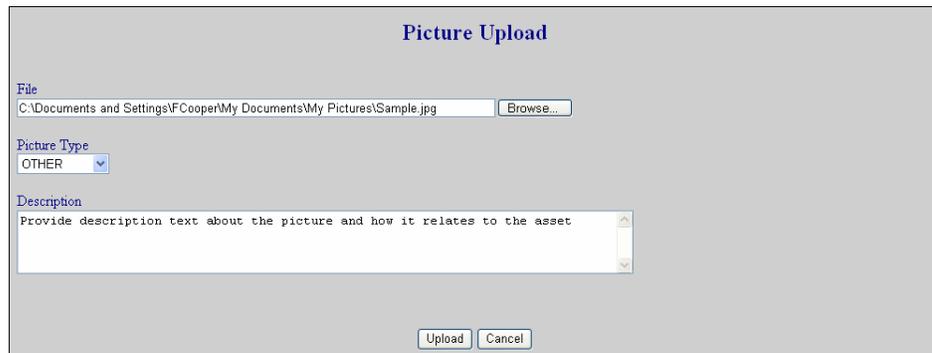


Figure 1-15: Picture Upload Dialog Box

- Step 8.** Click the **Browse** button to select a picture from a directory path where the picture resides.
- Step 9.** Select the type of picture that you want to upload in the **Picture Type** field.
- Step 10.** Use the **Description** field to provide descriptive text about the picture and how it relates to the asset.

Step 11. Click the **Upload** button. If successful, a web page pops up indicating that the file uploaded successfully. Close the web page to return to Sunflower Assets.

Step 12. Click the **OK** button to display the picture.

NAVIGATION

View the new picture

Add more pictures as required

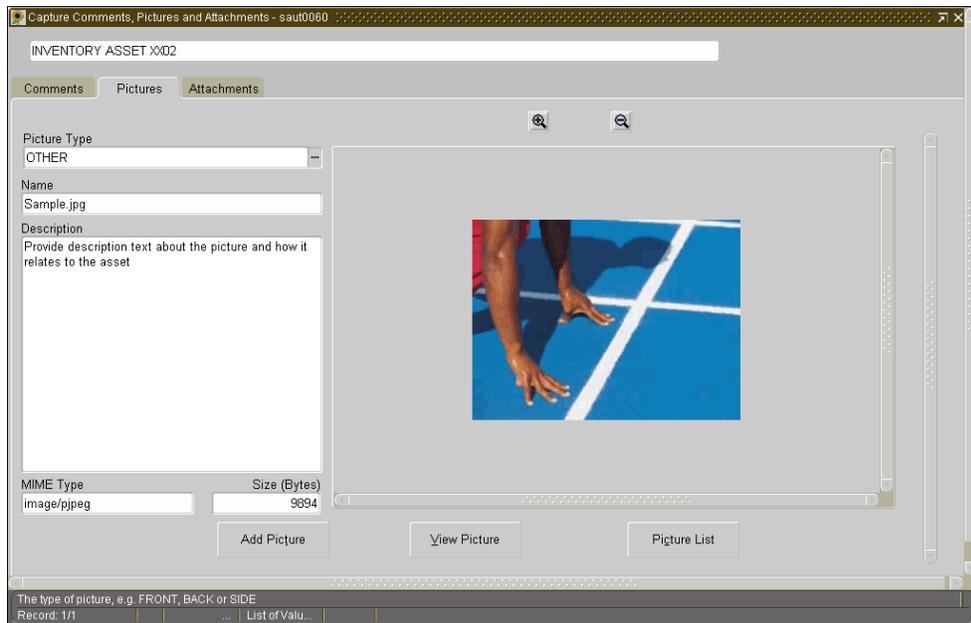


Figure 1-16: Saving the Uploaded Picture

Step 13. Click the **Save** icon to save your changes.

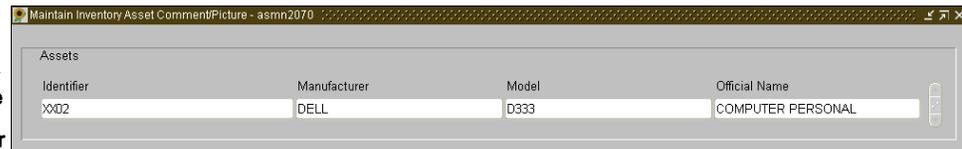
ADD ATTACHMENTS

Use the **Attachment** tab to add documents related to the specified asset with the **Add Attachment** button. If you have added more than one attachment to an asset record, you can use the **Attachment List** button to view the list of attachments associated to the asset.

Scenario: The following graphic illustrates how to upload an attachment to an inventory asset record.

NAVIGATION

- Click Mgmt
- Click Maintain Inventory Asset Comment/Picture
- Click the Asset Identifier
- Click the Tab key



NAVIGATION

- Click the Attachments tab

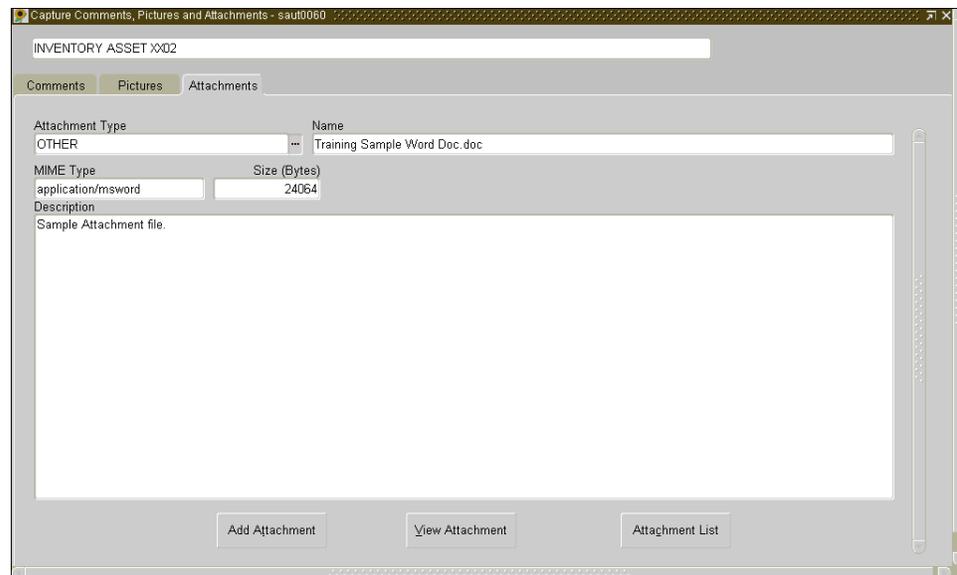


Figure 1-17: Add an Attachment

- Step 1.** Navigate to the **Maintain Inventory Asset Comment/Picture** screen.
- Step 2.** Enter the asset identifier in the **Identifier** field. In this case, the asset identifier is **XX02**. The existing information for the selected inventory asset record will populate the screen.
- Step 3.** Click the **Attachments** tab to open the **Attachment Upload** dialog box.
- Step 4.** Click the **Browse** button to select an attachment from its location on your local or shared directory.
- Step 5.** Use the **Attachment Type** field to select the type of attachment you are uploading.
- Step 6.** Use the **Description** field to provide descriptive text about the attachment and how it relates to the asset.
- Step 7.** Click the **Upload** button. If successful, a web page pops up indicating that the file uploaded successfully. Close the web page to return to Sunflower Assets. Close the web page to return to Sunflower Assets.
- Step 8.** Click the **OK** button to display the attachment.
- Step 9.** Click the **Save** icon to save your changes.

DOCUMENT SEARCH

Sunflower now provides the ability to search for attachments and documents that are associated with asset records and agreements. Not only can the document search feature enable you to search and retrieve documents but it can also let you search and retrieve comments, or document content for specific formats such as MS Word documents, MS Excel and Adobe PDF files. The Document Search feature searches all attachments in the Sunflower database. The search and retrieval process returns a scored list of relevant items from which you can select one or more desired items to view.

The search function is an Oracle text object that requires one extra table and 2 extra indexes. To enable the **Search Document** feature, use the sscripts provided on the installation CD to run and install the search component.

Scenario: The following graphic illustrates how to search the Sunflower database for documents and attachments.

NAVIGATION

- Click **Search Attachments and Comments**



Figure 1-18: Searching for Documents and Attachments

Step 1. From the Production page, click the **Search Attachments and Comments** link. The search page displays.

NOTE: The Search menu is similar to a Report or HTML transaction page.

NAVIGATION

- Click Search Attachments and Comments
- Click Select search parameters
- Click SEARCH

Sunflower Enterprise - Production 4.5.0.0

Powered By ORACLE

Repository Owner

Search for

In comments? In attachment description? In attachment content?

Attachment Types

All Types Clear Excel JPEG PDF Word

Search

Figure 1-19: Search Documents Feature Search Criteria Page

Step 2. Enter search parameters/

- Enter search terms in the **Search for** field or use the **%** wildcard to search for all documents and/or comments.
- Select one or more option in which to search for your key word(s)
 - In comments
 - In attachment description
 - In attachment content
- Select one or more **Attachment Types** that you want to retrieve if the keyword(s) have a match in the specified type. The list of choices depends on what is available in your database.
 - Excel document
 - Graphic file (JPEG, BMP, GIFs etc.)
 - PDF document
 - Word document

Step 3. Click the **SEARCH** button to return the results of the search criteria.

NAVIGATION

- Click **Search Attachments and Comments**
- Click **Select search parameters**
- Click **SEARCH**
- Click **Select to view**

Search for

In comments? In attachment description? In attachment content?

Attachment Types

Excel JPEG PDF Word

Search Results

Select?	Attachment Description Score	Attachment Content Score	Name	Type	Size	Description	Captured For
<input type="checkbox"/>	9	100	Sunflower Enterprise Products.xls	Excel	16896	Enter a description here...	AGREEMENT 50001022714

Figure 1-20: Document Search Results

Step 4. Check the select box and **OPEN** to view or simply click the document name link to view the details of the file.

NAVIGATION

- Click Search Attachments and Comments
- Click Select search parameters
- Click SEARCH
- Click Select box
- Click Open to view

	A	B	C	D	E	F	G	H
1	Sunflower Enterprise							
2		Sunflower Products						
3		Sunflower Assets	Sunflower Assets Express	Sunflower Contracts	Sunflower Sentry	Sunflower MobileTrak*	Sunflower ExcessTrak*	Sunflower PackTrak*
4	Agreements	X	X	X				
5	Management	X	X		X			
6	Inactive	X		X				
7	Finance	X						
8	Excess	X	X	X	X			
9	Review	X	X	X	X			
10	IT Components	X						
11	Administration	X	X	X	X			
12	Contracts			X				
13	Sentry				X			
14	MobileTrak					X		
15	ExcessTrak						X	
16	PackTrak							X
17	HTML Transaction Pages	X	X	X	X			
18	Stock Asset Management	X		X				
19								

Figure 1-21: Viewing a Document from the Sunflower Database

MAINTAIN ASSET STRUCTURES (PARENT/CHILD RELATIONSHIPS)

Most assets stand alone as individual assets; however, others may be grouped together for ease of processing and reporting. Parent/Child assets are items that you can group together. For example, a computer is really a number of different assets such as a Central Processing Unit (CPU), Monitor, Printer, Disk Array and so on.

When working with Parent/Child assets, all of the child assets have their own cost basis and their own depreciation attributes independent of the parent asset. You can specify that a new child asset of a parent component asset inherit the remaining life of the parent asset. For example, consider a vehicle that is being depreciated by using a five-year useful life span. After two years, a new communications package is added as a child asset to the vehicle (parent asset). You can depreciate the communications package over the remaining depreciable life of the vehicle, which is three years. If you choose this option, then the child asset takes on the remaining life of the parent component asset.

Alternatively, you could choose to use the depreciation schedule of the communications package, which may or may not extend beyond the depreciation life of the vehicle in which it has been installed. You may want to set up the depreciation life of the communications package to extend beyond the parent (vehicle) asset because you plan to remove the child asset (communications package) and install it in a new parent (vehicle) asset for further use until the child asset is no longer serviceable.

Scenario: The following graphic illustrates how to tell if an asset has an associated parent asset or children assets.

NAVIGATION

- Click Mgmt
- Click Inventory Asset Summary and History

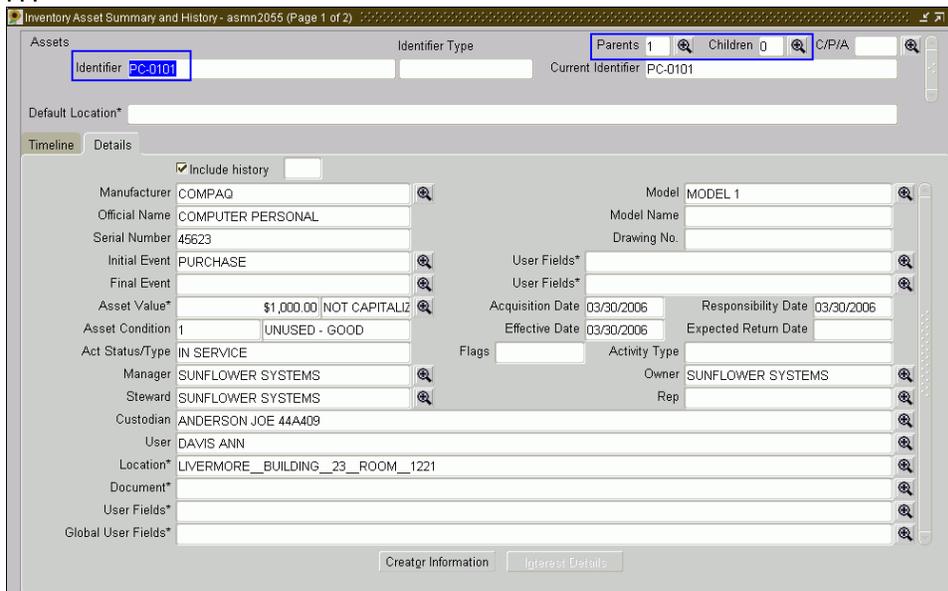


Figure 1-22: Parent Child Assets on the Asset Summary and History Screen

The **Parents** and **Children** fields display the number of parent and/or child records for the current asset record. An asset record can have multiple parents and children.

Double-click the **Parents** and **Children** field to view the respective information. Double-clicking on either field takes you to the **Maintain Asset Structures** screen where you can view the parent and child information for the selected asset record. The graphic on the previous page displays the history of an asset.

Scenario: The following graphic illustrates how to view the parent-child relationship for a specific asset record and drill down for additional details. The following graphic shows that the asset with an identifier of **PC-0101** is the parent of the Disk Array child asset with the Identifier of **DA-231**. The **Related Assets** block of the **Maintain Asset Structures** screen lists the asset details of the child asset.

NAVIGATION

- Click Mgmt
- Click Inventory Asset Summary and History
- Double-click Parent or Child field
- or...
- Click Mgmt
- Click Maintain Asset Structures

The screenshot shows the 'Maintain Asset Structures' window. The top section displays the 'Asset' details for the parent asset:

Type	Identifier	Manufacturer	Model	Official Name	P	C
INV	PC-0101	COMPAQ	PC5674	PERSONAL COMPUTER		Y

Below this, the 'Structure Type' is set to 'COMPONENT 01'. There are radio buttons for 'Display' with 'Parents' selected and 'Children' unselected.

The 'Related Assets' section shows a table of child assets:

Ok	Type	Identifier	Manufacturer	Model	Official Name	P	C
<input type="checkbox"/>	INV	DA-231	COMPAQ	DS8769	DISK ARRAY	Y	
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							
<input type="checkbox"/>							

Each row in the 'Related Assets' table has a 'User Fields*' section with multiple input fields. At the bottom of the screen, there are buttons for 'Children' and 'Parents', and a 'Message' field.

Figure 1-23: Maintain Asset Structures Screen

Use the **Display Parents** or **Children** radio button selections to display parent or child assets in the **Related Assets** block. The **Children** and **Parents** buttons at the bottom of the screen perform the same function.

VIEW PARENT CHILD ASSETS WITH THE ASSET STRUCTURE REPORT

The **Asset Structure** report shows parent/child relationships between assets. Use the **Asset Structure** report to review parent/child relationships between assets. To run a report perform the following:

Step 1. Select either **Mgmt > Management Reports** or **Reports > Management Reports**.

Step 2. Click the **Asset Structure** report.

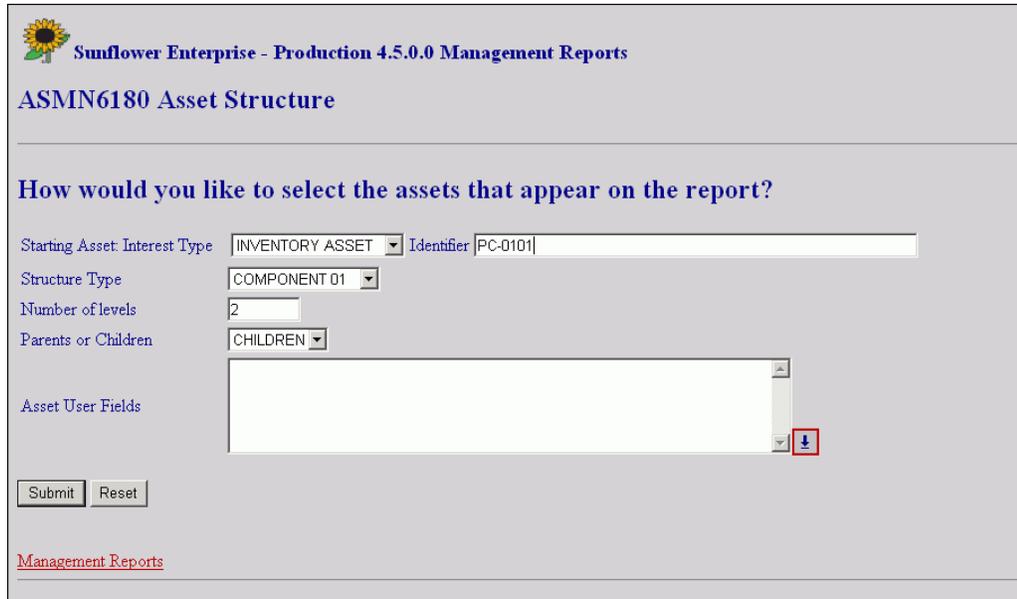
NAVIGATION

- Click Mgmt
- Click Management Reports
- or...
- Click Management Reports
- Click Asset Structure



Figure 1-24: Selecting the Asset Structure Report

Step 1. Enter the inventory asset ID in the **Identifier** field on the **Report Parameter** page.



Sunflower Enterprise - Production 4.5.0.0 Management Reports

ASMN6180 Asset Structure

How would you like to select the assets that appear on the report?

Starting Asset Interest Type: INVENTORY ASSET Identifier: PC-0101

Structure Type: COMPONENT 01

Number of levels: 2

Parents or Children: CHILDREN

Asset User Fields: [Empty text area]

Submit Reset

[Management Reports](#)

Figure 1-25: Asset Structure Report Parameters

ASSET STRUCTURE REPORT OUTPUT

Review the **Asset Structure** report output to review parent/child relationships between assets. The following report reveals the parent child relationship for the parent asset, *PC-0101*.

Sunflower Enterprise ASMN6180		Asset Structure				Page 2 of 3 07/19/2005 14:35	
Level	Identifier	Official Name	Manufacturer	Model	Location		Asset Value
0	INV PC-0101	COMPUTER PERSONAL	COMPAQ	MODEL 1	LIVERMORE BUILDING : 23 ROOM : 1221	\$	10,000.00
	User Fields :						
1	INV DA-231	DISK ARRAY	COMPAQ	DS8769	LIVERMORE BUILDING : 23 ROOM : 1221	\$	7,000.00
	User Fields :						
					Total :	2	\$ 17,000.00

Figure 1-26: Asset Structure Report

TRANSFER ASSETS

Many changes can occur over the course of an asset's lifecycle. The most common changes are those that affect the location, custodian, user and steward of the asset. There are several ways to manage property records based on the type of changes required. Sunflower provides several screens specifically designed to update these changes to perform mass changes to one or many assets.

The following examples illustrate how to:

- Change Location
- Change Location and Custodian
- Request a New Steward
- Accept Requested Steward Change
- Deny or Withdraw a Requested Change

TRANSFER ASSETS DIRECTLY (CHANGE LOCATION)

While you can change the location of a single record with the **Maintain Inventory Assets** screen, you can perform the same change for multiple asset records by using the **Change Inventory Asset Information** screen.

Scenario: The following graphic illustrates how to change the location of an asset from its current location to a new location. An asset’s custodian has changed offices and moved all of their assets to the new location, Room 102 in Building G at the Livermore site. Use the Change Inventory Asset Information screen to update the location of all assets assigned to the custodian.

NAVIGATION

- Click **Mgmt**
- Click **Change Inventory Asset Information**

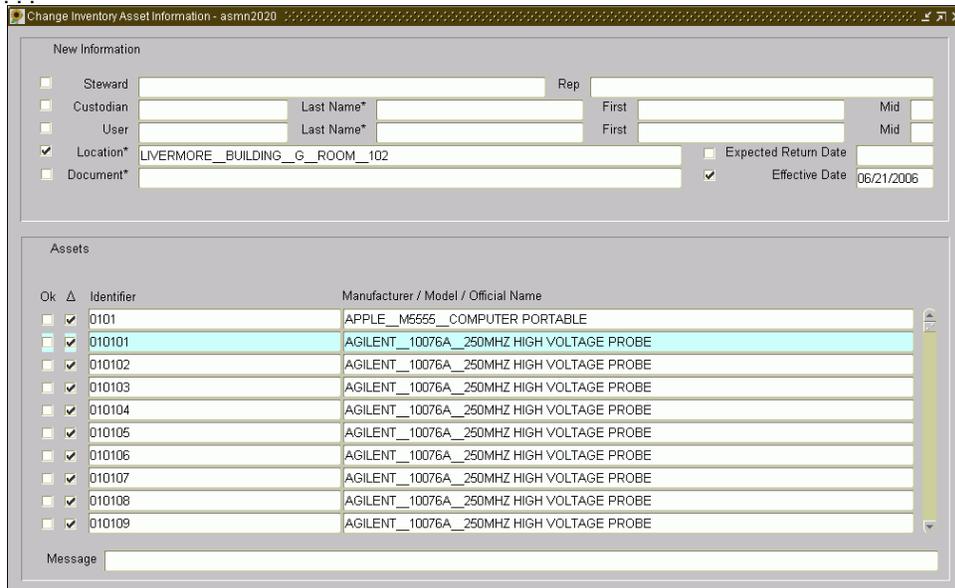


Figure 1-27: Transferring Multiple Asset Records to a New Location

Step 1. Navigate to the **Change Inventory Asset Information** screen.

Step 2. Select (check) the items that you want to apply changes for selected assets.

Step 3. Enter the new location information of the assets by double-clicking in the **Location** complex field in the **New Information** block.

You can perform similar changes for the **Cust Org** (Custodian Organization), **Custodian**, **User** and **Document** fields.

Step 4. To return only the assets assigned to a specific steward:

- Place the cursor in the **Identifier** field of the **Assets** block
- Click the **Find** icon to open the **Query Criteria** screen.
- Enter the **Steward's** name in the **Assigned To** field
- Click the **Execute** button to execute the query.

The query searches and retrieves from the database the assets assigned to the selected steward and displays them in the **Assets** block. You can now assign the new location to the desired assets assigned to the steward.

NOTE: You can deselect any assets that you do not want to apply changes to by unchecking the delta checkbox next to the inventory asset identifiers.

Step 5. Click the **Save** icon to save your changes to the selected assets.

CHANGE LOCATION AND CUSTODIAN

The previous example demonstrated how to change the location of an asset. While this is a common occurrence in the daily management of assets, you may need to change the location and the custodian for assets. You can use the **Change Inventory Asset Information** screen to make the changes to the custodian and location for these assets.

Scenario: The following graphic illustrates how to change the location and custodian at the same time for one or more assets.

NAVIGATION

- Click **Mgmt**
- Click **Change Inventory Asset Information**

Change Inventory Asset Information - asmn2020

New Information

Steward

Rep

Custodian 050167 Last Name* FRAZIER First TIMOTHY Mid M

User Last Name* First Mid

Location* SAN FRANCISCO_BUILDING_E2_ROOM_1808 Expected Return Date

Document* Effective Date 06/21/2006

Assets

Ok ▲	Identifier	Manufacturer / Model / Official Name
<input checked="" type="checkbox"/>	0101	APPLE_M5555_COMPUTER PORTABLE
<input checked="" type="checkbox"/>	010101	AGILENT_10076A_250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010102	AGILENT_10076A_250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010103	AGILENT_10076A_250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010104	AGILENT_10076A_250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010105	AGILENT_10076A_250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010106	AGILENT_10076A_250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010107	AGILENT_10076A_250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010108	AGILENT_10076A_250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010109	AGILENT_10076A_250MHZ HIGH VOLTAGE PROBE

Message

Figure 1-28: Assigning Asset Records to a New Location and Custodian

- Step 1.** Navigate to the **Change Inventory Asset Information** screen.
- Step 2.** Select (check) the items that you want to apply changes for selected assets. In this example, we are updating the **Custodian** to *Timothy Frazier* and the **Location** to *SAN FRANCISCO_BUILDING_E2_ROOM_1808* for assets *XX01*, *XX02* and *XX03*.
- Step 3.** In the **Assets** block, place the cursor in the **Identifier** field and enter one asset identifier per line.
- Step 4.** Click the **Save** icon to save your changes to the selected assets.

CREATE REQUEST (REQUEST NEW STEWARD)

In the previous examples, you were able to make updates to assets where you were a steward contact for one or more of the involved organizations. If you need to modify assets records for assets that do not belong to you or you need to transfer assets from your own steward organization to another, you will need to contact the steward of that organization and request that they make the updates or, in the case of a transfer, accept the transfer of assets from your organization to their organization.

Scenario: The following graphic illustrates how to request a transfer of an assigned asset to another steward organization. This is the first part of the two-part transfer process. The change in accountability is complete only after the requested party accepts the change/transfer request. You receive notice from the director of your organization that asset XX01 will be used for a project in another organization. Create a request to transfer the asset from your organization to the Sunflower Systems organization.

NAVIGATION

- Click Mgmt
- Click Request Inventory Asset Change

Ok	Δ	Identifier	Manufacturer / Model / Official Name
<input checked="" type="checkbox"/>		XX01	APPLE_M5555_COMPUTER PORTABLE
<input type="checkbox"/>			

Figure 1-29: Request Inventory Asset Change Screen

- Step 1.** Navigate to the **Request Inventory Asset Change** screen.
- Step 2.** Edit the items that you want to request a change for the selected assets. In this case, change of **Custodian** to *Sunflower Systems*.
- Step 3.** Enter the asset identifier of the asset you are requesting to be transferred and click the Tab key.
- Step 4.** Click the **Save** icon to save your transfer request. The system returns an asset request number. Take note of this value as you may use it in the future.

ACCEPT AN ASSET REQUEST (ACCEPT REQUESTED STEWARD CHANGE)

A change in accountability is a two-part process that is only complete when the requested party accepts the change/transfer request. The transfer of assets is a transfer of responsibility that takes place through a hand shake process known as a request and acceptance of an asset. If a request for transfer is made, the requested steward can either accept or deny the transfer of the assets in question. How do you know when you have pending asset transfers? There are several ways to discover pending requests awaiting action that include:

- E-mail: Automatic Notification
- “Inventory Assets with Requests Report” on page 56
- “Close Inventory Asset Requests” on page 59
 - “Deny Requests” on page 61
 - “Withdraw Requests” on page 62
 - “Accept Request and make additional changes” on page 64

One method shows you how to generate the **Inventory Assets with Requests** report to view assets that have pending requests for your steward organization. Another method shows you how to use the **Close Inventory Asset Request** screen to either accept or deny a requested asset transfer request for your organization.

INVENTORY ASSETS WITH REQUESTS REPORT

Use the **Inventory Assets with Requests** report to check for pending requests. To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Assets with Requests** report.

NAVIGATION

- Click Mgmt
- Click Management Reports
- or...
- Click Reports
- Click Management Reports
- Click Inventory Assets with Requests

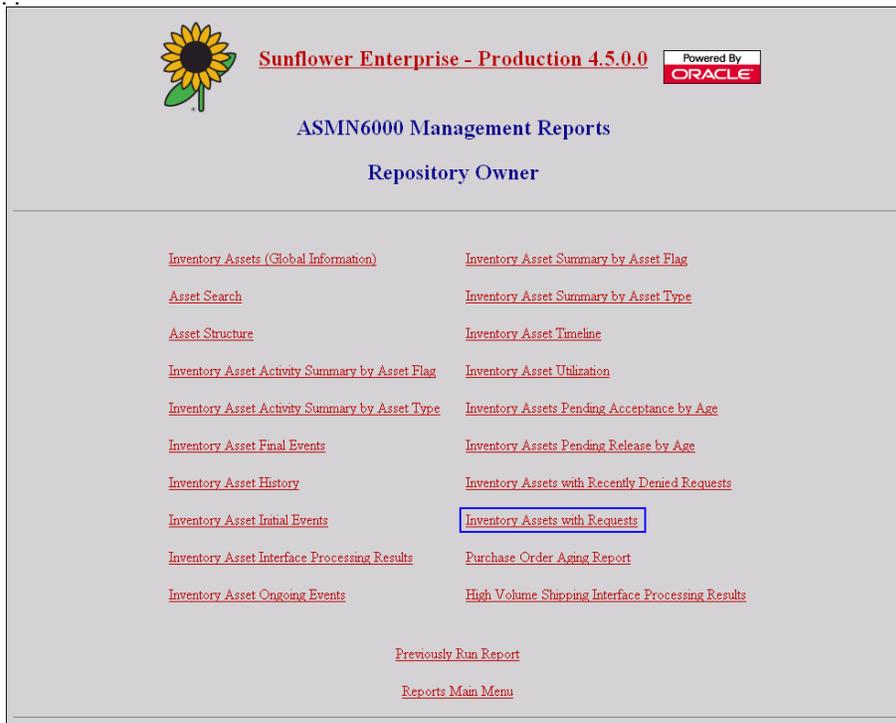


Figure 1-30: Inventory Assets with Requests Report

Select the Requested Steward for the Transfer. In this case, Asset Center XX.

 **Sunflower Enterprise - Production 4.5.0.0 Management Reports**

ASMN6040 Inventory Assets with Requests

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

Current Steward

Include the Steward's Child Organization

- OR -

Requested Steward

Include the Steward's child Organizations

- OR -

	Identifier	Last Name	First	Mid	Prefix	Suffix
Current Custodian	<input type="text"/>					
- OR -						
Requested Custodian	<input type="text"/>					
- OR -						
Current User	<input type="text"/>					
- OR -						
Requested User	<input type="text"/>					

Include Which of the Following?

Accept Inventory Asset Requests

Change Steward Requests

Change Custodian Requests

Change User Requests

Change Location Requests

How Would You Like the Assets to be Sorted?

1	2	3
<input type="text" value="CURRENT STEWARD"/>	<input type="text" value="CURRENT STEWARD"/>	<input type="text" value="CURRENT STEWARD"/>

[Management Reports](#)

Figure 1-31: Inventory Assets with Requests Report Parameters

INVENTORY ASSETS WITH REQUESTS REPORT OUTPUT

Review the **Inventory Assets with Requests Report** output to determine if there are any outstanding requests for asset transfers to your organization. The following report reveals several assets that have been requested to transfer to your organization.

Sunflower Enterprise		Inventory Assets With Requests				Page 3 of 5	
ASMN6040						07/19/2005 14:47	
Requested Steward : ASSET CENTER XX							
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Eff Date
XX09		COMPUTER PERSONAL	DELL	D833	21420394	\$ 5,500.00	08/17/1998
	Current Steward : SUNFLOWER SYSTEMS			Requested Steward : ASSET CENTER XX			- 08/17/1998
				Requester : OWNER REPOSITORY			
				Phone Number :			
	Current Custodian : FRAZIER KRISTEN S 020866			Requested Custodian :			
				Requester :			
				Phone Number :			
	Current User :			Requested User :			
				Requester :			
				Phone Number :			
	Current Location : LIVERMORE			Requested Location :			
		BUILDING : E ROOM : 200		Requester :			
				Phone Number :			
XX10		OSCILLOSCOPE	TEKTRONIX	T11209	2312133D	\$ 4,200.00	08/17/1998
	Current Steward : SUNFLOWER SYSTEMS			Requested Steward : ASSET CENTER XX			- 08/17/1998
				Requester : OWNER REPOSITORY			
				Phone Number :			
	Current Custodian : FRAZIER KRISTEN S 020866			Requested Custodian :			
				Requester :			
				Phone Number :			
	Current User :			Requested User :			
				Requester :			
				Phone Number :			

Figure 1-32: Inventory Assets with Requests Report Output

CLOSE INVENTORY ASSET REQUESTS

Use the **Close Inventory Asset Request** screen and the information provided by the **Inventory Assets with Requests** report to accept the requested asset transfer for your organization.

Scenario: The following graphic illustrates how to use the Close Inventory Asset Request screen to accept responsibility of the assets, XX08 and XX09.

NAVIGATION

- Click Mgmt
- Click Close Inventory Asset Requests

The screenshot shows a web application window titled "Close Inventory Asset Requests - asmn2040". The main content area is titled "Assets" and contains the following fields and controls:

- Identifier:
- Manufacturer / Model / Official Name*:
- Model Name:
- Serial Number:
- Drawing No.:
- Action Legend:
 - A - Accept
 - D - Deny
 - W - Withdraw
- Selection Controls:

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A	D	W
-------------------------------------	--------------------------	--------------------------	---	---	---
- Steward:
- Custodian:
- User:
- Location:
- Message:

Figure 1-33: Close Inventory Asset Request Screen Accept a Request

- Step 1.** Navigate to the **Close Inventory Asset Requests** screen.
- Step 2.** Click the **Find** icon to open **Query Criteria** screen.
- Step 3.** Select the **Requested** radio dial and enter your steward organization in the **Steward** field to search for assets that you have been requested to take ownership of.
- Step 4.** Select *Inventory* as the asset **Interest Type**.
- Step 5.** Click the **Execute** button to retrieve the search results from the database.
- Step 6.** Use the scroll bar or the **Next Record** icon to select the desired assets.
- Step 7.** Check the **A** (Accept) checkbox to accept the selected asset upon saving.
- Step 8.** Click the **Save** icon to save changes to the asset's property record.

NOTE: You can save after each decision or after making all inventory asset request decisions (Accept or Deny).

DENY REQUESTS

To refuse acceptance of an asset, select the **D** (Deny) checkbox. The requestor is notified accordingly.

Scenario: The following graphic illustrates how to deny the requests to transfer property records XX11 to your steward organization.

NAVIGATION

- Click Mgmt
- Click Close Inventory Asset Request

The screenshot shows a web application window titled "Close Inventory Asset Requests - asmn2040". The main content area is labeled "Assets" and contains a form with the following fields and options:

- Identifier:
- Manufacturer / Model / Official Name*:
- Model Name:
- Serial Number:
- Drawing No.:
- Legend:
 - A - Accept
 - D - Deny
 - W - Withdraw
- Action buttons: A, D (checked), W
- Steward:
- Custodian:
- User:
- Location:
- Message:

Figure 1-34: Close Inventory Asset Request Screen Deny a Request

- Step 1.** Navigate to the **Close Inventory Asset Requests** screen.
- Step 2.** Click the **Find** icon to open **Query Criteria** screen.
- Step 3.** Select the **Requested** radio dial and enter your steward organization in the **Steward** field to search for assets that you have been requested to take ownership of.
- Step 4.** Select **Inventory** as the asset **Interest Type**.
- Step 5.** Click the **Execute** button to retrieve the search results from the database.
- Step 6.** Check the **D** (Deny) checkbox to deny the selected asset upon saving.
- Step 7.** Click the **Save** icon to save changes to the asset's property record.

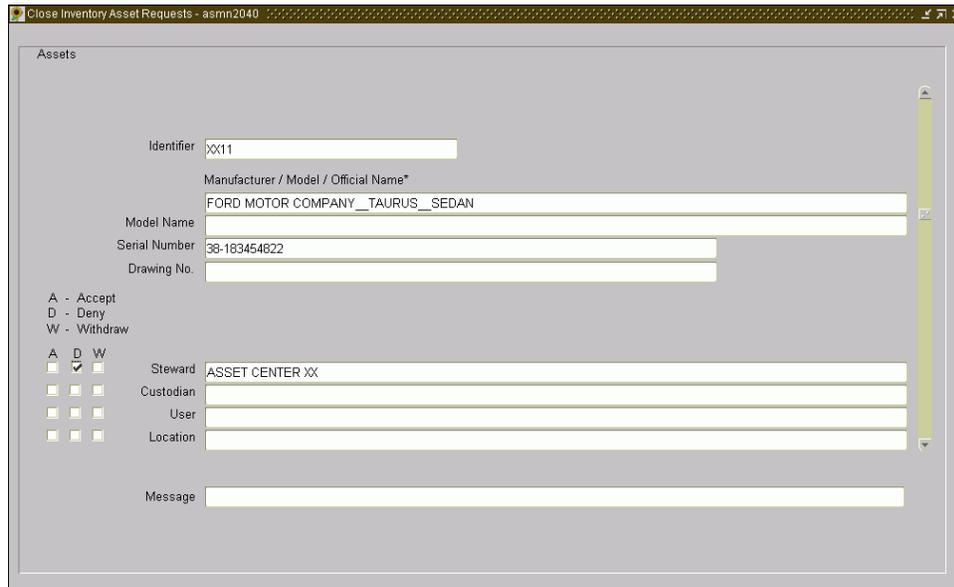
WITHDRAW REQUESTS

A requestor can withdraw their request to transfer an asset to another organization by selecting the **W** (Withdraw) check box. The requestor is notified accordingly.

Scenario: The following graphic illustrates how to withdraw a transfer request. The request you made for a new steward for asset XX07 was a mistake. Withdraw the request.

NAVIGATION

- Click Mgmt
- Click Close Inventory Asset Request



The screenshot shows a web application window titled "Close Inventory Asset Requests - asmn2040". The main content area is titled "Assets" and contains a form for managing an asset request. The form fields are as follows:

- Identifier: XX11
- Manufacturer / Model / Official Name*: FORD MOTOR COMPANY__TAURUS__SEDAN
- Model Name: [Empty]
- Serial Number: 38-183454822
- Drawing No.: [Empty]

Below the form fields, there are three columns of checkboxes for actions: A (Accept), D (Deny), and W (Withdraw). The W checkbox is checked. Below these are four rows of checkboxes for assigning roles: Steward (ASSET CENTER XX), Custodian, User, and Location. Each row has three checkboxes (A, D, W) and a text input field.

At the bottom of the form is a "Message" text input field.

Figure 1-35: Close Inventory Asset Request Screen Withdraw a Request

- Step 1.** Navigate to the **Close Inventory Asset Requests** screen.
- Step 2.** Click the **Find** icon to open **Query Criteria** screen.
- Step 3.** Select the **Assigned** radio dial and enter your steward organization in the **Steward** field to search for assets that you have requested to transfer ownership.
- Step 4.** Select *Inventory* as the asset **Interest Type**.
- Step 5.** Click the **Execute** button to retrieve the search results from the database.
- Step 6.** Use the scroll bar or the **Next Record** icon to select the desired assets.
- Step 7.** Check the *W* (Withdraw) checkbox to withdraw the asset request upon saving.
- Step 8.** Click the **Save** icon to save changes to the asset's property record.

ACCEPT REQUEST AND MAKE ADDITIONAL CHANGES

Once you have accepted assets into your custodial ownership, you can update the asset records with changes to the assignment of custodian, user, and location information. In a prior scenario you accepted assets into your organization, now you can update those records with additional information.

Scenario: The following graphic illustrates how to update asset records by assigning the new custodian and location details for the asset records.

NAVIGATION

- Click **Mgmt**
- Click **Change Inventory Asset Information**

Ok	Identifier	Manufacturer / Model / Official Name
<input checked="" type="checkbox"/>	0101	APPLE_M5555_COMPUTER PORTABLE
<input checked="" type="checkbox"/>	010101	AGILENT__10076A__250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010102	AGILENT__10076A__250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010103	AGILENT__10076A__250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010104	AGILENT__10076A__250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010105	AGILENT__10076A__250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010106	AGILENT__10076A__250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010107	AGILENT__10076A__250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010108	AGILENT__10076A__250MHZ HIGH VOLTAGE PROBE
<input checked="" type="checkbox"/>	010109	AGILENT__10076A__250MHZ HIGH VOLTAGE PROBE

Figure 1-36: Change Inventory Asset Information Screen

- Step 1.** Navigate to the **Close Inventory Asset Requests** screen.
- Step 2.** Enter the information that you are changing for the selected assets in the **New Information** block.
- Step 3.** In the **Assets** block, place the cursor in the **Identifier** field and enter one asset identifier per line. Click the Tab key after you enter each asset identifier.
- Step 4.** Click the **Save** icon to save your changes to the asset's property records.

TRANSFER INVENTORY ASSET VALUE

The **Transfer Asset Value** screen provides the ability to transfer values of any interest asset to another asset of the same interest type. Use the **Transfer Inventory Asset Value** screen to transfer the inventory asset value from one asset to another inventory asset.

Scenario: The following graphic illustrates how to transfer asset value from one inventory asset to another. In this example, the inventory asset, 0102, value is transferred to the inventory asset 0101.

NAVIGATION

- Click **Mgmt**
- Click **Transfer Inventory Asset Value**

The screenshot shows a web application window titled "Transfer Inventory Asset Value - asrm2190 (Page 1 of 2)". The main content area is divided into two sections: "To" and "From".

To Block:

Identifier	0101		
Manufacturer	APPLE	M5555	COMPUTER PORTABLE
Asset Type	ADPE AUTOMATED DATA PROCESSING EQUIPMENT		
Acquisition Date	01/01/1995		Flags S
Activity Status	IN SERVICE	Activity Type	
Document*			
User Fields*			
Global User Fields*			

From Block:

	Asset Value	Total Transfer Value*
Identifier	0102	\$3,400.00
Manufacturer	DELL	D333
		COMPUTER PERSONAL

At the bottom of the form, there are two buttons: "Page 2" and "Comment".

Figure 1-37: Transfer Inventory Asset Value to Another Asset

- Step 1.** Navigate to the **Transfer Inventory Asset Value** screen.
- Step 2.** Enter the identifier that you want to transfer value to in the in the **Identifier** field of the **To** block.
- Step 3.** Enter the identifier that you want to transfer value from in the in the **Identifier** field of the **From** block.
- Step 4.** Click the **Comment** button to enter any comments relevant to this inventory asset value transfer transaction.
- Step 5.** Click the **Save** icon to complete the transfer of value to the selected inventory asset.

MAINTAIN INVENTORY ASSET ONGOING EVENTS

Sunflower uses the concept of **Ongoing Events** to support the various activities that occur during an asset's lifecycle. For example, an asset may require periodic diagnostic testing to validate whether the asset is in proper working order or if the asset requires maintenance. You can use the **Maintain Inventory Ongoing Events** screen to record each instance that a designated asset receives diagnostic testing and if necessary, send out and record the maintenance of the asset. This provides you with an accurate history of your assets and their maintenance records.

Scenario: The following graphic illustrates how to use the **Maintain Inventory Asset Ongoing Events** screen to specify the receipt of the returned asset and certify the condition of the asset that will be transferred back into your organization.

NAVIGATION

- Click Mgmt
- Click Maintain Inventory Asset Ongoing Events

Ok	Datetime	Event Details*	C/A/P
<input checked="" type="checkbox"/>	07/19/2005 14:57:01	12000 _06/30/2005	
<input type="checkbox"/>			

Created by: NINE ADM ADM09
 Message: Complete
 Comment / Attachment / Pict...

Figure 1-38: Maintain Inventory Asset Ongoing Events Screen

Step 1. Navigate to the **Maintain Inventory Assets Ongoing Events** screen.

Step 2. Enter an asset identifier in the **Identifier** field. In this case, the asset identifier is *0111*.

NOTE: After entering a value in a field, hit the Tab key to move to the next field. Sunflower automatically populates default values when defaults are available.

Step 3. Select the ongoing event from the LOV in the **Ongoing Event Type** field. In this example, it is *Vehicle Mileage*.

Step 4. Click the **Comment/Attachment/Pict...** button to enter any comments relevant to this asset and its ongoing event.

Step 5. Click the **Save** icon to save your changes to the asset's property records.

MAINTAIN INVENTORY ASSET USER FIELDS

The **Maintain Inventory Assets User Fields** screen enables the ACR role to set the user-defined fields for an inventory asset. Alternatively, the Inventory Manager and Inventory Clerk roles can designate the asset user defined field value by using the **Maintain Inventory Assets** screen. A user with the ACR role does not have access to the **Maintain Inventory Assets** screen and as a result, must use this screen to perform this function.

Scenario: The following graphic illustrates how to set a user defined field value for an inventory asset. In this example, the inventory asset, 0101, user defined field is being set to 25 pounds.

NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets User Fields

Identifier	Manufacturer	Model	Official Name
0101	APPLE	M5555	COMPUTER PORTABLE

User Fields* 25
Message

User Fields*
Message

User Fields*
Message

User Fields*
Message

User Fields*
Message

Figure 1-39: Maintain Inventory Assets User Fields Screen

Step 1. Navigate to the **Maintain Inventory Assets User Fields** screen.

Step 2. Enter the asset identifier in the **Identifier** field and press the Tab key to display the asset's information.

NOTE: To find a particular asset or to find a group of assets, click the **Find** icon to display the **Query Criteria** screen. Enter the information you know (steward, location, user, etc.). Be sure to select the **Requested** check box near the top of the screen. Click the **Execute** button at the bottom of the screen.

Sunflower finds all the assets that match your criteria. The bottom of the screen indicates the number of records found matching your criteria. To move between multiple records, use the up and down arrow keys, or click the **Previous Record** and **Next Record** icons in the toolbar.

If you do not want to change for a particular asset, deselect the check box next to the asset.

Step 3. Place the cursor in the **User Fields** field and click the **Edit** icon to display the pop-up window.

Step 4. Enter the appropriate information for the user field.

Step 5. Click the **Save** icon to save the user field updates and return to the **Maintain Inventory Asset User Fields** screen.

INACTIVATE INVENTORY ASSETS

When assets are not in active use, you may choose to store them. Sunflower helps you to manage assets that are not in use through the Inactive module. The Inactive module provides a way to collect and track assets that are not in use. People can be made aware of the stored assets, which may be available for reuse by others for a predefined period-of-time while the owning organization is not using their assets.

The Inactive module provides an effective way to manage storage facilities. For example, there are many cases when assets are ordered for pending projects and the owning organization is not yet ready to utilize the asset. This asset may require special storage that can be better handled by a warehouse facility that manages the receipt and storage of assets. Alternatively, an asset could be used and in good condition but your organization has no further use for the asset. By sending the asset to an inactive storage facility, you give your entire enterprise the opportunity to search for assets that may be put back into service. Instead of purchasing a brand new asset, the asset can be reused, reducing the costs of purchases for an asset supporting the goals of your entire enterprise. Lastly, there are certain assets that require very specific storage conditions; the Inactive module enables you to specify unique requirements related to your assets so that your assets are stored in the proper condition.

Creation of an inactive asset is a two-part process performed by an individual in the owning organization (e.g. Inventory Clerk) and an Inactive Clerk. The Inventory Clerk initiates the request to store an asset by creating an inactive receival request. The request is received by the Inactive Manager who can then approve the request by creating what is known as an inactive asset from the inactive receival request. From here, the inactive manager will coordinate the appropriate personnel to pickup (if required) and store the requested assets.

Sunflower provides the Inactive module to handle inactive assets requests for agreement assets and inventory assets. This section will cover inactive asset process for an inventory asset. The discussion provided here is also applicable to agreement assets. To learn more about storing inventory assets by using the Inactive module refer to the following sections:

- “Send an Asset to Storage” on page 71
- “Withdraw Inactive Receival Request” on page 74
- “Request Inactive Asset Redeployment” on page 78
- “Withdraw Inactive Redeployment Requests” on page 80

NOTE: Inactive assets can be created directly for assets that are purchased and placed in controlled storage until they are ready to be issued. For example, stockroom assets are stored and issued to individuals as needed. A supply of these assets are kept in a controlled area and depending on the nature of the asset they may be identifiable assets (e.g. handguns, bullet proof vests) or they may be non-identifiable assets such as uniforms, or other standard issued items that are not expected to be returned but rather consumed. These types of assets would most likely be created initially as inactive assets.

SEND AN ASSET TO STORAGE

There are times when you may want to store an asset for later use. The asset may be a new asset that has been purchased and designated for a project that is not yet ready to utilize the asset. This asset may require special storage that can be better handled by an organization that oversees controlled property storage. Alternatively, an asset could be used and in good condition but your organization has no further use for the asset. By sending the used asset to an inactive storage facility, you give your entire enterprise the opportunity to search for and request that the inactive asset be transferred to their organization and put to use for another project that supports the goals of your entire enterprise. To assure that the assets have proper storage and can be made available when needed, you can request that the assets be placed in an inactive mode and stored under the proper conditions.

Sunflower provides the Inactive module to handle inactive assets requests for Agreement Assets, Inventory Assets, Financial Assets and Excess Assets. This section covers the inactive asset request process.

INVENTORY ASSET INACTIVE RECEIVAL REQUEST

The first part of creating an inactive asset is the creation of an inactive receival request. The Inactive Asset chapter shows you the second part of how to create an inactive asset by creating the inactive asset from an inactive receival request similar to the one we are going to create here.

Scenario: The following graphic illustrates how to create an inactive receival request. Asset XX04 will not be needed by your organization for at least the next 6 months. As a result you have decided to store it in the warehouse. Any charges required to collect and ship to the warehouse should be billed to account A11201. In addition, the asset should be kept dry and may not be used by other interested individuals.

NAVIGATION

- Click Inactive
- Click Request Inactive Receival
- Click Request Inventory Asset Inactive Receival

Figure 1-40: The Request Inventory Asset Inactive Receival Screen

- Step 1.** Navigate to the **Request Inventory Asset Inactive Receival** screen.
- Step 2.** Enter the inactive request pickup and deliver-to locations.
- You have the option of making the inventory asset inactive without moving the asset to a storage facility by selecting the **Make inactive in-place?** checkbox. This checkbox also overrides the **Pick-up Location** and **Deliver-to Location** fields.
 - In some cases, it may be more practical for you to store the inactive asset in a designated area that your organization can control according to the asset's requirements. Use the inactive in-place option to accommodate this type of business practice.
- Step 3.** Enter the asset identifier in the **Identifier** field for the item you are requesting an inactive receival. In this case, the asset identifier is *XX04*. The **Manufacturer**, **Model**, and **Official Name** fields auto-populate.
- NOTE:** The **Request No** (Number) is auto-generated upon saving. This number is used for tracking and reporting, and if necessary to withdraw the request.
- Step 4.** Use the **Inactive Type** field to select the type of storage required for the asset. In this example, it is the default value, *CONTROLLED STORAGE*. You can specify detailed storage instructions with the **Unique Requirements** text box below.
- Step 5.** Specify whether the asset is available for loan (*Y* for Yes or *N* for No) to others during its inactive period.
- Step 6.** Enter the duration of the asset's inactive period in the **Duration (yrs)** field. The length of the inactive period is designated in years (e.g, 0.5 = 1/2 year).
- Step 7.** Enter the account to charge storage and related costs for the inactivating the asset in the **Recharge Identifier** field.
- Step 8.** Specify any special considerations for the handling and storage of the asset (e.g. hazard, special storage needs, etc.) in the **Unique Rqmts** text box.
- Step 9.** Specify any general comments (e.g. pick up times, etc.) in the **Comment** text box.
- Step 10.** Click the **Save** icon to save your request. Notice the system generated request number. In this case, it is *1103*. This number will be used to complete the inventory asset inactive receival request later.

WITHDRAW INACTIVE RECEIVAL REQUEST

Use the **Withdraw Inactive Receival Request** screen to withdraw a prior request to inactivate an asset. You will need the **Request No** (**1103** from our last example) that you obtain upon saving your **Inventory Asset Inactive Receival** request in order to perform this action.

Scenario: The following graphic illustrates how to withdraw an Inactive Receival request.

NAVIGATION

- Click **Inactive**
- Click **Withdraw Inactive Receival**

Request No	Identifier	Manufacturer	Model	Official Name
1103	INV XX04	GATEWAY	SOLO 9100	COMPUTER PORTABLE

Inactive Type: CONTROLLED STORAGE

Available to others?: N Duration (yrs): Recharge Identifier: A11201

Pick-up Location: LIVERMORE__BUILDING__G__ROOM__200

Deliver-to Location: LIVERMORE__BUILDING__INACTIVE__ROOM__RCV

User: NINE ADM ADM09

Unique Requirements: KEEP DRY AT ALL TIMES

Comment: May be loaned out during the inactive period.

Message:

Figure 1-41: The Withdraw Inactive Receival Request Screen

- Step 1.** Navigate to the **Withdraw Inactive Receival Request** screen.
- Step 2.** Enter the inactive request number that you generated when you made the original request to inactivate the asset in the **Request No** field. In this case, it is request number **1103**. Click the Tab key to bring up the asset information.
- Step 3.** Click the **Save** icon to withdraw your inactive receival request.

DENIED INVENTORY ASSET INACTIVE RECEIVAL REQUEST

You can determine if your inventory inactive receival request has been denied by running the **Inventory Assets with Recently Denied Requests** report. Use this report to review denied inactive receival requests based on selected report criteria.

Scenario: The following graphic illustrates how to retrieve and review the report displaying a denied inactive receival request to store property record *XX04*, a portable computer.

Use the **Inventory Assets with Recently Denied Requests** report to check for denied requests. To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Assets with Recently Denied Requests** report.

NAVIGATION

- Click Mgmt
- Click Management Reports
- or...
- Click Reports
- Click Management Reports
- Click **Inventory Assets with Recently Denied Requests**

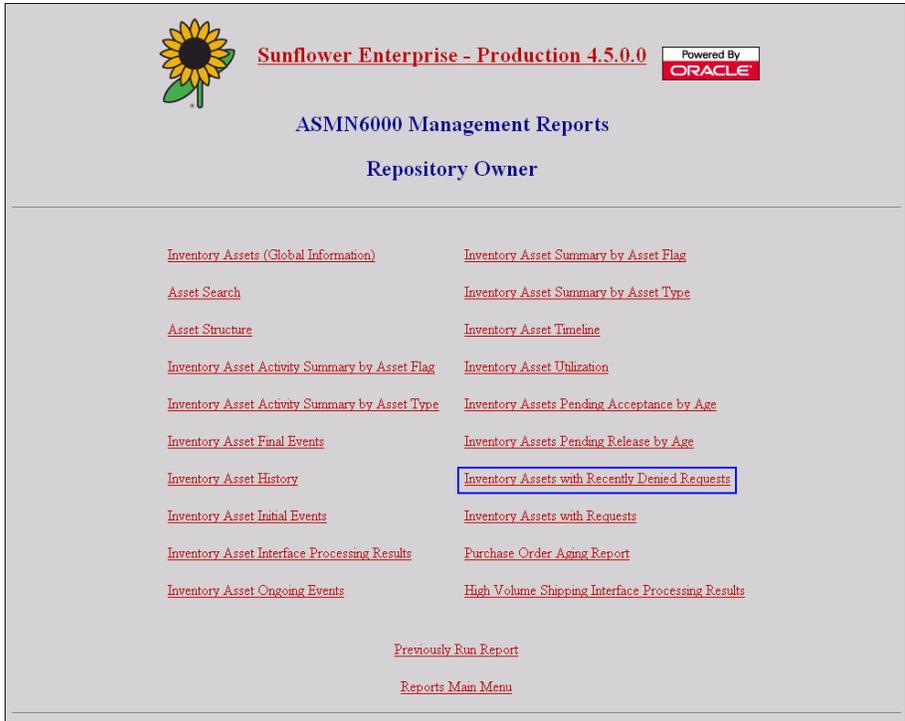


Figure 1-42: Inventory Assets with Recently Denied Requests Report

Enter the report parameters. In this case, designate the current user ID, *ADM09*.

Sunflower Enterprise - Production 4.5.0.0 Management Reports

ASMN6050 Inventory Assets with Recently Denied Requests

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

CURRENT Steward

Include the Steward's child Organizations

- OR -

Identifier	Last Name	First	Mid	Prefix	Suffix
CURRENT Custodian	<input type="text"/>				
- OR -					
CURRENT User	ADM09	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Request category?

Denial DATE

Include ONLY Assets WITH a Request Denied BETWEEN (MM/DD/YYYY) AND (MM/DD/YYYY)

Include All Denied Requests

[Management Reports](#)

Figure 1-43: Report Parameters

INVENTORY ASSETS WITH RECENTLY DENIED REQUESTS REPORT OUTPUT

Review the Inventory Assets with Recently Denied Requests report output to determine if there are any outstanding denied requests for asset transfers from your organization. The following report reveals several assets that have been denied requests to transfer from your organization.

Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Eff Date
XX04	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	WWW92EW	\$ 5,400.00	08/01/1997
		Current Steward : ASSET CENTER XX		Current Location : LIVERMORE			
		Current Custodian : XX CUSTODIAN CUSTXX		BUILDING : F ROOM : 100			
		Current User :					
		Request: INACTIVE RECEIVAL to :		Denied by: NINE ADM ADM09		on : 07/18/2005	
				Requester: NINE ADM ADM09			
				Phone Number :			
XX31		OSCILLOSCOPE	TEKTRONIX	T11209	XX	\$ 4,750.00	01/01/1990
		Current Steward : SUNFLOWER SYSTEMS		Current Location : LIVERMORE			
		Current Custodian : FRAZIER TIMOTHY M 050167		BUILDING : E ROOM : 220			
		Current User :					
		Request: EXCESS RECEIVAL to :		Denied by: NINE ADM ADM09		on : 07/18/2005	
				Requester: OWNER REPOSITORY			
				Phone Number :			
				Total :		2 \$ 10,150.00	
				Report Total :		2 \$ 10,150.00	

Figure 1-44: Inventory Assets with Recently Denied Requests Report

After determining the inventory assets whose requests have been denied, navigate back to the **Maintain Inventory Assets** screen and click the **Re-Request** button to resubmit a request for the selected inventory asset. Alternatively, you can re-instate the asset or withdraw your request if you decide that you no longer want to transfer the asset.

RE-DEPLOY INACTIVE ASSETS

You can send a request for redeployment to the organization storing your inactive assets when you want to make an asset available for use during its inactive period or when you want to redeploy an inactive asset to active status. After receiving your redeployment request, the controlled property storage organization can place the asset back in service. This section shows you how to redeploy an inactive inventory asset using the **Request Inactive Asset Redeployment** screen.

REQUEST INACTIVE ASSET REDEPLOYMENT

You want Inactive asset *IXX01* to be placed back into service and delivered to your office.

Scenario: The following graphic illustrates how to request that an inactive asset be redeployed.

NAVIGATION

- Click **Inactive**
- Click **Request Inactive Asset Redeployment**

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	IXX01	STEELCASE	DESK 6 FT	DESK 6 FT

Request No: 1103

Comment:

Message: Complete

Figure 1-45: The Request Inactive Asset Redeployment Screen

- Step 1.** Navigate to the **Request Inactive Asset Redeployment** screen.
- Step 2.** Specify the address for delivery of the asset that you want to redeploy by double-clicking in the **Location** field and entering the relevant information.
- Step 3.** Enter the asset identifier of the inactive asset that you want to redeploy in the **Identifier** field. Click the Tab key to populate **Manufacturer**, **Model**, and **Official Name**.
- Step 4.** Use the **Comment** text box to specify any special circumstances or delivery considerations.
- Step 5.** Click the **Save** icon to save your redeployment request. The system generates a redeployment **Request No** (Number).

WITHDRAW INACTIVE REDEPLOYMENT REQUESTS

If you have made a request to redeploy an asset and that asset cannot be placed back into service, you can withdraw your redeployment request.

Scenario: The following graphic illustrates how to use the **Withdraw Inactive Redeployment Request** screen to withdraw a request to re-use an inactive asset. Withdraw a redeployment request for asset IXX01. Use the request number (1161) from your original redeployment request.

NAVIGATION

- Click **Inactive**
- Click **Withdraw Inactive Redeployment Request**

Ok Request No	Identifier	Manufacturer	Model	Official Name
1103	INA IXX01	STEELCASE	DESK 6 FT	DESK 6 FT

Deliver-to Location: LIVERMORE_BUILDING_E_ROOM_XX

Comment: [Empty text area]

Message: [Empty text area]

Figure 1-46: The Withdraw Inactive Redeployment Request Screen

- Step 1.** Navigate to the **Withdraw Inactive Redeployment Request** screen.
- Step 2.** Enter the request number (**1161**) from the original inactive asset redeployment request.
- Step 3.** Click the Tab key to populate the screen.
- Step 4.** Click the **Save** icon to withdraw your request.

EXCESS INVENTORY ASSETS

When an asset reaches the end of its active life and is no longer useful, create an excess receival request to dispose of that asset. Sunflower calls the process of removing an asset from your organization's physical and financial accountability **excess**. Proper and efficient disposal of excess material is an important and sensitive matter that can be subject to government regulations. The excess process includes the creation of **excess receival request** to transition the active asset into an excess asset. The appropriate party or organization responsible for receiving, reviewing and acting upon requests can either deny, accept or withdraw a request. If accepted, the asset in question becomes an **excess asset**.

Once an asset is in excess, it may go through one or more **excess review cycles** depending upon the condition, type and other factors specified by your organization that will indicate the prioritization, duration and organizations to which the asset is available for review. The review cycle enables organizations to search for excess assets and if desired, redeploy these assets into their organization for reuse. The redeployment of excess assets is performed by creating an **excess asset reservation**. This process can remove the assets from the excess process and transition it back to an active status for the requesting organization. If an excess asset is not redeployed after a predetermined period of time (specified by your organization), the asset can be **retired**. While the excess process is not specific to inventory assets, the discussion provided in this section addresses the excess process and highlights the nuances of excessing inventory assets.

Excess receival requests enable users who do not have the authority to directly create an excess asset to request an asset for disposal.

This section discusses how to:

- “Request Inventory Asset Excess Receival” on page 82
- “Withdraw Inventory Asset Excess Receival” on page 84
- “Manage Denied Inventory Asset Excess Receival” on page 85
- “Utilize Excess Assets” on page 88
- “Create Excess Asset Reservations” on page 94

For information on the retirement process see “Retire Inventory Assets” on page 96.

REQUEST INVENTORY ASSET EXCESS RECEIVAL

Recall that users can only work with assets that are a part of the organizations to which they belong to or that they are authorized to work with. A user with the proper role (e.g. inventory clerk, inventory manager,) can create an excess receival request and a manager that oversees the disposal of assets for your organization can generate the excess assets from the receival request. After creating the request, the system can generate an E-mail to notify the requestor and other interested parties.

NOTE: Excess managers cannot create excess receival requests.

Scenario: The following graphic illustrates how to create an excess asset receival request for inventory assets. The Excess chapter will show you how to dispose of this asset. A request is created to excess asset XX03, a portable computer that is used but in good condition. The asset should be picked up from its current location (SAN_FRANCISCO_BUILDING_E2_ROOM_1808) and sent to excess (LIVERMORE_BUILDING_EXCESS_ROOM_RC).

NAVIGATION

- Click **Excess**
- Click **Request Excess Receival**
- Click **Request Inventory Asset Excess Receival**

The screenshot shows a web-based form for creating an excess receival request. The form is titled "Request Inventory Asset Excess Receival - asex2120".

Request Information

- Excess in-place?
- Pick-up Location * SAN FRANCISCO_BUILDING_E2_ROOM_1808
- Deliver-to Location * LIVERMORE_BUILDING_EXCESS_ROOM_RC

Assets

Ok	△	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	XX03	GATEWAY	SOLO 9100	COMPUTER PORTABLE

Request No 1104

Asset Condition 4 USED - GOOD

Comment

Message Complete

Figure 1-47: The Request Inventory Asset Excess Receival

- Step 1.** Navigate to the **Request Inventory Asset Excess Receipt** screen.
- Step 2.** Select the **Excess in-place?** checkbox if you want the asset to remain in its current location but in the Excess state. Selecting this option overrides the **Pick-up Location** and **Deliver-to Location** required fields.
- Step 3.** Specify the **Pick-up Location** of the asset that you want to excess by double-clicking in the **Location** field and entering the relevant information.
- Step 4.** Specify the **Deliver-to Location** of the asset that you want to excess by double-clicking in the **Location** field and entering the relevant information.
- Step 5.** Enter the asset identifier of the inventory asset that you want to excess in the **Identifier** field. Click the Tab key to populate **Manufacturer**, **Model**, and **Official Name**.
- Step 6.** Select the asset condition that best describes the asset's current state.
- Step 7.** Use the **Comment** text box to specify any special circumstances or delivery considerations.
- Step 8.** Click the **Save** icon to save your redeployment request. The system generates a redeployment **Request No** (Number).

WITHDRAW INVENTORY ASSET EXCESS RECEIVAL

If you have made a request to excess an asset and that asset can be placed back into service, you can withdraw your excess request.

Scenario: The following graphic illustrates how to use the **Withdraw Excess Receival Request** screen to withdraw a request to excess an inventory asset. Withdraw an excess receival request for the inventory asset XX31.

NAVIGATION

- Click **Excess**
- Click **Withdraw Excess Receival Request**



The screenshot shows a window titled "Withdraw Excess Receival Request - asmn2120". The window contains a table with the following data:

Ok Request No	Identifier	Manufacturer	Model	Official Name
<input type="checkbox"/> 1001	INV XX31	TEKTRONIX	T11209	OSCILLOSCOPE

Below the table, there are several fields:

- Asset Condition: 4 USED - GOOD
- Pick-up Location: LIVERMORE_BUILDING_E_ROOM_220
- Deliver-to Location: LIVERMORE_BUILDING_2000_ROOM_RCV
- Comment: A forklift is required to move this item

At the bottom of the window, there is a "Message" field.

Figure 1-48: Withdraw Excess Receival Request Screen

- Step 1.** Navigate to the **Withdraw Excess Receival Request** screen.
- Step 2.** Enter the request number (*1001*).
- Step 3.** Click the Tab key to populate the screen.
- Step 4.** Click the **Save** icon to withdraw your request.

MANAGE DENIED INVENTORY ASSET EXCESS RECEIVAL

You can determine if your inventory asset excess receival request has been denied by the department handling excess assets for your organization by running the **Inventory Assets with Recently Denied Requests** report. Use this report to review denied receival requests based on selected criteria.

Use the **Inventory Assets with Recently Denied Requests** report to check for denied requests. To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Assets with Recently Denied Requests** report.

NAVIGATION

- Click Mgmt
- Click Management Reports
- or...
- Click Reports
- Click Management Reports
- Click **Inventory Assets with Recently Denied Requests**



The screenshot displays the Sunflower Enterprise - Production 4.5.0.0 interface. At the top, there is a sunflower logo and the text "Sunflower Enterprise - Production 4.5.0.0" and "Powered By ORACLE". Below this, the main heading is "ASM6000 Management Reports" followed by "Repository Owner". A list of reports is displayed in two columns. The report "Inventory Assets with Recently Denied Requests" is highlighted with a blue rectangular box. Other reports include "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 Requests", "Inventory Asset Initial Events", "Purchase Order Aging Report", "Inventory Asset Interface Processing Results", "High Volume Shipping Interface Processing Results", "Inventory Asset Ongoing Events", "Previously Run Report", and "Reports Main Menu".

Figure 1-49: Reviewing Inventory Assets with Recently Denied Requests

The following report parameters were used to generate the report.

 **Sunflower Enterprise - Production 4.5.0.0 Management Reports**

ASMN6050 Inventory Assets with Recently Denied Requests

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

CURRENT Steward

Include the Steward's child Organizations

- OR -

	Identifier	Last Name	First	Mid	Prefix	Suffix
CURRENT Custodian	<input type="text"/>					
- OR -						
CURRENT User	ADM09	<input type="text"/>				

Request category?

▾

Denial DATE

Include ONLY Assets WITH a Request Denied BETWEEN (MM/DD/YYYY) AND (MM/DD/YYYY)

Include All Denied Requests

[Management Reports](#)

Figure 1-50: Recently Denied Requests Report Parameters

INVENTORY ASSETS WITH RECENTLY DENIED REQUESTS REPORT

Review the **Inventory Assets with Recently Denied Requests** report output to determine if there are any outstanding denied requests for asset transfers from your organization. The following report reveals several assets that have been denied requests for transfer from your organization.

Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Eff Date
XX61		OSCILLOSCOPE	TEKTRONIX	T11209	XX	\$ 4,750.00	01/01/1990
Current Steward : SUNFLOWER SYSTEMS		Current Custodian : FRAZIER TIMOTHY M 050167		Current Location : LIVERMORE		BUILDING : E ROOM : 220	
Current User :		Request: EXCESS RECEIVAL to :		Denied by : NINE ADM ADM09		on : 07/18/2005	
				Requester : OWNER REPOSITORY			
				Phone Number :			
				Total :		1 \$ 4,750.00	
				Report Total :		1 \$ 4,750.00	

Figure 1-51: Inventory Assets with Recently Denied Requests Report

After determining the inventory assets whose requests have been denied, navigate back to the **Maintain Inventory Assets** screen and click the **Re-Request** button to resubmit the request for the selected inventory asset. Alternatively, you can re-instate the asset or withdraw your request if you decide that you no longer want to transfer the asset.

UTILIZE EXCESS ASSETS

Excess assets are generated daily, weekly or otherwise depending upon the policies and procedures of your organization. Once generated, excess assets are placed into a review cycle that goes through one or more review periods. The review cycle enables authorized personnel to search for assets that are available for reuse. Review periods are beneficial to your organization because they enable users to find assets that have been designated as reusable excess assets that in many cases, are more cost effective than purchasing a new asset. Depending upon your policies you may choose to post a list of excess assets to a web page for users outside of your organization or for those who do not have access to Sunflower. Users within the organization that have access to Sunflower can review the list of excess assets by either using reports or the Asset Search screen.

There are a variety of ways to search for excess assets that are available for use by your organization. The following methods are available to search for available excess assets in your database:

- “Use Asset Search” on page 89 (online search)
- “Asset Search Report Output” on page 90
- “Excess Asset Report” on page 148

USE ASSET SEARCH

By using the **Asset Search** screen to find assets that have been designated as excess you can (rather than purchasing a new asset) utilize an existing asset that is available for use and place an Excess Asset Reservation with the organization that is storing the unused asset.

Scenario: The following graphic illustrates how to use the **Asset Search** screen to discover excess assets that are available for reutilization.

NAVIGATION

- Click Mgmt
- Click Asset Search

The screenshot shows the 'Asset Search - asrm2130' window. The 'Search Criteria' section includes fields for Manufacturer, Model, Official Name, Serial Number, Asset Value, and Minimum Acquisition Date. The 'Asset Type' dropdown is set to 'AUTOMATED DATA PROCESSING EQUIPMENT'. Below the search criteria, there are checkboxes for 'Agreement Assets', 'Excess Assets' (checked), 'Financial Assets', 'Inactive Assets', 'Inventory Assets', and 'Subset Assets'. The 'Assets' table below lists 11 rows of assets, all from 'HEWLETT-PACKARD' with model '9000' and official name 'COMPUTER MINI'. The last row, 'EXC E1002', is highlighted in blue. A 'Report' button is located at the bottom right of the table.

Identifier	Manufacturer	Model	Official Name
EXC E002	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0102	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0202	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0302	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0402	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0502	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0602	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0702	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0802	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0902	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E1002	HEWLETT-PACKARD	9000	COMPUTER MINI

Figure 1-52: Using Asset Search to Find Excess Assets

- Step 1.** Navigate to the **Asset Search** screen. The **Asset Search** screen is available from the Agreement, Management, Finance, Inactive and Excess modules.
- Step 2.** Check the **Excess Asset** checkbox to limit your asset search to excess assets. Specify at least one criteria in the **Search Criteria** block. In this case, **Office Equipment** is the selection for the **Asset Type** criteria.
- Step 3.** Click the **Find** icon to return the results of your **Asset Search** criteria.
 - Optionally, click the **Report** button to generate a printable report of your search results. For more information about printing the Asset Search report, see "Asset Search Report" on page 109.

ASSET SEARCH REPORT OUTPUT

Enter your reporting criteria to return a report that can be setup as either a PDF or HTML output such as the following example. Any selection criteria that you enter on this screen will be the default values in your HTML based report if you click the **Report** button after selecting your criteria.

Sunflower Enterprise		Asset Search				Page 2 of 6	
ASMN6120						07/19/2005 09:59	
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
EXC EXX01		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
		Steward : EXCESS CENTER		Location: LIVERMORE			
		Custodian : DOE JOHN 050598		BUILDING : E	ROOM : XX		
		Phone : 555.1234					
		User :					
		Phone :					
EXC EXX03		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
		Steward : EXCESS CENTER		Location: LIVERMORE			
		Custodian : DOE JOHN 050598		BUILDING : E	ROOM : XX		
		Phone : 555.1234					
		User :					
		Phone :					
EXC E0101		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
		Steward : EXCESS CENTER		Location: LIVERMORE			
		Custodian : DOE JOHN 050598		BUILDING : E	ROOM : 01		
		Phone : 555.1234					
		User :					
		Phone :					
EXC E0103		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
		Steward : EXCESS CENTER		Location: LIVERMORE			
		Custodian : DOE JOHN 050598		BUILDING : E	ROOM : 01		
		Phone : 555.1234					
		User :					
		Phone :					

Figure 1-53: Asset Search PDF Report Output

EXCESS ASSET REPORT

Use the **Excess Asset** report to check for available excess assets. To run a report perform the following:

Step 1. Select either **Excess > Excess Reports** or **Reports > Excess Reports**.

Step 2. Click the **Excess Asset** report.

NAVIGATION

- Click **Excess**
- Click **Excess Reports**
- or...
- Click **Reports**
- Click **Excess Reports**
- Click **Excess Asset**



Screenshot of the Sunflower Enterprise - Production 4.5.0.0 interface. The page title is "ASEX6000 Excess Reports" and the user is identified as "Repository Owner". The interface is powered by Oracle. A list of reports is displayed, with "Excess Assets" highlighted in a blue box.

ASEX6000 Excess Reports	
Repository Owner	
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	

Figure 1-54: Selecting Excess Assets Report

The following report parameters were used to generate the report.

Sunflower Enterprise - Production 4.5.0.0 Excess Reports

ASEX6010 Excess Assets

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

Manager

Owner

Steward

Include the Steward's child Organizations

Official Name

Manufacturer

Model

Asset Type

FSC/National Stock Number

Review Category

Review Type

Lot Master Type

Lot Master Identifier

Figure 1-55: Excess Assets Report Parameters

EXCESS ASSETS REPORT OUTPUT

Review the **Excess Assets** report output to determine if there are any excess assets available for your organization. The following report reveals several excess assets available for redeployment to your organization.

Sunflower Enterprise ASEX6010		Excess Assets				Page 3 of 4 05/23/2006 16:27	
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
E0101		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0103		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0201		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0203		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0301		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0303		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0401		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0403		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0501		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0503		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0601		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0603		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0701		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0703		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0801		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0803		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0901		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0903		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E1001		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E1003		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
EXX01		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
EXX03		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
					Total :	22.00	\$ 26,400.00
					Report Total :	22.00	\$ 26,400.00

Figure 1-56: Excess Assets Report

After determining the available excess assets, navigate back to the **Create Excess Asset Reservation** screen and submit a request for the desired excess assets.

CREATE EXCESS ASSET RESERVATIONS

An excess asset screening process may consist of posting the available assets to an internal website, to an E-mail distribution list, or users might generate reports (e.g. Asset Search, Excess Asset (Global Information) report) to view the list of available excess assets. During the screening process, if an organization wants one of the posted excess assets, they can either create the reservation themselves or notify the appropriate party within the excess department who can create the excess asset reservation, on the behalf of the requestor, and begin the transfer process of the asset to the requesting organization.

Scenario: The following graphic illustrates how to create an excess asset reservation for asset EXX06, an oscilloscope, for the Asset Center XX organization.

NAVIGATION

- Click **Excess**
- Click **Create Excess Asset Reservation**

Asset Reservations				
Date	06/15/2005 01:22:57		Phone	510.223.1221
Reserved by	MANAGER TRAINER EXCESS X EXXX		Duration	21
Organization	ASSET CENTER XX			

Assets				
Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	EXX06	TEKTRONIX	T11209	OSCILLOSCOPE
<input type="checkbox"/>				

Message Complete

Figure 1-57: Creating an Excess Asset Reservation

- Step 1.** Navigate to the **Create Excess Asset Reservation** screen.
- Step 2.** Click the Tab key to populate the screen.
- Step 3.** Press the Tab key to populate the screen. The screen automatically populates the **Date**, **Reserved by**, **Phone**, and **Organization** fields (based on your login).
- Step 4.** Enter the amount of time (days) for the reservation life span in the **Duration** field.
- Step 5.** Enter the identifier of the excess asset and click the Tab key. The **Manufacturer**, **Model**, and **Official Name** populate.
- Step 6.** Click the **Save** icon to save changes to your asset reservation record.

RETIRE INVENTORY ASSETS

Retirement of assets, commonly referred to as disposal or excess, is the process used to remove property from an organization from a physical and financial accountability perspective. Proper and efficient disposal of excess material is an important and sensitive matter that can be subject to government regulations. In many cases, the first step towards retiring an asset is to create an excess request. The excess request signifies your intent to turn an inventory asset into an excess asset. The following section describes the procedures used to initiate the excess process which includes details on how to:

- “Create an Inventory Asset Final Event” on page 97
- “Reverse Asset Final Events” on page 99
- “Re-Activate Inventory Assets” on page 104

CREATE AN INVENTORY ASSET FINAL EVENT

While an Asset Center Representative (ACR) can initiate the disposal process by creating a receival request, an ACR is not authorized to finalize an asset and remove accountability of that asset from an organization. The asset final event process is a function that only an Inventory Clerk or Inventory Manager can perform.

Scenario: The following graphic illustrates how to use the **Create Inventory Asset Final Events** screen to specify the final disposition of an asset.

- NAVIGATION**
- Click Mgmt
 - Click Create Inventory Asset Final Events

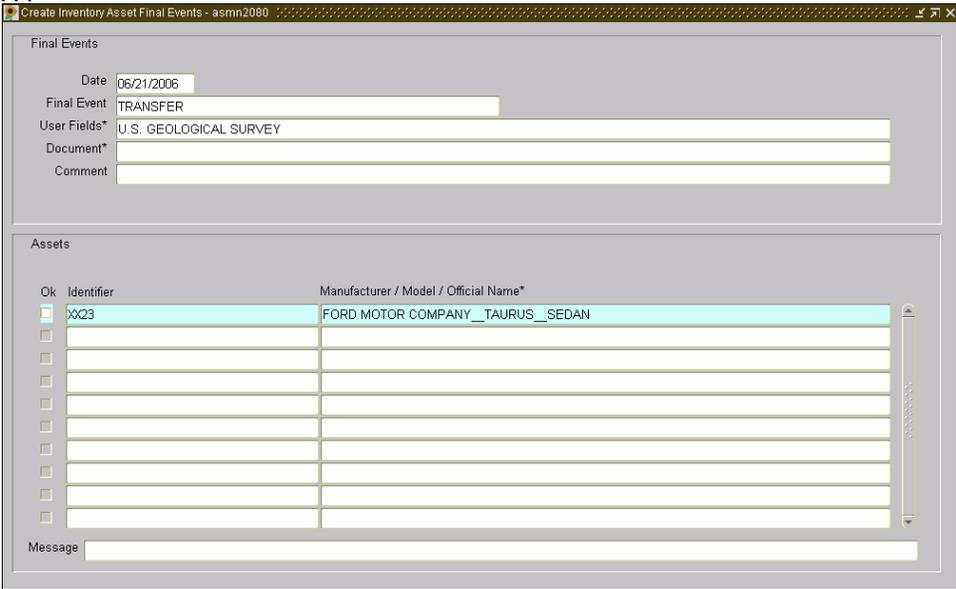


Figure 1-58: Creating an Inventory Asset Final Event

- Step 1.** Navigate to the **Create Inventory Asset Final Events** screen.
- Step 2.** Specify the date of the asset final event. The current date is the default value.
- Step 3.** Select the event type from the list of values (LOV) from the **Asset Final Event** field for the inventory asset. In this case, the asset final event type is a transfer.
- Step 4.** Double-click in the **User Fields**, to open the **Organization** pop up window and the select the organization that you are transferring ownership of the asset. Save to close this window.
- Step 5.** Double-click in the **Document field**, to open the **Maintain Documents** screen and enter the related asset final event document information. Save to close this window.
- Step 6.** Enter the identifier of the excess asset and click the Tab key. The **Manufacturer**, **Model**, and **Official Name** populate.
- Step 7.** Click the **Save** icon to save changes to your asset reservation record.

REVERSE ASSET FINAL EVENTS

You can reinstate an excess asset at any time by reversing the final event. Alternatively, you can perform a reinstatement of the excess asset by entering its asset identifier and updating its status with the **Maintain Inventory Assets** screen.

NOTE: Reversing an excess asset in this manner removes the historical record of this asset final event. If you want to retain the asset final event history, reinstate the asset using the **Maintain Inventory Assets** screen.

Scenario: The following graphic illustrates how to reinstate the excess asset, XX24, using the Create Inventory Asset Final Events screen.

NAVIGATION

- Click Mgmt
- Click Create Inventory Asset Final Events

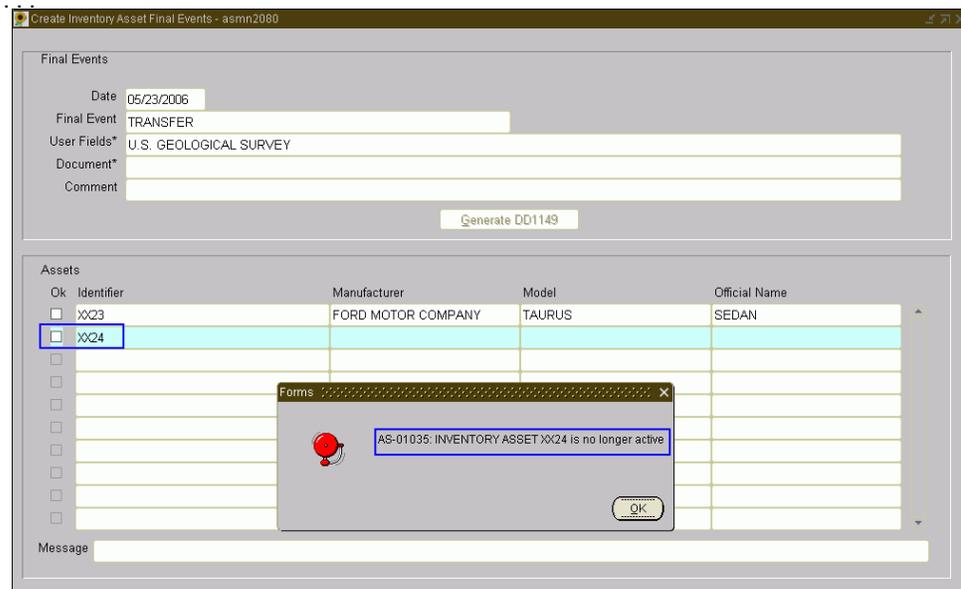


Figure 1-59: Reversing an Asset Final Event

- Step 1.** Navigate to the **Create Inventory Asset Final Events** screen.
- Step 2.** Specify the date of the asset final event. The current date is the default value.
- Step 3.** Select the event type from the list of values (LOV) from the **Asset Final Event** field for the inventory asset. In this case, the asset final event type is a transfer.
- Step 4.** Click the **Find** icon to search the database.
- Step 5.** Place cursor in the **Identifier** field for the asset that you want to reverse.
- Step 6.** Click the **Remove Record** icon to remove the specifically indicated asset record.
- Step 7.** Click the **Save** icon to reinstate the selected asset.

NOTE: You can also reinstate a retired asset using the **Maintain Excess Assets** or **Maintain Inventory Asset** screen by entering the retired asset identifier in the **Identifier** field. A prompt message informs you that this action will re-activate the asset, thereby reinstating the asset.

INVENTORY ASSET FINAL EVENTS REPORT

Use the **Inventory Asset Final Events** report to check for asset final events. To run a report perform the following:

Step 1. Select either **Mgmt > Management Reports** or **Reports > Management Reports**.

Step 2. Click the **Inventory Asset Final Events** report.

NAVIGATION

- Click Mgmt
- Click Management Reports
- or...
- Click Reports
- Click Management Reports
- Click Inventory Asset Final Events



The screenshot displays the Sunflower Enterprise - Production 4.5.0.0 interface. At the top left is a sunflower logo. To its right, the text reads "Sunflower Enterprise - Production 4.5.0.0" and "Powered By ORACLE". Below this, the main heading is "ASM6000 Management Reports" followed by "Repository Owner". A list of reports is presented in two columns. The report "Inventory Asset Final Events" is highlighted with a blue rectangular box. At the bottom of the list are two additional links: "Previously Run Report" and "Reports Main Menu".

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

Figure 1-60: Selecting the Inventory Asset Final Events Report

The following report parameters were used to generate the report.

 Sunflower Enterprise - Production 4.5.0.0 Management Reports

ASMN6070 Inventory Asset Final Events

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

Final Event Type:

Include Only Final Events Created Between: and

Asset Final Event:

Asset User Fields:

Include Which of the Following?

Asset Details (Steward, Custodian, User, and Location)
 Include Initial Event Details
 Other Identifiers

How Would You Like the Assets to be Sorted?

[Management Reports](#)

Figure 1-61: Inventory Asset Final Events Report Parameters

INVENTORY ASSET FINAL EVENTS REPORT OUTPUT

Use the **Inventory Asset Final Events** report output to review asset final events. The following report reveals an asset with a transfer final event.

Sunflower Enterprise		Inventory Asset Final Events				Page 2 of 3	
ASMN6070						05/23/2006 16:51	
Final Event : TRANSFER		on: 05/23/2006		Document : SHIPPING 5527XX			
User Fields : Organization:U.S. GEOLOGICAL SURVEY							
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Eff Date
XX05		SEDAN	FORD MOTOR COMPANY	TAURUS	222W	\$ 26,000.00	05/23/2006
	Steward:ASSET CENTER XX			Location	: LIVERMORE		
	Custodian:XX CUSTODIAN CUSTXX				BUILDING : G ROOM : 200		
	User :						
XX24		SEDAN	FORD MOTOR COMPANY	TAURUS	GH1234XX	\$ 17,000.00	01/01/1990
	Steward:SUNFLOWER SYSTEMS			Location	: LIVERMORE		
	Custodian:FRAZIER TIMOTHY M 050167				BUILDING : E ROOM : 200		
	User :						
Total :					2	\$ 43,000.00	
Report Total :					2	\$ 43,000.00	

Figure 1-62: Inventory Asset Final Events Report

RE-ACTIVATE INVENTORY ASSETS

Re-activating an asset is similar to redeploying an asset but with one very important distinction. When you redeploy an asset, the history for that asset includes the period of time in which the asset was excessed.

Scenario: The following graphic illustrates how to use the **Maintain Inventory Asset** screen to re-activate an inventory asset. The shipping document (SHIPPING_5527XX) states that a company car, inventory asset XX24, was transferred to the U.S. GEOLOGICAL SURVEY team on 06/12/2005.

NAVIGATION

- Click **Mgmt**
- Click **Maintain Inventory Asset**

The screenshot shows the 'Maintain Inventory Asset' screen with a warning dialog box. The dialog box has a yellow warning icon and the text: 'AS-01043: Warning: This asset has had a final event. Continuing will re-activate the asset'. The background form shows fields for Identifier (XX24), Unique Name, Default Location, Catalog Identifier, Manufacturer, Official Name, Serial Number, Initial Event, Asset Value, Asset Condition, Activity Status, Manager, Steward, Custodian, User, Location, Document, User Fields, and Global User Fields. The 'Activity Status' field is highlighted.

Figure 1-63: Re-Activating an Inventory Asset

- Step 1.** Navigate to the **Maintain Inventory Asset** screen.
- Step 2.** In the **Identifier** field, enter the asset identifier that you want to re-activate and press Enter to display the asset's information.

A prompt message will inform you that this action will re-activate the asset, thereby reinstating the asset.

- Step 3.** With the cursor in the **Activity Status** field, update the status to *In-Service*.
- Step 4.** Click the **Save** icon to re-activate the inventory asset.

MANAGEMENT REPORTS

Sunflower provides a flexible and comprehensive web-based reporting system. The Sunflower database is queried when a report is created and executed. Reports display real-time information. Therefore, an afternoon report may differ from a morning report by reflecting any changes made throughout the day.

There are several output options available for your reports.

- PDF (Adobe Acrobat)
- HTML
- Text

Your outputs depend upon the report selected. Acrobat and HTML are standard options provided for most reports. Text file export is available for selected reports.

Sunflower provides the following reports with the Management module:

- “Inventory Assets (Global Information) Report” on page 107
- “Asset Search Report” on page 109
- “Asset Structure Report” on page 112
- “Inventory Asset Activity Summary by Asset Flag” on page 113
- “Inventory Asset Activity Summary by Asset Type” on page 115
- “Inventory Asset Final Events” on page 117
- “Inventory Asset History” on page 120
- “Inventory Asset Initial Events” on page 122
- “Inventory Asset Interface Processing Results” on page 125
- “Inventory Asset Ongoing Events” on page 127
- “Inventory Asset Summary by Asset Flag” on page 130
- “Inventory Asset Summary by Asset Type” on page 132
- “Inventory Asset Timeline” on page 134
- “Inventory Asset Utilization” on page 136
- “Inventory Assets Pending Acceptance by Age” on page 139
- “Inventory Assets Pending Release by Age” on page 141
- “Inventory Assets with Recently Denied Requests” on page 143
- “Inventory Assets with Requests” on page 144
- “Purchase Order Aging Report” on page 145
- “Excess Asset Report” on page 148

INVENTORY ASSETS (GLOBAL INFORMATION) REPORT

The **Inventory Assets (Global Information)** report shows detail and summary information of accountable assets. Use the **Inventory Assets (Global Information)** report to display accountable asset details. To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Assets (Global Information)** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.


Sunflower Enterprise - Production 4.5.0.0 Management Reports
ASMN6030 Inventory Assets (Global Information)

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

Manager
 Owner
 Steward
 Include the Steward's child Organizations

Official Name
 Manufacturer
 Model

	Identifier	Last Name	First	Mid	Prefix	Suffix
Custodian	<input type="text"/>					
	Identifier	Last Name	First	Mid	Prefix	Suffix
User	<input type="text"/>					
	Identifier	Type				
Agreement	<input type="text"/>	<input type="text"/>				

Figure 1-64: Inventory Assets (Global Information) Report Parameters Page

ASSET SEARCH REPORT

The **Asset Search** report searches the asset repository for assets matching a description, manufacturer or model; used for asset review.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Asset Search** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



Sunflower Enterprise - Production 4.5.0.0 Management Reports

ASMN6120 Asset Search

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

Official Name

Manufacturer

Model

Model Name

Serial Number

Asset Type

National Stock Number

Minimum Asset Value

Include Only Assets Acquired Between (MM/DD/YYYY) and (MM/DD/YYYY)

Include Current Information N

Include Closed Interests N

Asset User Fields

Interest Type(s)

- AGREEMENT ASSET
- EXCESS ASSET
- FINANCIAL ASSET
- INACTIVE ASSET
- INVENTORY ASSET**
- SUBSET ASSET

How Would You Like the Assets to be Grouped?

NONE

How Would You Like the Assets to be Sorted?

1 NONE 2 NONE 3 NONE

[Management Reports](#)

Figure 1-66: Asset Search Report Parameters

ASSET SEARCH REPORT OUTPUT

Review the **Asset Search** report output for the search results of the asset repository for assets matching a description, manufacturer or model; used for asset review.

Sunflower Enterprise ASMN6120		Asset Search				Page 2 of 19 05/24/2006 11:45	
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
INV 0101	S	COMPUTER PORTABLE	APPLE	M5555	9437199	\$ 4,500.00	01/01/1995
INV 0201	S	COMPUTER PORTABLE	APPLE	M5555	929302	\$ 4,500.00	01/01/1995
INV 0301	S	COMPUTER PORTABLE	APPLE	M5555	32233002	\$ 4,500.00	01/01/1995
INV 0401	S	COMPUTER PORTABLE	APPLE	M5555	112212332213	\$ 4,500.00	01/01/1995
INV 0501	S	COMPUTER PORTABLE	APPLE	M5555	30030303	\$ 4,500.00	01/01/1995
INV 0601	S	COMPUTER PORTABLE	APPLE	M5555	22020202	\$ 4,500.00	01/01/1995
INV 0701	S	COMPUTER PORTABLE	APPLE	M5555	200202903	\$ 4,500.00	01/01/1995
INV 0801	S	COMPUTER PORTABLE	APPLE	M5555	2122212	\$ 4,500.00	01/01/1995
INV 0901	S	COMPUTER PORTABLE	APPLE	M5555	2222132S	\$ 4,500.00	01/01/1995
INV 1001	S	COMPUTER PORTABLE	APPLE	M5555	1222203	\$ 4,500.00	01/01/1995
INV 0102	S	COMPUTER PERSONAL	DELL	D333	03420349	\$ 3,400.00	05/01/1998
INV XX01	S	COMPUTER PORTABLE	APPLE	M5555	1221212	\$ 4,500.00	01/01/1995
INV 0103	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	94398342759	\$ 5,400.00	08/01/1997
INV 0104	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	938204	\$ 5,400.00	08/01/1997
INV 0105		SEDAN	FORD MOTOR COMPANY	TAURUS	49759475430	\$ 26,000.00	01/01/1990
INV 0106		OSCILLOSCOPE	TEKTRONIX	T11209	3432402HH	\$ 4,500.00	01/01/1993
INV 0302	S	COMPUTER PERSONAL	DELL	D333	2222123	\$ 3,400.00	05/01/1998
INV 0202	S	COMPUTER PERSONAL	DELL	D333	33323323	\$ 3,400.00	05/01/1998
INV 0402	S	COMPUTER PERSONAL	DELL	D333	233322323	\$ 3,400.00	05/01/1998
INV 0502	S	COMPUTER PERSONAL	DELL	D333	2323DD3	\$ 3,400.00	05/01/1998
INV 0602	S	COMPUTER PERSONAL	DELL	D333	33323D	\$ 3,400.00	05/01/1998

Figure 1-67: Asset Search Report

ASSET STRUCTURE REPORT

The **Asset Structure** report shows parent/child relationships between assets.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Asset Structure** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

For more information on how to generate and see examples of this report, see “View Parent Child Assets with the Asset Structure Report” on page 46.

INVENTORY ASSET ACTIVITY SUMMARY BY ASSET FLAG

The **Inventory Asset Activity Summary by Flag** report shows the details of agreement asset activity grouped by asset flag.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Asset Activity Summary by Flag** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



The screenshot shows a web interface for Sunflower Enterprise - Production 4.5.0.0 Management Reports. The title is "ASMN6140 Inventory Asset Activity Summary by Flags". Below the title, a question asks "How would you like to select the activity that appear on the report?". There are two date input fields, both containing "05/24/2006", with "(MM/DD/YYYY)" text to their right. Below the date fields are two buttons: "Submit" and "Reset". At the bottom left, there is a red underlined link labeled "Management Reports".

Figure 1-68: Inventory Asset Activity Summary by Flag Report Parameters

INVENTORY ASSET ACTIVITY SUMMARY BY FLAG REPORT OUTPUT

The **Inventory Asset Activity Summary by Flag** report output displays the count and dollar amounts of inventory assets grouped by asset flag types.

Sunflower Enterprise		Inventory Asset Activity Summary by Flags		Page 2 of 3	
ASMNG140				05/24/2006 12:04	
Opened Assets			Closed Assets		
	<u>Count</u>	<u>Value</u>		<u>Count</u>	<u>Value</u>
Sensitive	80.00	\$ 330,100.00	Sensitive	.00	\$.00
High Risk	.00	\$.00	High Risk	.00	\$.00
OTHER	265.00	\$ 2,652,800.00	OTHER	2.00	\$ 43,000.00
Total	345.00	\$ 2,982,900.00	total	2.00	\$ 43,000.00
Ending					
	<u>Count</u>	<u>Value</u>		<u>Count</u>	<u>Value</u>
Sensitive	80.00	\$ 330,100.00			
High Risk	.00	\$.00			
OTHER	263.00	\$ 2,609,800.00			
Total	343.00	\$ 2,939,900.00			

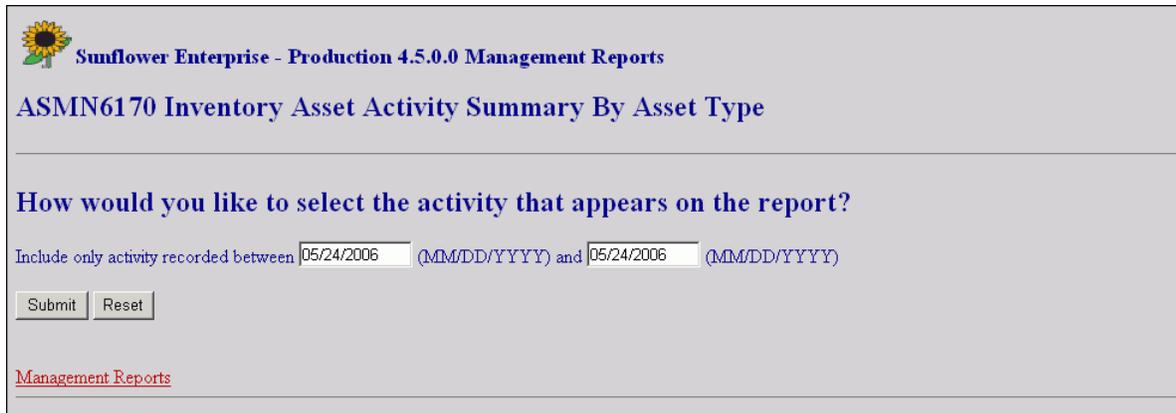
Figure 1-69: Inventory Asset Activity Summary by Flag Report

INVENTORY ASSET ACTIVITY SUMMARY BY ASSET TYPE

The **Inventory Asset Activity Summary by Asset Type** report shows the details of agreement asset activity by asset type.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Asset Activity Summary by Asset Type** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



 **Sunflower Enterprise - Production 4.5.0.0 Management Reports**

ASMN6170 Inventory Asset Activity Summary By Asset Type

How would you like to select the activity that appears on the report?

Include only activity recorded between (MM/DD/YYYY) and (MM/DD/YYYY)

[Management Reports](#)

Figure 1-70: Inventory Asset Activity Summary by Asset Type Report Parameters

INVENTORY ASSET ACTIVITY SUMMARY BY ASSET TYPE REPORT OUTPUT

The **Inventory Asset Activity Summary by Asset Type** report displays the count and amounts of inventory asset activity by asset type. For example, grouped by the Initial Event, Purchase.

Sunflower Enterprise ASMN6170		Inventory Asset Activity Summary By Asset Type						Page 3 of 6 05/24/2006 12:07	
Initial Events									
Initial : PURCHASE									
Event									
	Count	Below \$.00	Value	Count	At or Above \$.00	Value	Count	Total	Value
AUTOMATED DATA PROCESSING EQUIPMENT	0	\$	0.00	212	\$	1,056,650.00	212	\$	1,056,650.00
BUILDINGS	0	\$	0.00	22	\$	550,000.00	22	\$	550,000.00
LABORATORY EQUIPMENT	0	\$	0.00	33	\$	129,250.00	33	\$	129,250.00
MOTOR VEHICLES	0	\$	0.00	45	\$	856,500.00	45	\$	856,500.00
OFFICE EQUIPMENT	0	\$	0.00	11	\$	57,200.00	11	\$	57,200.00
Total	0	\$	0.00	323	\$	2,649,600.00	323	\$	2,649,600.00
Initial : TRANSFER									
Event									
	Count	Below \$.00	Value	Count	At or Above \$.00	Value	Count	Total	Value
LABORATORY EQUIPMENT	0	\$	0.00	11	\$	47,300.00	11	\$	47,300.00
MOTOR VEHICLES	0	\$	0.00	11	\$	286,000.00	11	\$	286,000.00
Total	0	\$	0.00	22	\$	333,300.00	22	\$	333,300.00
Initial Events Total	0	\$	0.00	345	\$	2,982,900.00	345	\$	2,982,900.00

Figure 1-71: Inventory Asset Activity Summary by Asset Type Report

INVENTORY ASSET FINAL EVENTS

The **Inventory Asset Final Events** report shows the details of accountable asset final events, (e.g. loss, abandonment and transfers).

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Asset Final Events** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)

Step 6. Click the **eXecute** button to generate the report.

 **Sunflower Enterprise - Production 4.5.0.0 Management Reports**

ASMN6070 Inventory Asset Final Events

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

Final Event Type:

Include Only Final Events Created Between: (MM/DD/YYYY) and (MM/DD/YYYY)

Asset Final Event:  

Asset User Fields:  

Include Which of the Following?

- Asset Details (Steward, Custodian, User, and Location)
- Include Initial Event Details
- Other Identifiers

How Would You Like the Assets to be Sorted?



[Management Reports](#)

Figure 1-72: Inventory Asset Final Events Report Parameters

INVENTORY ASSET FINAL EVENTS REPORT OUTPUT

The **Inventory Asset Final Events** report output displays details of accountable asset final events, (e.g. loss, abandonment and transfers).

Sunflower Enterprise ASMN6090		Asset Interface Processing Results		Page 2 of 6 10/07/2005 13:04
Load Group : ACQ				
Record Group	Date	Result		
Success Total		0		
Record Group	Date	Result		
0127	07/29/1998 16:32:54	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0128	07/29/1998 16:32:55	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D01'		
0129	07/29/1998 16:32:55	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0227	07/29/1998 16:32:55	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0228	07/29/1998 16:32:55	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D02'		
0229	07/29/1998 16:32:55	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0327	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0328	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D03'		
0329	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0427	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0428	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D04'		
0429	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0527	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0528	07/29/1998 16:32:57	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D05'		
0529	07/29/1998 16:32:57	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		

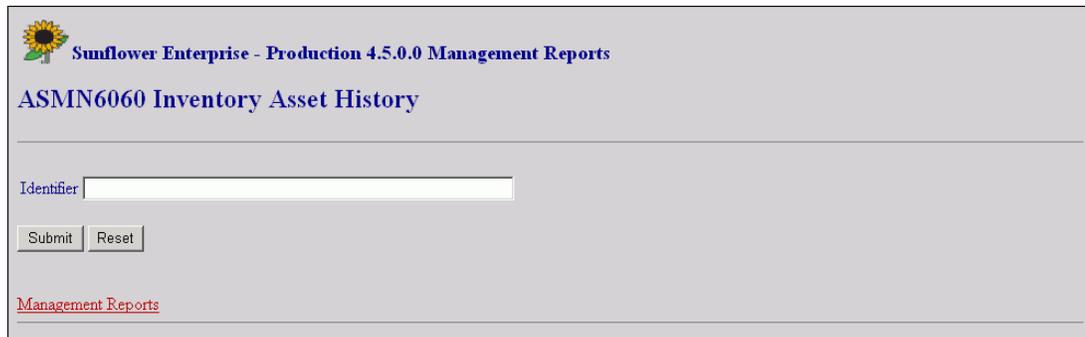
Figure 1-73: Inventory Asset Interface Processing Results Report

INVENTORY ASSET HISTORY

The **Inventory Asset History** report shows the detailed changes, and who made them, for accountable assets.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Asset History** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



Sunflower Enterprise - Production 4.5.0.0 Management Reports

ASMN6060 Inventory Asset History

Identifier

[Management Reports](#)

Figure 1-74: Inventory Asset History Report Parameters

INVENTORY ASSET HISTORY REPORT OUTPUT

The **Inventory Asset History** report output displays the details of accountable asset history, (e.g. initial events, final events, stewards).

Sunflower Enterprise		Inventory Asset History		Page 2 of 3	
ASMM6060				05/24/2006 12:13	
Identifier: 0109					
Flags:					
Official Name: COMPUTER PERSONAL					
Manufacturer: DELL					
Model: D333					
Serial Number: 393827523					
Drawing No.:					
Asset Value: \$ 5,500.00					
Acquisition Date: 01/01/1999					
Initial Event: PURCHASE		on: 05/06/1999		User Fields: Purchase Order:PO769__Purchase Order Line:1__Purchase Account:3737	
Final Event:		on:		User Fields:	
Eff Date	Steward	Custodian	User	Location	Ext Rt Dt Actv Stat
01/01/1999	SUNFLOWER SYSTEMS	FRAZIER KRISTEN S 020866		LIVERMORE BUILDING : E ROOM : 200	IS
User Fields:					
Global User Fields: IP Address:128.115.33.22**Memory:96 MB					
Document Type:			Identifier:		
Storage Type:			Organization:		
Document User Field:					
Created by: OWNER REPOSITORY			on: 05/06/1999 00:15		

Figure 1-75: Inventory Asset History Results Report

For more information about generating Inventory Asset History reports by using the unique identifier, see the User Interface chapter of the Sunflower Enterprise User Guide.

INVENTORY ASSET INITIAL EVENTS

The **Inventory Asset Initial Events** report shows the details of accountable asset initial events (e.g. purchase, construction and transfers).

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Asset Initial Events** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)

Step 6. Click the **eXecute** button to generate the report.

 **Sunflower Enterprise - Production 4.5.0.0 Management Reports**

ASMN6075 Inventory Asset Initial Events

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

Initial Event Type

Include Only Initial Events Created Between (MM/DD/YYYY) and (MM/DD/YYYY)

Asset Initial Event  

Asset User Fields  

Include Which of the Following?

- Asset Details (Steward, Custodian, User and Location)
- Other Identifiers

How Would You Like the Assets to be Sorted?

[Management Reports](#)

Figure 1-76: Inventory Asset Initial Events Report Parameters

INVENTORY ASSET INITIAL EVENTS REPORT OUTPUT

The Inventory Asset Initial Events report displays the details of accountable asset initial events (e.g. purchase, construction and transfers).

Sunflower Enterprise		Inventory Asset Initial Event				Page 2 of 68	
ASMN6070						05/24/2006 12:17	
Initial Event : PURCHASE							
Identifier	Flags	Official Name	Manufacturer	Model	Official Name	Asset Value	Eff Date
0101	S	COMPUTER PORTABLE	APPLE	M5555	9437198	\$ 4,500.00	05/08/1999
Initial Event Date : 05/04/1999 Document :							
User Fields : Purchase Order:PO12_Purchase Order Line:1_Purchase Account:55212							
Steward : ASSET CENTER 01				Location : LIVERMORE			
Custodian : DOE JOHN 050599				BUILDING : G ROOM : 200			
User :							
Comment : COMMENT							
05/05/1999							
This is the first comment for this asset.							
0102	S	COMPUTER PERSONAL	DELL	D333	03420349	\$ 3,400.00	05/01/1999
Initial Event Date : 05/05/1999 Document :							
User Fields : Purchase Order:PO1_Purchase Order Line:2_Purchase Account:5512							
Steward : ASSET CENTER 01				Location : LIVERMORE			
Custodian : FRAZIER KRISTEN S 020966				BUILDING : E ROOM : 100			
User :							
0103	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	94398242759	\$ 5,400.00	08/01/1997
Initial Event Date : 05/05/1999 Document :							
User Fields : Purchase Order:PO55_Purchase Order Line:1_Purchase Account:GG554							
Steward : ASSET CENTER 01				Location : LIVERMORE			
Custodian : FRAZIER KRISTEN S 020966				BUILDING : E ROOM : 200			
User :							
0104	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	938204	\$ 5,400.00	08/01/1997
Initial Event Date : 05/05/1999 Document :							
User Fields : Purchase Order:PO55_Purchase Order Line:2_Purchase Account:55GFT							
Steward : ASSET CENTER 01				Location : LIVERMORE			
Custodian : ONE CUSTODIAN CUST01				BUILDING : F ROOM : 100			
User :							
0106		OSCILLOSCOPE	TEKTRONIX	T11209	3432402HH	\$ 4,500.00	01/01/1993
Initial Event Date : 05/05/1999 Document :							
User Fields : Purchase Order:PO33_Purchase Order Line:1_Purchase Account:2243							
Steward : ASSET CENTER 01				Location : LIVERMORE			
Custodian : ONE CUSTODIAN CUST01				BUILDING : F ROOM : 100			
User :							

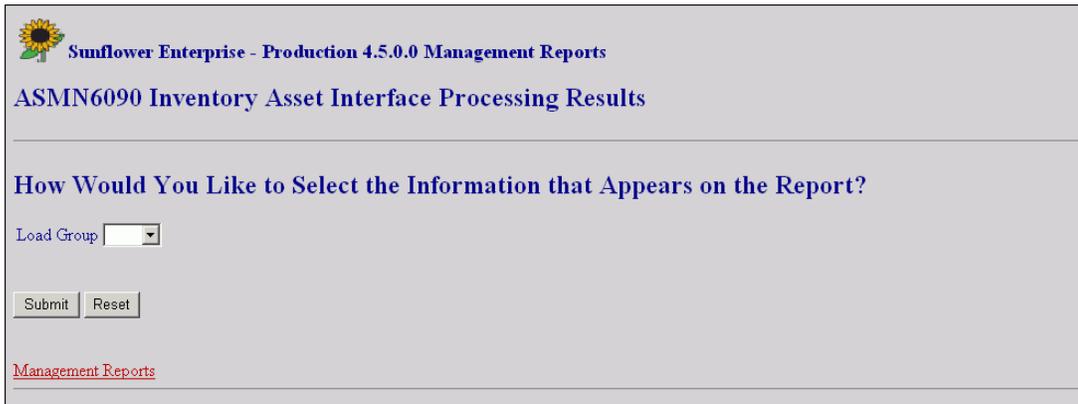
Figure 1-77: Inventory Asset Initial Events Report

INVENTORY ASSET INTERFACE PROCESSING RESULTS

The **Inventory Asset Interface Processing Results** report shows the results of processing the contents of AS_LOAD_INVENTORY_ASSETS interface table.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Asset Interface Processing Results** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



 Sunflower Enterprise - Production 4.5.0.0 Management Reports

ASMN6090 Inventory Asset Interface Processing Results

How Would You Like to Select the Information that Appears on the Report?

Load Group

[Management Reports](#)

Figure 1-78: Inventory Asset Interface Processing Results Report Parameters

INVENTORY ASSET INTERFACE PROCESSING RESULTS REPORT OUTPUT

The **Inventory Asset Interface Processing Results** report displays the results of processing the contents of AS_LOAD_INVENTORY_ASSETS interface table.

Sunflower Enterprise ASMN6090		Inventory Asset Interface Processing Results	Page 2 of 6 05/24/2006 12:20
Load Group : ACQ			
Record Group	Date	Result	
Success Total		0	
Record Group	Date	Result	
0127	07/29/1999 16:32:54	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'	
0128	07/29/1999 16:32:55	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D01'	
0129	07/29/1999 16:32:55	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'	
0227	07/29/1999 16:32:55	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'	
0228	07/29/1999 16:32:55	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D02'	
0229	07/29/1999 16:32:55	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'	
0327	07/29/1999 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'	
0328	07/29/1999 16:32:56	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D03'	
0329	07/29/1999 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'	
0427	07/29/1999 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'	
0428	07/29/1999 16:32:56	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D04'	
0429	07/29/1999 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'	
0527	07/29/1999 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'	
0528	07/29/1999 16:32:57	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D05'	
0529	07/29/1999 16:32:57	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'	

Figure 1-79: Inventory Asset Interface Processing Results Report

INVENTORY ASSET ONGOING EVENTS

The **Inventory Asset Ongoing Events** report shows the details of ongoing events, (e.g. maintenance, repairs and mileage captured), for agreement assets for a time period. Use the **Inventory Asset Ongoing Events** report to view assets ongoing events over a period of time.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Asset Ongoing Events** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

 **Sunflower Enterprise - Production 4.5.0.0 Management Reports**

ASMN6076 Inventory Asset Ongoing Events

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

Identifier

Ongoing Event Type

Include Only Ongoing Events Created Between (MM/DD/YYYY) and (MM/DD/YYYY)

Asset Ongoing Event  

Asset User Fields  

Include Which of the Following?

Asset Details (Steward, Custodian, User, and Location)

Other Identifiers

How Would You Like the Assets to be Sorted?

DATE 

[Management Reports](#)

Figure 1-80: Inventory Asset Ongoing Events Report Parameters

INVENTORY ASSET SUMMARY BY ASSET FLAG

The **Inventory Asset Summary by Asset Flag** report summarizes inventory asset value and count by asset flag.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Asset Summary by Asset Flag** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

 **Sunflower Enterprise - Production 4.5.0.0 Management Reports**

ASMN6130 Inventory Asset Summary by Flags

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

Summary Type

Asset Event Type

If Summary Type is Active:
Include Only Assets Active as of

If Summary Type is Initial Event or Final Event:
Include only assets with an event recorded between (MM/DD/YYYY) and (MM/DD/YYYY)

How Would You Like the Assets to be Grouped?

[Management Reports](#)

Figure 1-82: Inventory Asset Summary by Flag Report Parameters

INVENTORY ASSET SUMMARY BY FLAG REPORT OUTPUT

The **Inventory Asset Summary by Flag** report summarizes the total inventory asset value and count by asset flag.

Sunflower Enterprise		Inventory Asset Summary by Flags		Page 2 of 3	
ASMN6130				05/24/2006 12:30	
		Count		Value	
Sensitive		80	\$	230,100.00	
High Risk		0	\$	0.00	
OTHER		263	\$	2,609,800.00	
Total		343	\$	2,939,900.00	
All		Count		Value	
Sensitive		80	\$	230,100.00	
High Risk		0	\$	0.00	
OTHER		263	\$	2,609,800.00	
Report Total		343	\$	2,939,900.00	
			\$	2,939,900.00	

Figure 1-83: Inventory Asset Summary by Flag Report

INVENTORY ASSET SUMMARY BY ASSET TYPE

The **Inventory Asset Summary by Asset Type** report summarizes inventory asset value and count by asset type.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Asset Summary by Asset Type** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



Sunflower Enterprise - Production 4.5.0.0 Management Reports

ASMN6160 Inventory Asset Summary by Asset Type

How would you like to select the assets that appear on the report?

Summary Type

Asset Event Type

If Summary Type is Active:
 Include only assets active as of

If Summary Type is Initial Event or Final Event
 Include only assets with an event recorded between (MM/DD/YYYY) and (MM/DD/YYYY)

How would you like the assets to be grouped?

[Management Reports](#)

Figure 1-84: Inventory Asset Summary by Asset Type Report Parameters

INVENTORY ASSET SUMMARY BY ASSET TYPE REPORT OUTPUT

The **Inventory Asset Summary by Asset Type** report summarizes the total inventory asset value and count by asset type.

Sunflower Enterprise		Inventory Asset Summary By Asset Type						Page 2 of 3	
ASMN6160								05/24/2006 12:33	
	Count	Below \$.00	Value	Count	At or Above \$.00	Value	Count	Total	Value
AUTOMATED DATA PROCESSING EQUIPMENT	0	\$	0.00	212	\$	1,056,650.00	212	\$	1,056,650.00
BUILDINGS	0	\$	0.00	22	\$	550,000.00	22	\$	550,000.00
LABORATORY EQUIPMENT	0	\$	0.00	44	\$	176,550.00	44	\$	176,550.00
MOTOR VEHICLES	0	\$	0.00	54	\$	1,099,500.00	54	\$	1,099,500.00
OFFICE EQUIPMENT	0	\$	0.00	11	\$	57,200.00	11	\$	57,200.00
Total	0	\$	0.00	343	\$	2,939,900.00	343	\$	2,939,900.00
Report Total	0	\$	0.00	343	\$	2,939,900.00	343	\$	2,939,900.00

Figure 1-85: Inventory Asset Summary by Asset Type Report

INVENTORY ASSET TIMELINE

The **Inventory Asset Timeline** report displays the event timeline of inventory assets over a time period.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Asset Timeline** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

 **Sunflower Enterprise - Production 4.5.0.0 Management Reports**

ASMN6190 Inventory Asset Timeline

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

Identifier

Timeline Activity Description

From (MM/DD/YYYY) To (MM/DD/YYYY)

Include Which of the Following?

- Asset Events
- Closed Asset Requests
- Open Asset Requests
- Resolutions

How Would You Like the Timeline Activities to be Sorted?

1 2 3

[Management Reports](#)

Figure 1-86: Inventory Asset Timeline Report Parameters

INVENTORY ASSET TIMELINE REPORT OUTPUT

The **Inventory Asset Timeline** report displays the event timeline of inventory assets over a time period.

Sunflower Enterprise		Inventory Asset Timeline		Page 2 of 3	
ASMN6190				05/23/2006 17:03	
Identifier : INV XX24					
Datetime	Category Type	Description	Attributes	Created By	Recorded By
05/23/2006 12:59:49	FINAL EVENT	INV XX24 TRANSFER	Organization:U.S. GEOLOGICAL SURVEY	TRAINER SYSTEMS ADMXX	TRAINER SYSTEMS ADMXX
Document : SHIPPING__5527XX					
07/27/1998 09:49:06	INITIAL EVENT	INV XX24 PURCHASE	Purchase Order:P079_Purchase Order Line:1_Purchase Account:1214	OWNER REPOSITORY	OWNER REPOSITORY
07/27/1998 09:49:06	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	Asset Value Type:ACQUISITION COST_Commodity Asset Action:__Dollar Value Increment:17000_Quantity Increment:0	OWNER REPOSITORY	OWNER REPOSITORY

Figure 1-87: Inventory Asset Timeline Report

INVENTORY ASSET UTILIZATION

The **Inventory Asset Utilization** report displays the percentage utilization of inventory assets over a time period.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Asset Utilization** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



Sunflower Enterprise - Production 4.5.0.0 Management Reports

ASMN6150 Inventory Asset Utilization

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

Manager
 Owner
 Steward
 Include the Steward child Organizations

Official Name
 Manufacturer
 Model

Custodian

Identifier	Last Name	First	Mid	Prefix	Suffix
<input type="text"/>					

User

Identifier	Last Name	First	Mid	Prefix	Suffix
<input type="text"/>					

Location

Site/Off-Site Type	Stlv1 Type	Stlv1 Identifier	Stlv2 Type	Stlv2
<input type="text"/>	BUILDING	<input type="text"/>	ROOM	<input type="text"/>

Consider Only Activity Between (MM/DD/YYYY) and (MM/DD/YYYY)
 Include Only Asset With Utilization % Between and
 Include Utilization Detail
 Absolute or Relative Duration

How Would You Like the Assets to be Grouped?

How Would You Like the Assets to be Sorted?

1 2 3

[Management Reports](#)

Figure 1-88: Inventory Asset Utilization Report Parameters

INVENTORY ASSET UTILIZATION REPORT OUTPUT

The **Inventory Asset Utilization** report displays the percentage utilization of inventory assets over a time period.

Sunflower Enterprise ASMNG150		Inventory Asset Utilization				Page 2 of 52 05/24/2006 12:38	
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Util %
0101	S	COMPUTER PORTABLE	APPLE	M5555	9437199	\$ 4,500.00	49.13
		Steward:ASSET CENTER 01 Custodian:DOE JOHN 050599 User:			Location:LIVERMORE BUILDING:G ROOM:200		
0102	S	COMPUTER PERSONAL	DELL	D333	03420349	\$ 3,400.00	49.12
		Steward:ASSET CENTER 01 Custodian:FRAZIER KRISTEN S 020966 User:			Location:LIVERMORE BUILDING:E ROOM:100		
0103	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	94399342759	\$ 5,400.00	49.12
		Steward:ASSET CENTER 01 Custodian:FRAZIER KRISTEN S 020966 User:			Location:LIVERMORE BUILDING:E ROOM:200		
0104	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	939204	\$ 5,400.00	49.12
		Steward:ASSET CENTER 01 Custodian:ONE CUSTODIAN CUST01 User:			Location:LIVERMORE BUILDING:F ROOM:100		
0105		SEDAN	FORD MOTOR COMPANY	TAURUS	49759475430	\$ 26,000.00	49.11
		Steward:ASSET CENTER 01 Custodian:ONE CUSTODIAN CUST01 User:			Location:LIVERMORE BUILDING:F		
0106		OSCILLOSCOPE	TEKTRONIX	T11209	3432402HH	\$ 4,500.00	49.11
		Steward:ASSET CENTER 01 Custodian:ONE CUSTODIAN CUST01 User:			Location:LIVERMORE BUILDING:F ROOM:100		
0107		COMPUTER PORTABLE	APPLE	M5555	49571451	\$ 4,550.00	49.11
		Steward:SUNFLOWER SYSTEMS Custodian:FRAZIER KRISTEN S 020966 User:			Location:LIVERMORE BUILDING:E ROOM:100		

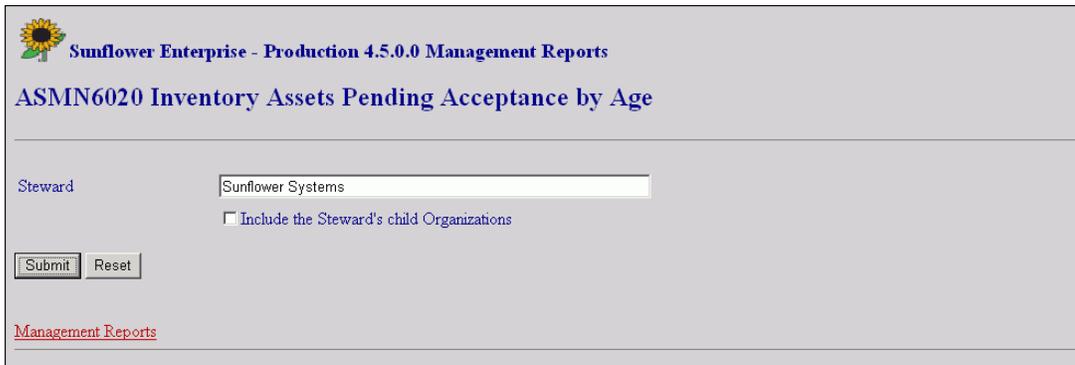
Figure 1-89: Inventory Asset Utilization Report

INVENTORY ASSETS PENDING ACCEPTANCE BY AGE

The **Inventory Assets Pending Acceptance by Age** report displays a summary of assets awaiting acceptance by age and steward.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Assets Pending Acceptance by Age** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



Sunflower Enterprise - Production 4.5.0.0 Management Reports

ASMN6020 Inventory Assets Pending Acceptance by Age

Steward:

Include the Steward's child Organizations

[Management Reports](#)

Figure 1-90: Inventory Assets Pending Acceptance by Age Report Parameters

INVENTORY ASSETS PENDING ACCEPTANCE BY AGE REPORT OUTPUT

Review the **Inventory Assets Pending Acceptance by Age** report output for a summary of assets awaiting acceptance by age and steward.

Sunflower Enterprise		Inventory Asset Utilization				Page 2 of 38	
ASMNG150						11/01/2005 15:14	
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Util %
0104	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	938204	\$ 5,400.00	47.07
		Steward: SUNFLOWER SYSTEMS		Location: LIVERMORE			
		Custodian: DOE JOHN JODOE		BUILDING: INACTIVE ROOM: RCV			
		User: TRAINER CUSTODIAN CUSTXX					
0107		COMPUTER PORTABLE	APPLE	M555	49571451	\$ 4,550.00	47.32
		Steward: SUNFLOWER SYSTEMS		Location: LIVERMORE			
		Custodian: FRAZIER KRISTEN S 020966		BUILDING: E ROOM: 100			
		User:					
0108		COMPUTER-PERSONAL	APPLE	M5600	493957483	\$ 5,600.00	47.32
		Steward: SUNFLOWER SYSTEMS		Location: LIVERMORE			
		Custodian: FRAZIER KRISTEN S 020966		BUILDING: E ROOM: 200			
		User:					
0110		OSCILLOSCOPE	TEKTRONIX	T11209	343749HH998	\$ 4,300.00	47.32
		Steward: SUNFLOWER SYSTEMS		Location: LIVERMORE			
		Custodian: FRAZIER KRISTEN S 020966		BUILDING: E ROOM: 200			
		User:					
0111		SEDAN	FORD MOTOR COMPANY	TAURUS	38-193454854	\$ 24,500.00	47.32
		Steward: SUNFLOWER SYSTEMS		Location: GENERAL OFF SITE			
		Custodian: FRAZIER KRISTEN S 020966		111 MAIN ST			
		User:		LIVERMORE, CA			
				USA 94550			
0121	S	COMPUTER PERSONAL	COMPAQ	MODEL 1	45601	\$ 3,400.00	45.89
		Steward: SUNFLOWER SYSTEMS		Location: LIVERMORE			
		Custodian: FRAZIER KRISTEN S 020966		BUILDING: E ROOM: 200			
		User:					
0122	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	12301	\$ 3,600.00	45.89
		Steward: SUNFLOWER SYSTEMS		Location: LIVERMORE			
		Custodian: JONES SUSAN O 01		BUILDING: G ROOM: 1212			
		User:					

Figure 1-91: Inventory Assets Pending Acceptance by Age Report

INVENTORY ASSETS PENDING RELEASE BY AGE

The **Inventory Assets Pending Release by Age** report displays a summary of accountable assets pending release to the initial custodian by age and steward.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Assets Pending Release by Age** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

 Sunflower Enterprise - Production 4.5.0.0 Management Reports

ASMN6010 Inventory Assets Pending Release by Age

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

Steward

Include the Steward's child Organizations

Include INTERFACE Records

Include Asset Details

How Would You Like the Assets to be Grouped?

[Management Reports](#)

Figure 1-92: Inventory Assets Pending Release by Age Report Parameters

INVENTORY ASSETS PENDING RELEASE BY AGE REPORT OUTPUT

Review the Inventory Assets Pending Release by Age report for a summary of accountable assets pending release to the initial custodian by age and steward.

Sunflower Enterprise
ASMNG150

Page 2 of 38
11/01/2005 15:14

Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Util %
0104	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	938204	\$ 5,400.00	47.07
		Steward: SUNFLOWER SYSTEMS		Location: LIVERMORE			
		Custodian: DOE JOHN JODOE		BUILDING: INACTIVE ROOM: RCV			
		User: TRAINER CUSTODIAN CUSTXX					
0107		COMPUTER PORTABLE	APPLE	M555	48571451	\$ 4,550.00	47.32
		Steward: SUNFLOWER SYSTEMS		Location: LIVERMORE			
		Custodian: FRAZIER KRISTEN S 020966		BUILDING: E ROOM: 100			
		User:					
0108		COMPUTER-PERSONAL	APPLE	M5600	483957483	\$ 5,600.00	47.32
		Steward: SUNFLOWER SYSTEMS		Location: LIVERMORE			
		Custodian: FRAZIER KRISTEN S 020966		BUILDING: E ROOM: 200			
		User:					
0110		OSCILLOSCOPE	TEKTRONIX	T11209	343749HH998	\$ 4,300.00	47.32
		Steward: SUNFLOWER SYSTEMS		Location: LIVERMORE			
		Custodian: FRAZIER KRISTEN S 020966		BUILDING: E ROOM: 200			
		User:					
0111		SEDAN	FORD MOTOR COMPANY	TAURUS	38-193454854	\$ 24,500.00	47.32
		Steward: SUNFLOWER SYSTEMS		Location: GENERAL OFF SITE			
		Custodian: FRAZIER KRISTEN S 020966		111 MAIN ST			
		User:		LIVERMORE, CA			
				USA 94550			
0121	S	COMPUTER PERSONAL	COMPAQ	MODEL 1	45601	\$ 3,400.00	45.89
		Steward: SUNFLOWER SYSTEMS		Location: LIVERMORE			
		Custodian: FRAZIER KRISTEN S 020966		BUILDING: E ROOM: 200			
		User:					
0122	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	12301	\$ 3,600.00	45.89
		Steward: SUNFLOWER SYSTEMS		Location: LIVERMORE			
		Custodian: JONES SUSAN O 01		BUILDING: G ROOM: 1212			
		User:					

Figure 1-93: Inventory Assets Pending Release by Age Report

INVENTORY ASSETS WITH RECENTLY DENIED REQUESTS

The **Inventory Assets with Recently Denied Requests** report shows accountable assets with denied requests.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Assets with Recently Denied Requests** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

For more information on how to generate and see examples of this report, see “Inventory Assets with Recently Denied Requests Report” on page 87.

INVENTORY ASSETS WITH REQUESTS

The **Inventory Assets with Requests** report shows accountable assets with open change steward, custodian, user and location requests.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Inventory Assets with Requests** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

For more information on how to generate and see examples of this report, see “Inventory Assets with Requests Report” on page 56.

PURCHASE ORDER AGING REPORT

The **Purchase Order Aging** report shows the detailed information of outstanding purchases orders requiring receipt and tagging of property.

To run a report perform the following:

- Step 1.** Select either **Mgmt > Management Reports** or **Reports > Management Reports**.
- Step 2.** Click the **Purchase Order Aging** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

 Sunflower Enterprise - Production 4.5.0.0 Management Reports

ASPO6010 Purchase Order Aging Report

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

PO Identifier
Item #
Description

Display Aging (in days)

Start From (default 0)
Interval (default 30)
Display Values For Quantity Allocated: Include quantity allocated from Interface Table

Include Which of the Following?

- PO Header Attributes
- PO Item Attributes
- Only Incomplete POs
- Only those PO Items whose quantity received is more than the quantity allocated to assets

How Would You Like the Purchase Orders to be Grouped?

How Would You Like the Purchase Orders to be Sorted?

1 2 3

How Would You Like the Purchase Order Items to be Sorted?

[Management Reports](#)

Figure 1-94: Purchase Order Aging Report Parameters

PURCHASE ORDER AGING REPORT OUTPUT

The **Purchase Order Aging** report displays the detailed information of outstanding purchases orders requiring receipt and tagging of property.

Sunflower Enterprise		Purchase Order Aging Report					Page 2 of 14	
ASPO6010							10/07/2005 13:26	
PO Identifier : 1005 PO SUPPLIER: AMERSHAM PHARMACIA__ORGANIZATION: 2222__								
Item #	Description	Age	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Days	
1	SEQUENCER	680						3
Item # Total :		1	3					3
PO Identifier : 1070 PO SUPPLIER: TEST SUPPLIER__ORGANIZATION: ABMM__								
Item #	Description	Age	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Days	
1	SAMPLE ITEM TO BE ROUTED FOR APPROVAL	680						2
Item # Total :		1	2					2
PO Identifier : 1071 PO SUPPLIER: TEST SUPPLIER__ORGANIZATION: ABMM__								
Item #	Description	Age	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Days	
1	SAMPLE ITEM TO BE ROUTED FOR APPROVAL	680						1
Item # Total :		1	1					1
PO Identifier : 10810 PO SUPPLIER: FISHER SCIENTIFIC__ORGANIZATION: BAOQ__								
Item #	Description	Age	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Days	
1	\$951237, MEGATTRACT DNA BLOOD MINI 48 KIT	680						2
2	\$995652 FILTERTIPS, 1000UL, M48	680						12

Figure 1-95: Purchase Order Aging Report

EXCESS ASSET REPORT

Use the **Excess Asset** report to check for available excess assets. To run a report perform the following:

- Step 1.** Select either **Excess > Excess Reports** or **Reports > Excess Reports**.
- Step 2.** Click the **Excess Asset** report.
- Step 3.** Specify criteria on the report parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

Sunflower Enterprise - Production 4.5.0.0 Excess Reports

ASEX6010 Excess Assets

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

Manager

Owner

Steward

Include the Steward's child Organizations

Official Name

Manufacturer

Model

Asset Type

FSC/National Stock Number

Review Category

Review Type

Lot Master Type

Lot Master Identifier

Figure 1-96: Excess Assets Report Parameters

EXCESS ASSETS REPORT OUTPUT

Review the **Excess Assets** report to determine if there are any excess asset available for your organization. The following report reveals several excess asset available for transfer.

Sunflower Enterprise ASEX6010		Excess Assets				Page 2 of 4 07/19/2005 11:04	
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
E0101		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0102		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0201		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0202		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0301		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0302		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0401		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0402		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0501		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0502		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0601		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990

Figure 1-97: Excess Assets Report

After determining the available excess assets for transfer to your organization, you can navigate back to the **Create Excess Asset Reservation** screen and submit your request for the selected excess asset. For more information about generating Excess Asset Reports, see “Excess Asset Report” on page 91.



FINANCE

The Finance module enables you to perform tasks that are associated with financial management and fiscal accountability. This chapter presents how to perform setup functions required to enable end users to work in the Finance module. Additionally, this chapter illustrates how to use the Finance module to capitalize, de-capitalize, depreciate, and apply capital value adjustments. The Finance module provides a view to each recorded transaction in real-time for the debits and credits (journal entry lines) produced and posted to the subsidiary ledger within Sunflower.

KEY CONCEPTS

This chapter includes the following discussion points and concepts:

- “About Financial Assets”
- “Finance Roles”
- “Setup Financial Assets”
- “Create Financial Assets”
- “Manage Financial Assets”
- “Financial (Capital) Asset Reports”

ABOUT FINANCIAL ASSETS

The Finance module enables you to perform the tasks that are associated with financial management of assets:

- Capitalization
- De-capitalization
- Capital Value Adjustments
- Depreciation

You will find that the journal entry lines created by the transactions you record are produced in real-time and posted to a subsidiary ledger within the Sunflower application database where you can examine the debits and credits of the subsidiary ledger at any time.

Sunflower adapts to the specific account code structure that your organization uses and is configurable for your site's account code structure.

FINANCE MODULE WORKFLOW

The Finance module handles four primary functions: setup, creation, management and closing of assets. The following workflow diagram depicts these functions based on the menu items found within the Finance module.

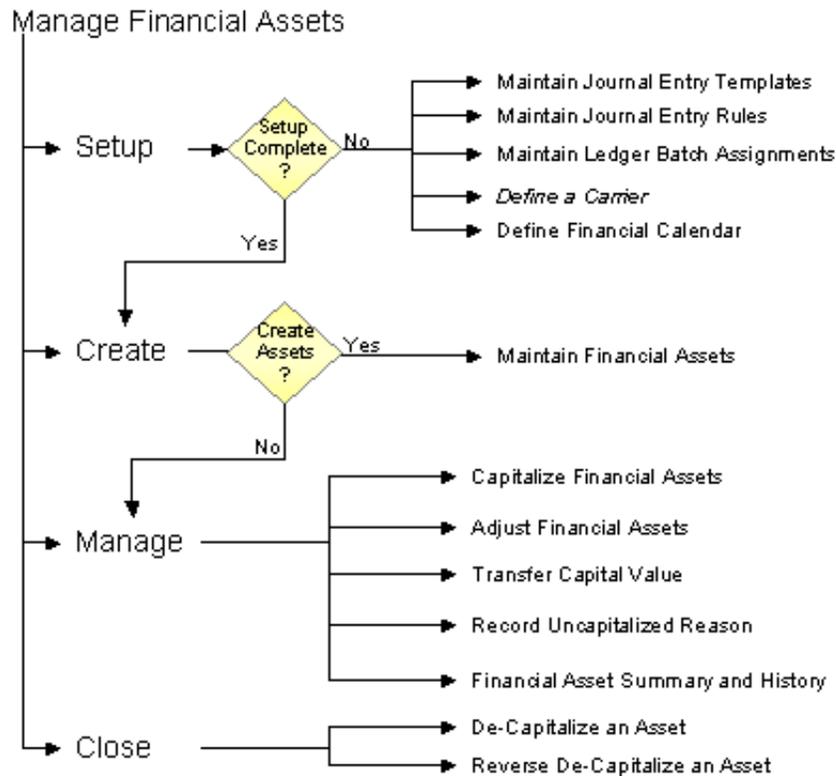


Figure 2-1: The Finance Module Workflow

FINANCE ROLES

Sunflower approaches asset management with the belief that you can manage, monitor, control, and account for an asset throughout its distinct lifecycle. Sunflower does not impose the way in which you have to manage your assets but provides guidelines, structures, processes, and tools to help you manage them effectively. The users that you assign to manage the various aspects of an asset at each stage of the lifecycle will depend upon your organizational structure and processes.

A Sunflower user is any individual to whom you assign one or more roles. The assignment of Sunflower roles enables users to perform job duties that are enabled by the specified role. Roles provide access to screens and define the extent to which an individual can perform functions such as adding, updating, and retiring asset records. The user in question may be an employee or a contractor working on the behalf of your organization who has a job function that requires either active (e.g. create, update or delete functions) or passive (e.g. general inquiry, searching and reporting) use of menu items in the Inventory module.

Depending upon your organizational structure you may find that in a small, or centralized, organization you may assign your users as Managers who are responsible for performing all or many of the tasks related to the day-to-day management of inventory. However, with a larger, or decentralized, organization you may choose to assign users who are responsible for inventory management varying roles pertaining to the management module based on the tasks for which they are responsible. Refer to “Finance Menu Access” on page 151 to view the menu items that are accessible for each finance role.

For more information about Sunflower application roles, see the Roles chapter in the Sunflower Enterprise User Guide.

FINANCE MENU ACCESS

The Finance module uses two roles to manage finance assets. These two roles are the **Finance Manager** and **Finance Clerk**.

When assigning roles to users, it is important to map out the functional responsibilities of your users and then decided based on the tasks that each user must perform you will then be able to assign the appropriate application role. Below are a few guidelines that list the access to the menu items within the Finance module by the related Finance role.

MENU ITEM	ROLE	
	FINANCE MANAGER	FINANCE CLERK
Maintain Financial Assets	Yes	Yes
Financial Asset Summary and History	Yes	Yes
Asset Search	Yes	Yes
Maintain Catalog Entries*	--	--
Journal Event History	Yes	Yes
Record Uncapitalized Reason	Yes	Yes
Change Financial Asset Information	Yes	Yes
Maintain Financial Asset Ongoing Events	Yes	Yes
Create Financial Asset Final Events	Yes	Yes
Edit Financial Asset Interface Records	Yes	Yes
Process Financial Asset Interface Records	Yes	Yes
Process Financial Asset PO Interface Records	Yes	Yes
Edit Asset Value Component Interface Records	Yes	Yes
Capitalize Financial Assets	Yes	Yes
Adjust Capitalized Value	Yes	Yes
Transfer Capital Value	Yes	Yes
Maintain FY and Accounting Periods	Yes	
Maintain Ledger Batches	Yes	
Maintain Journal Entry Rules	Yes	
Maintain Journal Entry Templates	Yes	
Maintain Ledger Batch Assignments	Yes	
Maintain Asset Structures	Yes	Yes
Finance Reports	Yes	Yes

*Finance Clerks and Managers have access to the **Maintain Catalog Entries** screen if you assign them the AS_CATALOGER role.

SETUP FINANCIAL ASSETS

The main purpose of the Finance module is to track capital assets. Capital assets are assets that meet a certain set of criteria that require them to be tracked by the organization's financial system. Sunflower is flexible enough to track just about any event that may happen in the database and produce debits and credits for the subsidiary ledger. What gets placed into the subsidiary ledger depends on how the Finance module is set up. This section covers the setup configuration required to enable end users to work in the Finance module.

The initial setup of the Financial module includes:

- "Define a Carrier"
- "Define the Financial Calendar"
- "Create Ledger Batches"
- "Define Journal Entry Templates"
- "Define Journal Entry Rules"
- "Define Ledger Batch Assignments"

DEFINE A CARRIER

When working with financial assets, each capitalized asset is assigned to an organization that is responsible for *carrying* the capitalized value and associated accumulated depreciation on a Property, Plant & Equipment (PP&E) balance sheet. An organization that performs this role is known as a **Carrier**. This type of organization is specific to the Finance module, and is required to create financial assets and Journal Entry (JE) Templates. You can create a new carrier organization, or set up an existing one by adding the carrier organization type, as shown below.

A new Sunflower database has no Carrier organizations defined, so you must define at least one. Normally this is all you will ever need, unless you have multiple organizations using the same Sunflower database.

Scenario: The following graphic illustrates how to use the **Maintain Organizations** screen to define a new carrier or to update an existing carrier.

- NAVIGATION**
- Click Admin
 - Click Organization
 - Click Maintain Organizations

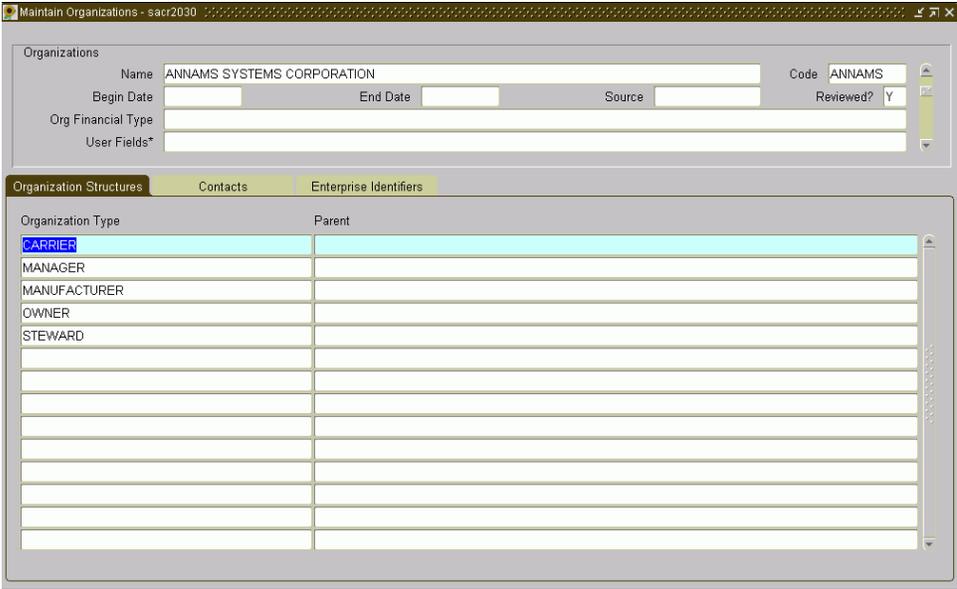


Figure 2-2: Defining Carriers

- Step 1.** Navigate to the **Maintain Organizations** screen.
- Step 2.** Click the **Find** icon to enter Query mode.
- Step 3.** Enter the desired steward organization.
- Step 4.** Click the **Find** icon to retrieve applicable data for the organization.
- Step 5.** Click the **Next Block** icon to place your cursor in the **Organization Structures** block.
- Step 6.** Place your cursor in the next available blank row.
- Step 7.** Enter or select *CARRIER* from the list of values.
- Step 8.** Click the **Save** icon to save the updated organization record.

DEFINE THE FINANCIAL CALENDAR

You must define the financial calendar, fiscal years, and accounting periods, within which financial transactions are captured. The start and end dates for the accounting periods defined with Sunflower should match the start and end dates for accounting periods defined by the general ledger's (GL) financial calendar. This is normally performed by the GL to Sunflower Assets interface. Each capitalized asset must also be associated with an accounting period. Accounting periods are set up according to the fiscal accounting periods used by your organization. Fiscal years for the Federal government typically run from October to September. Accounting Periods may or may not start and end with calendar months.

Sunflower is flexible enough to accommodate almost any accounting schedule. Some organizations may only report quarterly, in which case there would be four accounting periods for each year with each one spanning three months worth of time. Whatever an organization's financial accounting schedule is, there should not be any holes (days in a year not covered by an accounting period).

NOTE: Closing is performed by the general ledger (GL), not with Sunflower (a subsidiary ledger). The **Default Begin Date** and **Default End Date** fields are used to provide overlaps (1 month before & 1 month after the existing period), which are critical for transferring assets outside the normal window, especially for **Year End Close**.

Scenario: The following graphic illustrates how to use the **Maintain FY and Accounting Periods** screen to define a carrier's financial calendar.

NAVIGATION

- Click Finance
- Click Maintain FY and Accounting Periods

Name	Begin Date	End Date	Default Begin Date	Default End Date
XX SEP 2005	09/01/2005	09/30/2005		
XX AUG 2005	08/01/2005	08/31/2005		
XX JUL 2005	07/01/2005	07/31/2005		
XX JUN 2005	06/01/2005	06/30/2005		
XX MAY 2005	05/01/2005	05/31/2005		
XX APR 2005	04/01/2005	04/30/2005		
XX MAR 2005	03/01/2005	03/31/2005		
XX FEB 2005	02/01/2005	02/28/2005		

XX JAN 2005	01/01/2005	01/31/2005		
XX DEC 2004	12/01/2004	12/31/2004		
XX NOV 2004	11/01/2004	11/30/2004		
XX OCT 2004	10/01/2004	10/31/2004		

Figure 2-3: Setting Up Financial Calendars

Step 1. Navigate to the **Maintain FY and Accounting Periods** screen.

Step 2. Enter a name for the fiscal year in the **FY Defined by** field

Step 3. Enter a fiscal year ID in the **Identifier** field.

Step 4. Enter the start date for the fiscal year in the **Begin Date** field.

Step 5. Enter the end date for the fiscal year in the **End Date** field.

Step 6. Enter the month and year for each period of the fiscal year in the **Name** field.

NOTE: When you get to the bottom row, click the **Next Record** icon to continue adding the accounting periods.

Step 7. Enter the period start date in the **Begin Date** field of the **Accounting Periods** block.

Step 8. Enter the period end date in the **End Date** field of the **Accounting Periods** block.

Step 9. Click the **Save** icon to save the Financial Calendar.

Step 3. Leave the **Earliest Event** field blank. The **Earliest Event** field, indicates the earliest date and time a journal event can be included in a batch. This field is filled in automatically by the system.

Tip: If you leave the **Earliest Event** field blank, it defaults to the first day defined for the **Accounting Period**. This field enables you to specify a value so you can elect *not* to pick up all the journal entry lines for the entire **Accounting Period**.

Step 4. Enter the latest date and time a journal event can be included in the batch in the **Latest Event** field.

- Sunflower will not allow you to process a ledger batch with the **Latest Event** field set to the current date. This is because the current day is not over yet, and you don't want to send partial information to the accounting system. Normally, you will send an entire fiscal month at one time.
- If all the journal entry lines were created today, the ledger batch run won't pick anything up. Ideally, the batch should be run the day after the financial activity was created in order to produce output.

Step 5. Tab to the **Type** field (the screen will automatically scroll to the right), double-click and select **ACTIVITY**.

- The **Carrier** field displays the name of the organization with which the accounting period is associated. Sunflower populates this field automatically.
- The **FY** field displays the fiscal year with which the accounting period is associated. Sunflower populates this field automatically.
- Click the **OK** button to close the LOV.

Step 6. In the **User Fields** field, click the **Edit** button to enter information in user-defined fields, if you have extended this field.

- The **Processing Start** field displays the date and time the batch processing began. Sunflower populates this field automatically.
- The **Processing Stop** field displays the date and time the batch processing finished. Sunflower populates this field automatically.
- The **Ledger Batch Id** field displays the identifier of the ledger batch assigned by the system. Sunflower populates this field automatically.

Step 7. Click the **Save** icon.

Sunflower performs a check to make sure that the subsidiary ledger transactions are balanced. You cannot take an amount out of one account without offsetting this amount into another account. Sunflower issues an error message and stops the transaction if a template does not balance.

Ideally, the sum of all debits and the sum of all credits in a ledger batch should be zero. Just as the sum of the debits and credits for the journal entry lines of an individual journal event should sum to zero. If the sum off all debits and credits in a batch are zero, the entire batch is balanced.

DEFINE JOURNAL ENTRY TEMPLATES

Journal entry templates are used to map Sunflower attributes (which can include User Defined fields) to a GL account number. Journal entry templates determine the debits and credits that are created when a financial transaction is recorded by Sunflower. You must setup a journal event type for each kind of transaction that you want the system to create subsidiary ledger entries for, as each journal entry line generated *must* be tied back to a journal event of some type. Journal events are triggered by asset events. You must define the types of journal events that you want, and map them to actual asset events to produce them.

When an asset event of a particular type occurs, a check is made to see if it is associated with a journal event. If so, a journal event is automatically created as well, and journal entry lines produced according to the definitions contained in the journal entry line templates.

Scenario: The following graphic illustrates how to use the Maintain Journal Entry Templates screen to specify the asset types against which debits and credits will be posted to the general ledger. Create a new journal entry template for fabrications. Use FAB XX for the JE (Journal Entry) Identifier and FABRICATION XX for the “JE” Name.

- NAVIGATION**
- Click Finance
 - Click Maintain Journal Entry Templates

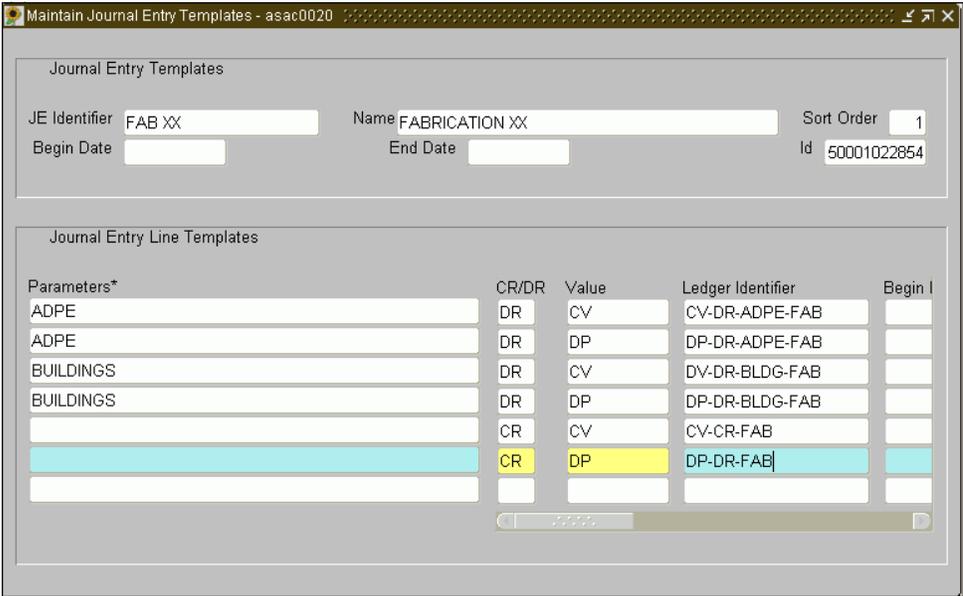


Figure 2-5: Defining Journal Entry Templates

- Step 1.** Navigate to the **Maintain Journal Entry Templates** screen.
- Step 2.** Specify an identifier for the template in the **JE Identifier** field.
- Step 3.** Specify a name of the journal entry template in the **Name** field.
- Step 4.** Enter the journal entry's relative order for when it is displayed on screens and reports in the **Sort Order** field.
- Step 5.** Enter the date that the template becomes valid in the **Begin Date** field.

Click the **List** button to display a calendar. If the template is always valid, leave this field blank.

Step 6. Enter the date that the template becomes invalid in the **End Date** field.

- Click the **List** button to display a calendar. If the template is always valid, leave this field blank.
- The **Id** field displays the journal entry template identifier assigned by the system.
- The field is entered automatically when you commit your changes to the database.

Step 7. Fill in the **Journal Entry Line Templates Parameters*** block as shown above.

- DR and CR specifies whether the GL account is debited or credited, and DP and CV stand for depreciation and capital value.
- In the **Value** column, you can specify NBV for net book value, if you want the subsidiary ledger to debit or credit that field in the financial system.

Step 8. Click the **Edit** button to enter journal entry line template information in the **Parameters*** field of the **Journal Entry Line Templates** block.

Step 9. Specify whether the journal entry line should be a credit or debit in the **CR/DR** field.

Step 10. Enter the journal entry line value's short name in the **Value** field. Click the **List** button for a list of **Value** names.

Step 11. Enter the identifier assigned to the general ledger account in the **Ledger Identifier** field.

If the user should be prompted for an account identifier at the time the journal entry is credited, leave the **Ledger Identifier** field blank.

Step 12. Click the **Validation** button to display the **Maintain Validation Definitions** screen.

- User-provided accounts require a validation definition to control user entry of ledger identifiers.
- Enter the characteristics of the user-provided account and click the **Save** icon to return to the **Maintain Journal Entry Templates** screen.

Step 13. Enter the date that the journal entry template becomes valid in the **Begin Date** field.

Click the **List** button to display a calendar. If the journal entry template is always valid, leave this field blank.

Step 14. Enter the date that the journal entry template becomes invalid in the **End Date** field.

Click the **List** button to display a calendar. If the journal entry template is always valid, leave this field blank.

Step 15. Enter the prompt to be displayed for user-provided accounts in the **Prompt** field.

Step 16. The **Id** field displays the journal entry line template identifier assigned by the system.

Sunflower automatically populates this field when you commit your changes to the database.

Step 17. Click the **Save** icon.

NOTE: To add debits and credits to an existing journal entry template, click the **Find** icon, enter the desired journal entry template identifier, and click the **Find** icon again. Set up journal entry templates as described above.

You have created a journal entry template, but there are no **Journal Entry Line Templates** associated with it. This method of grouping allows a set of journal entry line templates to be associated to more than one journal event type.

DEFINE JOURNAL ENTRY RULES

Sunflower needs to know which journal entry template to use when creating a journal entry. As mentioned before, there is no direct relationship between a journal entry type and a template, which allows the same template to be used by more than one journal entry type. Journal entry rules associate journal entry templates with journal events (e.g. financial transactions).

Scenario: The following graphic illustrates how to use the Maintain Journal Entry Rules screen to specify the journal entries that are created for each transaction. Associate the JE template FABRICATION XX with the journal event type FABRICATION XX.

NAVIGATION

- Click Finance
- Click Maintain Journal Entry Rules

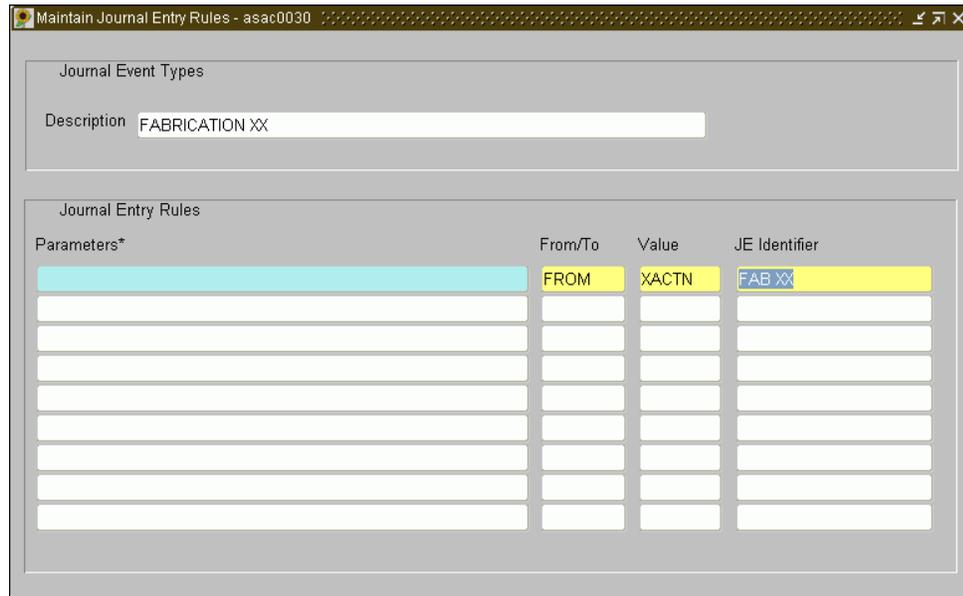


Figure 2-6: Defining Journal Entry Rules

Step 1. Navigate to the **Maintain Journal Entry Rules** screen.

Step 2. Enter the name of the journal event type in the **Description** field.

The **Journal Event Types** block specifies the journal event type to which the journal entry rules apply.

Step 3. In the **Parameters** field, click the **Edit** button to enter the user-defined parameters of the journal entry rule.

- The **Journal Entry Rules** block specifies the journal entry rules associated with a journal event type. The **From/To** field indicates whether the transfer is from or to an asset (only capital value transfer events will have a To value). Sunflower populates this field automatically.
- The **Value** field displays the value to be used by the journal entry rule.
- Click the **List** button for a list of possible values.

Step 4. Enter the name of the journal entry template in the **JE Identifier** field.

Click the **List** icon for a list of possible template names.

Step 5. Click the **Save** icon.

Step 1. Navigate to the **Maintain Ledger Batch Assignments** screen.

Step 2. Enter the ledger batch type's long name in the **Ledger Batch Type** field.

Click the **List** icon and select a name from the list.

Step 3. Enter the journal event type's long name in the **Journal Event Type** field.

Click the **List** icon and select a name from the list.

Step 4. Enter the date the ledger batch assignment becomes valid in the **Begin Date** field.

Click the **List** icon to display a calendar. If the ledger batch assignment is always valid, leave this field blank.

Step 5. Enter the date the ledger batch assignment becomes invalid in the **End Date** field,.

Click the **List** icon to display a calendar. If the ledger batch assignment is always valid, leave this field blank.

Step 6. Click the **Save** icon.

CREATE FINANCIAL ASSETS

Sunflower simplifies the process of creating and maintaining assets. As an asset management professional, you will often find the need to add individual assets to your property management system of record. Sunflower provides several screens and interfaces that simplifies the process of adding individual assets with or without purchase order information, updating asset information and transferring assets to and from your organization. For a general discussion about creating assets with Sunflower, see Chapter 1 "Create Inventory Assets" on page 6. This section focuses on creating finance assets with the Finance module.

MAINTAIN FINANCIAL ASSETS

The **Maintain Financial Assets** screen is an integral feature in Sunflower that is used frequently for the day-to-day management of financial assets. You can use the **Maintain Financial Assets** screen to create assets in an ad hoc manner. For example, you may want to track assets that your organization fabricates for custom applications. These assets were not purchased so there is no purchase order information to refer to when creating the asset records for the newly fabricated items. You can use the **Maintain Financial Assets** screen to create asset records for the fabricated items.

In addition, the **Maintain Financial Assets** screen enables you to update the descriptive information (e.g. **Location**, **Custodian**, and **Asset Condition**) for a financial asset or add a comment or picture. This screen is similar to the **Maintain Inventory Assets** screen. There are two types of financial assets; unclassified assets and identified assets.

Use the **Maintain Financial Assets** screen to:

- Create assets from scratch
- Modify asset details (e.g. custodian and location changes)
- Create unclassified assets, which are "place holders" against which financial transactions are recorded (e.g. **Intellectual Property**)
- Create identified assets, which are distinctly identified (e.g. **buildings, cranes**, etc.)

Scenario: The following graphic illustrates how to use the **Maintain Financial Assets** screen to create financial assets from scratch.

NAVIGATION

- Click **Finance**
- Click **Maintain Financial Assets**

Figure 2-8: Creating Maintain Financial Assets From Scratch

- Step 1.** Navigate to the **Maintain Financial Assets** screen.
- Step 2.** Enter the asset identifier for the financial asset you are about to create in the **Identifier** field.
- Step 3.** Enter the asset's information accordingly. For more information, see "Chapter 1 "Maintain Inventory Assets Field Terms" on page 10.
- Step 4.** Specify the asset type with either the **Unclassified Asset** or **Identified Asset** radio buttons.
- Step 5.** Click the **Save** icon to create the new financial asset.

CREATE ASSETS USING THE PO INTERFACE FEATURE

You can use the **PO Interface** feature to create assets from PO information received from a purchasing system feed into Sunflower Assets. The PO Interface feature enables you to create one or more assets based on a single PO line item, or you can create a single composite asset based on several PO line items from multiple purchase orders. For more information on using the PO Interface, see Chapter 9 "PO Interface" on page 563.

MASS ASSET CREATION

Sunflower provides two methods for creating multiple assets. You can use either the **Maintain Financial Assets Duplication** feature to create multiple asset records with similar information or if you have multiple assets on a single PO line item, you will find that using the **PO Interface Duplication** feature is a quick and easy way to create several assets at once.

These methods are covered in the Inventory Assets chapter. For more information on mass asset creation using the following methods, see:

- Chapter 1 "Maintain Inventory Assets - Duplication" on page 16
- Chapter 1 "PO Interface - Duplication" on page 18

VIEW FINANCIAL ASSET SUMMARY AND HISTORY

You can use the **Asset Summary and History** screen to perform a quick search of current and historical information for a single asset or a group of assets. The **Financial Asset Summary and History** screen provides a read-only view of any financial asset record available within the system. For more information about the Asset Summary and History screen, see Chapter 1 "View Inventory Asset Details" on page 22. and Chapter 1 "Asset Summary and History Field Terms" on page 27.

Scenario: The following graphic illustrates how to use the Financial Asset Summary and History screen to view the summary and/or historical details for a financial asset. View the summary details for financial assets F0140.

NAVIGATION

- Click **Finance**
- Click **Financial Asset Summary and History**

The screenshot displays the 'Financial Asset Summary and History' interface for asset F0140. The top section shows search criteria and asset identification fields. The main area is divided into 'Timeline' and 'Details' tabs, with 'Details' selected. A 'Details' section contains various fields for asset information, including Manufacturer (DELL), Model (D333), Serial Number (40101), Initial Event (PURCHASE), Asset Value (\$5,400.00), and Acquisition Date (04/01/1996). Below this is a 'Financial Interest Details' section with fields for Carrier (CARRIER 01), Current Cap Value (\$0.00), and Age/Life information.

Figure 2-9: Viewing Financial Asset Summary and History

To view the history of multiple assets, select the **Include History** checkbox and use the **Query Criteria** screen to search and retrieve one or more assets for which you can view the asset history based on the query selection criteria.

NOTE: Anywhere you see an **Asset Identifier** field, place your cursor in that field and click the **Summary and History** icon to view the summary and history information.

MANAGE FINANCIAL ASSETS

The Finance module facilitates the detailed tracking of the relationships between assets, organizations and people as they change over time. After acquiring assets, these assets will need to be assigned a location, a responsible party and organization for each asset. Sunflower enables you to maintain your finance assets by using several Finance module screens that update the attributes of your financial assets. Complimenting the **Maintain Financial Assets** screen are the supporting Finance module screens that enable the day-to-day management of your finance assets.

The following section illustrates several common finance tasks that you can perform in the Financial module to manage and track your financial assets.

- “Capitalize Financial Assets (Part I)” on page 173
- “Capitalize Financial Assets (Part II)” on page 175
- “Record Uncapitalized Reason” on page 177
- “Adjust Capitalized Value” on page 178
- “Transfer Capital Value” on page 180
- “De-Capitalize an Asset” on page 182
- “Reverse De-Capitalization of an Asset” on page 183
- “View Financial Transactions” on page 185

CAPITALIZE FINANCIAL ASSETS (PART I)

The **Capitalize Financial Assets** screen enables you to manipulate data associated with the capitalization of an asset. You can write on a new financial asset, write on an asset from another interest asset, and write on an asset with multiple funding sources.

Scenario: The following graphic illustrates how to use the **Capitalize Financial Assets** screen to capitalize your financial property records. The capitalization of an asset effectively writes the asset value to the balance sheet.

NAVIGATION

- Click **Finance**
- Click **Capitalize Financial Assets**

The screenshot shows the 'Capitalize Financial Assets' window with the following data:

Financial Assets		Type	Identifier
Identifier	FX40	Existing Interest Asset	
Mfr/Mdl/Official	DELL	D333	COMPUTER PERSONAL
Asset Type	ADPE	AUTOMATED DATA PROCESSING EQUIPMENT	
Initial Event	PURCHASE	User Fields*	PO178_1_2233
Journal Event	PURCHASE	Acquisition Date	04/01/1996
Carrier	ASSET CENTER XX	Period	XX JUN 2005
Activity Status	IN SERVICE	Activity Type	
Depreciation		Document*	SHIPPING_650
User Fields*			
Global User Fields*			

Split funded capitalization		Asset Value	User Fields*
ACQUISITION COST		\$5,400.00	

Page 2 Comment

Figure 2-10: Capitalize Financial Assets

- Step 1.** Navigate to the **Capitalize Financial Assets** screen.
- Step 2.** Enter the desired asset's identifier in the **Identifier** field, and press **Enter** to display the asset's information.

If the asset is funded by multiple funding sources, select the **Split funded capitalization** check box.

- Step 3.** If debits and credits are available, you can view them from the **Journal Entry Lookup** screen by clicking the **Journal Entry Lookup** icon to view.
- Step 4.** Click the **Exit** icon to return to the **Capitalize Financial Assets** screen.
- Step 5.** Click the **Save** icon.

CAPITALIZE FINANCIAL ASSETS (PART II)

Additionally, you can use the **Capitalize Financial Assets** screen to create and capitalize financial assets from **other** Interest (module) assets (i.e. Inventory Management, Agreement, etc.).

Scenario: The following graphic illustrates how to create and capitalize a financial asset from Inventory Asset XX41.

NAVIGATION

- Click **Finance**
- Click **Capitalize Financial Assets**

The screenshot shows a software window titled "Capitalize Financial Assets - asac2010 (Page 1 of 2)". The interface contains several input fields and a table. The "Initial Event" field is highlighted in yellow and contains the text "PURCHASE".

Financial Assets		
Identifier	Existing Interest Asset	Type Identifier
FXX41	INV	XX41
Mfr/Mdl/Official	D333	COMPUTER PERSONAL
DELL		
Asset Type	ADPE AUTOMATED DATA PROCESSING EQUIPMENT	
Initial Event	PURCHASE	User Fields* PO2233_1_223
Journal Event	PURCHASE	Acquisition Date 01/01/1998
Carrier	CARRIER XX	Period 2000-06-XX
Activity Status	IN SERVICE	Activity Type
Depreciation		Document*
User Fields*		
Global User Fields*		
<input type="checkbox"/> Split funded capitalization		
	Asset Value	User Fields*
ACQUISITION COST	\$6,700.00	

Page 2 Comment

Figure 2-11: Capitalize Financial Assets continued

Step 1. Navigate to the **Capitalize Financial Assets** screen.

Step 2. Enter the new financial asset identifier in the **Identifier** field.

This can be the same number as the existing asset identifier, or an entirely new designation; dependent upon your Business Practices.

Step 3. Select the interest type from the list of values (LOV).

The asset is an Inventory Management (Mgmt) asset.

Step 4. Enter the current asset identifier.

Step 5. Click **Save** to capitalize the asset.

Use the **Journal Entry Lookup** icon to view debits and credits for the capitalized asset.

RECORD UNCAPITALIZED REASON

At times, there will be assets that you will choose not to capitalize for one reason or another even though the asset's value meets the capitalization dollar threshold. The **Record Uncapitalized Reason** screen enables you to record the reason a financial asset has not been capitalized. This screen is helpful because it prevents assets from appearing on the **Asset to be Capitalized** report and serves as a reminder of the reason that an asset was not capitalized.

Scenario: The following graphic illustrates how to use the **Record Uncapitalized Reason** screen to define those assets that are not capitalized. Record uncapitalized reason for asset FXX45 which is experimental equipment and will not be capitalized.

NAVIGATION

- Click **Finance**
- Click **Record Uncapitalized Reason**
- Click **Record Financial Asset Uncapitalized Reason**

Ok Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/> FXX45	DELL	D333	COMPUTER PERSONAL
<input type="checkbox"/>			

Figure 2-12: Record Uncapitalized Reason

- Step 1.** Navigate to the **Record Financial Asset Uncapitalized Reason** screen.
- Step 2.** Specify the reason for not capitalizing the asset in the **Reason** field.
- Step 3.** Enter the asset identifier in the **Identifier** field and click the Tab key.
- Step 4.** Click the **Save** icon.

ADJUST CAPITALIZED VALUE

The **Adjust Capitalized Value** screen enables you to add or subtract value to or from an asset.

Scenario: The following graphic illustrates how to use the **Adjust Capitalized Value** screen to increase the capitalized value of asset FXX41 by \$250, because it received an upgraded CPU.

NOTE: Adjustments can also be performed in other modules (Agreement, Inventory, etc.); however, entering this type of cost value data in other modules **will not** create a Journal Entry input to the GL. In order to create JEs, you must use this **Finance** module form.

NAVIGATION

- Click Finance
- Click Adjust Capitalized Value

The screenshot shows the 'Adjust Capitalized Value' window for asset FXX41. The 'Current Capitalized Value' is \$6,700.00. The asset is identified as 'DELL D333' and is 'COMPUTER PERSONAL'. The 'Asset Type' is 'ADPE' (Automated Data Processing Equipment). The 'Journal Event' is set to 'ADJUSTMENT' with an 'Acquisition Date' of '01/01/1998'. The 'Carrier' is 'CARRIER XX' and the 'Activity Status' is 'IN SERVICE'. A table at the bottom shows an 'ACQUISITION COST' of '\$250.00'. A 'Comment' button is located at the bottom right of the form.

Asset Value	User Fields*
ACQUISITION COST	\$250.00

Figure 2-13: Adjust Capitalized Values

Step 1. Navigate to the **Adjust Capitalized Value** screen.

Step 2. Enter the asset identifier in the **Identifier** field.

Step 3. Select the journal event type from the list of values.

Step 4. Enter the adjusted value.

Enter a positive value for a write-up and a negative value (e.g. *-500*) for a write-down of asset value.

Step 5. Click the **Save** icon.

TRANSFER CAPITAL VALUE

The **Transfer Capital Value** screen provides the ability to transfer values of one asset to another asset of the same interest type. Use the **Transfer Capital Value** screen to transfer the financial asset value from one asset to another financial asset.

Scenario: The following graphic illustrates how to use the **Transfer Capital Value** screen to transfer value from one asset to another. Sunflower automatically creates the appropriate debits and credits that are required to keep the general ledger's balance sheet up-to-date. Record the transfer of capital value for a video card worth \$450 from asset FXX40 to FXX41.

NAVIGATION

- Click Finance
- Click Transfer Capital Value

Figure 2-14: Transferring Capital Value

- Step 1.** Navigate to the **Transfer Capital Value** screen.
- Step 2.** Enter the identifier that you want to transfer value to in the in the **Identifier** field of the **To** block.
- Step 3.** Select the appropriate event from the list of values in the **Journal Event** field.
- Step 4.** Select the appropriate asset's carrier.
- Step 5.** Enter the identifier that you want to transfer value from in the in the **Identifier** field of the **From** block.
- Step 6.** Enter the transfer value in the **Total Transfer Value** field.
- Step 7.** Click the **Comment** button to enter any comments relevant to this inventory asset value transfer transaction.
- Step 8.** Click the **Save** icon to complete the transfer of value to the selected inventory asset.

Use the **Journal Entry Lookup** icon to examine the debits and credits created by this transfer of value transaction.

DE-CAPITALIZE AN ASSET

Use the **Create Asset Final Events** screen to de-capitalize an asset and remove its capital value from the balance sheet.

Scenario: The following graphic illustrates how to use the **Create Asset Final Events** screen to de-capitalize asset FXX41 which has been transferred to the U.S. Air Force on MM/DD/YYYY.

NAVIGATION

- Click **Finance**
- Click **Create Financial Asset Final Events**

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	FXX41	DELL	D333	COMPUTER PERSONAL
<input type="checkbox"/>				

Figure 2-15: Creating Asset Final Events (De-Capitalize)

- Step 1.** Navigate to the **Create Financial Asset Final Events** screen.
- Step 2.** Enter the final event type in the **Event Type** field of the **Final Events** block.
- Step 3.** Enter the appropriate asset center in the **Carrier** field.
- Step 4.** Specify the date of transfer in the **Date** field.
- Step 5.** Select the event type from the list of values in the **Final Event** field.
- Step 6.** Enter the identifier of the asset being transferred (de-capitalized) in the **Asset Identifier** field.
- Step 7.** Click the **Save** icon.

REVERSE DE-CAPITALIZATION OF AN ASSET

Use the **Create Asset Final Events** screen to reverse the de-capitalization of an asset at any time by reversing the final event. Alternately you can also perform a reinstatement by entering the asset identifier on the **Maintain Financial Assets** screen.

Scenario: The following graphic illustrates how to reverse the de-capitalization of the asset, FXX41.

NAVIGATION

- Click Finance
- Click Create Financial Asset Final Events

Final Events					
Date	05/18/2005		Carrier		
Final Event	TRANSFER		Period		
User Fields*	U.S. AIR FORCE		Journal Event		
Document*					

Assets				
Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	FXX41	DELL	D333	COMPUTER PERSONAL
<input type="checkbox"/>				

Message

Figure 2-16: Reverse De-Capitalization of an Asset

- Step 1.** Navigate to the **Create Financial Asset Final Events** screen.
- Step 2.** Specify the date of the asset final event (the initial de-capitalization). The current date is the default value.
- Step 3.** Select the event type from the list of values (LOV) from the **Asset Final Event** field for the inventory asset. In this case, the asset final event type is a transfer.
- Step 4.** Click the **Find** icon to search the database.
- Step 5.** Place cursor in the **Identifier** field for the asset that you want to reverse.
- Step 6.** Click the **Remove Record** icon to remove the specifically indicated asset record.
- Step 7.** Click the **Save** icon to reverse the de-capitalization of the selected asset.

NOTE: You can also reinstate a retired asset using the **Maintain Financial Assets** screen by entering the retired asset identifier in the **Identifier** field. A prompt message informs you that this action will re-activate the asset, thereby reinstating the asset.

VIEW FINANCIAL TRANSACTIONS

Use the **Journal Event History** screen to view the financial transactions and the associated debits/credits for an asset at any point in time.

Scenario: The following graphic illustrates how to use the **Journal Event History** screen to review the financial transactions and its associated debits/credits for a financial asset.

NAVIGATION

- Click **Finance**
- Click **Journal Event History**

The screenshot shows the 'Journal Event History - asac2050' window. It contains a form for asset details and a table of journal events.

Asset Details:

- Financial Assets: Include Depreciation Events
- Identifier: FIN FX041 Financial Asset Identifier: FX041 Asset #: 1
- Mfr/Mdl/Official: DELL D333 COMPUTER PERSONAL
- Asset Type: ADPE AUTOMATED DATA PROCESSING EQUIPMENT
- Acquisition Date: 01/01/1998
- Age/Life: 2,725.00 1,080.00 Days Current Cap Value: \$7,400.00
- Age/Life (Years): 7.57 3.00 Years Depreciation: \$0.00
- Carrier: ASSET CENTER XX Net Book Value: \$7,400.00
- User Fields: (empty)
- Global User Fields: (empty)

Journal Event History Table:

Journal Event	Created	By	Resulting Cap Value	Document
REVERSE DECAPITALIZATION	06/18/2005 23:11:13	MANAGER TRAINER FIN	\$7,400.00	
TRANSFER	06/18/2005 20:29:41	MANAGER TRAINER FIN	\$0.00	
CAPITAL VALUE TRANSFER	06/18/2005 20:21:25	MANAGER TRAINER FIN	\$7,400.00	
ADJUSTMENT	06/18/2005 20:04:25	MANAGER TRAINER FIN	\$6,950.00	
PURCHASE	06/18/2005 18:26:57	MANAGER TRAINER FIN	\$6,700.00	

JE lines

Figure 2-17: Viewing Financial Transactions

Step 1. Navigate to the **Journal Event History** screen.

Step 2. Enter an asset identifier in the **Identifier** field and click the Tab key to retrieve your data.

FINANCIAL (CAPITAL) ASSET REPORTS

Sunflower provides a flexible and comprehensive web-based reporting system. The Sunflower database is queried when a report is created and executed. Reports display real-time information. Therefore, an afternoon report will differ from a morning report by reflecting any changes made during the day.

There are several output options available for your reports.

- PDF (Adobe Acrobat)
- HTML
- Text

Your outputs depend upon the report selected. Acrobat and HTML are standard options provided for most reports. Text file export is available for selected reports.

Sunflower provides the following reports to use with the Finance module:

- **Journal Activity** - the detailed debits and credits for a selected set of financial assets, for a time period.
- **Balance Summary** - shows subsidiary ledger balance summaries for a selected set of financial assets, for a time period.
- **Balance Detail** - shows subsidiary ledger balance details for a selected set of financial assets, for a time period.
- **Journal Entry Rule Definition** - shows the details of the journal entry rules which are used to generate financial transactions.
- **Journal Entry Template Definition** - shows the details of the journal entry templates which are used to generate financial transactions.
- **Assets to be Capitalized** - shows assets whose value exceeds the capitalization threshold that are awaiting capitalization.
- **Financial Assets Requiring a Final Event** - show financial assets with no other associated active interest assets of a chosen type (this condition indicates that an accountable asset has been retired but still requires approval for decapitalization).
- **Ledger Batch Processing Results** - shows the results of sending a ledger batch (group of financial transactions) to the ledger.
- **Financial Assets (Global Information)** - shows detail and summary information of financial assets i.e. capital assets.

- **Financial Assets Ongoing Events** - shows detailed information for ongoing events, e.g. maintenance, repairs and mileage captured, for financial assets for a time period.
- **Financial Asset Interface Processing Results** - shows the results of processing the contents of interface table as_load_financial_assets.
- **Asset Search** - searches the asset repository for assets matching a description, manufacturer or model; used for asset review.
- **Asset Structure** - shows parent/child relationships between assets.
- **Purchase Order Aging Report** - shows detailed information of outstanding purchases orders requiring receipt and tagging of property.
- The **Financial Asset Timeline** report displays the event timeline of finance assets over a time period.



AGREEMENTS

The Agreements module enables you to manage the assets assigned to agreements, (e.g. leases and subcontracts) between your organization and external organizations. You can also create intra-organizational agreements and track the activity status of each asset associated with an agreement using an extensive menu of reporting functions. This chapter places strong emphasis on the setup of agreements and agreement assets for the on-going management of assets with contractual ties.

KEY CONCEPTS

This chapter will include the following discussion points and concepts:

- “About Agreements and Agreement Assets”
- “Agreement Roles”
- “Agreement Setup”
- “Create Agreements”
- “Create Agreement Assets”
- “Maintain Agreements”
- “Maintain Agreement Assets”
- “Inactivate Agreement Assets”
- “Retire Agreement Assets and Agreements”
- “Excess Agreement Assets”
- “Agreement Reports”

ABOUT AGREEMENTS AND AGREEMENT ASSETS

One of the primary tasks of contract management is the creation and maintenance of agreements and agreement assets. Sunflower enables you to record the creation and capture the events of an agreement asset throughout its lifecycle. From creation to retirement of an agreement asset, you can easily manage and oversee your organization's vast and diverse asset base. You use the Sunflower Agreement (Agree) module to record the creation and capture the events of an agreement asset throughout its lifecycle. From creation to retirement of an agreement asset, you are able to easily manage and oversee your organization's vast and diverse asset base.

The Sunflower Agreement module captures information needed by contract managers during the initial phases of an agreement by tracking and tagging assets as they become associated with an agreement. There are many benefits you can enjoy by using the Agreement module to manage your contracts. For example, you can associate your assets to agreements such as a subcontract or a defense contract as well as move, transfer or dispose of a group of assets at the agreement level. In addition, the Agreements module supports the reporting of asset activity for standard government reports such as the Department of Defense's DD1662 and NASA's NF1018. With the Agreements module, you can monitor and retrieve asset information that enable you to create insightful agreement asset activity reports. The Agreements module manages assets associated with both formal and informal contracts that include:

- Subcontracts
- Leases
- Warranties
- Software License Agreements
- Property Passes
- Loans and Borrows

The following sections discuss and illustrates Sunflower Assets Agreements module expansive contract management capacity.

AGREEMENT MODULE WORKFLOW

The Agreement module handles three primary functions: creation, management and disposal of assets. The workflow diagram below depicts this process based on the menu items found within the Agreement module that will help you to obtain your desired objective(s).

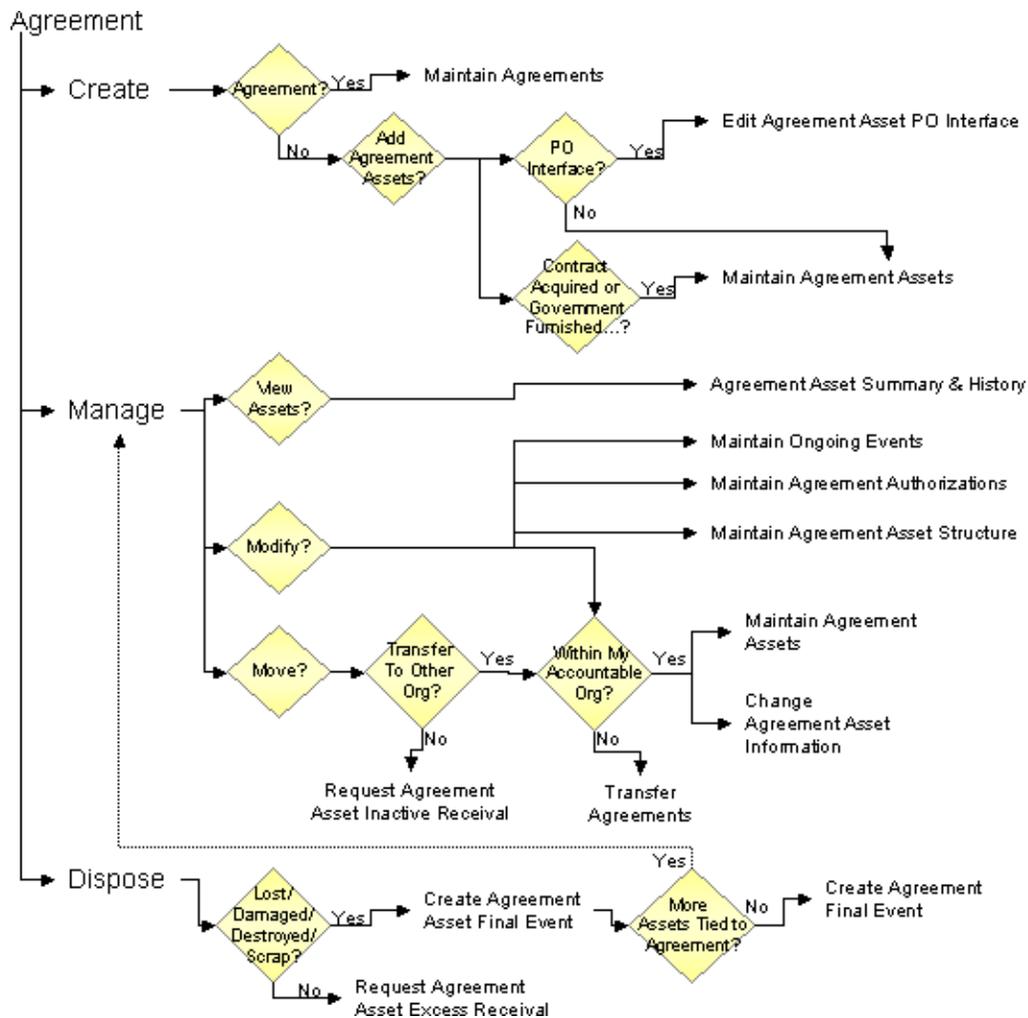


Figure 3-1: Agreement Module Workflow

AGREEMENT ROLES

Sunflower approaches asset management with the belief that you can manage, monitor, control, and account for an asset throughout its distinct lifecycle. Sunflower does not impose the way in which you have to manage your assets but provides guidelines, structures, processes, and tools to help you manage them effectively. The users that you assign to manage the various aspects of an asset at each stage of the lifecycle will depend upon your organizational structure and processes.

A Sunflower user is any individual to whom you assign one or more roles. The assignment of Sunflower roles enables users to perform job duties that are enabled by the specified role. Roles provide access to screens and define the extent to which an individual can perform functions such as adding, updating, and retiring asset records. The user in question may be an employee or a contractor working on the behalf of your organization who has a job function that requires either active (e.g. create, update or delete functions) or passive (e.g. general inquiry, searching and reporting) use of menu items in the Agreements module.

Sunflowers' agreement roles include Agreement Managers and Agreement Clerks. Depending upon your organizational structure, you may find that in a small, or centralized organization, you assign most of the users as Managers responsible for performing all or many of the tasks related to contract management with a small number of users assigned as Agreement Clerks to carry out the daily business process.

Whether you choose to assign a user as a manager or a clerk will depend upon the limitations that you wish to impose on that user. For example, you may choose to assign one user who is only responsible for specific agreements, whether in quantity or type, a limited role (e.g. Agreement Clerk) within the application versus another user who has a greater level of responsibility and who manages all agreements within the system (e.g. Agreement Manager). Refer to "Agreement and Contract Menu Access" on page 193 to view the menu items that are accessible to each agreement role.

AGREEMENT AND CONTRACT MENU ACCESS

When assigning roles to users, it is important to map out the functional responsibilities of your users and decide based on the tasks that each user must perform how to assign the appropriate application role. The table below lists menu access within the Agreement and Contract modules based upon the related Agreement module roles.

MENU ITEM	ROLE	
	AGREEMENT MANAGER	AGREEMENT CLERK
Maintain Agreement Assets	Yes	Yes
Agreement Asset Summary and History	Yes	Yes
Asset Search	Yes	Yes
Maintain Catalog Entries	Yes	--
Change Agreement Asset Information	Yes	Yes
Transfer Agreements	Yes	Yes
Transfer Agreements Asset Value	Yes	Yes
Maintain Agreement Asset Ongoing Events	Yes	Yes
Create Agreement Asset Final Events	Yes	Yes
Edit Agreement Asset Interface Records	Yes	Yes
Process Agreement Asset Interface Records	Yes	Yes
Process Agreement Asset PO Interface Records	Yes	Yes
Edit Asset Value Component Interface Records	Yes	Yes
Maintain Agreements	Yes	Yes
Maintain Agreement Authorizations	Yes	--
Maintain Asset Structures	Yes	Yes
Agreement Reports	Yes	Yes
Maintain DD 1662Reports	Yes	Yes
Maintain NF1018 Yearly Reports	Yes	Yes
Maintain NF1018 Monthly Reports	Yes	Yes
Maintain Government Report Header	Yes	Yes
Contract Reports	Yes	Yes

In addition, the Agreement Manager has access to several Administration module screens that are necessary for the setup up of the Agreement module to manage and report on assets according to your organization's business processes. The Agreement Manager also has access to Administration module screens that are specific to the setup of Sunflower Contract Reports so that government reports can be generated according to NASA and DoD reporting requirements.

AGREEMENT MANAGER VS. AGREEMENT CLERK

What is the difference between the clerk and manager roles? You can tell from the table above that both roles have almost the same type of access within the Agreement module. The difference between the two roles is only apparent when you take into account your organizational structure. The Agreement Manager has access to and can manipulate (create, update, and retire) agreement assets throughout the organization. The Agreement Clerk has the same capabilities as that of the Agreement Manager but only for those agreements to which the clerk is assigned. There is a separation of responsibility between these roles based on the concept of Organization Contacts.

In addition to the access granted by Sunflower user roles, the **Maintain Agreement Authorizations** screen enables you to specify precisely a user's access to specific contracts or contract types for updates and edits of agreements and agreement assets. For more information on how to use the **Maintain Agreement Authorizations** screen, see "Create Authorized Users" on page 198.

AGREEMENT MANAGER

The Agreement Manager has the ability to manage (e.g. create, modify, retire) all agreement assets within the Sunflower Agreement module. The Agreement Manager role controls all of the activities within the realm of asset management providing them complete access and control within the Agreement module. Additionally, the Agreement Manager is responsible for general administration tasks such as the definition and maintenance of list of values for agreement assets. The major tasks that an Agreement Manager role can perform are as follows:

- Create Agreements
- Create Agreement Assets
- Define Organizations
- Assign Steward Contacts

NOTE: You cannot assign Agreement Managers as steward contacts within the Sunflower Agreement module.

AGREEMENT CLERK

The Agreement Clerk can perform the same actions as the Manager but only for those assets within the organizations (including any child organizations) that the Clerk has been assigned to as a steward contact.

AGREEMENT SETUP

The Agreement module requires the following setup before you can use the Agreement module to manage and report on your contractual assets.

- “Create Agreement Types” on page 195
- “Create Authorized Users” on page 198
- “Create Agreement Asset Sources” on page 201
- “Maintain Valid Agreement Asset Classifications” on page 204

If you are working with Sunflower Contract Reports, there are additional setup steps to implement in order to create government reports. For more information on the setup required for using Sunflower Contract Reports, see the Contract Reports chapter of the Sunflower Enterprise Administration Guide.

CREATE AGREEMENT TYPES

Before you can create agreements, you must setup the supporting infrastructure that your agreements will use going forward. Agreement types are set up in the Administration module as a domain. Agreement types are just that, types of agreements that your organization commonly enters into with other organizations. In order to create agreements and tie assets to those agreements, you must define agreement types to make them available as choices for the type of agreements that you use for your organization.

If you are using Sunflower Contract Reports, you will need to create the agreement type or types that supports this functionality. For example, if you are supporting a DoD contract, you will want to create an agreement type that will help you build a DD1662 report. You can call it Defense Contract or DD1662 or whatever your business process dictates as long as it makes sense to you. The agreement type enables you to limit the selection of asset sources and their related asset classifications to terms that support your business process. In the case of government reporting, many of these terms are strictly dictated. Sunflower Contract Reports enables you to set up these sources and classifications to support your agreement types. You can deliberately track your assets for the appropriate category to support your unique reporting needs.

Scenario: The following graphic illustrates how to use the Administration module Maintain Domains screen to define Lease, Defense and NASA Agreement Types..

NAVIGATION

- Click Admin
- Click Domains
- Click Maintain Domains
- Select the Domain Agreement Type

The screenshot shows a window titled "Maintain Domains - saad0010". The "Domains" section has a "Name" field containing "AGREEMENT TYPE". The "Values" section contains a table with the following data:

Id	Code	Description	Begin Date	End Date
50001022097	DEF	DEFENSE		
50001021043	LEASE	LEASE		
50001022098	NASA	NASA		

Figure 3-2: Creating Agreement Types

Step 1. Navigate to the **Maintain Domains** screen and select the *Agreement Type* domain.

To select the *Agreement Type* domain, place the cursor in the **Name** field, click the **Find** icon and click the **Next Record** icon until you select the *Agreement Type* domain.

Step 2. Enter the agreement types that you want to use when creating your agreements in the **Values** block by entering a short name in the **Code** column and a long name in the **Description** column.

Step 3. Enter the date that an agreement type becomes active in the **Begin Date** field.

Providing a **Begin Date** is optional. If the agreement type is always valid, leave this field blank.

Step 4. Enter the date that an agreement type becomes inactive in the **End Date**.

Providing an **End Date** is optional. If the agreement type is always valid, leave this field blank. If the agreement type is always valid, leave this field blank. If a hard-set end date for an agreement type must be defined, use this field to enter that date. This will prevent agreements from using this agreement type beyond the specified date.

Step 5. Click the **Save** icon to save the agreement types.

Warning: Applying an **End Date** to a selected domain value prevents that value from being available as a selection for any screen using the specified domain in the application once the **End Date** is reached.

CREATE AUTHORIZED USERS

Use the **Maintain Agreement Authorizations** screen to authorize personnel to work with agreements and agreement assets (addition, modification, or retirement of agreement assets). This screen enables you to authorize personnel to work with specific agreement types or specifically identified agreements. The following example illustrates how to assign authorization for a specific agreement and to a group of agreements.

ASSIGN AUTHORIZATION TO MANAGE AGREEMENTS BY TYPE

Scenario: The following graphic illustrates how to use the **Maintain Authorizations** screen in order to assign a user, Susan XX Smith - the lease administrator for your organization, the authority to manage and administer all leases.

NAVIGATION

- Click Agree
- Click Maintain Agreement Authorizations

Identifier	Last Name*	First	Mid
SSXX	SMITH	SUSAN	XX
Agr Type	LEASE	- OR -	
Agr Type		- OR -	
Agr Type		- OR -	
Agr Type		- OR -	
Agr Type		- OR -	

Figure 3-3: Authorizing Users to Administer Agreements by Agreement Types

- Step 1.** Navigate to the **Maintain Agreement Authorizations** screen.
- Step 2.** Enter the identifier (e.g. badge number or employee number) of the person that you are authorizing to work with agreements in the **Identifier** field.
- If you do not know the identifier, you can enter their last name in the **Last Name** field and press **Enter** to display a list of people with the same last name. If you click the **List** icon in an empty name field, Sunflower lists all available names from the **SA_PEOPLE** table.
 - To narrow your selection, type the first few letters of the last name and click the **List** button to return only those names with the same letter combination. Select the name that you are searching for from the list and click **OK** at the bottom of the screen to return the name to the **Maintain Agreement Authorizations** screen.
- Step 3.** Use one of the options listed below to assign authorization.
- To authorize an individual to administer agreements by *type*, enter the agreement type you wish to assign to the individual in the **Type** field. Refer to Figure 3-3: Authorizing Users to Administer Agreements by Agreement Types.
 - To authorize an individual to administer an agreements, tab past the **Type** field to the **Agreement Identifier** field (adjacent to **-OR-**) to designate the specific agreement.
 - To authorize an individual to administer *multiple* agreements, enter multiple rows (by specifying one agreement per row) for a designated user(s). This process is similar to defining a single agreement authorization, however, in this instance you will specify multiple rows for a user(s). Refer to Figure 3-4: Authorizing Users to Administer Agreements by Identifiers.
- Step 4.** Click the **Save** icon to save the authorization(s).

ASSIGN AUTHORIZATION TO MANAGE SPECIFIC AGREEMENTS

Here is an example that shows you how to authorize an individual to administer several specific agreements defined by **Agreement Identifier** (and not **Agreement Type**).

Scenario: The following graphic illustrates how to give a user authority to manage five different agreements by assigning each agreement identifier to the user. In this example, Brian XX Waters, an administrator for your organization, has been authorized to work with the lease agreements 2000-01-01, 2000-02-01, 2000-03-01, 2000-04-01 and 2000-05-01.

NAVIGATION

- Click Agree
- Click Maintain Agreement Authorizations

The screenshot shows a window titled "Maintain Agreement Authorizations - asag2030". The window contains a table with the following data:

Identifier	Last Name*	First	Mid	Agr Type	- OR -	Agreement ID	Agreement Type
BWXX	WATERS	BRIAN	XX			2000-01-01	LEASE
BWXX	WATERS	BRIAN	XX			2000-02-01	LEASE
BWXX	WATERS	BRIAN	XX			2000-03-01	LEASE
BWXX	WATERS	BRIAN	XX			2000-04-01	LEASE
BWXX	WATERS	BRIAN	XX			2000-05-01	LEASE

Figure 3-4: Authorizing Users to Administer Agreements by Identifiers

CREATE AGREEMENT ASSET SOURCES

Another required step to support the Agreements module is the setup of **Agreement Asset Sources**. An agreement asset source defines the ways in which you can receive assets for use within your organization. There are two designated Agreement Asset Sources used to support government contracts called **Contractor Acquired Property** and **Government Furnished Property**.

- **Contractor Acquired Property** - is property acquired, or otherwise provided by the contractor (to which the Government has title), for performing work on a contract.
- **Government Furnished Property** - is property in the possession of, or acquired directly by, the Government and subsequently made available to a contractor.

Sunflower does not limit your choice of agreement asset sources or impose a business process for managing your agreements and agreement assets. You can create any number and designations of agreement asset

NOTE: The definition of agreement asset sources does not occur within the Agreements module but in the Administration (Admin) module. The creation or modification of agreement asset sources may be defined by either an Administrator or an Agreement Manager.

Scenario: The following graphic illustrates how to create agreement asset sources. In this example two agreement asset sources are created, one for Contractor Acquired Property and one for Government Furnished Property.

NAVIGATION

- Click Admin
- Click Domain
- Click Maintain Domains
- Specify Agreement Asset Source Domain

The screenshot shows a window titled "Maintain Domains - saad0010". It has two main sections: "Domains" and "Values".

In the "Domains" section, there is a "Name" field containing the text "AGREEMENT ASSET SOURCE".

In the "Values" section, there is a table with the following data:

Id	Code	Description	Begin Date	End Date
50001021046	ACQ	CONTRACTOR ACQUIRED PROPERTY		
50001021045	GFP	GOVERNMENT FURNISHED PROPERTY		

Figure 3-5: Creating Agreement Asset Sources

- Step 1.** Navigate to the **Maintain Domains** screen.
- Step 2.** Click the **Find** icon to enter query mode and click the **Find** icon again to execute the query.
- Step 3.** Specify *Agreement Asset Source* as the domain in the **Name** field.
- Step 4.** Enter agreement asset sources that you want to use when creating your agreements in the **Values** block by entering a short name in the **Code** column and a long name in the **Description** column. In this case, *Contractor Acquired Property* and *Government Furnished Property*.
- Step 5.** Add rows as needed to accommodate the number of required agreement asset sources.
- Step 6.** Enter a date that an agreement asset source becomes active in the **Begin Date** field.
- Providing a **Begin Date** is optional. If the agreement asset classification is always valid, leave this field blank.
- Step 7.** Enter an a date that an agreement asset source becomes inactive in the **End Date** field.
- Providing an **End Date** is optional. If the agreement asset classification is always valid, leave this field blank.
- Step 8.** Click the **Save** icon to save your agreement asset sources to government source mappings.

As you create agreement assets, you will use the following designations as a list of values for the agreement asset source field on the **Maintain Agreement Assets** screen and to determine the choices available on the **Maintain Agreements Valid Asset Sources** screen to define the types of assets that may be applied to an agreement. For more information about the **Maintain Agreements Valid Asset Sources** screen, see “Specify Valid Agreement Asset Sources” on page 211.

MAINTAIN VALID AGREEMENT ASSET CLASSIFICATIONS

After specifying your agreement asset sources and agreement asset classifications, assign (map) agreement asset classifications to your agreement types. The **Maintain Valid Agreement Asset Classifications** screen enables you to make these assignments. This mapping, of agreement asset classifications to agreement types, limits your choices to those that support your business practices when creating agreement assets. In other words, agreement asset classifications provide a way to classify agreement assets according to the property classification that appear on government reports. The list of agreement asset classifications is configurable.

Scenario: The following graphic illustrates how to assign agreement asset classifications to an agreement type. In this example, we are mapping Agreement Asset Classifications to a Defense Agreement Type.

NAVIGATION

- Click Admin
- Click Domain
- Click Maintain Valid Agreement Asset Classifications

Code	Description	Begin Date	End Date
APP	AGENCY-PECULIAR		
IPE	INDUSTRIAL PLANT EQUIPMENT DOD		
LAND	LAND		
MATERIAL	MATERIAL		
OPE	OTHER PLANT EQUIPMENT DOD		
ORP	OTHER REAL PROPERTY DOD		
STE	SPECIAL TEST EQUIPMENT		
TOOL	SPECIAL TOOLING		

Figure 3-6: Mapping Agreement Asset Classifications to Agreement Types

- Step 1.** Navigate to the **Maintain Valid Agreement Asset Classifications** screen.
- Step 2.** Select the agreement type that you want to assign valid agreement asset classifications for in the **Type** field. Alternatively, you can click the **Find** icon and then click the **Next Record** icon until you retrieve the desired agreement type.
- Step 3.** Select the short name of the agreement asset classification in the **Code** field. The rest of the fields automatically populate with the associated agreement asset classification information.
- Step 4.** Add rows as needed to assign the agreement asset classifications that support the agreement type.
- Step 5.** Enter a date that an agreement asset classification becomes active for an agreement type in the **Begin Date** field.
- Providing a **Begin Date** is optional. If the agreement asset classification is always valid, leave this field blank.
- Step 6.** Enter a date that an agreement asset classification becomes inactive for an agreement type in the **End Date** field.
- Providing an **End Date** is optional. If the agreement asset classification is always valid, leave this field blank.
- Step 7.** Click the **Save** icon to save your agreement asset classifications to agreement type mappings.

CREATE AGREEMENTS

Use the Agreements module to manage and track assets that are tied to contracts, received as a part of government furnished property or on loan to individuals outside of your organization. Similarly, you can use the Agreement module to track any assets that are loaned to your organization from an external organization. The process begins with a request from an external organization for an asset. When one organization agrees to loan out the asset to another external organization, an agreement is created to specify the terms of the agreement and the assets associated with the asset to fulfill the agreement.

Before you can associate assets to an agreement you must first create an agreement. An agreement enables you to specify the logistical and contractual information between organizations where an agreement can be thought of as a basket to which you can add assets to borrow from or loan to another organization. This section describes and illustrates how to define an agreement which includes how to:

- “Specify Agreement Parties”
- “Specify Agreement Contacts”
- “Specify Valid Agreement Asset Sources”
- “Specify Agreement Modifications”
- “Specify Agreement Authorizations”
- “Store Agreement Text”

SPECIFY AGREEMENT PARTIES

Use the **Maintain Agreements** screen to define the parameters of an agreement. The buttons on the Maintain Agreements screen enable you to provide additional details for the agreement.

Scenario: The following graphic illustrates how to specify parties to an agreement. Asset Center XX has entered into a lease with Acme Resources; the new contract has been assigned number 2000-XX-01. The contract began on July 1, 2000 and is expected to run for one year. Acme Resources will be using government furnished property and contractor acquired property on the contract. Human Resources will act as the sponsor of the contract.

NAVIGATION

- Click **Agree**
- Click **Maintain Agreements**

The screenshot shows a web application window titled "Maintain Agreements - asag2020 (Page 1 of 6)". The main content area is titled "Agreements" and contains the following fields:

- Identifier: 2000-XX-01
- Type: LEASE
- Parent Identifier: (empty)
- Type: (empty)
- Begin Date: 07/01/2005
- Scheduled End Date: 07/01/2006
- End Date: (empty)
- Agr User Fields*: (empty)

Below these fields are two sections for party information:

- Entered into by:**
 - Organization: ASSET CENTER XX
 - Sponsor: HUMAN RESOURCES
- Entered into with:**
 - Organization: ACME RESOURCES
 - Or Person: (empty)
 - Last Name*: (empty)
 - First: (empty)
 - Mid: (empty)

At the bottom of the form are several buttons: Contacts, Valid sources, Mgdifications, authoriZed, aSsets, and Text.

Figure 3-7: Specifying Agreement Parties

- Step 1.** Navigate to the **Maintain Agreements** screen.
- Step 2.** Enter the agreement identifier in the **Identifier** field for the new agreement. In this example, the agreement identifier is *2000-XX-01*.
- Step 3.** Select the agreement type from the **Type** field. In this case, the agreement type is *Lease*.

- Step 4.** The **Parent Identifier** and the related **Type** fields are primarily used for sub-contracts.
- Step 5.** Enter the start date for the agreement in the **Begin Date** field.
- Step 6.** Enter the anticipated end date of the agreement in the **Scheduled End Date** field. If the agreement is open ended, you can leave this field blank. In this example, the scheduled end date is *07/01/2006*.
- Step 7.** Enter the actual **End Date** of the agreement when an agreement concludes. Leave blank until that time. This action prevents you from adding assets to the agreement once the **End Date** is reached.
- Step 8.** Specify the internal organization that is party to the agreement and the asset center that is the sponsor of the agreement in the **Entered into by** block. In this case, the internal organization is *ASSET CENTER XX* and their sponsor is *Human Resources*.
- Step 9.** Specify the external organization for the agreement in the **Organization** field of the **Entered into with** block. In this example, the organization, (*ACME Resources*), is the external party to the agreement. If the external party to the agreement is a person and not an organization, leave the **Organization** field blank and enter the name of the person with which the agreement is entered.
- Step 10.** Click the **Save** icon to save your new agreement.

SPECIFY AGREEMENT CONTACTS

Contact information is an important part of every agreement. Contacts are the people who have responsibility under this agreement. Click the **Contacts** button to define internal and external contacts of an agreement.

Scenario: The following graphic illustrates how to define internal and external contacts (or parties) for an agreement. In this example, Joe Anderson is the internal contact that initiated the agreement. Ann Davis is the internal contact agreement administrator and Carl Miller is the internal contact property administrator. John Cooper is the external contact agreement administrator and Susan Jones is the external contact property administrator.

NAVIGATION

- Click Agree
- Click Maintain Agreements
- Click Contacts button

The screenshot shows a web application window titled "Maintain Agreements - asag2020 (Page 2 of 6)". The window is divided into two main sections: "Internal Contacts" and "External Contacts".

Internal Contacts:

Initiated By	44A409	Last Name*	ANDERSON	First	JOE	Mid	<input type="checkbox"/>
Agr Admin		Last Name*	DAVIS	First	ANN	Mid	<input type="checkbox"/>
Prop Admin		Last Name*	MILLER	First	CARL	Mid	<input type="checkbox"/>

External Contacts:

Initiated By		Last Name*		First		Mid	<input type="checkbox"/>
Agr Admin	XX2005	Last Name*	COOPER	First	JOHN	Mid	<input type="checkbox"/>
Prop Admin	01	Last Name*	JONES	First	SUSAN	Mid	01

Figure 3-8: Specifying Agreement Contacts

Step 1. Edit the contact information accordingly.

Step 2. Click the **Save** icon to save your changes.

NOTE: Use the Administration module Maintain People screen to add your contacts to the Sunflower SA_PEOPLE table if the contacts you want to select are not available.

SPECIFY VALID AGREEMENT ASSET SOURCES

Use the **Maintain Agreements Valid Asset Sources** screen to define the sources for assets that may be applied to an Agreement. Valid sources help to restrict the valid sources of property that can be assigned to an agreement. The **Maintain Agreements Valid Asset Sources** screen enables you to specify one or more sources from which you can select assets for the agreement such as Contractor Acquired Property or Government Furnished Property.

Scenario: The following graphic illustrates how to define valid asset sources for an agreement by using the Maintain Agreements Valid Asset Sources screen. In this example, Government Furnished Property and Contractor Acquired Property are being assigned as valid asset sources for this agreement.

NAVIGATION

- Click Agree
- Click Maintain Agreements
- Click the Valid Sources button

Description	Begin Date	End Date
GOVERNMENT FURNISHED PROPERTY		
CONTRACTOR ACQUIRED PROPERTY		
...		

Figure 3-9: Specifying Valid Asset Sources for Agreements

- Step 1.** From the **Maintain Agreements** screen, click the **Valid sources** button to open the **Valid Asset Sources** screen.
- Step 2.** Select valid asset sources for the agreement you by double-clicking in the **Description** field and selecting the asset source from the **List of Values**.
- You determine the selection of the **List of Values** when you use the administration module **Maintain Agreement Asset Sources** screen to create these sources. For more information about setting up agreement asset sources, see “Create Agreement Asset Sources” on page 201.
- Step 3.** Use the **Begin Date** field to limit the valid asset source assignment to no earlier than a specific date. This field is optional and you may leave it blank.
- Step 4.** Use the **End Date** field to limit the valid asset source assignment to no later than a specific date. This field is optional and you may leave it blank.
- Step 5.** Click the **Save** icon to save your changes.

SPECIFY AGREEMENT MODIFICATIONS

Use the **Maintain Agreements Agreement Modifications** screen to specify any formal changes related to an agreement and its associated assets. The benefits of this screen is to provide a mechanism for capturing details such as contract updates, extensions, asset additions, deletions or any details that affect the parameters of the agreement. Click the **Modifications** button on the **Maintain Agreements** screen to open the screen. Use of this screen is optional.

Scenario: The following graphic illustrates how to add modifications to an agreement. In this example, the Modification Identifier is LEASE_AMEND_1A and the Modification Date is 09/12/2005.

NAVIGATION

- Click Agree
- Click Maintain Agreements
- Click the Modifications button

Modification Identifier	Modification Date
LEASE_AMEND_1A	09/12/2005

Text

Figure 3-10: Specifying Agreement Modifications

- Step 1.** From the **Maintain Agreements** screen, click the **Modifications** button to open the **Agreement Modifications** screen.
- Step 2.** The **Modifications Date** field defaults to the current date when entering a new modification. You can edit this date to reflect the actual timing of the agreement modification. Previous modifications associated with the agreement display the date entered for those modifications.
- Step 3.** You can use the **Text** button to capture comments regarding the modifications that you have made to the agreement.
- The **Text** button opens the Capture Comments, Pictures, and Attachments screen.
- Step 4.** Click the **Save** icon to save your changes.

SPECIFY AGREEMENT AUTHORIZATIONS

Use the **Authorized Assets** screen to assign various interest assets (e.g. agreements assets, inventory assets, inactive assets, excess assets, financial assets and children assets) to an agreement. You can also use the **Authorized Assets** screen to authorize assets from other Agreements for use with this agreement (shared resources). Use of this screen is optional.

Scenario: The following graphic illustrates how to authorize assets for an agreement. In this example, the existing inventory asset, XX25, is being authorized for use on the 2000-XX-01 lease.

NAVIGATION

- Click Agree
- Click Maintain Agreements
- Click the authorized button

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	INV XX25	FORD MOTOR COMPANY	TAURUS	SEDAN
	From/To 11/28/2005	User Fields*		
<input type="checkbox"/>				
	From/To	User Fields*		
<input type="checkbox"/>				
	From/To	User Fields*		
<input type="checkbox"/>				
	From/To	User Fields*		
Message				

Figure 3-11: Specifying Authorized Assets for an Agreement

- Step 1.** From the **Maintain Agreements** screen, click the **authoriZed** button to open the **Maintain Agreements Authorized Assets** screen.
- Step 2.** Select the interest asset type in the **Interest Type** field. In this case, it is an inventory asset (**INV**) that is being authorized for use on this agreement.
- Step 3.** Enter the asset identifier in the **Identifier** field. In this case, it is asset identifier **XX25**. The **Manufacturer**, **Model**, and **Official Name** fields automatically populate upon tabbing out this field.
- Step 4.** Enter the earliest from which the asset may be used on the contract in the **From Date** field.
- Step 5.** Enter the last day on which the asset may be used on the contract in the **To Date** field.
- Step 6.** If the Asset Agreement Authorization has been extended, specify additional data in the **User Fields** field. In this case, it is not extended and is left blank.
- Step 7.** Click the **Save** icon to save your changes.

STORE AGREEMENT TEXT

Click the **Text** button on the **Maintain Agreements** screen use the **Capture Comments, Pictures and Attachments** screen to capture the terms and conditions of an agreement, attach pictures, or attach documents associated with an agreement. Depending on the entry path you use to get to the **Capture Comments, Pictures and Attachments** screen, the supporting documentation, comments and pictures are associated with either the agreement, agreement assets or agreement modifications.

- If you access this screen from the **Maintain Agreements** screen, then your comments are associated with the agreement.
- If you access this screen from the **Agreement Modifications** screen, then your comments are associated with agreement modifications.
- If you access this screen from the **Maintain Agreement Assets** screen, then your comments are associated with the agreement asset.

Scenario: The following graphic illustrates how to use this screen to add text comments to an agreement.

NAVIGATION

- Click Agree
- Click Maintain Agreements
- Click the Text button

The screenshot shows a web application window titled "Capture Comments, Pictures and Attachments - saut0060". The window has a search bar at the top containing "AGREEMENT LEASE 2000-XX-01". Below the search bar are three tabs: "Comments", "Pictures", and "Attachments", with "Comments" selected. The main content area is divided into three sections: "Comment Type" with a dropdown menu set to "TEXT"; "New Comment" with a text area containing the placeholder text "Add comments about about the agreement. Add pictures and/or upload files."; and "Comment History" with an empty list area. The window has a standard Windows-style title bar and scrollbars on the right side.

Figure 3-12: Capturing Comments for an Agreement

ADD PICTURES

Use the **Pictures** tab to add pictures related to a specified agreement with the **Add Picture** button. If there is more than one picture attached to an agreement, use the **Picture List** button to view the list of pictures associated to the agreement. Use the **View Picture** button to view a picture in a separate web browser from which you can download or save the picture to a local directory.

Scenario: The following graphic illustrates how to use this screen to attach a picture to an agreement.

NAVIGATION

- Click Agree
- Click Maintain Agreements
- Click the Text button
- Click the Pictures tab

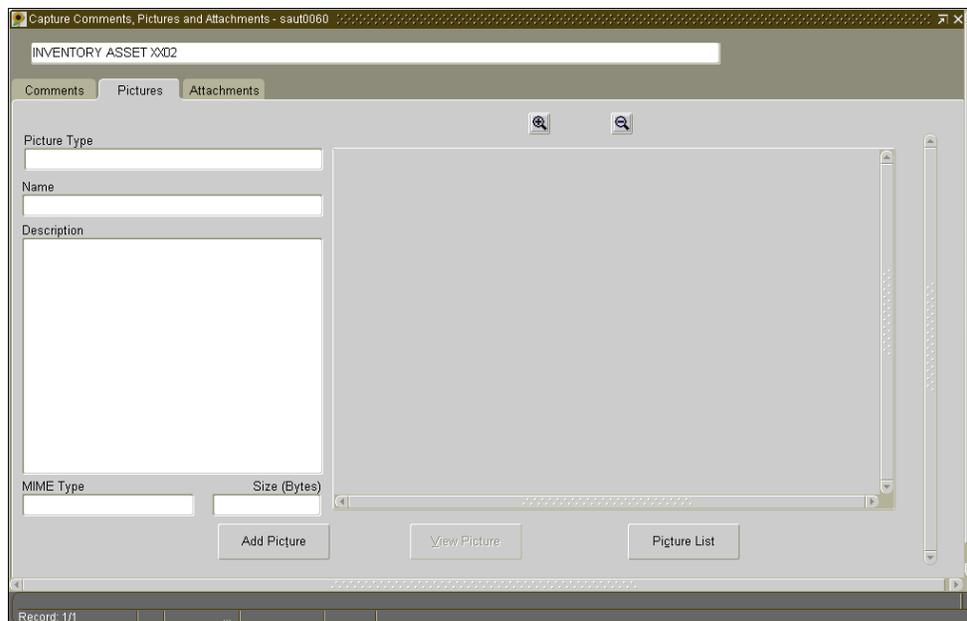


Figure 3-13: Capturing Pictures for an Agreement

- Step 1.** Navigate to the **Maintain Agreements** screen.
- Step 2.** Click the **Text** button
- Step 3.** Click the **Pictures** tab.
- Step 4.** Click the **Add Picture** button to open the **Picture Upload** screen.

Step 5. Navigate to the related asset picture file and choose the appropriate picture.

NAVIGATION

- Click **Pictures** tab
- Click **Add Picture**



Picture Upload

File
C:\Documents and Settings\esorial\My Documents\My Pictures\Sample.jpg

Picture Type
OTHER

Description
Provide a description about the attached picture and its relation to the agreement and agreement assets.

Figure 3-14: Uploading Picture Files

- Step 6.** Click the **Browse** button to select a picture from a directory path where the picture resides.
- Step 7.** Select the type of picture that you want to upload in the **Picture Type** field.
- Step 8.** Use the **Description** field to provide descriptive text about the picture and how it relates to the asset.
- Step 9.** Click the **Upload** button. If successful, a web page pops up indicating that the file uploaded successfully.
- Step 10.** Close the web page to return to Sunflower.

Step 11. Click the **OK** button to display the picture.

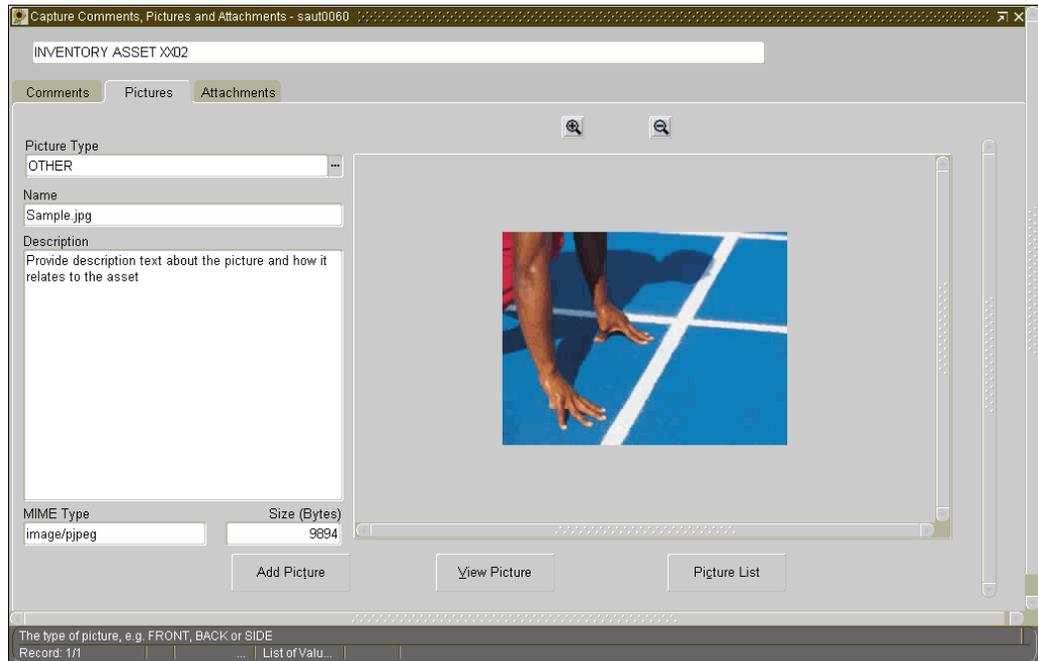


Figure 3-15: Adding Pictures to an Agreement

Step 12 Click the **Save** icon to save your changes.

ADD ATTACHMENTS

Use the **Attachment** tab to add documents related to the specified agreement with the **Add Attachment** button. If there is more than one attachment for an agreement, use the **Attachment List** button to view the list of attachments associated to the agreement. The **View Attachment** button displays a given attachment in a separate web browser from that can be downloaded or saved to a local directory.

Scenario: The following graphic illustrates how to upload an attachment to an agreement.

NAVIGATION

- Click Agree
- Click Maintain Agreements
- Click the Text button
- Click the Attachments key
- Click Add Attachment
- Specify details
- Click Upload

The screenshot shows a web application window titled "Capture Comments, Pictures and Attachments - sau0060". The window has a search bar at the top containing "INVENTORY ASSET 002". Below the search bar are three tabs: "Comments", "Pictures", and "Attachments", with "Attachments" being the active tab. The main area contains a form with the following fields: "Attachment Type" (dropdown menu showing "OTHER"), "Name" (text input field containing "Training Sample Word Doc.doc"), "MIME Type" (text input field containing "application/msword"), and "Size (Bytes)" (text input field containing "24064"). Below these fields is a "Description" label and a large text area containing "Sample Attachment file.". At the bottom of the form area are three buttons: "Add Attachment", "View Attachment", and "Attachment List". The status bar at the very bottom of the window displays "Record: 1/1" and "List of Valu...".

Figure 3-16: Adding Attachments to an Agreement

- Step 1.** From the **Maintain Agreements** screen, click the **Text** button.
- Step 2.** Click the **Attachments** tab to open the **Attachment Upload** dialog box.
- Step 3.** Click the **Browse** button to select an attachment from its location on a local or shared directory.
- Step 4.** Use the **Attachment Type** field to select the type of attachment that is being uploaded.
- Step 5.** Use the **Description** field to provide descriptive text about the attachment and how it relates to the asset.
- Step 6.** Click the **Upload** button. If successful, a web page pops up indicating that the file uploaded successfully.
- Step 7.** Close the web page to return to Sunflower.
- Step 8.** Click the **OK** button to display the attachment.
- Step 9.** Click the **Save** icon to save your changes.

CREATE AGREEMENT ASSETS

Use the **Maintain Agreement Assets** screen to create agreement assets from existing interest assets or to create agreement assets from scratch (without an existing interest assets).

There are two methods for adding assets to an agreement:

- Use the **aSsets** button on the **Maintain Agreements** screen or
- Create agreement assets from the **Maintain Agreement Assets** screen

The first method requires that you create an agreement asset from an existing interest asset such as an inventory asset. The second method enables you to create agreement assets from scratch. The following section illustrates how to create agreement assets using both methods.

USE THE MAINTAIN AGREEMENTS SCREEN TO CREATE AGREEMENT ASSETS

Use the **aSsets** tab on the **Maintain Agreements** screen to add assets to an agreement.

Scenario: The following graphic illustrates how to add assets to an agreement. In this example, the existing inventory asset, XX60, is being added to the 2000-XX-01 lease as Government Furnished Property.

NAVIGATION

- Click Agree
- Click Maintain Agreements
- Click the aSsets tab

Existing Asset	Manufacturer	Model	Official Name
<input type="checkbox"/> AGR XX60	APPLE	M5555	COMPUTER PORTABLE
Identifier	Source	GOVERNMENT FURNISHED PROPERTY	
<input type="checkbox"/>			
Identifier	Source		
<input type="checkbox"/>			
Identifier	Source		
<input type="checkbox"/>			
Identifier	Source		

Message

Figure 3-17: Adding Assets to an Agreement

- Step 1.** From the **Maintain Agreements** screen, click the **aSsets** tab to open the **Agreement Assets** block of the **Maintain Agreements** screen. Add new agreement assets or edit existing agreement assets.
- Step 2.** Select the interest asset type in the **Interest Type** field.
- Step 3.** Enter the asset identifier in the **Identifier** field. The **Manufacturer**, **Model**, and **Official Name** fields automatically populate upon tabbing out this field.
- Step 4.** Enter the Agreement Interest Type asset identifier in the **Identifier** field. You can an existing interest asset identifier or create a new agreement asset identifier to suit your business practices.
- Step 5.** Specify a valid agreement asset source, if applicable, for the asset. (e.g. *Government Furnished Property* or *Contractor Acquired Property*). Use the Administration module **Maintain Agreement Asset Classifications** screen to add valid agreement asset sources with the
- Step 6.** Specify a valid agreement asset classification, if applicable, for the asset. (e.g. *Agency Peculiar Property* or *Material*) Use the Administration module **Maintain Agreement Asset Classifications** screen to add agreement asset classification. Add as many assets as you need by inserting rows to the **Agreement Assets** block.

NOTE: You only specify agreement asset sources and agreement asset classifications for government reporting based agreement types.

- Step 7.** Click the **Save** icon to add the asset to the agreement.

Tips: There is a trick to creating agreement assets from scratch using the **Maintain Agreements** screen. You can access the **Maintain Agreement Assets** screen by clicking the **aSsets** button and create agreement assets from scratch or from existing assets as needed. Place your cursor in a blank row, click the **aSsets** button to open a blank **Maintain Agreement Assets** screen and enter the new agreement asset information. Save your entry and the system will return you to the **Agreement Assets** block of the **Maintain Agreements** screen with the new agreement asset in the previously blank row. Your ability to create and edit agreement assets will vary depending on your the roles assigned to your user ID.

USE THE MAINTAIN AGREEMENT ASSETS SCREEN TO CREATE AGREEMENT ASSETS

Use the **Maintain Agreement Assets** screen to create agreement assets and associate those assets to an agreement. The Maintain Agreement Assets screen requires a two-step process where, first, you identify the agreement to which you add assets to, and then create the agreement assets. Assets can be created either from scratch or from other interest assets.

Scenario: The following graphic illustrates how to create an agreement asset by defining required and optional fields such as the asset identifier, catalog identifier, initial event, asset value, asset source, classification, location etc. Once the asset record is saved the asset is tied to agreement 2000-XX-01. In this example, the inventory asset, XX62, is tied to the 2000-XX-01 lease agreement.

NAVIGATION

- Click Agree
- Click Maintain Agreement Assets
- Select the Agreement
- Click the Tab key

Maintain Agreement Assets - asag2010

Agreement Selection

Identifier: 2000-XX-01 Type: LEASE

Choose an Agreement and Press [Next Field]

Maintain Agreement Assets - asag2010 (Page 1 of 3)

Agreement Assets for LEASE 2000-XX-01

Identifier	Type	Type	Identifier
XX62	Existing Interest asset	INV	XX62

Unique Identifier

Catalog Identifier* 1 Commodity Asset Parents 0 Children 0 C/A/P

Manufacturer APPLE Model M5555

Official Name COMPUTER PORTABLE Model Name DUO DOCK

Serial Number XX62 Drawing No

Initial Event SUBJECT TO AGREEMENT User Fields*

Asset Value * \$6,500.00 Acquisition Date 12/09/2000 Responsibility Date 12/09/2000

Asset Condition 4 USED - GOOD Effective Date 07/07/2005 Expected Return Date

Alternate Id 1 Alternate Id 2 Alternate Id 3

Asset Source Agr Classification

Activity Status IN SERVICE Flags* Activity Type

Manager SUNFLOWER SYSTEMS Owner SUNFLOWER SYSTEMS

Steward SUNFLOWER SYSTEMS Rep

Custodian 020866 Last Name* FRAZIER First KRISTEN Mid SPA

User Last Name* MILLER First CARL Mid

Location GENERAL OFF SITE _2600 BOLLINGER CANYON _SAN RAMON _CA _USA_ 94583

Document*

User Fields*

Global User Fields*

Page 2 Commodity Comment

Figure 3-18: Creating Agreement Assets with the Maintain Agreement Assets Screen

Step 1. Navigate to the **Maintain Agreements Assets** screen.

Step 2. Select the appropriate agreement. Enter the agreement identifier in the **Identifier** field for the new agreement.

In this case, the agreement identifier is *2000-XX-01*. The **Agreement Selection** window closes and the **Maintain Agreements Assets** screen appears.

Step 3. Enter an agreement interest asset identifier in the **Identifier** field. In this case, *XX62*.

Step 4. The agreement asset identifier can be the same as the existing interest asset or you can create another tracking number for your agreement asset according to your business practices.

Step 5. Enter the existing asset interest type (e.g. *INV* for Inventory Management).

NOTE: If you want to create an agreement asset from scratch (without an existing interest asset) you can leave this and the related existing asset **Identifier** field blank. Enter the remaining asset information for the new agreement asset.

Step 6. Enter the existing asset **Identifier**, (*XX62*), of the asset that you want to add to the agreement and tab out of the field to display the asset's information.

NOTE: If you want to create an agreement asset from scratch (without an existing interest asset) you can leave this field blank and fill out the asset information for the new agreement asset directly.

Step 7. Enter or change the new agreement asset's specific information in the appropriate fields.

For example, the **Maintain Agreements Assets** screen has unique fields to capture agreement asset specific information (e.g. Agreement Source, Agreement Classification, Alternate Ids etc.) If you do not enter a value in a required field, Sunflower prompts you to do so.

NOTE: If you look at the **Agreement Asset Summary and History** screen and click the **Interest Details** button, the pop up window reveals the agreement asset interest fields.

Step 8. Specify any alternate IDs for the agreement assets in the Alternate Id 1, 2, and 3 fields.

Used if the asset has one or more alternate tracking identifiers. Alternate Ids 1-3 - are additional tag numbers that can be associated with an agreement asset by using an alternative Id (e.g. vendor's tag number or an organization's project affiliated Id, etc.)

Step 9. Specify the asset source (e.g. *Contractor Acquired Property* or *Government Furnished Property*) in the **Asset Source** field.

Step 10. Specify the agreement asset's classification (e.g. *Special Test Equipment*) in the **Agr Classification**.

- Step 11.** Update the contact information (e.g. **Manager, Custodian, Steward, User**) for the agreement asset.
- Step 12.** Update the location information by double-clicking in the **Location** complex field and editing the information accordingly.
- Step 13.** The **Page 2** button opens the **Catalog Information** screen where you may review catalog entry information and enter override data for properties such as **Service Life** and **Salvage Value**.
- Step 14.** The **Commodity** button opens the **Commodity** screen to enter information about commodity assets, (e.g. screws, pencils, etc.).

This button is only active when an asset has been designated as a commodity. If the agreement asset is created from an existing asset, the existing asset must be specified as a commodity for this button to be active on this screen.

- Step 15.** Click the **Save** icon to create the new agreement asset.

NOTE: These changes are also reflected in the Inventory Management module since you added an existing agreement asset to an agreement.

DEFINE ALTERNATE AGREEMENT ASSET IDENTIFIERS

When creating agreement assets from an existing interest asset, you can reuse the existing interest asset IDs or you can modify the new agreement asset with a new identifier. Modifying the identifier for your agreement asset does not create a new asset but applies a logical tag to your existing asset that you are associating with an agreement. The asset retains the history of the existing interest asset information in the Sunflower database but the new agreement identifier tag can make it easier to distinguish the change in status for the asset. Look at the changes in the following example and compare the information the **Agreement Summary and Asset History** screen displays to verify that the historical information is retained from the existing interest asset information.

Scenario: The following graphic illustrates how to define an alternate agreement asset identifier. In this example, the inventory asset, 0961, is being added to the 2000-01-01 defense agreement and an alternate agreement asset ID, AGR0961, is being created for tracking to the agreement. The inventory asset information is captured by the original (existing) interest asset, inventory asset 0961. The following graphics compare the data captured by the Maintain Agreement Assets screen after adding the existing asset to an agreement with the new alternate agreement ID. The **Agreement Asset Summary and History** screen displays the current and historical information to verify that the existing interest asset information is retained.

NAVIGATION

- Click Agree
- Click Maintain Agreement Assets
- Select the Agreement
- Click the Tab key

Figure 3-19: Creating Alternate Agreement Asset Identifiers

Step 1. Navigate to the **Maintain Agreements Assets** screen.

Select the appropriate agreement. Enter the agreement identifier in the **Identifier** field for the new agreement. In this case, the agreement identifier is *2000-XX-01*. The **Agreement Selection** window closes and the **Maintain Agreements Assets** screen appears.

Step 2. Enter an agreement interest asset identifier in the **Identifier** field. In this case, *AGR0961*.

Step 3. Enter the existing asset interest type (e.g. *INV* for Inventory Management)

Step 4. Enter the existing asset **Identifier**, *0961*, of the asset that you want to add to the agreement and tab out of the field to display the asset's information.

Step 5. Enter or change the new agreement asset's specific information in the appropriate fields.

For example, the **Maintain Agreements Assets** screen has unique fields to capture agreement asset specific information (e.g. Agreement Source, Agreement Classification, Alternate Ids etc.) If you do not enter a value in a required field, Sunflower prompts you to do so.

NOTE: If you look at the **Agreement Asset Summary and History** screen and click the **Interest Details** button, the pop up window reveals the agreement asset interest fields.

Step 6. Specify any alternate IDs for the agreement assets in the Alternate Id 1, 2, and 3 fields.

Used if the asset has one or more alternate tracking identifiers. Alternate Ids 1-3 - are additional tag numbers that can be associated with an agreement asset by using an alternative Id (e.g. vendor's tag number or an organization's project affiliated Id, etc.)

Step 7. Specify the asset source (e.g. Contractor Acquired Property or Government Furnished Property) in the **Asset Source** field.

Step 8. Specify the agreement asset's classification in the **Agr Classification**.

Step 9. Update the contact information (e.g. **Manager, Custodian, Steward, User**) for the agreement asset.

Step 10. Update the location information by double-clicking in the **Location** complex field and editing the information accordingly.

Step 11. The **Page 2** button opens the **Catalog Information** screen where you may review catalog entry information and enter override data for properties such as **Service Life** and **Salvage Value**.

Step 12. The **Commodity** button opens the **Commodity** screen to enter information about commodity assets, (e.g. screws, pencils, etc.).

This button is only active when an asset has been designated as a commodity. If the agreement asset is created from an existing asset, the existing asset must be specified as a commodity for this button to be active on this screen.

Step 13. Click the **Save** icon to create the new agreement asset.

NOTE: These changes also are reflected in the Inventory Management module when using the existing interest asset identifier.

REVIEW THE AGREEMENT ASSET

Use the **Agreement Asset Summary and History** screen to review the history of the **XX60** agreement asset. The screen displays the current record reflecting the changes made in the previous example (e.g. new user, location etc.) and the previous record is consistent with the original inventory asset, XX60, information.

Scenario: The following graphic illustrates how to review the current record of the XX60 agreement asset.

NAVIGATION

- Click Agree
- Click Agreement Asset Summary and History
- Select the Include History checkbox

The screenshot shows the 'Agreement Asset Summary and History' window for asset 'asmn2055 (Page 1 of 3)'. The 'Assets' section has the 'Include history' checkbox checked. The 'Identifier' field contains 'XX60', and the 'Current Identifier' is also 'XX60'. The 'Manufacturer' is 'APPLE', 'Official Name' is 'COMPUTER PORTABLE', and 'Model' is 'M5555'. The 'Asset Value*' is '\$6,500.00 NOT CAPITALIZED' and 'Asset Condition' is '4 USED - GOOD'. The 'Acquisition Date' is '12/09/2000' and 'Effective Date' is '07/07/2005'. The 'Act Status/Type' is 'IN SERVICE'. The 'Manager' and 'Steward' are both 'SUNFLOWER SYSTEMS'. The 'Custodian' is 'FRAZIER KRISTEN S 020866' and the 'User' is 'MILLER CARL'. The 'Location*' is 'GENERAL OFF SITE__2600 BOLLINGER CANYON__SAN RAMON__CA__USA__94583'. There are also fields for 'Initial Event' (SUBJECT TO AGREEMENT), 'Final Event', 'User Fields*', and 'Global User Fields*'. At the bottom, there are buttons for 'Create Information' and 'Interest Details'.

Figure 3-20: Asset Summary and History Screen Captures Current Information

Scenario: The following graphic illustrates how to review the previous record of the XX60 agreement asset.

NAVIGATION

Scroll down to the previous record.

The screenshot shows the 'Agreement Asset Summary and History' window for asset 'asmn2055'. The 'Include history' checkbox is checked. The 'Identifier' field contains 'XX60'. The 'Current Identifier' field also contains 'XX60'. The asset details include:

Manufacturer	APPLE	Model	MS555
Official Name	COMPUTER PORTABLE	Model Name	DUO DOCK
Serial Number	XX60	Drawing No	
Initial Event	SUBJECT TO AGREEMENT	User Fields*	
Final Event		User Fields*	
Asset Value*	\$6,500.00 NOT CAPITALIZED	Acquisition Date	12/09/2000
Asset Condition		Effective Date	12/09/2000
		Responsibility Date	12/09/2000
		Expected Return Date	
Act Status/Type	IN SERVICE	Flags	
Manager	SUNFLOWER SYSTEMS	Activity Type	
Steward	SUNFLOWER SYSTEMS	Owner	SUNFLOWER SYSTEMS
		Rep	
Custodian	FRAZIER KRISTEN S 020866		
User			
Location*	LIVERMORE_BUILDING_121_ROOM_101		
Document*			
User Fields*			
Global User Fields*			

Buttons at the bottom: Creator Information, Interest Details

Figure 3-21: Asset Summary and History Screen Captures Old Information

Step 1. Navigate to the **Agreement Asset Summary and History** screen.

Step 2. Select the **Include History** checkbox and enter the new agreement asset identifier, **XX60**, in the **Identifier** field.

The previous and the current records for the **XX60** agreement asset are reflected in the **Agreement Asset Summary and History** screen.

AGREEMENT ASSET SUMMARY AND HISTORY FIELD TERMS

The following table defines the purpose of each field on the **Agreement Asset Summary and History** screen.

Agreement Asset Summary and History Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
Include History	When you select the Include History checkbox, the screen returns current and historical records for the selected agreement asset. To view the other records, click the Previous Record and Next Record icons on the Tool Bar. If you do not select Include History , the screen returns only the current record for the agreement asset.
Next/Previous Record Indicator	The field adjacent to the Include History checkbox indicates if there are multiple records for the selected agreement asset. A v indicates that you are viewing the most current record for the asset. You can scroll through the earlier records of an asset by selecting the Next Record icon to view the history of that agreement asset. A ^ v indicates that you can select either the Previous Record icon or Next Record icon to view the other records for the selected agreement asset. A ^ indicates that you are viewing the earliest record entry for the agreement asset and you can only scroll back through the agreement asset records using the Previous Record icon.
Parents	The Parents field displays the number of parent records for the current asset record that you are viewing. If an asset has a parent asset association, the number of associations displays in the Parents field. An asset can have multiple parents. Double click in the Parents field to view the parent record information on the Maintain Asset Structures screen.
Children	The Children field displays the number of child records for the current asset record that you are viewing. An asset can have multiple children. Double click in the Children field to view the child record information on the Maintain Asset Structures screen.
C/A/P	The C/A/P field indicates if there is a comment C , attachment A or picture P attached to the selected agreement asset record.
Identifier	The asset identifier is a unique tracking number for the assigned agreement asset. For example, a barcode, tag number or property identification number.
Identifier Type	Displays the identifier type, (e.g. barcode, RFID, or PIN).
Current Identifier	Displays the tracking identifier assigned to the agreement asset when the historical record was current.
Unique Identifier (UID)	Displays the unique identifier assigned to the agreement asset. The Unique Identifier is a data set on items that is globally unique, unambiguous and robust enough to ensure that information is consistent through the life cycle of the asset and supports the multifaceted business applications and users.
Manufacturer	Displays the name of the manufacturer of the asset.
Model Number	Displays the model number assigned to the asset by the manufacturer.
Official Name	Displays your organization's official description for the asset by a particular manufacturer and model combination.
Model Name	Displays the model name assigned to the asset by the manufacturer.

Agreement Asset Summary and History Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
Serial Number	Displays the serial number assigned to the asset by the manufacturer.
Drawing No	Displays the drawing number used to design and construct the asset. Generally used for architectural and construction project use.
Initial Event	Displays the asset initial event type. For example, <i>Purchase</i> , <i>Fabrication</i> or <i>Transfer</i> . An initial event is the asset's method of acquisition. Sunflower enables you to establish the initial event types that best suit your organization. You can use the Administration module to define other Asset Initial Event Types for your organization by using the Maintain Asset Event Types screen, select the <i>Asset Initial Event Type</i> category, and then add the Asset Event Type .
User Fields	Displays user field information associated with the initial event.
Final Event	Displays the asset final event type. For example, <i>Excess Sale</i> or <i>Transfer</i> . A final event is the method for recording the retirement of an asset. Sunflower enables you to capture each interest asset's final event. You can use the Management module to further define asset final events for your organization by using the Create Inventory Asset Final Events screen.
User Fields	Displays user field information associated with the final event.
Asset Value	Displays the value entered for the asset. Press the Edit icon to display the asset value component and summary detail. The field adjacent to Asset Value specifies if the asset is capitalized or not capitalized. You can capitalize an asset with the Finance module using the Capitalize Financial Assets screen.
Acquisition Date	Displays the date the asset was acquired.
Responsibility Date	Displays the date the organization became responsible for the asset.
Asset Condition	Displays the current condition of the asset.
Effective Date	Displays the date of the last asset transaction. (event)
Expected Return Date	Displays the expected return date of an asset that has been loaned, stored, or sent out for repair.
Act Status/Type	Displays the current active status of an asset such as <i>In Service</i> or <i>Storage</i> .
Flags	Displays the flags assigned to an asset.
Activity Type	Displays the asset's activity type. You can create activity types with the Administration module by using the Maintain Domains screen, select the <i>Activity Type</i> domain and modify or add a new activity type.
Manager	Displays the organization that manages the asset. A Manager may be the child organization of an Owner in a parent-child hierarchical structure.
Owner	Displays the organization that owns the asset. An Owner is the highest level of authority in a parent-child hierarchical structure. It can be the parent of a Manager .
Steward	Displays the organization that is the steward of an asset. A Steward may be the child organization of a Manager in a parent-child hierarchical structure.
Rep	Displays the name of the steward's primary asset center representative.
Custodian	Displays the asset's custodian. A custodian is the person in possession of and responsible for the control and care of an asset.

Agreement Asset Summary and History Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
User	Displays the user of an asset. The person that is authorized to use an asset.
Location	Displays the asset's location.
Document	Displays the type of supporting documentation, documentation identifier, storage type and organization for an asset.
User Fields	Displays user field information associated with the Inventory Asset.
Global User Fields	Displays global user field information applicable to the Core Asset record.
Creator Information	Click to open the Creator Information display box to view the Transaction Creator Information . You can click the Next Record and Previous Record icons to view the different asset state transactions for an asset. The Transaction Creator Information captures the date and time, and the creator of each transaction.
Interest Details	Click the Interest Details button to open the interest asset details screen. The Agreement Asset Details screen can be opened and available for editing.

MAINTAIN AGREEMENTS

The management of agreements and their assets consists of numerous tasks that a contracts manager faces on a daily basis such as the update, transfer, and removal of assets. The following section illustrates several common management tasks that you can perform in the Agreements module to manage and track your agreement.

- “Edit Agreements”
- “Track Modifications”
- “Close Agreements”

EDIT AGREEMENTS

When the parameters of a contract change, the contract should reflect those changes. For example, if assets on a contract are to be extended for use beyond the original scheduled end date, apply the change to the agreement accordingly. Use the **Maintain Agreements** screen to update the scheduled end date on the contract to reflect this extension or any other parameters (e.g. authorizations, modifications, assets, contacts etc.) for the agreement.

Scenario: The following graphic illustrates how to update an agreement. In this example, the scheduled end date of the 2000-XX-01 agreement is being moved out a year from 07/01/2006 to 07/01/2007.

- NAVIGATION
- Click Agree
 - Click Maintain Agreements

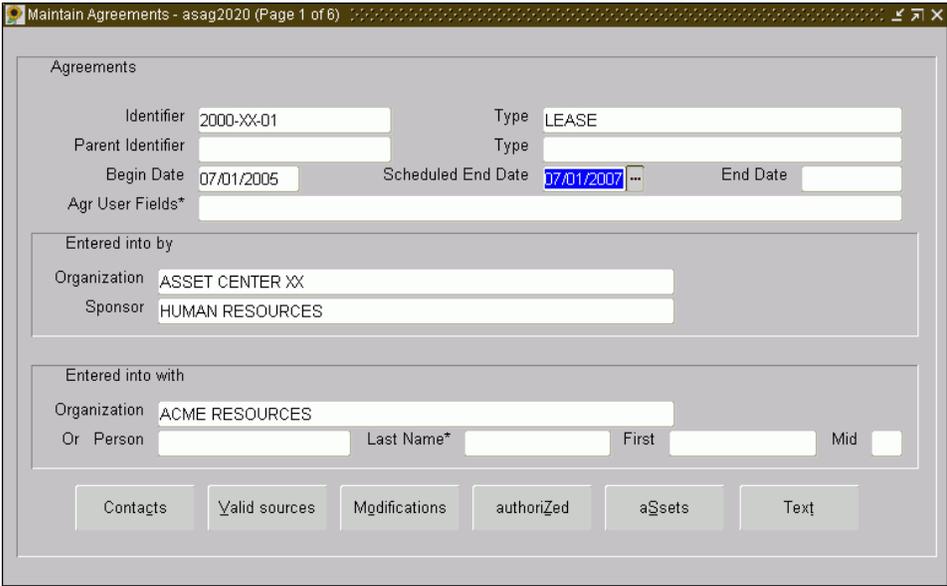


Figure 3-22: Editing a Scheduled End Date

- Step 1.** Navigate to the **Maintain Agreements** screen.
- Step 2.** Click the **Find** button to enter query mode.
- Step 3.** Enter the criteria that match the agreement you want to update. (*2000-01-01*)
- Step 4.** Click the **Find** button again to execute the query.
- Step 5.** Using the **Scheduled End Date** field, extend the expected end date of the lease one year. (*07/01/2007*)
- Step 6.** Click the **Save** icon to update the agreement.

TRACK MODIFICATIONS

You can create audit logs that track changes that occur when a user edits an agreement. This can be valuable for supporting audits of contracts. Use the Administration module **Object Audit Status** screen to select the objects (tables) that you want to audit. Since agreement modifications will occur infrequently, you may only want to turn on object audit status for the Agreement Modification table (AS_AGREEMENT_MODIFICATIONS) to track agreement modifications.

MAINTAIN OBJECT AUDIT STATUS

Each time the **Agreement Modifications** screen is accessed and an update is made to this screen, the AS_AGREEMENTS_MODIFICATIONS table will capture this activity and the enabled audit for this object will provide a summary of the activity that occurred providing information such as the user, datetime and changes to records (insert, update, deletion). Exercise caution when auditing objects as some tables will be accessed and updated with greater frequency than others. If too many objects have the object audit process turned on, the system's performance will degrade.

Scenario: The following graphic illustrates how to set up auditing for the Agreement Modifications screen. The object name (table) for this audit is AS_AGREEMENT_MODIFICATIONS.

NAVIGATION

- Click Admin
- Click User Extensibility
- Click Maintain Object Audit Status

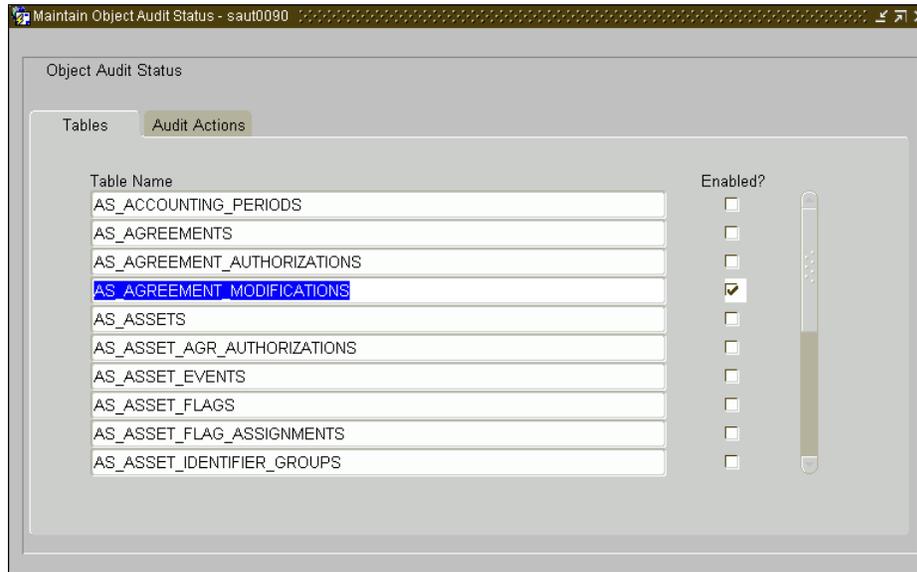


Figure 3-23: Tracking Agreement Modifications

- Step 1.** Navigate to the **Maintain Object Audit Status** screen.
- Step 2.** Click the **Find** button to enter query mode.
- Step 3.** Enter the criteria that matches the agreement that you want to update.
- Step 4.** Click the **Find** button again to execute the query.
- Step 5.** Check the **Enabled?** checkbox to turn on the audit feature next to object that you want to audit.
Uncheck to disable the audit feature for a specified object.
- Step 6.** Click the **Save** icon to turn on the audit.

OBJECT AUDIT LOG

After turning on the **Object Audit Status** feature, view the activity captured by the object log by navigating to the administration module **Object Audit Log** screen as shown below. This is a display only screen.

NAVIGATION

- Click Admin
- Click User Extensibility
- Click Object Audit Log

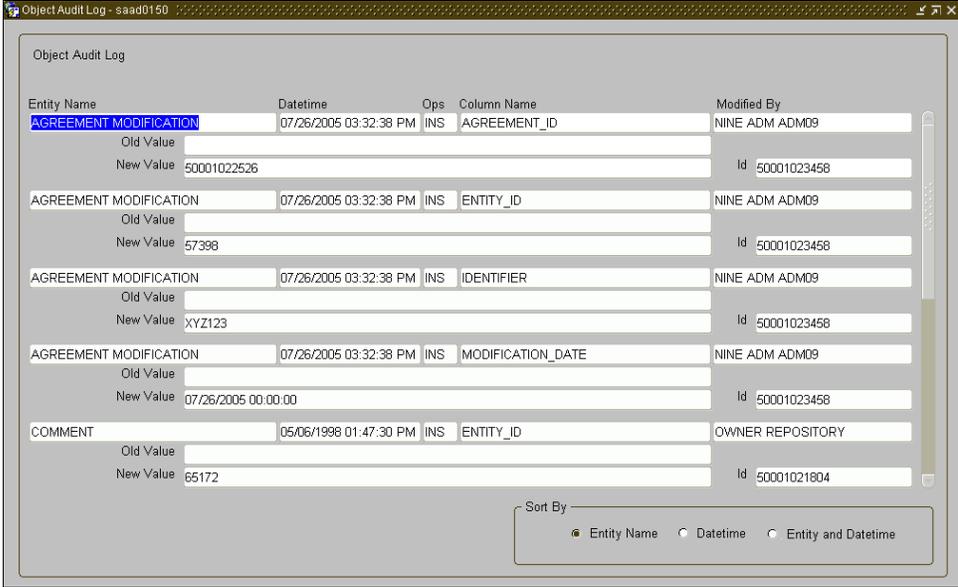


Figure 3-24: Viewing the Object Audit Log for Agreement Modifications

After turning on the **Object Audit Status** feature for the **AS_AGREEMENT_MODIFICATION** table, any changes that occur while modifying agreements will track on the **Object Audit Log** for changes to items such as the **Entity** (Agreement Modification or AS_AGREEMENT_MODIFICATIONS table), **Column Name**, the **Ops** (operations such as insertion, deletion, edit) **Modified By** etc. until you turn the audit for this object off.

CLOSE AGREEMENTS

When a contract expires and all agreement assets are removed from the agreement, close (retire) the agreement. To close an agreement use the **Maintain Agreements** screen by specifying a date in the **End Date** field. Assets cannot be added to a closed agreement. It is a good practice to remove all assets from an agreement before retiring the agreement.

Scenario: The following graphic illustrates how to close agreement 1999-01-01 by specifying the last active date as *10/28/2005* for the agreement.

NAVIGATION

- Click Agree
- Click Maintain Agreements

The screenshot shows the 'Maintain Agreements' screen with the following fields and values:

Agreements	
Identifier	2000-XX-01
Type	DEFENSE
Parent Identifier	
Type	
Begin Date	06/01/2005
Scheduled End Date	06/01/2006
Agr User Fields*	

Buttons: Text, Parties, Contacts, Valid Sources, Assets, Modifications, Authorized

Entered into by:

Organization	ASSET CENTER XX
Sponsor	HUMAN RESOURCES

Entered into with:

Organization	ACME RESOURCES
Or Person	
Last Name*	
First	

Figure 3-25: Closing an Agreement with the Maintain Agreements Screen

- Step 1.** Navigate to the **Maintain Agreements** screen.
- Step 2.** Click the **Find** button to enter query mode.
- Step 3.** Enter the criteria that match the agreement you want to update.
- Step 4.** Click the **Find** button again to execute the query.
- Step 5.** Sunflower returns all agreements that match the criteria you specified. Use the **Previous Record** and **Next Record** icons to navigate to the agreement you want to update.
- Step 6.** In the **Agreements** block, in the **End Date** field, enter the date (*10/28/2005*) the agreement closes.
- Step 7.** Click the **Save** icon to close the agreement.

NOTE: A closed agreement cannot have additional assets associated with it. Assets associated with the agreement at the time of closing are not affected.

MAINTAIN AGREEMENT ASSETS

The Agreement module facilitates the detailed tracking of the relationships between assets, organizations and people as they change over time. After you acquire your assets, you will need to assign a location, a responsible party and organization for each asset.

Sunflower enables you to maintain your agreement assets by using several Agreement module screens to update several of the attributes of your agreement assets. Complimenting the **Maintain Agreement Assets** screen are the supporting Agreement module screens that can assist you in the day-to-day management of your agreement assets. The **Capture Comments Picture, and Attachments** screen enables you to attach supporting documentation, comments and pictures for your agreement assets.

The **Transfer Agreements** screen enables you to create and accept asset transfer requests to other steward organizations. To provide for individual and organization transfers, Sunflower uses a request/accept/deny model to ensure that accountability is not transferred without consent of both parties. This permits an organization or individuals to request that another organization or individual become accountable for an asset.

The **Change Agreement Asset Information** screen enables you make simultaneous mass updates to multiple assets within your organization. Another useful Agreement module feature is the **Maintain Asset Structure** screen that enables you to manage your diverse set of Parent/Child asset structures. Finally, the Agreement module reports enable you to view the details and history of your agreement assets.

The following section illustrates several common management tasks that you can perform in the Agreements module to manage and track your agreement assets.

- “Edit Agreement Assets”
- “Transfer Agreement Assets”
- “Withdraw Inactive Receival Request”

EDIT AGREEMENT ASSETS

Common properties such as Activity Status, Location, and User will change throughout an asset's lifecycle and Sunflower enables you to capture these changes to reflect the most current information for your agreement assets. Use the **Maintain Agreement Assets** screen to edit an agreement asset.

Scenario: The following graphic illustrates how to edit the agreement asset, XX1234.

- NAVIGATION**
- Click Agree
 - Click Maintain Agreement Assets

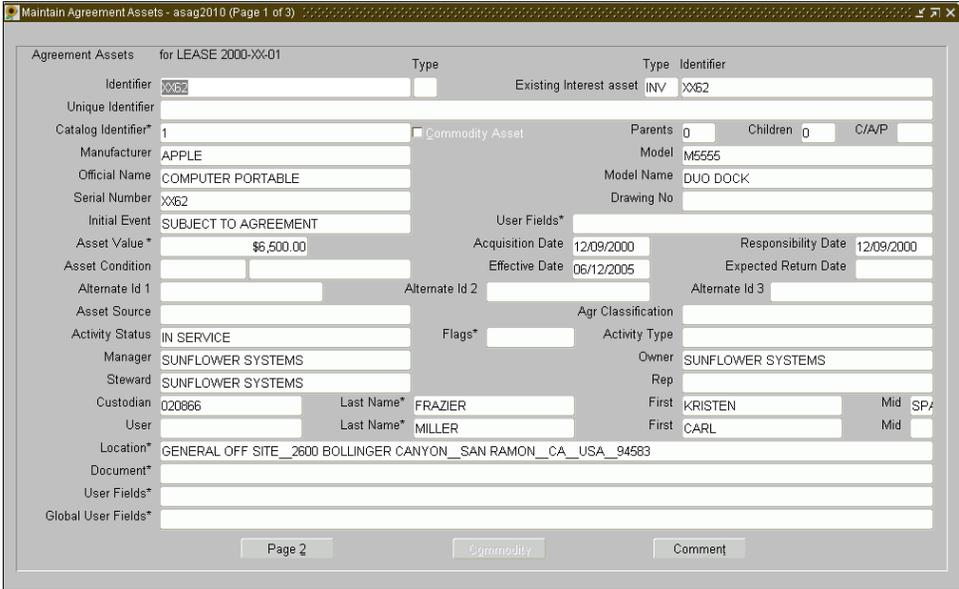


Figure 3-26: Editing Assets with the Maintain Agreement Assets Screen

- Step 1.** Navigate to the **Maintain Agreements Assets** screen.
- Step 2.** Select the appropriate agreement.
- Step 3.** Enter the agreement identifier in the **Identifier** field for the new agreement. In this example, the agreement identifier is *2000-XX-01*.

The **Agreement Selection** window closes and the **Maintain Agreements Assets** screen appears.

- Step 4.** Enter an agreement interest asset identifier in the **Identifier** field. In this example, *XX62*.
- Step 5.** Press the Tab button to display the asset's information.
- Step 6.** Enter new or update current information in the appropriate fields. For example, edit the following field,

Specify the agreement asset's classification (e.g. Special Test Equipment) in the **Agr Classification**.

Update the contact information (e.g. **Manager, Custodian, Steward, User**) for the agreement asset. The new contact is *Carl Miller*.

Update the location information by double-clicking in the **Location** complex field. The following location properties are now updated to *GENERAL OFF SITE_2600 BOLLINGER CANYON_SAN RAMON_CALIFORNIA_USA_94583*.

- Step 7.** The **Page 2** button opens the **Catalog Information** screen where you may review catalog entry information or override data for properties such as **Service Life** and **Salvage Value**.
- Step 8.** Click the **Save** icon to create the new agreement asset.

CHANGE AGREEMENT ASSET INFORMATION

Many changes can occur over the course of an asset’s lifecycle. The most common changes are those that affect the location, custodian and user asset. There are several ways to manage property records based on the type of changes required. While it is possible to change the location of a single record using the **Maintain Agreement Assets** screen, the **Change Agreement Asset Information** screen provides the ability to make updates to multiple assets at the same time.

Scenario: The following graphic illustrates how to use the Change Agreement Asset Information screen to update the location of multiple assets at once. In this example, The assets assigned to the NASA-456 contract have been moved to a new location, Room 123 in Building 100 at the Livermore site.

- NAVIGATION**
- Click Agree
 - Click Change Agreement Asset Information

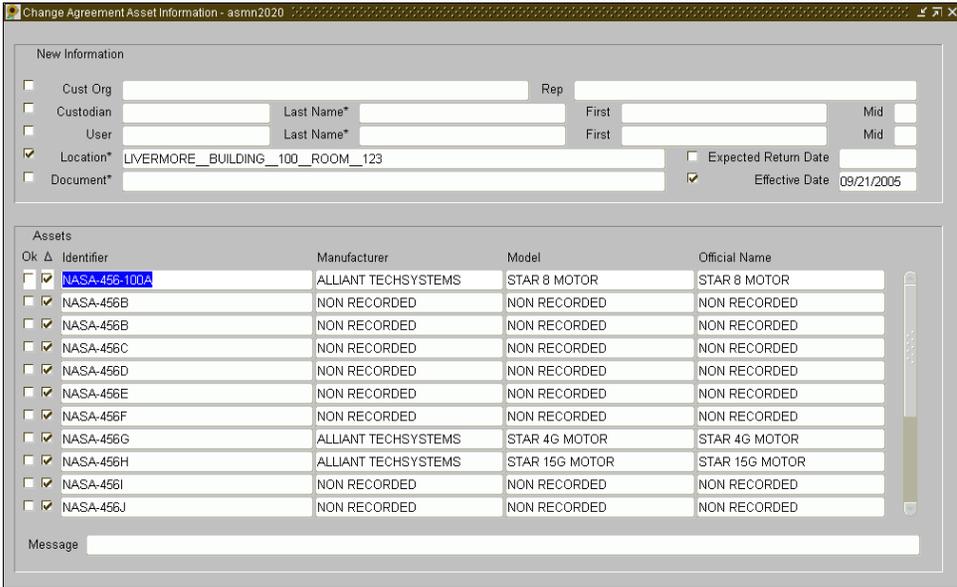


Figure 3-27: Transferring Multiple Asset Records to a New Location

- Step 1.** Select (check) the items that you want to apply changes for selected assets. In this example, we are updating the **Location** for the assets assigned to the NASA-456 contract.
- Step 2.** Enter the new location information of the assets by double-clicking in the **Location** complex field in the **New Information** block.
- Step 3.** Similar changes can be made for the **Cust Org** (Custodian Organization), **Custodian**, **User** and **Document** fields.
- Step 4.** To return only the assets assigned to the NASA-456 contract, place the cursor in the **Identifier** field of the **Assets** block and click the **Find** icon to open the **Query Criteria** screen. Enter the Contract ID in the **Agreement Identifier** field and click the **Execute** button to execute the query. The query searches and retrieves from the database the assets assigned to the selected steward and displays them in the **Assets** block. You can now assign the new location to all or some of the assets assigned to the NASA-456 contract.

NOTE: You can deselect any assets that you do not want to apply changes to by unchecking the delta checkbox next to the inventory asset identifiers.

- Step 5.** Click the **Save** icon to save your changes to the selected assets.

MAINTAIN AGREEMENT ASSET ONGOING EVENTS

Sunflower uses the concept of **Ongoing Events** to support the various activities that occur during an asset's lifecycle. For example, an asset may require a periodic diagnostic test to validate whether the asset is in proper working order or if the asset requires maintenance. Use the **Maintain Agreement Ongoing Events** screen to record each instance that the designated asset receives diagnostic testing and record the maintenance of the asset. This provides you with an up-to-date history of your assets and their maintenance records.

NOTE: Sunflower automatically captures factory delivered ongoing events that occur for Sunflower transactions. The **Maintain Agreement Asset Ongoing Events** screen provides a mechanism for you to capture ongoing events that you create in addition to the factory delivered values using the Administration module **Maintain Asset Event Types** screen such as a Maintenance ongoing event.

Scenario: The following graphic illustrates how to captures an ongoing event for maintenance. In this example, the NASA-456 asset is being sent out for routine maintenance.

NAVIGATION

- Click Agree
- Click Maintain Agreement Asset Ongoing Events

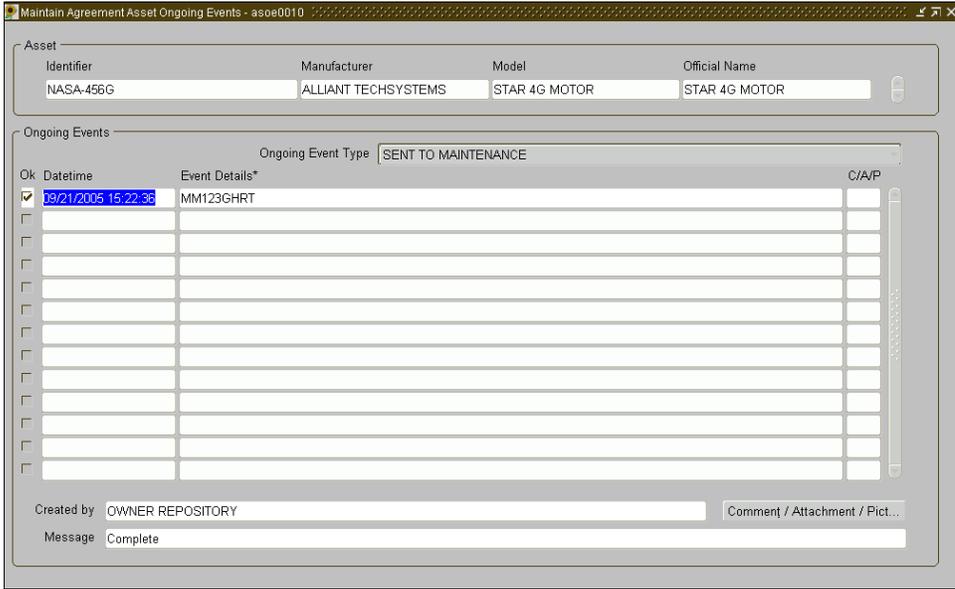


Figure 3-28: Maintain Agreement Asset Ongoing Events Screen

Step 1. Navigate to the **Maintain Agreement Assets Ongoing Events** screen.

Step 2. Enter a asset identifier in the **Identifier** field.

NOTE: After entering a value in a field, hit the Tab key to move to the next field. Sunflower automatically populates default values when defaults are available.

Step 3. Select the ongoing event from the LOV in the **Ongoing Event Type** field. In this example, it is *Maintenance*.

Step 4. Click the **Comment/Attachment/Pict...** button to enter any comments relevant to this asset and its ongoing event.

Step 5. Click the **Save** icon to save the changes to the asset's property records.

TRANSFER AGREEMENT ASSETS

Like the **Maintain Agreement Assets** screen, you can use the **Transfer Agreements** screen to transfer assets from one agreement, event, contract, etc. to another. However, the **Transfer Agreements** screen enables you to transfer a single agreement asset or multiple agreement assets in one step. For example, your organization may have an office move and you want to update the agreement asset location for each custodian that is moving. Rather than changing each item one at a time, you can edit every asset record assigned to a custodian by entering that custodian's information on the **Transfer Agreements** screen. This returns all of the agreement assets assigned to that custodian. When you update the **Location** information for that custodian, all of the assets assigned to that custodian can be updated at once.

Scenario: The following graphic illustrates how to transfer en masse, agreement assets from their current agreement to a new agreement. In this example, Lease 1998-01-01 is going to be replaced by lease 1999-01-01. Transfer all of the assets associated with the 1999-01-01 Lease to the 2000-01-01 Lease. In addition, change the user to Carl Miller who is located at the Livermore site in building 121, room 101.

NAVIGATION

- Click Agree
- Click Transfer Agreements

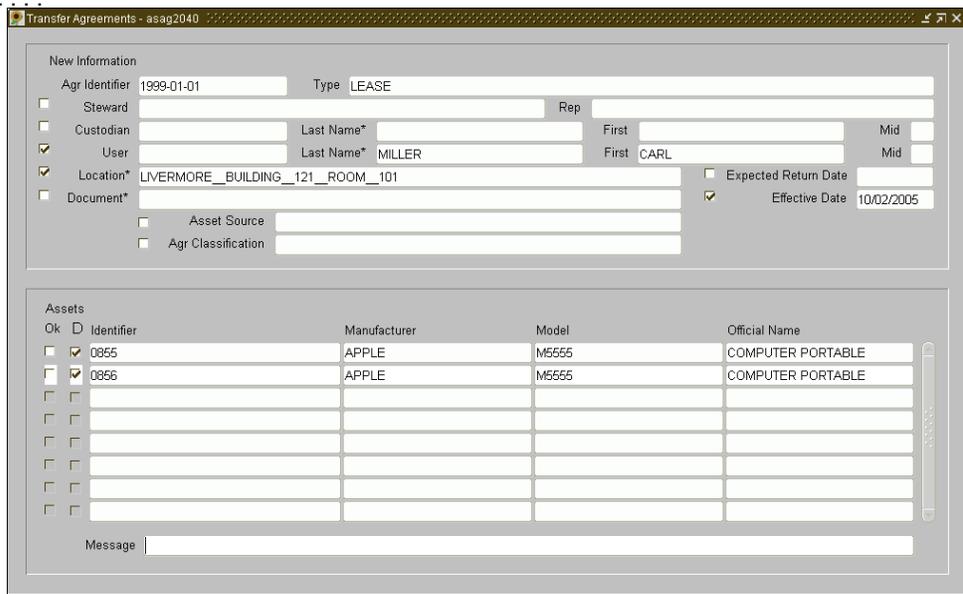


Figure 3-29: Transferring Agreement Asset Records to Another Agreement

- Step 1.** Navigate to the **Transfer Agreements** screen.
- Step 2.** Enter the new agreement identifier in the **Agr Identifier** field.
- Step 3.** Enter the new user information in the **User** field.
- Step 4.** Enter the new location information in the **Location** complex field. Double-click the **Location** field to open the complex field and enter the new location.
- Step 5.** Place your cursor in the **Identifier** field of the **Assets** block. Click the **Find** icon to open the **Query Criteria** screen. Enter the existing agreement identifier in the **Agreement Identifier** field and click the **Execute** button to execute the query. The query searches and retrieves from the database the agreement assets assigned to the selected agreement identifier and displays them in the **Assets** block.
- Step 6.** Similarly, If you want to return only the assets assigned to a user, place the cursor in the **Identifier** field of the **Assets** block and click the **Find** icon to open the **Query Criteria** screen. Enter the **User's** name in the **Assigned To** field, a corresponding **Agreement Identifier** and click the **Execute** button to execute the query. The query searches and retrieves from the database the agreement assets assigned to the selected user and agreement and displays them in the **Assets** block.
- NOTE:** You can deselect any assets that you do not want to apply changes to by unchecking the delta checkbox next to the inventory asset identifiers.
- Step 7.** Save to commit the changes to the selected assets.

TRANSFER AGREEMENT ASSET VALUE

The **Transfer Asset Value** screen provides the ability to transfer values of any interest asset to another asset of the same interest type. Use the **Transfer Agreement Asset Value** screen to transfer the agreement asset value from one asset to another agreement asset.

Scenario: The following graphic illustrates how to transfer asset value from one agreement asset to another. In this example, the agreement asset, NASA-456G, value is being transferred to the agreement asset NASA-456H.

NAVIGATION

- Click Agree
- Click Transfer Agreement Asset Value

The screenshot shows a web application window titled "Transfer Agreement Asset Value - asmn2190 (Page 1 of 2)". The interface is divided into two main sections: "To" and "From".

To Section:

Identifier	NASA-456G		
Manufacturer	ALLIANT TECHSYSTEMS	STAR 4G MOTOR	STAR 4G MOTOR
Asset Type	SPACEVEH	SPACE VEHICLES	
Acquisition Date	09/09/2005		Flags
Activity Status	IN SERVICE	Activity Type	
Document*			
User Fields*			
Global User Fields*			

From Section:

	Identifier	Asset Value	Total Transfer Value*
Identifier	NASA-456H	\$100,000.01	
Manufacturer	ALLIANT TECHSYSTEMS	STAR 15G MOTOR	STAR 15G MOTOR

At the bottom of the screen, there are two buttons: "Page 2" and "Comment".

Figure 3-30: Transfer Agreement Asset Value to Another Asset

- Step 1.** Navigate to the **Transfer Agreement Asset Value** screen.
- Step 2.** Enter the identifier that you want to transfer value to in the in the **Identifier** field of the **To** block.
- Step 3.** Enter the identifier that you want to transfer value from in the in the **Identifier** field of the **From** block.
- Step 4.** Click the **Comment** button to enter any comments relevant to this agreement asset value transfer transaction.
- Step 5.** Click the **Save** icon to complete the transfer of value to the selected agreement asset.

INACTIVATE AGREEMENT ASSETS

When assets are not in active use, you may choose to store them. Sunflower helps you to manage assets that are not in use through the Inactive module. The Inactive module provides a way to collect and track assets that are not in use. People can be made aware of the stored assets, which may be available for reuse by others for a predefined period-of-time while the owning organization is not using their assets.

The Inactive module provides an effective way to manage storage facilities. For example, there are many cases when assets are ordered for pending projects and the owning organization is not yet ready to utilize the asset. This asset may require special storage that can be better handled by a warehouse facility that manages the receipt and storage of assets. Alternatively, an asset could be used and in good condition but your organization has no further use for the asset. By sending the asset to an inactive storage facility, you give your entire enterprise the opportunity to search for assets that may be put back into service. Instead of purchasing a brand new asset, the asset can be reused, reducing the costs of purchases for an asset supporting the goals of your entire enterprise. Lastly, there are certain assets that require very specific storage conditions; the Inactive module enables you to specify unique requirements related to your assets so that your assets are stored in the proper condition.

Creation of an inactive asset is a two-part process performed by an individual in the owning organization (e.g. Agreement Clerk) and an Inactive Clerk. The Agreement Clerk initiates the request to store an asset by creating an inactive receival request. The request is received by the Inactive Manager who can then approve the request by creating what is known as an inactive asset from the inactive receival request. From here, the inactive manager will coordinate the appropriate personnel to pickup (if required) and store the requested assets.

Sunflower provides the Inactive module to handle inactive assets requests for agreement assets and inventory assets. This section will cover inactive asset process for an agreement asset. The discussion provided here is also applicable to inventory assets. To learn more about storing agreement assets by using the Inactive module refer to the following sections:

- “Agreement Asset Inactive Receival Request” on page 258
- “Withdraw Inactive Receival Request” on page 260
- “Request Inactive Asset Redeployment” on page 261
- “Withdraw Inactive Redeployment Requests” on page 263

AGREEMENT ASSET INACTIVE RECEIVAL REQUEST

Use the **Request Agreement Asset Inactive Receival** screen to initiate the storage process. The inactive receival screen provides the ability to either request the pickup and storage locations for an inactive asset or to store the asset in its current location. Additionally, use this screen to specify details such as the duration of storage, whether the asset may be used by others while stored, a recharge ID to charge against for any cost incurred to move and store an asset, unique requirements or general comments.

Scenario: The following graphic illustrates how to request to inactivate an asset, 0455, a portable computer, for 6 months in a controlled environment. During the interim, this asset will be available to others for use.

NAVIGATION

- Click **Inactive**
- Click **Request Inactive Receival**
- Click **Request Agreement Asset Inactive Receival**

Request Information

Make inactive in-place?

Pick-up Location *

Deliver-to Location *

Assets

Ok	△	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0455	APPLE	M5555	COMPUTER PORTABLE

Request No 1118 Inactive Type CONTROLLED STORAGE

Available to others? Y Duration (yrs) Recharge Identifier

User ADM09 Last Name* NINE First ADM Mid

Unique Rqmts

Comment May be loaned out during inactive period.

Message Complete

Figure 3-31: The Request Agreement Asset Inactive Receival Screen

- Step 1.** Navigate to the **Request Agreement Asset Inactive Receival** screen.
- Step 2.** Enter the inactive request pickup and deliver to locations.
- Step 3.** You have the option of making the inventory asset inactive but not moved to a storage facility by selecting the **Make inactive in-place?** checkbox. This checkbox also overrides the **Pick-up Location** and **Deliver-to Location** fields.
- Step 4.** In some cases, it may be more practical for you to store the inactive asset in a designated area that your organization can control according to the asset's requirements. Use the inactive in-place option to accommodate this type of business practice.
- Step 5.** Enter the asset identifier in the **Identifier** field for the item you are requesting an inactive receival. In this case, the asset identifier is **0455**. The **Manufacturer**, **Model**, and **Official Name** fields automatically populate.
- NOTE:** The **Request No** (Number) is auto-generated upon saving. This number is used for tracking and reporting, and if required to withdraw the request.
- Step 6.** Use the **Inactive Type** field to select the type of storage required for the asset. In this example, it is the default value, **CONTROLLED STORAGE**. You can specify detailed storage instructions with the Unique Requirements text box below.
- Step 7.** Specify whether the asset is available for loan (**Y** for Yes or **N** for No) to others during its inactive period.
- Step 8.** Enter the duration of the asset's inactive period in the **Duration (yrs)** field. The length of the inactive period is designated in years (e.g, 0.5 = 1/2 year). This optional.
- Step 9.** Enter the account to charge storage and related costs for the inactivating the asset in the **Recharge Identifier** field.
- Step 10.** Specify any special considerations for the handling and storage of the asset (e.g. hazard, special storage needs, etc.) in the **Unique Rqmts** text box.
- Step 11.** Specify any general comments (e.g. pick up times, etc.) in the **Comment** text box.
- Step 12.** Click the **Save** icon to save your request. Notice the system generated request number. In this case, it is **1118**. This number is used to complete the agreement asset inactive receival request later.

WITHDRAW INACTIVE RECEIVAL REQUEST

Use the **Withdraw Inactive Receival Request** screen to withdraw a prior request to inactivate an asset. You will need the **Request No** (**1118** from our last example) that you obtain upon saving your agreement asset inactive receival request in order to perform this action.

Scenario: The following graphic illustrates how to withdraw an inactive request. In this example, it is request number, **1118, taken** from our previous example.

NAVIGATION

- Click **Inactive**
- Click **Withdraw Inactive Receival**

Withdraw Inactive Receival Request - asmn2120

Request No	Identifier	Manufacturer	Model	Official Name
1118	AGR 0455	APPLE	M5555	COMPUTER PORTABLE

Inactive Type: CONTROLLED STORAGE

Available to others?: Y Duration (yrs): Recharge Identifier:

Pick-up Location:

Deliver-to Location:

User: NINE ADM ADM09

Unique Requirements:

Comment: May be loaned out during inactive period.

Message:

Figure 3-32: The Withdraw Inactive Receival Request Screen

- Step 1.** Navigate to the **Withdraw Inactive Receival Request** screen.
- Step 2.** Enter the inactive request number that you generated when you made the original request to inactivate the asset in the **Request No** field. In this case, it is request number, **1118**. Click the Tab key to bring up the asset information.
- Step 3.** Click the **Save** icon to withdraw your inactive receival request.

REQUEST INACTIVE ASSET REDEPLOYMENT

When a user locates an asset that they would like to use, a request for redeployment can be created and sent to the organization handling your inactive assets (e.g. warehouse or facilities management) The creation of a redeployment request notifies the appropriate party that the requested inactive asset has been changed to an active status and redeployed to the requestor for use during the predefined storage duration. This section will show you how to redeploy an inactive agreement asset using the **Request Inactive Asset Redeployment** screen.

Scenario: The following graphic illustrates how to an inactive asset redeployment form for inactive asset IXX01, a desk, that is requested to be delivered by the end of the month to Building E, Room XX in Livermore.

NAVIGATION

- Click **Inactive**
- Click **Request Inactive Asset Redeployment**

Request Inactive Asset Redeployment - asin2130

Request Information

Deliver-to Location * LIVERMORE_BUILDING_E_ROOM_XX

Assets

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> IXX01	STEELCASE	DESK 6 FT	DESK 6 FT

Request No 1103

Comment

Message Complete

Figure 3-33: The Request Inactive Asset Redeployment Screen

- Step 1.** Navigate to the **Request Inactive Asset Redeployment** screen.
- Step 2.** Specify the address for delivery of the asset that you want to redeploy by double-clicking in the **Location** field and entering the relevant information.
- Step 3.** Enter the asset identifier of the inactive asset that you want to redeploy in the **Identifier** field. Click the Tab key to populate **Manufacturer**, **Model**, and **Official Name**.
- Step 4.** Use the **Comment** text box to specify any special circumstances or delivery considerations.
- Step 5.** Click the **Save** icon to save your redeployment request. The system generates a redeployment **Request No** (Number).

WITHDRAW INACTIVE REDEPLOYMENT REQUESTS

Use the **Withdraw Inactive Redeployment Request** screen to withdraw a request to re-use an inactive asset.

Scenario: The following graphic illustrates how to issue a redeployment withdrawal request for asset IXX01, a desk using the request number, 1161, generated from the initial redeployment request.

NAVIGATION

- Click **Inactive**
- Click **Withdraw Inactive Redeployment Request**

Ok Request No	Identifier	Manufacturer	Model	Official Name
<input type="checkbox"/> 1103	INA IXX01	STEELCASE	DESK 6 FT	DESK 6 FT

Deliver-to Location: LIVERMORE_BUILDING_E_ROOM_XX

Comment: [Empty text area]

Message: [Empty text area]

Figure 3-34: The Withdraw Inactive Redeployment Request Screen

- Step 1.** Navigate to the **Withdraw Inactive Redeployment Request** screen.
- Step 2.** Enter the request number (**1161**) from the original Inactive Asset Redeployment Request.
- Step 3.** Click the Tab key to populate the screen.
- Step 4.** Click the **Save** icon to withdraw your request.

RETIRE AGREEMENT ASSETS AND AGREEMENTS

Part of the management process when working with agreements is the monitoring of project time lines and identifying those assets that are tied to agreements with up-and-coming scheduled end dates. As the scheduled end date for an agreement nears, your organization should contact the current user of the asset to verify the status of the asset. If the current user requests an extension to the agreement, then you should determine if your organization has a need for the asset. If your organization decides to extend the loan, then you need to update the agreement for the new scheduled end date.

If an agreement is not extended then subsequent actions will be depend on one of the following:

- If the asset is returned, deemed to be serviceable, and required, then the asset can be placed back into service.
- If the property is not returned, you will need to determine whether the asset is abandoned property. If the asset is abandoned, you can retire the asset with the appropriate final event type (e.g. Abandoned).
- If the asset is returned, but is no longer usable, then the asset can be excessed (disposed)

It is important to emphasize that retirement is not the same as disposal. Retirement is the process of removing an asset from an agreement. Disposal is the removal of an asset altogether.

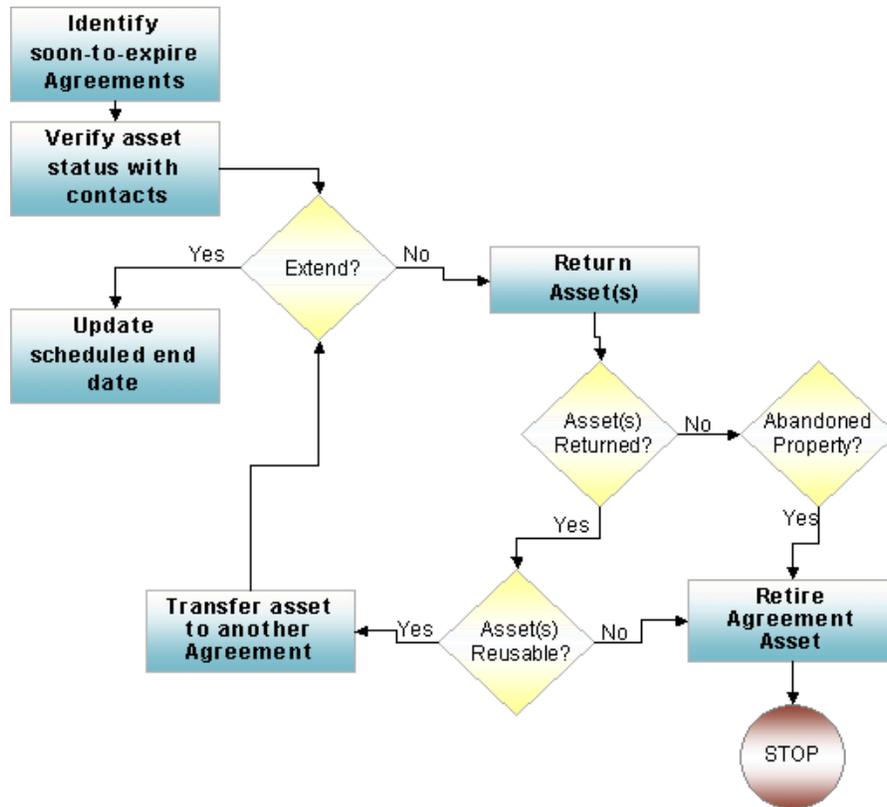


Figure 3-35: Retirement Flow Chart

The retirement of an agreement and its associated assets consists of the following steps:

1. Retire agreement assets
2. Retire the agreement after all of the agreement assets associated with the agreement have been removed (retired, transferred, etc.).
3. Optionally, reinstate an agreement asset.

For information on the excess process refer to “Excess Agreement Assets” on page 272.

RETIRE AGREEMENT ASSETS

Use the **Create Agreement Asset Final Events** screen to retire agreement assets. Retirement of an asset, or group of assets, removes the asset(s) from the agreement and from the general agreement inventory with a specified retirement type (e.g. returned, abandoned, scrap etc.). Once retired, the asset is no longer available for view from the **Maintain Agreements** or **Maintain Agreement Summary and History** screen. From this point forward, details for the retired assets are available through the use of reports.

Retiring an agreement asset does not retire the other associated interest assets types (e.g. inventory management, inactive, etc.) unless the system has been setup to do so. This type of setup is an administrative function that can be defined with the **Maintain Valid Asset Event Types** screen located in the Administration module, under the **Domains** sub-menu list. Additionally, retirement of the agreement asset does not retire the agreement to which the asset was tied. Retiring an agreement is a separate subsequent step, see “Retire an Agreement” on page 268.

Scenario: The following graphic illustrates how to retire the agreement asset, XX60, with a retirement type of returned.

NAVIGATION

- Click Agree
- Click Create Agreement Asset Final Events

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	XX60	APPLE	M5555	COMPUTER PORTABLE
<input type="checkbox"/>				

Message Complete

Figure 3-36: Retiring Agreement Assets

Step 1. Navigate to the **Create Agreement Asset Final Events** screen.

Step 2. Enter the retirement date (*06-13-2005*) in the **Date field**. Defaults to the current date.

Step 3. Specify the final event type in the **Final Event** field.

Final Event is a key field that defines the reasons for the retirement (e.g. abandoned, returned, etc.).

If the final event type you require is not available, then create the final event type by using the Administration module **Maintain Valid Asset Event Types** screen.

Step 4. Specify additional details in the **User Fields** if the final event that you select has been extended.

Step 5. Double-click in the **Document** field to open the **Maintain Documents** screen and enter any documentation to support the retirement of the agreement asset.

Step 6. Enter the agreement asset identifiers that you are retiring in the **Identifier** field. In this example, the agreement asset identifier is *XX60*. The fields automatically populate with the manufacturer, model number and official name of the asset.

Step 7. Click the **Save** icon to retire the agreement asset.

RETIRE AN AGREEMENT

The retirement of an agreement does not retire the assets that are associated with the retired agreement. This act simply prevents you from adding new assets to the retired agreement.

While it is possible, it is not recommended to leave active agreement assets associated to a retired agreement. Use the **Create Agreement Assets Final Events** screen to retire agreement assets. For more information, see “Retire Agreement Assets and Agreements” on page 264.

To retire an agreement, use the **End Date** field on the **Maintain Agreements** screen to specify the last day that the agreement is valid. By assigning an end date, you prevent the addition of any new assets to an agreement beyond the end date.

Scenario: The following graphic illustrates how to retire an agreement by specifying an end date of June 15, 2005 for agreement 2000-XX-01.

NAVIGATION

- Click Agree
- Click Maintain Agreements

The screenshot shows a web application window titled "Maintain Agreements - asag2020 (Page 1 of 6)". The main content area is titled "Agreements" and contains several input fields:

- Identifier: 2000-XX-01
- Type: LEASE
- Parent Identifier: (empty)
- Type: (empty)
- Begin Date: 07/01/2005
- Scheduled End Date: 07/01/2006
- End Date: 06/15/2005 (highlighted in blue)
- Agr User Fields*: (empty)

Below the main fields are two sections for user information:

- Entered into by:**
 - Organization: ASSET CENTER XX
 - Sponsor: HUMAN RESOURCES
- Entered into with:**
 - Organization: ACME RESOURCES
 - Or Person: (empty)
 - Last Name*: (empty)
 - First: (empty)
 - Mid: (empty)

At the bottom of the form are several buttons: Contacts, Valid sources, Modifications, authorized, aSsets, and Text.

Figure 3-37: Retiring Agreements with the Maintain Agreements Screen

- Step 1.** Navigate to the **Maintain Agreements Assets** screen.
- Step 2.** Select the appropriate agreement. Enter the agreement identifier in the Identifier field for the new agreement. In this case, the agreement identifier is *2000-XX-01*. The fields will automatically populate with the information associated with this agreement.
- Step 3.** Enter the actual End Date (*06-15-2005*) of the agreement when an agreement concludes. Leave blank until that time. This action prevents you from adding assets to the agreement once the End Date is reached.
- Step 4.** Click the **Save** icon to save your new agreement.

REINSTATE AGREEMENT ASSETS

The **Create Agreement Asset Final Events** screen has two purposes. You can use Create Agreement Asset Final Events screen to retire assets and to reinstate a retired asset at any time by reversing the final event. Alternatively, you can perform a reinstatement of the retired asset by entering the retired asset’s identifier in the identifier field on the **Maintain Agreement Assets** screen where a prompt message will inform you that this action will re-activate the asset, thereby reinstating the asset.

Scenario: The following graphic illustrates how to reinstate an asset, *0360*, using the Create Agreement Asset Final Events screen.

NAVIGATION

- Click Mgmt
- Click Create Agreement Asset Final Events

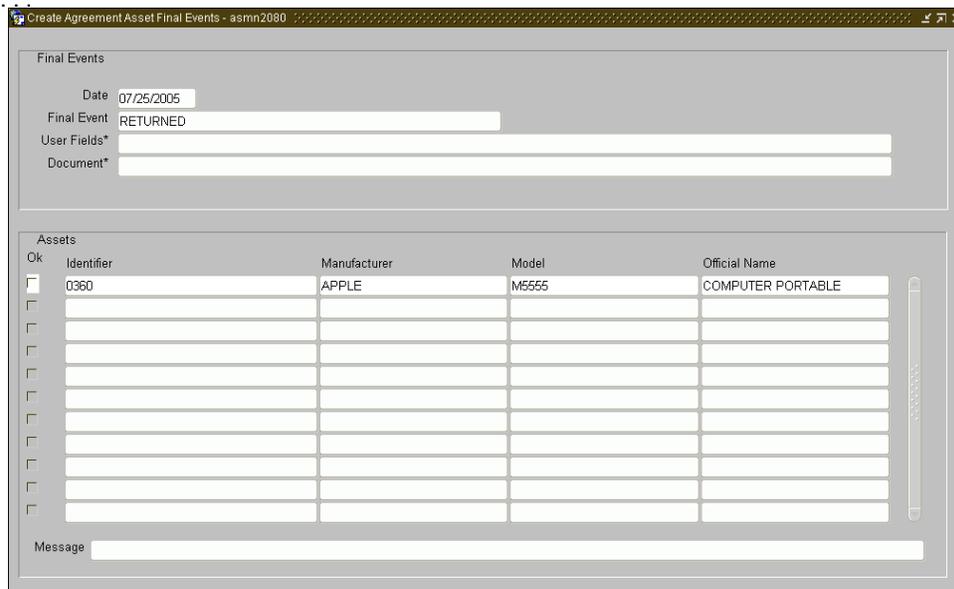


Figure 3-38: Reversing a Final Event

Step 1. Navigate to the **Create Agreement Asset Final Events** screen.

Step 2. Specify the date of the agreement asset final event. The current date is the default value.

If you do not know the exact date, you can search for the agreement asset by clicking the **Find** icon and scrolling through the records with the **Next Record** and **Previous Record** icons.

Step 3. Select the event type from the list of values (LOV) from the **Asset Final Event** field for the inventory asset. In this example, the asset final event type is *Returned*. Click the **Find** icon to search the database.

Step 4. Place cursor in the **Identifier** field for the asset that you want to reverse. In this case, the retired asset, *0360*.

Step 5. Click the **Remove Record** icon to remove the indicated asset record.

Step 6. Click the **Save** icon to reinstate the selected asset.

EXCESS AGREEMENT ASSETS

When an asset reaches the end of its active life and is no longer useful, create an excess receipt request to dispose of that asset. Sunflower calls the process of removing an asset from your organization's physical and financial accountability **excess**. Proper and efficient disposal of excess material is an important and sensitive matter that can be subject to government regulations. The excess process includes the creation of **excess receipt request** to transition the active asset into an excess asset. The appropriate party or organization responsible for receiving, reviewing and acting upon requests can either deny, accept or withdraw a request. If accepted, the asset in question becomes an **excess asset**.

Once an asset is in excess, it may go through one or more **excess review cycles** depending upon the condition, type and other factors specified by your organization that will indicate the prioritization, duration and organizations to which the asset is available for review. The review cycle enables organizations to search for excess assets and if desired, redeploy these assets into their organization for reuse. The redeployment of excess assets is performed by creating an **excess asset reservation**. This process can remove the assets from the excess process and transition it back to an active status for the requesting organization. If an excess asset is not redeployed after a predetermined period of time (specified by your organization), the asset can be **retired**. While the excess process is not specific to agreement assets, the discussion provided in this section addresses the excess process and highlights the nuances of excessing agreement assets.

Excess receipt requests enable users who do not have the authority to directly create an excess asset to request an asset for disposal.

This section discusses how to:

- "Request Agreement Asset Excess Receipt"
- "Withdraw Agreement Asset Excess Receipt"
- "Utilize Excess Assets"
- "Create Excess Asset Reservations"

For information on the retirement process see "Retire Agreement Assets and Agreements" on page 264.

REQUEST AGREEMENT ASSET EXCESS RECEIVAL

Excess receival requests enable users who do not have the authority to directly create an excess asset to request an asset for disposal. Recall that users can only work with assets that are a part of the organization(s) to which they belong to or that they are authorized to work with. An authorized user can create an excess receival request and a manager that oversees the disposal of assets for your organization can generate the excess assets from the receival request.

The following example illustrates how to create an excess asset receival request for inventory assets.

Scenario: The following graphic illustrates how to an excess asset receival request for agreement asset 0456, a portable computer. The computer is used but in good condition and should be picked up from its current location in Livermore, Building E, Room 07 and sent to an excess warehouse in Livermore, Excess Building, Room RC.

NAVIGATION

- Click **Excess**
- Click **Request Excess Receival**
- Click **Request Agreement Asset Excess Receival**

Request Agreement Asset Excess Receival - asex2120

Request Information

Excess in-place?

Pick-up Location * LIVERMORE_BUILDING_E_ROOM_07

Deliver-to Location * LIVERMORE_BUILDING_EXCESS_ROOM_RC

Assets

Ok	Δ	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0456	APPLE	M5555	COMPUTER PORTABLE

Request No 1122

Asset Condition 4 USED - GOOD

Comment

Message Complete

Figure 3-39: Request Agreement Asset Excess Receival

Step 1. Navigate to the **Request Agreement Asset Excess Reveal** screen.

Step 2. Select one of the following:

- **Excess in-place?** checkbox if you want the asset to remain in its current location but in the Excess state. Selecting this option overrides the **Pick-up Location** and **Deliver-to Location** required fields.
- **Pick-up Location** of the asset that you want to excess by double-clicking in the **Location** field and entering the relevant information (shown in the figure above). Also specify the **Deliver-to Location** of the asset that you want to excess by double-clicking in the **Location** field and entering the relevant information.

Step 3. Enter the asset identifier of the inventory asset that you want to excess in the **Identifier** field. Click the Tab key to populate **Manufacturer**, **Model**, and **Official Name**.

Step 4. Select the asset condition that best describes the asset's current state.

Step 5. Use the **Comment** text box to specify any special circumstances or delivery considerations.

Step 6. Click the **Save** icon to save your redeployment request. The system generates a redeployment **Request No** (Number).

WITHDRAW AGREEMENT ASSET EXCESS RECEIVAL

Once you have made a request to excess an asset, you can withdraw the request as long as the assets has not been converted to an excess asset. Use the **Withdraw Excess Receival Request** screen to withdraw a request to excess an asset. To withdraw a request you must use the request number generated for the excess receival.

Scenario: The following graphic illustrates how to withdraw an excess receival request, for the agreement asset 0456 using the generated request number, 1122, generated when the excess receival request was created.

NAVIGATION

- Click **Excess**
- Click **Withdraw Excess Receival Request**

Ok Request No	Identifier	Manufacturer	Model	Official Name
<input type="checkbox"/> 1122	AGR 0456	APPLE	M5555	COMPUTER PORTABLE

Asset Condition: 4 USED - GOOD

Pick-up Location: LIVERMORE_BUILDING_E_ROOM_07

Deliver-to Location: LIVERMORE_BUILDING_EXCESS_ROOM_RC

Comment:

Message:

Figure 3-40: The Withdraw Excess Receival Request Screen

- Step 1.** Navigate to the **Withdraw Excess Receival Request** screen.
- Step 2.** Enter the request number, **1122**.
- Step 3.** Click the Tab key to populate the screen.
- Step 4.** Click the **Save** icon to withdraw your request.

UTILIZE EXCESS ASSETS

Excess assets are generated daily, weekly or otherwise depending upon the policies and procedures of your organization. Once generated, excess assets are placed into a review cycle that goes through one or more review periods. The review cycle enables authorized personnel to search for assets that are available for reuse. Review periods are beneficial to your organization because they enable users to find assets that have been designated as reusable excess assets that in many cases, are more cost effective than purchasing a new asset. Depending upon your policies you may choose to post a list of excess assets to a web page for users outside of your organization or for those who do not have access to Sunflower. Users within the organization that have access to Sunflower can review the list of excess assets by either using reports or the Asset Search screen. The following scenario illustrates how to use the Asset Search screen to review a list of excess assets.

There are a variety of ways to search for excess assets that are available for use by your organization. The following methods are available to search for available excess assets in your database:

- “Use Asset Search” (online search)
- “Asset Search Report”
- “Excess Asset Report”

USE ASSET SEARCH

Use the **Asset Search** screen to find assets that have been designated as excess. You can utilize an existing asset that is available for use by placing an excess asset reservation with the organization that is storing the unused asset.

Scenario: The following graphic illustrates how to use the **Asset Search** screen to discover excess assets that are available for reutilization.

NAVIGATION

- Click Agree
- Click Asset Search

The screenshot shows the 'Asset Search' application window with the following search criteria:

- Manufacturer: [Empty]
- Model: [Empty]
- Official Name: [Empty]
- Model Name: [Empty]
- Serial Number: [Empty]
- Asset Type: AUTOMATED DATA PROCESSING EQUIPMENT
- Asset Value: [Empty]
- Minimum Acquisition Date: [Empty]
- FSC: [Empty]

Search filters are set to:

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

The Assets table displays the following data:

Identifier	Manufacturer	Model	Official Name
EXC EX002	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0102	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0202	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0302	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0402	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0502	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0602	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0702	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0802	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E0902	HEWLETT-PACKARD	9000	COMPUTER MINI
EXC E1002	HEWLETT-PACKARD	9000	COMPUTER MINI

A 'Report' button is located at the bottom of the table.

Figure 3-41: Using Asset Search to Find Excess Assets

Step 1. Navigate to the **Asset Search** screen.

- The **Asset Search** screen is available from the Agreement, Management, Finance, Inactive and Excess modules.

Step 2. Specify at least one criteria in the **Search Criteria** block. In this case, *Automated Data Processing Equipment* is the selection for the **Asset Type** criteria.

Step 3. Check the **Excess Asset** checkbox to limit your asset search to excess assets.

Step 4. Click the **Find** icon to return the results of your **Asset Search** criteria.

Step 5. Optionally, click the **Report** button to generate a printable report of your search results.

1. The Asset Search report parameters page displays with pre-populated search criteria specified on the Asset Search screen.
2. Click the **Submit** button.
3. Select the report output type (e.g. Acrobat for a PDF report output).
4. Click the **eXecute** button to generate the report.

For more information about printing the Asset Report, see “Agreement Assets Report” on page 282.

CREATE EXCESS ASSET RESERVATIONS

An excess asset screening process may consist of posting the available assets to an internal website, to an E-mail distribution list, or users might generate reports (e.g. Asset Search, Excess Asset (Global Information) report) to view the list of available excess assets. During the screening process, if an organization wants one of the posted excess assets, they can either create the reservation themselves or notify the appropriate party within the excess department who can create the excess asset reservation, on the behalf of the requestor, and begin the transfer process of the asset to the requesting organization.

The following example illustrates how to create an excess asset reservation.

Scenario: The following graphic illustrates how to create an excess asset reservation for asset EXX06, an oscilloscope for the Asset Center XX organization.

- NAVIGATION**
- Click Excess
 - Click Create Excess Asset Reservation

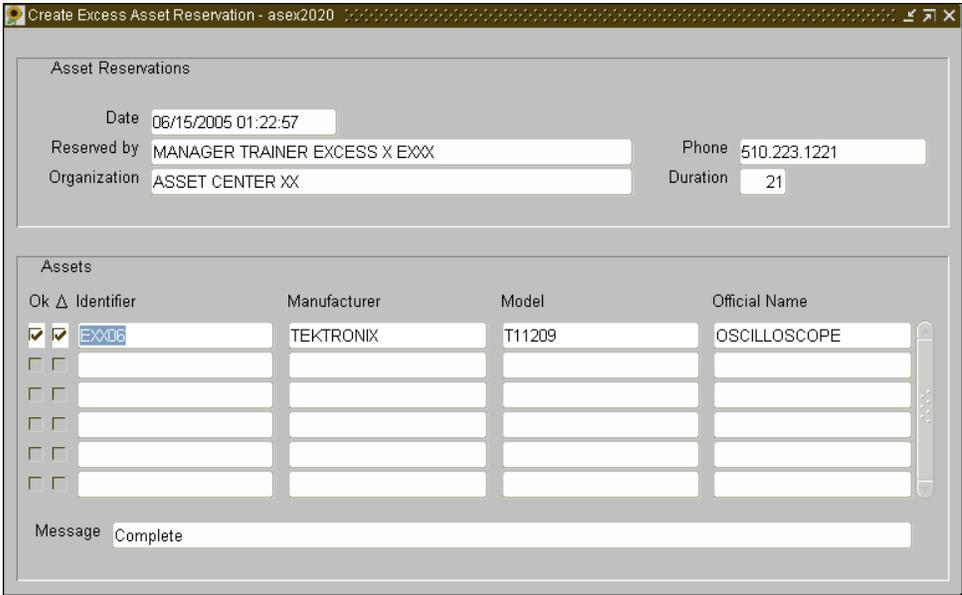


Figure 3-42: The Create Excess Asset Reservation Screen

- Step 1.** Navigate to the **Create Excess Asset Reservation** screen.
- Step 2.** Click the Tab key to populate the screen.
- Step 3.** Press the Tab key to populate the screen. The screen automatically populates the **Date**, **Reserved by**, **Phone**, and **Organization** fields (based on your login).
- Step 4.** Enter the amount of time (days) for the reservation life span in the **Duration** field.
- Step 5.** Enter the identifier of the excess asset and click the Tab key. The **Manufacturer**, **Model**, and **Official Name** populate.
- Step 6.** Click the **Save** icon to save changes to your asset reservation record.

AGREEMENT REPORTS

Sunflower provides a flexible and comprehensive web-based reporting system. The Sunflower database is queried when a report is created and executed. Reports display real-time information. Therefore, an afternoon report will differ from a morning report by reflecting any changes made during the day.

There are several output options available for your reports.

- PDF (Adobe Acrobat)
- HTML
- Text

Your outputs depend upon the report selected. Acrobat and HTML are standard options provided for most reports. Text file export is available for selected reports.

Sunflower provides the following reports to use with the Agreements module:

- “Agreement Assets Report” on page 282
- “Agreement Assets (Global Information) Report” on page 285
- “Agreement Activity Report” on page 288
- “Agreement Additions and Deletions” on page 291
- “Agreement Asset Activity Summary by Asset Flag” on page 293
- “Agreement Asset Activity Summary by Asset Type” on page 295
- “Agreement Asset Interface Processing Results” on page 297
- “Agreement Asset Ongoing Events” on page 299
- “Agreement Asset Summary by Asset Flag” on page 301
- “Agreement Asset Summary by Asset Type” on page 303
- “Agreement Asset Utilization” on page 305
- “Asset Search Report” on page 308
- “Purchase Order Aging Report” on page 311
- “Excess Asset Report” on page 314

AGREEMENT ASSETS REPORT

The **Agreement Assets** report shows the details of assets associated with agreements, (e.g. leases, warranties and grants).

Scenario: The following graphic illustrates how to use the **Agreement Assets** report for agreement 1999-XX-01 from which you can review the selection criteria as well as review the detail and summary information of agreement assets associated to this agreement.

Use the **Agreement Assets** report to display agreement asset details based on selected criteria. To run a report perform the following basic steps:

- Step 1.** Navigate to the **Agreement Reports** screen as follows: Click the **Agreement Assets** report to display the **Report Parameters** selection screen.
- Step 2.** Specify desired parameters by selecting and/or entering report criteria.
- Step 3.** Click the **Submit** button.
- Step 4.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 5.** Click the **eXecute** button to generate the report.

 Sunflower Applications - Production 4.0.0.0 Agreement Reports

ASAG6010 Agreement Assets

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

Agreement Identifier: 1999-XXX-01 Type: LEASE

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: _____

You can use '*' as a wildcard character in the Identifier, Last Name, First and Mid fields

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

Assets As Of: _____ (MM/DD/YYYY)

Manager: _____
 Owner: _____
 Steward: _____

Include the Steward's Child Organization

Custodian Identifier: _____ Last Name: _____ First: _____ Mid: _____ Prefix: _____ Suffix: _____

You can use '*' as a wildcard character in the Identifier, Last Name, First and Mid fields

User Identifier: _____ Last Name: _____ First: _____ Mid: _____ Prefix: _____ Suffix: _____

You can use '*' as a wildcard character in the Identifier, Last Name, First and Mid fields

Location Site/Off-Site Type: _____ Structure Level 1 Type: BUILDING Structure Level 1: _____ Structure Level 2 Type: ROOM Structure Level 2: _____

Official Name: _____
 Manufacturer: _____
 Model: _____
 FSC/National Stock Number: _____

Asset Type Category(z):

- All
- COMMODITY
- LAND
- PERSONAL PROPERTY
- REAL PROPERTY

Asset Type(s):

- All
- AUTOMATED DATA PROCESSING EQUIPMENT
- BUILDINGS
- LABORATORY EQUIPMENT
- MISCELLANEOUS
- MOTOR VEHICLES
- OFFICE EQUIPMENT
- SPACE VEHICLES

Asset User Fields: _____

Asset Initial Event: _____

Figure 3-43: Agreement Assets Report Parameters

AGREEMENT ASSETS REPORT OUTPUT

Use the **Agreement Assets** report output to review detail and summary information of agreement assets. The following report reveals the assets associated with the *1999-XX-01* agreement.

Sunflower Assets		Agreement Assets				Page 3 of 5	
ASAG6010						07/21/2005 16:31	
Identifier : LEASE - 1999-XX-01		Parent :					
Begin Date : 01/01/1999		Scheduled End Date : 01/01/2001		End Date :			
Organisation By : SUNFLOWER SYSTEMS		Organisation With : ACME RESOURCES					
Sponsor : HUMAN RESOURCES							
Internal Contacts		External Contacts					
Initiated By : FRAZIER KRISTEN S 020866		Initiated By : SMITH JOHN O SM01					
Agreement Admin : FRAZIER TIMOTHY M 050167		Agreement Admin :					
Property Admin :		Property Admin :					
Agr User Fields :							
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Quantity
XX55		COMPUTER PORTABLE	APPLE	M5855	XX55	\$ 6,500.00	1
Steward : SUNFLOWER SYSTEMS				Location : LIVERMORE			
Custodian : FRAZIER KRISTEN S 020866		925.371.0136		BUILDING : 121 ROOM : 101			
User :							
Asset Type(s) : AUTOMATED DATA PROCESSING EQUIPMENT		FSC/NSN : 7021					
Source :							
Alternate Ids :							
XX56		COMPUTER PORTABLE	APPLE	M5855	XX56	\$ 6,500.00	1
Steward : SUNFLOWER SYSTEMS				Location : LIVERMORE			
Custodian : FRAZIER KRISTEN S 020866		925.371.0136		BUILDING : 121 ROOM : 101			
User :							
Asset Type(s) : AUTOMATED DATA PROCESSING EQUIPMENT		FSC/NSN : 7021					
Source :							
Alternate Ids :							
LEASE - 1999-XX-01 Total :						\$ 13,000.00	2

Figure 3-44: Agreement Assets Report

AGREEMENT ASSETS (GLOBAL INFORMATION) REPORT

The **Agreement Assets (Global Information)** report shows detail and summary information of assets associated with an agreement. Use the **Agreement Assets (Global Information)** report to display agreement details as well as all assets associated with an agreement. To run a report perform the following:

- Step 1.** Select either **Agree > Agreement Reports** or **Reports > Agreement Reports**.
- Step 2.** Click the **Agreement Assets (Global Information)** report.
- Step 3.** Specify criteria on the Report Parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



Sunflower Applications - Production 4.0.0.0 Agreement Reports

ASMN6030 Agreement Assets (Global Information)

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

Manager
 Owner
 Steward
 Include the Steward's child Organizations

Official Name
 Manufacturer
 Model

Custodian

Identifier	Last Name	First	Mid	Prefix	Suffix
<input type="text"/>					

You can use '%' as a wildcard character in the Identifier, Last Name, First and Mid fields

User

Identifier	Last Name	First	Mid	Prefix	Suffix
<input type="text"/>					

You can use '%' as a wildcard character in the Identifier, Last Name, First and Mid fields

Agreement

Identifier	Type
<input type="text" value="2000-XX-01"/>	<input type="text" value="LEASE"/>

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

Location

Site/Off-Site Type	Structure Level 1 Type	Structure Level 1	Structure Level 2 Type	Structure Level 2
<input type="text"/>	<input type="text" value="BUILDING"/>	<input type="text"/>	<input type="text" value="ROOM"/>	<input type="text"/>

Assets As Of (MM/DD/YYYY)
 Agreement Asset Identifier
 Serial Number

Document

Identifier	Document Type
<input type="text"/>	<input type="text"/>

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

Include Only Assets With Expected Return Date?

Figure 3-45: Agreement Assets (Global Information) Report Parameters Page

AGREEMENT ASSETS (GLOBAL INFORMATION) REPORT OUTPUT

Use the **Agreement Assets (Global Information)** report output to review detail and summary information of assets associated with an agreement. The following report reveals the assets associated with the **2000-XX-01** agreement.

Sunflower Assets		Agreement Assets (Global Information)					Page 3 of 5	
ASMN6030							07/21/2005 15:26	
Identifier	Type	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Eff Date
XX55	COMPUTER PORTABLE		APPLE	M5555	XX55		\$ 6,500.00	12/09/2000
Steward : SUNFLOWER SYSTEMS Custodian : FRAZIER KRISTEN S 020866 User : Asset Type : AUTOMATED DATA PROCESSING EQUIPMENT Asset Condition : Expected Return Date : Initial Event : SUBJECT TO AGREEMENT on : 12/09/2000 Initial Event : Ongoing Events : User Fields : Global User Fields : IP Address:**Memory:								
XX56	COMPUTER PORTABLE		APPLE	M5555	XX56		\$ 6,500.00	12/09/2000
Steward : SUNFLOWER SYSTEMS Custodian : FRAZIER KRISTEN S 020866 User : Asset Type : AUTOMATED DATA PROCESSING EQUIPMENT Asset Condition : Expected Return Date : Initial Event : SUBJECT TO AGREEMENT on : 12/09/2000 Initial Event : Ongoing Events : User Fields : Global User Fields : IP Address:**Memory:								

Figure 3-46: Agreement Assets (Global Information) Report

AGREEMENT ACTIVITY REPORT

Use the **Agreement Activity** report to show a summary of additions and deletions, for a time period, for one or more agreements. You can search for and retrieve summary activity reports for assets in numerous ways. For example, if you are responsible for multiple agreements, you can generate a report that displays the summary activity for assets associated with respective agreements and more.

Use the **Agreement Activity** report to view assets that have been added or deleted to an agreement over a period of time.

To run a report perform the following:

- Step 1.** Select either **Agree > Agreement Reports** or **Reports > Agreement Reports**.
- Step 2.** Click the **Agreement Activity** report.
- Step 3.** Specify criteria on the Report Parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



Sunflower Applications - Production 4.0.0.0 Agreement Reports

ASAG6020 Agreement Activity

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

Activity Between: (MM/DD/YYYY) and (MM/DD/YYYY)

Reporting \$ Breakpoint:

Agreement: Identifier Type

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

Include Child Agreements

Organization By:

Sponsor:

Organization With:

Person With: Identifier Last Name First Mid Prefix Suffix

You can use '%' as a wildcard character in the Identifier, Last Name, First and Mid fields

FSC/National Stock Number:

Agr Classification(s):
 NOT ASSIGNED
 AGENCY-PECULIAR
 BUILDING - NASA
 CONSTRUCTION IN PROGRESS - NASA
 CONTRACT WORK IN PROCESS - NASA
 EQUIPMENT - NASA
 INDUSTRIAL PLANT EQUIPMENT - DOD

Asset Type Category(s):
 COMMODITY
 LAND
 PERSONAL PROPERTY
 REAL PROPERTY

Asset Type(s):
 AUTOMATED DATA PROCESSING EQUIPMENT
 BUILDINGS
 LABORATORY EQUIPMENT
 MISCELLANEOUS
 MOTOR VEHICLES
 OFFICE EQUIPMENT
 SPACE VEHICLES

Figure 3-47: Agreement Activity Report Parameters

AGREEMENT ACTIVITY REPORT OUTPUT

Use the **Agreement Activity** report output to view assets that have been added or deleted to an agreement over a period of time. The following report reveals the assets assigned to various agreements.

Sunflower Assets		Agreement Activity				Page 2 of 11	
ASAG6020						07/22/2005 16:07	
Identifier : LEASE - 1999-01-01		Parent : -					
Begin Date : 01/01/1999		Scheduled End Date : 01/01/2001		End Date :			
Organization By : SUNFLOWER SYSTEMS		Entered Into With : ACME RESOURCES					
Sponsor : HUMAN RESOURCES		Internal Contact		External Contact			
Initiated By : FRAZIER KRISTEN S 020866		Initiated By : SMITH JOHN O SM01					
Agreement Admin : FRAZIER TIMOTHY M 050167		Agreement Admin :					
Property Admin :		Property Admin :					
Agr User Fields :							
Agr Classification: NOT ASSIGNED							
Beginning 07/22/2005							
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Quantity
0156		COMPUTER PORTABLE	APPLE	DUO DOCK	0156	\$ 6,500.00	1
XX60		COMPUTER PORTABLE	APPLE	DUO DOCK	XX60	\$ 6,500.00	1
Beginning Total:						\$ 13,000.00	2
Additions							
Additions Total:						\$ 0.00	0
Deletions							
Deletions Total:						\$ 0.00	0
Ending 07/22/2005							
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Quantity
0156		COMPUTER PORTABLE	APPLE	DUO DOCK	0156	\$ 6,500.00	1
XX60		COMPUTER PORTABLE	APPLE	DUO DOCK	XX60	\$ 6,500.00	1
Ending Total:						\$ 13,000.00	2
Subtotals Agr Classification: NOT ASSIGNED							
Value:		Beginning	07/22/2005	Additions	Deletions	Ending	07/22/2005
Quantity:		\$13,000.00	2	\$0.00	\$0.00	\$13,000.00	2
Totals : LEASE - 1999-01-01							
Value:		Beginning	07/22/2005	Additions	Deletions	Ending	07/22/2005
Quantity:		\$13,000.00	2	\$0.00	\$0.00	\$13,000.00	2

Figure 3-48: Agreement Activity Report

AGREEMENT ADDITIONS AND DELETIONS

The **Agreement Additions and Deletions** report shows the details of asset additions and deletions, for a time period, for one or more agreements. Use the **Agreement Additions and Deletions** report to view assets that have been added or deleted to an agreement over a period of time.

To run a report perform the following:

- Step 1.** Select either **Agree > Agreement Reports** or **Reports > Agreement Reports**.
- Step 2.** Click the **Agreement Additions and Deletions** report.
- Step 3.** Specify criteria on the Report Parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

Sunflower Applications - Production 4.0.0.0 Agreement Reports
ASAG6030 Agreement Additions and Deletions

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

Activity Between: 07/22/2005 (MM/DD/YYYY) and 07/22/2005 (MM/DD/YYYY)
 Reporting \$ Breakpoint: \$00

Agreement: Identifier: _____ Type: _____
You can use '*' as a wildcard character in the Identifier field
 Include Child Agreements

Organization By: ASSET CENTER,XX
 Sponsor: _____
 Organization With: _____

Person With: Identifier: _____ Last Name: _____ First: _____ Mid: _____ Prefix: _____ Suffix: _____
You can use '*' as a wildcard character in the Identifier, Last Name, First and Mid fields

FSC/National Stock Number: _____
 All
 NOT ASSIGNED

Figure 3-49: Agreement Additions and Deletions Report Parameters

AGREEMENT ADDITIONS AND DELETIONS REPORT OUTPUT

Use the **Agreement Additions and Deletions** report output to view assets that have been added or deleted to an agreement over a period of time. The following report reveals the assets deletions with the *2000-XX-01* agreement.

Sunflower Assets		Agreement Additions and Deletions				Page 2 of 4	
ASAG6030						06/13/2005 17:33	
Agreement : LEASE - 2000-XX-01		Parent : -					
Begin Date : 06/01/2005		Scheduled End Date : 06/01/2006		End Date :			
Entered Into By : ASSET CENTER XX		Entered Into With : ACME RESOURCES					
Sponsor : HUMAN RESOURCES							
Internal Contacts:				External Contacts:			
Initiated By : ANDERSON JOE 44A409				Initiated By : DAVIS ANN			
Agreement Admin : FRAZIER KRISTEN S 020866				Agreement Admin : MILLER CARL			
Property Admin : DOE JANE 050698				Property Admin :			
Agr User Fields :							
Classification: NOT ASSIGNED							
Deletions							
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Quantity
XX60		COMPUTER PORTABLE	APPLE	DUO DOCK	XX60	(\$ 6,500.00)	(1)
						Total:	(1)
						(\$ 6,500.00)	(1)
Subtotals :							
						Additions	Deletions
Value:						\$0.00	(\$6,500.00)
Quantity:						0	(1)
Totals : LEASE - 2000-XX-01							
						Additions	Deletions
Value:						\$0.00	(\$6,500.00)
Quantity:						0	(1)

Figure 3-50: Agreement Additions and Deletions Report

AGREEMENT ASSET ACTIVITY SUMMARY BY ASSET FLAG

The **Agreement Asset Activity Summary by Flag** report shows the details of agreement asset activity grouped by asset flag.

To run a report perform the following:

- Step 1.** Select either **Agree > Agreement Reports** or **Reports > Agreement Reports**.
- Step 2.** Click the **Agreement Asset Activity Summary by Flag** report.
- Step 3.** Specify criteria on the Report Parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

 **Sunflower Applications - Production 4.0.0.0 Agreement Reports**

ASMN6140 Agreement Asset Activity Summary by Flags

How would you like to select the activity that appear on the report?

Agreement Identifier Type

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

Include only activity recorded between (MM/DD/YYYY) and (MM/DD/YYYY)

[Agreement Reports](#)

Figure 3-51: Agreement Asset Activity Summary by Flag Report Parameters

AGREEMENT ASSET ACTIVITY SUMMARY BY FLAG REPORT OUTPUT

The **Agreement Asset Activity Summary by Flag** report output displays the count and dollar amounts of agreement assets grouped by asset flag types.

Sunflower Assets		ASMN6140		Agreement Asset Activity Summary by Flags		Page 2 of 3		10/02/2005 21:41	
Opened Assets				Closed Assets					
	<u>Count</u>		<u>Value</u>		<u>Count</u>		<u>Value</u>		
Sensitive	1	\$	4,300,000.00	Sensitive	0	\$	0.00		
High Risk	0	\$	0.00	High Risk	0	\$	0.00		
Obsolete Asset	2	\$	200,000.00	Obsolete Asset	1	\$	100,000.00		
Heritage Asset	0	\$	0.00	Heritage Asset	0	\$	0.00		
Plant Clearance	0	\$	0.00	Plant Clearance	0	\$	0.00		
OTHER	60	\$	255,649,799.00	OTHER	4	\$	200,000.00		
Total	63	\$	260,149,799.00	Total	5	\$	300,000.00		
				Ending					
					<u>Count</u>		<u>Value</u>		
				Sensitive	1	\$	4,300,000.00		
				High Risk	0	\$	0.00		
				Obsolete Asset	1	\$	100,000.00		
				Heritage Asset	0	\$	0.00		
				Plant Clearance	0	\$	0.00		
				OTHER	56	\$	255,449,799.00		
				Total	58	\$	259,849,799.00		

Figure 3-52: Agreement Asset Activity Summary by Flag Report

AGREEMENT ASSET ACTIVITY SUMMARY BY ASSET TYPE

The **Agreement Asset Activity Summary by Asset Type** report shows the details of agreement asset activity by asset type.

To run a report perform the following:

- Step 1.** Select either **Agree > Agreement Reports** or **Reports > Agreement Reports**.
- Step 2.** Click the **Agreement Asset Activity Summary by Asset Type** report.
- Step 3.** Specify criteria on the Report Parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

 **Sunflower Applications - Production 4.0.0.0 Agreement Reports**

ASMN6170 Agreement Asset Activity Summary By Asset Type

How would you like to select the activity that appears on the report?

Agreement Identifier Type

 LEASE

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

Include only activity recorded between (MM/DD/YYYY) and (MM/DD/YYYY)

[Agreement Reports](#)

Figure 3-53: Agreement Asset Activity Summary by Asset Type Report Parameters

AGREEMENT ASSET ACTIVITY SUMMARY BY ASSET TYPE REPORT OUTPUT

The **Agreement Asset Activity Summary by Asset Type** report output displays the count and amounts of agreement asset activity by asset type. For example, grouped by the Initial Event, Subject to Agreement.

Sunflower Assets ASMNG170		Agreement Asset Activity Summary By Asset Type						Page 3 of 6 10/02/2005 21:58	
Initial Events									
Initial : SUBJECT TO AGREEMENT									
Event	Count	Below \$.00	Value	Count	At or Above \$.00	Value	Count	Total	Value
AUTOMATED DATA PROCESSING EQUIPMENT	0	\$	0.00	26	\$	144,600.00	26	\$	144,600.00
BUILDINGS	0	\$	0.00	1	\$	5,000,000.00	1	\$	5,000,000.00
MISCELLANEOUS	0	\$	0.00	20	\$	139,344,999.00	20	\$	139,344,999.00
MOTOR VEHICLES	0	\$	0.00	6	\$	114,300,200.00	6	\$	114,300,200.00
SPACE VEHICLES	0	\$	0.00	10	\$	1,360,000.00	10	\$	1,360,000.00
Total	0	\$	0.00	63	\$	260,149,799.00	63	\$	260,149,799.00
Initial Events Total	0	\$	0.00	63	\$	260,149,799.00	63	\$	260,149,799.00

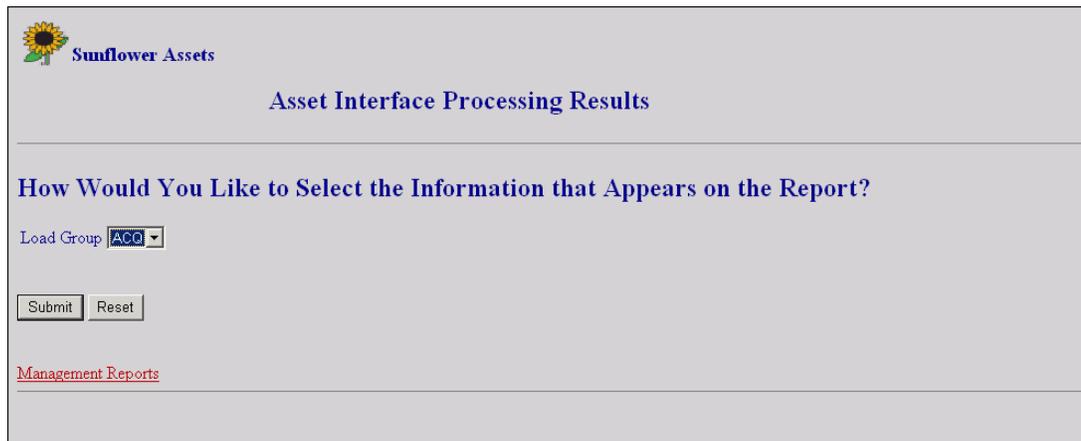
Figure 3-54: Agreement Asset Activity Summary by Asset Type Report

AGREEMENT ASSET INTERFACE PROCESSING RESULTS

The **Agreement Asset Interface Processing Results** report shows the results of processing the contents of AS_LOAD_AGREEMENT_ASSETS interface table.

To run a report perform the following:

- Step 1.** Select either **Agree > Agreement Reports** or **Reports > Agreement Reports**.
- Step 2.** Click the **Agreement Asset Interface Processing Results** report.
- Step 3.** Specify criteria on the Report Parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



 Sunflower Assets

Asset Interface Processing Results

How Would You Like to Select the Information that Appears on the Report?

Load Group:

[Management Reports](#)

Figure 3-55: Agreement Asset Interface Processing Results Report Parameters

AGREEMENT ASSET INTERFACE PROCESSING RESULTS REPORT OUTPUT

The **Agreement Asset Interface Processing Results** report output displays the results of processing the contents of AS_LOAD_AGREEMENT_ASSETS interface table.

Sunflower Enterprise ASMN6090		Asset Interface Processing Results		Page 2 of 6 10/07/2005 13:04
Record Group	Date	Result		
Success Total		0		
Record Group	Date	Result		
0127	07/29/1998 16:32:54	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0128	07/29/1998 16:32:55	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D01'		
0129	07/29/1998 16:32:55	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0227	07/29/1998 16:32:55	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0228	07/29/1998 16:32:55	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D02'		
0229	07/29/1998 16:32:55	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0327	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0328	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D03'		
0329	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0427	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0428	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D04'		
0429	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0527	07/29/1998 16:32:56	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		
0528	07/29/1998 16:32:57	SA-01090: Unable to determine value for AS_ASSET.CATALOG_ID from value 'DELL/D05'		
0529	07/29/1998 16:32:57	SA-01090: Unable to determine value for AS_ASSET.ORGANIZATION_ID_STEWARD from value 'ASSET CENTER'		

Figure 3-56: Agreement Asset Interface Processing Results Report

AGREEMENT ASSET ONGOING EVENTS

The **Agreement Asset Ongoing Events** report shows the details of ongoing events, e.g. maintenance, repairs and mileage captured, for agreement assets for a time period. Use the **Agreement Asset Ongoing Events** report to view assets ongoing events over a period of time.

To run a report perform the following:

- Step 1.** Select either **Agree > Agreement Reports** or **Reports > Agreement Reports**.
- Step 2.** Click the **Agreement Asset Ongoing Events** report.
- Step 3.** Specify criteria on the Report Parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

Sunflower Applications - Production 4.0.0.0 Agreement Reports

ASMN6076 Agreement Asset Ongoing Events

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

Identifier

Ongoing Event Type

Include Only Ongoing Events Created Between (MM/DD/YYYY) and (MM/DD/YYYY)

Asset Ongoing Event

Asset User Fields

Figure 3-57: Agreement Asset Ongoing Events Report Parameters

AGREEMENT ASSET ONGOING EVENTS REPORT OUTPUT

The **Agreement Asset Ongoing Events** report output shows detailed information for ongoing events, (e.g. maintenance, repairs or mileage captured) of agreement assets over a period of time.

Sunflower Assets		Agreement Asset Ongoing Event				Page 2 of 3	
ASMN6076						10/02/2005 22:25	
Ongoing Event : SENT TO MAINTENANCE							
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Eff Date
NASA-456G		STAR 4G MOTOR	ALLIANT TECHSYSTEMS	STAR 4G MOTOR		\$ 109,999.99	09/16/2005
Initial Event : SUBJECT TO AGREEMENT							
On : 09/09/2005 Document :							
User Fields :							
Steward : SUNFLOWER SYSTEMS				Location : ARLINGTON			
Custodian : ANDERSON JOE 44A409							
User : DAVIS ANN							
Ongoing Event Date : 09/21/2005							
User Fields: Ticket Number:MM123GHRT							
Comment :							
					Total :	1	
					Report Total :	1	\$ 109,999.99

Figure 3-58: Agreement Asset Ongoing Events Report

AGREEMENT ASSET SUMMARY BY ASSET FLAG

The **Agreement Asset Summary by Asset Flag** report summarizes agreement asset value and count by asset flag.

To run a report perform the following:

- Step 1.** Select either **Agree > Agreement Reports** or **Reports > Agreement Reports**.
- Step 2.** Click the **Agreement Asset Summary by Flag** report.
- Step 3.** Specify criteria on the Report Parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

 Sunflower Applications - Production 4.0.0.0 Agreement Reports

ASMN6130 Agreement Asset Summary by Flags

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

Summary Type

Asset Event Type

If Summary Type is Active:
Include Only Assets Active as of

If Summary Type is Initial Event or Final Event:
Include only assets with an event recorded between (MM/DD/YYYY) and (MM/DD/YYYY)

How Would You Like the Assets to be Grouped?

Figure 3-59: Agreement Asset Summary by Flag Report Parameters

AGREEMENT ASSET SUMMARY BY FLAG REPORT OUTPUT

The **Agreement Asset Summary by Flag** report output summarizes the total agreement asset value and count by asset flag.

Sunflower Assets		Agreement Asset Summary by Flags		Page 2 of 3
ASMNG130				10/02/2005 22:37
	Count		Value	
Sensitive	1	\$	4,300,000.00	
High Risk	0	\$	0.00	
Obsolete Asset	1	\$	100,000.00	
Heritage Asset	0	\$	0.00	
Plant Clearance	0	\$	0.00	
OTHER	56	\$	255,449,799.00	
Total	58	\$	259,949,799.00	
All	Count		Value	
Sensitive	1	\$	4,300,000.00	
High Risk	0	\$	0.00	
Obsolete Asset	1	\$	100,000.00	
Heritage Asset	0	\$	0.00	
Plant Clearance	0	\$	0.00	
OTHER	56	\$	255,449,799.00	
Report Total	58	\$	259,949,799.00	
			\$ 259,949,799.00	

Figure 3-60: Agreement Asset Summary by Flag Report

AGREEMENT ASSET SUMMARY BY ASSET TYPE

The **Agreement Asset Summary by Asset Type** report summarizes agreement asset value and count by asset type.

To run a report perform the following:

- Step 1.** Select either **Agree > Agreement Reports** or **Reports > Agreement Reports**.
- Step 2.** Click the **Agreement Asset Summary by Asset Type** report.
- Step 3.** Specify criteria on the Report Parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

 Sunflower Applications - Production 4.0.0.0 Agreement Reports

ASMN6160 Agreement Asset Summary by Asset Type

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

Summary Type

Asset Event Type

If Summary Type is Active:
Include only assets active as of

If Summary Type is Initial Event or Final Event
Include only assets with an event recorded between (MM/DD/YYYY) and (MM/DD/YYYY)

How would you like the assets to be grouped?

[Agreement Reports](#)

Figure 3-61: Agreement Asset Summary by Asset Type Report Parameters

AGREEMENT ASSET SUMMARY BY ASSET TYPE REPORT OUTPUT

The **Agreement Asset Summary by Asset Type** report output summarizes the total agreement asset value and count by asset type.

Sunflower Assets		Agreement Asset Summary By Asset Type						Page 2 of 3	
ASMN6160								10/02/2005 22:48	
	Count	Below \$.00	Value	Count	At or Above \$.00	Value	Count	Total	Value
AUTOMATED DATA PROCESSING EQUIPMENT	0	\$	0.00	26	\$	144,600.00	26	\$	144,600.00
BUILDINGS	0	\$	0.00	1	\$	5,000,000.00	1	\$	5,000,000.00
MISCELLANEOUS	0	\$	0.00	20	\$	139,344,999.00	20	\$	139,344,999.00
MOTOR VEHICLES	0	\$	0.00	6	\$	114,300,200.00	6	\$	114,300,200.00
SPACE VEHICLES	0	\$	0.00	5	\$	1,060,000.00	5	\$	1,060,000.00
Total	0	\$	0.00	58	\$	259,849,799.00	58	\$	259,849,799.00
Report Total	0	\$	0.00	58	\$	259,849,799.00	58	\$	259,849,799.00

Figure 3-62: Agreement Asset Summary by Asset Type Report

AGREEMENT ASSET UTILIZATION

The **Agreement Asset Utilization** report displays the percentage utilization of agreement assets over a time period.

To run a report perform the following:

- Step 1.** Select either **Agree > Agreement Reports** or **Reports > Agreement Reports**.
- Step 2.** Click the **Agreement Asset Utilization** report.
- Step 3.** Specify criteria on the Report Parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



Sunflower Applications - Production 4.0.0.0 Agreement Reports

ASMN6150 Agreement Asset Utilization

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

Manager
 Owner
 Steward
 Include the Steward child Organizations

Official Name
 Manufacturer
 Model

Custodian

Identifier	Last Name	First	Mid	Prefix	Suffix
<input type="text"/>					

You can use '%' as a wildcard character in the Identifier, Last Name, First and Mid fields

User

Identifier	Last Name	First	Mid	Prefix	Suffix
<input type="text"/>					

You can use '%' as a wildcard character in the Identifier, Last Name, First and Mid fields

Location

Site/Off-Site Type	Structure Level 1 Type	Structure Level 1	Structure Level 2 Type	Structure Level 2
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Consider Only Activity Between (MM/DD/YYYY) and (MM/DD/YYYY)
 Include Only Asset With Utilization % Between and
 Include Utilization Detail
 Absolute or Relative Duration

How Would You Like the Assets to be Grouped?

How Would You Like the Assets to be Sorted?

1 2 3

[Agreement Reports](#)

Figure 3-63: Agreement Asset Utilization Report Parameters

AGREEMENT ASSET UTILIZATION REPORT OUTPUT

Review the **Agreement Asset Utilization** report output for the percentage utilization of agreement assets over a time period.

Sunflower Assets ASMN6150		Agreement Asset Utilization					Page 2 of 11 10/02/2005 23:02	
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Util %	
0155		COMPUTER PORTABLE	APPLE	M5555	0155	\$ 6,500.00	32.09	
	Steward : SUNFLOWER SYSTEMS				Location : LIVERMORE			
	Custodian : FRAZIER KRISTEN S	020966			BUILDING : 121 ROOM : 101			
	User :							
0156		COMPUTER PORTABLE	APPLE	M5555	0156	\$ 6,500.00	32.09	
	Steward : SUNFLOWER SYSTEMS				Location : LIVERMORE			
	Custodian : FRAZIER KRISTEN S	020966			BUILDING : 121 ROOM : 101			
	User :							
0255		COMPUTER PORTABLE	APPLE	M5555	0255	\$ 6,500.00	32.09	
	Steward : SUNFLOWER SYSTEMS				Location : LIVERMORE			
	Custodian : FRAZIER KRISTEN S	020966			BUILDING : 121 ROOM : 101			
	User :							
0256		COMPUTER PORTABLE	APPLE	M5555	0256	\$ 6,500.00	32.09	
	Steward : SUNFLOWER SYSTEMS				Location : LIVERMORE			
	Custodian : FRAZIER KRISTEN S	020966			BUILDING : 121 ROOM : 101			
	User :							
0355		COMPUTER PORTABLE	APPLE	M5555	0355	\$ 6,500.00	32.09	
	Steward : SUNFLOWER SYSTEMS				Location : LIVERMORE			
	Custodian : FRAZIER KRISTEN S	020966			BUILDING : 121 ROOM : 101			
	User :							
0356		COMPUTER PORTABLE	APPLE	M5555	0356	\$ 6,500.00	32.09	
	Steward : SUNFLOWER SYSTEMS				Location : LIVERMORE			
	Custodian : FRAZIER KRISTEN S	020966			BUILDING : 121 ROOM : 101			
	User :							

Figure 3-64: Agreement Asset Utilization Report

ASSET SEARCH REPORT

The **Asset Search** report searches the asset repository for assets matching a description, manufacturer or model; used for asset review.

To run a report perform the following:

- Step 1.** Select either **Agree > Agreement Reports** or **Reports > Agreement Reports**.
- Step 2.** Click the **Asset Search** report.
- Step 3.** Specify criteria on the Report Parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.

ASSET SEARCH REPORT OUTPUT

Review the **Asset Search** report output for the search results of the asset repository for assets matching a description, manufacturer or model; used for asset review.

Sunflower Assets		Asset Search				Page 2 of 4	
ASMN6120						10/02/2005 23:41	
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
AGR MBT-1037	SH	X	GENERAL DYNAMICS (LAND SYSTEMS DIVISION)	M1A1 ABRAMS BATTLE TANK		\$ 4,300,000.00	08/29/2005
AGR BLACK-HAT-RANCH		TRAILER FOUNDATION	ACME PREFAB	T558FHY		\$ 5,000,000.00	08/29/2005
AGR ORP-456		X	GENERAL DYNAMICS (LAND SYSTEMS DIVISION)	M1A1 ABRAMS BATTLE TANK		\$ 20,000,000.00	08/30/2005
AGR OPE-456		X	GENERAL DYNAMICS (LAND SYSTEMS DIVISION)	M1A1 ABRAMS BATTLE TANK		\$ 25,000,000.00	08/30/2005
AGR IPE-456		X	GENERAL DYNAMICS (LAND SYSTEMS DIVISION)	M1A1 ABRAMS BATTLE TANK		\$ 30,000,000.00	08/30/2005
AGR STE-456		X	GENERAL DYNAMICS (LAND SYSTEMS DIVISION)	M1A1 ABRAMS BATTLE TANK		\$ 35,000,000.00	08/30/2005
AGR MILSPEC-456		NON RECORDED	NON RECORDED	NON RECORDED		\$ 40,000,000.00	08/30/2005
		Quantity : 1000	UCM : TON	Long Description : MATERIAL FOR REACTIVE ARMOR			
AGR MILSPEC888		NON RECORDED	NON RECORDED	NON RECORDED		\$ 50,000,000.00	08/30/2005
		Quantity : 2000	UCM : G	Long Description : NON RECORDED			
AGR TOOL-456		NON RECORDED	NON RECORDED	NON RECORDED		\$ 45,000,000.00	08/30/2005
AGR SPECIALTOOL-456		NON RECORDED	NON RECORDED	NON RECORDED		\$ 500,000.00	09/01/2005
AGR NASA-456B		NON RECORDED	NON RECORDED	NON RECORDED		\$ 100,000.00	09/09/2005
AGR NASA-456B							
AGR NASA-456F		NON RECORDED	NON RECORDED	NON RECORDED		\$ 2,000,000.00	09/09/2005
AGR NASA-456G		STAR 4G MOTOR	ALLIANT TECHSYSTEMS	STAR 4G MOTOR		\$ 109,999.99	09/09/2005

Figure 3-66: Asset Search Report

PURCHASE ORDER AGING REPORT

The **Purchase Order Aging** report shows the detailed information of outstanding purchases orders requiring receipt and tagging of property.

To run a report perform the following:

- Step 1.** Select either **Agree > Agreement Reports** or **Reports > Agreement Reports**.
- Step 2.** Click the **Purchase Order Aging** report.
- Step 3.** Specify criteria on the Report Parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



ASPO6010 Purchase Order Aging Report

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

PO Identifier:

Item #:

Description:

Display Aging (in days)

Start From (default 0):

Interval (default 30):

Display Values: For Quantity Allocated. Include quantity allocated from Interface Table

Include Which of the Following?

- PO Header Attributes
- PO Item Attributes
- Only Incomplete POs
- Only those PO Items whose quantity received is more than the quantity allocated to assets

How Would You Like the Purchase Orders to be Grouped?

How Would You Like the Purchase Orders to be Sorted?

1: 2: 3:

How Would You Like the Purchase Order Items to be Sorted?

PO Header Attributes

Label	Operator	Value
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

[Management Reports](#)

Figure 3-67: Purchase Order Aging Report Parameters

PURCHASE ORDER AGING REPORT OUTPUT

Review the **Purchase Order Aging** report output for the detailed information of outstanding purchases orders requiring receipt and tagging of property.

Sunflower Enterprise		Purchase Order Aging Report					Page 2 of 14
ASPO6010							10/07/2005 13:26
PO Identifier : 1005 PO SUPPLIER: AMERSHAM PHARMACIA__ORGANIZATION: 2222__							
Item #	Description	Age	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Days
1	SEQUENCER	680					3
Item # Total :		1	3				3
PO Identifier : 1070 PO SUPPLIER: TEST SUPPLIER__ORGANIZATION: ABMM__							
Item #	Description	Age	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Days
1	SAMPLE ITEM TO BE ROUTED FOR APPROVAL	680					2
Item # Total :		1	2				2
PO Identifier : 1071 PO SUPPLIER: TEST SUPPLIER__ORGANIZATION: ABMM__							
Item #	Description	Age	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Days
1	SAMPLE ITEM TO BE ROUTED FOR APPROVAL	680					1
Item # Total :		1	1				1
PO Identifier : 10810 PO SUPPLIER: FISHER SCIENTIFIC__ORGANIZATION: BAOQ__							
Item #	Description	Age	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Days
1	#981237, MRGATTRACT DNA BLOOD MINI 48 KIT	680					2
2	#995682 FILTERTIPS, 1000UL, M48	680					12

Figure 3-68: Purchase Order Aging Report

EXCESS ASSET REPORT

Use the **Excess Asset** report to check for available excess assets. To run a report perform the following:

- Step 1.** Select either **Excess > Excess Reports** or **Reports > Excess Reports**.
- Step 2.** Click the **Excess Asset** report.
- Step 3.** Specify criteria on the Report Parameters page.
- Step 4.** Click the **Submit** button.
- Step 5.** Select an output option (e.g. HTML, Acrobat etc.)
- Step 6.** Click the **eXecute** button to generate the report.



Sunflower Applications - Production 4.0.0.0 Excess Reports

ASEX6010 Excess Assets

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

Manager	<input type="text"/>
Owner	<input type="text"/>
Steward	<input type="text"/>
	<input type="checkbox"/> Include the Steward's child Organizations
Official Name	<input type="text"/>
Manufacturer	<input type="text"/>
Model	<input type="text"/>
Asset Type	OFFICE EQUIPMENT
FSC/National Stock Number	<input type="text"/>
Review Category	<input type="text"/>
Review Type	<input type="text"/>
Lot Master Type	<input type="text"/>
Lot Master Identifier	<input type="text"/>
Lot Identifier	<input type="text"/>

Figure 3-69: Excess Assets Report Parameters

EXCESS ASSETS REPORT OUTPUT

Review the **Excess Assets** report output to determine if there are any excess asset available for your organization. The following report reveals several excess asset available for transfer to your organization.

Sunflower Enterprise ASEX6010		Excess Assets				Page 2 of 4 07/19/2005 11:04	
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
E0101		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0102		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0201		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0202		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0301		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0302		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0401		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0402		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0501		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0502		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990
E0601		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 1,200.00	01/01/1990

Figure 3-70: Excess Assets Report

After determining the available excess assets for transfer to your organization, you can navigate back to the **Create Excess Asset Reservation** screen and submit your request for the selected excess asset.



INACTIVE ASSETS

Inactive asset management is the field of asset management overseeing assets that are in storage. The Inactive Assets chapter defines the process of converting an asset into an inactive asset, discusses the activities of users who manage the inactive assets portion of the asset lifecycle and addresses the steps required to re-utilize and redeploy inactive assets.

KEY CONCEPTS

This chapter discusses the following concepts and activities:

- “About Inactive Assets”
- “Inactive Roles”
- “Inactive Receiving Requests”
- “Create Inactive Assets”
- “Manage Inactive Assets”
- “Re-Utilize Inactive Assets”
- “Excess Inactive Assets”
- “Retire Inactive Assets”
- “Inactive Reports”

ABOUT INACTIVE ASSETS

The Inactive module enables you to create and manage assets that are currently not in-use or that you want to designate for storage. This chapter starts by looking at:

- Inactive receipt requests
- Inactive asset reports
- Inactive assets creation from inactive receipt requests.

Additionally, this chapter demonstrates how to manage inactive assets throughout the storage period and the process for returning inactive assets to service or disposal of inactive assets from storage.

INACTIVE MODULE WORKFLOW

The Inactive module handles the following primary functions: creation, management, and disposal of assets. The workflow diagram below depicts this process based on the menu items found within the inactive module to help you obtain your desired objectives.

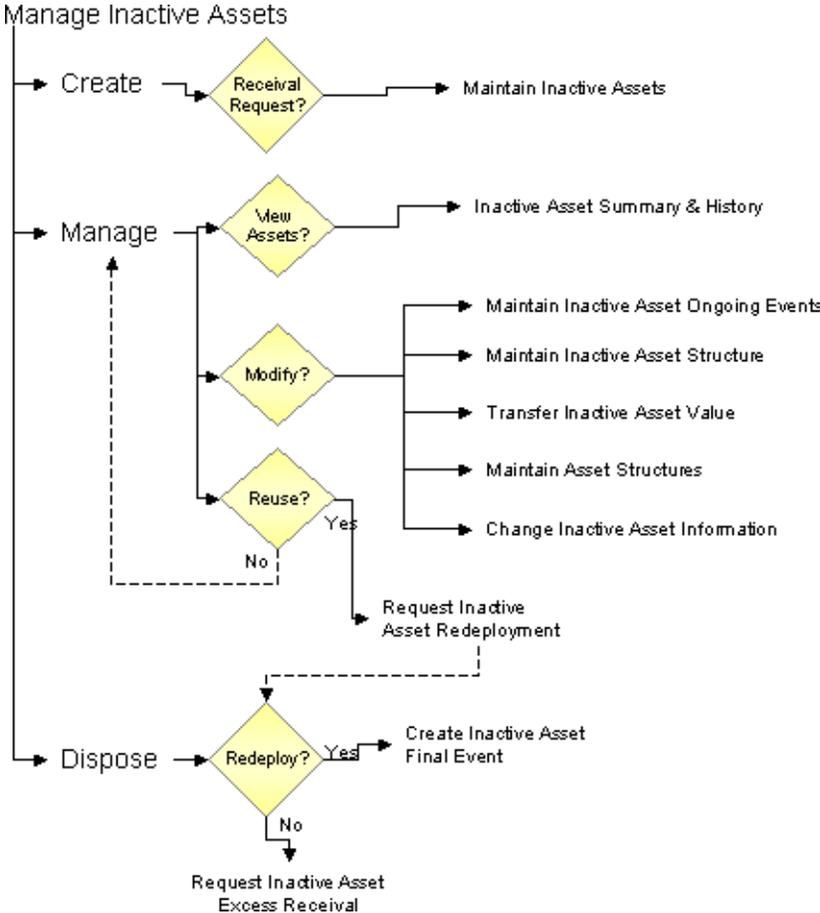


Figure 4-1: Sunflower Enterprise Inactive Module Workflow

INACTIVE ROLES

Sunflower approaches asset management with the belief that you can manage, monitor, control, and account for an asset throughout its distinct lifecycle. Sunflower does not impose the way in which you have to manage your assets but provides guidelines, structures, processes, and tools to help you manage them effectively. The users that you assign to manage the various aspects of an asset at each stage of the lifecycle will depend upon your organizational structure and processes.

A Sunflower user is any individual to whom you assign one or more roles. The assignment of Sunflower roles enables users to perform job duties that are enabled by the specified role. Roles provide access to screens and define the extent to which an individual can perform functions such as adding, updating, and retiring asset records. The user in question may be an employee or a contractor working on the behalf of your organization who has a job function that requires either active (e.g. create, update or delete functions) or passive (e.g. general inquiry, searching and reporting) use of menu items in the Inactive module.

The Inactive module roles include Inactive Managers and Inactive Clerks. Depending upon your organizational structure, you may find that in a small, or centralized organization, you assign most of the users as managers responsible for performing all or many of the tasks related to property storage management with a small number of users assigned as Inactive Clerks to carry out the daily business process. Refer to “Inactive Menu Access” on page 321 to view the menu items that are accessible to each inactive role.

For more information about Sunflower application roles, see the Roles chapter in the Sunflower Enterprise User Guide.

INACTIVE MENU ACCESS

When assigning roles, it is important to map out the functional responsibilities of your users and decide based on the tasks that each user must perform how to assign the appropriate application role. The table below lists menu access within the Inactive module based upon the related Inactive module roles.

MENU ITEM	ROLE	
	INACTIVE MANAGER	INACTIVE CLERK
Maintain Inactive Assets	Yes	Yes
Inactive Asset Summary and History	Yes	Yes
Asset Search	Yes	Yes
Maintain Catalog Entries*	--	--
Change Inactive Asset Information	Yes	Yes
Transfer Inactive Asset Value	Yes	Yes
Maintain Inactive Asset Ongoing Events	Yes	Yes
Create Inactive Asset Final Events	Yes	Yes
Edit Inactive Asset Interface Records	Yes	Yes
Process Inactive Asset Interface Records	Yes	Yes
Process Inactive Asset PO Interface Records	Yes	Yes
Edit Asset Value Component Interface Records	Yes	Yes
Request Inactive Receival Request	Yes	Yes
Withdraw Inactive Receival Request	Yes	Yes
Deny Inactive Receival Request	Yes	Yes
Request Inactive Asset Redeployment	Yes	Yes
Withdraw Inactive Redeployment Requests	Yes	Yes
Maintain Asset Structures	Yes	Yes
Inactive Reports	Yes	Yes

*Inactive Clerks and Managers have access to the **Maintain Catalog Entries** screen if you assign them the AS_CATALOGER role.

INACTIVE RECEIVAL REQUESTS

From Sunflower's perspective, any asset may be stored as inactive by first creating a request to a person/group (e.g. inactive department, warehouse, etc.) to turn an active asset into an inactive asset. In other words, you are transferring the responsibility of the asset to another group.

Creation of an inactive asset is a two-part process performed by an individual in the steward organization (e.g. Inventory Clerk or ACR) and an Inactive Clerk. For example, if the ACR is performing the activity, the first step in the process is to create an inactive receival request. After creating the request, an Inactive Manager can create the inactive asset from the inactive receival request. An asset cannot become an inactive asset until the inactive receival request is accepted, however; if this function is performed by an Inactive Manager, then an active asset may be converted to an inactive asset directly and by-pass the request process.

In addition, there are times when you may want to store an asset for later use. The asset may be a new asset that has been purchased and designated for a project that is not yet ready to utilize the asset. This asset may require special storage that can be better handled by your inactive asset organization such as a warehouse management facility. Alternatively, an asset could be used and in good condition but your organization has no current use for the asset. By sending the used asset to an inactive storage facility, you give your entire enterprise the opportunity to search for and request the transfer of non-utilized assets to their organization and put to use for another project that supports the goals of your entire enterprise. In order to assure that the assets have proper storage and can be made available when needed, you can request that the assets be placed in an inactive mode and stored under the proper conditions.

Sunflower provides the Inactive module to handle inactive asset requests for Agreement Assets, Inventory Assets, Financial Assets and Excess Assets. This section covers inactive receival requests. Specifically, how to:

- "Create Inactive Receival Requests" on page 323
- "Withdraw Inactive Receival Requests" on page 325
- "Accept Inactive Receival Requests" on page 326
- "Deny Inactive Receival Requests" on page 329
-

CREATE INACTIVE RECEIVAL REQUESTS

A change in accountability is a two-part process that is only complete when the requested party accepts the change/transfer request. The transfer of assets is a transfer of responsibility that takes place through a handshake process known as a request and acceptance of an asset. If a request for transfer is made, the requested steward can either accept or deny the transfer of the assets in question.

Scenario: The following graphic illustrates how to create an inactive asset by using an inactive receival request. Later on in this chapter, you will learn how to accept an inactive receival request to create an inactive asset. Inventory Asset, XX04, will not be needed by your organization for at least the next 6 months. As a result you have decided to store it in a warehouse. Any charges required to collect and ship to the warehouse should be billed to account A11201. The asset should be kept dry and may not be used by other interested individuals.

NAVIGATION

- Click Inactive
- Click Request Inactive Receival
- Click Request Inventory Asset Inactive Receival

Figure 4-2: Creating an Inactive Receival Request

Step 1. Navigate to the **Request Inventory Asset Inactive Receival** screen.

Step 2. Enter the inactive request pickup and deliver-to locations.

- You have the option of making the inventory asset inactive without moving the asset to a storage facility by selecting the **Make inactive in-place?** checkbox. This checkbox also overrides the **Pick-up Location** and **Deliver-to Location** fields.
- In some cases, it may be more practical for you to store the inactive asset in a designated area that your organization can control according to the asset's requirements. Use the **Make inactive in-place** option to accommodate this type of business practice.

Step 3. Enter the asset identifier in the **Identifier** field for the item you are requesting.

- In this case, the asset identifier is *XX04*. The **Manufacturer**, **Model**, and **Official Name** fields auto-populate.

NOTE: The **Request No** (Number) is auto-generated upon saving. This number is used for tracking and reporting, and if necessary to withdraw the request.

Step 4. Use the **Inactive Type** field to select the type of storage required for the asset.

In this example, it is the default value, *CONTROLLED STORAGE*. You can specify detailed storage instructions with the **Unique Requirements** text box below.

Step 5. Specify whether the asset is available for loan (*Y* for Yes or *N* for No) to others during its inactive period.

Step 6. Enter the duration of the asset's inactive period in the **Duration (yrs)** field. The length of the inactive period is designated in years (e.g. 0.5 = 1/2 year).

Step 7. Enter the account to charge storage and related costs for inactivating the asset in the **Recharge Identifier** field.

Step 8. Specify any special considerations for the handling and storage of the asset (e.g. hazard, special storage needs, etc.) in the **Unique Rqmts** text box.

Step 9. Specify any general comments (e.g. pick up times, etc.) in the **Comment** text box.

Step 10. Click the **Save** icon to save your request.

Notice the system generated request number. In this case, it is *1103*. This number will be used to complete the inventory asset inactive receival request later.

WITHDRAW INACTIVE RECEIVAL REQUESTS

Use the **Withdraw Inactive Receival Request** screen to withdraw a prior request to inactivate an asset. You will need the **Request No** (request number) that you obtain upon saving your **Inventory Asset Inactive Receival** request in order to perform this action.

Scenario: The following graphic illustrates how to withdraw an Inactive Receival request.

NAVIGATION

- Click **Inactive**
- Click **Withdraw Inactive Receival**

Request No	Identifier	Manufacturer	Model	Official Name
1103	INV XX04	GATEWAY	SOLO 9100	COMPUTER PORTABLE

Inactive Type: CONTROLLED STORAGE

Available to others?: N Duration (yrs): Recharge Identifier: A11201

Pick-up Location: LIVERMORE__BUILDING__G_ROOM_200

Deliver-to Location: LIVERMORE__BUILDING__INACTIVE__ROOM__RCV

User: NINE ADM ADM09

Unique Requirements: KEEP DRY AT ALL TIMES

Comment: May be loaned out during the inactive period.

Message:

Figure 4-3: Withdrawing an Inactive Receival Request

Step 1. Navigate to the **Withdraw Inactive Receival Request** screen.

Step 2. Enter the inactive request number that you generated when you made the original request to inactivate the asset in the **Request No** field.

In this example, it is request number **1103**. Click the Tab key to bring up the asset information.

Step 3. Click the **Save** icon to withdraw your inactive receival request.

ACCEPT INACTIVE RECEIVAL REQUESTS

Use the **Maintain Inactive Assets** screen to create inactive assets based upon the inactive asset receipt requests. This is the second part of the two-part process for creating an inactive asset from another interest asset. The following example illustrates how to create an inactive asset based on an inactive receipt request. Notice that this screen is similar to the **Maintain Inventory Assets** screen. For more information about the **Maintain Inactive Assets** screen, see “Maintain Inactive Assets Field Terms” on page 341. The distinction is that you are creating a new inactive asset from an existing inventory asset. In order to create an inactive asset, you need the following information:

- New identifier for the inactive asset
- Request # (number)
- Existing interest asset type and identifier

You will find that both the **Asset Request Number** and the interest asset identifier can be found on the **Excess/Inactive Receipt Form** report. Use either pieces of information from the report to retrieve your pending inactive assets. For more information about the **Excess/Inactive Receipt Form** report, see “Excess/Inactive Receipt Form” on page 333.

Use the **Asset Request Number** that you generated from the inactive receipt request, (*1103*), to create an inactive asset.

- NAVIGATION**
- Click **Inactive**
 - Click **Maintain Inactive Assets**

Figure 4-4: Accepting Inactive Receipt Requests

Step 1. Navigate to the **Maintain Inactive Assets** screen.

Step 2. Enter a new inactive asset identifier in the **Identifier** field for the new inactive asset.

In this case, the asset identifier is *XX1240*. (This new identifier can be the same identifier as that of the existing asset identifier). The new inactive asset identifier is based upon your business processes and procedures.

Step 3. Specify the **Existing Interest Asset Type** as *ASR*. (Asset Request)

Step 4. Enter the **Asset Request Number**.

The *ASR* number was created during the receival request process. Click the Tab key to display the asset's information. Alternatively, users that are assigned the Inactive Manager role can create inactive assets using this screen without using the request process by specifying the existing interest asset type (e.g. inventory, agreement, etc.) and their respective identifier.

Step 5. Enter the appropriate information in the following fields to add the inactive interest asset-specific information:

- **Inactive Type** -- indicates what type of inactive status to assign to the asset.
- **Available to others?** -- indicates if the asset can be used by others while in its inactive status.
- **Length/Width/Height** -- indicates the asset's dimensions for storage purposes.
- **Recharge Identifier** -- indicates the identifier assigned to the recharge general ledger account.
- **Unique Requirements** -- indicates any unique storage requirements for the asset.

Step 6. Update the new inactive asset's information, as needed. (e.g. **Asset Condition** as *USED - GOOD*. **Location** updates etc.)

Step 7. Click the **Save** icon to save your inactive asset record.

NOTE: If you do not enter a value in a required field, Sunflower prompts you to do so.

DENY INACTIVE RECEIVAL REQUESTS

In addition to accepting receival requests, you can deny receival requests. Use the **Excess/Inactive Receival Form** report to determine if there are any outstanding requests for excess or inactive asset transfers to your organization. For more information about the **Excess/Inactive Receival Form** report, see “Excess/Inactive Receival Form” on page 333.

Scenario: The following graphic illustrates how to use the Deny Inactive Receival Request screen to deny the inactive receival request number,1082, to store a desk. Your property storage organization does not store office equipment.

NAVIGATION

- Click **Inactive**
- Click **Deny Inactive Receival Request**

The screenshot shows a web application window titled "Deny Inactive Receival Request - asmn2120". The main content area is titled "Requests" and contains a table with the following data:

Ok Request No	Identifier	Manufacturer	Model	Official Name
<input type="checkbox"/> 1082		STEELCASE	DESK 6 FT	DESK 6 FT

Below the table, there are several input fields:

- Inactive Type: CONTROLLED STORAGE
- Available to others?: N
- Duration (yrs):
- Recharge Identifier:
- Pick-up Location: LIVERMORE__BUILDING__G__ROOM__222
- Deliver-to Location: LIVERMORE__BUILDING__INACTIVE__ROOM__RCV
- User: OWNER REPOSITORY
- Unique Requirements:
- Comment:
- Message:

Figure 4-5: Denying Inactive Receival Requests

- Step 1.** Navigate to the **Deny Inactive Receival Request** screen.
- Step 2.** Enter the asset request number in the **Request No** field.
- Step 3.** Click the **Save** icon to deny the inactive receival request.

ASSETS WITH PENDING EXCESS/INACTIVE REQUESTS REPORT

The **Assets with Pending Excess/Inactive Requests** report enables you to review pending inactive and excess asset receipt requests that are awaiting review and approval.

Use the **Assets with Pending Excess/Inactive Requests** report to check for pending requests. To run a report perform the following:

- Step 1.** Select either **Inactive > Inactive Reports** or **Reports > Inactive Reports**.
- Step 2.** Click the **Assets with Pending Excess/Inactive Requests** report.

NAVIGATION

- Click **Inactive**
- Click **Inactive Reports**
- or...
- Click **Reports**
- Click **Inactive Reports**
- Click **Assets with Pending Excess/Inactive Requests**



Figure 4-6: Selecting Assets with Pending Excess/Inactive Requests Report

ASSETS WITH PENDING EXCESS/INACTIVE REQUESTS REPORT PARAMETERS

The following report parameters were used to generate the report.

Sunflower Enterprise - Production 4.5.0.0 Inactive Reports
ASMN6100 Assets with Pending Excess/Inactive Requests

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

Steward

Include the Steward's child Organizations

	Identifier	Last Name	First	Mid	Prefix	Suffix
Custodian	<input type="text"/>					
User	<input type="text"/>					
Requester	<input type="text"/>					

Interest Type to Print With Request

Include Only Assets With This Interest

Include Only Assets With a Current Interest

Asset User Fields

Request

Excess Receival Requests
 Inactive Receival Requests
 Inactive Redeployment Requests
 In-place Receival Requests

Include Only Requests Recorded Between (MM/DD/YYYY) and (MM/DD/YYYY)

Include Request Comment

Figure 4-7: Assets with Pending Excess/Inactive Requests Parameters

ASSETS WITH PENDING EXCESS/INACTIVE REQUESTS REPORT OUTPUT

Review the **Assets with Pending Excess/Inactive Requests** report output to determine if there are any outstanding excess or inactive requests for the property storage organization.

The report output includes the following:

- Report title page and summary of criteria used to create the report
- Report details (pay special attention to the Request Number and the Identifier)
- End of report page

Report Output

Request No	Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value
1063	INV 0151		COMPUTER MINI	HEWLETT-PACKARD	9000	99701	\$ 3,900.00
Asset Condition : Steward : SUNFLOWER SYSTEMS Request : INACTIVE RECEIVAL - 09/21/1999 Custodian : FRAZIER KRISTEN S 020966 Requester : OWNER REPOSITORY User : Requester Phone : Pick-up Location : LIVERMORE Deliver-to Location : LIVERMORE BUILDING : G ROOM : 200 BUILDING : INACTIVE ROOM : RCV							
1064	INV 0251		COMPUTER MINI	HEWLETT-PACKARD	9000	99702	\$ 3,900.00
Asset Condition : Steward : SUNFLOWER SYSTEMS Request : INACTIVE RECEIVAL - 09/21/1999 Custodian : FRAZIER KRISTEN S 020966 Requester : OWNER REPOSITORY User : Requester Phone : Pick-up Location : LIVERMORE Deliver-to Location : LIVERMORE BUILDING : G ROOM : 200 BUILDING : INACTIVE ROOM : RCV							
1065	INV 0351		COMPUTER MINI	HEWLETT-PACKARD	9000	99703	\$ 3,900.00
Asset Condition : Steward : SUNFLOWER SYSTEMS Request : INACTIVE RECEIVAL - 09/21/1999 Custodian : FRAZIER KRISTEN S 020966 Requester : OWNER REPOSITORY User : Requester Phone : Pick-up Location : LIVERMORE Deliver-to Location : LIVERMORE BUILDING : G ROOM : 200 BUILDING : INACTIVE ROOM : RCV							
1066	INV 0451		COMPUTER MINI	HEWLETT-PACKARD	9000	99704	\$ 3,900.00
Asset Condition : Steward : SUNFLOWER SYSTEMS Request : INACTIVE RECEIVAL - 09/21/1999 Custodian : FRAZIER KRISTEN S 020966 Requester : OWNER REPOSITORY User : Requester Phone : Pick-up Location : LIVERMORE Deliver-to Location : LIVERMORE BUILDING : G ROOM : 200 BUILDING : INACTIVE ROOM : RCV							

Figure 4-8: Assets with Pending Excess/Inactive Requests Report Output

EXCESS/INACTIVE RECEIVAL FORM

The **Excess/Inactive Receival Form** report prints a generic form, with a barcode, that can be used for excess and inactive asset pick-up. This form also tell you if there are any outstanding excess or inactive requests to the property storage organization.

Use the **Excess/Inactive Receival Form** report to print the form for excess and inactive asset pick-up. To print the form, perform the following:

Step 1. Select either **Inactive > Inactive Reports** or **Reports > Inactive Reports**.

Step 2. Click the **Excess/Inactive Receival Form**.

NAVIGATION

- Click **Inactive**
- Click **Inactive Reports**
- or...
- Click **Reports**
- Click **Inactive Reports**
- Click **Excess/Inactive Receival Form**



Figure 4-9: Selecting the Excess/Inactive Receival Form

ASSETS WITH EXCESS/INACTIVE RECEIVAL FORM REPORT PARAMETERS

The following report parameters were used to generate the report.

Sunflower Enterprise - Production 4.5.0.0 Inactive Reports
ASMN6110 Excess/Inactive Receival Form

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

Interest Type/Identifier: INVENTORY ASSET []
 Request No: []
 Steward: []
 Include the Steward child Organizations

Custodian: Identifier [], Last Name [], First [], Mid [], Prefix [], Suffix []
 User: Identifier [], Last Name [], First [], Mid [], Prefix [], Suffix []
 Requester: Identifier [], Last Name [], First [], Mid [], Prefix [], Suffix []

Interest Type to Print With Request: INVENTORY ASSET []
 Include Only Assets With an Active Interest: N []

Request

Excess Requests
 Inactive Requests
 In-Place Requests

Include Only Requests Recorded Between [] (MM/DD/YYYY) and [] (MM/DD/YYYY)

Pick-Up Location

Pick-Up Location: Site/Off-Site Type [], Sdv1 Type: BUILDING [], Sdv1 Identifier [], Sdv2 Type: ROOM [], Sdv2 []

Deliver-To Location

Deliver-To Location: Site/Off-Site Type [], Sdv1 Type: BUILDING [], Sdv1 Identifier [], Sdv2 Type: ROOM [], Sdv2 []

How Would You Like the Assets to be Sorted?

1: PICK-UP LOCATION [] 2: IDENTIFIER [] 3: IDENTIFIER [] 4: IDENTIFIER []

[Submit] [Reset]

[Inactive Reports](#)

Figure 4-10: Excess/Inactive Receival Form Report Parameters

EXCESS/INACTIVE RECEIVAL FORM REPORT OUTPUT

Review the **Excess/Inactive Receival Form** report output to determine if there are any outstanding requests for excess or inactive asset transfers to your organization. The following report reveals several assets that have been requested for transfer to the inactive organization.

```

Sunflower Enterprise           Inactive Receival Form
ASMN61110                      05/22/2006 16:31

1073

:
:
: 08/21/1998
:

Identifier :
Manufacturer : STEELCASE           Model : DESK 6 FT
Official Name : DESK 6 FT         Asset Type : OFFICE EQUIPMENT
Quantity :                          UoM :
Description :
Serial Number : 01                Value : $           700.00
Flags :                          Acquisition Date : 01/01/1995
Manager : SUNFLOWER SYSTEMS      Owner : SUNFLOWER SYSTEMS
Steward : SUNFLOWER SYSTEMS     Rep :
Custodian :                      Phone :
Alternate Phone :
User : OWNER REPOSITORY
Inactive Type : CONTROLLED STORAGE
Available? : N                   Duration (yrs) :      (years)
Recharge Identifier :

Unique Rqants :

Pick-up Location
LIVERMORE
BUILDING : G   ROOM : 22

Deliver-to Location
LIVERMORE
BUILDING : INACTIVE   ROOM : RCV

Comment :

```

Figure 4-11: Excess/Inactive Receival Form Report Output

CREATE INACTIVE ASSETS

Sunflower simplifies the process of creating and maintaining assets for your organization. As an asset management professional, you will often find the need to add individual assets to your property management system of record. Sunflower provides several screens and interfaces that simplifies the process of adding individual assets (with or without purchase order information), updating asset information and transferring assets to and from your organization. Whether you are creating a simple asset from scratch, a composite asset from multiple purchase orders, or if you need to create multiple inactive assets at once from a single purchase order line, Sunflower enables you to complete these and similar transactions with the Inactive module. In this section, you will learn how to inactive asset records using the following methods:

- “Create Inactive Assets From Inactive Receival Requests” on page 338
- “Create Inactive Assets from Scratch” on page 339 (Maintain Inactive Assets screen)
- “Mass Asset Creation” on page 347

Sunflower provides a purchasing interface to use data that was generated from a purchasing application to create an asset.

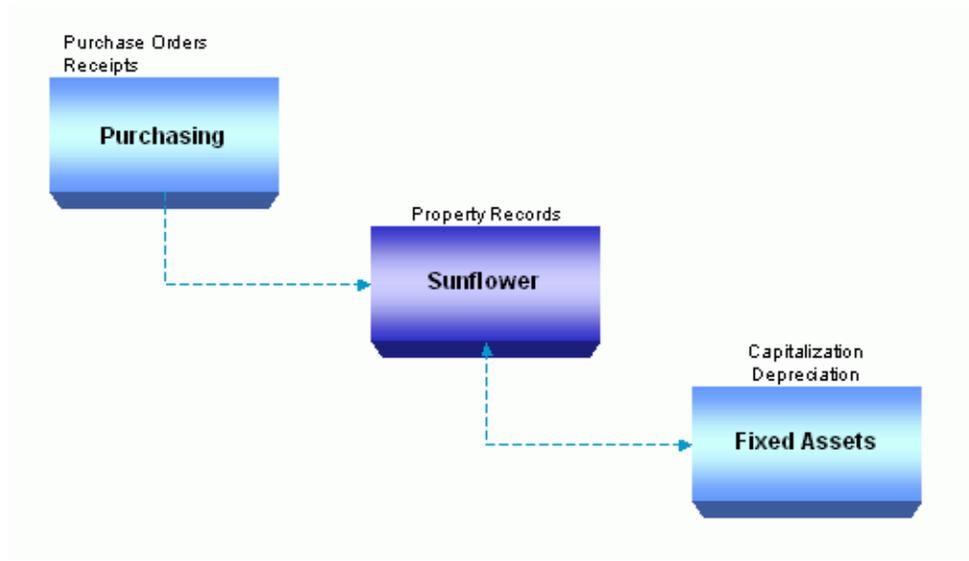


Figure 4-12: Tying Sunflower Systems Into the Financial System Process

Those assets that you purchase are recorded as an acquisition cost. A procurement document can be a PO, delivery order, credit card purchase, or any other purchase order document. In most cases, the cost of an asset is equal to the amount of money exchanged for the asset and any associated costs to prepare the asset for its intended use. These associated costs can include freight, shipping, taxes, site preparation, installation, testing, and reconditioning.

Once a purchase order is transmitted to Sunflower, a shell asset is created. Based upon your business processes you can create asset records under the following situations:

- PO created and sent to vendor, item(s) have not yet arrived (shell record). Awaiting additional information such as Serial Number, Location, User, etc.
- PO created and sent to vendor, item(s) have arrived (actual record). Entry of all related data can be performed.

A Property Manager will determine which PO lines make up an asset. If you want to capitalize the newly created asset, you can reflect the capital asset details in the Sunflower Assets Finance module or a 3rd party financial system via a real-time process interface. Alternatively, you can create inventory asset records from scratch with the Inactive module.

CREATE INACTIVE ASSETS FROM INACTIVE RECEIVAL REQUESTS

Staff throughout your organization will make requests for inactive asset receipt as the need to store assets arise. Once the request is made, how do your counterparts in the property storage know that pending requests are awaiting approval? Depending on your internal business process, the property storage staff can use reports to review pending asset receipt requests and approve or deny receipt requests as deemed appropriate.

For more information on running reports for pending receipt requests, see: "Assets with Pending Excess/Inactive Requests Report" on page 330 and "Excess/Inactive Receipt Form" on page 333.

For more information on creating inactive assets from an inactive receipt request, see, "Accept Inactive Receipt Requests" on page 326.

CREATE INACTIVE ASSETS FROM SCRATCH

Similar to the role that the **Maintain Inventory Assets** screen plays in the management of inventory assets, the **Maintain Inactive Assets** screen is an integral feature that can be used frequently in the day-to-day management of inactive assets. Use the **Maintain Inactive Assets** screen to create inactive assets in an ad hoc manner. For example, you may want to track assets that your organization fabricates for custom applications and stores until they are ready to be deployed for active service. These assets were not purchased so there is no purchase order information to refer to when creating the asset records for the newly fabricated items. In addition, the **Maintain Inactive Assets** screen enables you to update the descriptive information (e.g. **Location**, **Custodian**, and **Asset Condition**) for an inactive asset, as well as create catalog entries, add comments, attachments or pictures.

Scenario: The following graphic illustrates how to create an inactive asset from scratch. In this example, you will learn how to create an inactive asset record for a new computer that you want to store until it is ready for active service deployment.

- NAVIGATION**
- Click **Inactive**
 - Click **Maintain Inactive Assets**

The screenshot shows a software window titled "Maintain Inactive Assets - asin2010 (Page 1 of 3)". The form is divided into several sections for data entry:

- Identifier:** XX1234
- Unique Name:** (empty)
- Catalog Identifier*:** Z7
- Manufacturer:** APPLE
- Official Name:** COMPUTER-PERSONAL
- Serial Number:** XX4321
- Initial Event:** RECEIVE INACTIVE ASSET
- Asset Value*:** \$1,500.00
- Asset Condition:** 5 USED - FAIR
- Inactive Type:** CONTROLLED STORAGE
- Recharge Identifier:** A2101
- Unique Requirements:** KEEP DRY
- Activity Status:** STORAGE
- Manager:** SUNFLOWER SYSTEMS
- Steward:** SUNFLOWER SYSTEMS
- Custodian:** JODOE (Last Name* DOE)
- User:** (Last Name* empty)
- Location*:** LIVERMORE_BUILDING_INACTIVE_ROOM_RCV
- Document*:** (empty)
- User Fields*:** (empty)
- Global User Fields*:** (empty)

Additional fields on the right side include:

- Type:** Existing Interest Asset
- Type Identifier:** (empty)
- Commodity:** (checkbox)
- Parents:** (empty)
- Children:** (empty)
- C/A/P:** (empty)
- Model:** M5600
- Model Name:** POWER MAC
- Drawing No:** (empty)
- User Fields*:** (empty)
- Acquisition Date:** 08/04/2005
- Effective Date:** 08/04/2005
- Responsibility Date:** 08/04/2005
- Expected Return Date:** (empty)
- Flags*:** S
- Duration (yrs):** 1.0
- Available to others?:** N
- Length:** (empty)
- Width:** (empty)
- Height:** (empty)
- Activity Type:** (empty)
- Owner:** SUNFLOWER SYSTEMS
- Rep:** (empty)
- First:** JOHN (Mid empty)
- First:** (Mid empty)

At the bottom of the form, there are buttons for "Page 2", "Commodity", and "Comment".

Figure 4-13: Creating Inactive Assets From Scratch

- Step 1.** Navigate to the **Maintain Inactive Assets** screen.
- Step 2.** Enter a new asset identifier in the **Identifier** field for the new computer. In this case, the asset identifier is *XX1234*.
- Step 3.** Enter the core asset information accordingly. For more information, see “Maintain Inactive Assets Field Terms” on page 341.
- Step 4.** Enter the appropriate information in the following fields to add the inactive interest asset-specific information:
- **Inactive Type** -- indicates what type of inactive status to assign to the asset.
 - **Available to others?** -- indicates if the asset can be used by others while in its inactive status.
 - **Length/Width/Height** -- indicates the asset's dimensions for storage purposes.
 - **Recharge Identifier** -- indicates the identifier assigned to the recharge general ledger account.
 - **Unique Requirements** -- indicates any unique storage requirements for the asset.
- Step 5.** Update the new inactive asset's information, as needed. (e.g. **Asset Condition** as *USED - GOOD*. **Location** updates etc.)
- Step 6.** Click the **Save** icon to save your inactive asset record.

NOTE: If you do not enter a value in a required field, Sunflower prompts you to do so.

MAINTAIN INACTIVE ASSETS FIELD TERMS

The following table lists the details of each field on the **Maintain Inactive Assets** screen.

Maintain Inactive Assets Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
Identifier	Identifier assigned to an inactive asset.
Type (Asset Identifier)	<p>The asset identifier Type assigned to the asset, (e.g. tagueable, non-tagueable, etc.). An example of how you might use this feature is to indicate that an asset is being tracked but is not directly tagueable. You may have assets that would be impractical to try to affix a barcode or other type of identifier directly to the asset. By indicating that the asset is not directly tagueable, you can alert your staff to look for the asset identifier in another logical location when indicating the asset is not tagueable.</p> <p>Asset identifier types are maintained as Domains in the Administration module. You must create your asset identifier types before you can assign them throughout the application.</p>
Existing Interest Asset Type Identifier	<p>Specifies the type of interest asset (e.g. inventory, agreement, inactive, excess etc.) Leave blank if this asset record does not exist in the systems as another interest asset type.</p> <p>For example, you may have an inventory asset with its own inventory asset identifier that you want to convert into an inactive asset. You can reference an existing inventory interest asset Type with its corresponding inventory interest asset identifier and Sunflower populates all of the corresponding information for that asset in the Maintain Inactive Assets fields.</p>
Unique Name	<p>The Unique Name is a data set on items that is globally unique, unambiguous and robust enough to ensure that information is consistent through the life cycle of the asset and supports the multifaceted business applications and users.</p> <p>The Unique Name enables organizations to track an asset irrespective of the custodians who are accountable for the asset during its lifetime.</p>
Default Location	Specifies the default location for an inventory asset. For assets that are frequently borrowed from a Check-In-Out Point , the Default Location specifies the asset's location when it is not loaned out to a borrower.
Catalog Identifier	<p>The Catalog Identifier field automatically populates upon specifying the designated Manufacturer and Model Number combination. Alternatively, if you know the Catalog Identifier, you can enter the value here and the corresponding manufacturer and model number information is populated based on the Catalog Entry.</p> <p>For more information about Catalog Entries, see the Catalog Management chapter of the Sunflower Enterprise Administration Guide.</p>
Commodity	The Commodity asset checkbox is marked if the asset is designated as an asset using the Commodity button at the bottom of this page.
Parents	<p>The Parents field displays the number of parent records for the current asset record that you are viewing. If an asset has a parent asset association, the number of associations displays in the Parents field. An asset can have multiple parents.</p> <p>Double click in the Parents field to view the detail parent record information on the Maintain Asset Structures screen where you can view the parent record information for the selected asset.</p>

Maintain Inactive Assets Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
Children	<p>The Children field displays the number of child records for the current asset record that you are viewing. If an asset has a child asset association, the number of associations displays in the Children field. An asset can have multiple children.</p> <p>Double click in the Children field to view the detail child record information on the Maintain Asset Structures screen where you can view the child record information for the selected asset. For more information about Parent Child assets, see Chapter 1, "Maintain Asset Structures (Parent/Child Relationships)" on page 43.</p>
C/A/P	The C/A/P field indicates if there is a comment C , attachment A , or picture P attached to the selected inactive asset record.
Manufacturer	Double-click to select from the list of values a valid manufacturer name. If the value you are looking for does not appear in the list of values, use the Administration module to add the new Manufacturer name to the list of valid Organizations . For more information about adding manufacturers, see the People and Organization chapter of the Sunflower Enterprise Administration Guide.
Model	Double-click to select from the list of values. If the value you are looking for does not appear in the list of values, use the Management module Maintain Catalog Entries screen to add the corresponding manufacturer and model number combination.
Official Name	The Official Name field automatically populates upon specifying the Manufacturer and Model Number . You create Official Names for Manufacturer and Model combinations by using the Maintain Catalog Entries screen.
Serial Number	Enter the serial number for the asset. If there is no serial number for the asset, leave blank.
Drawing No	Enter the drawing number used to design and construct the asset. Generally used for architectural and construction projects.
Initial Event	Double-click to select from the list of values. This field can be extended to capture your business practice specific information. Asset Initial Events are maintained as Domains in the Administration module. You must set up your asset initial events before you can assign them throughout the application.
User Fields	Double-Click to open up this complex field for data entry. In this case, the User Field captures the context based information for a Purchase Initial Event has been extended to capture the Purchase Order , Purchase Order Line and Purchase Account information from a PO. Leave Blank if there is no corresponding PO information for the corresponding initial event. You can define the context for the user fields specific to the screens and interest assets. User fields enable you to personalize the application to provide additional information that is not available when using the standard application. For more information, see Chapter 1, "Edit Inventory Asset Records" on page 30.
Asset Value	<p>Double-click to open the Asset Value Components block and specify the asset value components.</p> <p>Asset Value Types are Domains that you specify in the Administration module. You will define these types based on your organization's business practices. The value components of an asset can be comprised of several different activities (e.g. acquisition cost, shipping, site preparation, installation, upgrades etc.).</p> <p>Enter the cost of the asset. Do not enter \$, commas, or .00. 1500 is the same as \$1,500.00.</p> <p>You can use the Administration module to extend the Asset Value Component user defined field (User Fields) to accommodate your business practices.</p> <p>The Cap? (Capitalize?) field tells you if an asset is capitalized. You can capitalize an asset with the Finance module using the Capitalize Financial Assets screen. It is a display only field on this screen.</p>
Acquisition Date	Enter the date the asset was purchased. MM/DD/YYYY format. Double-click to use the Calendar function to select your date from Calendar pop-up window.

Maintain Inactive Assets Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
Responsibility Date	Enter the date in which you took ownership of the asset. MM/DD/YYYY format. Double-click to use the Calendar function to select your date from Calendar pop-up window.
Asset Condition	Used to specify the current working quality of the property. Select from the list of values the appropriate condition of the asset. If you cannot find the appropriate selection, you can create the value in the Administration module by using the Maintain Asset Conditions screen. For more information about Asset Conditions, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.
Effective Date	The date that the asset becomes active in the Sunflower database. MM/DD/YYYY format. Double-click to use the Calendar function to select your date from Calendar pop-up window.
Expected Return Date	When loaning property, enter the date that you expect to have the property returned. MM/DD/YYYY format. Double-click to use the Calendar function to select your date from Calendar pop-up window.
Inactive Type	Indicates the type of inactive status assigned to the asset.
Flags	Double-click to open the Asset Flag complex field to specify special conditions for the asset. (e.g. sensitive, hazardous etc.) Leave blank if there are no special conditions to apply to the asset. In this case, the computer has been marked as sensitive. Although the computer itself may be benign, the data residing on the computer hard drive may be of a sensitive nature. To add asset flags, use the Administration module Define Asset Flags screen. (Other typical flags might be Flammable, Keep Dry, Corrosive, etc.) For more information about Asset Flags, see the User Extensibility chapter of the Sunflower Enterprise Administration Guide.
Duration (yrs)	Enter the duration of the asset's inactive period in the Duration (yrs) field. The length of the inactive period is designated in years (e.g. 0.5 = 1/2 year).
Available to others?	Indicates if the asset can be used by others while in its inactive status.
Recharge Identifier	Enter the recharge general ledger account to charge storage and related costs for inactivating the asset in the Recharge Identifier field.
Length Width Height	Length/Width/Height -- indicates the asset's dimensions for storage purposes.
Unique Requirements	Specify any special considerations for the handling and storage of the asset (e.g. hazard, special storage needs, etc.) in the Unique Requirements text box.
Activity Status	Used to specify the current state of the property. (e.g. In Service, Inactive, etc.) You can add activity statuses using the Administration module Maintain Activity Statuses screen. For more information about Activity Statuses, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.
Activity Type	Enter the Activity Type for the asset. For example, you may want to use an asset for various research projects. You can update the Activity Type field to reflect the project that is currently using the asset.
Manager	Specify the managing organization of the asset. You create managers by using the Administration module Maintain Organizations screen and assigning the organization as a <i>Manager</i> organization structure.
Owner	Specify the owning organization of the asset. You create owners by using the Administration module Maintain Organizations screen and assigning the organization as an <i>Owner</i> organization structure.

Maintain Inactive Assets Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
Steward	Specify the steward of the asset. You create stewards by using the Administration module Maintain Organizations screen and assigning the organization as a Steward organization structure.
Rep	The name of the Steward's primary ACR (Asset Center Representative).
Custodian	Specify the custodian of the asset. You can select a Custodian by either their Last Name, First Name or Identifier. A Custodian identifier can be an employee ID or badge number that is unique to that individual. You create individuals in Sunflower applications by using the Administration module Maintain People screen.
User	Specify a specific user of the asset if applicable. You can select a User by either their Last Name, First Name or Identifier. A User identifier can be an employee ID or badge number that is unique to that individual. You create individuals in Sunflower applications by using the Administration module Maintain People screen.
Location	Double-click to open the Location complex field and assign the asset location accordingly. You can create locations using the Administration module Maintain Locations screen and its supporting maintenance screens to capture your organization's set of locations. For more information about setting up locations, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.
Document	Enter the related asset Document information such as type of supporting documentation, documentation identifier, storage type and organization for an asset. You can use the Administration module Maintain Domains screen to create and edit the Document Type and Document Storage Type domains to fit your business practices.
User Fields	User Defined Fields (UDFs) data entry is based upon your business practices/needs. User fields enable you to personalize the application so that users can provide additional information that is not available when using the standard application. In this example, the UDF is a context free extension of the Inventory Asset State. You can provide the asset weight in this case. For more information, see Chapter 1, "Edit Inventory Asset Records" on page 30.
Global User Fields	Global User Defined Fields (UDFs) data entry is also based upon your business practices/needs. Global user field information is applicable to all interest asset states. This field is tied the Asset State In this example, the UDF is a context based extension of the Asset State which is tied to the Catalog Entry Asset Type information for this asset.
Page 2	Click to display the pop-up window for Page 2 which contains the Catalog Entry information for this asset.
Comment	Click to open the Comments, Attachments and Pictures screen. Add any supporting comments, attachments or pictures for the asset.
Re-Request	You can use the Re-Request button to create a new request to transfer the displayed asset if the prior request was denied. For more information about asset transfers, see Chapter 1, "Transfer Assets" on page 49.
Commodity	Click to open the Commodity Information screen to enter commodity specific units of measure and quantities.

MAINTAIN INACTIVE ASSETS - PAGE 2

Use the **Page 2** button to view additional catalog information. Most of these fields are display only when viewed in this manner. You must use the **Maintain Catalog Entries** screen to create or edit the **Catalog Information**. You can, however, use this screen to provide override values for **Service Life**, **Salvage Value %** or **Replacement Value**.

NAVIGATION

- Click Inactive
- Click Maintain Inactive Assets
- Click Page 2

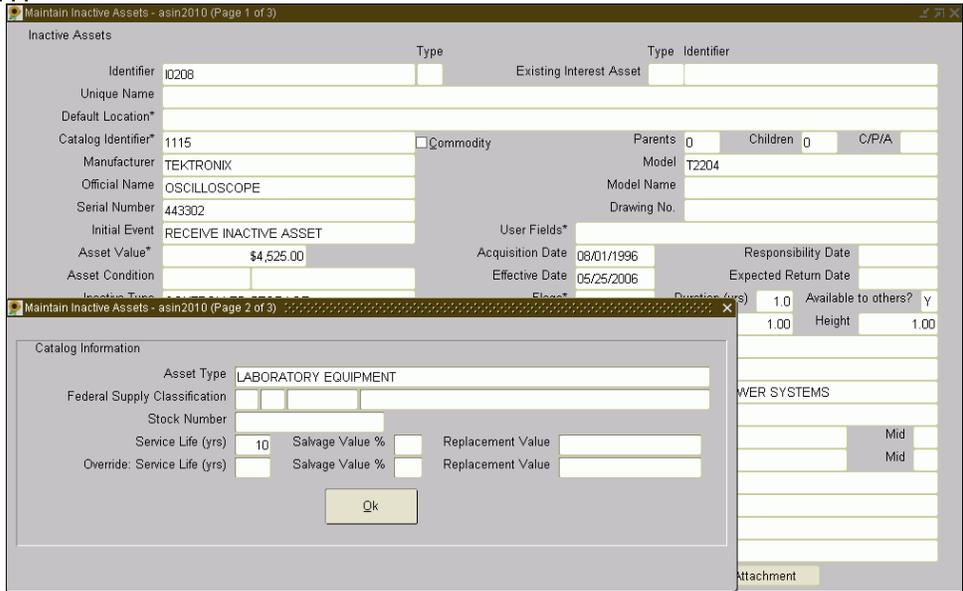


Figure 4-14: Displaying Page 2 of the Maintain Inactive Asset Screen

Maintain Inactive Assets Page 2 Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
Asset Type	Displays the type of asset assigned to this asset's catalog entry. Display only.
Federal Supply Classification	Displays the assigned Federal Supply Classification Group Number, Class Number, National Identification Number and long name for the asset. Display only.
Stock Number	Specifies the assets internal stock number or identification. Display Only
Service Life Override:	The assigned catalog entry service life (in years) for the specified asset type. Display only. You can use the Override Service Life field to enter an override value for the asset's service life.
Salvage Value % Override:	The assigned catalog entry Salvage Value % for the specified asset type. Display only. You can use the Override Salvage Value % field to enter an override value for the asset's Salvage Value % . Enter a value between 1 and 100.
Replacement Value Override:	The assigned catalog entry replacement value for the specified asset type. Display only. You can use the Override Replacement Value field to enter an override value for the asset's replacement value.

MASS ASSET CREATION

Sunflower provides two methods for creating multiple assets. You can use either the **Maintain Inactive Assets Duplication** feature to create multiple asset records with similar information or if you have multiple assets on a single PO line item, the **PO Interface Duplication** feature is a quick and easy way to create several assets at once. This section covers how to create multiple assets using the following methods:

- “Maintain Inactive Assets - Duplication” on page 348
- “PO Interface - Duplication” on page 349

MAINTAIN INACTIVE ASSETS - DUPLICATION

If you have several assets of the same type that you need to create and place in storage until they are ready to be issued, you can use the **Maintain Inactive Assets Duplication** feature to create new asset records with the same descriptive text. You must supply the duplicate assets with a unique asset **Identifier** and **Serial Number**. After duplicating the new assets, verify and update the **Location**, **Custodian**, and **User** information for each duplicate asset.

Scenario: The following graphic illustrates how to create duplicate records with the Maintain Inactive Assets Duplication feature.

NAVIGATION

- Click **Inactive**
- Click **Maintain Inactive Assets**
- Click **Open a Record**
- Click **F4 or Shift+F6**

The screenshot shows a software window titled "Maintain Inactive Assets - asin2010 (Page 1 of 3)". The window contains a form with the following fields and values:

- Identifier:** 0008
- Existing Interest Asset:** (empty)
- Unique Name:** (empty)
- Default Location*:** (empty)
- Copy to Location?:**
- Catalog Identifier*:** 1115
- Commodity:** (empty)
- Parents:** (empty)
- Children:** (empty)
- C/P/A:** (empty)
- Manufacturer:** TEKTRONIX
- Model:** T2204
- Official Name:** OSCILLOSCOPE
- Model Name:** (empty)
- Serial Number:** 443302
- Drawing No.:** (empty)
- Initial Event:** RECEIVE INACTIVE ASSET
- User Fields*:** (empty)
- Asset Value*:** \$4,525.00
- Acquisition Date:** 08/01/1996
- Responsibility Date:** (empty)
- Asset Condition:** (empty)
- Effective Date:** 05/25/2006
- Expected Return Date:** (empty)
- Inactive Type:** CONTROLLED STORAGE
- Flags*:** (empty)
- Duration (yrs):** 1.0
- Available to others?:**
- Recharge Identifier:** (empty)
- Length:** 1.00
- Width:** 1.00
- Height:** 1.00
- Unique Requirements:** (empty)
- Activity Status:** STORAGE
- Activity Type:** (empty)
- Manager:** SUNFLOWER SYSTEMS
- Owner:** SUNFLOWER SYSTEMS
- Steward:** SUNFLOWER SYSTEMS
- Rep:** (empty)
- Custodian:** 050598
- Last Name*:** DOE
- First:** JOHN
- Mid:** (empty)
- User:** 050598
- Last Name*:** DOE
- First:** JOHN
- Mid:** (empty)
- Location*:** LIVERMORE_BUILDING_E_WHG_02
- Document*:** (empty)
- User Fields*:** (empty)
- Global User Fields*:** (empty)

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

Figure 4-15: Creating Duplicate Asset Records

- Step 1.** Click either F4 or Shift + F6 to duplicate an asset. Notice that *Duplicate Record* appears at the top of the screen.
- Step 2.** Enter a new **Identifier** for the duplicate asset.
- Step 3.** Enter a new **Serial Number**.
- Step 4.** Verify or update the **Location**, **Custodian**, and/or **User Fields**.
- Step 5.** Click the **Save** icon to save your asset record.

PO INTERFACE - DUPLICATION

The **PO Interface Duplication** feature enables you to create multiple asset records from a single line item. For example, a common exercise could involve the purchase of several computers from the same manufacturer for the same model. Rather than creating each asset record from scratch, use the **PO Interface Duplication** feature to replicate the common information for each item from the selected line item. Although much of the asset information is the same, you must assign a unique asset identifier for each item. After creating an asset or specifying an existing asset, the details of that asset can be duplicated to create new assets.

Scenario: The following graphic illustrates how to create duplicate records with the PO Interface. For more information about how to use the PO Interface to allocate line items, see Chapter 9, "PO Interface" on page 563.

NAVIGATION

- Click **Inactive**
- Click **Process Inactive Asset PO Interface Records**
- Click **Number in Duplicate field**
- Click **Times** button

The screenshot shows the 'Process Inventory Asset PO Interface Records' window. On the left, the 'Assets' list has 'XX1230' checked and 'XX1231' highlighted. Below the list, the 'Duplicate' field contains the number '1' and the 'Times' button is highlighted. The right pane shows the asset details for 'SERVER' with fields for Identifier Type, Catalog*, Manufacturer, Model, Official Name, Serial Number, Acquisition Date, Effective Date, Responsibility Date, Activity Status, Asset Condition, Manager, Owner, Steward, Custodian Identifier, Last Name, User Identifier, Location*, and Activity Type.

Figure 4-16: Duplicating Asset Records with the PO Interface

Enter the number of duplicate assets that you wish to create in the **Duplicate** field. Press the **Times** button to add the new assets in the **Assets** block where they are assigned incremental asset identifiers or a *Tag Needed* indicator. Verify that each asset has been assigned a valid asset identifier. Modify the details of each asset before saving. When using an alphanumeric value asset identifier, any number of initial alpha characters terminated by a numeric value of one or more digits increments the numeric portion of the asset identifier and is assigned to each duplicate asset.

MANAGE INACTIVE ASSETS

The Inactive module facilitates the detailed tracking of the relationships between assets, organizations and people as they change over time. After you acquire your assets, you will need to assign a location, a responsible party and organization for each asset. Sunflower enables you to maintain your inactive assets by using several Inactive module screens to update the attributes of your inactive assets. Complimenting the **Maintain Inactive Assets** screen are the supporting Inactive module screens that can assist you in the day-to-day management of your inactive assets.

The **Request Inactive Assets Change** screen enables you to create and accept asset transfer requests for other steward organizations. To provide for individual and organization transfers, Sunflower uses a request/accept/deny model to ensure that accountability is not transferred without consent of both parties. This permits an organization or individuals to request that another organization or individual become accountable for an asset.

The **Change Inactive Assets Information** screen enables you make simultaneous mass updates to multiple assets within your organization. Another useful Inactive module feature is the **Maintain Asset Structure** screen that enables you to manage your diverse set of Parent/Child asset structures. Finally, the Inactive module reports enable you to view the details and history of your inactive assets.

The following sections will detail how to use the above inactive module features to manage and capture your inactive assets and related activities efficiently.

- “View Inactive Asset Details” on page 351
- “Edit Inactive Asset Details” on page 359

Further functions that you can use to manage inactive assets is covered extensively in the Inventory Assets chapter as follows:

- Chapter 1, “Edit Inventory Asset Records” on page 30
- Chapter 1, “Edit Comments, Attachments and Pictures” on page 32
- Chapter 1, “Maintain Asset Structures (Parent/Child Relationships)” on page 43
- Chapter 1, “Transfer Assets” on page 49
- Chapter 1, “Transfer Inventory Asset Value” on page 65
- Chapter 1, “Maintain Inventory Asset Ongoing Events” on page 66
- Chapter 1, “Maintain Inventory Asset User Fields” on page 68

VIEW INACTIVE ASSET DETAILS

The **Asset Summary and History** screen is one of the most widely used screens. The **Asset Summary and History** screens enable you to view the current and historical information for assets based on a specific interest asset (e.g. Agreement, Management, Finance, Inactive, and Excess). You can perform a quick search to find current and historical information for a single asset or a group of assets. Sunflower maintains a history of every change made to an asset.

Scenario: The following graphic illustrates how to review an asset and its history.

NAVIGATION

- Click **Inactive**
- Click **Inactive Asset Summary and History**

The screenshot displays the 'Inactive Asset Summary and History' window for asset identifier 0202. The window title is 'Inactive Asset Summary and History - asmn2055 (Page 1 of 3)'. The interface includes a search bar for the identifier (0202) and a 'Current Identifier' field (0202). Below the search bar are tabs for 'Timeline' and 'Details', with 'Details' selected. A checkbox for 'Include history' is checked. The main area contains various fields for asset information:

- Manufacturer:** TEKTRONIX
- Official Name:** OSCILLOSCOPE
- Serial Number:** 78902
- Initial Event:** RECEIVE INACTIVE ASSET
- Final Event:** (empty)
- Asset Value:** \$2,500.00 NOT CAPITALIZ
- Asset Condition:** (empty)
- Act Status/Type:** STORAGE
- Manager:** SUNFLOWER SYSTEMS
- Steward:** SUNFLOWER SYSTEMS
- Custodian:** DOE JOHN 050598
- User:** FRAZIER KRISTEN S 020866
- Location:** LIVERMORE_BUILDING_E_WHG_02
- Document:** (empty)
- User Fields:** (empty)
- Global User Fields:** (empty)
- Model:** T11209
- Model Name:** (empty)
- Drawing No.:** (empty)
- User Fields*:** (empty)
- User Fields*:** (empty)
- Acquisition Date:** 01/01/1997
- Responsibility Date:** 01/01/1997
- Effective Date:** 06/21/1998
- Expected Return Date:** (empty)
- Flags:** (empty)
- Activity Type:** (empty)
- Owner:** SUNFLOWER SYSTEMS
- Rep:** (empty)

At the bottom of the window are two buttons: 'Creator Information' and 'Interest Details'.

Figure 4-17: Inactive Asset Summary and History

- Step 1.** Navigate to the **Asset Summary and History** screen.
- Step 2.** Select the **Include History** checkbox.
- Step 3.** Enter the asset identifier in the **Identifier** field.
- Step 4.** Press the tab key to display the summary page for the asset record.

To view the history for multiple assets, use the **Query Criteria** screen to search for and retrieve one or more assets based on the query criteria that you select.

- Step 5.** Scroll up and down to observe the changes to the asset. The latest information displays as the current record reflecting the changes. Click the **Next Record** icon to view the history.
- Step 6.** Click the **Details** icon adjacent to an attribute field on the **Inactive Asset Summary and History** screen to view the details of that attribute. For example, click the **Details** icon next to the **Manufacturer** field to display the **Review Organization** screen in display only mode.
- Step 7.** Click the closeout box (X) to exit out of the **Review Organization** screen and return to the **Asset Summary and History** screen.
- Step 8.** Click the **Timeline** tab to view the selected asset event, resolutions and requests history. For more information about how to view the history of asset events, see “Review The Asset Event History” on page 353.

REVIEW THE ASSET EVENT HISTORY

Use the Asset Timeline feature to review the events of an identifiable asset. The Asset Timeline is a simple query interface that enables you to select Events, Resolutions, Open Requests and Closed Requests to retrieve relevant information for a specified asset.

Scenario: The following graphic illustrates how to use the Asset Summary and History Timeline tab to review the history of an asset. This is a display only screen.

NAVIGATION

- Click Inactive
- Click Inactive Asset Summary and History
- Select the Include History checkbox
- Click the Timeline tab

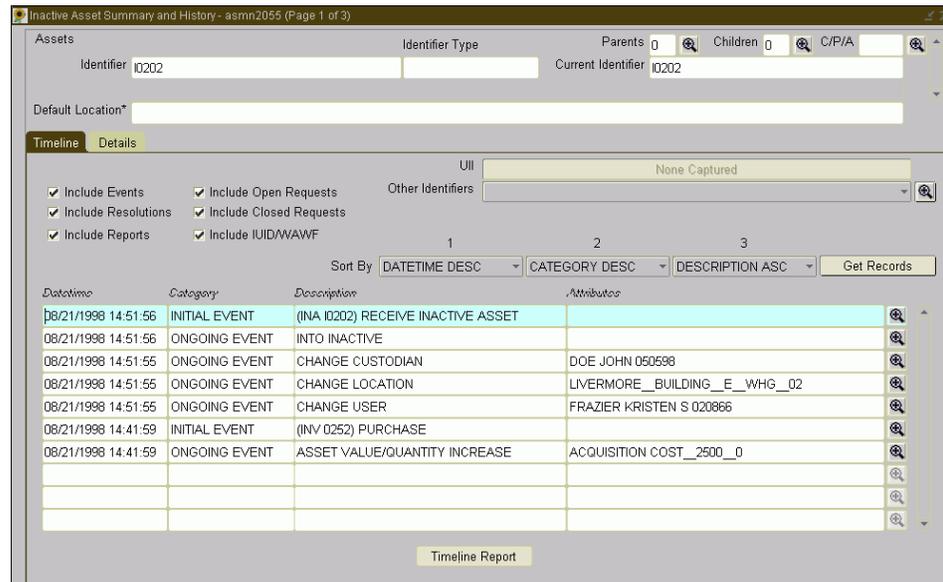


Figure 4-18: Viewing Asset Event History

Step 1. Navigate to the **Inactive Asset Summary and History** screen.

Step 2. Click the **Timeline** tab.

Step 3. Select asset events whose history you want to review from the following checkboxes:

- **Include Events**

Events reflect the asset activity that occurs during the lifecycle of the asset. For example, **Initial Events** (e.g. Purchase, Subject to Agreement, Receive Inactive Asset), **Ongoing Events** (e.g. Change of Custodian, Change of User, Change of Location, Added to Agreement, Asset Value/Quantity Increase) and **Final Events** (e.g. Transfers, Retire, Lost Damaged Or Destroyed, Obsolete Asset)
- **Include Resolutions**

Resolutions are a method for verifying that an asset record is accurate during a review campaign (Physical Inventory). For example, a resolution could be the barcode scan of an asset during a review campaign.
- **Include Open Requests**

Open Requests reflect a transaction that is still awaiting a conclusion. For example, if you request a transfer of an asset to another custodian and that custodian has not closed the request by either accepting or denying the request, the request remains open and will appear on the **Timeline** grid as such. You (as the requestor of the transfer) can close the request by withdrawing the request.
- **Include Closed Requests**

Closed requests reflect a transaction that has been completed.
- **Include Reports**

Lists reports generated for the selected asset.
- **Include IUID/WAWF**

Lists whether the selected asset has generated a virtual asset, asset mark, and upload to the IUID Registry.

Step 4. Click the **Find** icon to enter the query mode and click the **Find** icon again to execute the query.

The system returns all of the selected events that occurred for the selected asset.

Step 5. Click the **Details** icon adjacent to a selected event on the **Timeline** grid to look at the details of an event.

Step 6. Click the closeout box (X) to exit out of the details view and return to the **Timeline** tab.

Step 7. Click on a column heading (e.g. **Category**) to change the sorting order of the events.

The default sort order for asset events is descending order for the event date (**DateTime**) and ascending order for the **Category** and **Description** columns.

Step 8. The **Ull** field displays the Ull generated for the selected asset. If a Ull has not been generated, the field displays *None Captured*.

Step 9. The **Other Identifier** field displays any other identifiers associated with the selected asset. Click the **Details** icon adjacent to this field to open the **View Asset Unique Identifier** screen.

This screen lists any additional identifiers associated with the selected asset and displays information about the Ull, Ull markings, whether the tag has been rendered and in what manner. (e.g Bagged or Tagged)

Step 10. Click the **Timeline Report** button to open the **Asset Timeline** report criteria page

Step 11. Click the **Record Properties** button to open the **Record Properties** inspector window.

ASSET SUMMARY AND HISTORY FIELD TERMS

The following table defines the purpose of each field on the **Asset Summary and History** screen.

Asset Summary and History Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
Include History	When you select the Include History checkbox, the screen returns current and historical records for the selected inventory asset. To view the other records, click the Previous Record and Next Record icons on the Tool Bar. If you do not select Include History , the screen returns only the current record for the inventory asset.
Next/Previous Record Indicator	The field adjacent to the Include History checkbox indicates if there are multiple records for the selected inventory asset. A v indicates that you are viewing the most current record for the asset. You can scroll through the earlier records of an asset by selecting the Next Record icon to view the history of that inventory asset. A ^v indicates that you can select either the Previous Record icon or Next Record icon to view the other records for the selected inventory asset. A ^ indicates that you are viewing the earliest record entry for the inventory asset and you can only scroll back through the inventory asset records using the Previous Record icon.
Parents	The Parents field displays the number of parent records for the current asset record that you are viewing. If an asset has a parent asset association, the number of associations displays in the Parents field. An asset can have multiple parents. Double click in the Parents field to view the parent record information on the Maintain Asset Structures screen.
Children	The Children field displays the number of child records for the current asset record that you are viewing. An asset can have multiple children. Double click in the Children field to view the child record information on the Maintain Asset Structures screen.
C/A/P	The C/A/P field indicates if there is a comment C , attachment A or picture P attached to the selected inventory asset record.
Identifier	The asset identifier is a unique tracking number for the assigned inventory asset. For example, a barcode, tag number or property identification number.
Identifier Type	Displays the identifier type, (e.g. barcode, RFID, or PIN).
Current Identifier	Displays the tracking identifier assigned to the inventory asset when the historical record was current.
Unique Name	Displays the unique name assigned to the inventory asset. The Unique Name is a data set on items that is globally unique, unambiguous and robust enough to ensure that information is consistent through the life cycle of the asset and supports the multifaceted business applications and users.
Default Location	Specifies the default location for an inventory asset. For assets that are frequently borrowed from a Check-In-Out Point , the Default Location specifies the asset's location when it is not loaned out to a borrower.
Manufacturer	Displays the name of the manufacturer of the asset.
Model Number	Displays the model number assigned to the asset by the manufacturer.
Official Name	Displays your organization's official description for the asset by a particular manufacturer and model combination.

Asset Summary and History Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
Model Name	Displays the model name assigned to the asset by the manufacturer.
Serial Number	Displays the serial number assigned to the asset by the manufacturer.
Drawing Number	Displays the drawing number used to design and construct the asset. Generally used for architectural and construction project use.
Initial Event	<p>Displays the asset initial event type. For example, <i>Purchase</i>, <i>Fabrication</i> or <i>Transfer</i>. An initial event is the asset's method of acquisition. Sunflower enables you to establish the initial event types that best suit your organization.</p> <p>You can use the Administration module to define other Asset Initial Event Types for your organization by using the Maintain Asset Event Types screen, select the <i>Asset Initial Event Type</i> category, and then add the Asset Event Type.</p>
User Fields	Displays user field information associated with the initial event.
Final Event	<p>Displays the asset final event type. For example, <i>Excess Sale</i> or <i>Transfer</i>. A final event is the method for recording the retirement of an asset.</p> <p>Sunflower enables you to capture each interest asset's final event. You can use the Management module to further define asset final events for your organization by using the Create Inventory Asset Final Events screen.</p>
User Fields	Displays user field information associated with the final event.
Asset Value	<p>Displays the value entered for the asset. Press the Edit icon to display the asset value component and summary detail.</p> <p>The field adjacent to Asset Value specifies if the asset is capitalized or not capitalized. You can capitalize an asset with the Finance module using the Capitalize Financial Assets screen.</p>
Acquisition Date	Displays the date the asset was acquired.
Responsibility Date	Displays the date the organization became responsible for the asset.
Asset Condition	Displays the current condition of the asset.
Effective Date	Displays the date the asset state becomes effective.
Expected Return Date	Displays the expected return date of an asset that has been loaned, stored, or sent out for repair.
Act Status/Type	Displays the current active status of an asset such as <i>In Service</i> or <i>Storage</i> .
Flags	Displays the flags assigned to an asset.
Activity Type	<p>Displays the asset's activity type.</p> <p>For example, the asset may be used for various research projects. You can view the Activity Type field for the project that is currently using the asset.</p> <p>You can create activity types with the Administration module by using the Maintain Domains screen, select the <i>Activity Type</i> domain and modify or add a new activity type.</p>
Manager	Displays the organization that manages the asset. A Manager may be the child organization of an Owner in a parent-child hierarchical structure.
Owner	Displays the organization that owns the asset. An Owner is the highest level of authority in a parent-child hierarchical structure. It can be the parent of a Manager .

Asset Summary and History Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
Steward	Displays the organization that is the steward of an asset. A Steward may be the child organization of a Manager in a parent-child hierarchical structure.
Rep	Displays the name of the steward's primary asset center representative.
Custodian	Displays the asset's custodian. A custodian is the person in possession of and responsible for the control and care of an asset.
User	Displays the user of an asset. The person that is authorized to use an asset.
Location	Displays the asset's location.
Document	Displays the type of supporting documentation, documentation identifier, storage type and organization for an asset.
User Fields	Displays user field information associated with the Inventory Asset.
Global User Fields	Displays global user field information applicable to the Core Asset record.
Creator Information	Click to open the Creator Information display box to view the Transaction Creator Information . You can click the Next Record and Previous Record icons to view the different asset state transactions for an asset. The Transaction Creator Information captures the date and time, and the creator of each transaction.
Interest Details	Click the Interest Details button to open the interest asset details screen. In this case, the Inactive Asset Details screen is open and available for editing.

EDIT INACTIVE ASSET DETAILS

If you have made a request to redeploy an asset, or if assets are moved about within the storage facility, then the asset record should be updated by the appropriate individual to reflect the asset's current status. Use the **Change Inactive Asset Information** screen to update the asset records with new information such as location, steward, and/or custodian.

Scenario: The following graphic illustrates how to view all assets within the Livermore warehouse that have been relocated to a different section of the warehouse.

NAVIGATION

- Click **Inactive**
- Click **Change Inactive Asset Information**

Ok	Δ	Identifier	Manufacturer / Model / Official Name
<input checked="" type="checkbox"/>		I0101	STEELCASE__DESK 6 FT__DESK 6 FT
<input checked="" type="checkbox"/>		I0102	TEKTRONIX__T11209__OSCILLOSCOPE
<input checked="" type="checkbox"/>		I0103	ACME PREFAB__T558FHY__TRAILER FOUNDATION
<input checked="" type="checkbox"/>		I0108	TEKTRONIX__T2204__OSCILLOSCOPE
<input checked="" type="checkbox"/>		I0201	STEELCASE__DESK 6 FT__DESK 6 FT
<input checked="" type="checkbox"/>		I0202	TEKTRONIX__T11209__OSCILLOSCOPE
<input checked="" type="checkbox"/>		I0203	ACME PREFAB__T558FHY__TRAILER FOUNDATION
<input checked="" type="checkbox"/>		I0208	TEKTRONIX__T2204__OSCILLOSCOPE
<input checked="" type="checkbox"/>		I0301	STEELCASE__DESK 6 FT__DESK 6 FT
<input checked="" type="checkbox"/>		I0302	TEKTRONIX__T11209__OSCILLOSCOPE

Figure 4-19: Transferring Multiple Asset Records to a New Location

Step 1. Select the items that you want to apply changes for selected assets. In this case, the **Location** for the assets assigned to Livermore Warehouse location are being updated.

Step 2. Enter the new location information of the assets by double-clicking in the **Location** complex field in the **New Information** block.

You can perform similar changes for the **Cust Org** (Custodian Organization), **Custodian**, **User** and **Document** fields.

Step 3. To return only the assets assigned to a particular location, place the cursor in the **Identifier** field of the **Assets** block and click the **Find** icon to open the **Query Criteria** screen.

Step 4. Enter *Livermore* in the **Site** field and click the **Execute** button to execute the query.

The query searches and retrieves from the database the assets assigned to the selected site and displays them in the **Assets** block. You can now assign the new location to the assets.

NOTE: You can deselect any assets that you do not want to apply changes to by unchecking the delta checkbox next to the inventory asset identifiers.

Step 5. Click the **Save** icon to save your changes to the selected assets.

INACTIVE ASSETS REPORT

Use the **Inactive Assets** report to shows the details of inactive assets. To run a report perform the following:

Step 1. Select either **Inactive > Inactive Reports** or **Reports > Inactive Reports**.

Step 2. Click the **Inactive Assets** report.

NAVIGATION

- Click Inactive
- Click Inactive Reports
- or...
- Click Reports
- Click Inactive Reports
- Click Inactive Assets



Figure 4-20: Inactive Assets Report

The following report parameters were used to generate the report.

Sunflower Enterprise - Production 4.5.0.0 Inactive Reports
ASIN6010 Inactive Assets

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

Manager:
 Owner:
 Steward:
 Include the Steward child Organizations

Official Name:
 Manufacturer:
 Model:

Custodian: Identifier Last Name First Mid Prefix Suffix

User: Identifier Last Name First Mid Prefix Suffix

Inactive Type:
 Recharge Identifier:

Location: Site/Off-Site Type Stlv1 Type Stlv1 Identifier Stlv2 Type Stlv2

Include Only Assets With Inactive Period Ending Between (MM/DD/YYYY) and (MM/DD/YYYY)

Asset User Fields:

Asset Initial Event:

Include Which of the Following?

- Only Asset Count by the Selected Break Group
- Asset Details (Steward, Custodian, User, Location, Inactive Type, Inactive Date...)
- Inactive Asset Comments
- Inactive Asset Initial Event Details
- Only Inactive Assets that are Available to Others
- Inactive Asset Unique Requirements
- Other Identifiers
- Closed Inactive Assets

Figure 4-21: Inactive Assets Report Parameters

INACTIVE ASSETS REPORT OUTPUT

Review the **Inactive Assets Report** output to determine if there are any inactive assets that are available for use. The following report reveals several inactive assets that are available for use.

Sunflower Enterprise ASIN6010		Inactive Assets				Page 2 of 4 05/22/2006 15:05	
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
I0101		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
I0103		TRAILER FOUNDATION	ACME PREFAB	T559PHY		\$ 9,900.00	01/01/1990
I0108		OSCILLOSCOPE	TEKTRONIX	T2204	443301	\$ 4,525.00	08/01/1996
I0201		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
I0203		TRAILER FOUNDATION	ACME PREFAB	T559PHY		\$ 9,900.00	01/01/1990
I0208		OSCILLOSCOPE	TEKTRONIX	T2204	443302	\$ 4,525.00	08/01/1996
I0301		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
I0303		TRAILER FOUNDATION	ACME PREFAB	T559PHY		\$ 9,900.00	01/01/1990
I0308		OSCILLOSCOPE	TEKTRONIX	T2204	443303	\$ 4,525.00	08/01/1996
I0401		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
I0403		TRAILER FOUNDATION	ACME PREFAB	T559PHY		\$ 9,900.00	01/01/1990
I0408		OSCILLOSCOPE	TEKTRONIX	T2204	443304	\$ 4,525.00	08/01/1996
I0501		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
I0503		TRAILER FOUNDATION	ACME PREFAB	T559PHY		\$ 9,900.00	01/01/1990
I0508		OSCILLOSCOPE	TEKTRONIX	T2204	443305	\$ 4,525.00	08/01/1996
I0601		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
I0603		TRAILER FOUNDATION	ACME PREFAB	T559PHY		\$ 9,900.00	01/01/1990
I0608		OSCILLOSCOPE	TEKTRONIX	T2204	443306	\$ 4,525.00	08/01/1996
I0701		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
I0703		TRAILER FOUNDATION	ACME PREFAB	T559PHY		\$ 9,900.00	01/01/1990
I0708		OSCILLOSCOPE	TEKTRONIX	T2204	443307	\$ 4,525.00	08/01/1996
I0801		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
I0803		TRAILER FOUNDATION	ACME PREFAB	T559PHY		\$ 9,900.00	01/01/1990
I0808		OSCILLOSCOPE	TEKTRONIX	T2204	443308	\$ 4,525.00	08/01/1996
I0901		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
I0903		TRAILER FOUNDATION	ACME PREFAB	T559PHY		\$ 9,900.00	01/01/1990
I0908		OSCILLOSCOPE	TEKTRONIX	T2204	443309	\$ 4,525.00	08/01/1996
I1001		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
I1003		TRAILER FOUNDATION	ACME PREFAB	T559PHY		\$ 9,900.00	01/01/1990
I1008		OSCILLOSCOPE	TEKTRONIX	T2204	443310	\$ 4,525.00	08/01/1996
IXX01		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990

Figure 4-22: Inactive Assets Report Output

There are several assets that are available for use while in storage.

RE-UTILIZE INACTIVE ASSETS

When an asset is available for use during its inactive period, or the appropriate custodian of the asset requests to redeploy the asset to active status, a request for redeployment is made to the organization handling inactive assets. This organization can then place the asset back in service.

SEARCH FOR INACTIVE ASSETS

You may find that another organization has inactivated an asset that you can utilize in your own organization. By using the **Asset Search** screen to find assets that have been designated as inactive, you can discover that rather than purchasing a new asset, you can utilize an existing asset.

Scenario: The following graphic illustrates how to use the **Asset Search** screen to discover excess assets that are available for reutilization.

NAVIGATION

- Click **Inactive**
- Click **Asset Search**

The screenshot shows the 'Asset Search' application window. The search criteria section includes fields for Manufacturer, Official Name, Serial Number, Asset Value, Model, Model Name, Minimum Acquisition Date, FSC, and Asset Type (set to OFFICE EQUIPMENT). Below the search criteria, there are checkboxes for Agreement Assets, Excess Assets (checked), Financial Assets, Inactive Assets, Inventory Assets, and Subset Assets. The main area displays a table of assets with columns for Identifier, Manufacturer, Model, and Official Name. A 'Report' button is located at the bottom of the table.

Assets Identifier	Manufacturer	Model	Official Name
EXC EX001	STEELCASE	DESK 6 FT	DESK 6 FT
EXC EX003	STEELCASE	DESK 6 FT	DESK 6 FT
EXC E0101	STEELCASE	DESK 6 FT	DESK 6 FT
EXC E0103	STEELCASE	DESK 6 FT	DESK 6 FT
EXC E0201	STEELCASE	DESK 6 FT	DESK 6 FT
EXC E0203	STEELCASE	DESK 6 FT	DESK 6 FT
EXC E0301	STEELCASE	DESK 6 FT	DESK 6 FT
EXC E0303	STEELCASE	DESK 6 FT	DESK 6 FT
EXC E0401	STEELCASE	DESK 6 FT	DESK 6 FT
EXC E0403	STEELCASE	DESK 6 FT	DESK 6 FT
EXC E0501	STEELCASE	DESK 6 FT	DESK 6 FT

Figure 4-23: Using Asset Search to Find Inactive Assets

Step 1. Navigate to the **Asset Search** screen.

The **Asset Search** screen is available from the Agreement, Management, Finance, Inactive and Excess modules.

Step 2. Check the **Inactive Asset** checkbox to limit your asset search to excess assets.

Step 3. Specify at least one criteria in the **Search Criteria** block. In this case, *Office Equipment* is the selection for the **Asset Type** criteria.

Step 4. Click the **Find** icon to return the results of your **Asset Search** criteria.

ASSET SEARCH REPORT

Alternatively, you can click the **Report** button to open up the **Asset Search** HTML based report. Enter your reporting criteria to return a report that can be setup as either a PDF or HTML output. Any selection criteria that you enter on this screen will be the default values in your HTML based report if you click the **Report** button after selecting your criteria.

Sunflower Enterprise ASMN6120		Asset Search				Page 2 of 4 05/22/2006 15:13	
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
INA IXX01		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
		Steward : SUNFLOWER SYSTEMS Custodian : DOE JOHN 050599 Phone : 555.1234 User : FRAZIER KRISTEN S 020866 Phone : 925.371.0136		Location : LIVERMORE BUILDING : E WHG : XX			
INA I0101		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
		Steward : SUNFLOWER SYSTEMS Custodian : DOE JOHN 050599 Phone : 555.1234 User : FRAZIER KRISTEN S 020866 Phone : 925.371.0136		Location : LIVERMORE BUILDING : E WHG : 01			
INA I0201		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
		Steward : SUNFLOWER SYSTEMS Custodian : DOE JOHN 050599 Phone : 555.1234 User : FRAZIER KRISTEN S 020866 Phone : 925.371.0136		Location : LIVERMORE BUILDING : E WHG : 02			
INA I0301		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
		Steward : SUNFLOWER SYSTEMS Custodian : DOE JOHN 050599 Phone : 555.1234 User : FRAZIER KRISTEN S 020866 Phone : 925.371.0136		Location : LIVERMORE BUILDING : E WHG : 03			
INA I0401		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
		Steward : SUNFLOWER SYSTEMS Custodian : DOE JOHN 050599 Phone : 555.1234 User : FRAZIER KRISTEN S 020866 Phone : 925.371.0136		Location : LIVERMORE BUILDING : E WHG : 04			
INA I0501		DESK 6 FT	STEELCASE	DESK 6 FT		\$ 800.00	01/01/1990
		Steward : SUNFLOWER SYSTEMS Custodian : DOE JOHN 050599 Phone : 555.1234 User : FRAZIER KRISTEN S 020866 Phone : 925.371.0136		Location : LIVERMORE BUILDING : E WHG : 05			

Figure 4-24: Asset Search PDF Report Output

REQUEST INACTIVE ASSET REDEPLOYMENT

Use the **Request Inactive Asset Redeployment** screen to redeploy an inactive inventory asset. Send a request for redeployment to the organization handling inactive assets when making an asset available for use during its inactive period or to redeploy an inactive asset to active status. After receiving a redeployment request, the property storage organization can place the asset back in service.

Scenario: The following graphic illustrates how to how to request that an inactive asset be redeployed. You want Inactive asset IXX01 to be placed back into service and delivered to your office.

NAVIGATION

- Click **Inactive**
- Click **Request Inactive Asset Redeployment**

Ok	△	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	IXX01	STEELCASE	DESK 6 FT	DESK 6 FT

Request No: 1103

Comment:

Message: Complete

Figure 4-25: The Request Inactive Asset Redeployment Screen

- Step 1.** Navigate to the **Request Inactive Asset Redeployment** screen.
- Step 2.** Specify the address for delivery of the asset that you want to redeploy by double-clicking in the **Location** field and entering the relevant information.
- Step 3.** Enter the asset identifier of the inactive asset that you want to redeploy in the **Identifier** field.
- Step 4.** Click the Tab key to populate **Manufacturer**, **Model**, and **Official Name**.
- Step 5.** Use the **Comment** text box to specify any special circumstances or delivery considerations.
- Step 6.** Click the **Save** icon to save your redeployment request. The system generates a redeployment **Request No** (Number).

WITHDRAW INACTIVE REDEPLOYMENT REQUESTS

If you have made a request to redeploy an asset and that asset cannot be placed back into service, you can withdraw your redeployment request. Use the **Withdraw Inactive Redeployment Request** screen to withdraw a request to re-use an inactive asset.

Scenario: The following graphic illustrates how to withdraw a redeployment request for asset IXX01. Use the request number (1103) from your original redeployment request.

NAVIGATION

- Click **Inactive**
- Click **Withdraw Inactive Redeployment Request**

Ok Request No	Identifier	Manufacturer	Model	Official Name
1103	INA IXX01	STEELCASE	DESK 6 FT	DESK 6 FT

Deliver-to Location: LIVERMORE__BUILDING__E__ROOM__XX

Comment:

Message:

Figure 4-26: The Withdraw Inactive Redeployment Request Screen

- Step 1.** Navigate to the **Withdraw Inactive Redeployment Request** screen.
- Step 2.** Enter the request number (**1103**) from the original inactive asset redeployment request.
- Step 3.** Click the Tab key to populate the screen.
- Step 4.** Click the **Save** icon to withdraw your request.

EXCESS INACTIVE ASSETS

When an asset reaches the end of its active life and is no longer useful, create an excess receipt request to dispose of that asset. Sunflower calls the process of removing an asset from your organization's physical and financial accountability **excess**. Proper and efficient disposal of excess material is an important and sensitive matter that can be subject to government regulations. The excess process includes the creation of **excess receipt request** to transition the active asset into an excess asset. The appropriate party or organization responsible for receiving, reviewing and acting upon requests can either deny, accept or withdraw a request. If accepted, the asset in question becomes an **excess asset**.

Once an asset is in excess, it may go through one or more **excess review cycles** depending upon the condition, type and other factors specified by your organization that will indicate the prioritization, duration and organizations to which the asset is available for review. The review cycle enables organizations to search for excess assets and if desired, redeploy these assets into their organization for reuse. The redeployment of excess assets is performed by creating an **excess asset reservation**. This process can remove the assets from the excess process and transition it back to an active status for the requesting organization. If an excess asset is not redeployed after a predetermined period of time (specified by your organization), the asset can be **retired**. While the excess process is not specific to inventory assets, the discussion provided in this section addresses the excess process and highlights the nuances of excessing inventory assets.

Excess receipt requests enable users who do not have the authority to directly create an excess asset to request an asset for disposal.

REQUEST INACTIVE ASSET EXCESS RECEIVAL

Recall that users can only work with assets that are a part of the organizations to which they belong to or that they are authorized to work with. An authorized user can create an excess receival request and a manager that oversees the disposal of assets can generate the excess assets from the receival request. After creating the request, the system can generate an E-mail to notify the requestor and other interested parties.

Scenario: The following graphic illustrates how to create an excess asset receival request for inactive assets. A request has been sent for a used but in good condition asset (I0102) to excess for potential redeployment. The asset should be picked up from its current location and sent to the excess storage facility.

NAVIGATION

- Click Excess
- Click Request Excess Receival
- Click Request Inactive Asset Excess Receival

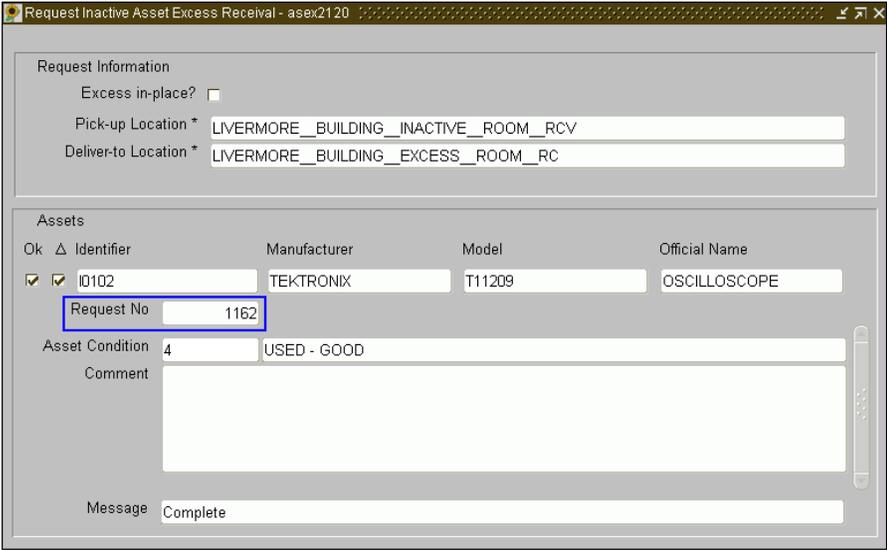


Figure 4-27: Requesting Inactive Asset Excess Receival

- Step 1.** Navigate to the **Request Inactive Asset Excess Receival** screen.
- Step 2.** Select the **Excess in-place?** checkbox if you want the asset to remain in its current location but in the Excess state. Selecting this option overrides the **Pick-up Location** and **Deliver-to Location** required fields.
- Step 3.** Specify the **Pick-up Location** of the asset that you want to excess by double-clicking in the **Location** field and entering the relevant information.
- Step 4.** Specify the **Deliver-to Location** of the asset that you want to excess by double-clicking in the **Location** field and entering the relevant information.
- Step 5.** Enter the asset identifier of the inventory asset that you want to excess in the **Identifier** field.
- Step 6.** Click the Tab key to populate **Manufacturer**, **Model**, and **Official Name**.
- Step 7.** Select the asset condition that best describes the asset's current state.
- Step 8.** Use the **Comment** text box to specify any special circumstances or delivery considerations.
- Step 9.** Click the **Save** icon to save your redeployment request. The system generates a redeployment **Request No** (Number).

WITHDRAW INVENTORY ASSET EXCESS RECEIVAL

If you have made a request to excess an asset and that asset can be placed back into service, you can withdraw your excess request.

Scenario: The following graphic illustrates how to use the **Withdraw Excess Receival Request** screen to withdraw a request to excess an inactive asset. Withdraw an excess receival request for the inactive asset I0102. Use the request number (1162).

NAVIGATION

- Click **Excess**
- Click **Withdraw Excess Receival Request**

Request No	Identifier	Manufacturer	Model	Official Name
1162	INA I0102	TEKTRONIX	T11209	OSCILLOSCOPE

Asset Condition: 4 USED - GOOD

Pick-up Location: LIVERMORE__BUILDING__INACTIVE__ROOM__RCV

Deliver-to Location: LIVERMORE__BUILDING__EXCESS__ROOM__RC

Comment:

Message:

Figure 4-28: Withdraw Excess Receival Request Screen

- Step 1.** Navigate to the **Withdraw Excess Receival Request** screen.
- Step 2.** Enter the request number (*1162*).
- Step 3.** Click the Tab key to populate the screen.
- Step 4.** Click the **Save** icon to withdraw your request.

RETIRE INACTIVE ASSETS

Retirement of assets, commonly referred to as disposal or excess, is the process used to remove property from an organization from a physical and financial accountability perspective. Proper and efficient disposal of excess material is an important and sensitive matter that can be subject to government regulations. In many cases, the first step towards retiring an asset is to create an excess request. The excess request signifies your intent to turn an inactive asset into an excess asset.

The following section describes the procedures used to initiate the excess process which includes details on how to:

- “Create an Inactive Asset Final Event” on page 375
- “Reverse Inactive Asset Final Events” on page 377

CREATE AN INACTIVE ASSET FINAL EVENT

While an Asset Center Representative (ACR) can initiate the disposal process by creating a receipt request, an ACR is not authorized to finalize an asset and remove accountability of that asset from an organization. The asset final event process is a function that only an Inactive Clerk or Inactive Manager can perform.

Scenario: The following graphic illustrates how to use the **Create Inactive Asset Final Events** screen to specify the final disposition of an asset. You want to send to excess the Inactive asset, I0101.

NAVIGATION

- Click **Inactive**
- Click **Create Inactive Asset Final Events**

Ok	Identifier	Manufacturer / Model / Official Name*
<input checked="" type="checkbox"/>	I0101	STEELCASE__DESK 6 FT__DESK 6 FT
<input type="checkbox"/>		

Figure 4-29: Create an Inactive Asset Final Event

- Step 1.** Navigate to the **Create Inactive Asset Final Events** screen.
- Step 2.** Specify the date of the asset final event. The current date is the default value.
- Step 3.** Select the event type from the list of values (LOV) from the **Asset Final Event** field for the inactive asset. In this case, the asset final event type is a transfer.
- Step 4.** Double-click in the **User Fields**, to open the **Organization** pop up window and the select the organization that you are transferring ownership of the asset. Save to close this window.
- Step 5.** Double-click in the **Document field**, to open the **Maintain Documents** screen and enter the related asset final event document information. Save to close this window.
- Step 6.** Enter the identifier of the excess asset and click the Tab key. The **Manufacturer**, **Model**, and **Official Name** populate.
- Step 7.** Click the **Save** icon to save changes to your asset reservation record.

REVERSE INACTIVE ASSET FINAL EVENTS

You can reinstate an excess asset at any time by reversing the final event. Alternatively, you can perform a reinstatement of the excess asset by entering its asset identifier and updating its status with the **Maintain Inactive Assets** screen.

Using the **Create Inactive Asset Final Events** screen.

- Step 1.** Navigate to the **Create Inactive Asset Final Events** screen.
- Step 2.** Specify the date of the asset final event. The current date is the default value.
- Step 3.** Select the event type from the list of values (LOV) from the **Asset Final Event** field for the inactive asset. In this case, the asset final event type is to Excess an inactive asset.
- Step 4.** Click the **Find** icon to search the database.
- Step 5.** Place cursor in the **Identifier** field for the asset that you want to reverse. In this case, excess asset *10101*.
- Step 6.** Click the **Remove Record** icon to remove the specifically indicated asset record.
- Step 7.** Click the **Save** icon to reinstate the selected asset.

NOTE: You can also reinstate a retired asset using the **Maintain Excess Assets** or **Maintain Inactive Asset** screen by entering the retired asset identifier in the **Identifier** field. A prompt message will inform you that this action will re-activate the asset, thereby reinstating the asset.

INACTIVE REPORTS

Sunflower provides a flexible and comprehensive web-based reporting system. The Sunflower database is queried when a report is created and executed. Reports display real-time information. Therefore, an afternoon report will differ from a morning report by reflecting any changes made during the day.

There are several output options available for your reports.

- PDF (Adobe Acrobat)
- HTML
- Text

Your outputs depend upon the report selected. Acrobat and HTML are standard options provided for most reports. Text file export is available for selected reports.

Sunflower provides the following reports to use with the Inactive module:

- **Inactive Assets (Global Information)** - shows detail and summary information of inactive assets.
- **Asset Search** - searches the asset repository for assets matching a description, manufacturer or model; used for asset review.
- **Asset Structure** - shows parent/child relationships between assets.
- **Assets with Pending Excess/Inactive Requests** - list assets with pending inactive/excess requests.
- **Excess/Inactive Receival Form** - prints a generic form, with barcode, that can be used for excess and inactive asset pick-up.
- **Inactive Asset Summary by Asset Flag** - summarizes inactive asset value and count by asset flag.
- **Inactive Asset Summary by Asset Type** - summarizes inactive asset value and count by asset type.
- **Inactive Asset Ongoing Events** - shows detailed information for ongoing events, e.g. maintenance, repairs and mileage captured, for inactive assets for a time period.
- **Inactive Asset Final Events** - shows the details of inactive asset final events, e.g. removed from storage, transferred to excess and abandonment.
- **Inactive Asset Interface Processing Results** - shows the results of processing the contents of interface table AS_LOAD_INACTIVE_ASSETS.
- **Inactive Asset Summary by Asset Flag** - summarizes inactive asset value and count by asset flag.
- **Inactive Asset Summary by Asset Type** - summarizes inactive asset value and count by asset type.
- **Inactive Asset Timeline** - report displays the event timeline of inactive assets over a time period.
- **Inactive Assets** - shows the details of inactive assets.
- **Purchase Order Aging Report** - shows detailed information of outstanding purchases orders requiring receipt and tagging of property.

NOTE: Many of the above reports are similar to those detailed in the Inventory Assets and Agreements Chapters. To see more detailed examples of the related reports, see Chapter 1, "Management Reports" on page 105 and Chapter 3, "Agreement Reports" on page 281.



INACTIVE REPORTS



EXCESS ASSETS

Excess is the process used to remove property from an organization and ultimately retire one or more assets. Proper and efficient disposal of excess material is an important and sensitive matter subject to federal regulations. The Excess module enables you to create, receive, and manage excess assets. The first step towards retiring an asset is to create an excess request. The excess request signifies your intent to turn an asset into an excess asset and formally dispose of the asset. This chapter discusses the many functions of the Excess module and how to dispose of assets and discharge capital and non-capital obligations.

KEY CONCEPTS

This chapter includes the following discussion points and concepts:

- “About Excess Assets”
- “Excess Roles”
- “Excess Setup”
- “Create Excess Assets”
- “Screen Assets”
- “Define Screening Periods”
- “Extend Excess Asset/Batch Review”
- “Manage Excess Asset Reservations”
- “Retire Excess Assets”
- “Excess Reports”

ABOUT EXCESS ASSETS

The Excess module is used to create and manage assets that are currently not in-use. The starting point for this chapter is to look at excess receipt requests through the use of reports and the process used to create excess assets from requests. Additionally, this section discusses how to manage assets awaiting disposal throughout the excess review cycle and the process for returning excess assets to in-service or dispose and retire excess assets.

EXCESS MODULE WORKFLOW

The excess module handles three primary functions: creation, management and disposal of assets. The workflow diagram below depicts this process based on the menu items found within the excess module that will help you to obtain your desired objective(s).

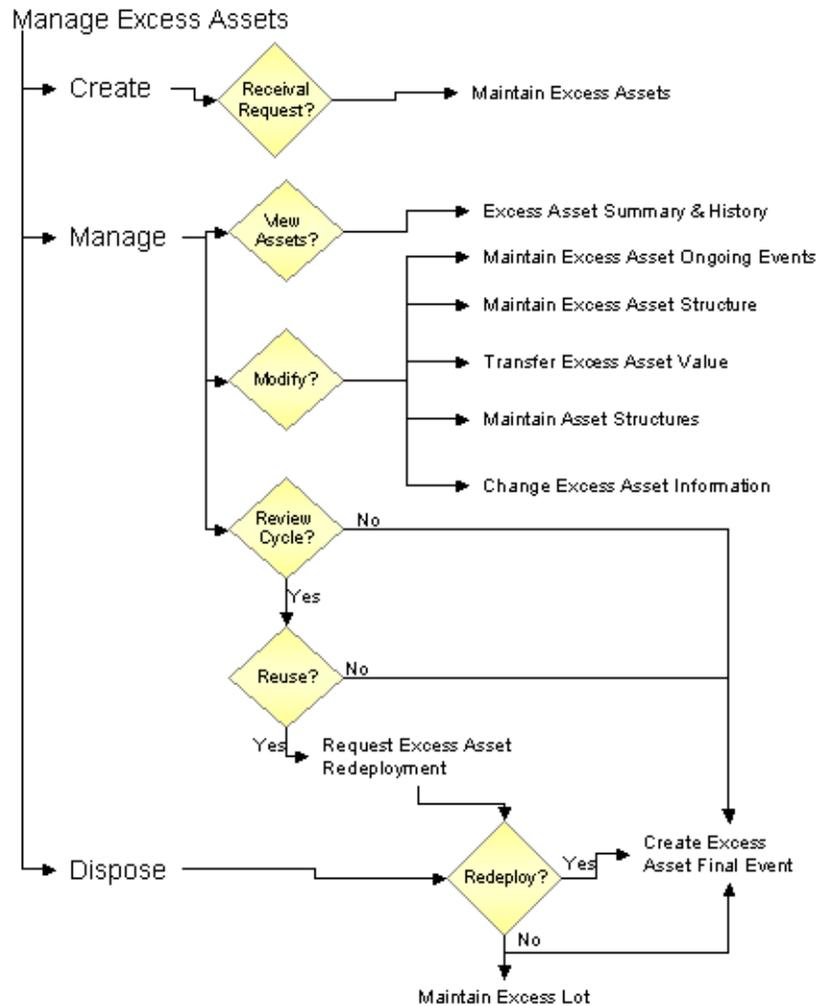


Figure 5-1: Excess Module Workflow

EXCESS ROLES

Depending upon your organizational structure you may find that in a small, or centralized, organization you may assign your users as Managers who are responsible for performing all or many of the tasks related to excess management. However, with larger, or decentralized, organizations you may choose to assign users who are responsible for the excess of assets one of the two applicable roles based on the types or number of excess assets for which they are responsible.

For example, you may choose to assign one user who is only responsible for specific excess assets, whether in quantity or type, a limited role (e.g. Excess Clerk) versus another user who has a greater level of responsibility and who manages all excess assets within the system (e.g. Excess Manager).

EXCESS MENU ACCESS

When assigning roles to users, it is important to map out the functional responsibilities of your users and then decided based on the tasks that each user must perform the appropriate role. Only then will you be able to assign the appropriate application role. The chart below lists role access to the menu items within the Excess module by the related Excess roles.

MENU ITEM	ROLE	
	EXCESS MANAGER	EXCESS CLERK
Maintain Excess Assets	Yes	Yes
Excess Asset Summary and History	Yes	Yes
Asset Search	Yes	Yes
Maintain Catalog Entries*	-	-
Change Excess Asset Information	Yes	Yes
Transfer Asset Value	Yes	Yes
Maintain Excess Asset Ongoing Events	Yes	Yes
Create Excess Asset Final Events	Yes	Yes
Edit Excess Asset Interface Records	Yes	Yes
Process Excess Asset Interface Records	Yes	Yes
Process Excess Asset PO Interface Records	Yes	Yes
Edit Asset Value Component Interface Records	Yes	Yes
Batch Excess Assets	Yes	Yes
Extend Excess Asset/Batch Review	Yes	--
Create Excess Asset Reservation	Yes	Yes
Maintain Excess Asset Reservations	Yes	Yes
Maintain Excess Review Requirements	Yes	--
Maintain Excess Review Rules	Yes	Yes
Maintain Excess Lot Masters	Yes	Yes
Maintain Excess Lots	Yes	Yes
Create Excess Lot Final Events	Yes	Yes
Request Excess Receival	Yes	Yes
Withdraw Excess Receival Request	Yes	Yes
Deny Excess Receival Request	Yes	Yes
Maintain Asset Structures	Yes	Yes
Excess Reports	Yes	Yes

*Excess Clerks and Managers have access to the **Maintain Catalog Entries** screen if you assign them the AS_CATALOGER role.

EXCESS MANAGER VS. EXCESS CLERK

What is the difference between the manager and clerk roles? You can tell from the table above that both roles have almost the exact same type of access within the Excess module. The difference between the two roles is only apparent when you take into account your organizational structure. The Excess Manger has access to and can manipulate (create, update, retire) excess assets throughout your organization. On the other hand, the Excess Clerk has just about the same capabilities as that of the Excess Manager but only for those organizations for which the clerk has an assigned responsibility.

EXCESS SETUP

Before you can use the Excess module, there are several setup steps that you must complete that include:

- “Define Excess Review Categories” on page 387
- “Define Asset Conditions” on page 389
- “Define Excess Review Rules” on page 391
- “Define Excess Review Types” on page 394
- “Define Excess Review Requirements” on page 396

DEFINE EXCESS REVIEW CATEGORIES

The first step to setting up the Excess module is to define the **Excess Review Categories**. You might think of it as splitting the stream of assets coming into the excess center into smaller streams based on certain rules. Assets that have little value may go directly to *Scrap* or *Salvage*. Assets that do have value may be screened for reuse, and then sold if no one (within the organization) wants them. There may be special governmental requirements for some assets (usually based on dollar value) to be listed on the federal GSA system (called EADS or FEDS) for a time before they may be disposed.

Scenario: The following graphic illustrates how to create several excess review categories.

NAVIGATION

- Click Admin
- Click Domains
- Click Maintain Domains

The screenshot shows a window titled 'Maintain Domains - saad0010'. It has two main sections: 'Domains' and 'Values'.

The 'Domains' section contains a 'Name' field with the text 'EXCESS REVIEW CATEGORY'.

The 'Values' section contains a table with the following data:

Id	Code	Description	Begin Date	End Date
50001016712	EXPEDITED	EXPEDITED		
50001016711	NON REP	NON REPORTABLE		
50001016710	REP	REPORTABLE		
50001016714	SCRAP	SCRAP/SALVAGE		
50001016713	SPECIAL	SPECIAL - NO SCREENING REQUIRED		
50001027377	NORMAL	NORMAL SCREENING		
50001027378	EADS	GSA EADS SCREENING		
50001027379	SCRAP	SCRAP OR SALVAGE		

Figure 5-2: Creating Excess Review Categories

Step 1. Navigate to the **Maintain Domains** screen.

Step 2. Click the **Find** icon and then click the **Next Record** icon until the value in the **Name** field displays *EXCESS REVIEW CATEGORY*.

Step 3. Create several **Excess Review Categories** as shown above.

Step 4. In this example, you are going to have three separate sub-streams.

- Assets that have value, but you are not required to post on the GSA system.
- Assets that have value and need to be listed at GSA before they may be disposed.
- Assets that have little value and will go directly to final disposition (will not be screened at all).

Step 5. Click the **Save** icon.

DEFINE ASSET CONDITIONS

Asset Conditions are used to describe the current state of an asset (e.g. new, used, salvage etc.). The asset conditions table is used as a LOV for one of the rules related to excess assets. The only asset condition that is defined from the factory is *UNKNOWN*.

Scenario: The following graphic illustrates how to create the asset conditions.

NAVIGATION

- Click Admin
- Click Domains
- Click Maintain Asset Conditions

Id	Code	Description	Rank	Begin Date	End Date
50001027380	UNK	UNKOWN	999		

Id	Code	Description	Rank	Begin Date	End Date
50001027380	UNK	UNKOWN	999		
	UNUSED	UNUSED	1		
	4	USED	4		
	7	REPAIRS REQUIRED	7		
	S	SALVAGE	10		
	X	SCRAP	11		

Figure 5-3: Defining Asset Conditions

- Step 1.** Navigate to **Maintain Asset Conditions** screen.
- Step 2.** Click the **Find** icon twice.
- Step 3.** Provide values for the **Code**, **Description** and **Rank** for each asset condition.
- Step 4.** Click the **Save** icon.

The most common codes in use by government today are shown in the above example. The **Rank** field is used to measure comparisons in the rule definitions, rather than the actual code. This allows numeric codes to be combined with alphanumeric ones, and still be able to specify ranges in the rules.

DEFINE EXCESS REVIEW RULES

Use the **Maintain Excess Review Rules** screen to create rules that define each asset review category required for your organization. Use standard criteria such as the minimum and maximum age, acquisition value, and condition to create your rules. Additionally, you can use **User Defined Fields** to add criteria specific to your organization's **Business Rules** and **Regulations**. Now, set up the rules for each of the **Excess Review Categories**.

Scenario: The following graphic illustrates how to define excess review rules for the review categories. Assume the federal government has mandated that any asset with an acquisition cost of \$5,000 or more must be listed on the GSA system for 60 days before it can be disposed. In addition, your organization is not interested in reusing any asset that is damaged, or cost less than \$100.

NAVIGATION

- Click **Excess**
- Click **Maintain Excess Review Rules**

Min Age Yrs	Max Age Yrs	Minimum Acquisition Value	Maximum Acquisition Value	Best Condition	Worst Condition	User Fields*
		\$5,000.00				

Figure 5-4: Defining Excess Review Rules

- Step 1.** Navigate to the **Maintain Excess Review Rules** screen.
- Step 2.** Click the **Find** icon twice.
- Step 3.** Click the **Next Record** icon until you reach the **GSA EADS SCREENING** category

Step 4. Enter a **Minimum Acquisition Value** of *\$5,000*.

Since this is a governmental requirement, it will not matter what condition the asset is in, or how old it is. All that matters is the original cost of the asset. Any asset with an Acquisition Cost of \$5,000 or more will end up in this sub-stream.

Step 5. Click the **Save** icon.

NAVIGATION

- Click **Excess**
- Click **Maintain Excess Review Rules**

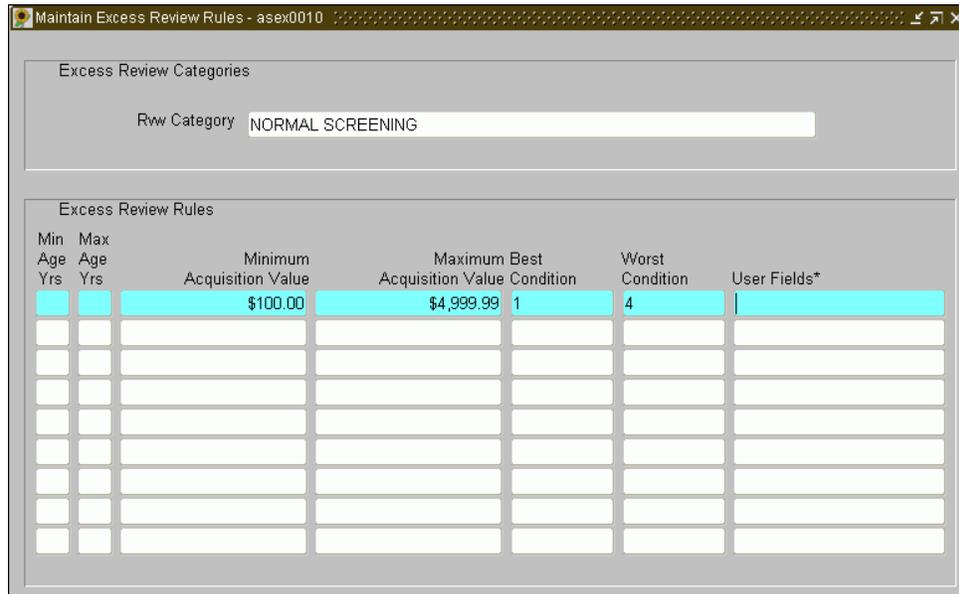


Figure 5-5: Defining Excess Review Rules continued

Step 6. Click the **Previous Block** icon, then the **Next Record** icon to navigate to the next **Excess Review Category**.

For this category, you are going to be a little more selective than the one for GSA. We have specified two conditions here on the same line. How this would read in English is as follows: Select any asset with an Acquisition Cost between \$100 and \$4,999.99, and an Asset Condition Rank between 1 and 4.

NOTE: Multiple rules entered on one line are treated as a Boolean “AND” condition, those on separate lines are treated as a Boolean “OR”.

Step 7. Click the **Save** icon.

NAVIGATION

- Click **Excess**
- Click **Maintain Excess Review Rules**

Min Age Yrs	Max Age Yrs	Minimum Acquisition Value	Maximum Acquisition Value	Best Condition	Worst Condition	User Fields*
		\$0.00	\$99.99			
				S	X	

Figure 5-6: Defining Excess Review Rules continued

Step 8 Click the **Previous Block** icon, then the **Next Record** icon until you reach the *Scrap* or *Salvage* review category.

For everything else that doesn't meet the other two categories, you are going to scrap. This means that you are not going to screen and try to reuse any such assets. They will go directly to final disposition, to be sold or junked.

Step 9 Specify the excess review rules as noted in the image above.

In the above example, the rule would read: Select any asset that has an Acquisition Cost of less than \$100, OR a Condition Code Rank between 7 and 11. (Remember that the Rank is what actually ends up getting used for a range compare, rather than the Code).

Step 10 Click the **Save** icon.

DEFINE EXCESS REVIEW TYPES

After defining excess asset sub-streams and their rules, you must define what happens to each stream. Begin by defining a code table. Generally, when an asset comes into the excess center that is suitable for reuse, an attempt is made to locate people who will be willing to claim and reuse the asset. Usually, priority is first given to those that would benefit the organization most, if an asset is reissued.

A typical scenario for a government organization is as follows:

The organization that actually purchased the asset is given first shot. Then other governmental organizations in a larger and larger scope, widening out like the layers of an onion. Each group involved is given a certain amount of time in which they may claim the asset exclusively, before including the next group. People in the higher priority groups can still claim assets when lower priority groups are included, but if they wait that long they will have to compete on an even basis with those groups. Reservations are automatically made on a first come, first served basis (individual reservation priorities can be adjusted, if necessary. But this has to be done manually).

Scenario: The following graphic illustrates how to create three excess review types to represent Internal, Local and Federal Government Agencies.

NAVIGATION

- Click Admin
- Click Maintain Domains

Maintain Domains - saad0010

Domains

Name: EXCESS REVIEW TYPE

Values

Id	Code	Description	Begin Date	End Date
50001016715	INTERNAL	INTERNAL		
50001027388	LOCAL	LOCAL GOVERNMENT AND SCHOOLS		
50001027389	EADS	ALL FEDERAL GOVERNMENT AGENCIES		
50001016719	LOC 01	LOCAL 01		
50001016720	LOC 02	LOCAL 02		
50001016721	LOC 03	LOCAL 03		
50001016722	LOC 04	LOCAL 04		
50001016723	LOC 05	LOCAL 05		
50001016724	LOC 06	LOCAL 06		

Figure 5-7: Creating Excess Review Types

- Step 1.** Navigate to the **Maintain Domains** screen.
- Step 2.** Click the **Find** icon once.
- Step 3.** Click the **Next Record** icon until the **Name** field displays, *EXCESS REVIEW TYPE*.
- Step 4.** Define the **Excess Review Types**.
- Step 5.** Click the **Save** icon.

DEFINE EXCESS REVIEW REQUIREMENTS

The next process for setting up the excess module is to define the screening periods that will occur for each **Excess Review Category** (sub-stream). This process enables you to specify which groups of people will have an opportunity to select and reuse assets in the excess process for a specified period of time. The definition that you create will allow the first group of people, internal to the owning organization, to have the first opportunity to reuse excess assets. This group will have 30 days in which they have exclusive access to new excess assets. After that initial screening period, access to these assets is opened up to local government and schools for another 30 days. After that screening period, if no one from either group has claimed the asset, it will be listed on the GSA system for 60 days. Use the **Maintain Excess Review Requirements** screen to define screening category types and to create or modify the duration of each *phase* of the screening period for a given category. Each phase is known as a **review type**.

Scenario: The following graphic illustrates how to define the screening periods for a set of review types.

NAVIGATION

- Click **Excess**
- Click **Maintain Excess Review Requirements**

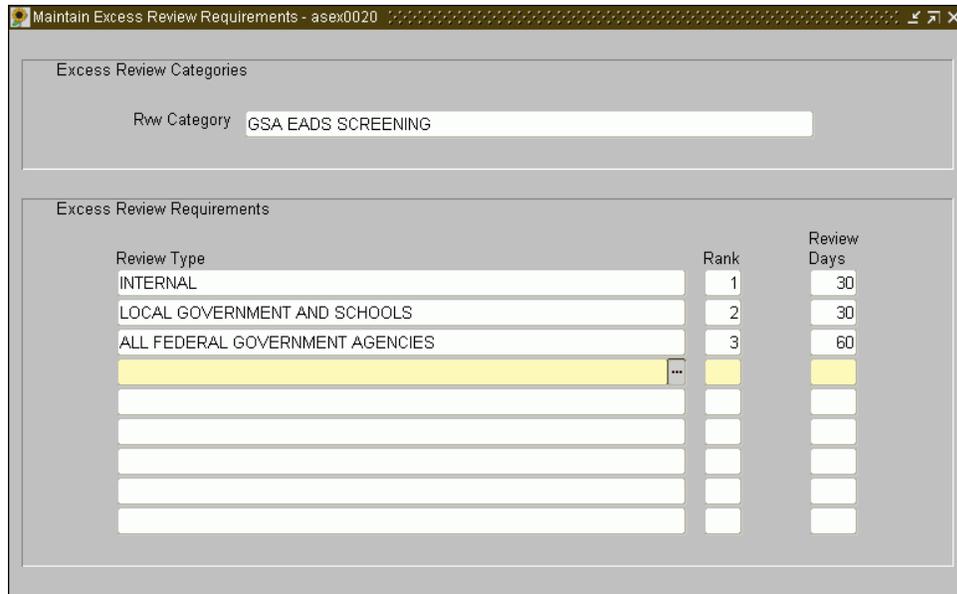


Figure 5-8: Defining Screening Periods

- Step 1.** Navigate to the **Maintain Excess Review Requirements** screen.
- Step 2.** Click the **Find** icon twice.
- Step 3.** Click the **Next Record** icon until the **Review Category** displays *GSA EADS SCREENING*.
- Step 4.** Add **Excess Review Types** for the review category.
- Step 5.** Click the **Save** icon.

If no one has claimed an asset for the entire length of time it has spent in the various screening periods (after 120 days in this case), then the asset will be available for public sale or disposal. We have done our best to reuse the asset, but now you still have to get rid of it (and recover whatever value you can from it, if possible).

NAVIGATION

- Click **Excess**
- Click **Maintain Excess Review Requirements**

The screenshot shows a software window titled "Maintain Excess Review Requirements - asex0020". It contains two main sections:

- Excess Review Categories:** A text field labeled "Rvw Category" with the value "NORMAL SCREENING".
- Excess Review Requirements:** A table with three columns: "Review Type", "Rank", and "Review Days".

Review Type	Rank	Review Days
INTERNAL	1	30
LOCAL GOVERNMENT AND SCHOOLS	2	30
[Empty]	[Empty]	[Empty]

Figure 5-9: Defining Screening Periods continued

- Step 6.** Click the **Previous Block** icon and then click the **Next Record** icon until the **Review Category** displays *NORMAL SCREENING*.
- Step 7.** Add **Excess Review Types** for the *NORMAL SCREENING* category, as shown above.
- Step 8.** Click the **Save** icon.

It is possible for two or more screening periods to run concurrently. This may be done by simply assigning them the same **Rank** number. An asset will be considered to be in both screening periods at the same time, when it is at that point in its excess processing.

Step 9 Click the **Previous Block** icon and then click the **Next Record** icon until the **Review Category** displays **SCRAP/SALVAGE**.

In this case, you are not going to define *any* screening periods for this category. This means that excess assets falling into this sub-stream will not have any screening time. They will immediately be available for final disposition, as soon as they start down the excess path. If you remember the rules for this category, this is the category of items that has an acquisition cost of less than \$100, or damaged, or specifically marked as Scrap or Salvage.

NAVIGATION

- Click **Excess**
- Click **Maintain Excess Review Requirements**

The screenshot shows a window titled "Maintain Excess Review Requirements - asex0020". It contains two main sections:

- Excess Review Categories:** A section with a text input field labeled "Rvw Category" containing the text "SCRAP/SALVAGE".
- Excess Review Requirements:** A table with three columns: "Review Type", "Rank", and "Review Days". The first row is highlighted in cyan. The table is currently empty of data.

Review Type	Rank	Review Days

Figure 5-10: Defining Screening Periods continued

The excess environment is now set up and ready to be used for creating excess assets.

CREATE EXCESS ASSETS

An excess asset is any asset that you are preparing to remove (dispose of) from your organization. You will use the Excess menu to manage all asset disposal activities. The first step in the excess process is the creation of an excess asset. You can create excess assets in several ways, such as:

- **Create From Scratch**

Use the **Maintain Excess Assets** screen to create an excess asset from scratch. This is the same process as creating any other interest asset from scratch. This procedure will not be covered in this chapter since it has been discussed thoroughly in the Inventory Management chapter. For more information about creating assets from scratch, see Chapter 1, "Single Asset Creation" on page 8.

- **Create From Another Interest Asset**

You can receive assets into excess that have already been entered into Sunflower Assets; this is likely to be the most common method that you will use in order to create excess assets from inventory, or other asset types, within the system. For more information see "Create Excess Assets From Other Interest Assets" on page 401.

- **Create From An Excess Receival Request**

Another common method used to create excess assets is the creation of an excess asset from an excess receival request. Assets can be received into excess directly from a request entered by a user who does not have the direct ability to create an excess asset. For more information see "Create Excess Assets From Receival Requests" on page 408. Recall that you created excess receival requests for both an Inventory asset Chapter 1, "Request Inventory Asset Excess Receival" on page 78 and an Inactive asset (Chapter 4, "Accept Inactive Receival Requests" on page 326).

CREATE EXCESS ASSETS FROM OTHER INTEREST ASSETS

Use the **Maintain Excess Assets** screen to create excess assets directly from another property record within the system. When you create an asset from another interest asset you have the option to rename the asset should you find this beneficial to your organization.

Renaming (or retagging) of the asset enables you to track the asset based on naming conventions that are specific to your organization versus that of another organization that may be, or may have been, responsible for the asset at a point in time during the assets lifecycle. For example, the excess department may have a certain set of naming conventions that it uses to track assets that are sent to them for disposal in comparison to the naming convention specified for the asset at its time of origination. Renaming an asset is optional and should be based upon your business processes and procedures. Renaming does not remove any other identifiers associated to the asset and as a result, each organization can continue to track an asset based on the naming convention by which they know the asset.

Scenario: The following graphic illustrates how to create an excess asset in order to begin the disposal process to discard an asset that is no longer needed by your organization. Inventory asset XX31 has been released to excess. Create an excess asset with an identifier of EXX31.

NAVIGATION

- Click **Excess**
- Click **Maintain Excess Assets**

The screenshot shows a software window titled "Maintain Excess Assets - asex2010 (Page 1 of 3)". The form is divided into several sections for data entry:

- Excess Assets Section:**
 - Excess Identifier: EXX31
 - Unique Name: (empty)
 - Default Location*: (empty)
 - Catalog Identifier*: 9
 - Manufacturer: TEKTRONIX
 - Official Name: OSCILLOSCOPE
 - Serial Number: XX
 - Initial Event: RECEIVE EXCESS ASSET
 - Asset Value*: \$4,750.00
 - Asset Condition: 4 USED - GOOD
 - Excess Lot: (empty)
 - Rw Category: (empty)
 - Manager: SUNFLOWER SYSTEMS
 - Steward: EXCESS CENTER
 - Custodian: 050598
 - User: (empty)
 - Location*: LIVERMORE_BUILDING_2000_ROOM_RCV
 - Document*: (empty)
 - User Fields*: (empty)
 - Global User Fields*: (empty)
- Existing Interest Asset Section:**
 - Type: INV
 - Identifier: XX31
 - Model: T11209
 - Acquisition Date: 01/01/1990
 - Effective Date: 05/26/2006
 - Responsibility Date: 01/01/1990
 - Expected Return Date: (empty)
 - Owner: SUNFLOWER SYSTEMS
 - Rep: (empty)
 - First: JOHN
 - Mid: (empty)
- Other Fields:**
 - Parents: 0
 - Children: 0
 - C/P/A: (empty)
 - Batch/Line: (empty)
 - Flags*: (empty)

At the bottom of the window, there are three buttons: "Page 2", "Cgmmmodity", and "Comment / Picture / Attachment".

Figure 5-11: Creating an Excess Asset From Another Interest Asset

- Step 1.** Navigate to the **Maintain Excess Assets** screen.
- Step 2.** Enter a new asset identifier in the **Identifier** field for the excess asset. In this case, the asset identifier is *EXX31*.
- Step 3.** Enter the type and ID of the existing asset in the **Existing Interest Asset Type** and **Identifier** field. In this case, the existing asset type is *INV* and the identifier is *EXX31*.
- Step 4.** Enter the asset's information accordingly. For more information, see Chapter 1, "Maintain Inventory Assets Field Terms" on page 10.
- Step 5.** Click the **Save** icon to create the "new" Excess Asset.

Unless you are an Excess Manager or Excess Clerk, you will not have the ability to directly create an excess asset as described in the prior section, "Create Excess Assets From Other Interest Assets" on page 401. As a result, it is likely that those individuals that want to dispose of assets will create a request to the Excess department/group in order to receive the desired assets into excess. Therefore, based upon your role within the organization when an asset is no longer useful, you will create a request for an excess asset, commonly called an Excess Receival Request. Later, when the asset has been disposed of or transferred out of your organization, the asset will be retired and any capital asset retirements will be reviewed and posted to your financial management system.

Excess receipt requests enable users who do not have the authority to directly create an excess asset to request an asset for disposal. Users can only work with assets that are a part of the organizations to which they belong or are responsible. In this manner, a user can create an excess receipt request to authorized personnel who can generate excess assets from the receipt requests. Excess receipt requests can be made for other interest assets (inventory, inactive etc.) property records to the excess group. The Excess group can in turn decide to accept or deny these requests.

Below is a sample of the **Excess Receipt Request** screen that individuals outside of the Excess group use to request the disposal of their assets.

NAVIGATION

- Click **Excess**
- Click **Request Excess Receipt**
- Click **Request Inactive Asset Excess Receipt**

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> IXX01	STEELCASE	DESK 6 FT	DESK 6 FT

Figure 5-12: Excess Receipt Request for an Inactive Asset

In the following section you will take a look at the report that you can use to view Excess Requests that are in the system and are awaiting approval by the Excess organization.

EXCESS RECEIVAL FORM

Use the **Excess Receival Form** report to view those assets for which excess requests have been created. Another useful report is the **Assets with Pending Excess Requests** report which provides summary information about newly created excess asset requests. The difference between the two reports is the level of detail each report provides.

The **Excess Receival Form** report provides a more detailed view where each excess request is displayed on a single page with details such as barcodes and signature lines, which are particularly useful when sending representatives into the field to pick up assets, especially where sign off is required (signature lines and other details are provided in the comments area). Also notice that this report contains the asset's barcode which can be very useful when using barcode scanning technology. The barcodes on the report allow you to use the report to scan the asset into excess using tools such as Sunflower ExcessTrak™.

The following reports can be used to view and manage excess receival requests:

- **Excess Receival Form** report
- **Assets with Pending Excess/Inactive Requests** report

EXCESS RECEIVAL FORM SAMPLE REPORT

Sunflower Enterprise ASMN6110	Excess Receival Form	05/26/2006 14:51
1004		
: : : 07/05/1998		
Identifier : INV 0131	Model : T11209	
Manufacturer : TEKTRONIX	Asset Type : LABORATORY EQUIPMENT	
Official Name : OSCILLOSCOPE	UoM :	
Quantity :	Value : \$ 4,750.00	
Description :	Acquisition Date : 01/01/1990	
Serial Number : 01	Owner : SUNFLOWER SYSTEMS	
Flags :	Rep :	
Manager : SUNFLOWER SYSTEMS	Phone : 925.371.0136	
Steward : SUNFLOWER SYSTEMS	Alternate Phone : 510.220.8432	
Custodian : FRAZIER TIMOTHY M 050167		
Asset Condition : USED - GOOD		
Pick-up Location LIVERMORE BUILDING : E ROOM : 220	Deliver-to Location LIVERMORE BUILDING : 2000 ROOM : RCV	
Comment :		
HAZARDOUS WASTE APPROVAL _____	DATE _____	
TRANSPORTATION APPROVAL _____	DATE _____	
ASSET CENTER REPRESENTATIVE APPROVAL _____	DATE _____	

Figure 5-13: Excess Receival Form

ASSETS WITH PENDING EXCESS/INACTIVE REQUESTS

The **Assets With Pending Excess/Inactive Requests** report provides similar information to the **Excess Receival Form** report, but in a summarized fashion. This report provides only the essential elements required to review the request for disposal.

Scenario: The following graphic illustrates how to use the guidelines on this page to generate the **Assets With Pending Excess/Inactive Requests** report.

Request No	Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value
1004	INV 0131		OSCILLOSCOPE	TEKTRONIX	T11209	01	\$ 4,750.00
Asset Condition : 4 USED - GOOD Steward : SUNFLOWER SYSTEMS Custodian : FRAZIER TIMOTHY M 050167 User : Pick-up Location : LIVERMORE BUILDING : E ROOM : 220 Request : EXCESS RECEIVAL Requester : OWNER REPOSITORY Requester Phone : Deliver-to Location : LIVERMORE BUILDING : 2000 ROOM : RCV - 07/05/1998							
1063	INV 0151		COMPUTER MINI	HEWLETT-PACKARD	9000	99701	\$ 3,900.00
Asset Condition : Steward : SUNFLOWER SYSTEMS Custodian : FRAZIER KRISTEN S 020966 User : Pick-up Location : LIVERMORE BUILDING : G ROOM : 200 Request : INACTIVE RECEIVAL Requester : OWNER REPOSITORY Requester Phone : Deliver-to Location : LIVERMORE BUILDING : INACTIVE ROOM : RCV - 09/21/1998							
1005	INV 0231		OSCILLOSCOPE	TEKTRONIX	T11209	02	\$ 4,750.00
Asset Condition : 4 USED - GOOD Steward : SUNFLOWER SYSTEMS Custodian : FRAZIER TIMOTHY M 050167 User : Pick-up Location : LIVERMORE BUILDING : E ROOM : 220 Request : EXCESS RECEIVAL Requester : OWNER REPOSITORY Requester Phone : Deliver-to Location : LIVERMORE BUILDING : 2000 ROOM : RCV - 07/05/1998							
1064	INV 0251		COMPUTER MINI	HEWLETT-PACKARD	9000	99702	\$ 3,900.00
Asset Condition : Steward : SUNFLOWER SYSTEMS Custodian : FRAZIER KRISTEN S 020966 User : Pick-up Location : LIVERMORE BUILDING : G ROOM : 200 Request : INACTIVE RECEIVAL Requester : OWNER REPOSITORY Requester Phone : Deliver-to Location : LIVERMORE BUILDING : INACTIVE ROOM : RCV - 09/21/1998							

Figure 5-14: Assets With Pending Excess/Inactive Requests Report

CREATE EXCESS ASSETS FROM RECEIVAL REQUESTS

Assets can be received into excess directly from a request entered by another user. Use the **Maintain Excess Assets** screen to create the excess asset from the receipt request by using the Asset Request Number (ASR). The ASR is a unique identifier that is system generated from excess (and inactive) receipt requests.

Scenario: The following graphic illustrates how to create an excess asset from the excess property request XSXX03.

NAVIGATION

- Click **Excess**
- Click **Maintain Excess Assets**

Figure 5-15: Creating Excess Assets

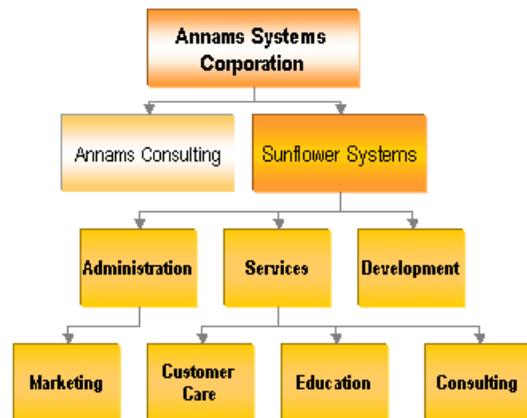
- Step 1.** Navigate to the **Maintain Excess Assets** screen.
- Step 2.** Enter a new identifier for the excess asset. **XSXX03**
- Step 3.** Enter **ASR** (asset request number) in the **Type** field of the asset to be excessed.
- Step 4.** Enter the ASR identifier (**1104**) in the **Existing Asset Identifier** field. Click the Tab key. The form autopopulates with data from the ASR.
- Step 5.** Click the **Save** icon to create the Excess Asset.

SCREEN ASSETS

Screening is an integral part of the excess process that enables you to inform internal and external organizations about excess assets that are available for reuse. Screening periods are generally categorized into two sections, internal and external screening. Internal screening is a period in which you give first priority to a designated organization or group of organizations (such as intra-organizational screening) while the external screening period enables you to offer assets that you intend to retire to a broader group of potential parties who may be interested in redeploying the asset for their own use. The types of assets and the extent and duration in which organizations have access to review excess assets will be defined by you, based on your Business Procedures and Policies.

For example:

The organization called Sunflower Assets has internal and external screening periods defined for excess assets as follows:



Internal Screening (within the organization)

Excess assets, with the exception of security equipment (e.g. computer equipment), could have a 10-day *internal departmental* screening period to determine whether the assets can be reutilized. Assets that are not considered security equipment will have a 10-day *departmental* screening period during which the assets will be made available to departments that roll up to Sunflower Assets (e.g. Marketing, Development, Consulting, etc.). The screening process will consist of posting available excess assets to a page on the Sunflower Assets intranet. If one of the organizations within Sunflower Assets is interested in a posted excess asset then the custodian of that organization will make a request to the excess department for that asset and arrange for receipt of the property. Once the asset is picked up or received by the requestor, the excess department will record the retirement of the excess asset.

If the asset is considered security equipment, then a diagnostic test is performed in order to validate whether the asset is in proper working order and any maintenance required for the asset is recorded using the **Maintain Ongoing Events** screen (see the events chapter of the Sunflower Enterprise Administration Guide). If the asset passes inspection, then the owning organization decides whether the asset can be reused internally (to its organization); if so, a transfer is initiated (see Chapter 1, "Transfer Assets" on page 45). If the asset does not pass inspection, or does pass inspection but is no longer needed, then the asset is submitted for external screening.

External Screening (“Government” organizations)

Externally, reportable and non-reportable assets are submitted to the General Services Administration (GSA) for up to 21 days unless an agency claims the asset before the end of the 21-day period. Once the screening period is over, the assets are taken out of GSA Excess and submitted for donation for a period of 5 days. If the assets are not donated, then GSA makes the assets available to the public for sale for a period of 21 days. Any proceeds of sold assets are documents and forwarded to the owning organization who then retires the asset with the appropriate final event type.

Sunflower Assets initiates the screening process by **batching** excess assets for review.

DEFINE SCREENING PERIODS

To use screening cycles that manage the disposal of excess assets, you need to perform the following:

- “Define Excess Review Rules” on page 391
- “Define Excess Review Requirements” on page 396
- “Batch Excess Assets” on page 411

BATCH EXCESS ASSETS

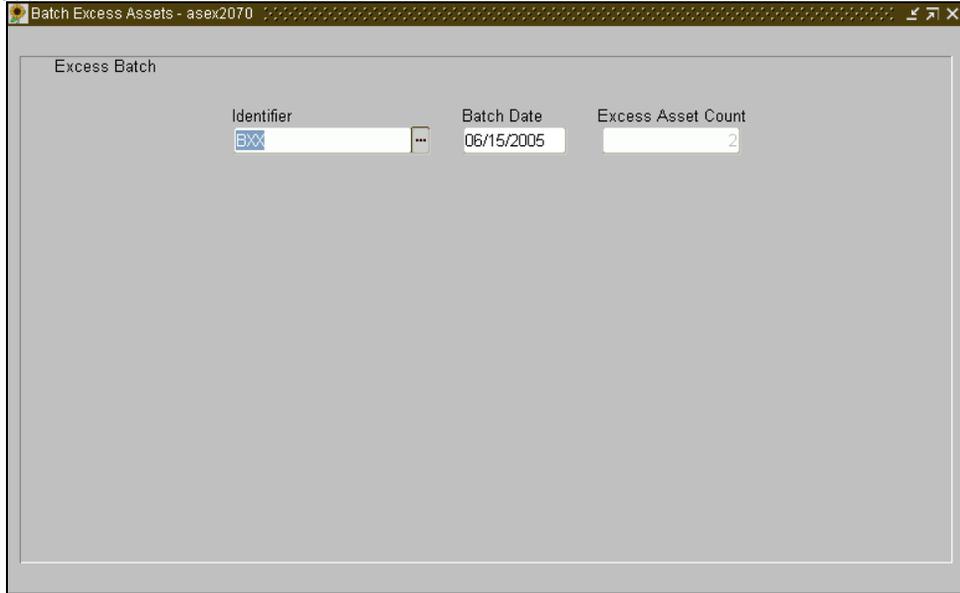
After creating excess assets, you need to batch these excess assets together. Batching does a number of things. It assigns a start time clock to each asset in the batch. Batching enables excess centers to move assets through the excess process with discrete time boundaries such as days or weeks. The batching process gives the excess staff control over the clock that moves the assets through their process. It will also automatically assign each asset to an Excess Review Category, based on the rules that have been defined.

Batching starts the excess asset screening process. The batching process evaluates excess assets according to review criteria; and then assigns a batch number, report number, and line number. Use the **Batch Excess Assets** screen to begin screening and group excess assets for tracking through the screening process. The batch number can be a combination of codes such as the Fiscal Year, the Julian date, and a number combination. Only excess assets that meet the rules defined with the **Maintain Excess Review Rules** screen are subject to screening.

Scenario: The following graphic illustrates how to use the Batch Excess Assets screen to begin the screening process.

NAVIGATION

- Click **Excess**
- Click **Batch Excess Assets**



The screenshot shows a web browser window titled "Batch Excess Assets - asex2070". The main content area is titled "Excess Batch" and contains three input fields: "Identifier" with the value "BXX", "Batch Date" with the value "06/15/2005", and "Excess Asset Count" with the value "2".

Figure 5-16: Creating a Batch ID

- Step 1.** Navigate to the **Batch Excess Assets** screen.
- Step 2.** Enter a batch identifier in the Identifier field and click the Tab key. (e.g. Fiscal Year + Julian Date + Sequence Number)
- Step 3.** **Batch Date** displays the date the batch was created.
- Step 4.** Click the **Save** icon to batch all assets that have not been batched to-date.

View the **Excess Asset Count** field to see how many excess assets were batched for screening.

Optionally use the **Excess Asset (Global Information)** report to view those assets that have completed the necessary screening cycles and are ready for disposal.

ADD EXCESS ASSETS TO AN EXISTING BATCH

You can add excess assets to an existing batch instead of creating a new batch.

Scenario: The following graphic illustrates how to add assets to an existing excess batch.

NAVIGATION

- Click **Excess**
- Click **Batch Excess Assets**

The screenshot shows a window titled "Batch Excess Assets - asex2070". Inside the window, there is a section titled "Excess Batch" containing three input fields: "Identifier" with the value "BATCH XX", "Batch Date" with the value "07/05/1998", and "Excess Asset Count" with the value "4". Below these fields is a checkbox labeled "Add assets to existing batch" which is checked.

Figure 5-17: Adding Assets to an Existing Batch

- Step 1.** Navigate to the **Batch Excess Assets** screen.
- Step 2.** With the cursor in the Identifier field, click the **List** icon and select the desired batch from the LOV.
Batch XX
- Step 3.** Check the **Add assets to existing batch** checkbox to add any new assets meeting the screening criteria to the existing batch.
- Step 4.** Click the **Save** icon to add any new assets that have not been batched to-date to the existing batch.

View the **Excess Asset Count** field to see how many additional excess assets were batched for screening.

MANAGE EXCESS ASSET RESERVATIONS

Your screening process may consist of posting the list of excess assets to an internal website, Email the information to a distribution list, or requesting that users generate reports (e.g. **Excess Asset (Global Information)** report) to view the list of available assets. During the internal screening process, if an organization wants one of the posted excess assets then the requesting department will make a request to the department handling excess assets to make the appropriate arrangements. This request is known as an **Excess Asset Reservation**.

Scenario: The following graphic illustrates how to create a reservation for excess assets.

NAVIGATION

- Click **Excess**
- Click **Create Excess Asset Reservation**

The screenshot shows a window titled "Create Excess Asset Reservation - asex2020". It is divided into two main sections: "Asset Reservations" and "Assets".

Asset Reservations section contains the following fields:

- Date: 06/15/2005 01:22:57
- Reserved by: MANAGER TRAINER EXCESS X EXXX
- Organization: ASSET CENTER XX
- Phone: 510.223.1221
- Duration: 21

Assets section contains a table with the following columns: Ok, Identifier, Manufacturer, Model, and Official Name.

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	EXX06	TEKTRONIX	T11209	OSCILLOSCOPE
<input type="checkbox"/>				

At the bottom of the window, there is a "Message" field containing the text "Complete".

Figure 5-19: Creating an Excess Asset Reservation

Step 1. Navigate to the **Create Excess Asset Reservations** screen.

Step 2. The following fields autopopulate with:

- Current date and time, **Date**
- Your userid based upon your login, **Reserved by**
- Your phone number, **Phone**
- Your asset center, **Organization**

Step 3. Enter the amount of time (days) for the reservation life span. *21*

Step 4. Enter an identifier for the excess asset and click the Tab key. *EXX06*

The **Manufacturer**, **Model**, and **Official Name** autopopulate.

Step 5. Click the **Save** icon.

ADJUST AN EXCESS ASSET RESERVATION

Use the **Maintain Excess Asset Reservations** screen to update information pertaining to a reserved excess asset. Additionally, you can use this screen to cancel a reservation.

Scenario: The following graphic illustrates how to modify the asset reservation made in the previous exercise by extending the reservation window from 21 to 25 days.

NAVIGATION

- Click **Excess**
- Click **Maintain Excess Asset Reservations**

The screenshot shows a web application window titled "Maintain Excess Asset Reservations - asex2030". The main content area is titled "Asset Reservations" and contains a form with the following fields:

Identifier	EXX06	Model	T11209	Cancel	<input type="checkbox"/>
Manufacturer	TEKTRONIX	Model Name			
Official Name	OSCILLOSCOPE				
Datetime	06/15/2005 01:22:57				
Reserved By	MANAGER TRAINER EXCESS X EXXX	Phone	510.223.1221		
Organization	ASSET CENTER XX				
Start Date	06/15/2005 01:24:53	Stop Date		Duration	25
				Rank	1

Figure 5-20: Modifying an Excess Asset Reservation

- Step 1.** Navigate to the **Maintain Excess Asset Reservations** screen.
- Step 2.** Click the **Find** icon to enter the Query Mode.
- Step 3.** Enter search criteria. *EXXX06*
- Step 4.** Click the **Find** icon again to retrieve the requested data.
- Step 5.** Specify the number of days for the reservation to be valid. *25*
- Step 6.** Click the **Save** icon to save changes to your asset reservation record.

RETIRE EXCESS ASSETS

You can dispose of assets one at a time or together in lots. The lotting process requires two steps which includes the creation of a lot master to which you can add one or more lots of assets. The following section discusses how to perform the final phases of disposal and retire those assets by using each of the methods mentioned here.

Once an asset has been removed from service by sale, auction, donation, transfer, or other means, the asset is retired. Assets may be retired individually or in groups (lots). Key attributes such as the **Date** on which the asset was removed from service and **Retirement Type**, referred to as the **Event Type**, are required. If the asset is retired from the accountable organization and is transferred to another organization, you can specify the receiving organization, contact name, and phone number for the new person responsible for the asset.

The following section illustrates how to retire individual assets or assets that are part of a lot that require retirement.

CREATE LOT MASTERS

While you can retire assets one at a time, you can also dispose of assets in groups, called lots. One or more lots are disposed of in **Lot Masters**. Lotting is particularly useful when you have assets that you are disposing of in bulk. For example, you can group all donated assets for retirement on a monthly basis. The first step is to create the lot master which defines the type (e.g. sale, auction, donation etc.) and valid dates for the organization responsible for the lot master and, secondly create a lot (or lots) to add to the lot master. After creating a lot, you need to add assets to that lot. Use the **Maintain Excess Lot Masters** screen to create or update one or more lot masters for auctions, sales, donations, scrap, etc.

Scenario: The following graphic illustrates how to go through the first phase of lotting by creating a Lot Master that will group excess assets into lots for an auction.

NAVIGATION

- Click **Excess**
- Click **Maintain Excess Lot Masters**

Type	Lot Master Identifier	Begin Date	End Date	Organization	User Fields*
AUCTION	AUCTION XX	06/15/2006	06/16/2006	ASSET CENTER XX	

Figure 5-21: Creating a Lot Master

Step 1. Navigate to the **Maintain Excess Lot Masters** screen.

Step 2. Enter the long name for the lot master type or select from the LOV in the **Type** field. *AUCTION*

- If you do not find the Lot Master Type that you are looking for from the LOV in the Type field, use the Administration module Maintain Domains screen to create the Lot Master Type.
- Select the Lot Master Type simple domain and insert a row for the desired Lot Master Type. For more information about creating simple domains, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.

Step 3. Enter an identifier for the lot master in the **Lot Master Identifier**. *AUCTIONXX*

Step 4. Enter first date that the lot master is valid for use in the **Begin Date** field.

Step 5. Enter last date that the lot master is valid for use in the **End Date** field.

Step 6. Enter the name of the organization who is sponsoring the auction in the **Organization** field.

Step 7. Click the **Save** icon to save your new **Lot Master**.

ADD LOTS TO LOT MASTERS

After creating a lot master, you can create lots for excess assets. Each lot is associated to a lot master. Once an asset is tied to a lot, the asset location is automatically updated for the lot's location.

Scenario: The following graphic illustrates how to create a lot, associate it to the lot master created in the previous exercise, and then add excessed asset **EXX09** to the lot.

NAVIGATION

- Click **Excess**
- Click **Maintain Excess Lots**

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	EXX09	COMPAQ	MODEL 1	COMPUTER PERSONAL
<input type="checkbox"/>				

Message Complete

Figure 5-22: Adding Assets to a Lot

- Step 1.** Navigate to the **Maintain Excess Lots** screen.
- Step 2.** Enter the identifier for the lot master in the **Lot Master Identifier** and click the Tab key. The **Lot Master Type** field auto-populates.
- Step 3.** Enter a lot identifier for the lot in the **Lot Identifier** field. You can use an identifier to describe the type of assets that are in the lot, (e.g. computers, trucks, desks, etc.)
- Step 4.** Select the location of the lot (assets).
- Step 5.** Enter the identifier for the excess assets.
- Step 6.** Click the **Save** icon to save the new lot.

RECORD AN EXCESS LOT FINAL EVENT

When a lot is disposed of, you will record a final event for the lot which, in turn, automatically creates a final event for each excess asset that is a part of the specified lot. For example, if a third party sold a lot of assets for your organization through an auction and they provide a receipt of sale, you can record the sale using the **Create Excess Lot Final Events** screen.

Scenario: The following graphic illustrates how to create a final event for LOT XX01 sold on MM/DD/YYYY with proceeds totalling \$500.

NAVIGATION

- Click **Excess**
- Click **Create Excess Lot Final Events**

The screenshot shows a software window titled "Create Excess Lot Final Events - asex2100". It is divided into two main sections: "Final Events" and "Excess Lots".

Final Events Section:

- Date: 06/15/2005
- Final Event: EXCESS SALE
- User Fields*: 500__ASSET CENTER XX
- Document*: SALE RECEIPT__XX-100

Excess Lots Section:

Ok	Lot Master Type	Lot Master Identifier	Lot Identifier
<input checked="" type="checkbox"/>	AUCTION	AUCTION XX	LOT XX01
<input type="checkbox"/>			

Message: Complete

Figure 5-23: Recording Excess Lot Final Events

- Step 1.** Navigate to the **Create Excess Lot Final Events** screen.
- Step 2.** Specify the date of sale (or other disposition) in the **Date** field.
- Step 3.** Specify the information in the **Final Events** and **Excess Lots** blocks accordingly.
- Step 4.** Click the **Save** icon to save the lot final event record.

CREATE EXCESS ASSET FINAL EVENT

When retiring individual assets (that have not been disposed of through a lot), use the **Create Excess Asset Final Events** screen to specify the final disposition of the assets.

Scenario: The following graphic illustrates how to retire asset EXX02, transferred today to the Department of Transportation, per the details of transfer document 55.

NAVIGATION

- Click **Excess**
- Click **Create Excess Asset Final Events**

Ok	Identifier	Manufacturer / Model / Official Name*
<input checked="" type="checkbox"/>	EXX02	HEWLETT-PACKARD_9000_COMPUTER MINI
<input type="checkbox"/>		

Figure 5-24: Retiring Individual Assets

- Step 1.** Navigate to the **Create Excess Asset Final Events** screen and enter the data provided by the table shown below.
- Step 2.** Specify the date of the asset final event. The current date is the default value.
- Step 3.** Select the event type from the list of values (LOV) from the **Asset Final Event** field for the inventory asset. In this case, the asset final event type is a *Excess Transfer*.
- Step 4.** Double-click in the **User Fields**, to open the **Organization** pop up window and the select the organization that you are transferring ownership of the asset. Save to close this window.
- Step 5.** Double-click in the **Document field**, to open the **Maintain Documents** screen and enter the related asset final event document information. Save to close this window.
- Step 6.** Enter the identifier of the excess asset and click the Tab key. The **Manufacturer**, **Model**, and **Official Name** populate. *EXX02*
- Step 7.** Click the **Save** icon to save the asset final event record.

NOTE: The **Generate DD149** button is only active if you have licensed Sunflower Contract Reports.

REVERSE AN EXCESS ASSETS FINAL EVENT

To reverse (reinstate) an excessed asset, reverse the excess final event. Alternately you can perform the same action by entering the asset identifier on the **Maintain Excess Assets** screen. For more information about reinstating retired assets, see Chapter 1, "Reverse Asset Final Events" on page 95.

NOTE: Reversing an excess asset in this manner removes the historical record of this asset final event. If you want to retain the asset final event history, reinstate the asset using the **Maintain Excess Assets** screen.

Scenario: The following graphic illustrates how to reverse the final event for excess asset EXX02.

NAVIGATION

- Click **Excess**
- Click **Create Excess Asset Final Events**

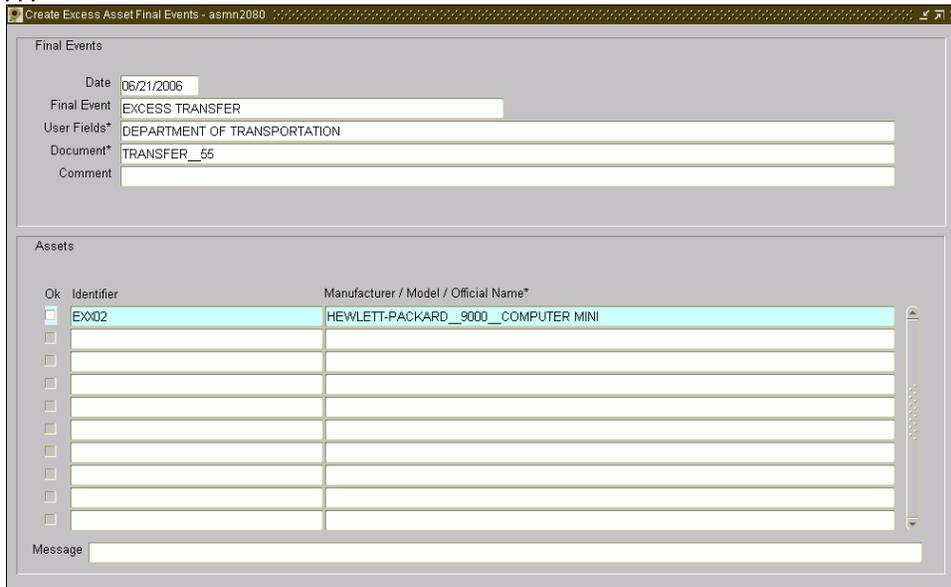


Figure 5-25: Reversing an Excess Asset Final Event

- Step 1.** Navigate to the **Create Excess Asset Final Events** screen.
- Step 2.** Specify the date of the asset final event. The current date is the default value.
- Step 3.** Select the event type from the list of values (LOV) from the **Asset Final Event** field for the inventory asset. In this case, the asset final event type is an *Excess Transfer*.
- Step 4.** Click the **Find** icon to search the database.
- Step 5.** Place cursor in the **Identifier** field for the asset that you want to reverse. In this case, excess asset *EXX02*.
- Step 6.** Click the **Remove Record** icon to remove the specifically indicated asset record.
- Step 7.** Click the **Save** icon to reinstate the selected asset.

NOTE: You can also reinstate a retired asset using the **Maintain Excess Assets** or **Maintain Inventory Asset** screen by entering the retired asset identifier in the **Identifier** field. A prompt message will inform you that this action will re-activate the asset, thereby reinstating the asset.

NOTE: If you try to review an excess asset with a final event from the **Maintain Excess Assets** or **Maintain Inventory Assets** screen, a prompt message will display indicating that this action will re-activate the asset, thereby reinstate the asset if you continue.

If you acknowledge the Warning Message and save, the asset final event is reversed and it displays on the **Asset Summary and History** screen.

EXCESS REPORTS

Sunflower provides a flexible and comprehensive web-based reporting system. The Sunflower database is queried when a report is created and executed. Reports display real-time information. Therefore, an afternoon report will differ from a morning report by reflecting any changes made during the day.

There are several output options available for your reports.

- PDF (Adobe Acrobat)
- HTML
- Text

Your outputs depend upon the report selected. Acrobat and HTML are standard options provided for most reports. Text file export is available for selected reports.

Sunflower provides the following reports to use with the Excess module:

- **Excess Assets (Global Information) Report** - shows detail and summary information of excess assets
- **Asset Reservations Report** - shows the details of excess assets with outstanding reservations
- **Asset Search Report** - searches the asset repository for assets matching a description, manufacturer or model; used for asset review
- **Asset Structure Report** - shows parent/child relationships between assets
- **Assets with Pending Excess/Inactive Requests Report** - list assets with pending inactive/excess requests
- **Excess Asset Summary by Asset Flag Report**- summarizes excess asset value and count by asset flag
- **Excess Asset Activity Summary by Asset Type Report**- shows the details of inactive asset activity by asset type
- **Excess Asset Final Events Report**- shows the details of excess asset final events
- **Excess Asset Initial Events Report**- shows the details of excess asset initial events, e.g. received and transferred
- **Excess Asset Ongoing Events Report**- shows detailed information for ongoing events, e.g. maintenance, repairs and mileage captured, for excess assets in a time period
- **Excess Asset Activity Summary by Asset Flag Report**- shows the details of excess asset activity grouped by asset flag
- **Excess Asset Summary by Asset Type Report**- summarizes excess asset value and count by asset type
- **Excess Asset Timeline** report displays the event timeline of excess assets over a time period.
- **Excess Assets Report** - shows the details of excess (disposal) assets
- **Excess Asset Interface Processing Results Report**- shows the results of processing the contents of interface table as_load_excess_assets
- **Excess Review Categories Report**- shows detail and summary information of excess assets
- **Excess/Inactive Receival Form Report** - prints a generic form, with barcode, that can be used for excess and inactive asset pick-up
- **Purchase Order Aging Report** - shows detailed information of outstanding purchases orders requiring receipt and tagging of property

NOTE: Many of the above reports are similar to those detailed in the Inventory Assets and Agreements Chapters. To see more detailed examples of the related reports, see Chapter 1, "Management Reports" on page 101 and Chapter 3, "Agreement Reports" on page 281.



MANAGE PHYSICAL INVENTORY

Conducting a physical inventory provides a defined process for accounting, reconciling, and updating your asset records. Based on your review cycles (e.g. annually, biannually, etc.), you will create a review campaign that defines how to conduct your physical inventory. The setup process of a review campaign is an important component of any physical inventory. This chapter discusses how to perform a physical inventory from setup to the close of an asset review cycle.

KEY CONCEPTS

This chapter includes the following discussion points and concepts:

- “About The Review Module”
- “Manage Review Campaigns”
- “Manage Resolutions”
- “Review (Physical Inventory) Reports”

ABOUT THE REVIEW MODULE

Sunflower enables you to manage and perform concurrent physical inventories. The physical inventory process begins by creating a review campaign. The review campaign defines the parameters within which you conduct your physical inventory. One of the first steps to conducting a review campaign is to define the baseline of your physical inventory. The baseline specifies the base level of assets that are to be accounted for within a review campaign. After defining the baseline criteria, freeze the baseline to establish the base of assets for your review. In addition, define the methods (e.g. MobileTrak barcode scanning, manual entry etc.) that you will use to locate and validate the assets that you find during the physical inventory process.

The Review (physical inventory) module enables you to record, track, and modify information about the assets within your organization that are a part of your general inventory. Some or all of the functionality provided within the Review module is available to users who have been assigned to one of the roles used to manage inventory (e.g. Review Manager or Review Clerk). This chapter discusses the many functions that you can accomplish by using the Review module.

REVIEW MODULE WORKFLOW

The Review module handles three primary functions: creation, management and closing of a physical inventory. The workflow diagram below depicts these functions based on the menu items found within the Review module.

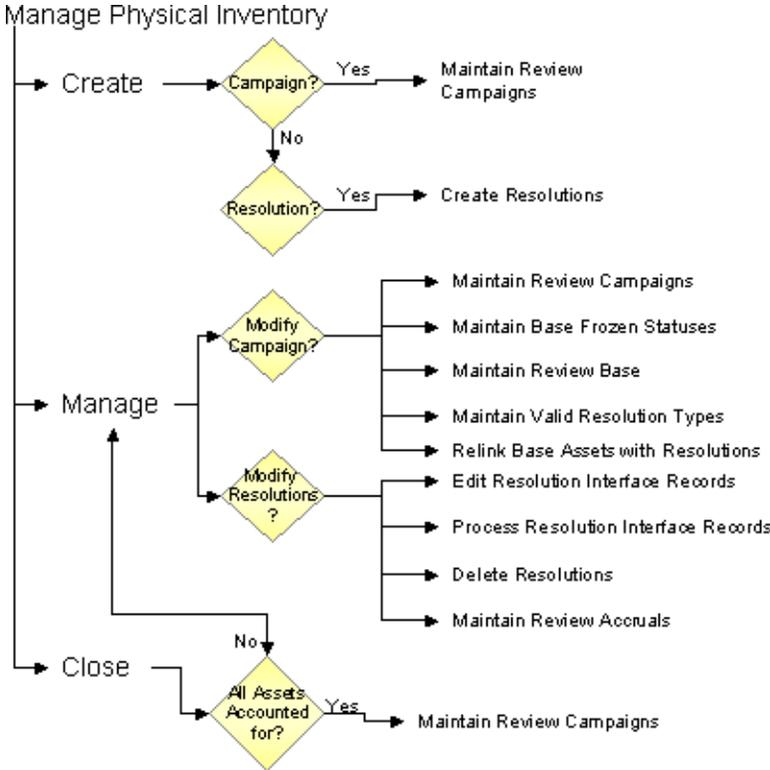


Figure 6-1: The Review Module Workflow

REVIEW CAMPAIGN LIFECYCLE

Sunflower provides the capacity to manage all aspects of the asset lifecycle. Managing your assets includes maintaining records for identification and location purposes, auditing and processing the disposal of surplus assets. Sunflower enables you to track an asset from the time it is acquired, until the time of its final disposal. Before an asset is disposed of, it is likely that it will be audited by numerous physical inventories. The physical inventory process consists of the following stages:

1. Define assets in a campaign
2. Freeze baseline
3. Define criteria for an asset find
4. Create resolutions
5. Review resolutions
6. Manage resolutions
7. Close review campaigns

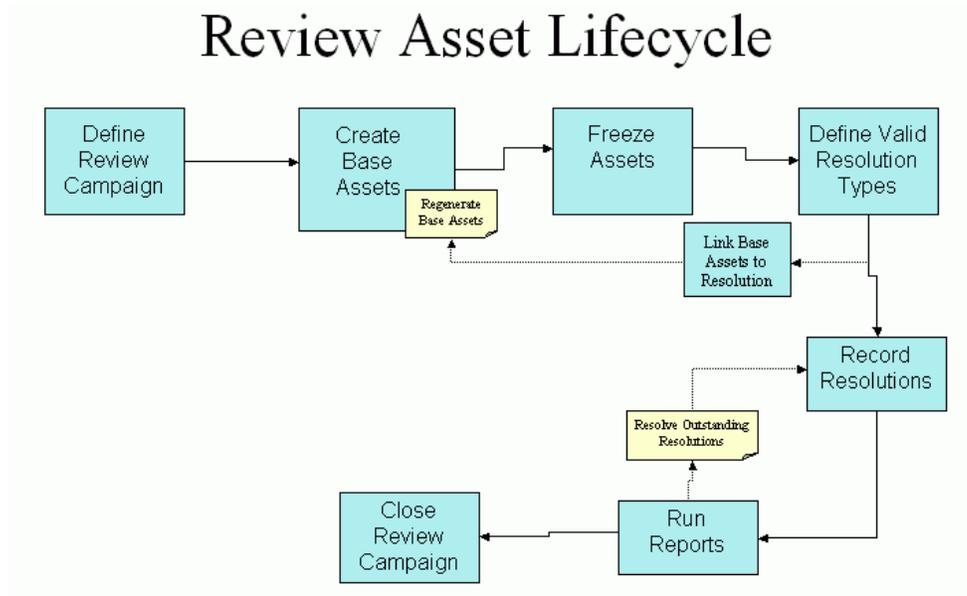


Figure 6-2: The Review Asset Lifecycle

REVIEW ROLES

Sunflower approaches asset management with the belief that you can manage, monitor, control, and account for an asset throughout its distinct lifecycle. Sunflower does not impose the way in which you have to manage your assets but provides guidelines, structures, processes, and tools to help you manage them effectively. The users that you assign to manage the various aspects of an asset at each stage of the lifecycle will depend upon your organizational structure and processes.

A Sunflower user is any individual to whom you assign one or more roles. The assignment of Sunflower roles enables users to perform job duties that are enabled by the specified role. Roles provide access to screens and define the extent to which an individual can perform functions such as adding, updating, and retiring asset records. The user in question may be an employee or a contractor working on the behalf of your organization who has a job function that requires either active (e.g. create, update or delete functions) or passive (e.g. general inquiry, searching and reporting) use of menu items in the Review module.

For more information about Sunflower application roles, see the Roles chapter in the Sunflower Enterprise User Guide.

REVIEW MENU ACCESS

The Review module uses two roles to manage review campaigns. These roles are the **Review Manager** and **Review Clerk**.

When assigning these roles to users, it is important to map out the functional responsibilities of your users and decide (based on the tasks that each user must perform) how to assign the appropriate application role. The table below lists menu access within the Review module based upon the Review roles.

MENU ITEM	ROLE	
	REVIEW MANAGER	REVIEW CLERK
Maintain Review Campaigns	Yes	--
Maintain Base Frozen Statuses	Yes	--
Maintain Valid Resolution Types	Yes	--
Maintain Review Base	Yes	--
Relink Base Assets with Resolutions	Yes	--
Edit Resolution Interface Records	Yes	Yes
Process Resolution Interface Records	Yes	Yes
Lookup Resolutions	Yes	Yes
Create Resolutions	Yes	Yes
Delete Resolutions	Yes	Yes
Maintain Review Accruals	Yes	Yes
Review Reports	Yes	Yes

REVIEW MANAGER VS. REVIEW CLERK

What is the difference between the manager and clerk roles? You can tell from the table above that there is a significant difference in the type of access provided for these roles within the Review module. The difference between the two roles is related to their functions as well as organizational structure. The Review Manager has access to and can edit (create, manage and close) the physical inventory process throughout an organization. On the other hand, the Review Clerk does not have creation capabilities and can only perform tasks related to the physical inventory process. Additionally, the Review Clerk can only perform management functions related to physical inventory for those departments to which the clerk has been assigned. The Sunflower Administrator must specify at what level within your organization a Review Clerk can work with your organization's assets by defining them as an Organization Contact. For more information about Organization Contacts, see the Roles chapter of the Sunflower Enterprise User Guide.

REVIEW MANAGER

The Review Manager has the ability to manage (e.g. create, modify, retire) all review campaigns within Sunflower. Additionally, the Review Manager is responsible for general administration tasks such as the definition and maintenance of list of values that support the Review module. Some of the tasks the Review Manager role can perform are as follows:

- Create Review Campaigns
- Define Valid Resolutions
- Define the Review Base

REVIEW CLERK

The Review Clerk does not have creation capabilities and can only perform tasks related to management of the physical inventory process. Additionally, the Review Clerk can only perform functions for those departments to which the clerk has been assigned as an Asset Center Representative (ACR). Some of the tasks the Review Clerk role can perform are as follows:

- Create Resolutions
- Lookup Resolutions
- Maintain Review Accruals

MANAGE REVIEW CAMPAIGNS

A review campaign, commonly referred to as a physical inventory, is made up of three components that determine the data involved (asset baseline), how inventory is accounted for (finds), and the duration of the campaign. The first phase of a physical inventory is to define the criteria for the review by creating a review campaign. A review campaign specifies the parameters of your physical inventory and includes such details as:

- Start Date
- End Date
- Review Campaign Type
- Determine Asset Baseline
- Sampling Type
- Transactions Types that (Validate and Resolve Assets)

This section discusses how to:

- “Create Review Campaigns” on page 441
- “Create Base Assets” on page 445
- “Freeze Base Assets” on page 453
- “Link Base Assets to Existing Resolutions” on page 455
- “Maintain Review Accruals” on page 457
- “Define Valid Resolution Types” on page 459
- “Create Resolutions” on page 462
- “Lookup Inventory Asset Resolutions” on page 464
- “Delete Resolutions” on page 466
- “Load Resolutions From an External Source” on page 468
- “Edit Resolution Interface Records” on page 469
- “Close Review Campaign” on page 472

CREATE REVIEW CAMPAIGNS

The cornerstone of the Review module is the review campaign and the creation of a review campaign is the first step in the definition of a physical inventory. A primary aspect of defining a review campaign is defining the assets that comprise the review campaign. Sunflower refers to this process as maintaining the review base. One of the first elements that you will need to define is the campaign type. The campaign type is usually defined based on the interest asset type such as Inventory Assets, Agreement Assets, Excess Assets, Inactive Assets etc. This enables you to limit your review campaign to a designated pool of assets that you are tracking in the Sunflower application database.

For example, if you are performing contract work for a government agency, you will likely need to comply with a request for an audit of assets in your possession that is supporting that contract. You can use Sunflower to create a review campaign based on the agreement types. You can target your review campaign by defining the rules (Base Source) to limit the selection of the asset baseline for your review campaign to include only those assets that support that specific contract. For more information about setting up rules for defining base assets, see “Create Base Assets” on page 445. The following section illustrates how to define a campaign, the first step in the review campaign process.

Scenario: The following graphic illustrates how to use the Maintain Review Campaigns screen to create a review campaign.

NAVIGATION

- Click Review
- Click Maintain Review Campaigns

Maintain Review Campaigns - asrv2010

Review Campaigns

Name: REVIEW CAMPAIGN 2 Frozen?

Sponsor: ASSET CENTER XX

Campaign Type: INVENTORY

Sample Type: POPULATION

Base Source: RULE GENERATED

Audit of: _____

Culminated by: _____

Begin Date: 07/01/1998 Expected End Date: _____ Actual End Date: _____

User Fields*: _____

Comment Freeze Status Resolutions

Figure 6-3: Maintaining Review Campaigns

Step 1. Navigate to the **Maintain Review Campaigns** screen.

Step 2. Enter the name of the review campaign in the **Name** field.

In this example, the review campaign name is *Review Campaign2*. This name should be distinct.

Step 3. Enter the name of the organization that is administering the campaign in the **Sponsor** field.

In this example, *ASSET CENTER XX*.

Step 4. Select the type of review campaign that you want to perform in the **Campaign Type** field.

- The **Campaign Type** is the asset interest type for the campaign you plan to perform (e.g. Inventory, Inactive etc.)
- The review campaign type is a classification that should be specific and meaningful to you.
- You define review campaigns with the Administration module's **Maintain Domains** screen. This is an activity that a Review Manager or Sunflower System Administrator role can perform.

Step 5. Select the sample type that you want to use to create the base (e.g. *Population*) in the **Sample Type** field.

- The **Sample Type** determines how to create the base. For example, a *Population* sample type includes all assets in baseline.
- Use *Random* sample to select a subset of the assets in the baseline.
- If the sample type is a *Random Sample*, then a pop-up window displays allowing you to specify the sample size and the number of assets to include in the sample.
- You define sample types with the Administration module's **Maintain Domains** screen.

Step 6. Select the base source method in the **Base Source** field.

- The **Base Source** establishes the method that you want to use when considering items for a review campaign. The selected method creates the list of assets that you audit.
- For example, selecting the *Rule Generated* base source implies that you will use a set of predefined rules to determine which assets are the subject of the review. The other base source types are:
 - **Campaign** - used to audit another campaign
 - **Direct File Load** - load a list of assets created from an external program
 - **User Created SQL** - if the rules do not meet the available choices, create your own SQL based rules.

Step 7. Enter the name of the previous review campaign in the **Audit of** field if this review campaign is an audit of a previous campaign.

- Click the **List** icon for a list of review campaigns.
- Select the name of a prior review campaign for which you are performing the audit. This is an optional field.

Step 8. Use the **Culminated by** field to specify whether the campaign definition that you are creating is validated against a prior campaign.

- Click the **List** icon for a list of review campaigns.
- The **Culminated by** field refers to the population campaign that you want to use to validate this campaign. Use this field with a sample type of a *Random Sample*.

Step 9. Enter the date that the review campaign begins in the **Begin Date** field.

Double-click in the field to display the calendar pop up screen.

Step 10. Enter the date that you expect the review campaign to end in the **Expected End Date** field.

Double-click in the field to display to display the calendar pop up screen.
This is an optional field.

- Step 11.** Enter the date the review campaign actually ends in the **Actual End Date** field.
- Double-click in the field to display the calendar pop up screen. This date freezes the results of the campaign.
 - Leave this field blank until you have completed the review cycle.
- Step 12.** The **Frozen?** field automatically populates when the review campaign is frozen.
- Step 13.** Enter user-defined values (if applicable) in the **User Fields** field. Double-click to edit this field.
- Step 14.** Define the acceptable resolutions for the review campaign by clicking the **Resolutions** button to display the **Maintain Resolution Types** screen.
- Enter the valid resolution types if applicable, then click the **Save** icon to return to the **Maintain Review Campaigns** screen.
- Step 15.** Click the **Comment** button at the bottom of the screen to display the **Capture Comments, Pictures, and Attachments** screen if you want to enter a comment for a review campaign.
- Add your comments, pictures or attach supporting documentation as needed.
 - Click the **Save** icon to return to the **Maintain Review Campaigns** screen.
- Step 16.** Click the **Save** icon to save your review campaign.

CREATE BASE ASSETS

After defining a campaign, you must specify the base (baseline) for the assets that you want to inventory. You must specify the baseline date. All inventory assets contained in a property management system as of the baseline date are subject to inventory review. Assets that become part of the property management system after the baseline date are not part of the inventory review baseline but are part of your organization's inventory. At any period in time, those assets (that are not part of your baseline) may be moved about freely to other locations. New assets can be recorded into the database, but they cannot be part of the baseline. The following illustration represents the inventory at any moment in time during a review campaign.

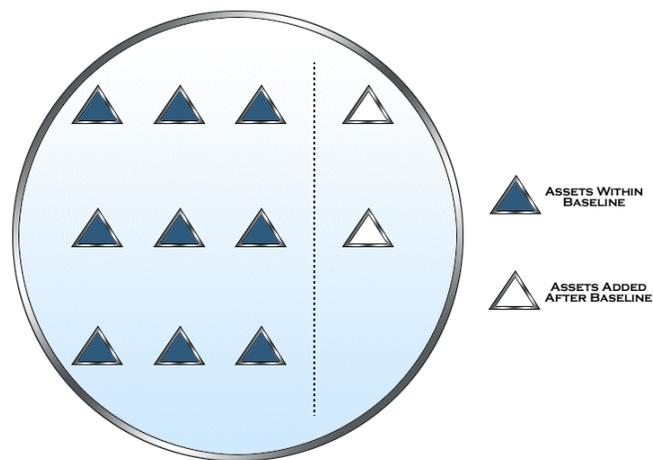


Figure 6-4: Baseline Assets and Assets Added After the Baseline Date

CREATION METHODS

You can use Sunflower to create the following **Base Source** rules.

- “Rule Based”
- “Campaign”
- “Direct File Load”
- “User Created SQL”

RULE BASED

Use a **Rule Based** base source when the assets that you want to include in your baseline can be selected using Sunflower attributes. A rule-generated campaign has a base that is generated from one or more English-like rules that you provide to describe the assets that should make up the baseline. A series of rules can be created to select assets. Each base rule detail criteria represents an **AND** condition and multiple base rules represent an **OR** condition. A rule can have an unlimited number of criteria and a campaign can have an unlimited number of rules. The following table lists all of the attributes that you can select from to generate a rule based asset base for a review campaign:

RULE BASED ATTRIBUTES FOR CREATING AN ASSET BASE	
ACQUISITION DATE	INACTIVE ASSET START DATE
ACTIVITY STATUS	INACTIVE TYPE
ACTIVITY TYPE	INTEREST ASSET TYPE
AGREEMENT	INVENTORY ASSET START DATE
AGREEMENT ASSET START DATE	LEVEL 1 STRUCTURE
AGREEMENT TYPE	LEVEL 2 STRUCTURE
ASSET SUB TYPE	MANAGER
ASSET TYPE	MANUFACTURER
ASSET VALUE	MODEL
CONDITION	OFF SITE LOCATION TYPE
CUSTODIAN	OFFICIAL NAME
EXCESS ASSET START DATE	OWNER
FINANCIAL ASSET START DATE	SITE
FINANCIAL CARRIER	STEWARD
FLAG	SUBSET
FSC CLASS	SUBSET ASSET START DATE
FSC GROUP	SUBSET TYPE
FSC NATIONAL STOCK NUMBER	USER

CAMPAIGN

Use the **Campaign** base source when you want to audit the results of a previous review campaign. Sunflower can create a base by random sampling the base of a prior campaign. In other words, the **Campaign** base source creates a subset of base assets from a previous campaign's baseline. This feature can be used to verify the results of a closed campaign.

NOTE: The sample type selection to support this base source rule must be **Random Sample**.

DIRECT FILE LOAD

Use the **Direct File Load** base source when using an external program to select the base assets for your review campaign. For example, if you use a statistical sampling algorithm program to determine the review campaign's base, you can load the file created from this process with the **Direct File Load** base source process.

The following steps are required to use the **Direct File Load** base source type:

- Step 1.** Produce a file from an external source (e.g. extract from Microsoft Excel, SASS etc.).
- Step 2.** Load data from the external source into the **AS_LOAD_BASE_ASSETS** table with the **Process Resolutions Interface Records** screen.

Required fields for this table load are:

- *BSAS_INTEREST_ENTITY_NAME*
- *BSAS_INTEREST_IDENTIFIER*
- *SOURCE_LOAD_GROUP*
- *SOURCE_RECORD_GROUP*

- Step 3.** Select a Campaign (e.g. Inventory, Agreement, Inactive, Excess, etc.).
- Step 4.** Select a Sample Type (Population).
- Step 5.** Create the Asset Base.

USER CREATED SQL

It is possible to write your own query and have that query deliver the baseline for you. This is useful when your review base requirements are so complex that you must define your own query statement. To do this, Click the **Free** button of the **Base Rules** block to write your query statement as a SQL statement.

When the previous base source type rules do not create the desired criteria for selecting your review campaign asset base, you can create your own SQL based rule to capture the desired results. Here is an example of a SQL derived base source rule for a review campaign that selects inactive assets with a start date of 01/01/1990 or later.

```
SELECT AS_ASSETS.ID
FROM
    AS_ASSET_STATES,
    AS_ASSETS
WHERE
    EXISTS (SELECT 'x'
            FROM AS_INACTIVE_ASSETS INAS
            WHERE INAS.ASSET_ID = AS_ASSETS.ID
            AND INAS.START_DATETIME > TO_DATE('01/01/1990', 'MM/DD/YYYY')
            AND NVL(INAS.STOP_DATETIME, SYSDATE) <= SYSDATE)
AND
    AS_ASSETS.ASSET_STATE_ID_LAST = AS_ASSET_STATES.ID
```

SAMPLE TYPES

There are essentially two sample types to use for Sunflower review campaigns. One is the **Population** sample type and the other is **Random Sample**. The **Population** sample type includes all assets in the baseline and the **Random Sample** is used in conjunction with the **Campaign** base source rule to select a subset of the assets in a previous campaign's baseline. **Random Sample** is the sample type selected when auditing a previously conducted campaign and **Population** is a comprehensive asset base conducted for a complete physical inventory determined by the base source rules that you use to create a review campaign.

GENERATING A REVIEW BASE

Scenario: The following graphic illustrates how to use the **Maintain Review Base** screen to specify which assets to include in the baseline for your review campaign. In this example, six assets make up the asset base for the steward organization, Asset Center XX. Use the **Maintain Review Base** screen to specify the base source rule that you want to use to define the assets for the baseline of your physical inventory.

NAVIGATION

- Click **Review**
- Click **Maintain Review Base**

The screenshot shows the 'Maintain Review Base' window with the following details:

- Review Campaigns:** Name: XX 2005, Sponsor: ASSET CENTER XX, Sample Type: POPULATION, Base Source: RULE GENERATED. Buttons: 'Create Base' (highlighted with a blue box), 'Create SQL'.
- Base Rules:** Identifier: XX, Criteria button.
- Base Rule Details - Criteria:**

Attribute	Operator	Operand
STEWARD	=	ASSET CENTER XX
- Forms:** A pop-up window showing 'Base created : 6 items' and an 'OK' button.

Figure 6-5: Specifying an Asset Base

Step 1. Navigate to the **Maintain Review Base** screen.

Step 2. Enter the desired review campaign name of the review campaign in the **Name** field and click the **Find** icon.

- The other fields in the **Review Campaign** block automatically populate upon making your selection.
- If the **Base Source** of the review campaign is *Rule Generated* or *User Created SQL*, Sunflower displays additional blocks on the screen.
- To retrieve the base information for all review campaigns, place the cursor in the **Name** field and click the **Find** icon. Use the **Previous Record** and **Next Record** icons to navigate through the records.

Step 3. Enter the tracking number assigned to the base rule in the **Identifier** field of the **Base Rules** block.

If a base rule already exists for the review campaign, click the **Insert Record** icon to add a new base rule. You can enter multiple identifiers as required (e.g. XXA & XXB, the asset base will be the accumulated total of both entries).

For Rule Generated Review Bases:

Step 4. Enter the type of criteria you want to add in the **Attribute** field of the **Base Rule Details - Criteria** block.

Click the **Insert Record** icon to add a new base rule or click the **Criteria** button and use the **Base Rule Details - Criteria** block to select your criteria for the additional rule.

NOTE: All conditions for a single rule constitute an **AND** condition. Multiple rules (Identifiers) constitute an **OR** condition.

Step 5. Enter the relational operator that you want to use for the expression in the **Operator** field (e.g. =, >=, etc.).

Step 6. Enter the value that you want to use for the expression in the **Operand** field.

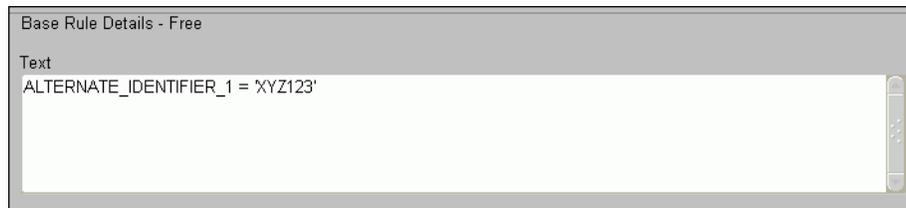
- The value selected in the attribute field determines the list of possible operands. For example, **STEWARD = ASSET CENTER XX** means that you are creating a review campaign for all assets assigned to the **ASSET CENTER XX** steward.
- Here is another example involving the two separate steward organizations. If you want to create an asset base for two separate steward organizations, you will need to create two sets of rules with separate identifiers in order to create an asset base that is inclusive of both organizations. If you use one identifier to create a rule attempting to capture the two organizations, the assets will need to belong to both steward organizations to be part of the asset base. Sunflower does not allow for two separate organizations to be steward organizations at the same time and therefore no asset base will be created without using two separate rules.

NOTE: The **Operand** phrase should not begin with “WHERE” or “AND.”

If the Sunflower attributes provided are not sufficient to define your asset base, click the **Free** button in the **Base Rules** block and enter a custom SQL phrase in the **Base Rules Details - Free Text** box.

Another option is to click the **Next Block** icon to open the same **Base Rules Details - Free Text** box. The SQL statement that you enter in the **Text** box is an addendum to the existing SQL script generated by the selected business rules. If you want to add another condition for an attribute that is not a part of the Rule Generated attribute set, then add the desired attribute in the **Base Rules Details - Free Text** box. The additional attribute will be added to the Rule Generated SQL script to further filter your desired asset base.

For example, Agreement assets can utilize the **Alternate Id 1** attribute to track assets. You can insert the condition, `ALTERNATE_IDENTIFIER_1 = 'XYZ123'`, in the **Base Rules Details - Free Text** box and click the **Create SQL** button to add the statement to the existing SQL. Click the **Next Block** icon to view the modified SQL statement in the **Base Creation Statements** block as illustrated below.

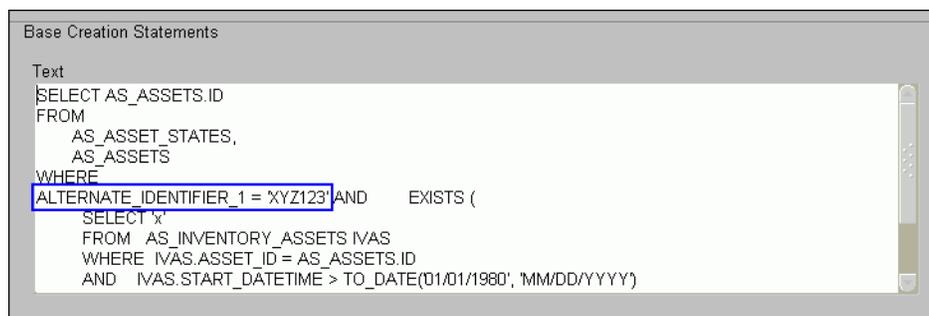


Base Rule Details - Free

Text

```
ALTERNATE_IDENTIFIER_1 = 'XYZ123'
```

Figure 6-6: Modifying Rule Generated SQL Scripts



Base Creation Statements

Text

```
SELECT AS_ASSETS.ID
FROM
  AS_ASSET_STATES,
  AS_ASSETS
WHERE
  ALTERNATE_IDENTIFIER_1 = 'XYZ123' AND EXISTS (
  SELECT 'x'
  FROM AS_INVENTORY_ASSETS IVAS
  WHERE IVAS.ASSET_ID = AS_ASSETS.ID
  AND IVAS.START_DATETIME > TO_DATE('01/01/1980', 'MM/DD/YYYY')
```

Figure 6-7: Viewing Modified Rule Generated SQL Scripts

For User Created SQL Review Bases:

Step 4. Enter the text of the SQL statement in the **Text** box field of the **Base Creation Statements** block.

NOTE: The select clause of the SQL statement you enter must return only the **AS_ASSETS.ID** column.

Step 5. Click the **Save** icon or the **Create SQL** button to save the SQL statement for the review base.

Step 6. Click the **Create Base** button.

Step 7. Click the **Save** icon to save the rules for the review base.

For Direct File Load Review Bases:

If the review campaign **Base Source** is *Direct File Load* or the **Sample Type** is *Random Sample*, Sunflower displays additional windows to capture the required information.

Step 4. Enter the value that identifies the review campaign's asset base in the **AS_LOAD_BASE_ASSETS** table in the **Source Load Group** field. Click the **List** icon for a list of source load groups.

Step 5. Click the **Create Base** button. Sunflower displays a dialog box with the number of base assets created.

Step 6. Click the **Save** icon to save the rules for the review base.

For Random Sample Review Bases:

Step 4. Enter the number of assets that you want to include in the asset base in the **Sample Size** field.

Step 5. Click the **Create Base** button. Sunflower displays a dialog box with the number of base assets created.

Step 6. Click the **Save** icon to save the rules for the review base.

If you want to view the SQL script that your base rule is creating, you can click the **Next Block** icon to cycle through to the screen to retrieve the **Base Creation Statements** block revealing the actual SQL script. This is a helpful tool for diagnostic tuning of SQL scripts before committing the script to create your asset base. Alternatively, you can view the SQL script that was used to create an asset base in the **AS_BASE_CREATION_STATEMENTS** table in the **TEXT** column.

FREEZE BASE ASSETS

After specifying the asset base for the review campaign, use the **Maintain Base Frozen Statuses** screen to freeze the asset base. Freezing the campaign prevents the set of base assets from changing (or asset creep) once the campaign has started. Additionally, this feature enables you to capture auditable campaign results. You cannot add or remove assets of a frozen asset base.

NOTE: Sunflower will not accept resolutions for a review campaign until its base is frozen.

Scenario: The following graphic illustrates how to use the **Maintain Base Frozen Statuses** screen to freeze the asset base.

NAVIGATION

- Click Review
- Click Maintain Base Frozen Statuses

Maintain Base Frozen Statuses - asrv2020

Review Campaigns

Name: REVIEW CAMPAIGN 2 Actual End Date:

Sponsor: ASSET CENTER XX

Base Frozen Statuses

Datetime	Frozen?	Comment Display (Text Only)
08/24/1998 11:05:25	<input checked="" type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>

Comment

Figure 6-6: Freezing the Asset Base

- Step 1.** Navigate to the **Maintain Base Frozen Statuses** screen.
- Step 2.** Enter the desired review campaign name in the **Name** field and click the **Find** icon to retrieve and freeze or unfreeze a specific review campaign's base.

The other fields in the **Review Campaigns** block automatically populate upon making your selection.

NOTE: To retrieve the base information for all review campaigns, place the cursor in the **Name** field and click the **Find** icon. Use the **Previous Record** and **Next Record** icons to navigate through the records.

- Step 3.** Specify whether to freeze or unfreeze the base. To freeze the base, enter **Y** in the **Frozen?** field. To unfreeze the base, enter **N** in the **Frozen?** field.

- Step 4.** Click the **Comment** button at the bottom of the screen to display the **Capture Comments, Pictures, and Attachments** screen if you want to enter a comment about freezing the asset base.

Add your comments, pictures or attach supporting documentation as needed. Click the **Save** icon to return to the **Maintain Base Frozen Statuses** screen.

- Step 5.** Click the **Save** icon to freeze or unfreeze the review campaign's base.

LINK BASE ASSETS TO EXISTING RESOLUTIONS

During the process of specifying a campaign, you may choose to change the parameters of the campaign (e.g. valid resolutions). Should you make changes or add new information to the criteria that specifies the valid resolution types for your campaign, you will need to re-align your frozen baseline with the campaign's valid resolution types. The **Relink Base Assets with Resolutions** screen enables you to relink base assets with resolutions after changing the valid resolution types for a campaign. You can also link new base assets with previously recorded resolutions. Use the **Relink Base Assets with Resolutions** screen to update your campaign.

Scenario: The following graphic illustrates how to use the **Relink Base Assets with Resolutions** screen to update your campaign.

NAVIGATION

- Click Review
- Click Relink Base Assets with Resolutions

Link	Name	Sponsor
<input checked="" type="checkbox"/>	INACTIVE REVIEW A	SUNFLOWER SYSTEMS
<input type="checkbox"/>	REVIEW CAMPAIGN 2	ASSET CENTER XX
<input type="checkbox"/>		

Figure 6-9: Relinking Base Assets with Resolutions

- Step 1.** Navigate to the **Relink Base Assets with Resolutions** screen.
- Step 2.** Enter the desired review campaign name in the **Name** field and click the **Find** icon to retrieve and freeze or unfreeze a specific review campaign's base. The other fields in the **Review Campaigns** block automatically populate upon making your selection.

NOTE: To retrieve the base information for all review campaigns, place the cursor in the **Name** field and click the **Find** icon. Use the **Previous Record** and **Next Record** icons to navigate through the records.

- Step 3.** Select the **Link** check box next to the review campaign that you need to relink with your modified resolutions.
- Step 4.** Click the **Save** icon to relink the base assets.

MAINTAIN REVIEW ACCRUALS

The **Maintain Review Accruals** screen enables you to record a previously lost asset found during a review campaign.

Scenario: The following graphic illustrates how to use the **Maintain Review Accruals** screen to record a previously lost asset found during a review campaign.

NAVIGATION

- Click **Review**
- Click **Maintain Review Accruals**

The screenshot shows a web application window titled "Maintain Review Accruals - asrv2140". The form is divided into three main sections:

- Assets:** Contains fields for Identifier (INVENTORY ASSET 0101), Manufacturer (APPLE), Official Name (COMPUTER PORTABLE), Model (M5555), and Model Name.
- Review Accruals:** Contains fields for Datetime (08/11/2005 14:11:14) and Location* (LIVERMORE__BUILDING__G__ROOM__222).
- Reportable on:** Contains a field for Review Campaign (REVIEW CAMPAIGN 1).

Figure 6-8: Record Asset Accruals

Step 1. Enter the interest asset type (Inventory, Excess, etc.) and the asset identifier in the **Type/Identifier** fields. Click the Tab key to display the asset's information.

The **Datetime** field automatically populates in the **Review Accruals** block.

Step 2. Double-click in the **Location** field to display the **Maintain Locations** screen and enter the location that asset was found. Click the **Save** icon to return to the **Maintain Review Accruals** screen.

Step 3. Enter the name of the review campaign on which the asset is reportable in the **Review Campaigns** field of the **Reportable on** block.

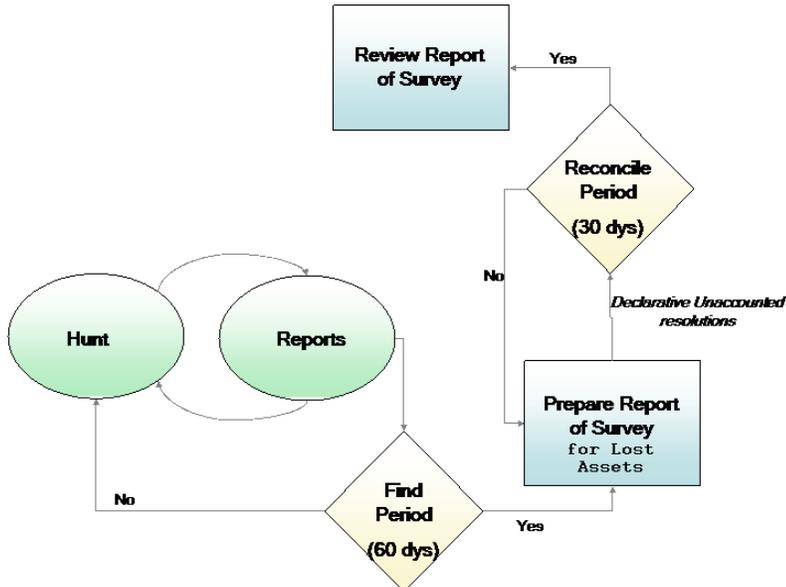
Step 4. Click the **Save** icon to save the accrual information.

MANAGE RESOLUTIONS

Use a combination of the Review module online screens and reports to manage the progress of your inventory. The following section discusses several useful screens and reports to help bring your campaign to a close.

RECORD RESOLUTIONS

Recording resolutions puts the campaign process into action. Affected users will be able to create and load resolutions during the review “find” period. At anytime during the process, the managing parties can use reports to view progress and escalate outstanding issues that arise during the report of survey.



There are several ways in which you can create resolutions.

Users that are a part of the physical inventory process can create resolutions for assets manually by entering the information online, through a Sunflower screen, through the use of Sunflower’s HTML Transaction web pages, or by using a barcode scanner to record resolutions.

To create a resolution online, use the **Create Asset Resolutions** screens to record resolutions for one or more assets at a time. You can create resolutions online for any of the interest asset types (e.g. Agreement, Inventory, Inactive, Financial, Inactive, Excess)

Each interest type has its own screen (e.g. Inventory Asset Resolutions). Within each screen you can select the type of resolution you wish to create such as:

- Online Physical
- Online Declarative
- Declared Unaccounted
- Confirmed Unaccounted

DEFINE VALID RESOLUTION TYPES

There are several different ways to capture an asset found during a review campaign. Each review campaign must specify the types of finds, or resolutions, that are acceptable for the assets in your review campaign base. There are six resolution types from which you can choose. The most conventional resolution method is to find the asset at a physical location and scan (**Barcode Scan**, or manually key (**Barcode Key**) in the asset's barcode using a barcode scanner. A **Declaration** is another resolution method used to declare assets that are lost or cannot be found. You can use a **Declared Unaccounted** resolution type to remove an open item from the reporting cycle while a **Confirmed Unaccounted** resolution type may be used to indicate that the asset is not in your possession because of an activity such as a transfer, repair, or maintenance.

Additionally, you can use the **Online Physical** resolution type for those assets that you cannot scan but you can see and attest to the location of where they exist. Conversely, you can use the **Online Declarative** resolution type for those assets that you cannot see but you know exist. In some cases, the assets may be inaccessible because it is located at an off-site location, has been loaned out, or is **Contractor Acquired Property**. In these situations, the only way that these assets may be accounted for is if a document is created attesting that your organization, or a contractor, has possession of the assets.

Use the **Maintain Valid Resolution Types** screen to define the types of finds, or resolutions, that are acceptable for the assets in your baseline. This screen enables you to select one or more applicable **Resolution Types** and the valid persons that can create resolutions against your campaign within a specified time frame. For example, you can define the valid resolution type for a given campaign to be a barcode scan by the steward or the custodian of an asset.

Scenario: The following graphic illustrates how to enter the accepted resolution types for your campaign. Each resolution type specifies the date, time, and who recorded the transaction.

NAVIGATION

- Click **Review**
- Click **Maintain Valid Resolution Types**

Resolution Type	Spon	Stew	Cust	User	Any	Rank	Sort	Begin Date	End Date
BARCODE SCAN	Y	Y	Y	Y	Y	1	1		
DECLARE UNACCOUNTED	Y	Y	N	N	N	3	3		
CONFIRMED UNACCOUNTED	Y	N	N	N	N	4	4		
ONLINE PHYSICAL	Y	Y	Y	N	N	6	6		
ONLINE DECLARATIVE	Y	Y	Y	N	N	7	7		
BARCODE KEY	Y	Y	Y	Y	Y	999	999		

Figure 6-8: Creating Valid Resolution Types

- Step 1.** Navigate to the **Maintain Valid Resolution Types** screen.
- Step 2.** Enter the desired review campaign name in the **Name** field and click the **Find** icon to retrieve and freeze or unfreeze a specific review campaign's base. The other fields in the **Review Campaigns** block automatically populate upon making your selection.

NOTE: To retrieve the base information for all review campaigns, place the cursor in the **Name** field and click the **Find** icon. Use the **Previous Record** and **Next Record** icons to navigate through the records.

Step 3. Enter the acceptable resolution types for the campaign in the **Resolution Type** field of the **Valid Resolution Types** block. Click the **List** icon for a list of resolution types.

NOTE: When using MobileTrak, select Barcode Scan, Barcode Key or both as valid resolution types.

Step 4. Enter a **Y** in the fields from whom the resolutions can be accepted, otherwise, enter an **N** in the **Accept from** fields.

The following are definitions of each of the fields:

- **Sponsor** - An asset center representative of the review campaign's sponsor.
- **Steward** - An asset center representative of the asset's steward.
- **Custodian** - The Custodian of the asset.
- **User** - The user of the asset.
- **Any** - Anyone.

Step 5. Enter the preference rank assigned to the resolution type for this campaign in the **Rank** field.

One (1) is the highest rank possible. This determines which find counts if found by more than one method or resolution type.

Step 6. Enter the sort order assigned to the resolution type in the **Sort** field.

The sort order determines the order that the resolution type is presented when reporting on assets found.

Step 7. Enter the first date the resolution type can be accepted in the **Begin Date** field.

Double-click in the field to open the calendar function window. If you do not want to restrict when you can accept the resolution type, leave this field blank. Begin and End Dates are optional. They can be used to sequence and overlap resolutions.

Step 8. Enter the last date the resolution type can be accepted in the **End Date** field.

Double-click in the field to open the calendar function window. If you do not want to restrict when you can accept the resolution type, leave this field blank. Begin and End Dates are optional. They can be used to sequence and overlap resolutions.

Step 9. Click the **Save** icon to save the resolution types for the review campaign.

CREATE RESOLUTIONS

The **Create Resolutions** screen enables you to record resolutions for an asset. You can also use this screen to declare or confirm for unaccounted assets. Recording resolutions for the assets participating in a review campaign helps your organization ensure that its assets are accounted for during a review campaign. You can create resolutions for the various interest assets that Sunflower supports (e.g. Agreement, Inventory, Finance, Inactive and Excess assets).

Scenario: The following graphic illustrates how to use the Create Resolutions screen to create resolutions for an inventory asset that is part of a review campaign.

NAVIGATION

- Click Review
- Click Create Resolutions
- Click Create Inventory Asset Resolutions

The screenshot shows a web application window titled "Create Inventory Asset Resolutions - asrv2120". The interface is divided into two main sections: "Resolutions" and "Assets".

Resolutions Section:

- Type:** ONLINE DECLARATIVE
- Justification:** (empty text box)
- Authorized By:** 44A409
- Last Name*:** ANDERSON
- First:** JOE
- Mid:** (empty text box)

Assets Section:

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	0102	DELL	D333	COMPUTER PERSONAL
<input type="checkbox"/>				

Below the table is a **Message** field (empty text box).

Figure 6-7: Creating Resolutions for an Inventory Asset

Step 1. Navigate to the **Create Inventory Asset Resolutions** screen.

Step 2. Enter the resolution type in the **Type** field of the **Resolutions** block.

- Sunflower displays additional fields depending on the resolution type that you chose.
- Click the **List** icon to display a list of possible resolution types.

Step 3. Enter the resolution information in the displayed fields.

Step 4. Enter the asset's identifier in the **Identifier** field of the **Assets** block. Click the Tab key and the asset information automatically populates.

By default, assets displayed in the **Assets** block have the delta check box checked, indicating that when you commit the record, a resolution will be created for the checked assets. If you do not want to create a resolution for a particular asset, uncheck the check box next to that respective asset.

NOTE: If you do not know the asset identifier, place your cursor in the **Identifier** field and click the **Find** icon to open the **Query Criteria** screen. Enter your criteria for the assets that you want to create a resolution. Click the **Execute** button to return the desired assets.

Step 5. Click the **Save** icon to create resolutions for the selected assets.

Sunflower checks the **Ok** check box next to those assets for which a resolution was successfully created. If a resolution could not be successfully created, Sunflower indicates the reason in the **Message** field.

If you made a request to create resolutions for multiple assets, the bottom of the screen indicates the number of assets for which the resolution was successfully created. For example, (*Transaction complete. Successfully saved 12 of 12 records*), indicating that a resolution for all twelve assets were successfully created.

LOOKUP INVENTORY ASSET RESOLUTIONS

Sunflower keeps a complete record of the resolutions recorded for each asset. You can review the resolutions for your assets at any time by using the **Lookup Resolutions** screen. The **Lookup Resolutions** screen enables you to review the resolutions recorded for an asset and determine if an asset has been reviewed on a campaign. This screen enables you to search on and review resolutions for one asset at a time.

Scenario: The following graphic illustrates how to lookup the asset resolutions that have been previously recorded for an inventory asset.

NAVIGATION

- Click Review
- Click Lookup Resolutions
- Click Lookup Inventory Asset Resolutions

Review Campaign	Begin Date	End Date
XX 2005	06/15/2005	
REVIEW CAMPAIGN 1	05/01/1998	

Figure 6-10: Looking Up Inventory Asset Resolutions

Step 1. Navigate to the **Lookup Inventory Asset Resolutions** screen.

Step 2. Enter the asset identifier in the **Identifier** field of the **Assets** block. Use the asset identifier to retrieve information about the resolution which includes:

- The type of resolution used to find the asset (e.g. barcode scan, online physical, declared accounted, etc.)
- The name of the campaign(s) to which the resolution is linked. There may be multiple resolutions for an asset.

NOTE: If you do not know the asset identifier, place your cursor in the **Identifier** field and click the **Find** icon to open the **Query Criteria** screen. Enter your criteria for the assets that you want to create a resolution. Click the **Execute** button to return the desired assets.

- The **Resolutions** block displays the resolution type and other information about the resolution.
- The **Review Campaigns** block displays review campaign information if the resolution is linked to a review campaign.

Step 3. With the cursor in the **Resolutions** block, use the **Previous Record** and **Next Record** icons to navigate through the resolutions.

DELETE RESOLUTIONS

Use the **Delete Resolutions** screen to remove a recorded resolutions at any point during the campaign cycle. This screen enables you to search on and delete resolutions for one asset at a time.

Scenario: The following graphic illustrates how to delete the asset resolutions that had been previously recorded.

NAVIGATION

- Click Review
- Click Delete Resolutions
- Click Delete Inactive Asset Resolutions

Assets		
Identifier	S10	
Manufacturer	TEKTRONIX	Model T11209
Official Name	OSCILLOSCOPE	Model Name

Resolutions	
Resolution Type	Datetime

Review Campaigns		
Review Campaign	Begin Date	End Date

Figure 6-11: Deleting Inventory Asset Resolutions

Step 1. Navigate to the **Delete Inventory Asset Resolutions** screen.

Step 2. Enter the asset identifier in the **Identifier** field of the **Assets** block.

NOTE: If you do not know the asset identifier, place your cursor in the **Identifier** field and click the **Find** icon to open the **Query Criteria** screen. Enter your criteria for the assets that you want to create a resolution. Click the **Execute** button to return the desired assets.

- The **Resolutions** block displays the resolution type and other information about the resolution.
- The **Review Campaigns** block displays review campaign information if the resolution is linked to a review campaign.

Step 3. With the cursor in the **Resolutions** block, use the **Previous Record** and **Next Record** icons to navigate to the resolutions that you want to delete.

Step 4. Click the **Delete** icon.

Step 5. Click the **Save** icon to delete the resolution.

LOAD RESOLUTIONS FROM AN EXTERNAL SOURCE

Use the **Process Load Resolutions** screen to mass load resolutions from any external source such as a barcode reader.

Scenario: The following graphic illustrates how to load resolutions from an external source.

NAVIGATION

- Click **Review**
- Click **Process Load Resolutions**

A screenshot of a web browser window titled "Process Agreement Asset Interface Records - asrv2130". The main content area is a light gray form with a label "Load Group" at the top left. In the center of the form, there is another "Load Group" label followed by a white rectangular input field.

Figure 6-12: Loading External Source Resolutions

- Step 1.** Navigate to the **Process Load Resolutions** screen.
- Step 2.** Enter the value that identifies the external source in the source **Load Group** field.
- Step 3.** Click the **Save** button to mass load the resolutions.

EDIT RESOLUTION INTERFACE RECORDS

Use the **Edit Resolution Interface Records** screen to move data from the **AS_LOAD_RESOLUTIONS** table to the **AS_RESOLUTIONS** table and to correct any errors that occur while attempting to load external based resolutions created with the **Process Load Resolutions** screen.

Scenario: The following graphic illustrates how to edit resolution interface records.

NAVIGATION

- Click **Review**
- Click **Edit Resolution Interface Records**

The screenshot shows a web application window titled "Edit Resolution Interface Records - asv0040". The interface includes a header with "Load Group" (BCR_XX), "Record Group" (3), and "Processed" (). Below the header are three tabs: "Resolution", "Off-Site Location", and "Document". The "Resolution" tab is active, displaying a form with the following fields:

Interest Entity	Prefix	Name	Identifier
Interest Asset Id		INVENTORY ASSET	XX01
Asset UID Id		Asset ID	Unit of Measure
Device Id		Asset Mark Id	
		Device Identifier	
Resolution Type Id	Code	Description	
Recorded by	020866	BARCODE SCAN	
Resolutions between	07/06/1998 13:34:00	Timezone	
Upd Loc?	Y		
Location		Code	Site LIVERMORE
Structure Level 1		Stlv1	E
Structure Level 1 Type		Code	Stlv1 Type BUILDING
Structure Level 2		Stlv2	200
Structure Level 2 Type		Code	Stlv2 Type ROOM
Structure Level 3			Mail Stop

Figure 6-13: Edit Resolution Interface Records

The **Edit Resolution Interface Records** screen displays the information that you entered using the **Process Load Resolutions** screen. This information may require validation and edits before the data can be moved from the **AS_LOAD_RESOLUTIONS** table to the **AS_RESOLUTIONS** table.

- Step 1.** Navigate to the Review module's **Edit Resolution Interface Records** screen.
- Step 2.** To retrieve a specific load group, click the **Find** icon, enter the desired load group, and click the **Find** icon again.
- Step 3.** To retrieve all the load groups, place the cursor in the **Load Group** field, press the **Execute Query** key (From the **Help** menu, choose **Keys** to see which key is assigned as the **Execute Query** key). Use the **Previous Record** and **Next Record** icons to navigate to the desired resolution.
- Step 4.** Click the **Save** icon to mass load the resolutions.

REVIEW AND CORRECT ERRORS IN THE INTERFACE TABLES

Upon saving, if an error occurs, then the data cannot be loaded into the **AS_RESOLUTIONS** table until the data is corrected. Review the error messages and edit accordingly.

Scenario: The following graphic illustrates how to review error messages with the Edit Resolution Interface Records screen.

NAVIGATION

- Click **Review**
- Click **Edit Resolution Interface Records**.

The screenshot shows the 'Edit Resolution Interface Records' window. At the top, there are fields for 'Load Group' (BCR_XX), 'Record Group' (3), and 'Processed'. Below these, an error message is displayed: 'ORA-01403: no data found (Identifier:inventory asset - XX01 Type:barcode scan Stm1:BUILDING E Stm2:ROOM 200 Stm3:3)'. To the right of the error message is the 'Date/Time:07/06/1998 13:34:00 Site:LIVERMORE'. A 'Go To Error' button is highlighted with a blue box. Below the error message, there are several data entry fields organized into sections: 'Interest Type Prefix' (INVENTORY ASSET) and 'Identifier' (XX01); 'Resolution Type Code' (BARCODE SCAN) and 'Description'; 'Rec By' (020866), 'Timezone', and 'Datetime' (07/06/1998 13:34:00); 'Name'; 'Code', 'Description', and 'Identifier'; 'Site' (LIVERMORE); 'Structure Level 1' (BUILDING), 'Identifier' (E); 'Structure Level 2' (ROOM), 'Identifier' (200); and 'Structure Level 3' with 'Mail Stop' and 'Upd Loc?' (Y).

Figure 6-14: Reviewing Error Messages

Use the **Edit Resolution Interface Records** screen to correct any errors that occur while attempting to move your data from the **AS_LOAD_RESOLUTIONS** table to the **AS_RESOLUTIONS** table. The above example tells us that at least one error is preventing the data from loading to the **AS_RESOLUTIONS** table. If you have trouble spotting where to correct the error on this screen, then click the **Go To Error** button and your cursor is placed in the field requiring the edit. Update the information accordingly. If you have multiple errors for a record, you can scroll through the error messages by clicking the next record icon to review all of the error messages.

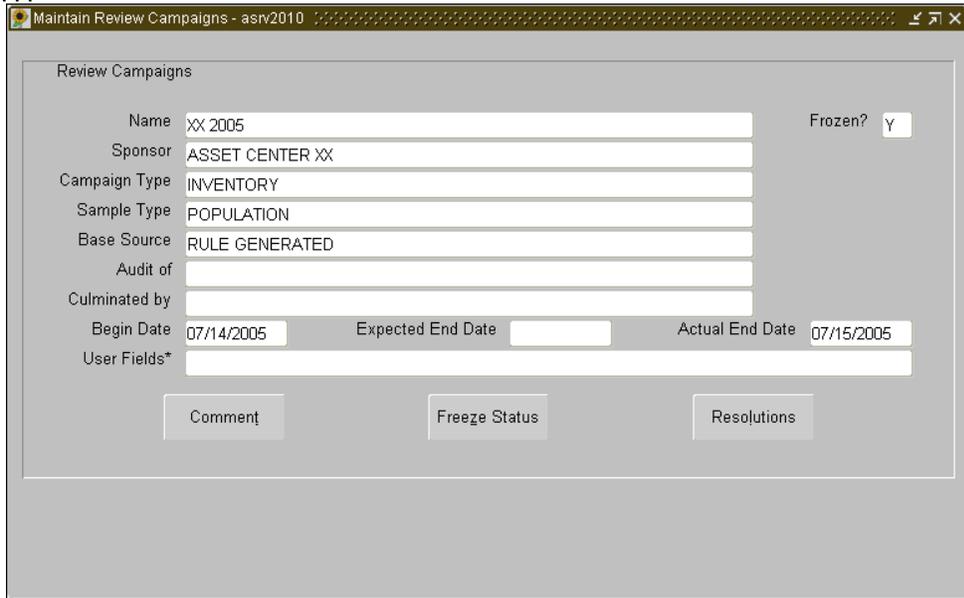
CLOSE REVIEW CAMPAIGN

The closing of a campaign is the final step in the review campaign lifecycle that occurs after all assets within your baseline have been accounted for and outstanding assets have been declared. To end the review, specify the final closing date of the review campaign.

Scenario: The following graphic illustrates how to close a campaign.

NAVIGATION

- Click Review
- Click Maintain Review Campaigns



The screenshot shows a web application window titled "Maintain Review Campaigns - asrv2010". The window contains a form titled "Review Campaigns" with the following fields and values:

Name	XX 2005	Frozen?	<input checked="" type="checkbox"/>
Sponsor	ASSET CENTER XX		
Campaign Type	INVENTORY		
Sample Type	POPULATION		
Base Source	RULE GENERATED		
Audit of			
Culminated by			
Begin Date	07/14/2005	Expected End Date	
		Actual End Date	07/15/2005
User Fields*			

At the bottom of the form, there are three buttons: "Comment", "Freeze Status", and "Resolutions".

Figure 6-9: Closing a Review Campaign

Step 1. Navigate to the **Maintain Review Campaigns** screen.

Step 2. Enter the name of the review campaign in the **Name** field.

Step 3. Enter the date the review campaign actually ends in the **Actual End Date** field.

Double-click in the field to display a calendar for selection of dates. This date freezes the results of the campaign.

Step 4. Click the **Comment** button at the bottom of the screen to display the **Capture Comments, Pictures, and Attachments** screen if you want to enter a comment for a review campaign closure.

Add your comments, pictures or attach supporting documentation as needed. Click the **Save** icon to return to the **Maintain Review Campaigns** screen.

Step 5. Click the **Save** icon to close the review campaign.

REVIEW (PHYSICAL INVENTORY) REPORTS

There are a variety of Sunflower Review module reports that can help you conduct a review campaign (physical inventory) successfully. Review reports such as the **Review Resolutions Summary** report, provide insight into the progress of your campaign and how the organizations and regions involved are doing in comparison to one another. Additional review reports indicate the manner in which resolution results are achieved over a period of time for the current year's review or a series of years.

Sunflower provides a flexible and comprehensive web-based reporting system. The Sunflower database is queried when a report is created and executed. Reports display real-time information. Therefore, an afternoon report will differ from a morning report by reflecting any changes made during the day.

There are several output options available for your reports.

- PDF (Adobe Acrobat)
- HTML
- Text

Your outputs depend upon the report selected. Acrobat and HTML are standard options provided for most reports. Text file export is available for selected reports.

The following discussion highlights some of the reports that you can use to manage the inventory review cycle:

- "Review Campaign Properties" on page 475
- "Review Resolution Summary" on page 479
- "Executive Review Resolution Summary" on page 482
- "Review Campaign Base Assets" on page 485
- "Review Campaign Base Assets with Resolution Information" on page 488

REVIEW CAMPAIGN PROPERTIES

Use the **Review Campaign Properties** report to display the details of the campaign parameters. To run a report perform the following:

Step 1. Select either **Review > Review Reports** or **Reports > Review Reports**.

Step 2. Click the **Review Campaign Properties** report

NOTE: This report displays the properties of one review campaign at a time.

Step 3. Click the **Submit** button, select the desired output format, and click the **eXecute** button.

NAVIGATION

- Click **Review**
- Click **Review Reports**
- or...
- Click **Reports**
- Click **Review Reports**
- Click **Review Campaign Properties**

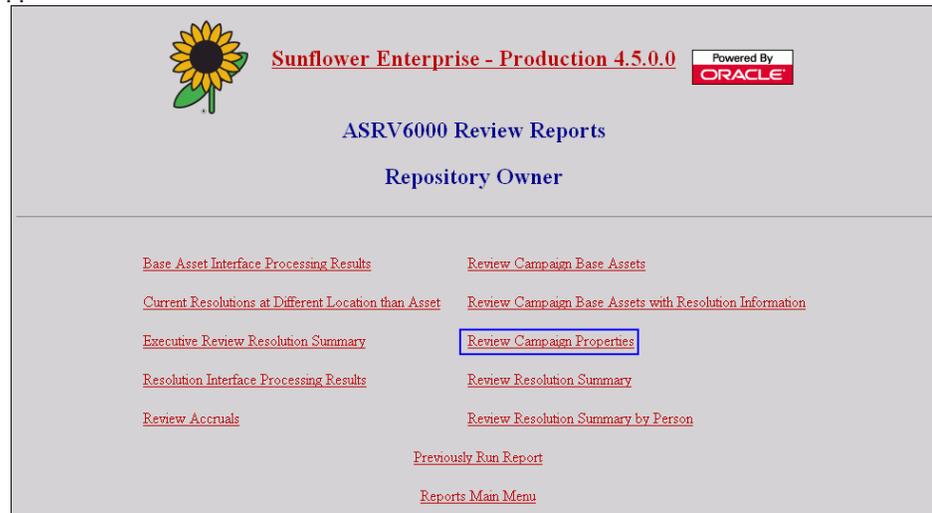


Figure 6-17: Selecting the Review Campaign Properties Report

REVIEW CAMPAIGN PROPERTIES REPORT PARAMETERS

Select a Review Campaign ID to generate a report.



 **Sunflower Enterprise - Production 4.5.0.0 Review Reports**

ASRV6020 Review Campaign Properties

Review Campaign

[Review Reports](#)

Figure 6-18: Review Campaign Properties Report Parameters

REVIEW CAMPAIGN PROPERTIES REPORT OUTPUT

The **Review Campaign Properties** report provides a summary displaying the properties (e.g. baseline criteria, allowed resolution and dates) for a selected review campaign.

Sunflower Enterprise		Review Campaign Properties		Page 2 of 4	
ASRV6020				05/30/2006 15:16	
Review Campaign					
Review Campaign : REVIEW CAMPAIGN 1					
Sponsor : SUNFLOWER SYSTEMS					
Campaign Type : INVENTORY					
Sample Type : POPULATION					
Base Source : RULE GENERATED					
Audit of :					
Culminated by :					
Begin Date : 05/01/1999		Expected End Date :		End Date :	
User Fields :					
Base Count : 121					
Base Rules					
Identifier : 1					
Attribute		Operator		Operand	
INVENTORY ASSET START DATE		>		01/01/1990	
Text					
Base Creation Statement					
Text					
Base Frozen Statuses					
Frozen?		Datetime		Comment	
Y		05/09/1999 16:35:29			

Figure 6-19: Campaign Properties Report 1 of 2

Sunflower Enterprise	Review Campaign Properties								Page 3 of 4	
ASRV6020									05/30/2006 15:16	
Review Campaign										
Valid Resolution Types										
Valid Resolution Type	Sponsor	Steward	Custoi	User	Any	Rank	Sort	Begin Date	End Date	
BARCODE KEY	Y	Y	Y	Y	Y	999	999			
BARCODE SCAN	Y	Y	Y	Y	Y	1	1			
CONFIRMED UNACCOUNTED	Y	N	N	N	N	4	4			
DECLARE UNACCOUNTED	Y	Y	N	N	N	3	3			
ONLINE DECLARATIVE	Y	Y	Y	N	N	7	7			
ONLINE PHYSICAL	Y	Y	Y	N	N	6	6			

Figure 6-20: Campaign Properties Report 2of 2

REVIEW RESOLUTION SUMMARY

Run the **Review Resolution Summary** report using a grouping selection of Level 1 Structure (*Building*) to display an itemized list of open and found items and how they were found (e.g. barcode scan, online physical, barcode key, etc.).

- Step 1.** Select either **Review > Review Reports** or **Reports > Review Reports**.
- Step 2.** Click the **Review Resolution Summary** report
- Step 3.** Click the **Submit** button, select the desired output format, and click the **eXecute** button.

NAVIGATION

- Click **Review**
- Click **Review Reports**
- or...
- Click **Reports**
- Click **Review Reports**
- Click **Review Resolution Summary**



The screenshot shows the Sunflower Enterprise - Production 4.5.0.0 interface. At the top left is a sunflower logo. To its right is the text "Sunflower Enterprise - Production 4.5.0.0" and a "Powered By ORACLE" logo. Below this is the heading "ASRV6000 Review Reports" and "Repository Owner". A list of links is displayed in a grid format:

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

The link "Review Resolution Summary" is highlighted with a blue rectangular box.

Figure 6-21: Selecting the Review Resolution Summary Report

REVIEW RESOLUTION SUMMARY REPORT PARAMETERS

Select the **Review Resolution Summary** report parameters to generate a report. Use the Ctrl key to select additional campaigns.

 Sunflower Enterprise - Production 4.5.0.0 Review Reports

ASRV6030 Review Resolution Summary

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

Review Campaigns:

Interest Type:

Manager:

Owner:

Steward:

Include the Steward's child Organizations

Location:

How Would You Like the Assets to be Grouped?

[Review Reports](#)

Figure 6-22: Review Resolution Summary Report Parameters

REVIEW RESOLUTION SUMMARY REPORT OUTPUT

The **Review Resolution Summary** report provides a summary of physical inventory results, by review type and person for a selected set of review campaigns.

Sunflower Enterprise		Review Resolution Summary				Page 2 of 4
ASRV6030						05/30/2006 15:26
OPEN						
	<u>Flags</u>	<u>Count</u>	<u>% by Count</u>	<u>Value</u>	<u>% by Value</u>	
	Sensitive	44.00	100.00	\$ 205,700.00	100.00	
	High Risk	.00	.00	\$.00	.00	
	<u>OTHER</u>	<u>77.00</u>	<u>100.00</u>	<u>\$ 824,450.00</u>	<u>100.00</u>	
Subtotal		121.00		\$ 1,030,150.00		
% of Totals		100.00		100.00		
Totals						
	<u>Flags</u>	<u>Count</u>	<u>% by Count</u>	<u>Value</u>	<u>% by Value</u>	
	Sensitive	44.00	100.00	\$ 205,700.00	100.00	
	High Risk	.00	.00	\$.00	.00	
	<u>OTHER</u>	<u>77.00</u>	<u>100.00</u>	<u>\$ 824,450.00</u>	<u>100.00</u>	
Subtotal		121.00		\$ 1,030,150.00		
% of Report Totals		100.00		100.00		

Figure 6-23: Review Resolution Summary Report

EXECUTIVE REVIEW RESOLUTION SUMMARY

The **Executive Review Resolution Summary** report is a summary of the campaign progress and status. Use the grouping option to widen or narrow your results. Select **NONE** to display your entire campaign status. The benefit of using grouping is that if you select a value from the reports parameter page, such as a Level 1 Structure, *Building*, to create a report with totals based on a building-by-building basis. This enables you to compare the relative values and percentages of property located in each building. Alternatively, you can run a detailed view of the report to view the assets that are located within a specified building using the **Location** parameter.

Step 1. Select either **Review > Review Reports** or **Reports > Review Reports**.

Step 2. Click the **Executive Review Resolution Summary** report

Step 3. Click the **Submit** button, select the desired output format, and click the **eXecute** button.

NAVIGATION

- Click **Review**
- Click **Review Reports**
- or...
- Click **Reports**
- Click **Review Reports**
- Click **Executive Review Resolution Summary**



The screenshot shows the Sunflower Enterprise - Production 4.5.0.0 interface. At the top left is a sunflower logo. To its right is the text "Sunflower Enterprise - Production 4.5.0.0" and a "Powered By ORACLE" logo. Below this is the heading "ASRV6000 Review Reports" and "Repository Owner". A list of links is displayed in two columns:

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

Figure 6-24: Selecting the Executive Review Resolution Summary Report

EXECUTIVE REVIEW RESOLUTION SUMMARY REPORT PARAMETERS

Select the **Executive Review Resolution Summary** report parameters to generate the report. Use the Ctrl key to select additional review campaigns.

Sunflower Enterprise - Production 4.5.0.0 Review Reports

ASRV6050 Executive Review Resolution Summary

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

Review Campaigns:

Interest Type:

Manager:

Owner:

Steward:

Include the Steward's child Organizations

Location: Site/Off-Site Type: Stiv1 Type: Stiv1 Identifier:

How Would You Like the Assets to be Grouped?

[Review Reports](#)

Figure 6-25: Executive Review Resolution Summary Report Parameters

EXECUTIVE REVIEW RESOLUTION SUMMARY REPORT OUTPUT

The **Executive Review Resolution Summary** report provides a summary of the campaign progress and status. Notice that the report groups the results based on the previous parameters settings for Level 1 Structures, Buildings.

Sunflower Enterprise ASRV6050		Executive Review Resolution Summary						Page 2 of 5 05/30/2006 15:33	
Level 1 Structure : : :									
	Base	Positive Resolution	% Pos	Confirmed	Unlocated	% Cn Unl	Open	% Open	
Sensitive	0	0	.00	0	.00		0	.00	
\$	.00	\$	.00	\$	.00		\$	.00	.00
High Risk	0	0	.00	0	.00		0	.00	
\$	.00	\$	.00	\$	.00		\$	.00	.00
OTHER	11	0	.00	0	.00		11	100.00	
\$	269,500.00	\$	.00	\$	.00		\$	269,500.00	100.00
Subtotal	11	0	.00	0	.00		11	100.00	
\$	269,500.00	\$	0.00	\$	.00		\$	269,500.00	100.00
Level 1 Structure : LIVERMORE : BUILDING : E									
	Base	Positive Resolution	% Pos	Confirmed	Unlocated	% Cn Unl	Open	% Open	
Sensitive	22	0	.00	0	.00		22	100.00	
\$	96,900.00	\$	.00	\$	.00		\$	96,900.00	100.00
High Risk	0	0	.00	0	.00		0	.00	
\$	.00	\$	.00	\$	.00		\$	.00	.00
OTHER	44	0	.00	0	.00		44	100.00	
\$	219,450.00	\$	.00	\$	.00		\$	219,450.00	100.00
Subtotal	66	0	.00	0	.00		66	100.00	
\$	316,250.00	\$	0.00	\$	.00		\$	316,250.00	100.00

Figure 6-26: Executive Review Resolution Summary Report

The resulting output displays the progress of the review campaign by count and value.

REVIEW CAMPAIGN BASE ASSETS

The **Review Campaign Base Assets** report shows the details of the review campaign base assets by resolution type (e.g. open, barcode scan and barcode key) for a selected review campaigns.

- Step 1.** Select either **Review > Review Reports** or **Reports > Review Reports**.
- Step 2.** Click the **Review Campaign Base Assets** report
- Step 3.** Click the **Submit** button, select the desired output format, and click the **eXecute** button.

NAVIGATION

- Click **Review**
- Click **Review Reports**
- or...
- Click **Reports**
- Click **Review Reports**
- Click **Review Campaign Base Assets**



Figure 6-28: Selecting the Review Campaign Base Assets Report

REVIEW CAMPAIGN BASE ASSETS REPORT OUTPUT

The **Review Campaign Base Assets** report reveals the details of the review campaign base assets, by resolution type (e.g. open, barcode scan and barcode key) for a selected review campaigns.

Sunflower Enterprise ASRV6010		Review Campaign Base Assets				Page 2 of 23 05/30/2006 15:41	
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
INV 0101	S	COMPUTER PORTABLE	APPLE	M5555	9437198	\$ 4,500.00	01/01/1995
		Steward: ASSET CENTER 01 Custodian: DOE JOHN 050598 User:		Location: LIVERMORE BUILDING: G ROOM: 200			
INV 0102	S	COMPUTER PERSONAL	DELL	D333	03420349	\$ 3,400.00	05/01/1998
		Steward: ASSET CENTER 02 Custodian: FRAZIER KRISTEN S 020866 User:		Location: LIVERMORE BUILDING: E ROOM: 100			
INV 0103	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	84398142759	\$ 5,400.00	08/01/1997
		Steward: ASSET CENTER 01 Custodian: FRAZIER KRISTEN S 020866 User:		Location: LIVERMORE BUILDING: E ROOM: 200			
INV 0104	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	938204	\$ 5,400.00	08/01/1997
		Steward: ASSET CENTER 01 Custodian: ONE CUSTODIAN CUST01 User:		Location: LIVERMORE BUILDING: F ROOM: 100			
INV 0105		SEDAN	FORD MOTOR COMPANY	TAURUS	48759475430	\$ 26,000.00	01/01/1990
		Steward: ASSET CENTER 01 Custodian: ONE CUSTODIAN CUST01 User:		Location: LIVERMORE BUILDING: F :			
INV 0106		OSCILLOSCOPE	TEKTRONIX	T11209	3432402HH	\$ 4,500.00	01/01/1993
		Steward: ASSET CENTER 01 Custodian: ONE CUSTODIAN CUST01 User:		Location: LIVERMORE BUILDING: F ROOM: 100			

Figure 6-30: Review Campaign Base Assets Report

REVIEW CAMPAIGN BASE ASSETS WITH RESOLUTION INFORMATION

Another useful report is the **Review Campaign Base Assets with Resolution Information** report. This report displays all of the assets in the database subject to an ongoing review with detailed resolution information that can also be used as a printout for the hand-written capture of changes to an asset's steward, custodian, user or location information.

- Step 1.** Select either **Review > Review Reports** or **Reports > Review Reports**.
- Step 2.** Click the **Review Campaign Base Assets with Resolution Information** report
- Step 3.** Click the **Submit** button, select the desired output format, and click the **eXecute** button.

NAVIGATION

- Click **Review**
- Click **Review Reports**
- or...
- Click **Reports**
- Click **Review Reports**
- Click **Review Campaign Base Assets with Resolution Information**



Figure 6-31: Selecting the Review Campaign Base Assets with Resolution Information Report

REVIEW CAMPAIGN BASE ASSETS WITH RESOLUTION INFORMATION REPORT PARAMETERS

Select the **Review Campaign Base Assets with Resolution Information** report parameters to generate a report. Use the Ctrl key to select additional review campaigns. Select an option from the **Resolution Types** field to display items that are found based on a selection type. *Open*, is a resolution type for assets that have not been found yet in the physical inventory process.

Sunflower Enterprise - Production 4.5.0.0 Review Reports

ASRV6040 Review Campaign Base Assets with Resolution Information

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

Review Campaigns: L10, L12, REVIEW CAMPAIGN 1, REVIEW CAMPAIGN 2, S01, S02, S03, S04

Interest Type: []

Manager: []

Owner: []

Steward: []

Include the Steward's child Organizations

Official Name: []

Manufacturer: []

Model: []

Custodian: Identifier, Last Name, First, Mid, Prefix, Suffix

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

Location: Site/Off-Site Type, Sdv1 Type, Sdv1 Identifier, Sdv2 Type, Sdv2

Resolution Types: All (Excluding Open), Open, AGREEMENT ASSET IDENTIFIER CHANGE, AGREEMENT ASSET FINAL EVENT, AGREEMENT ASSET INITIAL EVENT, ASSIGN COMPONENT, BARCODE KEY, BARCODE SCAN

Include Only Suspicious Resolutions? (CONFIRMED UNLOCATED With a More Recent Resolution OR Event)

Include Only Assets With a Resolution Recorded Between [] (MM/DD/YYYY) and [] (MM/DD/YYYY)

Asset User Fields: []

How Would You Like the Assets to be Grouped? NONE

How Would You Like the Assets to be Sorted? 1 IDENTIFIER, 2 IDENTIFIER, 3 IDENTIFIER

Submit Reset

Review Reports

Figure 6-32: Review Campaign Base Assets with Resolution Information Report Parameters

REVIEW CAMPAIGN BASE ASSETS WITH RESOLUTION INFORMATION REPORT OUTPUT

The **Review Campaign Base Assets with Resolution Information** report displays all of the assets in the database subject to an ongoing review with detailed resolution information. You can also use this report as a printout for the hand-written capture of changes to an asset’s steward, custodian, user or location information as shown in the following sample report.

Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
INV 0101	S	COMPUTER PORTABLE	APPLE	M5555	9437199	\$ 4,500.00	01/01/1995
Steward : ASSET CENTER 01 Custodian : DOE JOHN 050599 User : Location : LIVERMORE BUILDING : G ROOM : 200		Review Campaign: REVIEW CAMPAIGN 1 Resolution: _____ Auth/Rec By: _____ Details : Location : Site : _____ Level 1 structure : _____ Level 2 structure : _____ Other address : _____ Document : _____ Just. Level : _____					
INV 0102	S	COMPUTER PERSONAL	DELL	D333	03420349	\$ 3,400.00	05/01/1998
Steward : ASSET CENTER 02 Custodian : FRAZIER KRISTEN S 020866 User : Location : LIVERMORE BUILDING : E ROOM : 100		Review Campaign: REVIEW CAMPAIGN 1 Resolution: _____ Auth/Rec By: _____ Details : Location : Site : _____ Level 1 structure : _____ Level 2 structure : _____ Other address : _____ Document : _____ Just. Level : _____					
INV 0103	S	COMPUTER PORTABLE	GATEWAY	SOLO 9100	94399342759	\$ 5,400.00	08/01/1997
Steward : ASSET CENTER 02 Custodian : FRAZIER KRISTEN S 020866 User : Location : LIVERMORE BUILDING : E ROOM : 200		Review Campaign: REVIEW CAMPAIGN 1 Resolution: _____ Auth/Rec By: _____ Details : Location : Site : _____ Level 1 structure : _____ Level 2 structure : _____ Other address : _____ Document : _____ Just. Level : _____					

Figure 6-33: Review Campaign Base Assets with Resolution Information Report

OTHER REVIEW REPORTS

The following is a list of reports and their description of each report that was not previously covered in this section.

- **Base Asset Interface Processing Results** - shows the results of processing the contents of interface table AS_LOAD_BASE_ASSETS, a mechanism which is used to load review baselines from files.
- **Review Resolution Summary by Person** - shows a summary, by resolution type and person, of resolutions captured for a selected set of review campaigns.
- **Current Resolutions at Different Location than Asset** - shows assets whose last physical inventory review occurred at a different location than the location of the asset record.
- **Review Accruals** - shows untagged assets found, and lost assets recovered, for a selected set of review campaigns.
- **Base Asset Interface Processing Results** - shows the results of processing the contents of interface table AS_LOAD_BASE_ASSETS, a mechanism which is used to load review baselines from files.



PERSONAL ASSET PROVISIONING

The Personal Asset Provisioning feature in conjunction with Sunflower Enterprise enables you to perform stockroom asset management tasks. The Personal Asset Provisioning feature leverages Sunflower's robust asset lifecycle management software by using the capabilities that Inactive and Management module offer to manage identified and commodity assets. The Personal Asset Provisioning feature provides a set of self-service html transaction pages that makes it easy to issue, manage and handle returns and exchanges of stock assets that your personnel count on to get the job done. This feature is made secure by using database or proxy user authentication, which simplifies the look and feel of using Sunflower Enterprise applications based on a user role and the desired task that you wish to perform.

KEY CONCEPTS

This chapter includes the following discussion points and concepts:

- "About Personal Asset Provisioning"
- "Personal Asset Provisioning Roles"
- "Setup of Personal Asset Provisioning"
- "Personal Asset Provisioning"
- "Consolidate Commodity Stock Assets"
- "Perform Asset Search"
- "Retire Stock Assets"
- "Create Personal Asset Provisioning Reports"

ABOUT PERSONAL ASSET PROVISIONING

Personal Asset Provisioning is an innovative asset management solution that leverages several of the existing Sunflower Enterprise delivered modules with new html self-service transaction pages. This combined solution enables you to carry out the typical transactions that a stock room performs to support your organization. Sunflower Enterprise Personal Asset Provisioning can help you capture transactions such as issuing standard uniforms to controlled assets such as firearms.

Use the Personal Asset Provisioning feature in conjunction with Sunflower applications to manage and monitor stock room issued assets.

The following summarizes the setup and maintenance tasks for **Administrators** and **Managers** working with Personal Asset Provisioning:

- “Create Initial Asset Event Types” on page 500
- “Create Final Asset Event Types” on page 502
- “Define Default Event Types for Stock Assets” on page 508
- “Create a New Manufacturer” on page 511
- “Create Issue and Return Points” on page 513
- “Create Catalog Entries” on page 520

The following are maintenance tasks for **Managers** and **Clerks** working with Personal Asset Provisioning:

- “Create Identified Property Records (Assets)” on page 524
- “Create Commodity Property Records (Assets)” on page 526
- “Issue Assets” on page 531
- “Return Stock Assets” on page 536
- “Exchange Assets” on page 539
- “Identify Lost, Stolen, or Damaged Assets” on page 542
- “Consolidate Commodity Stock Assets” on page 545
- “Perform Asset Search” on page 547
- “Retire Stock Assets” on page 550
- “Create Personal Asset Provisioning Reports” on page 558

PERSONAL ASSET PROVISIONING ROLES

Sunflower approaches asset management with the belief that you can manage, monitor, control, and account for an asset throughout its lifecycle. Sunflower does not impose the way in which you manage your assets but provides guidelines, structures, processes, and tools to help you manage them effectively. The users that you assign to manage the various aspects of an asset at each stage of the lifecycle will depend upon your organizational structure and processes.

A Sunflower user is any individual to whom you assign one or more roles. The assignment of Sunflower roles enables users to perform job duties that are enabled by the specified role. Roles provide access to screens and define the extent to which an individual can perform functions such as adding, updating, and retiring asset records. The user in question may be an employee or a contractor working on the behalf of your organization who has a job function that requires either active (e.g. create, update or delete functions) or passive (e.g. general inquiry, searching and reporting) use of Sunflower application menu items and Stock Asset Management html self-service transaction pages.

The Personal Asset Provisioning feature roles include the Administrator and a collection of Sunflower application roles. Depending on your organizational structure, you may find that in a small, or centralized organization that you assign most of the users as Personal Asset Provisioning Managers responsible for performing all or many of the tasks related to inactive asset management with a small number of users assigned as Personal Asset Provisioning Clerks to carry out the daily business process. Refer to “Personal Asset Provisioning Menu Access” on page 496 to view the menu items that are accessible for each Personal Asset Provisioning role and the various Sunflower application roles that make up the Personal Asset Provisioning Manager and Clerk roles.

PERSONAL ASSET PROVISIONING MENU ACCESS

When assigning roles to users, it is important to map out the functional responsibilities of your users and decide based on the tasks that each user must perform how to assign the appropriate application roles. Individuals that will use the Personal Asset Provisioning feature will need to be assigned a combination of roles. This is because the Personal Asset Provisioning feature enables you to issue stock assets (inactive interest type) to custodians. When the asset is issued to a custodian, the stock asset becomes an inventory asset interest type. In order for an individual to issue stock assets to custodians, they must be assigned an **Inactive** and **Management** (Inventory) module role. The simplest model for granting access to the Personal Asset Provisioning feature is to assign a user the Inactive and Inventory Manager roles. In addition, you might want to assign the Cataloger role to this same user so that they can create catalog entries for new manufacturers. For clarity, let us call this combined assignment of roles the Personal Asset Provisioning Manager. You can assign a user a combination of inactive clerk and inventory clerk roles but there will be restriction on what assets they can issue and to whom based on the steward organization assignment.

For more information about Sunflower application roles, see the Roles chapter in the Sunflower Enterprise User Guide.

The **Personal Asset Provisioning Manager** role is actually made up of several existing Sunflower application roles detailed as follows:

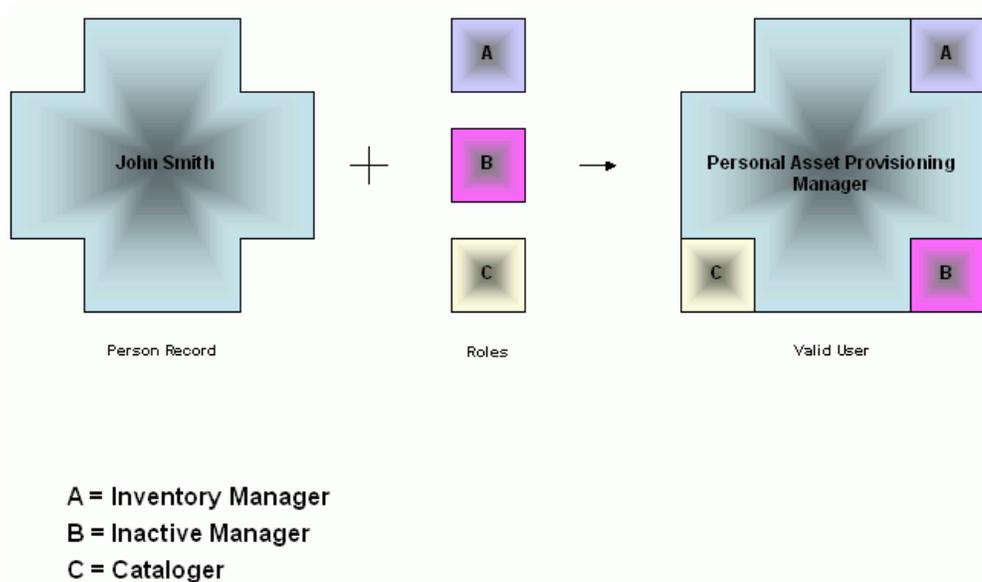
- **Personal Asset Provisioning Manager** role is comprised of the **Inactive Manager**, **Inventory Manager**, and **Cataloger** roles.

Depending upon your business practices and policies, you may want to create a **Personal Asset Provisioning Clerk** role. Just like the **Personal Asset Provisioning Manager** role, a clerk will need to have the combined ability to manage both inactive and inventory assets. The clerk role, however, has the further limitation of managing only those assets assigned to organizations to which they are an organization contact.

A Personal Asset Provisioning transaction requires the ability to manage stock assets (inactive asset interest type) and inventory assets simultaneously. When a stock asset is issued to a custodian, the stock asset ceases to be an inactive asset and immediately becomes an inventory asset. Without the assignment of the inactive and inventory roles, a user cannot carry out transactions with Personal Asset Provisioning.

NOTE: Assigning a user with only an inactive module role gives them access to Personal Asset Provisioning feature but they cannot carry out any transactions other than the consolidation of stock assets. A user that has been assigned with only a Management (inventory asset) module role cannot access the feature at all.

The following graphic illustrates the process for creating a **Personal Asset Provisioning Manager**:



For more information about menu access based on pertinent roles, see the Roles chapter of the Sunflower Enterprise User Guide.

The table below lists menu access for Sunflower applications and the Stock Asset Management html self-service transaction pages based upon the required Personal Asset Provisioning roles.

MENU ITEMS	ROLES		
	ADMINISTRATOR	MANAGER	CLERK
Maintain Domains (Admin)	Yes	Yes	---
Maintain Asset Event Types (Admin)	Yes	Yes	---
Maintain Catalog Official Names (Admin)	Yes	Yes	Yes*
Maintain Federal Supply Classifications (Admin)	Yes	Yes	Yes*
Maintain Inactive Types (Admin)	Yes	Yes	---
Maintain Organization Types (Admin)	Yes	Yes	---
Maintain Valid Asset Events (Admin)	Yes	Yes	---
Define Registered Applications Parameter Values (Admin)	Yes	---	---
Maintain Organizations (Admin)	Yes	Yes	---
Maintain Organizations Types (Admin)	Yes	Yes	---
(Inventory and Inactive) Asset Summary and History	Yes	Yes	Yes
Asset Search (Mgmt and Inactive)	Yes	Yes	Yes
Maintain Catalog Entries (Mgmt and Inactive)	Yes	Yes	Yes*
Transfer (Inventory and Inactive) Asset Value	Yes	Yes	Yes
Maintain (Inventory and Inactive) Assets	Yes	Yes	Yes
Maintain (Inventory and Inactive) Asset Ongoing Events	Yes	Yes	Yes
Create (Inventory and Inactive) Asset Final Events	Yes	Yes	Yes
Edit (Inventory and Inactive) Asset Interface Records	Yes	Yes	Yes
Process (Inventory and Inactive) Asset Interface Records	Yes	Yes	Yes
Process (Inventory and Inactive) Asset PO Interface Records	Yes	Yes	Yes
Edit Asset Value Component Interface Records	Yes	Yes	Yes
Change (Inventory and Inactive) Asset Information	Yes	Yes	Yes
Request Inventory Asset Information (Mgmt)	Yes	Yes	Yes
Close Inventory Asset Requests (Mgmt)	Yes	Yes	Yes
Maintain Inventory Asset User Fields (Mgmt)	Yes	Yes	Yes
Maintain Inventory Asset Comment/Picture (Mgmt)	Yes	Yes	Yes
Maintain Asset Structures (Mgmt and Inactive)	Yes	Yes	Yes
Management Reports (Mgmt)	Yes	Yes	Yes
Request Inactive Receival Request (Inactive)	Yes	Yes	Yes
Withdraw Inactive Receival Request (Inactive)	Yes	Yes	Yes
Deny Inactive Receival Request (Inactive)	Yes	Yes	Yes
Request Inactive Asset Redeployment (Inactive)	Yes	Yes	Yes
Withdraw Inactive Redeployment Requests (Inactive)	Yes	Yes	Yes
Inactive Reports (Inactive)	Yes	Yes	Yes
Maintain Stock Assets (pages)	Yes	Yes	Yes
Consolidate Commodity Stock Assets (pages)	Yes	Yes	Yes

SETUP OF PERSONAL ASSET PROVISIONING

Administrators and Managers must perform several setup steps before users can work with the Personal Asset Provisioning feature.

Assets that are issued from a stockroom or some other controlled area are inactive until they are issued to an individual. The Personal Asset Provisioning feature uses the existing Inactive module to manage the storage and issuance of inactive assets. After the assets are issued to an individual, the Management module tracks the assets until they are returned to storage or consumed.

Before working with the Personal Asset Provisioning feature, you must setup a series of initial and final event types that will support the Personal Asset Provisioning feature and associate these asset event types with their respective modules. You can define these event types in a manner that is consistent with your business practices and policies. The example below is just an example of how to name the event types. In addition, the final event for one module is an initial event for another module. The example below recycles the terms for consistency but you must create the two sets of asset event types for both the asset initial event types and asset final event types. For more information about asset event types, see The Events chapter of the Sunflower Enterprise Administration Guide.

The summary of setup steps are as follows:

Step 1. Create **Asset Event Types** (initial and final events).

- **Inventory:**
 - *Initial: Issued From Inactive to Inventory*
 - *Final: Returned From Inventory to Inactive*
- **Inactive:**
 - *Initial: Returned From Inventory to Inactive*
 - *Final: Issued From Inactive to Inventory*

Step 2. Associate the **Asset Event Types** (Created in Step 1 above) to their respective modules.

Step 3. Define **Default Event Types**. (Optional)

Step 4. Create **Manufacturers**. (Maintain Organizations)

Step 5. Create **Catalog Entries** to support stock assets.

Step 6. Create **Issue and Return Point (IRP)** locations. (Maintain Locations)

Step 7. Create **People** records and associated **Role** assignments. (Maintain People and Users)

CREATE INITIAL ASSET EVENT TYPES

To support the Personal Asset Provisioning feature, you must create asset initial event types that the **Inactive** and **Inventory** modules can use to support the issuance and return transactions of stock assets. Specifically, use the **Maintain Asset Event Type** screen to define the asset initial event type that supports the issuance of a stock asset to an individual and another asset initial event type that supports the return of a previously issued stock asset. For more information about asset event types, see The Events chapter of the Sunflower Enterprise Administration Guide.

Scenario: The following graphic illustrates how to create new asset initial events to support the issuance and return of assets when working with the Personal Asset Provisioning feature. In this example, two new asset initial event types are created. The new asset initial event types are Issued From Inactive to Inventory and Returned from Inventory to Inactive.

NAVIGATION

- Click Admin
- Click Domains
- Click Maintain Asset Event Types

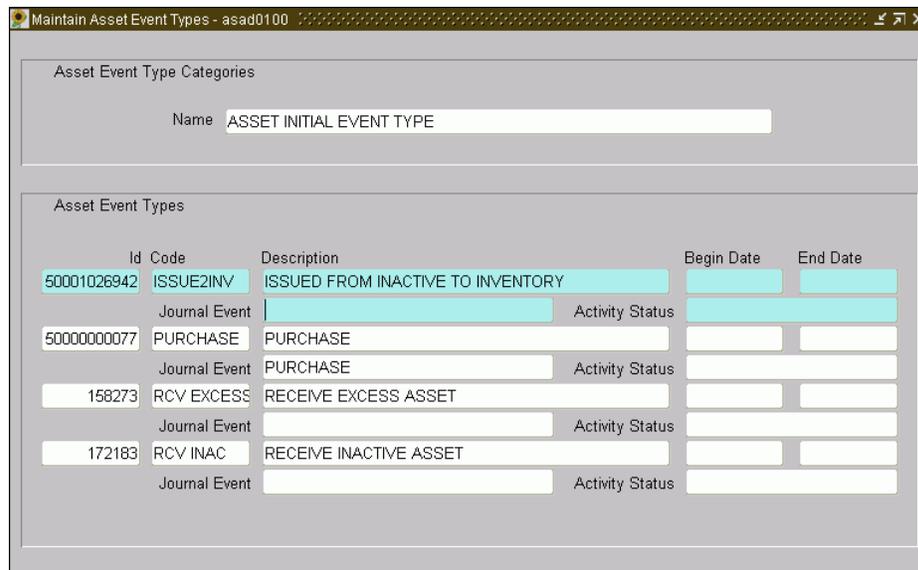


Figure 7-1: Creating Asset Initial Event Types

- Step 1.** Navigate to the **Maintain Asset Event Types** screen.
- Step 2.** Double-click in the **Name** field at the top of the screen.
- Step 3.** Select *Asset Initial Event Type* from the List Of Values (LOV) and click the **Find** icon to return all currently defined asset initial event types.
- Step 4.** Enter the short name of the asset initial event types in the **Code** field.
- Step 5.** Enter the long name of the asset initial event types in the **Description** field.
- Step 6.** Enter the activity status that you want to assign when this event occurs in the **Activity Status** field.

Click the **List** icon for a list of activity statuses. This is an optional field. If this event should not cause a change in activity status, leave this field blank.
- Step 7.** Add rows as needed to accommodate all of your asset initial event types.
- Step 8.** Enter a date that an asset initial event types becomes active in the **Begin Date** field.

Providing a **Begin Date** is optional. If the asset event type is always valid, leave this field blank.
- Step 9.** Enter a date that an asset initial event types becomes inactive in the **End Date** field.

Providing an **End Date** is optional. If the asset event type is always valid, leave this field blank.
- Step 10.** If you are using the **Finance** module and you want to designate a default value for **Journal Event Types**, add the associated journal event type in the **Journal Event** field that is associated with an asset event type. This is an optional field.
- Step 11.** Click the **Save** icon to save the asset initial event type.

CREATE ASSET FINAL EVENT TYPES

To support the Personal Asset Provisioning feature, you must create asset final event types that the **Inactive** and **Inventory** modules can use to support the issuance and return transactions of stock assets. Specifically, use the **Maintain Asset Event Type** screen to define the asset final event type that supports the issuance of a stock asset to an individual and another asset final event type that supports the return of a previously issued stock asset. For more information about asset event types, see The Events chapter of the Sunflower Enterprise Administration Guide.

Scenario: The following graphic illustrates how to create new asset final events to support the issuance and return of assets when working with the Personal Asset Provisioning feature. In this example, two new asset final event types are created. The new asset final event types are Issued From Inactive to Inventory and Returned from Inventory to Inactive.

NAVIGATION

- Click Admin
- Click Domains
- Click Maintain Asset Event Types

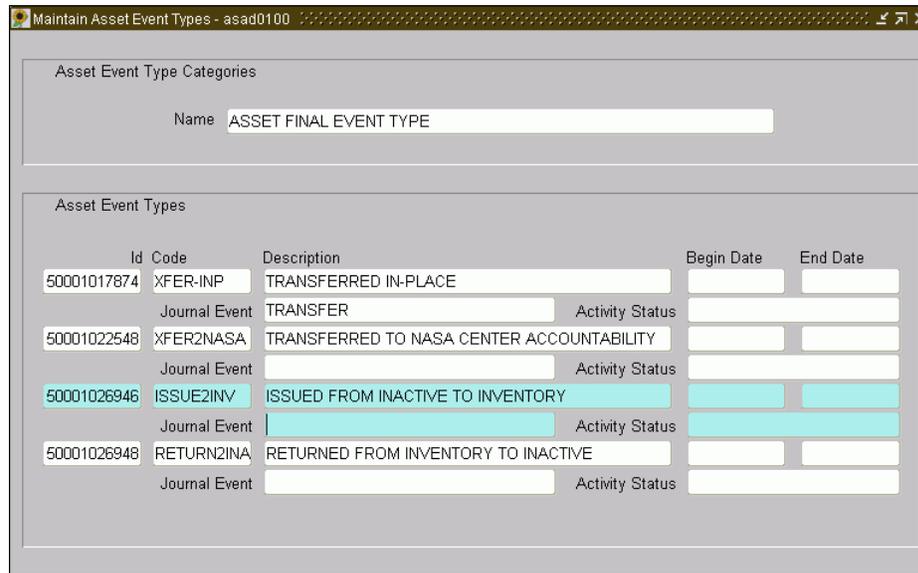


Figure 7-2: Creating Asset Final Event Types

Step 1. Navigate to the **Maintain Asset Event Types** screen.

Step 2. Select the *Asset Final Event Type* in the **Name** field as the category that you want to assign valid asset final event types.

Alternatively, you can place the cursor in the **Name** field and click the **Find** icon to retrieve all the asset event type categories. Use the **Previous Record** and **Next Record** icons to navigate through the records.

Sunflower displays the current codes and descriptions in the **Asset Event Types** block. If no empty rows are available in the **Asset Event Types** block, place the cursor in the last row and click the **Insert** icon.

Step 3. Enter the short name of the asset final event types in the **Code** field.

Step 4. Enter the long name of the asset final event types in the **Description** field.

Step 5. Enter the activity status that you want to assign when this event occurs in the **Activity Status** field.

Click the **List** icon for a list of activity statuses. This is an optional field. If this event should not cause a change in activity status, leave this field blank.

Step 6. Add rows as needed to accommodate all of your asset final event types.

Step 7. Enter a date that an asset final event types becomes active in the **Begin Date** field.

Providing a **Begin Date** is optional. If the asset event type is always valid, leave this field blank.

Step 8. Enter a date that an asset final event types becomes inactive in the **End Date** field.

Providing an **End Date** is optional. If the asset event type is always valid, leave this field blank.

Step 9. If you are using the **Finance** module and you want to designate a default value for **Journal Event Types**, add the associated journal event type in the **Journal Event** field that is associated with an asset event type. This is an optional field.

Step 10. Click the **Save** icon to save your asset final event types.

DEFINE VALID ASSET EVENT TYPES

After defining the new event types for the Personal Asset Provisioning feature, you must associate them to the appropriate Sunflower Enterprise modules. Personal Asset Provisioning uses both the **Inactive** and **Inventory** modules to manage the issuance and returns of assets. Use the **Maintain Valid Asset Events** screen to associate the new event types to the modules. The following section illustrates how to associate the new asset initial event and final event types to the respective modules that support Personal Asset Provisioning.

DEFINE VALID ASSET EVENT TYPES FOR INACTIVE ASSETS

Use the **Maintain Valid Asset Events** screen to define the events that can be recorded for an interest asset.

Scenario: The following graphic illustrates how to use the **Maintain Valid Asset Events** screen to associate the new initial and final events to the Inactive Assets interest type or Inactive Assets module.

NAVIGATION

- Click Admin
- Click Domains
- Click Maintain Valid Asset Events

Asset Event Type	()		Auto Appr	Initiate	Begin Date	End Date
	(F)inal	(O)ngoing				
RECEIVE INACTIVE ASSET	I		N	Y		
RETURNED FROM INVENTORY TO INACTIVE	I		N	Y		
CONSOLIDATED	F		N	Y		
INACTIVE REDEPLOY	F		N	Y		
INTO EXCESS FROM INACTIVE	F		N	Y		
ISSUED FROM INACTIVE TO INVENTORY	F		N	Y		

Figure 7-3: Assigning Valid Asset Events to the Inactive Assets Interest Type

Step 1. Navigate to the **Maintain Valid Asset Events** screen.

NOTE: The **Maintain Valid Asset Events** screen automatically opens in the query mode.

Step 2. Select *Inactive Asset* in the **Type** field to specify the asset interest type that you want to assign valid asset event types. Alternatively, you can place the cursor in the **Type** field and click the **Find** button to retrieve all the agreement interest types available. Use the **Previous Record** and **Next Record** buttons to navigate through the records.

Sunflower displays the current asset event types in the **Valid Asset Events** block. If no empty rows are available in the **Asset Event Type** field, place the cursor in the last row and click the **Insert** button.

Step 3. Enter the name of the asset event type in the **Asset Event Type** field. Click the **List** button to choose from a list of valid asset event types.

If the asset event you are looking for is not part of the list of values, use the **Maintain Asset Event Types** screen to create the desired event type. The **(I)initial (O)ngoing (F)inal** field displays automatically with the assigned asset event type.

Step 4. Enter *Y* if you want to automatically approve the asset event type for the interest asset type, or *N* if you do not want to automatically approve the asset event type for the interest asset type in the **Auto Appr** flag field. This flag is used only by asset final event types.

Auto Appr (Approve): *Y*(Yes) means the asset of this interest type will be automatically retired when another interest asset is retired with this final event type for the same base asset. For example, if you define and associate an asset final event type called *Disposed* to both the **Management** and **Inactive** module and set **Auto Appr** flag field to *Y* for the **Inactive** module, when you create an asset final event of *Disposed* in the **Management** module, the **Inactive** module will automatically assign this same designation for the inactive asset, provided they are the same asset.

Step 5. Enter **Y** if you want to automatically initiate the asset event type for the interest asset type, or **N** if you do not want to automatically initiate the asset event type for the interest asset type in the **Initiate** event flag field.

In the case of an asset final event type, Initiate **Y** means this final event type will appear in the list of values for finalizing the asset for that interest type.

Step 6. Enter a date that an asset event type is to become active in the **Begin Date** field.

Providing a **Begin Date** is optional. If the asset event type is always valid, leave this field blank.

Step 7. Enter a date that an asset event type becomes inactive in the **End Date** field.

Providing an **End Date** is optional. If the asset event type is always valid, leave this field blank.

Step 8. Click the **Save** icon to associate your asset event types to the asset interest type.

DEFINE VALID ASSET EVENT TYPES FOR INVENTORY ASSETS

Use the **Maintain Valid Asset Events** screen to define the events that can be recorded for an interest asset.

Scenario: The following graphic illustrates how to use the **Maintain Valid Asset Events** screen to associate the new initial and final events to the inventory assets interest type or Management module.

NAVIGATION

- Click Admin
- Click Domains
- Click Maintain Valid Asset Events

Maintain Valid Asset Events - asad0120

Asset Interest Types

Type:

Valid Asset Events

Asset Event Type	(I)ntial (O)ngoing	Auto Appr	Initiate	Begin Date	End Date
	(F)inal				
PURCHASE	I	Y	Y		
TRANSFER	I	Y	Y		
STOCK ASSET RETURNED	O	Y	N		
TRANSFERRED IN-PLACE	F	Y	Y		
ISSUED FROM INACTIVE TO INVENTORY	I	N	Y		
RETURNED FROM INVENTORY TO INACTIVE	F	Y	Y		

Figure 7-4: Assigning Valid Asset Events to the Inventory Assets Interest Type

The procedure is the same as the previous example but this time you are associating the asset initial and final event types to the inventory asset interest type or Management module.

NOTE: The asset event types for the inventory asset interest type are exactly reversed from the inactive asset interest type assignment in the previous example. When issuing an asset from a storage location, the asset is an inactive asset that becomes an inventory asset. This action is an inventory asset initial event and an inactive asset final event. Conversely, returning a previously issued asset to storage, this action creates an inactive initial asset event and an inventory asset final event.

DEFINE DEFAULT EVENT TYPES FOR STOCK ASSETS

Sunflower enables you to establish (set) **Default Values** that pre-populate selected fields to make data entry quicker, easier, and more efficient. Default values can be set at three different levels:

- **Individual**

Changes to default values at the individual level only effect a single end user. For more information about defining personal parameter values, see the Parameters chapter of the Sunflower Enterprise Administration Guide.

- **Organization**

Changes to default values at the organization level effect all end users assigned to that particular organization or group (e.g. Central Property Management, etc.). This organization default capability is a result of the **Organization** field data entry on the **Maintain People** screen. For more information about defining organization parameter values, see the Parameters chapter of the Sunflower Enterprise Administration Guide.

- **Application**

Changes to default values at the application or system level effect all users. For more information about defining application parameter values, see the Parameters chapter of the Sunflower Enterprise Administration Guide.

Personal parameter default values can be set by each end user based upon their own needs. **Organization** and **Application** parameter default values are set by the Sunflower Enterprise System Administrator.

NOTE: Default values, regardless of where set can be overridden at the individual or user level.

This section shows you how to set default values for the Personal Asset Provisioning feature. Specifically, how to setup the application parameter default values to utilize the newly created Inactive and Inventory module asset initial and final event types.

Scenario: The following graphic illustrates how to define default values for the Personal Asset Provisioning inactive and management module parameter values.

NAVIGATION

- Click Admin
- Click User Extensibility

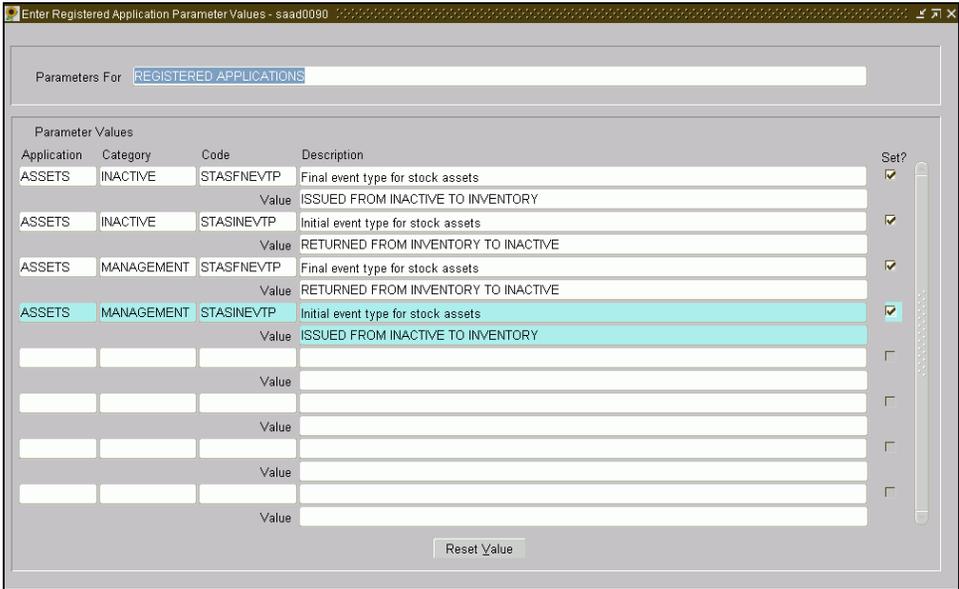


Figure 7-5: Setting Up Default Application Parameter Values

- Step 1.** Navigate to the **Enter Registered Application Parameter Values** screen.
- Step 2.** Double-click to open the list of values (LOV).
- Step 3.** Click the Tab key to populate the **Parameter Values** block.
- Step 4.** Select the parameter values for which you will define a default value.
- **Application** *ASSETS*
 - **Category** Leave blank (Will return Inactive and Management)
 - **Code** *STAS%*
- Step 5.** Click the **Find** icon to return the *STASFNEVTP*, *STASINEVTP*, *STASFNEVTP* and *STASINEVTP* application parameters.
- Step 6.** Enter or select the desired default value in the **Value** field for each parameter.
- This is an opportunity to select the asset initial and final event types that you just created as default application parameters values for the Personal Asset Provisioning feature.
- Step 7.** Double click in the **Value** field for the *STASFNEVTP* parameter and select the desired default final event type. In this example, it is *ISSUED FROM INACTIVE TO INVENTORY*.
- Step 8.** Double click in the **Value** field for the *STASINEVTP* parameter and select the desired default initial event type. In this example, it is *RETURNED FROM INVENTORY TO INACTIVE*.
- Step 9.** Double click in the **Value** field for the *STASFNEVTP* parameter and select the desired default initial event type. In this example, it is *RETURNED FROM INVENTORY TO INACTIVE*.
- Step 10.** Double click in the **Value** field for the *STASINEVTP* parameter and select the desired default initial event type. In this example, it is *ISSUED FROM INACTIVE TO INVENTORY*.
- Step 11.** Click the **Save** icon.

The default application parameter values for the Personal Asset Provisioning feature have now been set.

CREATE A NEW MANUFACTURER

The **Manufacturer** information is a key component of every catalog entry. As you purchase assets from new manufacturers you will need to keep your manufacturer records up-to-date to maintain accurate records within your catalog. For more information about catalog entries, see the Catalog Management chapter of the Sunflower Enterprise Administration Guide. For more information about setting up organizations, see the People and Organizations chapter of the Sunflower Enterprise Administration Guide. This is a task that System Administrators and Personal Asset Provisioning Mangers can perform.

Scenario: The following graphic illustrates how to create a record for a new manufacturer.

NAVIGATION

- Click Admin
- Click Organization
- Click Maintain Organizations

The screenshot displays the 'Maintain Organizations' interface. At the top, the title bar reads 'Maintain Organizations - sacr2030'. The main form area is titled 'Organizations' and contains several input fields: 'Name' (SHIRTS AND STUFF INC), 'Code' (SASI), 'Begin Date', 'End Date', 'Source', 'Reviewed?' (Y), 'Org Financial Type', and 'User Fields*'. Below the form, there are three tabs: 'Organization Structures', 'Contacts', and 'Enterprise Identifiers'. The 'Organization Structures' tab is selected, revealing a table with two columns: 'Organization Type' and 'Parent'. The first row of the table has 'MANUFACTURER' highlighted in the 'Organization Type' column.

Figure 7-6: The Maintain Organizations Screen

- Step 1.** Navigate to the **Maintain Organizations** screen.
- Step 2.** Enter the name of the organization in the **Name** field, of the **Organization** block. *Shirts and Stuff Inc.*
- Step 3.** Enter an alias or short name for the organization in the **Code** field. If the organization has no alias, leave this field blank. *SASI*
- Step 4.** Enter the date the organization becomes valid in the **Begin Date** field.
- Click the **List** icon to display a calendar.
 - If the organization is always valid, leave this field blank. Providing a **Begin Date** is optional.
- Step 5.** Enter the date the organization becomes invalid in the **End Date** field.
- Click the **List** icon to display a calendar.
 - Providing an **End Date** is optional. If the organization is always valid, leave this field blank. If a hard-set end date for an organization must be defined, use this field to enter that date. This will prevent the use of this organizations beyond the specified date.
- Step 6.** Enter *Y* if the organization's information has been reviewed and requires no further approval. Enter *N* if the organization's information has not been reviewed and requires further review by another person. (**Reviewed?** field)
- Step 7.** Enter information in the following fields as appropriate:
- **Org Financial Type** -- indicates the organization financial type's long name. Click the **List** icon for a list of names. Use if this organization is a financial organization and if so, what financial type.
 - **User Fields** -- indicates user-defined information for the organization. Click the **Edit** icon to enter information in this field.
 - **Organization Type** -- indicates the organization type's long name. Click the **List** icon for a list of organization types.
 - **Parent** -- indicates the organization's parent name. Click the **List** icon for a list of parent names.
- Step 8.** Click the **Save** icon to save the new organization.

Define additional organizations as required. After defining your organization structure, define your organization contacts.

CREATE ISSUE AND RETURN POINTS

A location is required to create an asset, and each location must have a site. A **Code** and **Description** are required when creating a **Site**. A site may also have additional details such as Buildings, Rooms, Vault, Shelf, and Bin etc. **Issue and Return Points** are locations that can be defined as a combination of Sites, Buildings, and Rooms. Sunflower Enterprise enables you to maintain locations to limit the selection to only those valid locations that exist within the Sunflower Enterprise database. Your Sunflower Enterprise System Administrator can create new locations as your business practices change.

The following examples will illustrate how to set up locations to support the Personal Asset Provisioning feature. Your business practices and policies will dictate exactly how to create these locations. For example, you might keep controlled and sensitive assets in a vault. You will want to set up the locations to reflect the location nomenclature of your organization.

NOTE: Sunflower Sentry validates locations at the **Site**, **Structure Level One** and **Structure Level Two** levels. **Structure Level Three** is a free form text entry that is not validated against a domain names list. In addition, if you need to validate locations at the folder, bin or drawer level etc., make sure they are defined at the **Level Two Structure** (or greater) level when defining your onsite locations. For example, **Site** could be a specific building or warehouse, **Structure Level One** could be a vault and **Structure Level Two** could be a drawer or file cabinet within a vault.

This section shows you how to set up an **Issue And Return Point** for Personal Asset Provisioning. Specifically, how to:

- “Maintain Issue and Return Point - Site Location” on page 514
- “Maintain Issue and Return Point - Building Location” on page 516
- “Maintain Issue and Return Point - Room Location” on page 518

MAINTAIN ISSUE AND RETURN POINT - SITE LOCATION

Use the **Maintain Sites** screen to create the *SAN DIEGO* site for the Issue and Return Point (IRP).

Scenario: The following graphic illustrates how to create a new issue and return Site.

NAVIGATION

- Click Admin
- Click Location
- Click Maintain Sites

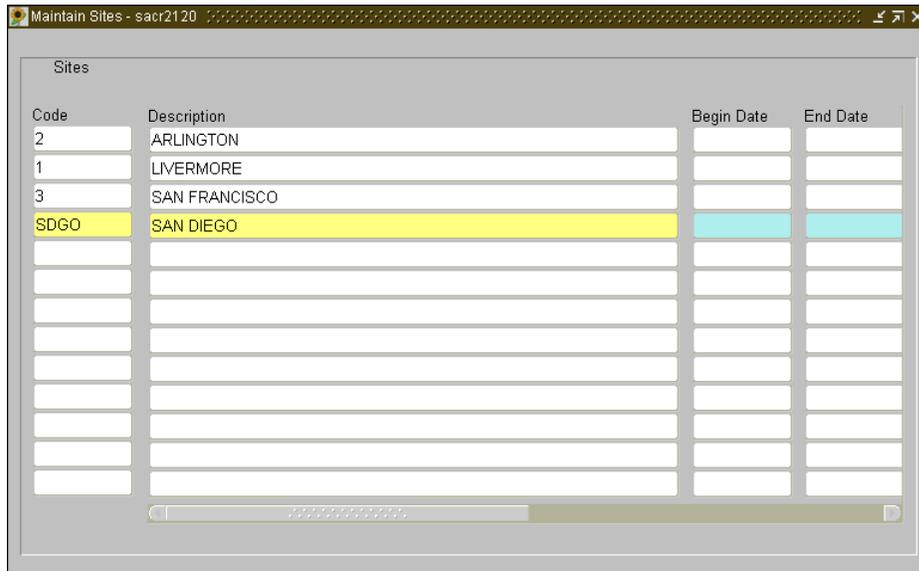


Figure 7-7: Creating a Site for an Issue and Return Point

- Step 1.** Navigate to the **Maintain Sites** screen.
- Step 2.** Enter the site's short name or code in the **Code** field. (e.g. *SDGO*)
- Step 3.** Enter the site's long name in the **Description** field. (e.g. *SAN DIEGO*)
- Step 4.** Enter the date that the site becomes active in the **Begin Date** field.
 - Click the **List** icon to display a calendar.
 - Providing a **Begin Date** is optional. If the site is always valid, leave this field blank.
- Step 5.** Enter the date that the site becomes inactive in the **End Date**.
 - Click the **List** icon to display a calendar.
 - Providing an **End Date** is optional. If the site is always valid, leave this field blank. If a hard-set end date for a site must be defined, use this field to enter that date. This will prevent the use of this site beyond the specified date.
- Step 6.** Enter the appropriate information in the address fields. This is optional. You can create sites without providing mailing address information.
- Step 7.** Click the **Save** icon to define the sites.

The next step is to define Level One Structures (Buildings).

NOTE: You cannot define Level One Structures (Buildings) before defining sites.

MAINTAIN ISSUE AND RETURN POINT - BUILDING LOCATION

Use the **Maintain Level One Structures (Buildings)** screen to create new buildings for the Issue and Return Point (IRP) on the *SAN DIEGO* site.

Scenario: The following graphic illustrates how to create new issue and return **building** locations.

NAVIGATION

- Click Admin
- Click Location
- Click Maintain Level One Structures (Buildings)

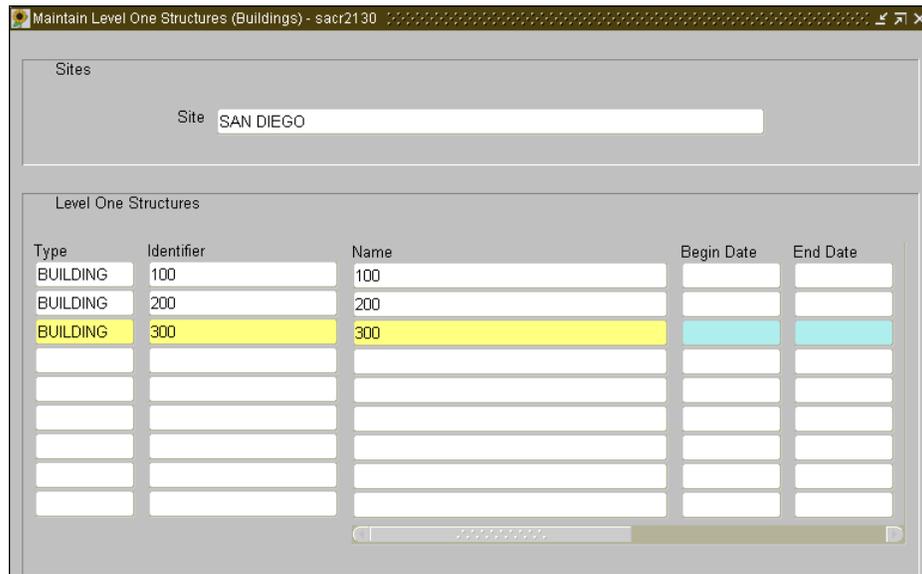


Figure 7-8: Defining Level One Structures (Buildings) for an IRP

Step 1. Navigate to the **Maintain Level One Structures (Buildings)** screen.

Step 2. Enter the name of the site and click the **Find** button to display the site that you are creating building information. (e.g. *SAN DIEGO*)

Step 3. Enter the structure type (for example, building or tower) in the **Type** field.

If you have not already created your Structure Level One Types, navigate to the **Maintain Domains** screen, retrieve the **Level One Structure Type** domain and create the new structure type.

Step 4. Enter the number assigned to the structure in the **Identifier** field. (e.g. *100*)

Step 5. Enter the name assigned to the structure in the **Name** field. (e.g. *Building 100*)

Step 6. Enter the date that the structure becomes active in the **Begin Date** field.

- Click the **List** icon to display a calendar.
- Providing a **Begin Date** is optional. If the structure is always valid, leave this field blank.

Step 7. Enter the date that the structure becomes inactive in the **End Date**.

- Click the **List** icon to display a calendar.
- Providing an **End Date** is optional. If the structure is always valid, leave this field blank. If a hard-set end date for a structure must be defined, use this field to enter that date. This will prevent the use of this structure beyond the specified date.

Step 8. Enter the appropriate information in the address fields. This is optional. You can create structures without providing mailing address information.

Step 9. Click the **Save** icon to define the structures.

The next step is to define Level Two Structures (Rooms).

NOTE: You cannot define Level Two Structures (Rooms) before defining Level One Structures (Buildings).

MAINTAIN ISSUE AND RETURN POINT - ROOM LOCATION

Use the **Maintain Level Two Structures (Rooms)** screen to create rooms for the Issue and Return Point (IRP) at the *SAN DIEGO* site, in *Building 100*.

Scenario: The following graphic illustrates how to create new issue and return **room** locations.

NAVIGATION

- Click Admin
- Click Location
- Click Maintain Level Two Structures (Rooms)

Type	Identifier	Name	Begin Date	End Date
ROOM	IRP-1	ISSUE AND RETURN POINT ONE		
ROOM	IRP-2	ISSUE AND RETURN POINT TWO		
ROOM	IRP-3	ISSUE AND RETURN POINT THREE		

Figure 7-9: Defining Rooms for Issue and Return Points

Step 1. Navigate to the **Maintain Level Two Structures (Rooms)** screen.

Step 2. Enter the name of the site and click the **Find** icon to display the site that you are creating room information. (e.g. *SAN DIEGO*)

Step 3. If the site has multiple buildings, use the up and down arrow keys to navigate to the appropriate building.(e.g. *Building 100*)

Step 4. Enter the structure level 2 type (for room, container or warehouse grid) in the **Type** field. (*ROOM*)

If you have not already created your Structure Level Two Types, navigate to the **Maintain Domains** screen, retrieve the **Level One Structure Type** domain and create the new structure type.

Step 5. Enter the number assigned to the structure in the **Identifier** field. (e.g. *IRP-1*)

Step 6. Enter the name assigned to the structure in the **Name** field. (*ISSUE AND RETURN POINT ONE*)

Step 7. Enter the date that the structure becomes active in the **Begin Date** field.

- Click the **List** icon to display a calendar.
- Providing a **Begin Date** is optional. If the structure is always valid, leave this field blank.

Step 8. Enter the date that the structure becomes inactive in the **End Date**.

- Click the **List** icon to display a calendar.
- Providing an **End Date** is optional. If the structure is always valid, leave this field blank. If a hard-set end date for a structure must be defined, use this field to enter that date. This will prevent the use of this structure beyond the specified date.

Step 9. Click the **Save** icon to define the structures.

Finally, navigate the **Maintain Locations** screen to provide the additional level of detail for the location with the Structure Level Three field if necessary.

CREATE CATALOG ENTRIES

The **Catalog** is a repository of information that contains the common model and manufacturer information for your assets. Similar to data warehousing concepts, you can think of the catalog as the dimensions that support the fact based transactional data. The catalog is used to capture and store this information once (dimensions) so that you can apply it to asset records (facts) as needed. The benefit of the catalog is that it provides data consistency because you are storing this data in a central repository that is utilized and applied globally. As a result, the catalog ensures that assets are consistently named and classified. The catalog contains the master list of catalog items that you will use to identify your assets.

The following examples will illustrate how to set up catalog entries to support the Personal Asset Provisioning feature. Your business practices and policies will dictate exactly how to create these catalog entries. For more information about maintaining catalog entries, see the Catalog Management chapter of the Sunflower Enterprise Administration Guide.

The **Maintain Catalog Entries** screen is accessible from any of the interest asset (Agreement, Management, Finance, Inactive and Excess) menus by users that have **Cataloger** role privileges. For example, you can assign the cataloger role to a user who is also an Inventory Clerk. As a result, this user can access the **Maintain Catalog Entries** screen from the Management module to create and maintain catalog entries in addition to the functions that they perform as an Inventory Clerk. Use the **Maintain Catalog Entries** screen to create new catalog entries and perform the following tasks:

- Modify existing catalog entries
- Create a new model for a manufacturer
- Create a new manufacturer for a catalog entry
- Update descriptions for a group of assets
- Add pictures to catalog entries

Scenario: The following graphic illustrates how to create a catalog entry for a manufacturer that was created earlier.

NAVIGATION

- Click Inactive
- Click Maintain Catalog Entries

Figure 7-10: Creating Catalog Entries for Personal Asset Provisioning

- Step 1.** Navigate to the **Maintain Catalog Entries** screen.
- Step 2.** Enter the name of the manufacturer with which the new model name is associated in the **Manufacturer** field.
To create a new manufacturer, place the cursor in the **Manufacturer** field and click the **Edit** icon.
- Step 3.** Enter the model number assigned by the manufacturer in the **Model Number** field.
- Step 4.** Enter your institution's name for the manufacturer/model pair in the **Official Name** field.
- Step 5.** Enter the model name in the **Model Name** field.
- Step 6.** Enter the asset type in the **Asset Type** field. Click the **List** icon for a list of asset types.

Step 7. Enter information in the following fields as appropriate:

- **Service Life (yrs)** -- displays the asset's default expected service life for the asset type chosen in step 6. To override the default service life, enter a new value in the **Override Service Life (yrs)** field.
- **Salvage Value %** -- displays the default expected salvage value, as a percentage of the asset's value, for the asset type chosen in step 6. To override the default salvage value percentage, enter a new value in the **Override Salvage Value %** field.
- **Federal Stock Classification** -- indicates federal stock classification information, if available.
- **Replacement Value** -- indicates the cost to replace the asset. Click the **List** icon for a list of classifications.
- **Stock Number** -- indicates the internal stock identification number.
- **Begin Date** -- indicates the date the catalog entry becomes valid. Click the **List** icon to display a calendar. If the catalog entry is always valid, you can leave this field blank.
- **End Date** -- indicates the date the catalog entry becomes invalid. Click the **List** icon to display a calendar. If the catalog entry is always valid, you can leave this field blank.
- **User Fields** -- indicates user-defined information for the catalog entry. Click the **Edit** icon to edit user-defined fields, if available. Enter the appropriate information in user fields and click the **Save** icon to return to the **Maintain Catalog Entries - asmn0020** screen.

Step 8. Click **Save** to add the new catalog entry. Create additional catalog entries as needed.

To add pictures, comments or attachments (optional), click the **Comment / Picture / Attachment** button at the bottom of the screen to display the **Capture Comments, Pictures and Attachments** screen.

NOTE: You must save the catalog entry before you can add a picture.

CREATE PROPERTY RECORDS

Before issuing assets, you must establish catalog entries and stock assets. Sunflower uses the Inactive module to manage the storage of Personal Asset Provisioning assets. To support the issuing of assets, Sunflower uses the Inventory Management (Mgmt) module to track the assets until they are returned to storage or consumed.

There are essentially two kinds of assets that Sunflower applications manage: **Identified** and **Commodity** assets.

- **Identified** assets, such as guns, computers, etc. are entered and tracked on an individual basis.
- **Commodity** assets, such as pants, shoes, belts, etc. are entered in groups based upon their stock number (100 pairs of shoes, 100 trousers, etc.) and tracked on an individual basis as they are checked out (issued) to an individual and checked in (returned) from the individual or never checked in but consumed.

CREATE IDENTIFIED PROPERTY RECORDS (ASSETS)

The **Maintain Inactive Assets** screen is integral to the Personal Asset Provisioning asset management team for the day-to-day management of assets. You will use this screen to:

- Create assets from scratch
- Modify asset details (e.g. custodian, user, and/or location changes)

Scenario: The following graphic illustrates how to create an inactive asset from scratch.

NAVIGATION

- Click **Inactive**
- Click **Maintain Inactive Assets**

The screenshot shows the 'Maintain Inactive Assets' window with the following data entered:

Field	Value
Identifier	GUN|
Existing Interest Asset	
Unique Name	
Catalog Identifier*	1292
Commodity	<input type="checkbox"/>
Manufacturer	SHIRTS AND STUFF INC
Official Name	PISTOL
Model	38 CAL PISTOL
Serial Number	
Initial Event	RECEIVE INACTIVE ASSET
Asset Value*	\$1,000.00
Acquisition Date	10/03/2005
Responsibility Date	10/03/2005
Asset Condition	1 UNUSED - GOOD
Effective Date	10/03/2005
Expected Return Date	
Inactive Type	CONTROLLED STORAGE
Flags*	SH
Duration (yrs)	
Available to others?	Y
Recharge Identifier	
Length	
Width	
Height	
Activity Status	STORAGE
Activity Type	
Manager	SUNFLOWER SYSTEMS
Owner	SUNFLOWER SYSTEMS
Steward	SUNFLOWER SYSTEMS
Rep	
Custodian	JODOE
Last Name*	DOE
First	JOHN
Mid	
User	
Last Name*	
First	
Mid	
Location*	SAN DIEGO _ BUILDING _ 100 _ ROOM _ JRP-1
Document*	
User Fields*	
Global User Fields*	

Figure 7-11: Creating Inactive Assets From Scratch

- Step 1.** Navigate to the **Maintain Inactive Assets** screen.
- Step 2.** Enter a new asset identifier in the **Identifier** field for the new inactive asset.
- Step 3.** Enter the core asset information accordingly. For more information, see Chapter 4, "Maintain Inactive Assets Field Terms" on page 341 and Chapter 4, "Maintain Inactive Assets - Page 2" on page 345.
- Step 4.** Enter the appropriate information in the following fields to add the inactive interest asset-specific information:
 - **Inactive Type** -- indicates what type of inactive status to assign to the asset.
 - **Available to others?** -- indicates if the asset can be used by others while in its inactive status.
 - **Length/Width/Height** -- indicates the asset's dimensions for storage purposes.
 - **Recharge Identifier** -- indicates the identifier assigned to the recharge general ledger account.
 - **Unique Requirements** -- indicates any unique storage requirements for the asset.
- Step 5.** Update the new inactive asset's information, as needed. (e.g. **Asset Condition** as used - good. **Location** updates etc.)
- Step 6.** Click the **Save** icon to save your inactive asset record.

NOTE: If you do not enter a value in a required field, Sunflower prompts you to do so.

CREATE COMMODITY PROPERTY RECORDS (ASSETS)

Some of the stock assets that your organization can issue from an **Issue and Return Location** may be commodity assets. For example, an organization may issue uniforms from a central location for personnel. There can be different sizes and pieces (Shirt, pants, shoes, cap, belt, etc.) that make up the uniforms. The items are ordered in bulk and they may be consumed (not returned). The Personal Asset Provisioning feature can help you manage these items as commodity assets to help keep ample supplies in stock and to determine who has what and how many items.

Scenario: The following graphic illustrates how to create an asset for 100 pairs of Shoes at \$50.00 per pair.

NAVIGATION

- Click Inactive
- Click Maintain Inactive Assets

The screenshot shows a software window titled 'Maintain Inactive Assets - asin2010 (Page 1 of 3)'. The main form is titled 'Inactive Assets' and contains the following fields and values:

- Identifier: SHOES-XX
- Unique Name: (empty)
- Catalog Identifier*: 1291
- Manufacturer: SHIRTS AND STUFF INC
- Official Name: SHOES
- Serial Number: (empty)
- Initial Event: RECEIVE INACTIVE ASSET
- Asset Value: \$4,000.00
- Asset Condition: 1 UNUSED - GOOD
- Inactive Type: CONTROLLED STORAGE
- Recharge Identifier: (empty)
- Unique Requirements: (empty)
- Activity Status: STORAGE
- Manager: SUNFLOWER SYSTEMS
- Steward: SUNFLOWER SYSTEMS
- Custodian: JODOE
- User: (empty)
- Location*: SAN DIEGO BUILDING 100 ROOM IRP-1
- Document*: (empty)
- User Fields*: (empty)
- Global User Fields*: (empty)

Additional fields on the right side of the form include:

- Type: Existing Interest Asset
- Type: (empty)
- Identifier: (empty)
- Parents: 0
- Children: 0
- C/A/P: C
- Model: SHOES 10 MENS
- Model Name: (empty)
- Drawing No: (empty)
- User Fields*: (empty)
- Acquisition Date: 10/04/2005
- Responsibility Date: 10/04/2005
- Effective Date: 10/12/2005
- Expected Return Date: (empty)
- Flags*: (empty)
- Duration (yrs): (empty)
- Available to others?: N
- Length: (empty)
- Width: (empty)
- Height: (empty)

A 'Commodity Information' pop-up window is visible in the bottom right corner, showing:

- Quantity: 100
- Unit of Measure: PAIR
- Long Description: SHOES, MENS SIZE 10

At the bottom of the main window, there are buttons for 'Page 2' and 'Commodity'.

Figure 7-12: Creating Commodity Inactive Asset Records

Step 1. Navigate to the **Maintain Inactive Assets** screen.

Step 2. Enter a new asset identifier in the **Identifier** field for the inactive asset. (e.g. *SHOES-XX*)

Step 3. Enter the core asset information accordingly. In this instance, you must check the **Commodity** checkbox to create a commodity asset. For more information, see Chapter 4, "Maintain Inactive Assets Field Terms" on page 341 and Chapter 4, "Maintain Inactive Assets - Page 2" on page 345.

NOTE: You do not need to double-click the **Asset Value** field to enter the asset value for the commodity asset since you activated the **Commodity** checkbox - it is no longer a complex value.

Value = Cost "x" Quantity. (\$40.00 x 100 = \$4,000)

Do not enter \$, commas, or periods. 4000 is the same as \$4,000.00.

Step 4. Enter the appropriate information in the following fields to add the inactive interest asset-specific information:

- **Inactive Type** -- indicates what type of inactive status to assign to the asset. (e.g. *Controlled Storage*)
- **Available to others?** -- indicates if the asset can be used by others while in its inactive status.
- **Length/Width/Height** -- indicates the asset's dimensions for storage purposes.
- **Recharge Identifier** -- indicates the identifier assigned to the recharge general ledger account.
- **Unique Requirements** -- indicates any unique storage requirements for the asset.

Step 5. Update the new inactive asset's information, as needed. (e.g. **Asset Condition** as *USED - GOOD*. **Location** updates etc.)

Step 6. Click the **Save** icon to save your inactive asset record.

If you do not enter a value in a required field, Sunflower prompts you to do so.

PERSONAL ASSET PROVISIONING

Now that the setup of the Personal Asset Provisioning feature is complete, you can begin to manage your stock assets with the Stock Asset Management self-service html transaction pages.

The following transactions can be performed by a Manager or Clerk:

- Record, track, and modify identified and commodity asset information
- Issue assets
- Return asset
- Exchange assets
- Consolidate assets as required
- Retire assets
- Create reports

The following table provides the Personal Asset Provisioning self-service html transaction pages that are available from the **Stock Asset Management** main menu.

MENU FUNCTION	DESCRIPTION/EXPLANATION
Maintain Stock Assets	Used to issue, return, and exchange stockroom assets.
Consolidate Commodity Stock Assets	Used to consolidate similar items from various locations to a single location.

STOCK ASSET TRANSACTIONS

Stock asset transactions include:

- “Select an Issue and Return Point (Location)” on page 530
- “Issue Assets” on page 531
- “Return Stock Assets” on page 536
- “Exchange Assets” on page 539
- “Identify Lost, Stolen, or Damaged Assets” on page 542

Scenario: The following graphic illustrates how to access to the Personal Asset Provisioning feature Stock Asset Management Production page.

NOTE: Your login (Sunflower application roles) determines the links and therefore the self-service html transaction pages that you can access.

NAVIGATION

- Sunflower Enterprise - Production

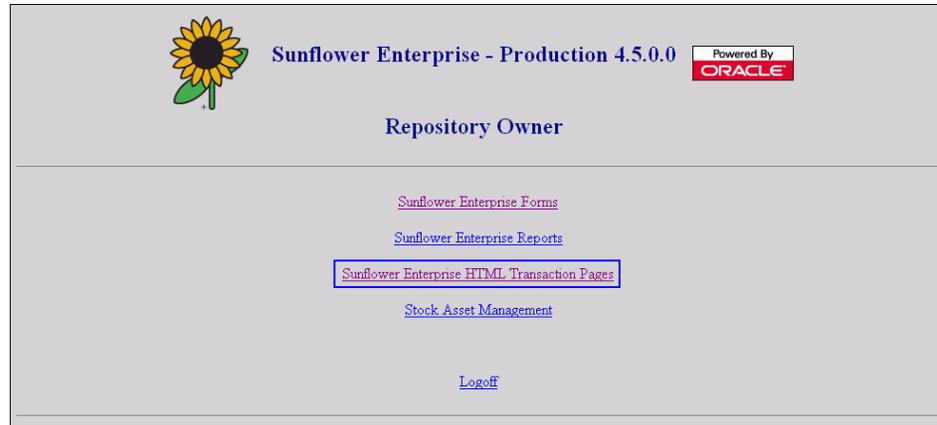


Figure 7-13: Sunflower Enterprise Production Screen

Step 1. Navigate to the **Sunflower Enterprise - Production** page.

Step 2. Click the **Stock Asset Management** link to access the **Main Menu** page.

NAVIGATION

- Sunflower Enterprise - Production
- Click Maintain Stock Assets



Figure 7-14: Accessing the Personal Asset Provisioning Feature

SELECT AN ISSUE AND RETURN POINT (LOCATION)

The first step to issuing, returning or exchanging stock assets is to select an **Issue and Return Point (IRP)**. The IRPs were created earlier with the **Maintain Locations** screen. For more information about creating IRPs, see “Create Issue and Return Points” on page 513.

Scenario: The following graphic illustrates how to access the Maintain Stock Assets - Select Location page, where you enter the Site and Building locations from which you are issuing stock assets.

NAVIGATION

- Sunflower Enterprise - Production
- Click Maintain Stock Assets

Figure 7-15: Selecting an Issue and Return Point

Step 1. Navigate to the **Maintain Stock Assets - Select Location** self-service html transaction page.

Step 2. Select the **Site** from the drop down box for your Issue and Return Point (IRP).

Site is a required field. The **Structure Level 1 (Building)** field is optional. If left blank, you can choose any of the buildings associated with the selected site. If populated, you must use that particular building. The **Site** you select controls the list of available **Buildings** and the **Building** you select controls the list of available **Rooms** (within that building) that you select later in the issuing process.

Step 3. Click the **Continue** button to complete the stock asset issuance process.

ISSUE ASSETS

Your organization may have issue and return points that issue stock assets to personnel to perform their jobs. The Personal Asset Provisioning feature enables you to issue stock assets and automatically update the total assets available for issue from the Issue and Return Point (IRP). You may issue assets individually or in groups; however, only to one person (Custodian) at a time.

Scenario: The following graphic illustrates how to issue two pairs of shoes, two trousers and one 0.38 caliber pistol to John Smith.

NAVIGATION

- Click Stock Asset Management
- Enter the Issue and Return Point location.
- Click the Continue button

Maintain Stock Assets

Location: SAN DIEGO_BUILDING_100

Custodian: Identifier: SMXX Name: SMITH JOHN

Actions

Save Add More Rows Refresh Cancel

Stock Assets

[Bottom](#)

Stock Asset	Official Name	Qty	Action	Location (Qty)	Qty
Show All	Hide	Issued		Hide	
SKU-SH10MN-	SHOES XX		Issue	BUILDING_100_ROOM_IRP-1 (100)	2
SKU-SH34MNE	TROUSER XX		Issue	BUILDING_100_ROOM_IRP-1 (200)	2
GUN-1-XX	PISTOL XX		Issue	BUILDING_100_ROOM_IRP-1 (1)	1
			Issue	Please Select	
			Issue	Please Select	
			Issue	Please Select	
			Issue	Please Select	
			Issue	Please Select	
			Issue	Please Select	
			Issue	Please Select	

[Top](#)

Figure 7-16: Issuing Stock Assets to a Custodian

- Step 1.** Navigate to the **Maintain Stock Assets** self-service html transaction page.
- Step 2.** Enter the Issue and Return Point (IRP) location in the **Site** and **Building** fields.
- If an IRP location is available for selection, use the Maintain Locations screen to create the desired IRP. For more information about creating IRPs, see “Create Issue and Return Points” on page 513.
 - Alternatively, you can click the **Add Return Locations** button to open the **Maintain Locations** self-service html transaction page and create an IRP location from this point in the application.
- Step 3.** Select the custodian (individual) for which you are issuing stock assets in the **Custodian** field.
- Step 4.** Click the **Show All** button to view all of the columns in the **Stock Assets** block.
- Step 5.** Enter the **Stock Number** directly or use the **New Stock Asset List** button (located within the **Stock Asset** column) to open the **Stock Asset Query Criteria** window. See “Stock Asset Query Criteria Page” on page 533 to see an illustration of this page.

NOTE: If the stock asset is a commodity, the stock number is the value assigned at the time that the catalog entry was created for the commodity asset. For example, Shoes were defined as inactive commodity asset. The catalog entry for shoes assigned them the stock number, *SKU-SH10MN-XX*, which is the stock number to reference here when assigning shoes to the custodian. Trousers were setup as commodity assets so the stock number to use when assigning trousers is the one defined by its catalog entry. The pistol for this example was not assigned as a commodity asset and therefore uses the inactive asset identifier, *GUN-1-XX*, assigned with the **Maintain Inactive Asset** screen.

- Step 6.** Enter the number of items that you are issuing to the custodian for each stock asset in the **Qty** field.
- The **Qty** field is inactive (grayed out) if the stock asset is an identified asset (not a commodity).
 - You can only issue identified assets one at a time.
- Step 7.** Select the appropriate action (*Issue*, *Return* or *Exchange*) with the **Action** drop down box. This list of values expands based upon the available actions.
- Step 8.** Click the **Add More Rows** button if you need to add more rows to accommodate the transaction.
- Step 9.** Click the **Save** button to execute the stock asset transaction.

Alternatively, click the **Cancel** button if you want to cancel the transaction.

NOTE: The view changes after saving. A **Status** column has been added, **Qty Issued** is now populated and **Location (Qty)** modified. Click the **Location (Qty)** drop-down arrow and view the updated inventory information. The **Status** column displays *Issue Ok* if the the transaction was successful. See “Maintain Stock Assets Page After Issuing Stock Assets” on page 534 to see an illustration of this page.

STOCK ASSET QUERY CRITERIA PAGE

The following example illustrates the **Stock Asset Query Criteria** page after executing a query.

Query Criteria

Location	SAN DIEGO ▼ BUILDING ▼ 100 ⬇ ROOM ▼ ⬇ Structure Level 3 <input style="width: 100%;" type="text"/>
Manufacturer	SHIRTS AND STUFF INC ⬇
Model	<input style="width: 100%;" type="text"/>
Official Name	<input style="width: 100%;" type="text"/>
Stock Number	<input style="width: 100%;" type="text"/>

Actions

Query Results

Bottom

Select	Stock Asset	Official Name	Manufacturer	Model	Location (Qty)
<input type="radio"/>	GUN1	PISTOL	SHIRTS AND STUFF INC	38 CAL PISTOL	SAN DIEGO__BUILDING__100__ROOM__IRP-1 (1) ▼
<input type="radio"/>	GUN2	PISTOL	SHIRTS AND STUFF INC	38 CAL PISTOL	SAN DIEGO__BUILDING__100__ROOM__IRP-1 (1) ▼
<input type="radio"/>	GUN3	PISTOL	SHIRTS AND STUFF INC	38 CAL PISTOL	SAN DIEGO__BUILDING__100__ROOM__IRP-1 (1) ▼
<input type="radio"/>	SKU-SH10MN	SHOES	SHIRTS AND STUFF INC	SHOES 10 MENS	SAN DIEGO__BUILDING__100__ROOM__IRP-1 (100) ▼
<input type="radio"/>	SKU-SH34MNBK	TROUSER	SHIRTS AND STUFF INC	BLACK 34 MENS	SAN DIEGO__BUILDING__100__ROOM__IRP-1 (100) ▼

Figure 7-17: The Stock Asset Query Criteria Screen

MAINTAIN STOCK ASSETS PAGE AFTER ISSUING STOCK ASSETS

The following example illustrates the **Maintain Stock Assets** page after saving the transaction.

Maintain Stock Assets

Location

Custodian ↓

Actions

Stock Assets

Bottom

Status	Stock Asset <small>Show All</small>	Official Name <small>Hide</small>	Manufacturer <small>Hide</small>	Model <small>Hide</small>	Qty Issued	Action	Location (Qty) <small>Hide</small>	Qty
Issue: OK	GUN1	PISTOL	SHIRTS AND STUFF INC	38 CAL PISTOL	1	Please Select ▾	Please Select ▾	1
Issue: OK	SKU-SH10MN	SHOES	SHIRTS AND STUFF INC	SHOES 10 MENS	2	Please Select ▾	Please Select ▾	2
Issue: OK	SKU-SH34MNBK	TROUSER	SHIRTS AND STUFF INC	BLACK 34 MENS	2	Please Select ▾	Please Select ▾	2
	<input type="text" value=""/>					Issue ▾	Please Select ▾	<input type="text" value=""/>
	<input type="text" value=""/>					Issue ▾	Please Select ▾	<input type="text" value=""/>

Figure 7-18: Results After Saving

Step 10. Click the **Cancel** button to exit back to the **Select Location** page.

NOTE: Instead of clicking the **Cancel** button and returning to the **Select Location** page, you can select and clear the **Identifier** field to perform another transaction from the same **IRP** location for another custodian.

NOTE: When a commodity asset is issued, its inventory is decremented for quantity and value. When a commodity asset's quantity and value reach zero, then it is retired.

RETURN AND EXCHANGE STOCK ASSETS

Here is an overview for transactions that can occur when returning or exchanging identified and commodity assets with the Personal Asset Provisioning feature and how these transactions are typically handled.

When returning a commodity assets from an Issue and Return Point:

- When a commodity asset exists at an issue and return point (IRP), its quantity and value is increased accordingly.
- When a commodity asset is returned to an IRP where that commodity asset does not exist, a new commodity asset is created at the designated IRP with the returned quantity, value and designated stock number.

When returning identified assets to an Issue and Return Point:

- The inventory asset is retired.
- A new inactive asset is created.
- The location of the base asset is updated to reflect the return point location.
- The issued custodian's name is removed from the base asset.

When exchanging assets to an Issue and Return Point:

- If the assets exchanged have the same stock number, the quantity issued and quantity on hand remain the same.
- If the assets being exchanged have different stock numbers, then the returning asset is treated like a return and the desired asset is treated like a new issuance.

How to manage lost, stolen, or damaged assets:

- When an issued asset (inventory asset interest type) is declared as **Lost**, **Stolen**, or **Damaged**, the **Location (Qty)** field becomes inactive. The inactive commodity asset's quantity and value remains unchanged, and the issued inventory commodity asset's quantity and value is decreased.

RETURN STOCK ASSETS

Assets can be returned when they are no longer needed to perform a task or they need to be exchanged for a different item. The Personal Asset Provisioning feature enables you to return assets to stock and automatically update the total assets available for issue from the Issue and Return Point (IRP).

Scenario: The following graphic illustrates how to handle a return from John Smith for a pair of shoes and In addition, John Smith is issued two additional trousers.

NAVIGATION

- Click Stock Asset Management
- Click the Continue button

Maintain Stock Assets

Location

Custodian ↓

Actions

Stock Assets

Bottom

Stock Asset Show #	Official Name Hide	Qty Issued	Action	Location (Qty) Hide	Qty
GUN1	PISTOL	1	Please Select	Please Select	1
SKU-SH10MN	SHOES	2	Return	BUILDING_100_ROOM_IRP-1 (98)	1
SKU-SH34MNBK	TROUSER	2	Issue	BUILDING_100_ROOM_IRP-1 (98)	2
↓			Issue	Please Select	
↓			Issue	Please Select	

Figure 7-19: Returning Stock Assets

Step 1. Navigate to the **Maintain Stock Assets** self-service html transaction page.

Step 2. The location is determined by the value established with the **Select Location** self-service html transaction page. (e.g. *SAN DIEGO_BUILDING_100*)

NOTE: The **Add Return Location** button enables you to manually add or override the **Location (Qty)** field if an asset is being returned to an IRP location other than those listed (creating a room “on-the-fly”). However, you cannot create buildings or sites on the fly. They must be created with the **Maintain Locations** screen. For more information about creating IRPs, see “Create Issue and Return Points” on page 513.

Step 3. Select the custodian (individual) for which you are issuing or receiving stock assets in the **Custodian** field. (e.g. *SMITH JOHN*) Selecting a custodian displays all the assets currently assigned to the selected individual.

Step 4. Click the **Show All** button to view all of the columns in the **Stock Assets** block.

Step 5. Enter the **Stock Number** directly or use the **New Stock Asset List** button to open the **Stock Asset Query Criteria** window. (e.g. *SKU-SH10MN*)

NOTE: If the stock asset is a commodity, the stock number is the value assigned at the time that the catalog entry was created for the commodity asset. For example, Shoes were defined as inactive commodity asset. The catalog entry for shoes assigned them the stock number, *SKU-SH10MN*, which is the stock number to reference here when assigning shoes to the custodian. Trousers were setup as commodity assets so the stock number to use when assigning trousers is the one defined by its catalog entry. The pistol for this example was not assigned as a commodity asset and therefore uses the Inactive Asset Identifier (*GUN1*) assigned with the **Maintain Inactive Asset** screen.

Step 6. Enter the number of items that you are issuing to or receiving from the custodian for each stock asset in the **Qty** field.

NOTE: The **Qty** field is inactive (grayed out) if the stock asset is an identified asset (not a commodity). You can only issue identified assets one at a time. A separate row for each identified asset must be created to accommodate the issuance of multiple identified assets since each identified asset has its own unique asset identifier.

Step 7. Select the appropriate action (*Issue, Return or Exchange*) with the **Action** drop down box. The list of values expands based upon the available actions. (e.g. returning 1 pair of shoes and issuing 2 trousers.)

Step 8. Click the **Save** button to execute the stock asset transaction.

NOTE: The view changes after saving. A **Status** column has been added, **Qty Issued** is now populated and **Location (Qty)** modified. Click the **Location (Qty)** drop-down arrow and view the updated inventory information. The **Status** column displays *Issue Ok* if the transaction was successful.

MAINTAIN STOCK ASSETS PAGE AFTER THE RETURN

The following graphic provides a view of the **Maintain Stock Assets** page after saving the return and issue transactions. Notice the change of quantity to the shoes and trousers issued to this custodian. The shoes issued to John Smith decreased to one pair from two and the trousers issued to John Smith increase from two trousers to four trousers.

Maintain Stock Assets

Location:

Custodian Identifier: Name: ↓

Actions

Stock Assets

Bottom

Status	Stock Asset <small>Show All</small>	Official Name <small>Hide</small>	Qty <small>Issued</small>	Action	Location (Qty) <small>Hide</small>	Qty
	GUN1	PISTOL	1	Please Select ▾	Please Select ▾	<input type="text" value="1"/>
Return: OK	SKU-SH10MN	SHOES	1	Please Select ▾	Please Select ▾	<input type="text"/>
Issue: OK	SKU-SH34MNBK	TROUSER	4	Please Select ▾	Please Select ▾	<input type="text"/>
	<input type="text" value=""/> ↓			Issue ▾	Please Select ▾	<input type="text"/>
	<input type="text" value=""/> ↓			Issue ▾	Please Select ▾	<input type="text"/>

Figure 7-20: Results of the Return and Issue

Step 9. Click the **Cancel** button to exit back to the **Select Location** page.

NOTE: Instead of clicking the **Cancel** button and returning to the **Select Location** page, you can select and clear the **Identifier** field to perform another transaction from the same **IRP** location for another custodian.

NOTE: When a commodity asset is issued, its inventory is decremented for quantity and value. When a commodity asset's quantity and value reach zero, it is retired.

EXCHANGE ASSETS

Assets may also be exchanged, either for another asset of the same type (exact stock number replacement) or for a different asset. The Personal Asset Provisioning feature enables you to exchange assets, automatically updating the total assets issued (inventory assets) and available for issue (inactive assets). The exchange of an asset is an issue and a return combined into a single step or operation.

Scenario: The following graphic illustrates how to perform an exchange for John Smith.

NAVIGATION

- Click Stock Asset Management
- Click the Continue button

Maintain Stock Assets

Location: SAN DIEGO_BUILDING_100

Custodian Identifier: SMXX Name: SMITH JOHN

Actions

Save Add More Rows Add Return Location Refresh Cancel

Stock Assets

Bottom

Stock Asset <small>Show All</small>	Qty Issued	Action	Location (Qty) <small>Hide</small>	Qty	Exchange With	Exchange Location (Qty)
GUN1	1	Please Select	Please Select	1		
SKU-SH10MN	1	Please Select	Please Select			
SKU-SH34MNEK	4	Exchange	BUILDING_100_ROOM_IRP-1 (96)	1	SKU-SH34MNE	BUILDING_100_ROOM_IRP-1 (96)
		Issue	Please Select			
		Issue	Please Select			

Figure 7-21: Exchanging Stock Assets

- Step 1.** Navigate to the **Maintain Stock Assets** self-service html transaction page.
- Step 2.** The location is determined by the value established with the **Select Location** self-service html transaction page. (e.g. *SAN DIEGO_BUILDING_100*)

NOTE: The **Add Return Location** button enables you to manually add or override the **Location (Qty)** field if an asset is being returned to an IRP location other than those listed (creating a room “on-the-fly”). However, you cannot create buildings or sites on the fly. They must be created with the **Maintain Locations** screen. For more information about creating IRPs, see “Create Issue and Return Points” on page 513.

- Step 3.** Select the custodian (individual) for which you are exchanging stock assets in the **Custodian** field. (e.g. *SMITH JOHN*) Selecting a custodian displays all the assets currently assigned to the selected individual.
- Step 4.** Click the **Show All** button to view all of the columns in the **Stock Assets** block.
- Step 5.** Select the appropriate action (e.g. *Issue, Return* or *Exchange*) with the **Action** drop down box. The list of values expands based upon the available actions. In this example, an *Exchange* for the stock asset, *SKU-SH34MNBK* (Trousers).
- Step 6.** Select the Issue and Return Point (IRP) to which you are returning an asset for exchange in the **Location (Qty)** field. The current on-hand quantity for the selected IRP displays inside the parentheses.
- Step 7.** Enter the quantity of assets that are being exchanged in the **Qty** field.
- Step 8.** Enter the stock number of the asset that you want to use to replace the currently issued asset in the **Exchange With** field.

Alternatively, you can use the **Stock Asset Exchange With List** button to open the **Stock Asset Query** page and search for a stock asset that you want to issue in exchange for the returning stock asset.

- Step 9.** Use the drop-down list to select the IRP location of the stock asset that will be issued in exchange for the returned asset. The current on-hand quantity for the selected IRP displays inside the parentheses.
- Step 10.** Click the **Save** button to execute the exchange.

NOTE: The view changes after saving. A **Status** column has been added, **Qty Issued** is now populated and **Location (Qty)** modified. Click the **Location (Qty)** drop-down arrow and view the updated inventory information. The **Status** column displays *Exchange Ok* if the transaction was successful.

MAINTAIN STOCK ASSETS PAGE AFTER THE EXCHANGE

The following graphic provides a view of the **Maintain Stock Assets** page after the exchange transaction.

Maintain Stock Assets

Location: SAN DIEGO__BUILDING__100

Custodian Identifier: SMXX Name: SMITH JOHN ↓

Actions
[Save]
Add More Rows
Add Return Location
Refresh
Cancel

Stock Assets

Bottom

Status	Stock Asset <small>Show All</small>	Qty Issued	Action	Location (Qty) <small>Hide</small>	Qty
	GUN1	1	Please Select ↓	Please Select ↓	1
	SKU-SH10MN	1	Please Select ↓	Please Select ↓	
Exchange: OK	SKU-SH34MNBK	4	Please Select ↓	Please Select ↓	
	<input style="width: 80%;" type="text"/> ↓		Issue ↓	Please Select ↓	
	<input style="width: 80%;" type="text"/> ↓		Issue ↓	Please Select ↓	

Figure 7-22: Results of the Exchange

Step 11. Click the **Cancel** button to exit back to the **Select Location** page.

NOTE: Instead of clicking the **Cancel** button and returning to the **Select Location** page, you can select and clear the **Identifier** field to perform another transaction from the same **IRP** location for another custodian.

NOTE: When a commodity asset is issued, its inventory is decremented for quantity and value. When a commodity asset's quantity and value reach zero, it is retired.

IDENTIFY LOST, STOLEN, OR DAMAGED ASSETS

Occasionally, assets are lost, stolen or damaged. The Personal Asset Provisioning feature enables you to update the status of a lost, stolen or damaged stock asset that has been issued to an individual (Custodian) to reflect these events. This process updates the total assets assigned to an individual.

NOTE: You should follow the guidelines, business policies and practices of your organizations when in dealing with lost, stolen or damaged items.

Scenario: The following graphic illustrates how to update the loss of two trousers issued to John Smith.

NAVIGATION

- Click Stock Asset Management
- Click the Continue button

Stock Asset	Official Name	Qty Issued	Action	Location (Qty)	Qty
GUN1	PISTOL	1	Please Select	Please Select	1
SKU-SH10MN	SHOES	1	Please Select	Please Select	
SKU-SH34MNEK	TROUSER	14	Lost	Please Select	2
			Issue	Please Select	
			Issue	Please Select	

Figure 7-23: Identifying Lost, Stolen or Damaged Property

- Step 1.** Navigate to the **Maintain Stock Assets** self-service html transaction page.
- Step 2.** The location is determined by the value established with the **Select Location** self-service html transaction page. (e.g. *SAN DIEGO_BUILDING_100*)

NOTE: The **Add Return Location** button enables you to manually add or override the **Location (Qty)** field if an asset is being returned to an IRP location other than those listed (creating a room “on-the-fly”). However, you cannot create buildings or sites on the fly. They must be created with the **Maintain Locations** screen. For more information about creating IRPs, see “Create Issue and Return Points” on page 513.

- Step 3.** Select the **Custodian** (individual) to indicate the items that were lost, stolen, or damaged. Selecting a custodian displays all the assets currently assigned to the selected individual.
- Step 4.** Click the **Show All** button to view all of the columns in the **Stock Assets** block.
- Step 5.** Select the line item containing the issued asset identified as lost, stolen, or damaged. (e.g. *SKU-SH34MNBK*, trousers)
- Step 6.** Select the appropriate action (e.g. *Lost*, *Stolen*, or *Damaged*) with the **Action** drop down box. The list of values expands based upon the available actions. In this example, *Lost* for the stock asset, *SKU-SH34MNBK* (Trousers).
- Step 7.** The **Location (Qty)** field will automatically gray out for lost, stolen, and damaged items since they are not being returned for re-issue.
- Step 8.** Enter the quantity being identified as *Lost*, *Stolen*, or *Damaged*.
- Step 9.** Click the **Save** button to change the status of the issued asset to *Lost*.

NOTE: The view changes after saving. A **Status** column has been added, **Qty Issued** is now decremented by the amount indicated as lost. The **Status** column displays *Lost Ok* if the transaction was successful.

MAINTAIN STOCK ASSETS PAGE AFTER DECLARING A LOST ASSET

The following graphic provides a view of the **Maintain Stock Assets** page after the lost transaction.

Maintain Stock Assets

Show Properties

Location	SAN DIEGO_BUILDING_100		
Custodian	Identifier	SMXX	Name
			SMITH JOHN

Actions

Show Properties

Stock Assets

Show Properties

Bottom

Status	Stock Asset	Official Name	Qty	Action	Location (Qty)	Qty
	<small>Show All</small>	<small>Hide</small>	<small>Issued</small>		<small>Hide</small>	
	GUN1	PISTOL	1	Please Select	Please Select	1
	SKU-SH10MN	SHOES	2	Please Select	Please Select	
Lost OK	SKU-SH34MNBK	TROUSERS	4	Please Select	Please Select	
				Issue	Please Select	

Figure 7-24: Results of the Exchange

Step 10. Click the **Cancel** button to exit back to the **Select Location** page.

NOTE: Instead of clicking the **Cancel** button and returning to the **Select Location** page, you can select and clear the **Identifier** field to perform another transaction from the same **IRP** location for another custodian.

NOTE: When a commodity asset is issued, its inventory is decremented for quantity and value. When a commodity asset's quantity and value reach zero, it is retired.

CONSOLIDATE COMMODITY STOCK ASSETS

The Personal Asset Provisioning feature enables you to consolidate commodity assets from different locations. For example, this feature can be used to consolidate assets to the Issue and Return Point (IRP) location or locations that will continue to carry the commodity assets. You can also use this feature to consolidate assets that are being stored at locations other than the ones from which they were issued, allowing the original issuing location to retain control of a particular asset for issue.

Scenario: The following graphic illustrates how to consolidate all men shoes (size 10) to San Diego, Building 100, Room IRP-1.

NAVIGATION

- Click the **Stock Asset Management** link
- Click the **Consolidate Commodity Stock Assets** link
- Click the **Continue** button

Consolidate Commodity Stock Assets

Location	SAN DIEGO__BUILDING__100
Stock Number	SKU-SH10MN ↓
Official Name	SHOES
Manufacturer	SHIRTS AND STUFF INC
Model	SHOES 10 MENS

Actions

Stock Assets

Bottom

Consolidate To	Consolidate From	Location	Quantity
<input type="radio"/>	<input type="checkbox"/>	BUILDING__100__ROOM__IRP-1	99
<input type="radio"/>	<input checked="" type="checkbox"/>	BUILDING__100__ROOM__IRP-2	100
<input type="radio"/>	<input checked="" type="checkbox"/>	BUILDING__100__ROOM__IRP-3	100

Top

Figure 7-25: Consolidating Assets

- Step 1.** Navigate to the **Consolidate Commodity Stock Assets** self-service html transaction page.
- Step 2.** The location is determined by the value established with the **Select Location** self-service html transaction page. (e.g. *SAN DIEGO_BUILDING_100*)
- Step 3.** Enter the **Stock Number** directly or use the **Stock Number List** button to open the **Stock Asset Query Criteria** window. Tabbing out auto-populates the remaining fields and displays all of the Stock Asset locations meeting the stock number criteria.
- Step 4.** Select the single location that you want to consolidate all assets to by selecting the designated **Consolidate To** radio button adjacent to the desired location.
- Step 5.** Select the locations that you want to consolidate all assets from by selecting the designated **Consolidate From** radio buttons adjacent to the desired locations.
- Step 6.** Click the **Consolidate** button to commit the transaction.

PERFORM ASSET SEARCH

The **Asset Search** screen is a very helpful tool for finding assets in various stages of the asset lifecycle. For example, you can use the **Asset Search** screen to locate stock assets and the availability of those stock assets (e.g. different sizes and colors).

Scenario: The following graphic illustrates how to use the **Asset Search** screen to discover inactive (stock) assets that are available for issue.

NAVIGATION

- Click Inactive
- Click Asset Search

The screenshot shows the 'Asset Search' application window. The 'Search Criteria' section includes fields for Manufacturer (SH%), Official Name, Serial Number, Asset Value, Minimum Acquisition Date, Model, Model Name, Asset Type, and FSC. Below these fields are checkboxes for 'Agreement Assets', 'Excess Assets', 'Financial Assets', 'Inactive Assets' (which is checked), 'Inventory Assets', and 'Subset Assets'. The 'Assets' table below lists the following data:

Assets Identifier	Manufacturer	Model	Official Name
INA GUN	SHIRTS AND STUFF INC	38 CAL PISTOL	PISTOL
INA SHOES-XX	SHIRTS AND STUFF INC	SHOES, 10 MENS	SHOES
INA TROUSERS-XX	SHIRTS AND STUFF INC	BLACK, 34 MENS	TROUSERS

A 'Report' button is located at the bottom center of the window.

Figure 7-26: Using the Asset Search Screen to Find Stock Assets

Step 1. Navigate to the **Asset Search** screen.

The **Asset Search** screen is available from the Agreement, Management, Finance, Inactive and Excess modules.

Step 2. Check the **Inactive Asset** checkbox to limit your asset search to inactive assets. Specify at least one criteria in the **Search Criteria** block. In this case, **SH%** is the selection for the **Manufacturer** criteria. (e.g. **SHIRTS AND STUFF INC**)

Step 3. Click the **Find** icon to return the results of your **Asset Search** criteria.

Step 4. Optionally, click the **Report** button at the bottom of the screen to generate a printable report of your online search results.

1. The **Asset Search** report parameters page displays with pre-populated search criteria specified with the **Asset Search** screen. You can further refine the search criteria)
2. Click the **Submit** button.
3. Select the report output type (e.g. Acrobat for a PDF report output).
4. Click the **eXecute** button to generate the report.

Or alternatively, you can run the **Asset Search** report with the respective interest asset module. The navigation to the Management module is provided below as an example.

Step 1. Select either **Mgmt > Management Reports** or **Reports > Management Reports**.

Step 2. Click the **Asset Search** report.

Step 3. Specify criteria on the Report Parameters page.

Step 4. Click the **Submit** button.

Step 5. Select an output option (e.g. HTML, Acrobat etc.)

Step 6. Click the **eXecute** button to generate the report.

ASSET SEARCH REPORT OUTPUT

Enter report criteria to generate a report as either a PDF or HTML file.

Sunflower Enterprise		Asset Search				Page 2 of 3	
ASMN6120						02/23/2006 12:42	
Site : SAN DIEGO							
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
INA SHOES-XX		SHOES	SHIRTS AND STUFF INC	SHOES, 10 MENS		\$ 3,920.00	02/17/2006
		Quantity : 98	UoM : PAIR	Long Description : SHOES, MEN SIZE 10			
		Steward : SUNFLOWER SYSTEMS		Location : SAN DIEGO			
		Custodian : DOE JOHN 050599		BUILDING : 100 ROOM : IRP-1			
		Phone : 555.1234					
		User :					
		Phone :					
INA TROUSERS-XX		TROUSERS	SHIRTS AND STUFF INC	BLACK, 34 MENS		\$ 2,925.00	02/17/2006
		Quantity : 195	UoM : EA	Long Description : TROUSERS, MENS SIZE 34			
		Steward : SUNFLOWER SYSTEMS		Location : SAN DIEGO			
		Custodian : DOE JOHN 050599		BUILDING : 100 ROOM : IRP-1			
		Phone : 555.1234					
		User :					
		Phone :					
INA GUN2	SH	PISTOL	SHIRTS AND STUFF INC	38 CAL PISTOL	GUN2	\$ 1,000.00	02/17/2006
		Steward : SUNFLOWER SYSTEMS		Location : SAN DIEGO			
		Custodian : DOE JOHN 050599		BUILDING : 100 ROOM : IRP-1			
		Phone : 555.1234					
		User :					
		Phone :					
					Total :	3 \$	7,845.00
					Report Total :	3 \$	7,845.00

Figure 7-27: Asset Search PDF Report Output

RETIRE STOCK ASSETS

Retirement of assets, commonly referred to as disposal or excess, is the process used to remove property from an organization's physical and financial accountability. Proper and efficient disposal of excess material is an important and sensitive matter subject to federal regulations. In many cases, the first step towards retiring an asset is to create an excess request. The excess request signifies your intent to turn an inventory asset into an excess asset. The following section will describe the procedures used to initiate the excess process which includes details on how to:

- "Create an Excess Receival Request" on page 550
- "Create an Asset Final Event" on page 553
- "Reverse an Asset Final Event" on page 555
- "Reactivate Assets" on page 557

CREATE AN EXCESS RECEIVAL REQUEST

When an asset has reached the end of its useful life, you can create a request to dispose of the asset, which Sunflower calls an **Excess Receival Request**. Excess receival requests enable users who do not have the authority to directly create an excess asset to request the disposal of an asset. Recall that some users (i.e. clerks and ACRs) can only work with assets that belong to their assigned organizations. These users can create an excess receival request for assets assigned to their organization and an authorized user that manages the disposal of assets can process the excess receival request to create an excess asset. Excess assets can then be handled according to your organization's business practices and policies (e.g. placed in lots for auctions, donated to charities, listed for recovery internally and externally). Once the request is created, an automatic E-mail notice can be sent to the requestor and other responsible parties.

NOTE: Excess managers cannot create excess receival requests.

Scenario: The following graphic illustrates how to create an excess asset receival request for the GUN2 inactive asset. For more information about how to dispose of excess assets, see Chapter 5, "Excess Assets" on page 381 and Chapter 5, "Retire Excess Assets" on page 421.

NOTE: Use this procedure for Identified assets or for the elimination of the entire stock of a commodity asset. Do not use this process for partial commodities (e.g. retiring 50 of 100 trousers). If you want to decrease the inventory levels of a commodity stock asset, use the Personal Asset Provisioning feature's lost, stolen or damaged capabilities. For more information about handling stock assets as lost stolen or damaged, see "Identify Lost, Stolen, or Damaged Assets" on page 542.

NAVIGATION

- Click Excess
- Click Request Excess Receival
- Click Request Inactive Asset Excess Receival

Request Inactive Asset Excess Receival - asex2120

Request Information

Excess in-place?

Pick-up Location * SAN DIEGO__BUILDING__100__ROOM__IRP-1

Deliver-to Location * LIVERMORE__BUILDING__EXCESS__ROOM__RC

Assets

Ok	Δ	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	GUN2	SHIRTS AND STUFF INC	38 CAL PISTOL	PISTOL

Request No 1185

Asset Condition 1 UNUSED - GOOD

Comment Pick up between noon and 5:00 pm.

Message Complete

Figure 7-28: Creating an Excess Receival Request

- Step 1.** Navigate to the **Request Inactive Asset Excess Receival** screen.
- Step 2.** Select the **Excess in-place?** checkbox if you want the asset to remain in its current location but in the Excess state. Selecting this option overrides the **Pick-up Location** and **Deliver-to Location** required fields.
- Step 3.** Specify the **Pick-up Location** of the asset that you want to excess by double-clicking in the **Location** field to open the **Maintain Locations** screen and enter the pick-up location. (e.g. *SAN DIEGO_BUILDING_100_ROOM_IRP-1*)
- Step 4.** Specify the **Deliver-to Location** of the asset that you want to excess by double-clicking in the **Location** field to open the **Maintain Locations** screen and enter the delivery location. (e.g. *LIVERMORE_BUILDING_EXCESS_ROOM_RC*)
- Step 5.** Enter the asset identifier of the asset that you want to excess in the **Identifier** field. Click the Tab key to populate **Manufacturer**, **Model**, and **Official Name**.
- Step 6.** Select the asset condition that best describes the asset's current state.
- Step 7.** Use the **Comment** text box to specify any special circumstances or delivery considerations.
- Step 8.** Click the **Save** icon to save your redeployment request. The system generates a redeployment **Request No** (Number).

NOTE: If you accidentally requested the wrong asset to be sent to Excess, you can withdraw your request by using the **Withdraw Excess Receival Request** screen. For more information about withdrawing excess receival requests, see Chapter 4, "Withdraw Inactive Receival Requests" on page 325.

CREATE AN ASSET FINAL EVENT

Based upon your roles and responsibilities, you may be authorized to initiate the disposal process by creating receipt requests, however, you might not be authorized to finalize an asset and remove accountability of that asset from your organization. The final event process is a function that may only be performed by either a manager or a clerk.

Scenario: The following graphic illustrates how to use the Create Inventory Asset Final Events screen to specify the final disposition of the GUN-2-XX asset.

NAVIGATION

- Click Inactive
- Click Create Inactive Asset Final Events

Ok	Identifier	Manufacturer	Model	Official Name
<input type="checkbox"/>	GUN-2-XX	SHIRTS AND STUFF INC	38 CAL PISTOL XX	PISTOL XX
<input type="checkbox"/>				

Figure 7-29: Create an Inactive Asset Final Event

- Step 1.** Navigate to the **Create Inactive Asset Final Events** screen.
- Step 2.** Specify the date of the asset final event. The current date is the default value.
- Step 3.** Select the event type from the list of values (LOV) from the **Asset Final Event** field for the inactive asset. In this case, the asset final event type is a transfer.
- Step 4.** Double-click in the **User Fields**, to open the **Organization** pop up window and the select the organization that you are transferring ownership of the asset. Save to close this window.
- Step 5.** Double-click in the **Document field**, to open the **Maintain Documents** screen and enter the related asset final event document information. Save to close this window.
- Step 6.** Enter the identifier of the excess asset and click the Tab key. The **Manufacturer**, **Model**, and **Official Name** populate.
- Step 7.** Click the **Save** icon to save changes to your asset reservation record.

NOTE: The **Generate DD149** button is only active if you have licensed Sunflower Contract Reports.

REVERSE AN ASSET FINAL EVENT

You can reinstate an excess asset at any time by reversing the final event. Alternatively, you can perform a reinstatement of the excess asset by entering its asset identifier and updating its status with the **Maintain Inactive Assets** screen.

NOTE: Reversing an asset in this manner removes the historical record of this asset final event. If you want to retain the asset final event history, reinstate the asset using the **Maintain Inactive Assets** screen.

Scenario: The following graphic illustrates how to reinstate the GUN-2-XX excess asset.

NAVIGATION

- Click **Inactive**
- Click **Create Inactive Asset Final Events**

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

Final Events Section:

- Date: 05/31/2006
- Final Event: INTO EXCESS FROM INACTIVE
- User Fields*: (empty)
- Document*: (empty)
- Comment: (empty)

Assets Section:

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	GUN-2-XX	SHIRTS AND STUFF INC	38 CAL PISTOL XX	PISTOL XX
<input type="checkbox"/>				

Message: (empty)

Figure 7-30: Reverse an Asset Final Event

Step 1. Navigate to the **Create Inactive Asset Final Events** screen.

Step 2. Enter the query mode by clicking the **Find** icon.

NOTE: This step is critical. To reverse an asset final event in this manner, you must first enter the screen in query mode.

Step 3. Specify the date of the asset final event that you are attempting to reverse.

Alternatively, with the cursor in the **Date** field, click the **Find** icon again to return all of the asset final events. Click the **Next Record** and **Previous Record** icons to scroll through the asset final event records to help you retrieve the desired asset final events.

Step 4. To further limit your selection criteria, select the event type from the list of values (LOV) for the **Final Event** field. In this case, the asset final event type is *INTO EXCESS FROM INACTIVE*.

The system returns all of the assets in the **Assets** block for all asset final events that occurred on the same date with the same final event type.

Step 5. Place the cursor in the **Identifier** field for the asset that you want to reverse. In this case, asset *GUN2*.

Step 6. Click the **Remove Record** icon to remove the selected asset record.

Step 7. Click the **Save** icon to reverse the selected asset's final event.

NOTE: You can also reactivate a retired asset using the **Maintain Inactive Asset** screen by entering the retired asset identifier in the **Identifier** field. A prompt message informs you that this action will re-activate the asset. Using the **Maintain Inactive Asset** screen to reverse a retired asset keeps the historical record of the asset final event that you can view with the **Inactive Asset Summary and History** screen with the **Timeline** tab. Reversing an asset final event removes the event altogether.

REACTIVATE ASSETS

Reactivating an asset is similar to reversing an asset final event but with one very important distinction. When you reactivate an asset, the history for that asset includes the period of time in which the asset was retired or finalized.

Scenario: The following graphic illustrates how to use the Maintain Inventory Asset screen to reactivate an inventory asset.

NAVIGATION

- Click **Mgmt**
- Click **Maintain Inventory Asset**

The screenshot displays the 'Maintain Inventory Asset' window. A warning dialog box is overlaid on the form, stating: 'AS-01043: Warning: This asset has had a final event. Continuing will re-activate the asset.' The dialog has 'OK' and 'Cancel' buttons. The background form includes fields for Identifier (ICO_001), Type (Existing interest asset), Unique Name, Default Location, Catalog Identifier, Manufacturer, Official Name, Serial Number, Initial Event, Asset Value, Asset Condition, Activity Status, Manager, Steward, Custodian, User, Location, Document, User Fields, and Global User Fields. There are also buttons for 'Page 2', 'Commodity', 'Comment / Picture / Attachment', and 'Re-Request' at the bottom.

Figure 7-31: Re-Activate an Inventory Asset

- Step 1.** Navigate to the **Maintain Inventory Asset** screen.
- Step 2.** Enter the identifier of the asset record that you want to re-activate in the **Identifier** field and press Enter to display the asset's information.

A prompt message will inform you that this action will re-activate the asset, thereby reinstating the asset.

- Step 3.** Click the **Save** icon to reactivate the inventory asset.

CREATE PERSONAL ASSET PROVISIONING REPORTS

Sunflower provides a flexible and comprehensive web-based reporting system. The Sunflower database is queried when a report is created and executed. Reports display real-time information. Therefore, a report reflects any changes made during the day.

There are several output options available for your reports.

- PDF (Adobe Acrobat)
- HTML
- Text

Your outputs depend upon the report selected. Acrobat and HTML are standard options provided for most reports. Text file export is available for selected reports.

Use **Inactive Reports** to obtain information on stock assets awaiting issue. For more information about Inactive Reports, see Chapter 4, "Inactive Reports" on page 378.

Use **Inventory Reports** to obtain information on issued stock assets. (assigned to custodians) For more information about Inventory Reports, see Chapter 1, "Management Reports" on page 101.

GENERATE A PREVIOUSLY RUN REPORT

If you have a report that you run frequently, you may run it again without entering your report criteria (parameters) each time. Using the Previously Run Reports feature saves you a great deal of time since the criteria for numerous reports can be used as required without needing to restructure the criteria. To run a report in this manner, perform the following:

Step 1. Navigate to the **Management Reports** screen.

Step 2. Click the **Previously Run Report** link.

NOTE: You will need to know the system generated **Selection Criteria** number.

NAVIGATION

- Click Mgmt
- Click Management Reports
- Click Previously Run Report

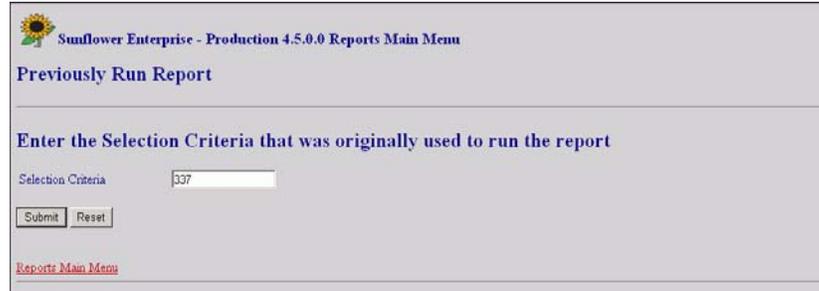


Figure 7-32: Previously Run Report Selection

Step 3. Enter the **Selection Criteria** number.

.....
NAVIGATION

- Click Mgmt
- Click Management Reports
- Click Previously Run Reports
- Enter the Selection Criteria number
- Click the Submit button



Sunflower Enterprise - Production 4.5.0.0 Reports Main Menu

Previously Run Report

Enter the Selection Criteria that was originally used to run the report

Selection Criteria

[Reports Main Menu](#)

Step 4. Click the **Submit** button.

Step 5. Select **HTML**. or **Adobe** output type.

Step 6. Click the **eXecute** button.

NOTE: The previously run report displays. Changes to the data that occurred since the last report are reflected in the new report.



IT COMPONENTS

IT Components is an innovative IT asset management solution that maximizes your technology investment. Sunflower IT Components is an integrated application that supports critical IT initiatives such as migrations, software license compliance, and end user support.

ABOUT IT COMPONENTS

IT Components is an innovative IT asset management solution that includes the following key features:

- A complete lifecycle solution, from planning and procurement through retirement and disposal
- A scalable, secure relational database
- A flexible, open architecture for easy integration with other open application systems
- Flexible interface layer for integration of external application systems
- Robust reporting capabilities
- Strong cost and financial management functionality
- Easy configuration, requiring no source code changes
- In-depth decision support information and functionality

Sunflower IT Components has its own User Guide that you can download from the Sunflower Systems Customer Care website. Logon to the Sunflower Systems Customer Care website and locate the Documentation link listed in the following illustration. For more information about downloading documentation from the Sunflower Systems Customer Care website.

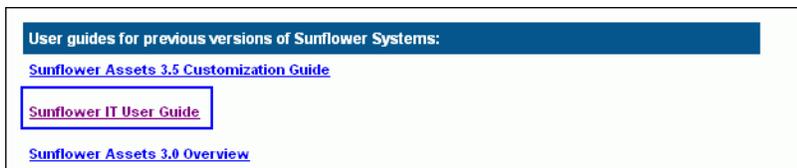


Figure 8-1: Downloading the IT Components User Guide



PO INTERFACE

Sunflower provides the Purchase Order (PO) Interface feature to view purchase orders that have been received from a purchasing system. This feature provides the ability to search the PO Interface table for purchase orders that are ready to allocate the financial value of one or more line items (PO Items) from one or more POs to one or more assets. You can allocate the financial value of PO Items to existing assets as well as to new assets or to a mix of existing and new assets. You can also use the PO Interface to create assets on the fly as part of the process of allocating PO Items to assets. In this chapter, you will learn how to use the PO Interface to perform common asset management tasks for your organization.

KEY CONCEPTS

This chapter includes the following discussion points and concepts:

- About The PO Interface
- PO Interface Records Process
- Create an Asset Record From a PO
- Variations on PO Interface Asset Creation
- PO Interface Records Field Terms

ABOUT THE PO INTERFACE

As an asset management professional, one of your primary responsibilities is the creation of and maintenance of asset records. There are typically two methods for creating an asset within Sunflower applications. You can create an asset from scratch or create an asset from a purchase order. Sunflower provides a purchasing interface (PO Interface) that enables you to use data from a PO generated from a purchasing system to create an asset record within Sunflower.

The PO Interface design supports a variety of purchasing systems and purchase orders that are commonly in use. You can allocate PO Items to the following types of interest assets:

- Agreement
- Inventory
- Financial
- Inactive
- Excess

The process and the screen is identical for each interest type with two exceptions:

1. The screen label refers to the specific interest asset type
2. Agreement Assets has an additional tab labeled “Agreement” appearing on the Process Agreement Asset PO Interface Records screen.

The following discussion illustrates how to use the PO Interface to create assets within Sunflower.

PO INTERFACE RECORDS PROCESS

When acquiring assets with a purchasing application, you record assets with their acquisition cost. The PO interface enables you to capture the acquisition costs from a purchase order (PO), delivery order, credit card purchase, or any other procurement document. Often, the cost of an asset is equal to the amount charged to purchase the asset and any associated costs to prepare the asset for its intended use. These associated costs could include freight, shipping, taxes, site preparation, installation, testing, and reconditioning.

When a purchase order is transmitted to Sunflower, a shell asset is created for property related items. For example, after creating a PO but before receiving the associated assets, you can transmit PO information to Sunflower from a purchasing feed, which creates shell assets. These shell assets act, as placeholders for the assets that have been ordered but not received. Shell assets contain most of the information needed to create an asset record but they still require key pieces of information such as the **serial number**, **location**, **custodian** and **user**, which you may not be able to specify until the assets have been received and distributed.

The PO Interface feature enables you to allocate data to new and existing assets by moving the data from the shell assets tables to the interface tables where they reside until the required core asset information can be validated. Once the asset is validated, the data residing in the interface tables can be moved into the core asset record tables. See Figure 9-1: Converting PO Information to Asset Records, for an illustration of this process.

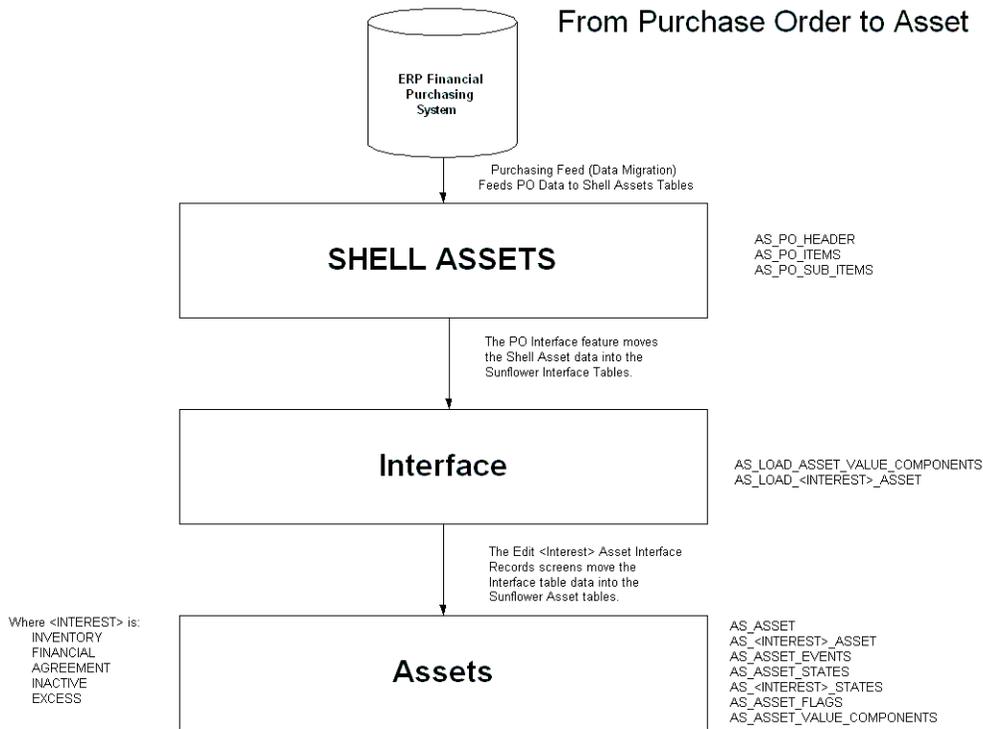


Figure 9-1: Converting PO Information to Asset Records

STANDARD ACQUISITION PROCESS

The standard acquisition process for an asset includes cross checks (matching) to ensure an ordered item is received before being paid. When an asset is received, a receipt is created in a procurement system. This receipt is used to extract information from the PO to create the asset records. Once a property record is created and if capitalized, then the capital asset details can be reflected in the Finance module or added to a 3rd party financial system via a real-time process interface. Journal entries to record asset value and depreciation close the loop of the asset's lifecycle. The following example illustrates a Standard Acquisition Process using Sunflower Assets:

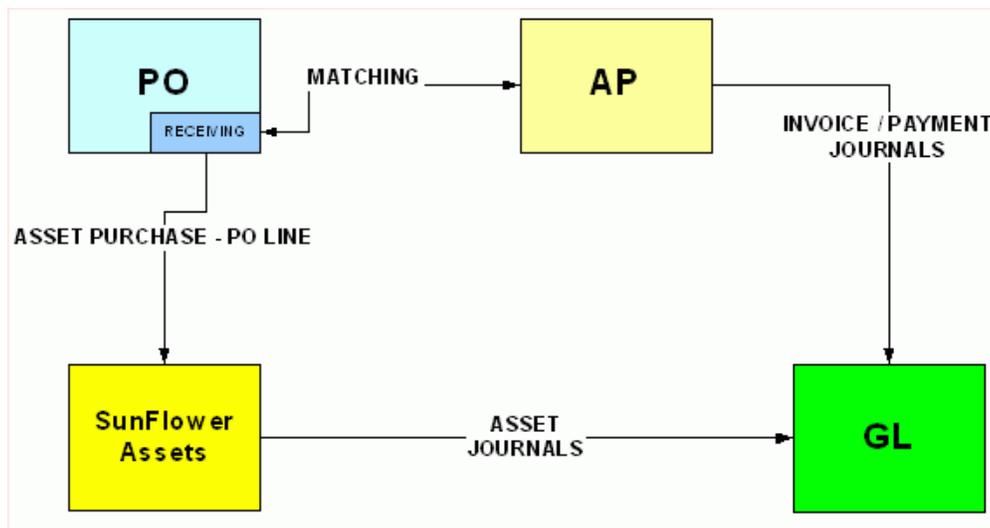


Figure 9-2: A Standard Acquisition Process

For more information about capitalization and depreciation of assets records, see Chapter 2, "Finance" on page 147.

CREATE AN ASSET RECORD FROM A PO

The PO Interface is available with the Sunflower Application modules (e.g. Agreement, Management, Finance, Inactive and Excess) enabling you to create asset records from a PO for the interest asset of your choice. The PO Interface feature moves newly acquired assets into the asset interface and the asset value component interface tables.

NOTE: Allocating PO items to existing assets stores the related asset value information in the asset value component interface table only.

Sunflower Assets provides two screens, (**Edit <Interest> Asset Interface Records** and **Edit <Interest> Asset Value Component Interface Records**), for viewing, editing and moving the data from the interface tables into the Sunflower asset tables.

NOTE: By enabling the *AUTOPROCPO* system parameter, you can process records directly from the PO Interface tables into the asset record tables, provided there are no errors for the data that you are processing. For more information about the *AUTOPROCPO* system parameter, see the Sunflower Enterprise Administration Guide.

Creating an asset record in Sunflower from a PO is a multi-step process:

- Step 1.** Acquire the PO information from a purchasing system feed.
- Step 2.** Retrieve a Purchase Order.
- Step 3.** Allocate Purchase Order Line Items.
- Step 4.** Edit data in the Sunflower interface tables.
- Step 5.** Move valid asset record data into the asset record tables.

The following sections illustrate how to allocate assets and asset value components to new and existing asset records using the PO Interface feature.

RETRIEVE A PURCHASE ORDER

The first step of the PO Interface process is to query for POs that include items awaiting allocation. Each PO record includes information from the PO Header that you can configure to adapt to your organization's purchasing system and processes. The **PO Items Details** block of the **PO Interface Record** screen lists the PO line information for the selected PO.

The **PO Item Details** block displays:

- Item Number
- Description
- Quantity Ordered
- Quantity Received
- Allocation of Assets (Quantity/Assets)
- Unit of Measure (UOM)
- Price (per unit)
- Name/Value pairs (according to how you define them)

Scenario: The following graphic illustrates how to use the PO Interface to create an inventory asset. PO ID **10810** has two line items that are awaiting allocation. The first line item is allocated as an asset. The second line item is treated as a non-property item that supports line item one.

NAVIGATION

- Click Mgmt
- Click Process Inventory Asset PO Interface Records

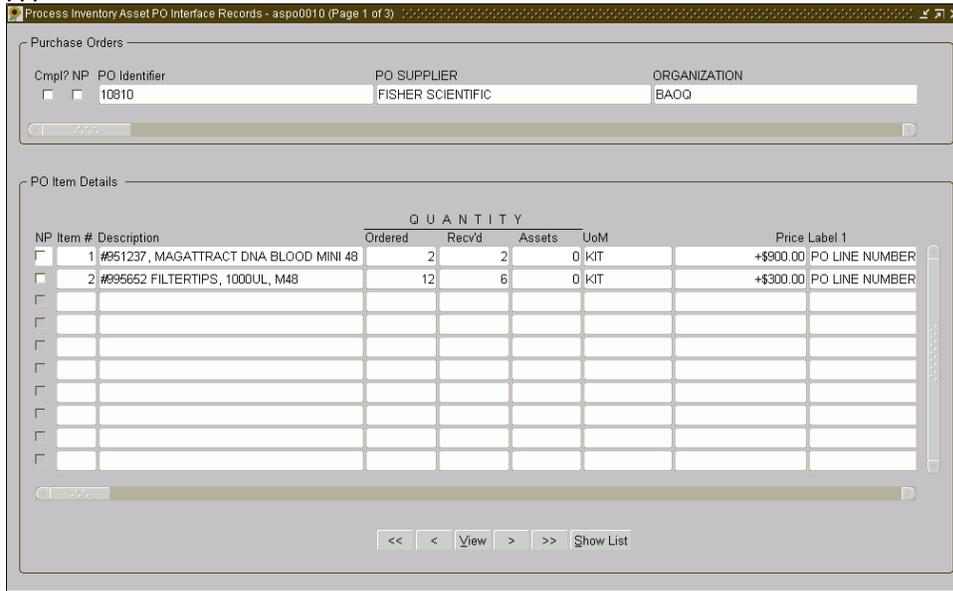


Figure 9-3: Retrieving a PO with the PO Interface Records Screen

Step 1. Navigate to the **Process Inventory Asset PO Interface Records** screen.

Step 2. Enter the purchase order (PO) ID in the **PO Identifier** field for the purchase order that you want to retrieve and process.

You can process POs for an interest asset by navigating to the same screen under the desired module. For example, From the **Agree** menu, select **Process Agreement Asset PO Interface Records**.

Step 3. To select a specific PO with line items awaiting allocation, click the **Find** icon to enter query mode, enter the desired PO identifier and click tab key to return the matching PO.

- If you do not know the specific PO ID that you want to process or you would like to retrieve a series of POs available for processing, execute a query by clicking the **Find** icon twice. This returns all of the available purchase orders ready for processing.
- Use the **Previous Record** and **Next Record** icons to select the desired PO identifier. In this example, the purchase order ID is **10810**.

NOTE: If you wish to retrieve POs that contain only non-property items, check the **NP** box in the **Purchase Orders** block before executing a query.

NON-PROPERTY FLAG

To indicate that all of the line items (**Item #**) for a selected PO are non-property, check the **NP** box in the **Purchase Orders** block and all of the items in the **PO Items Detail** block will be designated as non-property (**NP**). If you mark a particular **Item #** as **NP**, then you cannot select that particular PO item for allocation. If a **PO Identifier** is marked as **NP**, then none of the PO items can be allocated from that PO. To change the non-property status of the PO or PO Item, uncheck the **NP** box. Non-property POs are sorted last when you query for POs.

COMPLETED FLAG

The **Cmpl?** (completed) flag is used to denote POs whose processing, in regards to allocating assets, is complete. Check the **Cmpl?** box and save to indicate that the processing of the highlighted PO is complete. You cannot select PO line items from a PO marked as complete. To modify a completed PO, uncheck the **Cmpl?** box. Completed records are sorted last in a query.

ALLOCATE PURCHASE ORDER LINE ITEMS

The next step to creating an asset record is to allocate the retrieved PO items to an asset and its asset value component. You can apply the allocation process to a new or an existing asset. After receiving an asset, an Inventory Manager must determine which lines on a PO make up the asset. For example, if you have a capital equipment purchase on a PO that includes preparation and installation costs to make the equipment available for use, you could include the preparation and installation costs as part of the asset value component for the capital equipment. The line items specific to the preparation and installation costs would not be used to create separate assets but rather, would be allocated as part of the overall asset valuation component. Similarly, ongoing maintenance and upgrades to keep this same piece of capital equipment in good working order can be considered added asset value components to an existing asset. This work and any replacement parts (that you do not want to track as individual assets in the system) would be separate line items on a PO that by itself do not create a new asset but adds value to an existing asset.

NAVIGATION

- Click Mgmt
- Click Process Inventory Asset PO Interface Records
- Click Find icon
- Enter PO ID **10810**
- Click Find icon
- Click the Show List button to view Selected POs window

The screenshot displays the 'Process Inventory Asset PO Interface Records' window. The 'Purchase Orders' section shows a search for PO 10810 from Fisher Scientific. The 'PO Item Details' table lists two items: a DNA kit and filter tips. A 'Selected POs' window is open on the right, showing PO 10810 and item 1 selected for allocation.

		Q U A N T I T Y				
NP	Item #	Ordered	Recvd	Assets	UoM	
<input checked="" type="checkbox"/>	1	#951237 , MAGATTRACT DNA BLOOD MINI 48	2	2	0	KIT
<input type="checkbox"/>	2	#995652 FILTERTIPS, 1000UL, M48	12	6	0	KIT
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

Figure 9-5: Allocating PO Items

- Step 1.** To begin the process of allocating PO line items to new or existing assets, click the **Show List** button to open the **Selected POs** screen. Select one or more **Item #**, to place each on a staging form for allocation.
- Step 2.** In the **PO Items Details** block, click the **Item #** field to highlight the PO line item you are selecting for allocation.
- Step 3.** Use the add button at the bottom of the **PO Items Details** block to move a highlighted PO line item or use the add all button to move all of the PO line items to the **Selected POs** screen.
- If you wish to remove a PO Item from the **Selected POs** screen, click the remove button to remove a highlighted item.
 - Click the remove all button to remove all of the PO Line items on the Selected POs screen.
- Step 4.** Click the **Allocate** button to allocate the selected PO line items to a new or existing asset record.

ASSET TAB

When creating assets with the PO Interface, you add the pieces of information that were missing when the shell assets were created from the PO provided by the purchasing feed. You may recall that the data from the purchasing feed is reflected in Sunflower in the PO_HEADER, PO_ITEMS and PO_SUB_ITEMS tables where they remain until you specify the allocation of this information for your assets. The PO Interface **Asset** tab, **Initial Event** tab, **Agreement** tab (if you are creating Agreement Assets) and the **Value Components** tab enable you to provide the required information and move the data to the interface tables where they are further validated against the Sunflower database.

The **Asset** tab appears after clicking the **Allocate** button on the **Selected POs** screen. Use the **Asset** tab to complete the PO line item selection process. Many of the fields on the **Asset** tab contain the corresponding information received from the purchasing system feed. The left-hand block labeled **Assets**, displays the asset identifiers of all the assets that you want to create or update by allocating the PO data. The right-hand set of tabs displays the details of the asset highlighted in the left-hand column.

NAVIGATION

- Click Mgmt
- Click Process Inventory Asset PO Interface Records
- Click Find icon
- Enter PO ID *10810*
- Click Find icon
- Click the Show List button to view Selected POs window
- Click Allocate
- Click Asset tab

The screenshot displays the 'Process Inventory Asset PO Interface Records' application window. On the left, the 'Assets' list shows a table with columns for 'Ok', 'Identifier', and '* New Asset'. The identifier '10810' is highlighted. Below the list are controls for 'Duplicate' (set to 1), 'Use next available identifier?' (unchecked), and buttons for 'Unprocessed Asset Records', 'Edit New Assets', and 'Edit Existing Assets'. The right pane shows the 'Asset' tab with the following details:

- Identifier Type: [Empty]
- Catalog*: 1223
- Manufacturer: FISHER SCIENTIFIC
- Model: #951237, MAGATTRACT DNA BLOOD MINI 48 KIT
- Official Name: #951237, MAGATTRACT DNA BLOOD MINI 48 KIT
- Serial Number: [Empty]
- Acquisition Date: 06/28/2005
- Effective Date: 06/28/2005
- Responsibility Date: 06/28/2005
- Activity Status: IN SERVICE
- Flags*: [Empty]
- Asset Condition: 1 | UNUSED - GOOD
- Manager: SUNFLOWER SYSTEMS
- Owner: SUNFLOWER SYSTEMS
- Steward: SUNFLOWER SYSTEMS
- Custodian Identifier: [Empty]
- User Identifier: [Empty]
- Location*: LIVERMORE_BUILDING_101_ROOM_121
- Activity Type: [Empty]

A message box at the bottom indicates 'Complete'.

Figure 9-6: The PO Interface Asset Tab

The **Assets** block of the **Process Inventory Assets PO Interface Records** screen displays the following fields:

- *** New Assets** - are identified with an '*'
- **OK** - Checked once the asset is processed successfully out of the PO Interface tables
- **Identifier** - Asset Identifier/Tag Number
- **Duplicate** - Number of additional identical assets to create
- **Unprocessed Asset Records** - The number of new assets displays (next to the **Edit New Assets** button). The number of unprocessed new assets created in the Assets column. The number of existing assets displays (next to the **Edit Existing Assets** button).
 - Click the **Edit New Assets** button to open the **Edit Asset Interface Records** screen to view the unprocessed records.
 - Click the **Edit Existing Assets** button to open the **Edit Asset Value Component Interface Records** screen to view the unprocessed records.
- **Use Next Available Identifier** - Check to let the system select the next incremental asset identifier for the items being allocated.

Step 1. Enter the identifier for the new or existing asset for the PO line item that you are allocating in the **Identifier** field. You can enter an asset identifier by typing an identifier directly or by duplication. For more information, see "Duplication" on page 588.

Step 2. Enter the asset details for the asset record you are creating or modifying with the **Asset** tab. If you are modifying an existing asset, the asset information displays on the asset tab. If it is a new asset, you must populate the PO information fields by entering the data on the **Asset** tab. The Asset tab fields are populated like the **Maintain Inventory Assets** screen.

Step 3. Click the **Save** icon to save the **Asset** tab information.

INITIAL EVENT TAB

The **Initial Event** tab displays descriptive information about an asset's initial event if the data is mapped from the PO record. If this information is not available from the PO record, you can create the asset with the default initial event for the respective interest asset type. You can specify these default initial event values by using the [DASINEVTP](#) application parameter. For more information about the [DASINEVTP](#) application parameter, see the Sunflower Enterprise Administration Guide. .

NAVIGATION

- Click **Initial Event** tab

Figure 9-7: The PO Interface Initial Event Tab

The **Initial Events** tab is a view only screen that displays an asset's initial event, typically a purchase or transfer. The following informational fields are displayed on the **Initial Event** tab:

- **Initial Event** - Name of the initial event
- **User Defined Fields** - If the specified initial event has user defined fields (UDF) defined in the system, then each UDF appears with its label on the left and the value on the right. The value for each initial event UDF can be mapped over from any PO or PO Item field. This mapping can be coded in the [as_po_interfaceu.prepare_asinev_attributes](#) procedure. You can capture up to 30 context related user defined fields. For more information about extending User Defined Fields, see the Sunflower Enterprise Administration Guide.

VALUE COMPONENTS TAB

The **Value Components** tab displays the asset's **Value Type** (e.g. Acquisition Cost or Freight) and the associated dollar value that was mapped to the PO line item information.

When allocating more than one line item, the value of one unit from each line item appears as individual asset value components for the assets that you are processing. The **Value Components** tab may contain more than one record per asset depending on the number of line items that you decide to allocate. There is one asset value component record for each PO item that is allocated. You can scroll through the records associated with the asset that you are creating by using the **Next Record** and **Previous Record** icons.

NAVIGATION

- Click **Value Components** tab

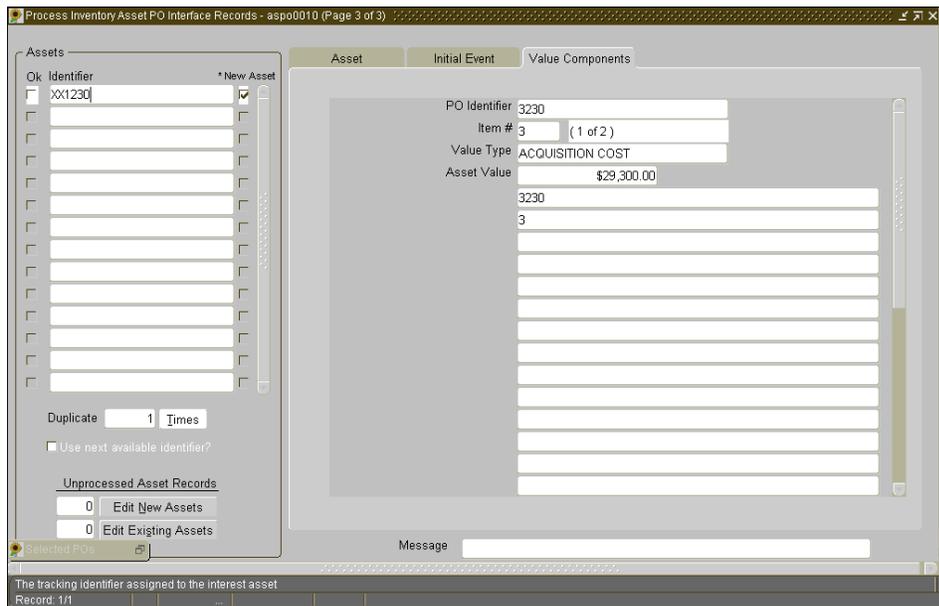


Figure 9-8: The PO Interface Value Component Tab

The **Value Components** tab is a view only screen that displays the components that derive an assets' value. The following informational fields are displayed on the **Value Components** tab:

- **PO Identifier**
- **Item #** (Item # out of total number of line items being allocated from one or more POs)
- **Value Type** (Acquisition Cost)
- **Dollar Value**
- **User Defined Fields** - If the **Value Type** has any user defined fields (UDF) defined in the system, then each UDF displays with its label on the left and the value on the right. The value for each UDF can be mapped over from any PO Item or PO Sub-Item field. This mapping can be coded in the [as_po_interfaceu.prepare_asvlcm_attributes](#) procedure. You can capture up to 30 context related user defined fields.

NOTE: After completing the allocation of your units, the records are moved in batches out of the PO Interface tables and into the Sunflower Asset tables.

The fields on the asset **Value Component** portion of the PO Interface feature are populated with the PO Header and PO Line Item information.

AGREEMENTS TAB

The **Agreement** tab is available to specify the agreement asset related information when mapping PO information that is tied to an agreement. Use the **Agreement** tab to define agreement specific information for each asset that defines the agreement or contract for which the asset is tied. In addition, use the **Agreement** tab to provide the method of how the asset was acquired (e.g. contractor acquired property or government furnished property etc.) and the **Classification** of the property (e.g. *Special Test Equipment* or *Special Tooling* etc.).

NAVIGATION

- Click Agreement tab

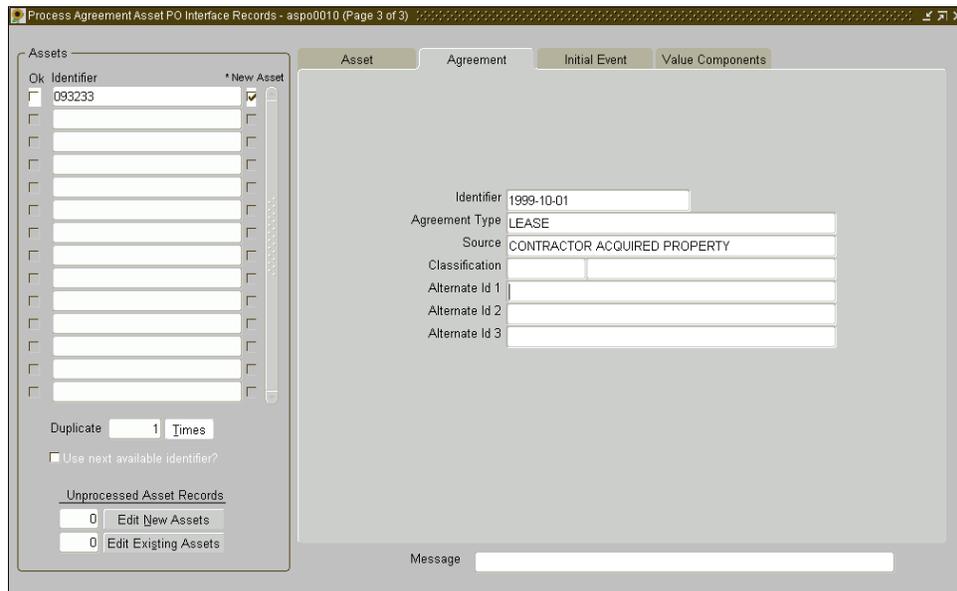


Figure 9-9: The PO Interface Agreement Tab

The **Agreement** tab displays an asset's related agreement information. Use the **Agreement** tab to complete the PO line item selection process. Many of the fields on the **Agreement** tab contain the corresponding information received from the purchasing system feed.

The following editable fields are available on the **Agreement** tab:

- **Agreement Identifier**
- **Agreement Type**
- **Source** (required for Contract Reports)
- **Classification** (required for Contract Reports)
- **Alternate Identifier 1**
- **Alternate Identifier 2**
- **Alternate Identifier 3**

If the information is blank, you can complete the information in the same manner as the **Maintain Agreements** screen.

NOTE: This tab is only visible when allocating agreement assets.

EDIT PO INTERFACE RECORDS

After updating and saving the shell asset with the required information on the **Asset** tab, the **Unprocessed Asset Records** field displays a value of **7**, next to the **Edit New Assets** button. Click the **Edit New Assets** button to launch the **Edit Inventory Asset Interface Records** screen. The screen dynamically populates with the related interface table data so that you can edit the current record for missing or erroneous information.

NAVIGATION

- Click Asset tab

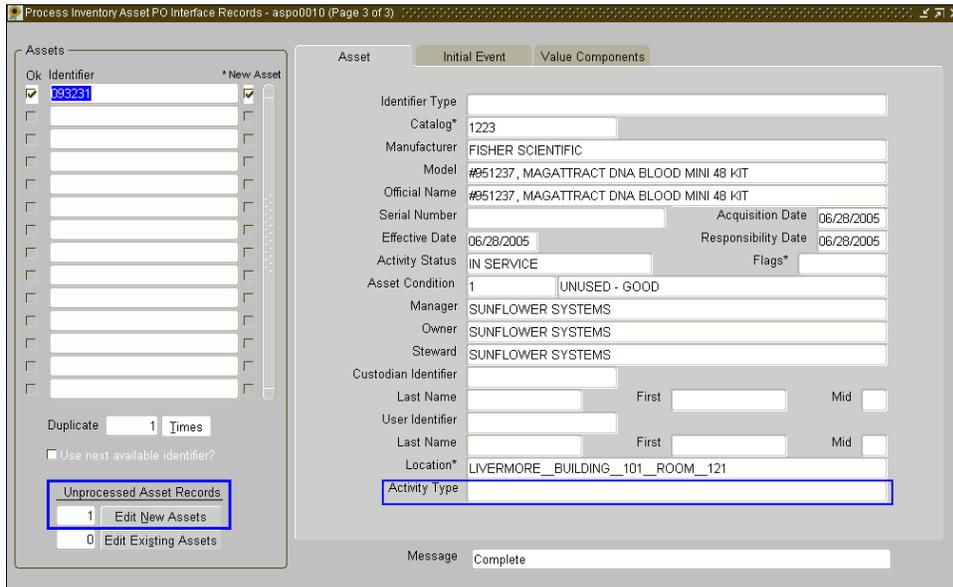


Figure 9-10: PO Interface Edit New Assets Button

INVENTORY ASSET INTERFACE RECORDS

The **Edit Asset Interface Records** screen has been reorganized to provide a more intuitive navigational structure. The new construct is due to enhancements of the APIs that support the Edit Asset Interface Records screen resulting in a corresponding change to the look, feel and usability as follows:

- Ability to set column values to **NULL**

For example, if an Inventory Manager leaves a required field blank, it is still possible to commit the asset record to the database. Previously the Sunflower `as_load_inventory_asset` API would not allow this transaction to occur. The `sa_load_column_indicators` table indicates which columns contain a supplied value which enables the Load-APIs to treat a NULL value in various `as_load/sa_load` tables as a true NULL value.

- Addition of **Primary** and **Business** key columns to support interface tables

The Load APIs have been enhanced by the addition of primary and business key columns.

EDIT INVENTORY ASSET INTERFACE RECORDS

Use the **Edit Inventory Asset Interface Records** screen to move data from the interface tables to the asset record tables and to correct any errors that occur while attempting to load assets created with an Interface.

NAVIGATION

- Click the **Edit New Assets** button on the **PO Interface** screen
- or
- Click **Mgmt**
- Click **Edit Inventory Asset Interface Records**

Figure 9-11: Edit Inventory Asset Interface Records

The **Edit Inventory Asset Interface Records** screen displays the information that was entered by using the load interfaces. However, the information may require validation and corrections before the data can move from the interface tables to the asset record tables.

After reviewing the data, Click the **Save** icon to commit the record and determine if the load was successful or if the record requires further edits.

REVIEWING ERRORS IN THE INTERFACE TABLES

Invalid data from the interface tables *cannot* be loaded into the asset record tables until the data is corrected. Review the error messages and edit the data accordingly.

Figure 9-12: Reviewing Error Messages

In this example, the **Steward** must be specified before the data can be loaded into the asset record tables.

CORRECTING ERRORS IN THE INTERFACE TABLES

Use the **Edit Inventory Asset Interface Records** screen to correct any errors that occur while attempting to move data from the interface tables to the asset records tables. The following example tells us that at least one error is preventing the data from loading to the asset records tables. If you have trouble spotting the error on this screen, click the **Go To Error** button and the cursor displays in the field requiring an edit. Update the information accordingly. If there are multiple errors for an asset record, scroll through the error messages by clicking the **Next Record** icon to review all of the error messages.

The screenshot shows the 'Edit Inventory Asset Interface Records' window. At the top, there are fields for 'Load Group' (ACC), 'Record Group' (0127), and 'Processed'. Below these is a status bar: 'OK (Identifier:0127 Site:LIVERMORE StM 1:BUILDING E StM 2:ROOM 1202 StM 3:)' and a 'Go To Error' button. A tabbed interface is visible with 'Asset' selected. The main form contains the following fields:

- Action: New Asset
- Existing Interest Identifier: []
- Interest Entity: [] Prefix: [] Name: []
- Inventory Asset Id: [] Asset ID: []
- Identifier: 0127
- Unique Name: []
- Asset Identifier Type: [] Code: [] Description: []
- Manager: [] Code: [] Name: SUNFLOWER SYSTEMS
- Owner: [] Code: [] Name: SUNFLOWER SYSTEMS
- Steward: 5000000093 Code: AC01 Name: ASSET CENTER 01
- Catalog: [] Identifier*: []
- Manufacturer: [] Code: [] Name: APPLE
- Model: M5600 Model Name: []
- Official Name: []
- Asset Type: [] Code: [] Description: []
- Serial Number: 98701 Drawing No.: []
- Flags: 1 2 3 4 5 6 7 8 9 10
- Acquisition Date: 01/01/1998 Responsibility Date: 01/01/1998 Effective Date: []
- Release Datetime: 08/19/1998 16:41:05 Accept Datetime: [] Expected Return Date: []

Figure 9-13: Correcting PO Interface Load Errors

Click through the tabs to view additional interface table data. This is the final step to moving a PO item into Sunflower as an asset record.

VERIFYING ASSET RECORDS CREATED FROM THE PO INTERFACE

The following graphic verifies that a newly created asset now resides in the application as an inventory asset. The inventory asset identifier **0127** from Load Group **ACQ**, PO **88** Line Item **1**, and Purchase Account **DD44** is now available in the application by viewing the asset record with the **Maintain Inventory Assets** screen.

The screenshot displays the 'Maintain Inventory Assets' window for asset 0127. The asset is an Apple Power Mac, purchased for \$4,525.00 on 01/01/1998. It is currently in 'IN SERVICE' status, managed by Sunflower Systems. The asset is located at Livermore Building E, Room 1202. The custodian is Timothy Frazier. The purchase was made through PO 88 Line Item 1, account DD44.

Identifier	Type	Type	Identifier	Released?
0127		Existing interest asset		Y

Inventory Assets
 Unique Name:
 Default Location*:
 Catalog Identifier*: 27 Commodity Asset
 Manufacturer: APPLE
 Official Name: COMPUTER-PERSONAL
 Serial Number: 98701
 Initial Event: PURCHASE
 Asset Value*: \$4,525.00
 Acquisition Date: 01/01/1998
 Responsibility Date: 01/01/1998
 Asset Condition:
 Effective Date: 10/03/2005
 Expected Return Date:
 Activity Status: IN SERVICE
 Flags*: S
 Activity Type:
 Manager: SUNFLOWER SYSTEMS
 Owner: SUNFLOWER SYSTEMS
 Steward: ASSET CENTER 01
 Accepted?: Y
 Rep: ONE A.R. ACR01
 Custodian: 050167
 Last Name*: FRAZIER
 First: TIMOTHY
 Mid: M
 User:
 Last Name*:
 First:
 Mid:
 Location*: LIVERMORE__BUILDING__E__ROOM__1202
 Document*:
 User Fields*:
 Global User Fields*:
 User Fields*: PO88__1__DD44

Page 2 Commodity Comment / Picture / Attachment Re-Request

Figure 9-14: Reviewing Newly Created Asset

VARIATIONS ON PO INTERFACE ASSET CREATION

As mentioned before, there are several options to creating an asset when working with the PO Interface. Rather than detailing all of the steps required (which you can reference in the previous discussion, “Create an Asset Record From a PO” on page 568), to create an asset using the PO Interface feature, the following discussion highlights the variations that you can use to create assets with the PO Interface feature. These variations include:

- “Duplication” on page 588 (Creating multiple assets from one line item)
- “Create an Asset From Multiple PO Line Items” on page 590
- “Non-Property Items” on page 593

DUPLICATION

The **PO Interface Duplication** feature can be used to create multiple assets from a single line item. For example, a common business practice could involve the purchase of several computers with the same manufacturer and model. Rather than creating each asset record from scratch, you can use the **PO Interface Duplication** feature to replicate the common information for each item from a selected line item. While much of the asset record information is the same, a unique asset identifier must be assigned for each asset record. The details of an asset can be quickly and easily duplicated to create similar assets.

Scenario: The following graphic illustrates how to to create duplicate records using the PO Interface Duplication feature.

NAVIGATION

- Enter Number in Duplicate field
- Place cursor in the identifier field
- Click Times button
- Click Save icon

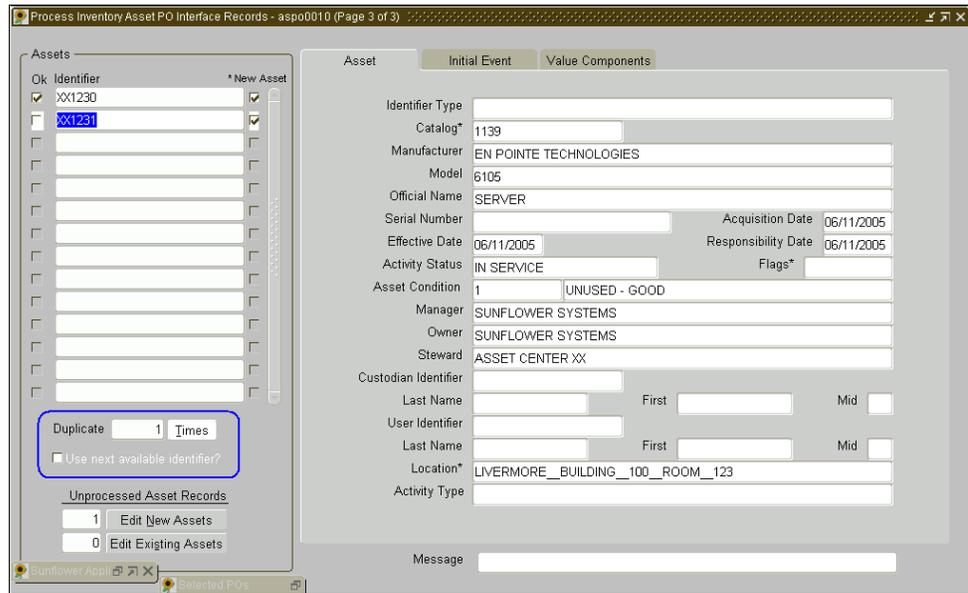


Figure 9-15: Using the PO Interface Duplicate Feature

Step 1. Enter the number of duplicate assets you wish to create in the **Duplicate** field.

Step 2. Press the **Times** button.

- The new assets are created and indicated in the **Assets** block by either the **Tag Needed** indicator or by incremented asset identifiers.
- Assign a valid asset identifier to each asset.
- You can modify the details of each asset before saving. When using an alphanumeric value; any number of initial alpha characters terminated by a numeric value of one or more digits increments the numeric portion of the asset identifier and is assigned to each duplicate asset.

NOTE: You will need to update information on the **Assets** tab for each asset accordingly. For example, **Serial Number**, **Activity Type**, **Manager**, **Custodian**, **Steward** and **Location** may vary for each asset record.

CREATE AN ASSET FROM MULTIPLE PO LINE ITEMS

Similar to creating an asset from a single unit on a line item, you can use the PO Interface feature to create an asset from multiple line items from a single PO or multiple POs. Your organization may be responsible for assembling assets that require many parts and processes provided by multiple vendors. In order to create this complex asset, you will need to allocate several line items from several different POs to a single asset. For example, You might be interested in purchasing a large piece of laboratory capital equipment that requires work to prepare the site, install the equipment, maintain the equipment, train personnel on the use of the equipment, additional items to upgrade the base model, spare parts, several related accessories and cleaning supplies. Many of the items may be provided by one or more vendors. In order to capture the true value of the new equipment, you need to capture the cost to prepare the site, install and upgrade the equipment as part of the overall value of the equipment. You can use the PO Interface to allocate all of these expenses to the asset by capturing the overall asset value components of this new equipment.

You can set up complex assets in a similar fashion as a single asset from multiple line items. In this case, you use the **Selected POs** screen to help allocate the various asset value components making up the complex asset. Behind the scenes, you are creating a new asset in the Sunflower Asset tables with multiple entries to the Sunflower Assets Value Components table.

Scenario: The following graphic illustrates how to allocate multiple lines to a single asset to create a complex asset.

The screenshot shows a window titled "Selected POs" with two buttons at the top: "View Purchase Order" and "View PO Item Details". Below the buttons is a table with two columns: "PO" and "Item #". The table contains the following data:

PO	Item #
1005	1
10820	1
1970	1
2830	1
3230	1
3230	2
3230	3
3230	4

Figure 9-16: Allocating multiple Line Items From Multiple POs to a Single Asset

The **Selected POs** screen above displays several line items from the various POs required to create a single piece of capital laboratory equipment. By allocating each line item to a single asset identifier, you are adding the related value components of each selected line item to a single complex asset.

Once you have processed the shell asset successfully, you will have an asset whose total value reflects the sum of the asset value components that you selected using the PO Interface allocation process.

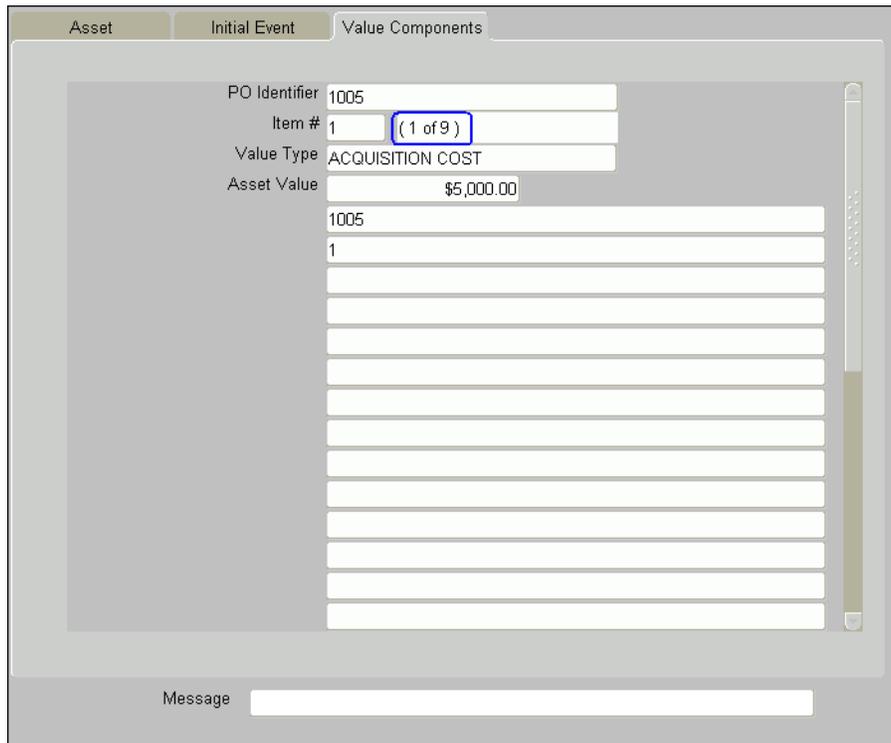


Figure 9-17: Allocating Multiple Asset Value Components to a Single Asset

This complex asset uses nine total asset value components to determine the overall value of the newly created asset. Alternatively, you can select an existing asset identifier and allocate line items from POs to increase the overall value of an existing asset. For example, you could add parts or accessories that extend the working life and value of an asset. In addition to extending the overall service life of an asset, this action can add value to the asset.

NON-PROPERTY ITEMS

Some POs may contain non-property assets that neither add value directly to an asset (complex asset, see “Create an Asset From Multiple PO Line Items” on page 590) or by themselves are items that you would not want to track with Sunflower. Simply mark those items as non-property in the **PO Line Items Details** block of the **Inventory Asset PO Interface Records** screen by checking the **NP** box. This is an auditable action that prevents the items from being allocated but enables you to keep a history of the items in the **AS_PO_HEADER**, **AS_PO_ITEMS** AND **AS_PO_SUB_ITEMS** tables.

Scenario: The following graphic illustrates how to designate a line item as non-property with the PO Interface:

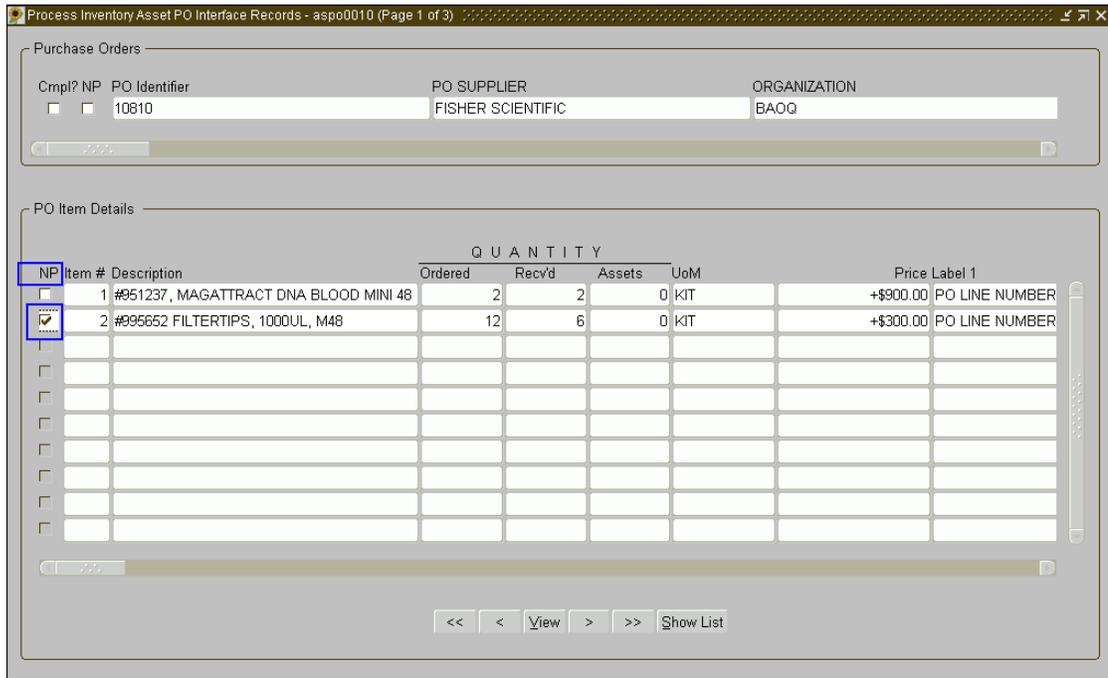


Figure 9-18: PO Interface Non-Property Line Item

You can verify that the item marked as non-property has a historical record in the **AS_PO_ITEMS** database table by querying the database with a standard SQL query tool such as TOAD.

The screenshot shows a database query tool interface. On the left, a table list includes AS_PO_ITEMS. The main window displays a table with the following data:

ID	CREATE...	DESCRIPTION	ITEM_NUMBER	NON_PROPERTY_FLAG
6402	11/26/2003	225	1	
6403	11/26/2003	10K	1	
6404	11/26/2003	40-43-1-07	1	
6405	11/26/2003	AS12	1	
6406	11/26/2003	003312	1	
6407	11/26/2003	C640	1	
6408	11/26/2003	2160ES	1	
6409	11/26/2003	225	1	
6410	11/26/2003	10K	1	
6411	11/26/2003	40-43-1-07	1	
6412	11/26/2003	AS12	1	
6413	11/26/2003	#995652 FILTERTIPS, 1000UL	2	Y

Figure 9-19: AS_PO_ITEMS Table with Non-Property Flag for Audits

PO INTERFACE RECORDS FIELD TERMS

The following table defines the purpose of each field on the **Process Inventory Asset PO Interface Records** screen.

Process Inventory Asset PO Interface Records Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
Cmpl?	The Cmpl? (completed) flag is used to denote POs whose processing, in regards to allocating assets, is complete. Check the Cmpl? box and save to indicate that the processing of the highlighted PO is complete. You cannot select PO Line Items from a PO marked as complete. If you wish to modify a completed PO, uncheck the Cmpl? box. Completed records get sorted last in a query.
NP	If you want to indicate that all of the line items (Item #) for the selected PO are non-property, check the NP box in the Purchase Orders block and all of the Item #s in the PO Items Detail block will be marked as non-property (NP). If you check a PO Identifier as NP , you cannot allocate any of the PO Items from that PO. If you mark a particular Item # as NP , you cannot select that particular PO Item for allocation. If you wish to change the non-property status of the PO or PO Item, uncheck the NP box. Non-property POs are sorted last when you query for POs.
PO Identifier	The purchase order identifier containing property items waiting to be allocated.
PO Item Details	
NP	Non-property line item. You cannot allocate non-property line items.
Item #	Line item number of the selected purchase order.
Description	Description of the selected line item.
Quantity Ordered	The quantity ordered for the selected line item.
Quantity Recv'd	The quantity received for the selected line item.
Quantity Assets	The quantity assigned as assets for the selected line item.
UoM	Unit of Measure for the selected line item.
Price	The price per unit of the selected line item.
Label 1 - 30 Value 1 -30	There are up to 30 value and label combinations that you can define to meet your purchasing system requirements and practices. These 30 sets of name/value pairs reside in the following three tables - AS_PO_HEADERS, AS_PO_ITEMS and AS_PO_SUB_ITEMS. Each pairs consists of a label column and a value column. You can define your own names for each field and its associated value. You define your own code in the user-defined <i>as_po_interfaceu</i> package procedures to examine these values and determine if you want to store them in the user-defined fields of the purchase order, the asset value component, or the asset initial event.



INDEX

A

- Acquisition Date
 - field name 1-28, 3-236, 4-357
- Activity Status
 - field name 1-28, 3-236, 4-357
- Activity Type
 - field name 1-28, 3-236, 4-357
- Adjust Capitalized Value screen 2-178
- Agreement
 - retire an 3-268
 - roles 3-192
- Agreement Asset
 - change information 3-249
- Agreement Asset Excess Receivals
 - withdrawing 3-275
- Agreement Asset Ongoing Events
 - maintaining 3-251
- Agreement Asset Sources
 - creating 3-201
 - specifying valid 3-211
- Agreement Asset Summary and History
 - field terms 3-235
- Agreement Asset Summary and History screen 3-233
- Agreement Asset Values
 - transferring 3-255
- Agreement Assets
 - creating 3-224
 - editing 3-247
 - excess 3-272
 - inactivating 3-257
 - maintaining 3-246
 - reinstating 3-270
 - retiring 3-266
- Agreement Assets and Agreements
 - retire 3-264
- Agreement Authorizations
 - specifying 3-215
- Agreement Clerk 3-194
- Agreement Contacts
 - specifying 3-210
- Agreement Manager 3-194
- Agreement Modifications
 - specifying 3-213
 - tracking 3-242
- Agreement Module
 - setup overview 3-195
 - workflow diagram 3-191
- Agreement Module report 3-281
- Agreement Parties
 - specifying 3-208
- Agreement Types
 - creating 3-195
- Agreements
 - closing 3-244
 - creating 3-207
 - editing 3-239
 - Retirement Flow Chart 3-265
 - store text 3-217
- Agreements and Agreement Assets
 - overview 3-190
- Allocate Purchase Order Line Items 9-573
- Alternate Agreement Asset Identifiers
 - defining 3-230
- AS_CATALOGER role 2-151, 4-321
- asset
 - shell 9-565
- Asset Condition
 - field name 4-357
- asset conditions
 - defining 5-389
- asset final event types
 - Personal Asset Provisioning 7-502
- asset initial event types
 - Personal Asset Provisioning 7-500
- Asset Request Number (ASR) 5-408
- asset requests
 - accepting 1-51

Asset Search Report

output 7-549

Asset Search report 1-105

Asset Search screen 1-85, 7-547

Asset Summary and History

field terms 1-27, 4-356

Asset Value

field name 1-28, 3-236, 4-357

assets

issuing 7-531

screening 5-409

transferring 1-45

Assets with Pending Excess/Inactive

Requests report 4-330

authorized users

creating 3-198

B

base assets

creating 6-445

freezing 6-453

linking to existing resolutions 6-455

Batch Excess Assets screen 5-411

batching excess assets 5-411

C

campaign base source 6-446

campaign type 6-442

Capitalize Financial Assets screen 2-173, 2-175

capitalized value

adjusting 2-178

carriers

defining 2-153

Change Agreement Asset Information

screen 3-249

Change Inactive Asset Information screen 4-359

Children

field name 1-11, 1-27, 3-235, 4-342, 4-356

Collapse All

field name 9-594

commodity assets

managing with the Personal Asset Provisioning feature 7-526

commodity stock assets

consolidating 7-545

Condition

field name 1-28, 3-236

consolidating commodity stock assets 7-545

Create Agreement Asset Final Events

screen 3-270

Create Excess Asset Final Events screen 5-427

Create Excess Lot Final Events screen 5-426

Create Financial Asset Final Events

screen 2-182

Create Inactive Asset Final Events screen 4-375

Create Inventory Asset Final Events

screen 1-93

Create Resolutions screen 6-462

Creator Information

field name 1-29, 3-237, 4-358

Current Identifier

field name 1-27, 3-235, 4-356

Custodian

field name 1-29, 3-236, 4-358

D

de-capitalization of an asset

reversing 2-183

de-capitalizing an asset 2-182

Delete Resolutions screen 6-466

Deny Inactive Reveal Request screen 4-329

Direct File Load base source 6-447

Document

field name 1-29, 3-237, 4-358

Drawing Number

field name 1-28, 3-236, 4-357

E

Edit Inventory Asset Interface Records

screen 9-583

Edit Resolution Interface Records screen 6-469

Effective Date

field name 1-28, 3-236, 4-357

excess asset final events

creating 5-427

Excess Asset report 1-87, 1-144

- excess asset reservations
 - adjusting 5-419
 - creating 1-90, 3-279, 5-417
 - managing 5-417
- excess assets
 - batching 5-411
 - creating 5-400
 - creating from an excess receival request 5-408
 - retiring 5-421
 - utilize 1-84, 3-276
- excess assets final events
 - reversing 5-429
- Excess Clerk 5-386
- excess lot final events
 - recording 5-426
- Excess Manager 5-386
- Excess Module
 - menu access 5-385
 - roles 5-384
 - setup 5-387
 - workflow 5-383
- Excess Receival Form report 5-405
 - overview 5-405
- excess receival request
 - withdrawing 4-373
- Excess Receival Request screen 5-404
- excess review categories
 - defining 5-387
- excess review requirements
 - defining 5-396
- excess review rules
 - defining 5-391
- excess review types
 - defining 5-394
- Excess/Inactive Receival Form report 4-333
- Executive Review Resolution Summary
 - report 6-482
- Expected Return Date
 - field name 1-28, 3-236, 4-357
- Extend Excess Asset/Batch Review screen 5-416

F

- Final Event
 - field name 1-28, 3-236, 4-357
- Finance Clerk role 2-151
- Finance Manager role 2-151
- Finance Module menu access 2-151
- Finance Module workflow 2-149
- Financial Asset Summary and History
 - screen 2-171
- financial assets
 - creating 2-168
 - setting up 2-152
- financial calendar
 - defining 2-155
- financial transactions
 - view 2-185
- Flags
 - field name 1-28, 3-236, 4-357

G

- Global User Fields
 - field name 1-29, 3-237, 4-358

I

- Identifier
 - field name 1-27, 3-235, 4-356
- Identifier Type
 - field name 1-27, 3-235, 4-356
- inactive asset details
 - editing 4-359
- inactive asset excess receival
 - requesting 4-371
- inactive asset final event
 - creating 4-375
- inactive asset final events
 - reversing 4-377
- inactive asset redeployment
 - requesting 4-367
- Inactive Asset Summary and History
 - screen 4-351
- inactive assets
 - creating

- overview 4-336
- introduction 4-317
- re-deploy 1-74
- retire 4-374
- searching for 4-364
- Inactive Assets report 4-361
- Inactive Module
 - menu access 4-321
 - roles 4-320
 - workflow 4-319
- inactive receival requests
 - accepting 4-326
 - creating 4-323
 - denying 4-329
 - overview 4-322
 - withdrawing 1-70, 4-325
- inactive redeployment requests
 - withdraw 1-76
 - withdrawing 4-369
- Include History
 - field name 1-27, 3-235, 4-356
- Initial Event
 - field name 1-28, 3-236, 4-357
- Inventory Asset Activity Summary by Asset Type report 1-111
- Inventory Asset Activity Summary by Flag report 1-109
- inventory asset details
 - view 1-22
- inventory asset excess receivals
 - requesting 1-78
 - withdrawing 1-80
- Inventory Asset Final Events report 1-97, 1-113
- Inventory Asset History report 1-116
- Inventory Asset Inactive Receival Request 1-68
- Inventory Asset Initial Events report 1-118
- Inventory Asset Interface Processing Results report 1-121
- Inventory Asset Management
 - workflow diagram 1-3
- inventory asset ongoing events 1-62
- Inventory Asset Ongoing Events report 1-123
- inventory asset records
 - editing 1-30
- inventory asset requests
 - closing 1-55

- Inventory Asset Summary and History screen 1-22
- Inventory Asset Summary by Asset Flag report 1-126
- Inventory Asset Summary by Asset Type report 1-128
- Inventory Asset Timeline report 1-130
- Inventory Asset User Fields 1-64
- Inventory Asset Utilization report 1-132
- inventory asset value
 - transferring 1-61
- inventory assets
 - changing information 1-31
 - excess 1-77
 - inactivating 1-66
 - maintaining 1-21
 - reactivating 1-100
 - retiring 1-92
 - transferring value 1-61
- Inventory Assets (Global Information) report 1-103
- inventory assets introduction 1-1
- Inventory Assets Pending Acceptance by Age report 1-135
- Inventory Assets Pending Release by Age report 1-137
- Inventory Assets with Recently Denied Requests report 1-71, 1-81
- issue and return points
 - creating 7-513
 - maintaining
 - level one structures 7-516
 - level two structures 7-518
 - site location 7-514
 - selecting a location 7-530
- IT Components introduction 8-561

J

- Journal Entry Rules
 - defining 2-164
- Journal Entry Templates
 - defining 2-160
- Journal Event History screen 2-185

L

- Ledger Batch Assignments
 - defining 2-166

- Ledger Batches
 - creating 2-158
- Location
 - field name 1-29, 3-237, 4-358
- Lookup Resolutions screen 6-464
- lost, stolen or damaged
 - stock assets 7-542
- lot masters
 - adding lots to 5-424
 - creating 5-422
- M**
- Maintain Agreement Assets screen 3-224
- Maintain Agreement Authorizations screen 3-198
- Maintain Agreement Ongoing Events
 - screen 3-251
- Maintain Agreements screen 3-208
- Maintain Base Frozen Statuses screen 6-453
- Maintain Excess Asset Reservations
 - screen 5-419
- Maintain Excess Assets screen 5-408
- Maintain Excess Lot Masters screen 5-422
- Maintain Excess Lots screen 5-424
- Maintain Excess Review Requirements
 - screen 5-396
- Maintain Excess Review Rules screen 5-391
- Maintain Financial Assets screen 2-169
- Maintain FY and Accounting Periods
 - screen 2-156
- Maintain Inactive Assets
 - field terms 4-341, 4-346
- Maintain Inventory Assets
 - field terms 1-10, 1-15
- Maintain Journal Entry Rules screen 2-164
- Maintain Journal Entry Templates screen 2-161
- Maintain Ledger Batch Assignments
 - screen 2-166
- Maintain Ledger Batches screen 2-158
- Maintain Review Accruals screen 6-457
- Maintain Review Base screen 6-449
- Maintain Review Campaigns screen 6-442
- Maintain Valid Agreement Asset
 - Classifications screen 3-204
- maintain valid asset events
 - Personal Asset Provisioning 7-507
- Maintain Valid Asset Events screen 7-504
- Maintain Valid Resolution Types screen 6-460
- manage agreements by type 3-198
- manage specific agreements 3-200
- Managed By
 - field name 1-28, 3-236, 4-357
- Management Module
 - roles 1-4
- Manufacturer
 - field name 1-27, 3-235, 4-356
- Menu Access
 - Agreement Module 3-193
 - Management Module 1-5
- Model Name
 - field name 1-27, 3-235, 4-357
- Model Number
 - field name 1-27, 3-235, 4-356
- modifications
 - track 3-241
- O**
- Object Audit
 - log 3-241
- Object Audit Log screen 3-243
- Object Audit Status screen 3-241
- Official Name
 - field name 1-27, 3-235, 4-356
- Owner
 - field name 1-28, 3-236, 4-357
- P**
- Parents
 - field name 1-11, 1-27, 3-235, 4-341, 4-356
- Personal Asset Provisioning
 - overview 7-494
- Personal Asset Provisioning feature
 - managing commodity assets 7-526

- Personal Asset Provisioning introduction 7-493
- Personal Asset Provisioning Manager role 7-496
- Personal Asset Provisioning roles 7-495
- PO Interface
 - duplication feature 9-587
 - overview 9-564
 - records process 9-565
- Population sample type 6-448
- Process Inventory Asset PO Interface
 - Records screen 9-571
- Process Load Resolutions screen 6-468
- Prompt
 - Possessive
 - field name 9-594
- Purchase Order Aging report 1-141

- R**
- Random Sample 6-448
- reactivating a stock asset
 - stock asset
 - reactivating 7-557
- Record Uncapitalized Reason screen 2-177
- Release and Accept New Assets 1-19
- Relink Base Assets with Resolutions
 - screen 6-455
- Rep
 - field name 1-29, 3-236, 4-358

- reports
 - Agreement Module 3-281
 - Asset Search 1-105
 - Assets with Pending Excess/Inactive Requests 4-330
 - Excess Asset 1-87, 1-144
 - Excess Receival Form 5-405
 - Excess/Inactive Receival Form 4-333
 - Executive Review Resolution Summary 6-482
 - Inactive Assets 4-361
 - Inventory Asset Activity Summary by Asset Type 1-111
 - Inventory Asset Activity Summary by Flag 1-109
 - Inventory Asset Final Events 1-97, 1-113
 - Inventory Asset History 1-116
 - Inventory Asset Initial Events 1-118
 - Inventory Asset Interface Processing Results 1-121
 - Inventory Asset Ongoing Events 1-123
 - Inventory Asset Summary by Asset Flag 1-126
 - Inventory Asset Summary by Asset Type 1-128
 - Inventory Asset Timeline 1-130
 - Inventory Asset Utilization 1-132
 - Inventory Assets (Global Information) 1-103
 - Inventory Assets Pending Acceptance by Age 1-135
 - Inventory Assets Pending Release by Age 1-137
 - Inventory Assets with Recently Denied Requests 1-71, 1-81
 - Purchase Order Aging 1-141
 - Review Campaign Base Assets 6-485
 - Review Campaign Base Assets with Resolution Information 6-488
 - Review Campaign Properties 6-475
 - Review Resolution Summary 6-479
 - Request Agreement Asset Excess Receival 3-273
 - Request Agreement Asset Inactive Receival screen 3-258
 - Request Inactive Asset Excess Receival screen 4-372
 - Request Inactive Asset Redeployment screen 3-261, 4-367
 - Request New Steward 1-49
 - Requests
 - deny 1-57
 - withdraw 1-58

- Resolution Types
 - defining valid 6-459
 - resolutions
 - creating 6-462
 - Responsibility Date
 - field name 1-28, 3-236, 4-357
 - review bases
 - generating 6-449
 - Review Campaign Base Assets report 6-485
 - Review Campaign Base Assets with
 - Resolution Information report 6-488
 - Review Campaign Properties report 6-475
 - review campaigns
 - closing 6-472
 - creating 6-441
 - managing 6-440
 - Review Module
 - introduction 6-433
 - Review Resolution Summary report 6-479
 - roles
 - Agreement 3-192
 - AS_CATALOGER 2-151
 - Excess Module 5-384
 - Finance Clerk 2-151
 - Finance Manager 2-151
 - Finance module
 - overview 2-150
 - Inactive Module 4-320
 - Management Module 1-4
 - Rule Based base source 6-446
- S**
- screening assets 5-409
 - screening periods
 - defining 5-411
 - Search 1-101
 - Serial Number
 - field name 1-28, 3-236, 4-357
 - Shell Asset 1-7
 - Steward
 - field name 1-28, 3-236, 4-358
 - Stock Asset Management self-service html
 - transaction pages 7-528
 - Stock Asset Query Criteria Page 7-533
 - stock asset transactions 7-528
 - stock assets
 - exchanging 7-539
 - lost, stolen or damaged 7-542
 - retiring 7-550
 - returning 7-536
 - returning and exchanging
 - overview 7-535
 - storage
 - send an asset to 1-67
 - Sunflower Assets
 - overview 9-563
 - Sunflower Assets User Guide
 - preface i-xv
 - System Parameter
 - AUTOPROCPO 9-568
- T**
- Term Set
 - field name 9-594
 - Transfer Agreement Asset Value screen 3-255
 - transfer assets 1-45
 - Transfer Capital Value screen 2-180
- U**
- uncapitalized reason
 - recording 2-177
 - Unique Identifier
 - field name 1-27, 3-235, 4-356
 - User
 - field name 1-29, 3-237, 4-358
 - User Created SQL base source 6-448
 - User Fields
 - field name 1-28, 1-29, 3-236, 3-237, 4-357, 4-358
- W**
- Withdraw Excess Receival Request screen 4-373
 - Withdraw Inactive Receival Request
 - screen 3-260, 4-325
 - Withdraw Inactive Redeployment Request
 - screen 3-263, 4-369

SunflowerEnterprise



www.sunflowersystems.com

Need Sunflower Systems Training?

For updates and refresher courses visit us at

<http://www.sunflowersystems.com/services/education/index.html>

Training Questions?

Contact Sunflower Education Services at

training@sunflowersystems.com