SF4.5

Sunflower Systems Training

Department of Commerce

ITA and NTIS

September and October 2007

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Chapter 1: Introduction

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Course Objectives

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After this course you should be able to:

- Explain Sunflower System's functionality
- Create assets using the Maintain Inventory Assets form
- View property record history and information
- Update property record information
- Transfer property
- Create and conduct an inventory campaign
- Create and withdraw excess requests
- Retire assets with appropriate final events
- Define Administrator duties

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Lesson Objectives

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After this lesson you should be able to:

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

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DOC and Sunflower Systems

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- Tracks all property assets.
- Currently used by NOAA and OS.
- Phase I:
  - ITA
    - ITA Headquarters (Washington DC)
    - ITA Domestic (domestic field offices)
    - ITA International (all internationals posts)
  - NTIS
- Phase II:
  - NIST
  - PTO
  - Census

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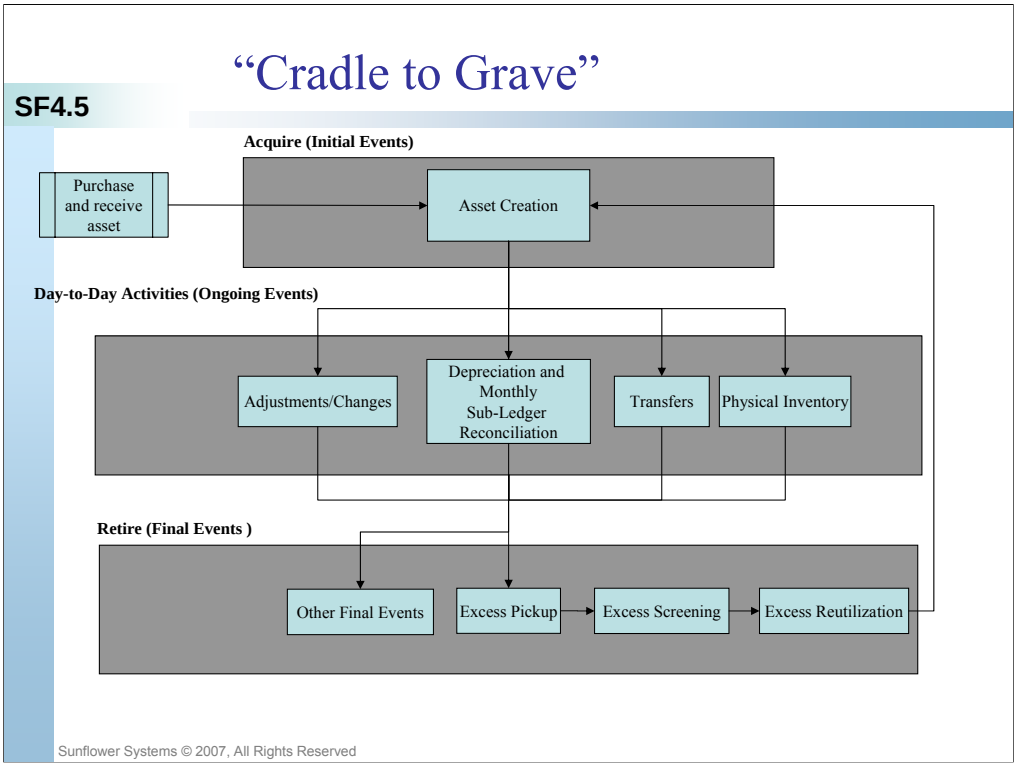
Sunflower Systems enables asset management utilizing a cradle-to-grave process. Users are able to account for and manage their assets from the time of acquisition through disposal. A complete history is maintained as records are easily updated to reflect any changes (location, user, value, etc.). Users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

Currently, two Bureaus (NOAA and the Office of the Secretary) at the Department of Commerce (DOC) are using Sunflower Systems. ITA and NTIS are being brought on line in this phase of deployment. Shortly after, the remaining DOC bureaus will be added to the system.

Currently, ITA has approximately 15,000 assets. Most of their capital assets are in the international sector and primarily consist of vehicles. NTIS has about 850 assets, 215 of which are capital.



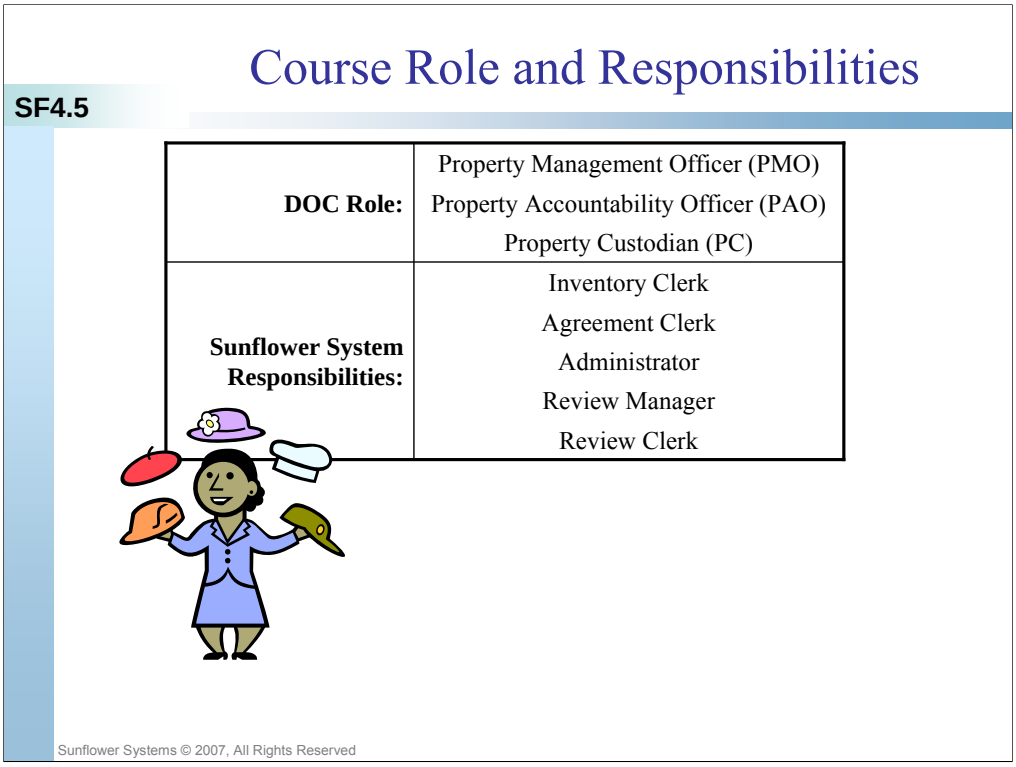
The Sunflower Property system uses **Event Types** to describe the methods by which accountable property is acquired, disposed of, and maintained throughout their life. Event Types are categorized as either initial, ongoing, or final events. Once created, the event type (e.g. initial and final event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

Initial Events – e.g. ***Purchase***

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

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

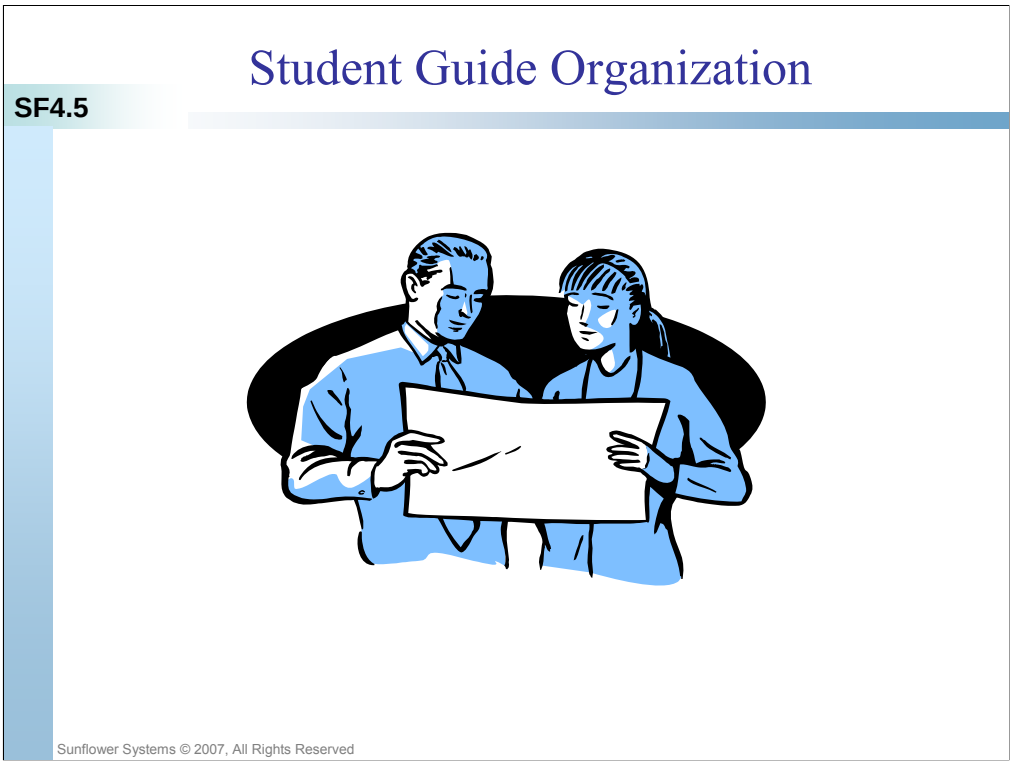
Note: Once an asset is retired, the property record remains in Sunflower and shows the appropriate final event. Any retired asset can be reinstated at a later date, if appropriate.



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

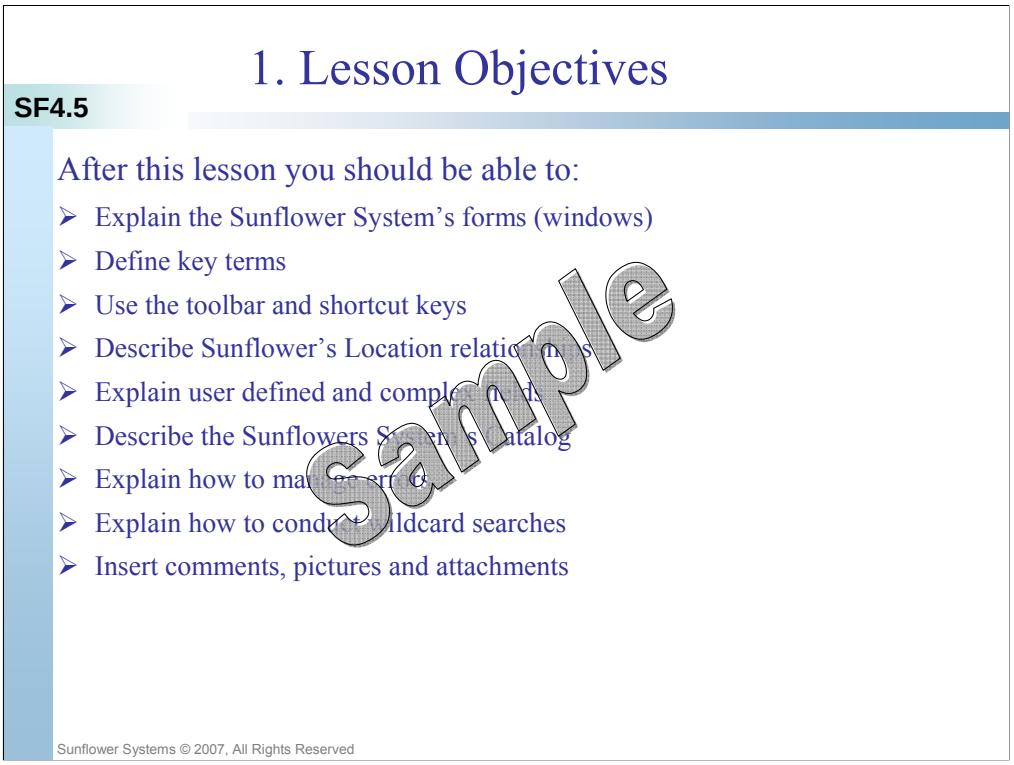
To perform these business functions, PMOs, PAOs and PCs use the **Sunflower System Responsibility** called ***Inventory Clerk, Agreement Clerk, Administrator, Review Manager*** and ***Review Clerk*** and the computer system called ***Sunflower Assets,*** or ***Sunflower*** for short.

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

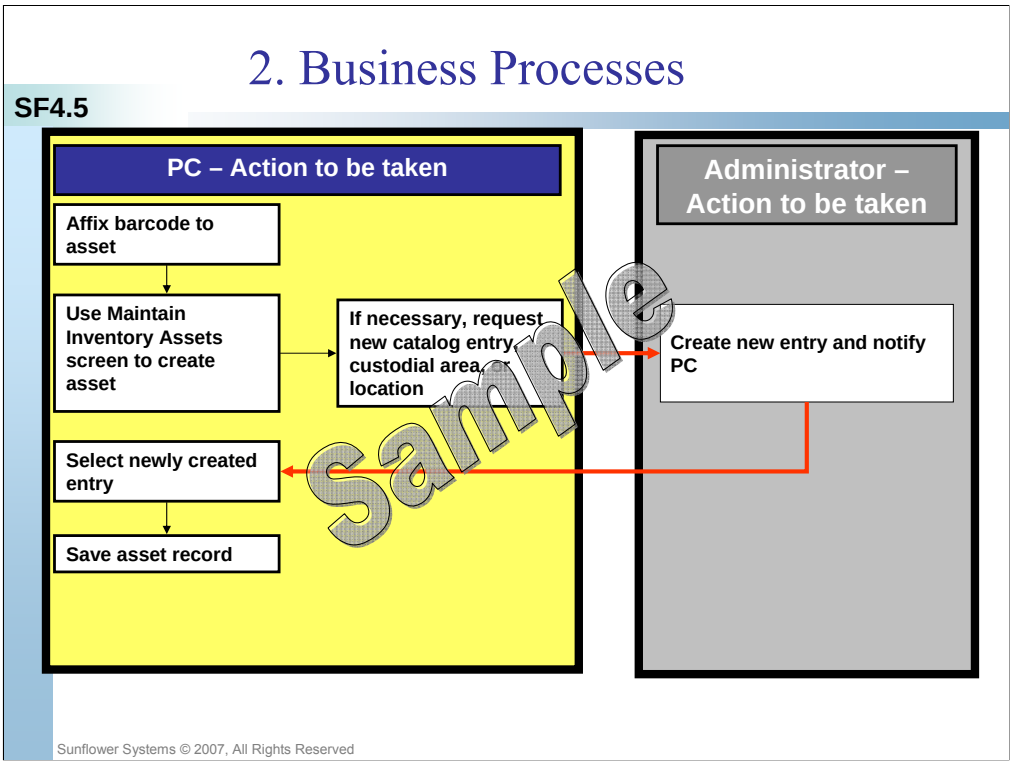


Each chapter or lesson in the Student Guide follows a consistent pattern. It contains the common elements below, which we will look at in this chapter.

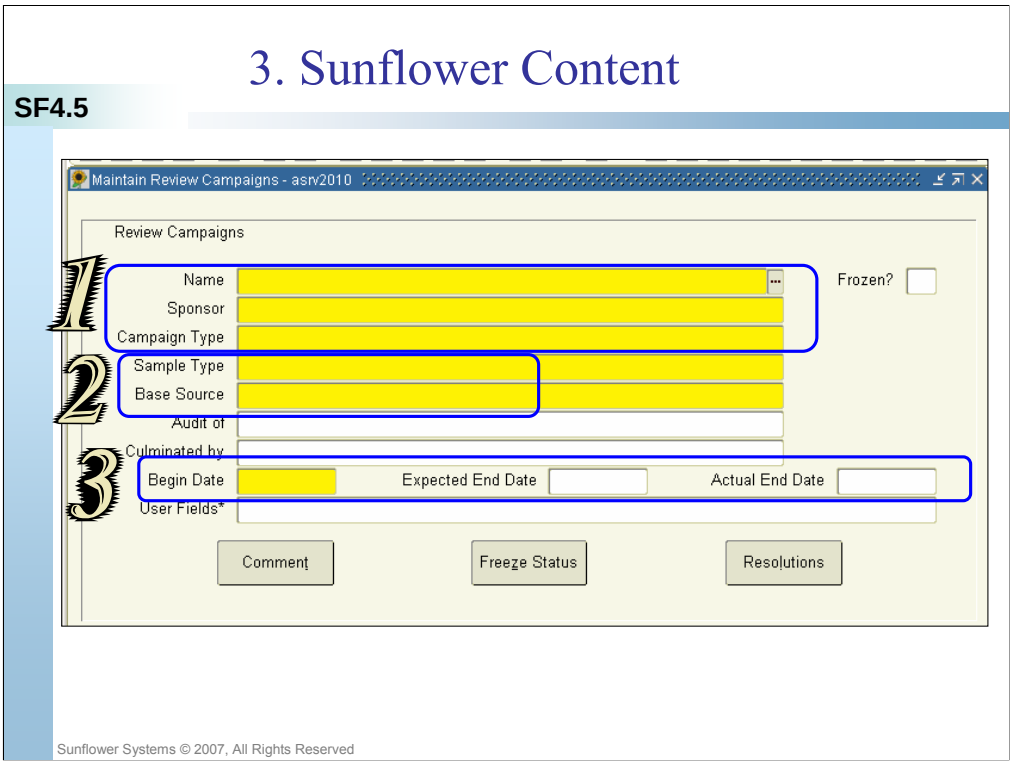
1. Lesson Objectives
2. Business Processes
3. Sunflower Content
4. Navigations
5. Labs
6. Lesson Summary



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

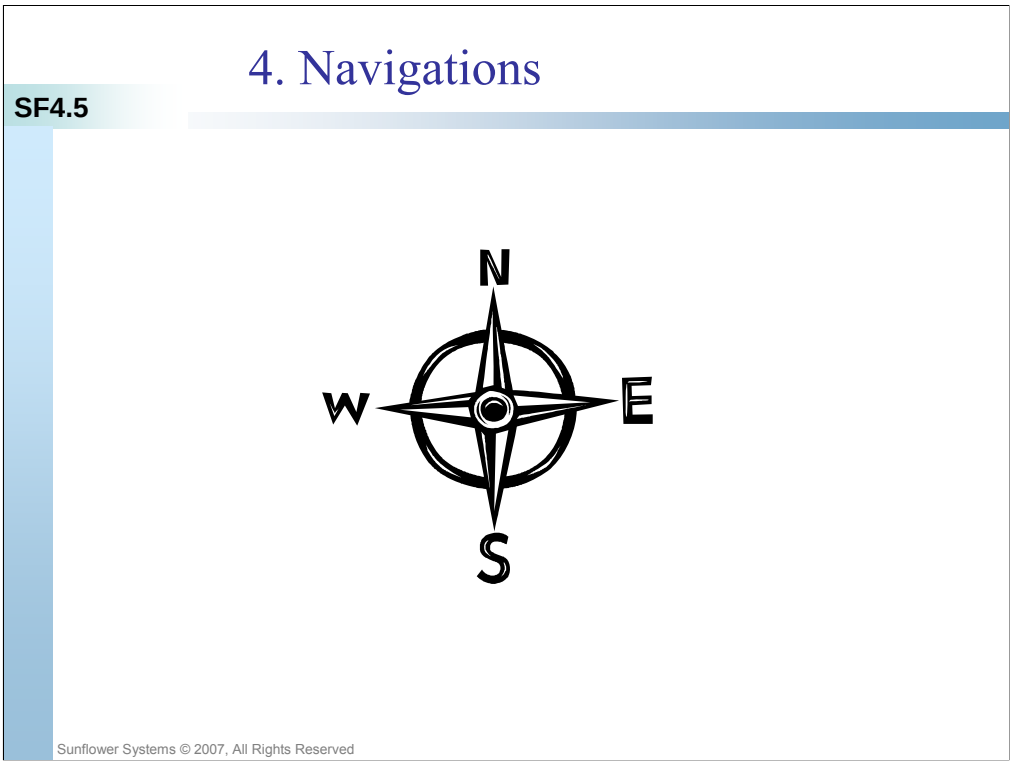


Here we see a flowchart describing a high level business process. Before actually looking into the Sunflower applications screens, we prefer to try to get the "big picture" from a business perspective.



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

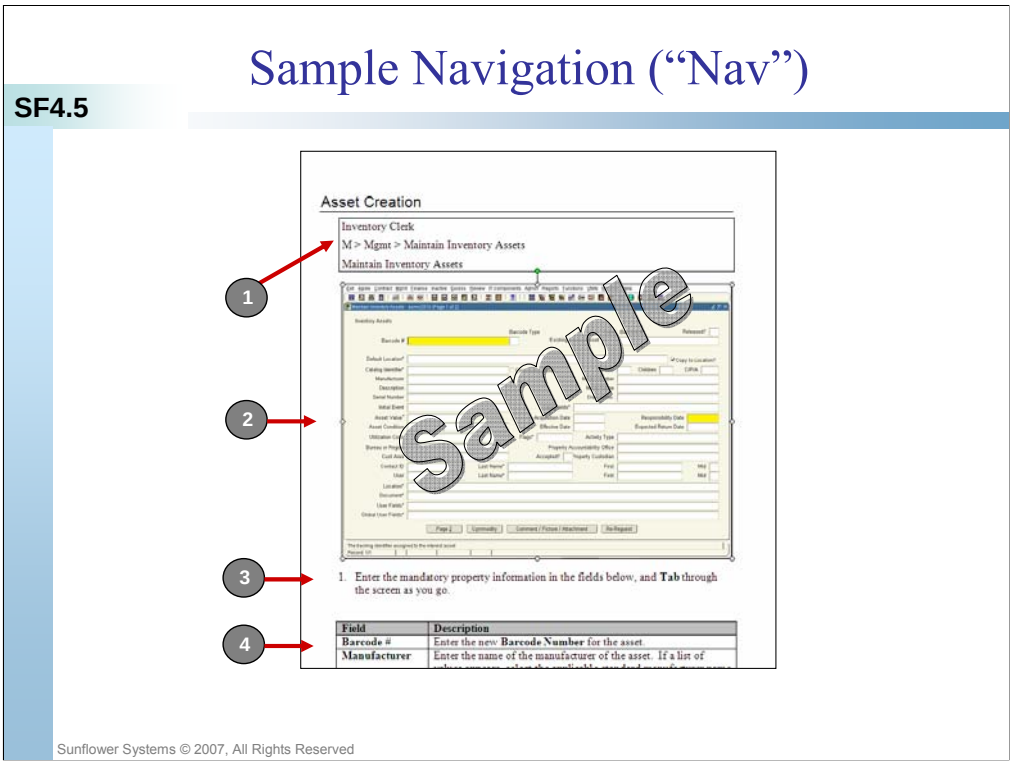
Note: Some Sunflower content will not be covered in the class, but is included for *reference purposes only*. A good example is a Sunflower function that is only used by a very small handful of users at the DOC. In this case, information is included on this topic which can be referred to at a future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



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

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

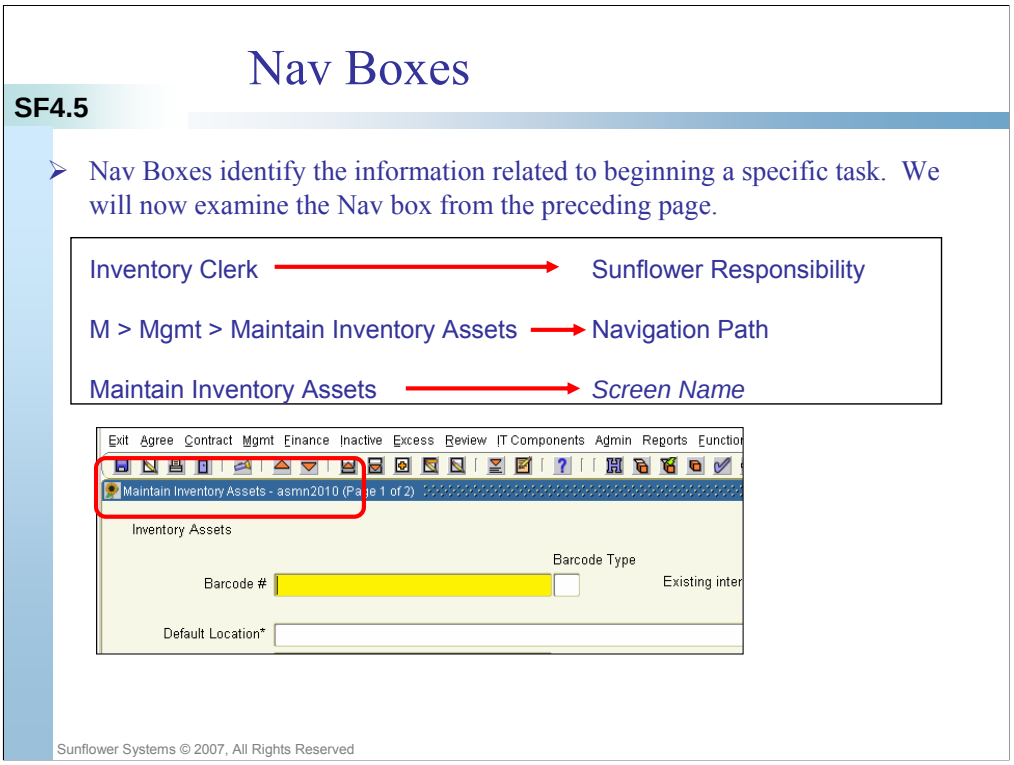
Let's take a look at a sample Nav…



Below are some comment elements of a Nav:

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

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



Nav Boxes are ordered as follows:

1. **Sunflower Responsibility**

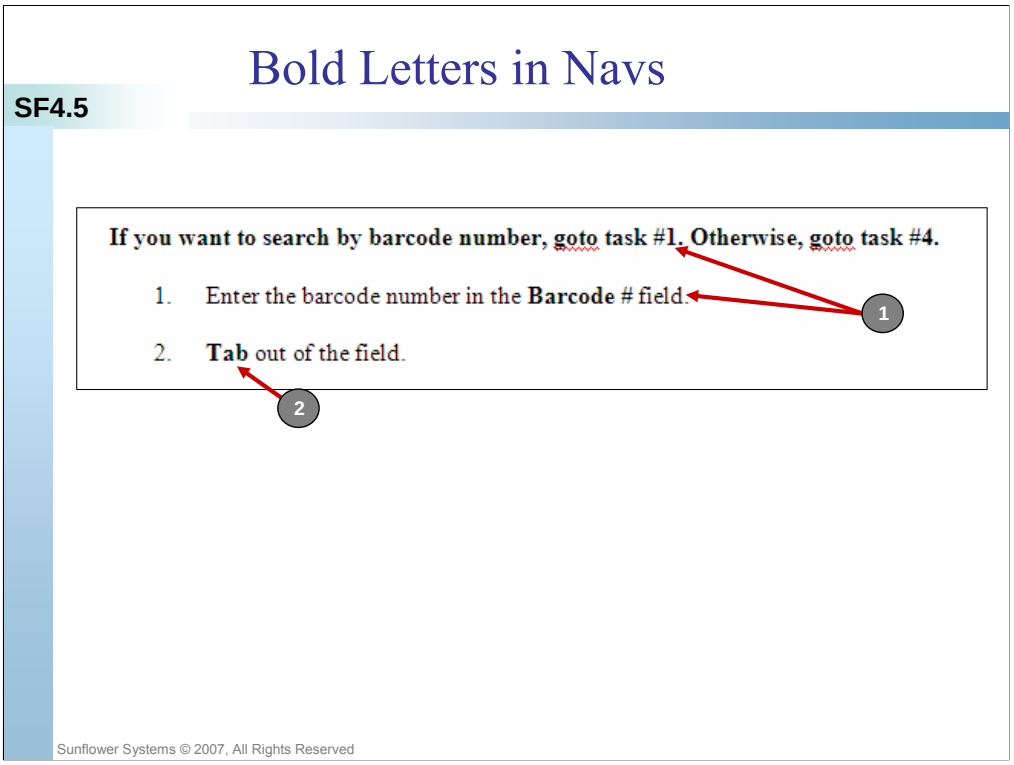
- The responsibility gives you access to a specific set of Sunflower windows, menus, reports and data.

2. **Navigation Path**

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

3. **Screen Name**

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



Bold letters in Navs can mean one of two things:

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

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Nav Tables

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

Sample

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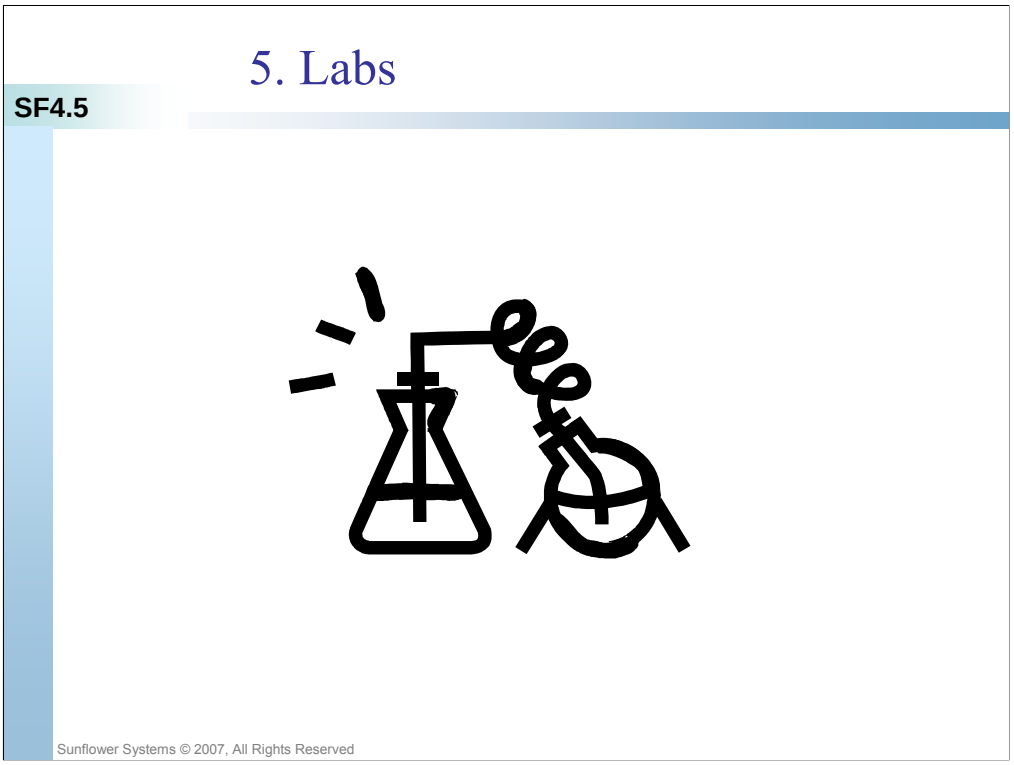
Nav Tables contain a block of fields available for data entry. A few comments:

•The **non-shaded** fields (with white background) indicate that an entry is required.

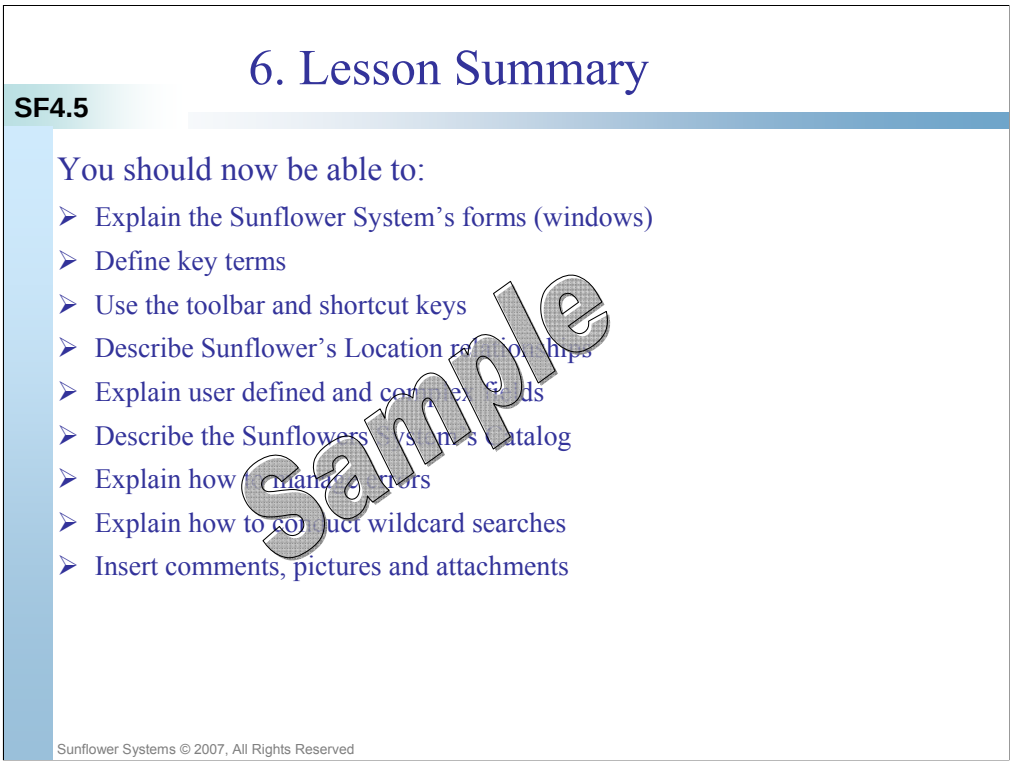
•The **shaded** fields (with gray background) indicate the entry is optional or a default value.

•If a screen field is not referenced in a table, it is not needed.



• Labs are required activities designed to reinforce lesson objectives with hands-on practice.

• You will need the corresponding Navigation to complete a particular Lab.



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

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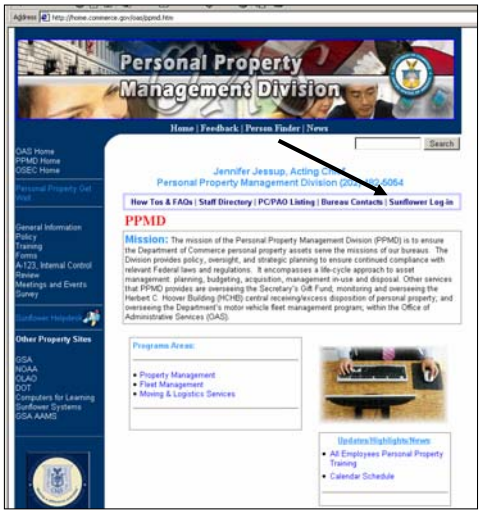
Login to Sunflower

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



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

Use the DOC website **http://home.commerce.gov/oas/ppmd.htm** to access Sunflower.

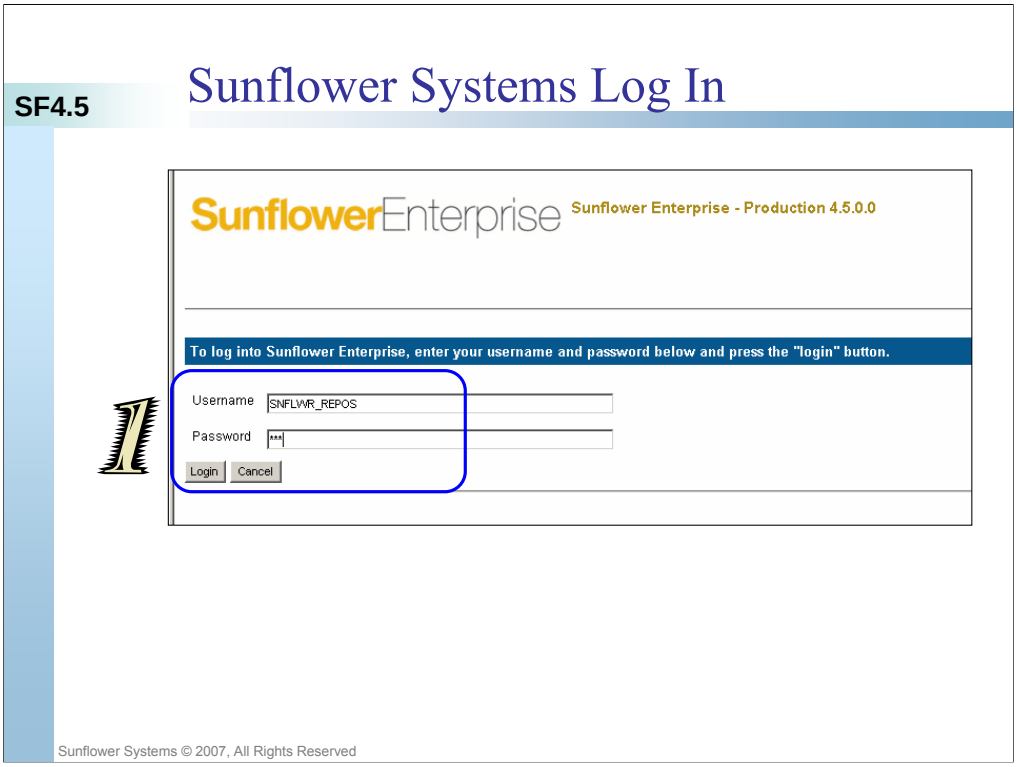
There are certain system requirements for using Sunflower. Please work with your IT Support to verify that the following is installed on your computer:

•Java

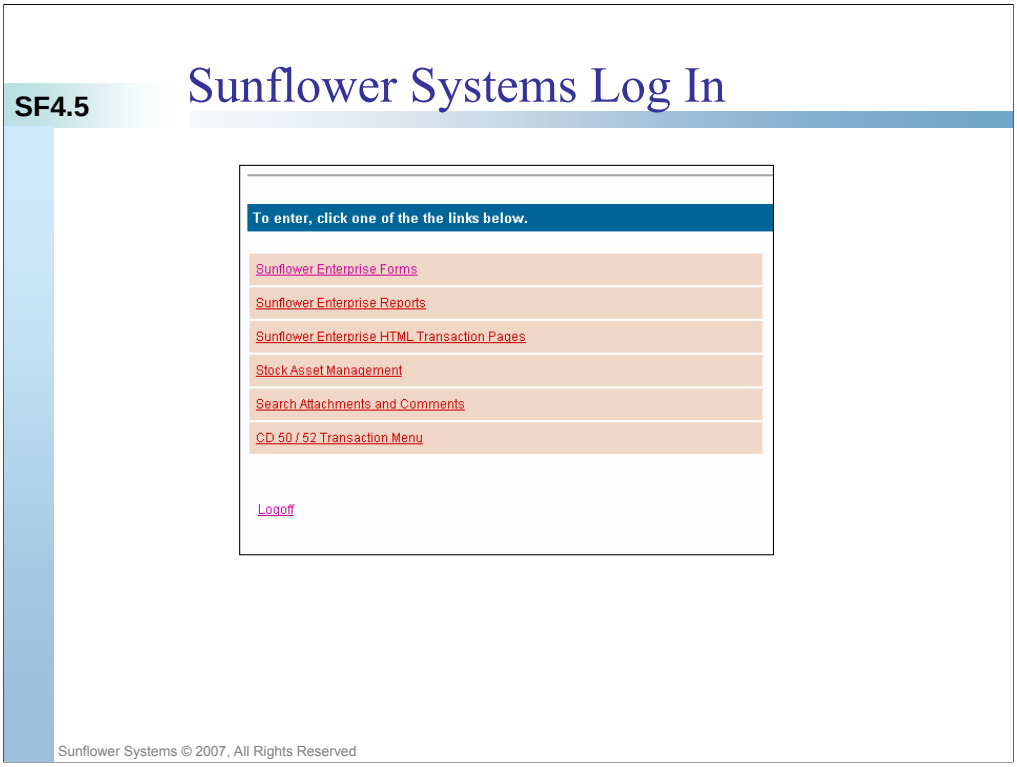
•Internet Explorer web browser

•Jinitiator

•Allow pop-ups



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



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

Sunflower Enterprise Forms opens the windows used for data entry.
Sunflower Enterprise Reports opens a screen to run Adobe Acrobat reports.
CD 50 / 52 Transaction Menu is used to request and approve/deny retirement of assets.

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

Lesson Summary

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You should now be able to:

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

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Notes:

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Chapter 2:
Sunflower Systems Basics

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Lesson Objectives

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After this lesson you should be able to:

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

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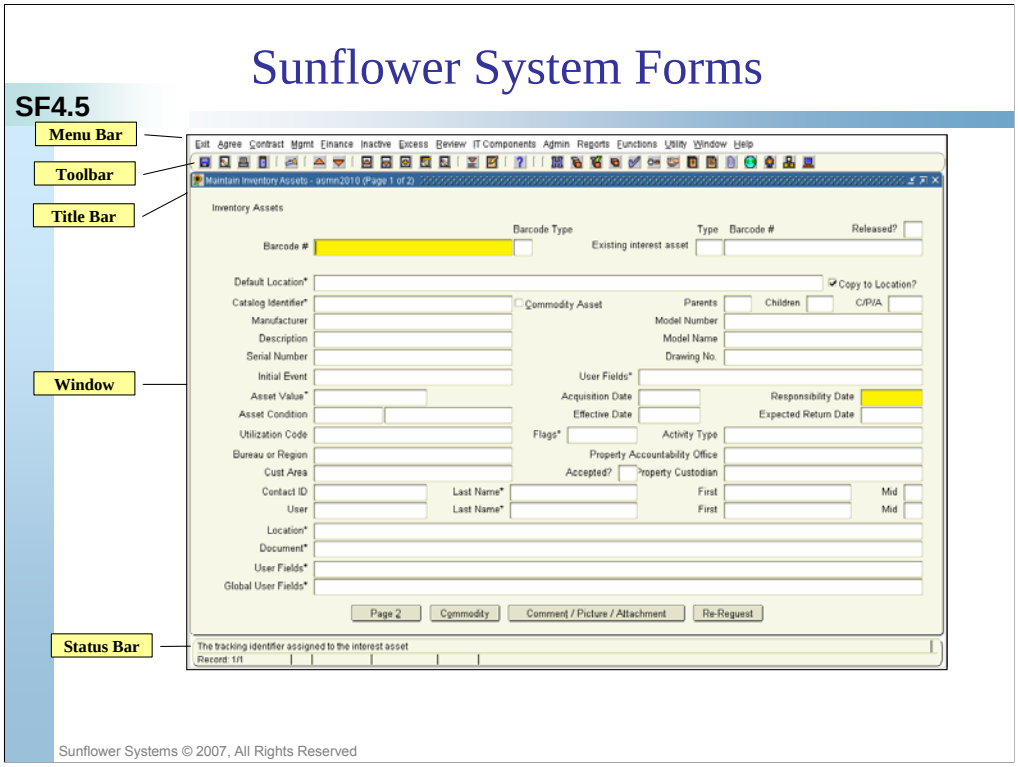

Sunflower Assets, is designed to operate in a Web-enabled environment. It is important to understand the terminology of the components within the Sunflower Assets application forms. The window (screen, page, panel, etc.) is commonly referred to as a form. Other common terms are listed on the following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

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

Key Terms and Definitions

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

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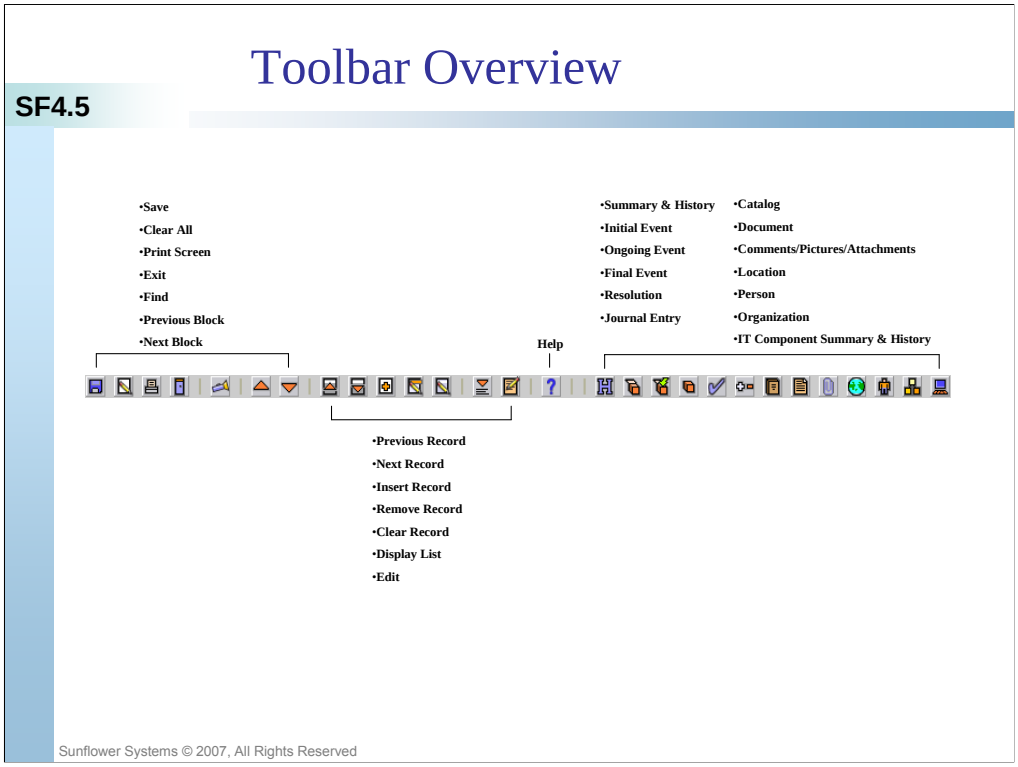

The tool bar is a collection of buttons (or icons) that perform specific actions when you select them. Each tool bar button replicates a menu bar action. Depending on the context of the current field or window, a tool bar button may be active or inactive. Display help, or a tool tip for an active tool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

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

Toolbar Buttons and Shortcuts

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

FUNCTION	KEY
Clear Block	F7
Clear Field	F5
Clear Form	F8
Clear Record	F6
Commit/Save	F10 or Ctrl+S
Count Query	F12
Delete Record	Ctrl+Up
Display Error	Shift+Ctrl+E
Duplicate Field	Shift+F5
Duplicate Record	Shift+F6
Edit	Ctrl+E

FUNCTION	KEY
Enter Query	F11
Execute Query	Ctrl+F11
Exit	F4
Help	Ctrl+H
Insert Record	Ctrl+Down
List of Values	Ctrl+L
List Tab Pages	F2
Next Block	Shift+PageDown
Next Field	Tab
Next Primary Key	Shift+F7
Next Record	Down

FUNCTION	KEY
Next Set of Records	Shift+F8
Previous Block	Shift+PageUp
Previous Field	Shift+Tab
Previous Record	Up
Print	Ctrl+P
Page Down	Scroll Down
Page Up	Scroll Up
Return	Return
Show Keys	Ctrl+K
Update Record	Ctrl+U

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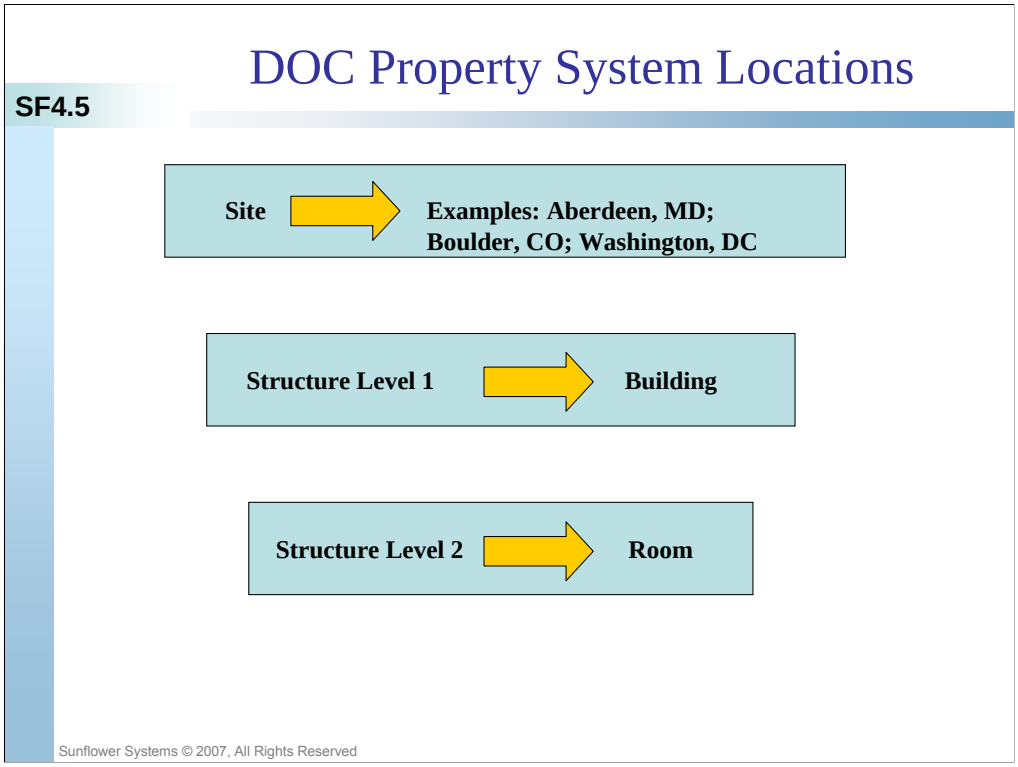
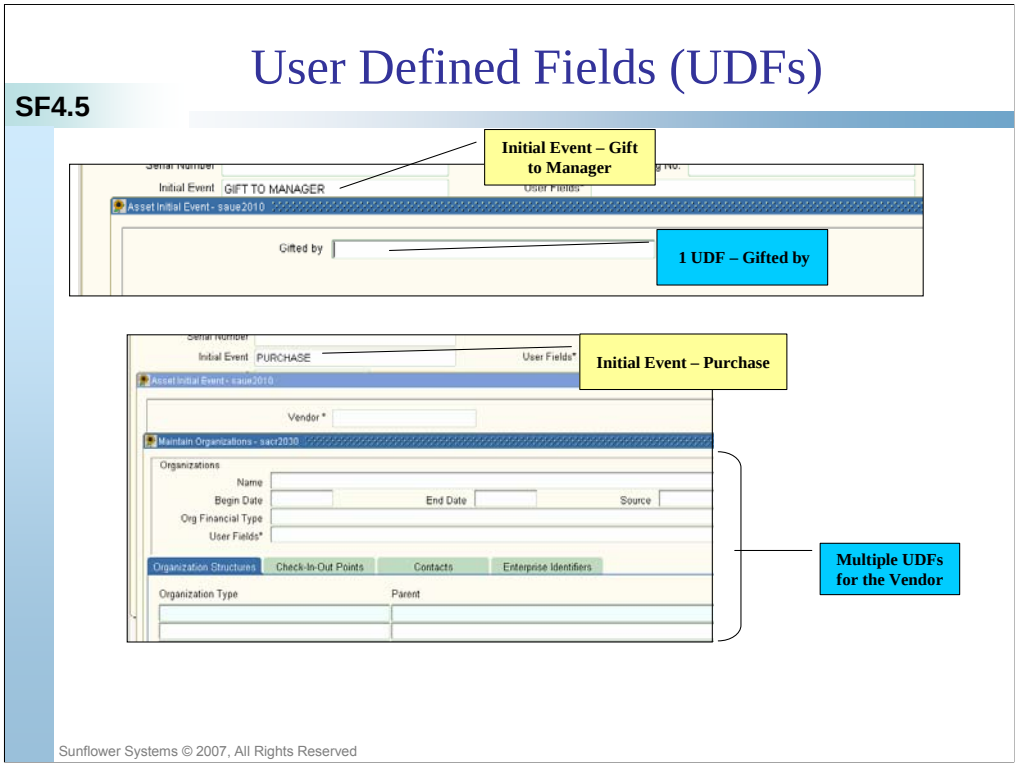
Note: Copy (Ctrl+C) and Paste (Crtl+V) may also be available.

See Appendix for Job Aid.



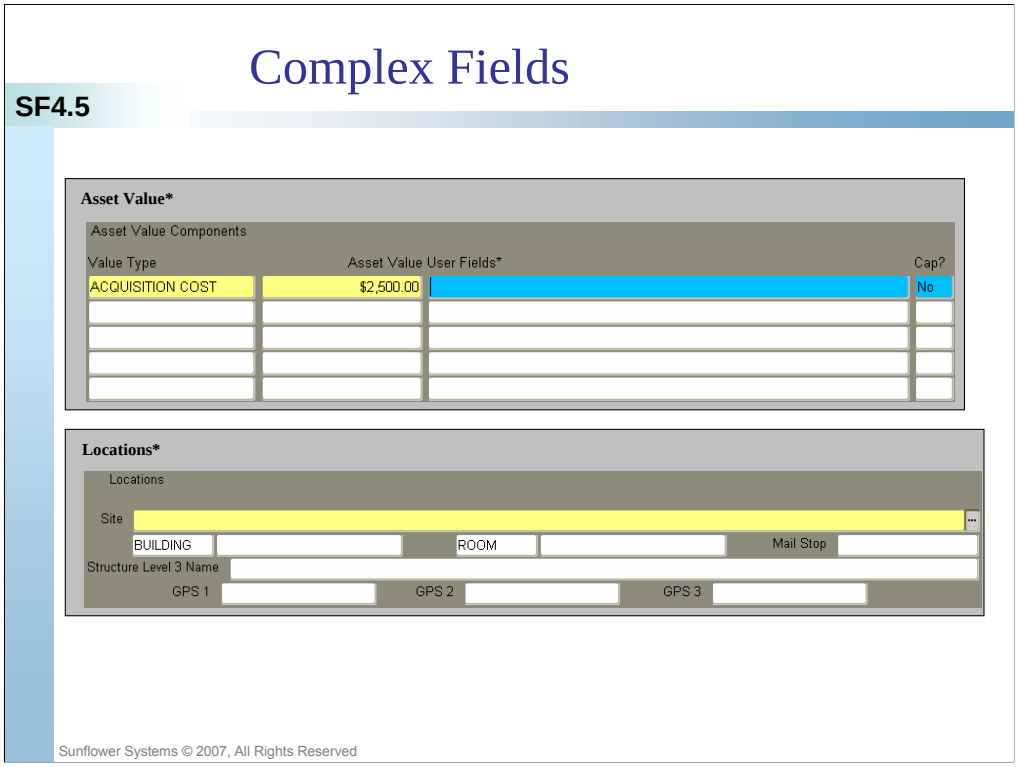
A Location is mandatory when creating a property record. Sunflower uses Sites and Structure Levels to define the location of an asset. For the DOC, Sites are geographic locations (e.g. ***Aberdeen, MD; Boulder, CO; Washington, DC***). Structure Level 1 is **Buildings** (e.g. ***Ronald Reagan***). Structure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

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



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

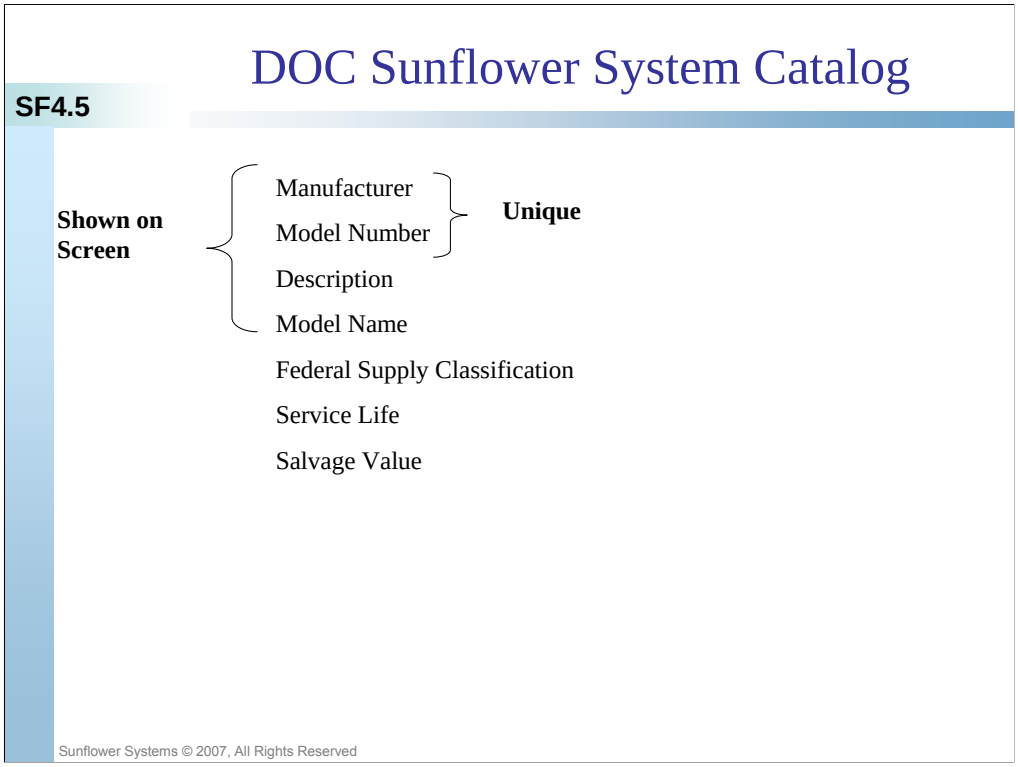
<u>Note:</u> Not all UDFs contain information, meaning that these UDFs are not being utilized by the DOC and are therefore not mandatory. If a user attempts to launch these 'unextended' UDFs, an error message similar to the following will be displayed: "Context does not extend the field." This is okay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



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

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

Remember: COMPLEX FIELDS = FIELD NAME + *



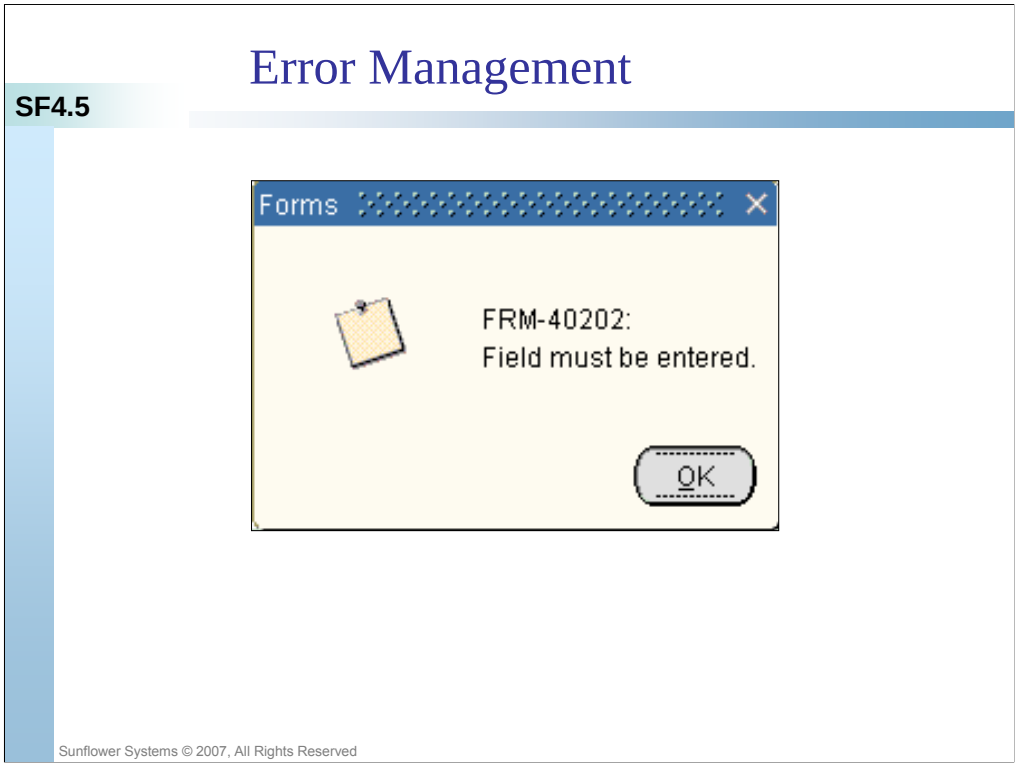
The property catalog stores data common to a property item's **Manufacturer** and **Model** number. The catalog is based on the manufacturer's lists, and is updated frequently to reflect new products. Having a more detailed centralized catalog enables you to have a uniform way to enter **Manufacturer**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

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

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

Manufacturer - Palm Computing Inc.	Model - PALMV
Manufacturer - Palm Computing Inc.	Model - PALM V
Manufacturer - Palm Computing Inc.	Model – PALM 5

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



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

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

Error Management (continued)

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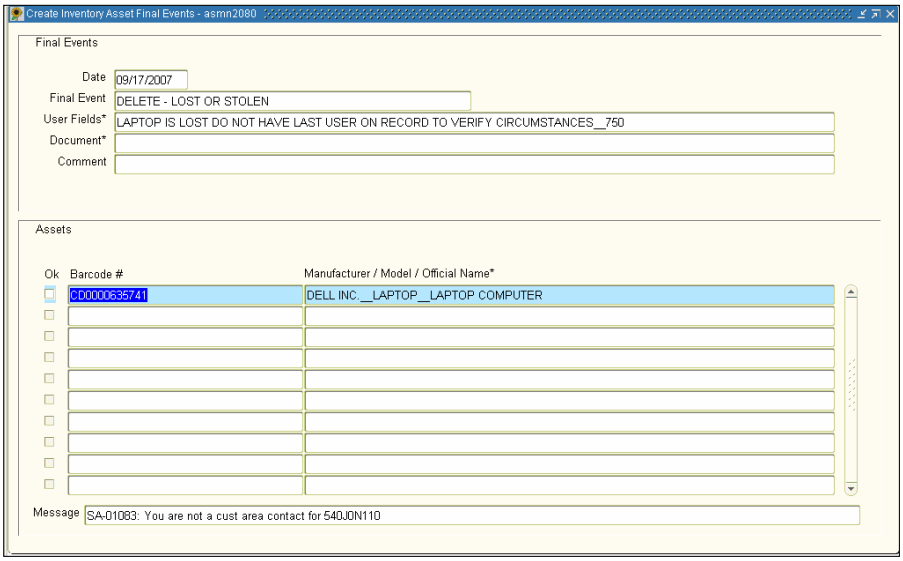

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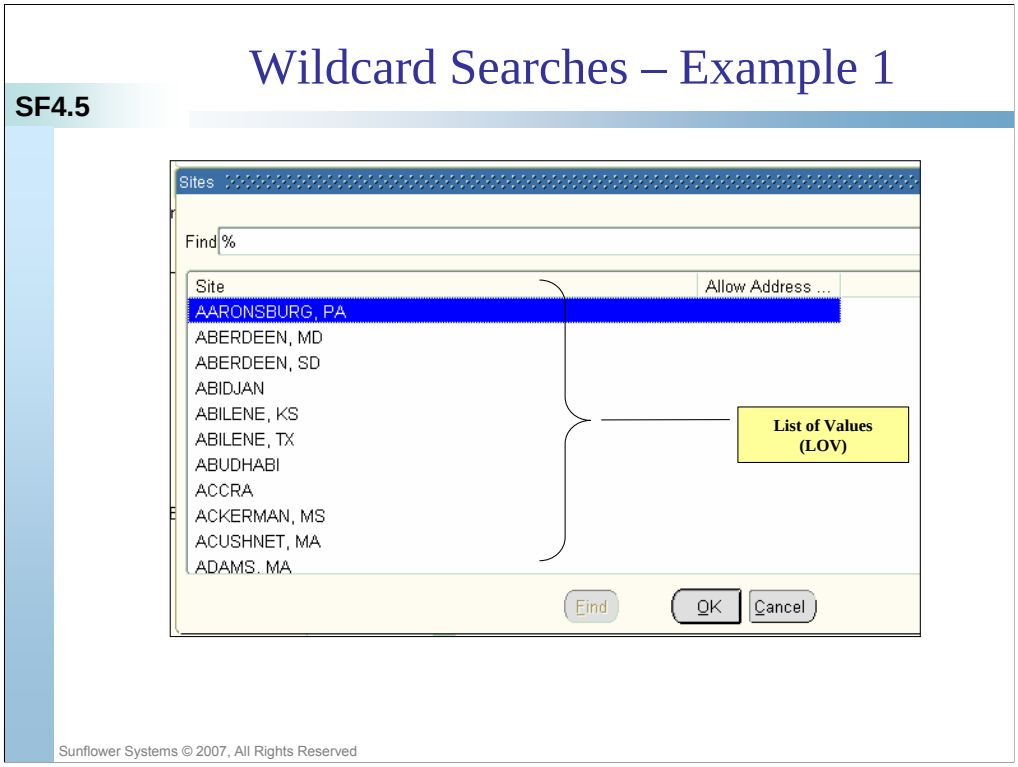
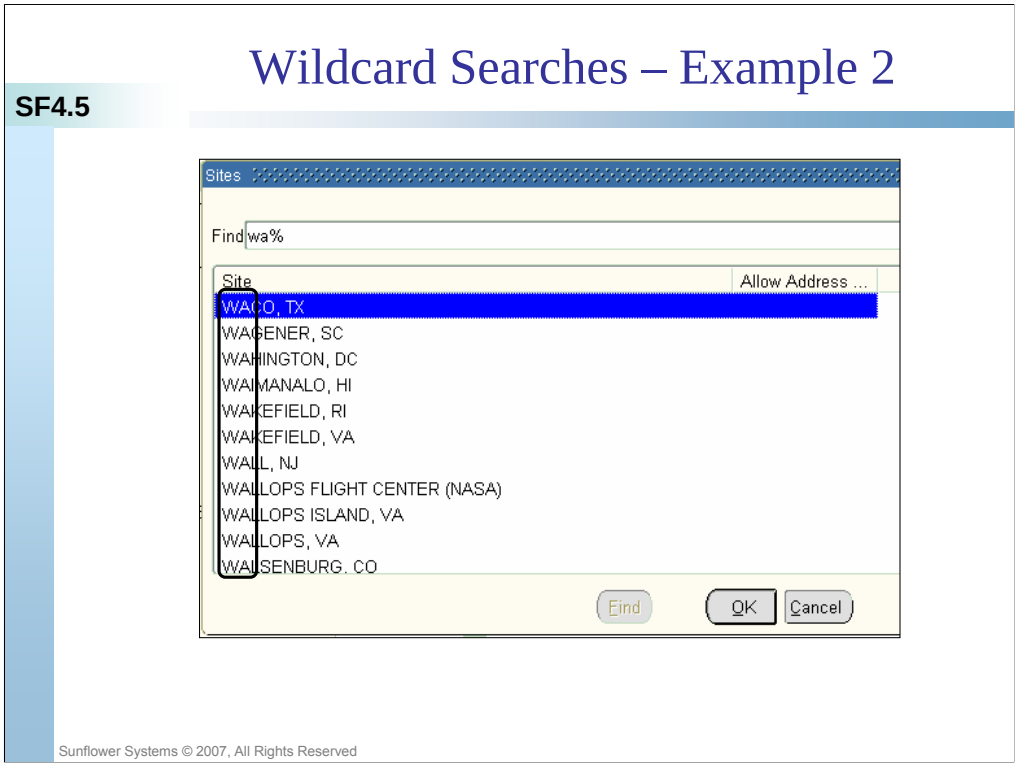
Sometimes you may not see a ‘pop-up’ error message as shown on the previous page. Depending on which screen you are working in, the **Message** field at the bottom of the screen could show an error instead. In the above example, the message states “You are not a cust area contact for 540J0N110” which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



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

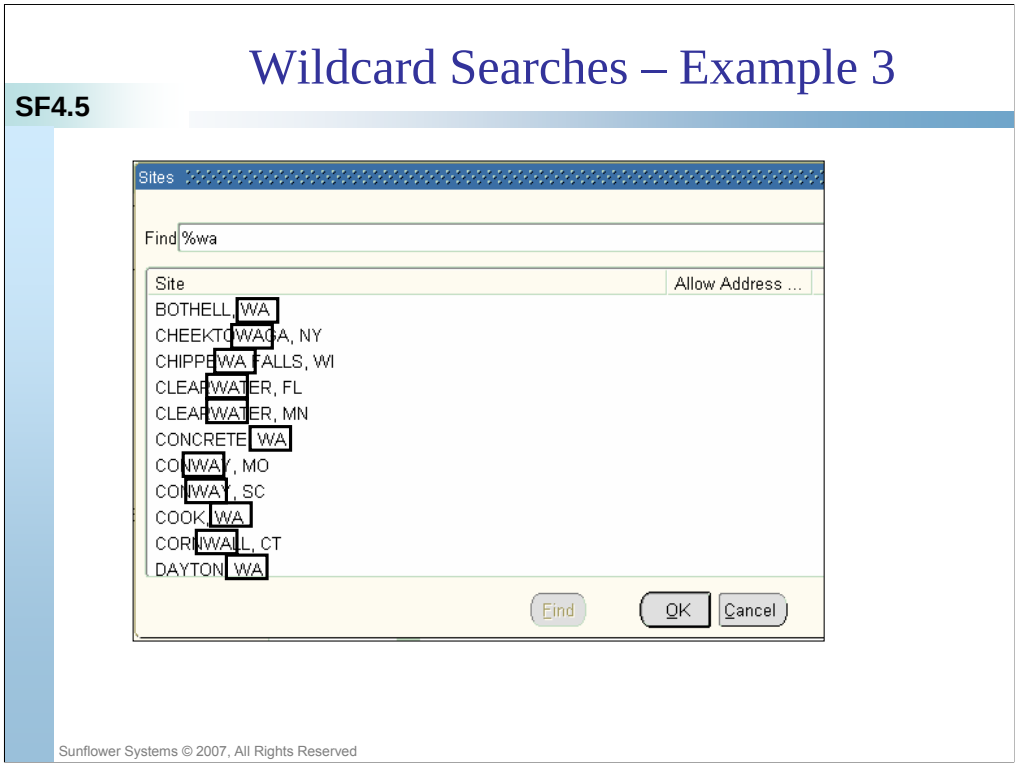
- % - returns the complete list of values (shown above)
- character + % - returns all values that begin with the character(s)
- % + character - returns all values that contain the characters anywhere within the value.

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



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

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

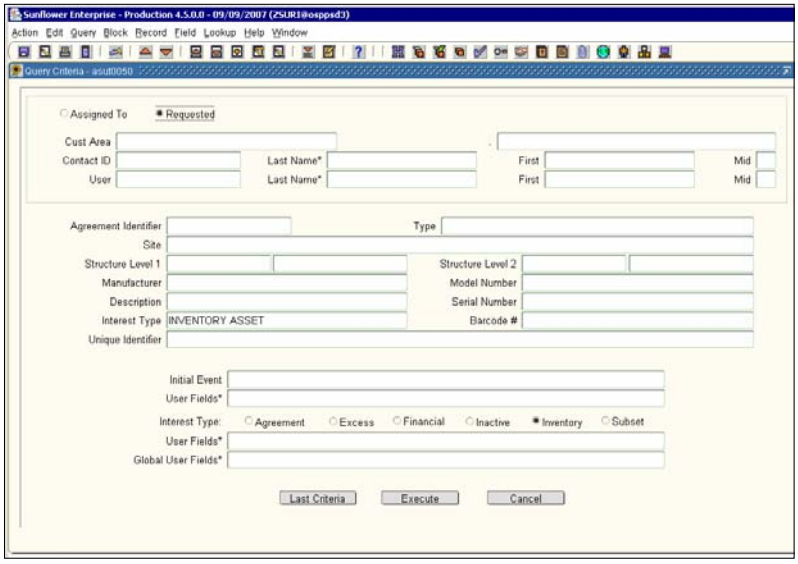


Example - % + character - return all values that contain the characters anywhere within the value.

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

SF4.5

Wildcards and Running Queries



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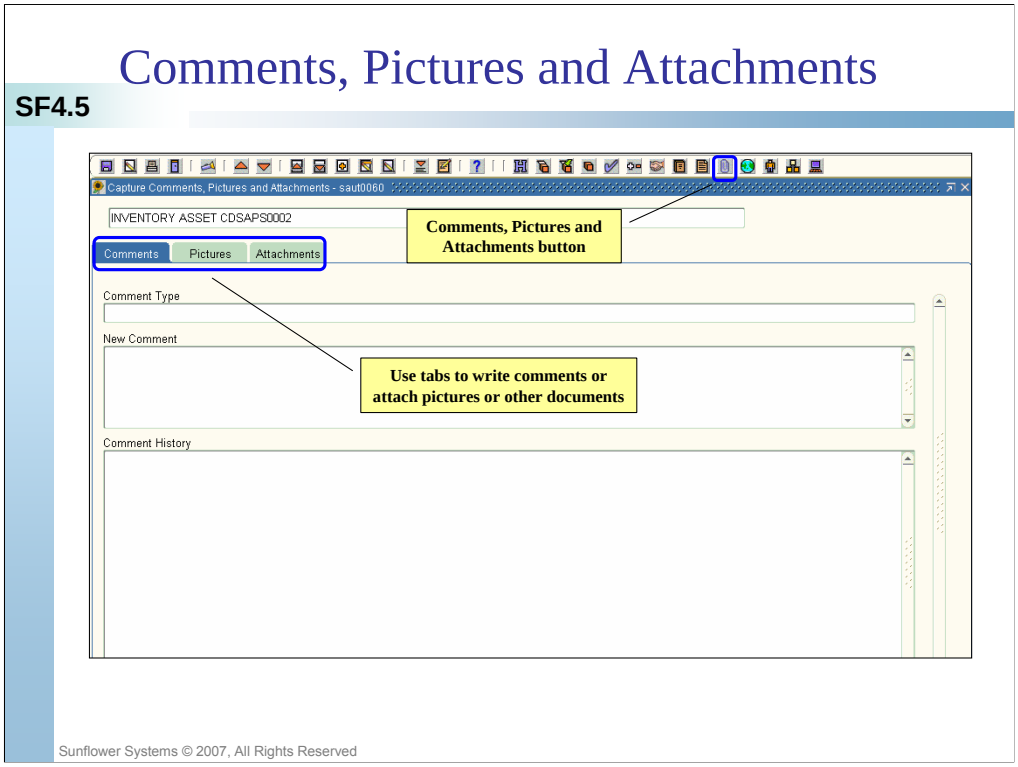
Wildcards are also useful when running queries. If you do not know the complete value of a field, but know what it begins with you may enter the beginning characters followed by the **%**. For example, in the Cust Area field a PC could enter 55% and Execute the query to return results within Custodial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



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

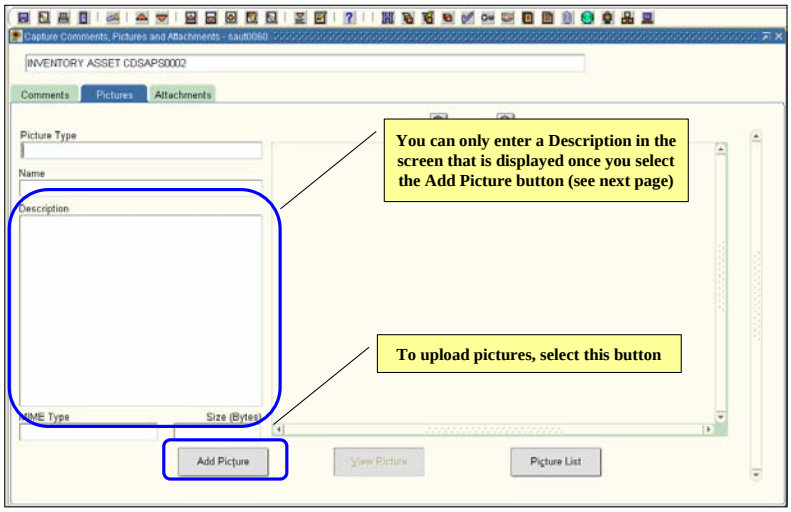
Use the **Tabs** within the form to write comments or attach pictures or other documents. Use the **Save** button when complete.

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

See the following pages to learn more about uploading pictures.

Uploading Pictures

SF4.5



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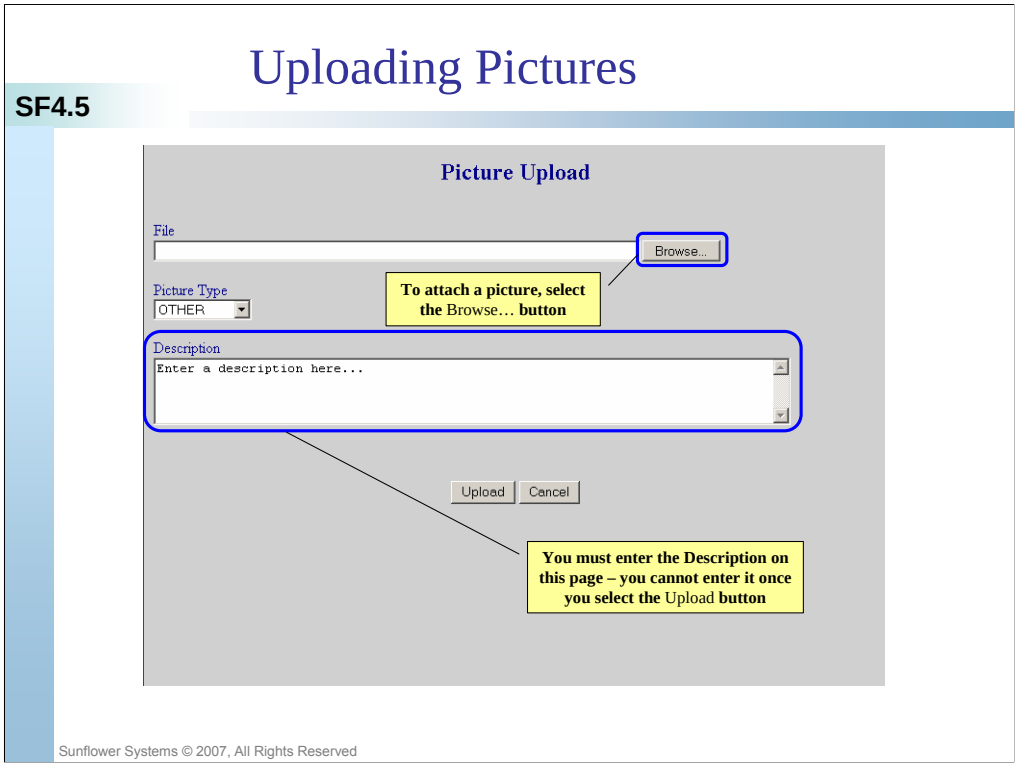
To attach a picture of a Catalog item, select the **Add Picture** button. See the next page for more information.

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



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

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

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

Save the record when complete.

Lesson Summary

SF4.5

You should now be able to:

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

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SF4.5

Chapter 3:
Acquisition and Asset Creation

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Lesson Objectives

SF4.5

After this lesson you should be able to:

- Recognize the types of asset creation a PC can do
- Summarize the steps used to add an asset
- Add an asset
- Add assets using the ‘duplicate’ feature
- Search for assets using Serial Number
- Query assets for common cost

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Asset Creation Initial Events

SF4.5

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

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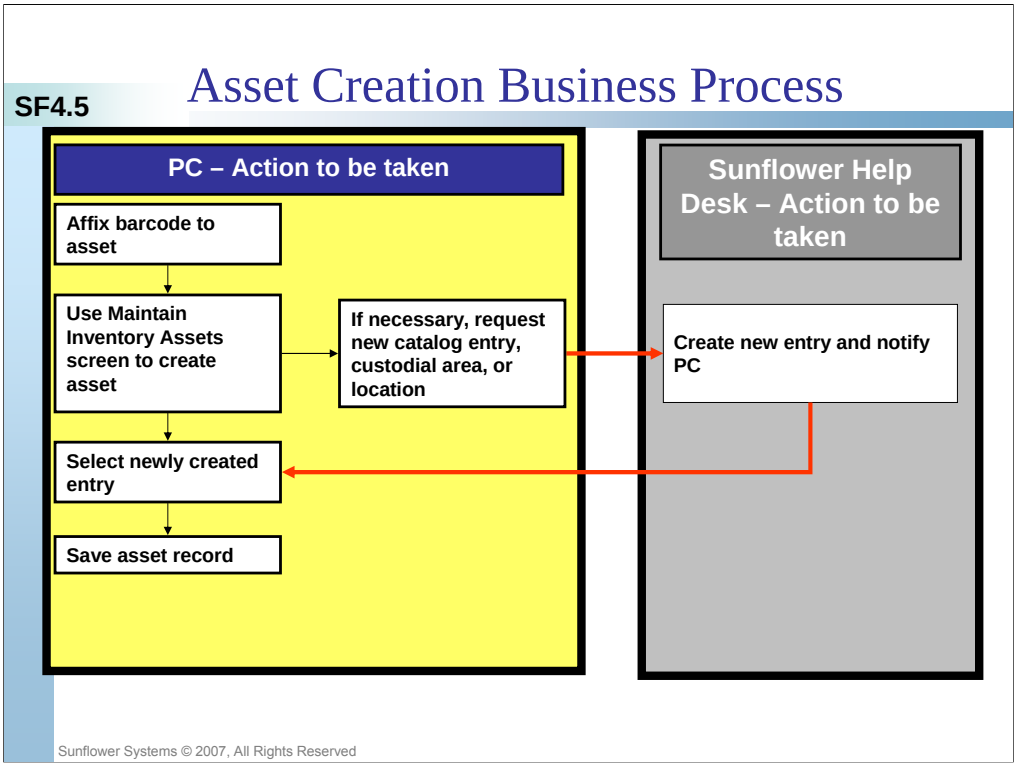
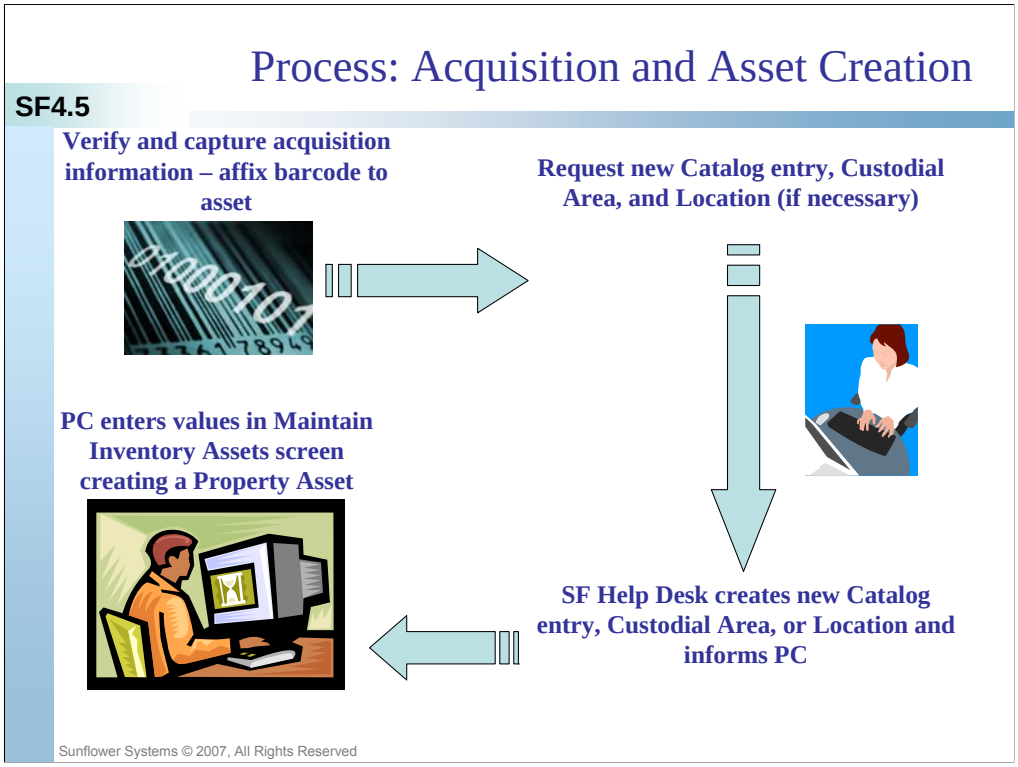
The Initial Events describe the circumstances of how the property item was acquired by DOC.



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

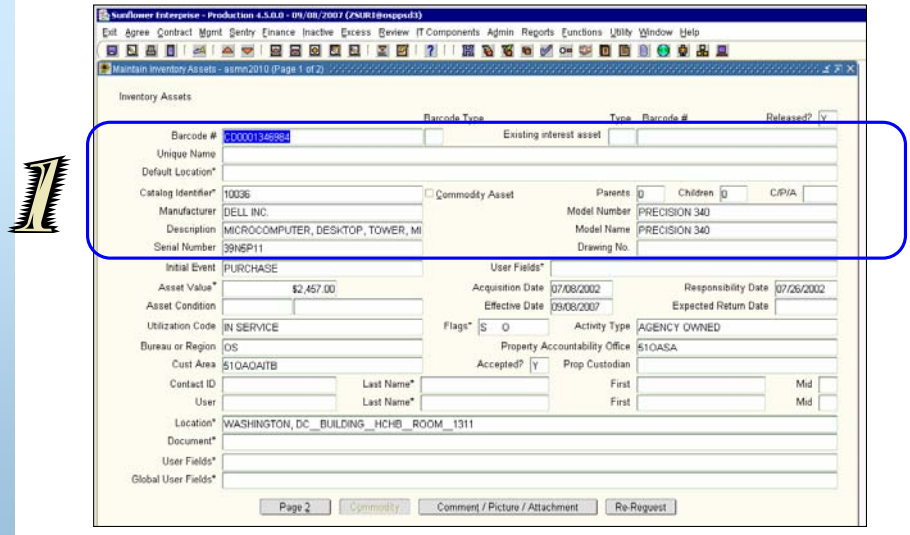
Creating an asset in Sunflower involves documenting all the asset's details: barcode number, manufacturer, model number, serial number, initial event, asset value, bureau or region, custodial area, and location.



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

Maintain Inventory Assets (1)

SF4.5



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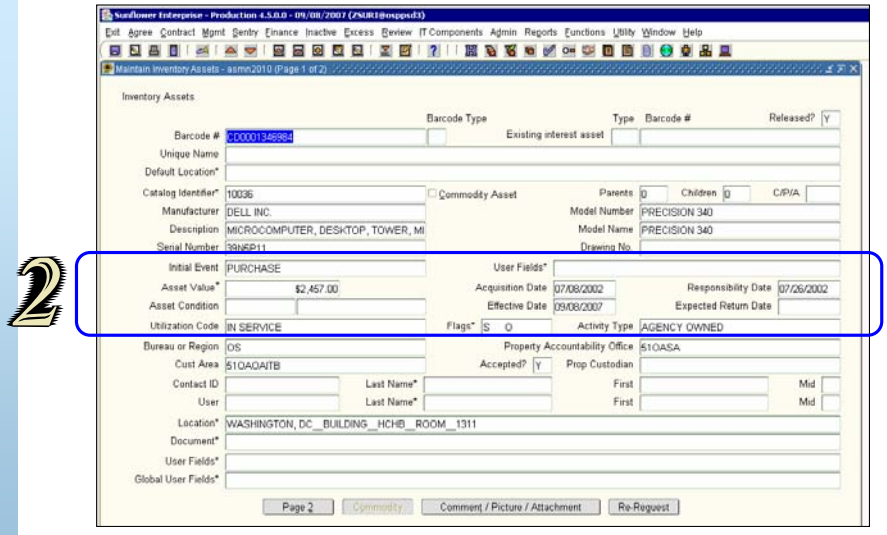
The **Maintain Inventory Assets** screen is used to create assets in Sunflower. This is a very **Tab** sensitive screen, so as much as you can, tab through the screen to enter your information.

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

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

Maintain Inventory Assets (2)

SF4.5



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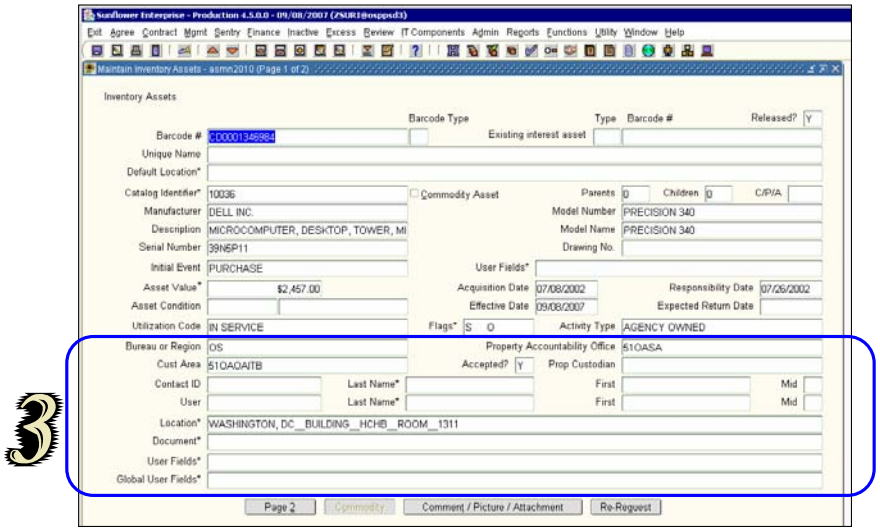
Area 2 Identify how and when the property item was acquired, as well as the cost and condition of the property item.

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

Maintain Inventory Assets (3)

SF4.5



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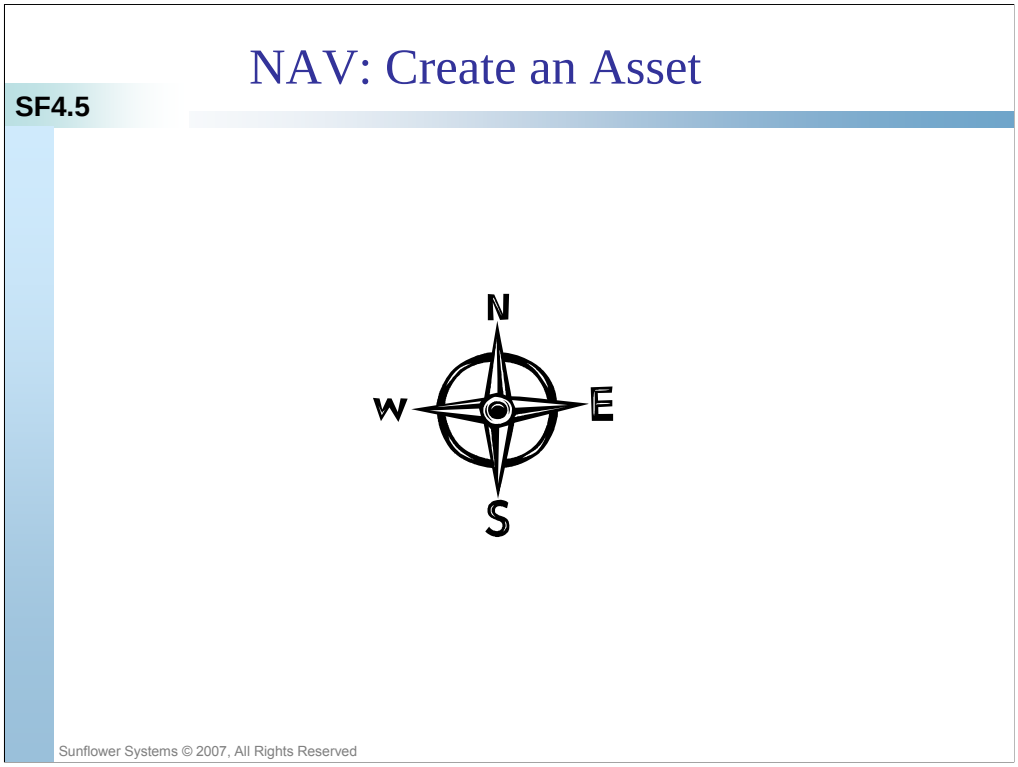
Area 3 Identify the Bureau or Region, PAO, Custodial Area (PC will populate automatically based on Custodial Area selected) responsible for the property, as well as the user and the location of the property item in this area.

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

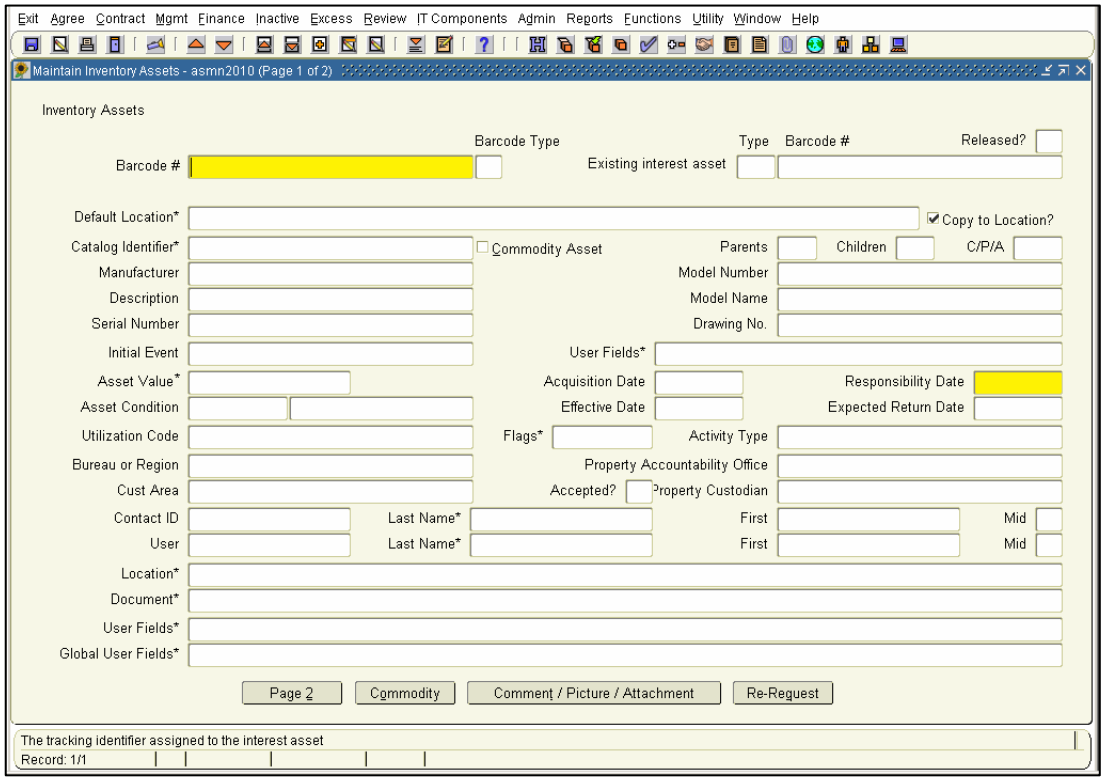
The **User** field is not currently required, but may be in the future.



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

Asset Creation

Inventory Clerk
M > Mgmt > Maintain Inventory Assets
Maintain Inventory Assets



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

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

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

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

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

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

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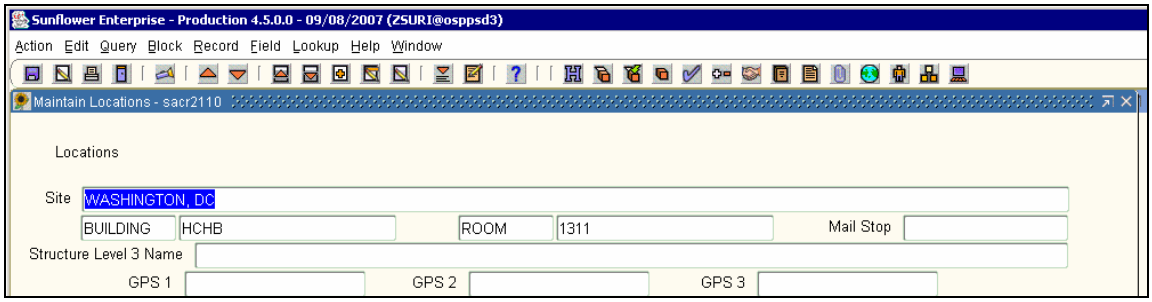
	First name from the LOV. This will automatically populate the User's badge number in the **User** field.
Location	Select the **Location** of the asset by double clicking into the field.
– **Site**	Enter or select using the LOV.
– **Building**	Enter or select using the LOV.
– **Room**	Enter or select using the LOV.

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

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



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

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

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

8. Optionally, select the **Page 2** button at the bottom of the screen to view the catalog information associated with the manufacturer and model number for the asset.

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

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

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

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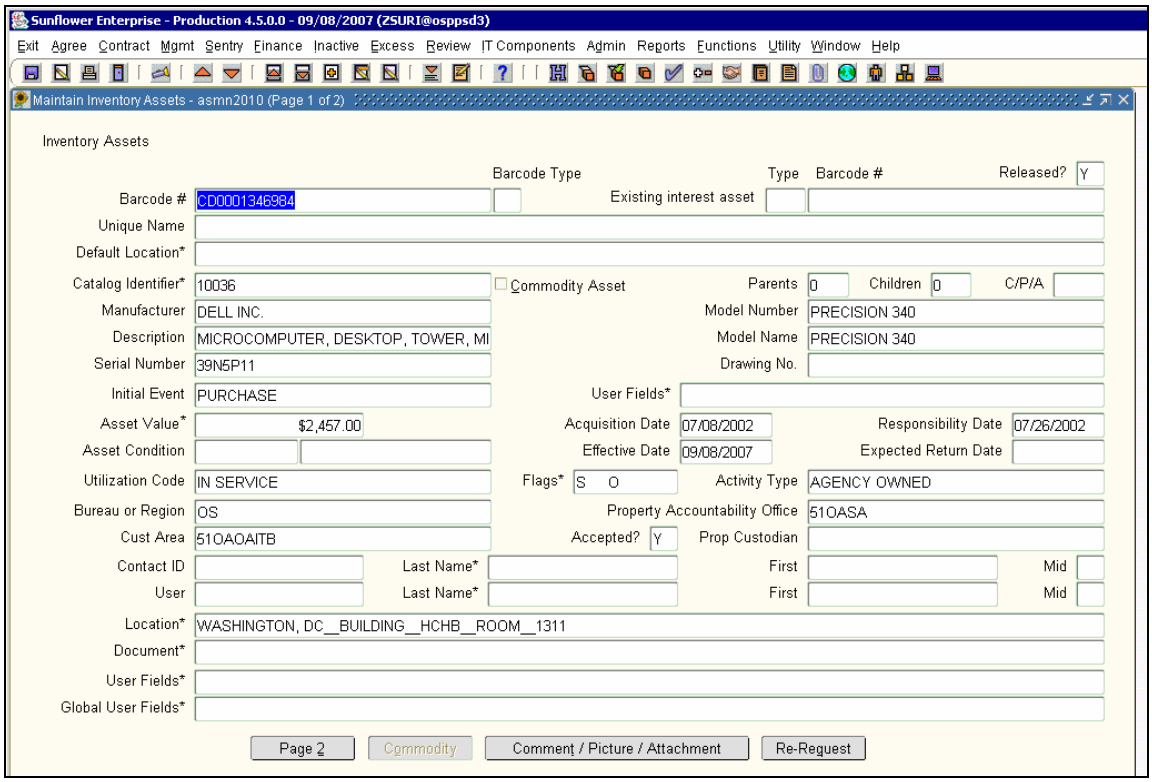

End of activity.

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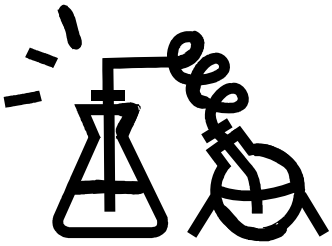
LAB: Create an Asset

SF4.5



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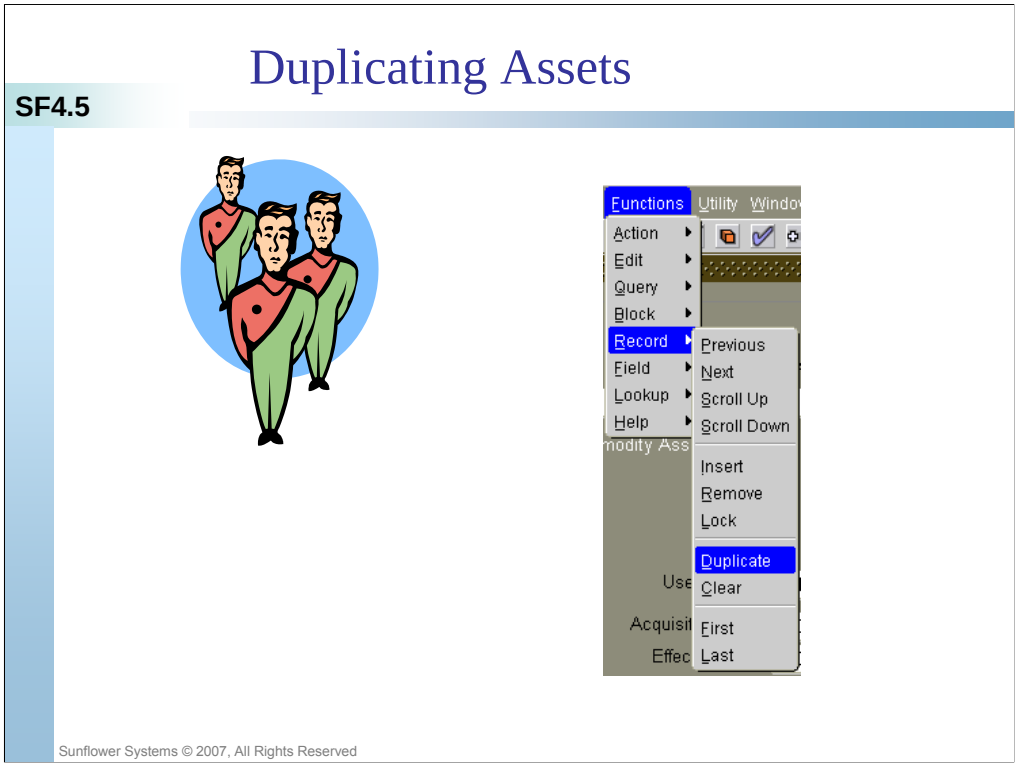
Create the following asset in Sunflower:

- Dell Laptop: Inspiron 1150
- Model Number: PP08L
- Serial Number: unavailable
- Barcode Number = CD01MMDDYYXX (where MM/DD/YY=Month, Day, Year, and XX=Your student number)
- Assign the asset to ITA as the Bureau (55) and your assigned Custodial Area for class
- For Location, select your office location.
- The Dell laptop was purchased September 5, 2007 and cost $1399.00

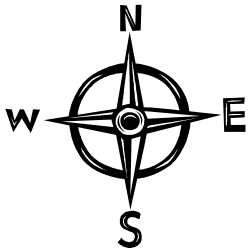
Barcode #:_____



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

NAV: Add Assets Using Duplication

SF4.5



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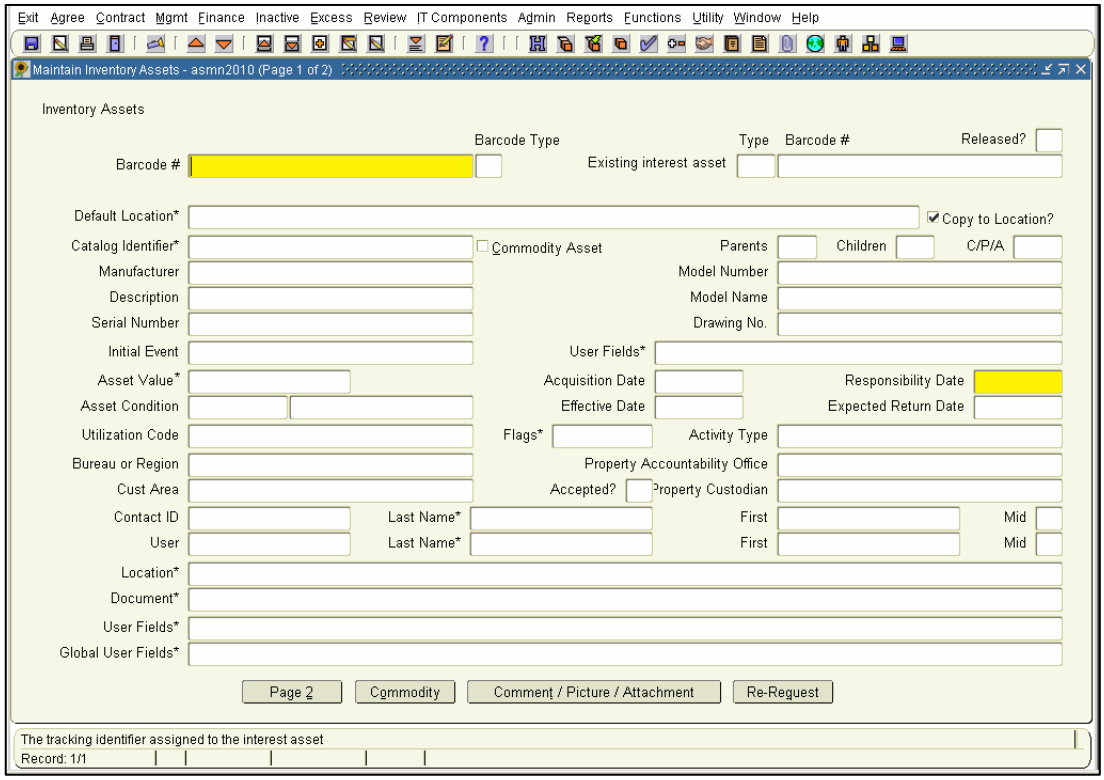
Manually Add Assets Using Duplication

Purpose

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

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



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

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

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

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

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

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

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

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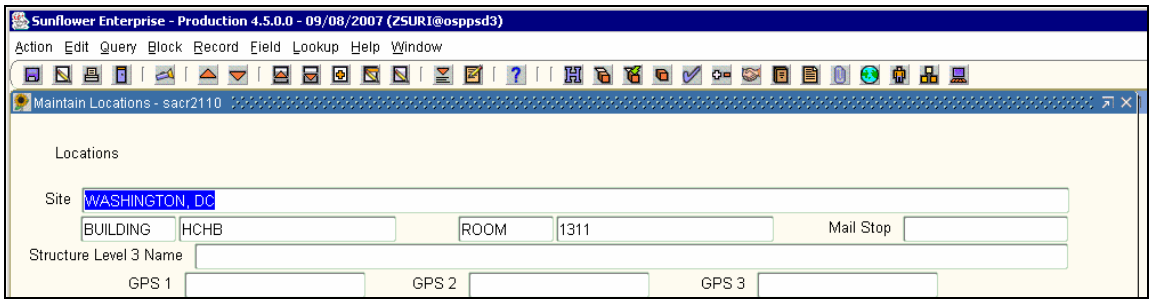
Contact ID	Identifies the secondary Property Custodian for the asset. Select the **Last Name** from the list of values and then select a **First** name from the LOV. This will automatically populate the Secondary Custodian's ID in the **Contact ID**.
User	Select the **Last Name** from the list of values,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

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

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



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

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

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

8. Optionally, select the **Page 2** button at the bottom of the screen to view the catalog information associated with the manufacturer and model number for the asset.

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

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

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

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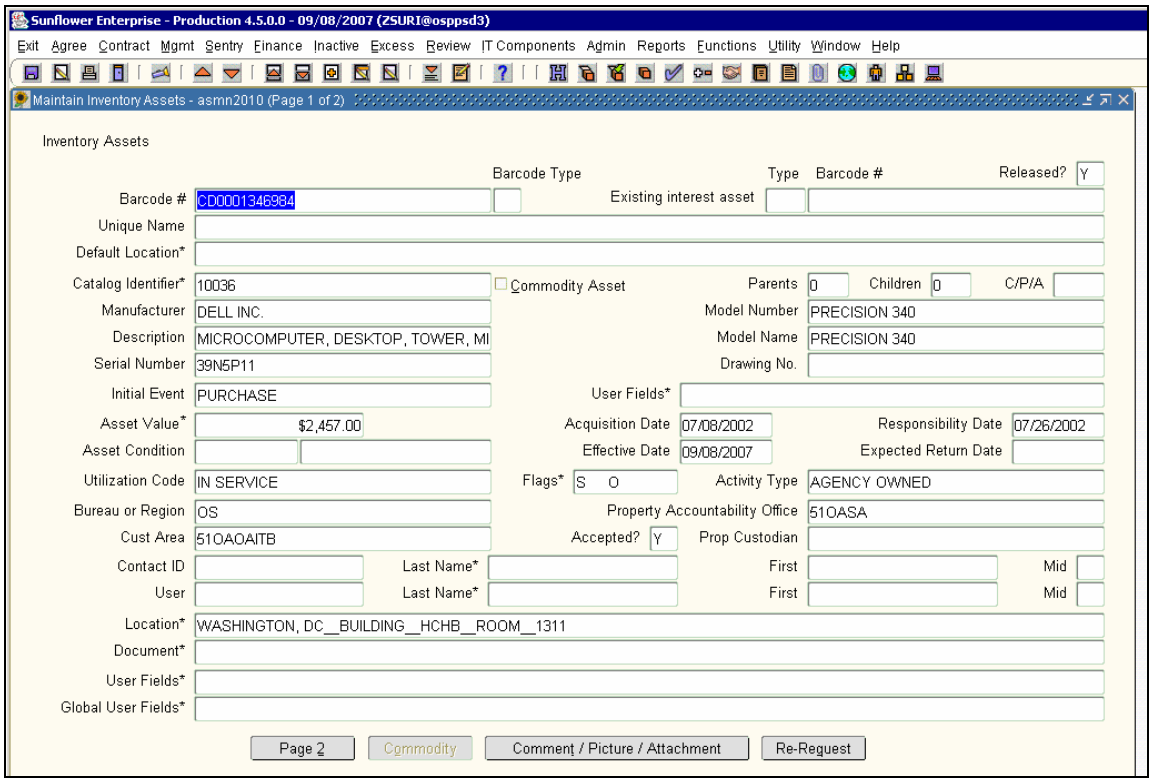

10. Select the **Save** button from the toolbar to save the **Inventory Asset** record.

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

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

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

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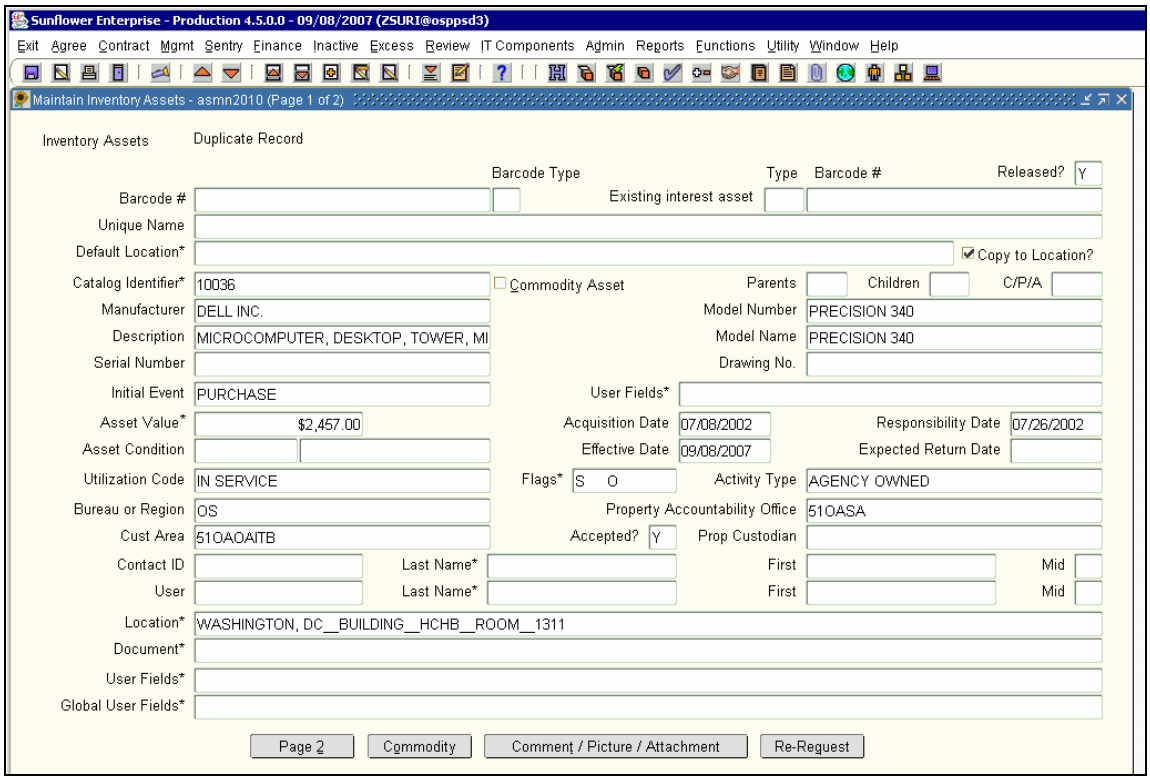

12. Enter a new **Barcode Number.**

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

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

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

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

<u>Example:</u> Below is a duplicate asset record. Note the new **Barcode Number**:

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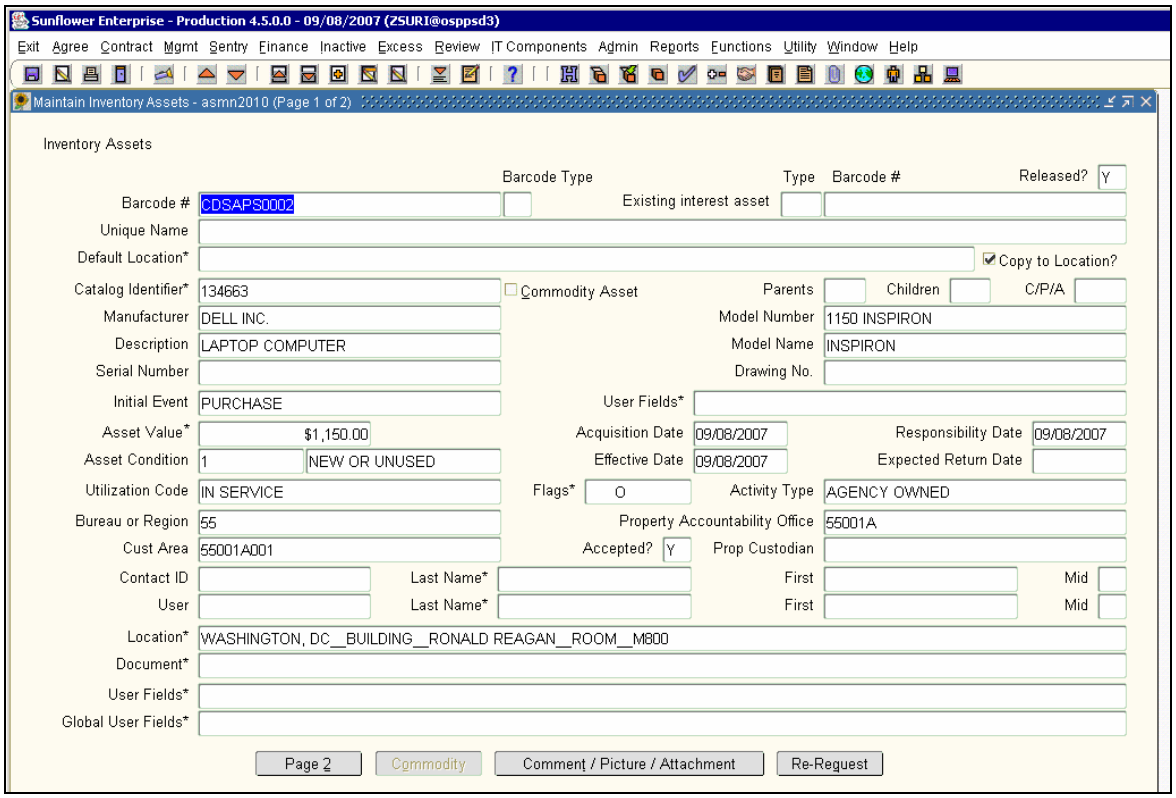

End of activity.

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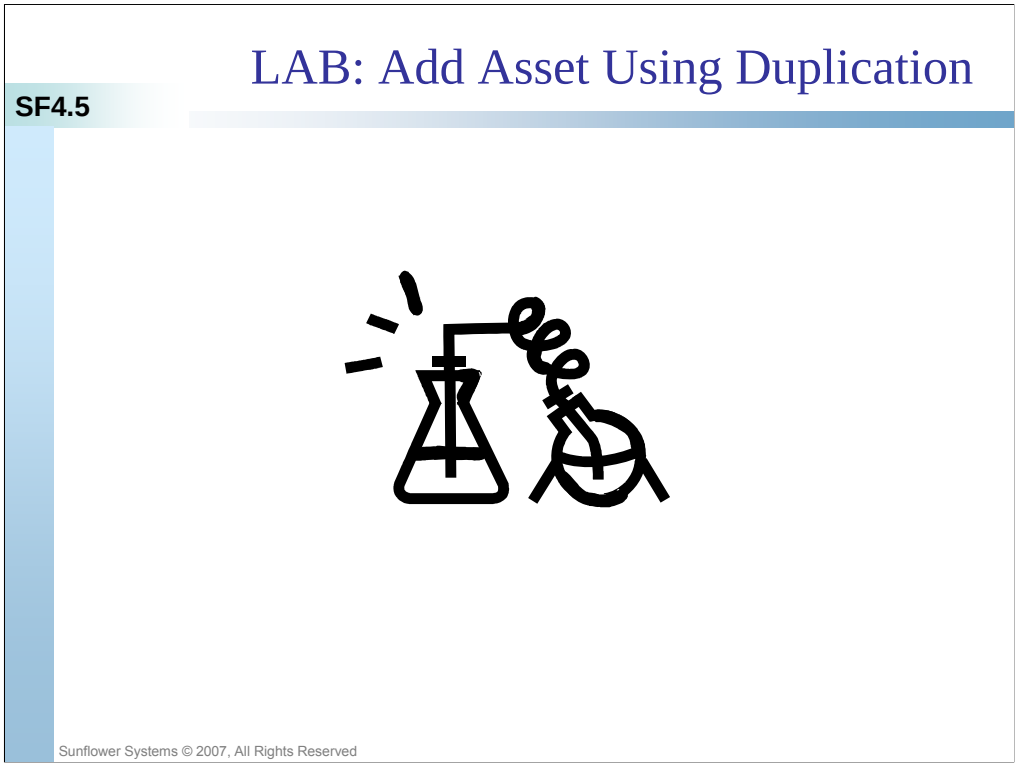
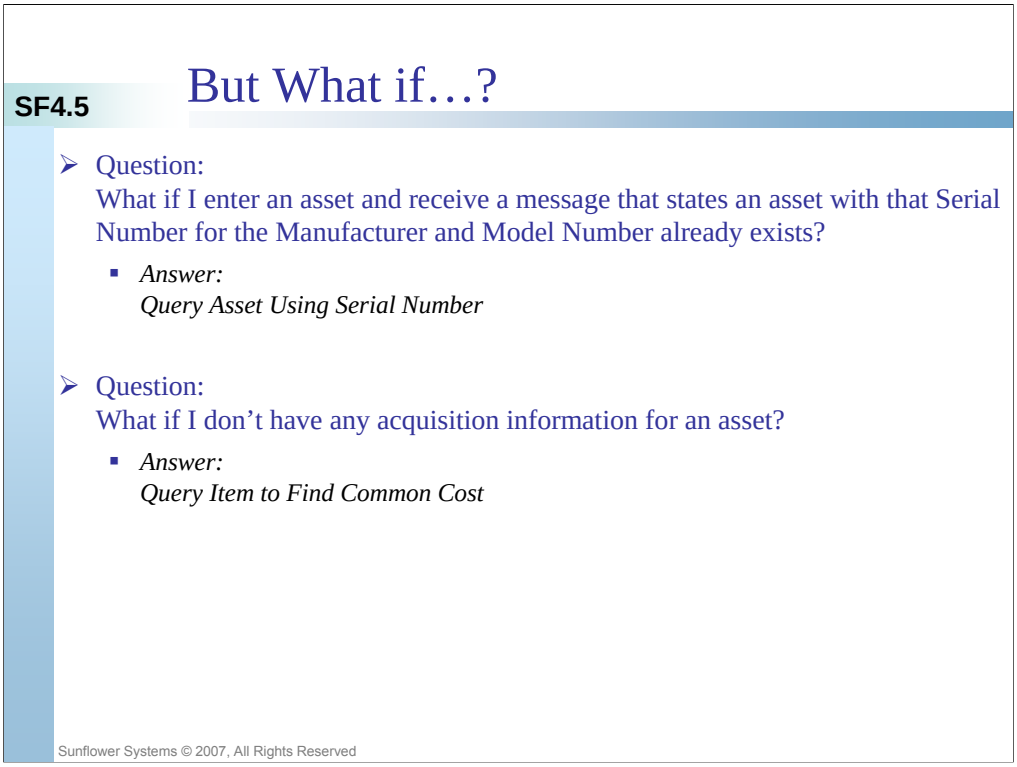


Create the following asset in Sunflower:

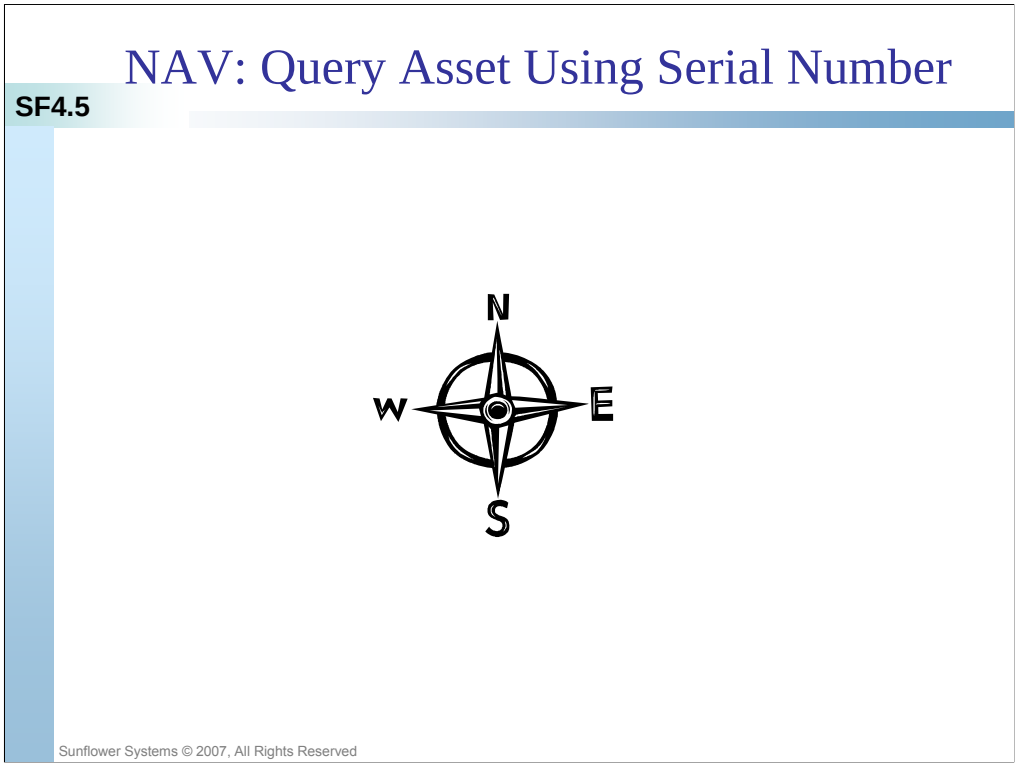
- Duplicate the laptop from the Create an Asset Lab
- Dell Laptop: Inspiron 1150, Model Number: PP08L, Serial Number - Unavailable
- Barcode Number = CD02MMDDYYXX (MM/DD/YYYY=Month, Day, Year, and XX=Your student number)
- Assign the asset to ITA as the Bureau (55) and your assigned Custodial Area for class
- For Location, select your office location.
- The Dell laptop was purchased September 5, 2007 and cost $1399.00

Barcode #:_____



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

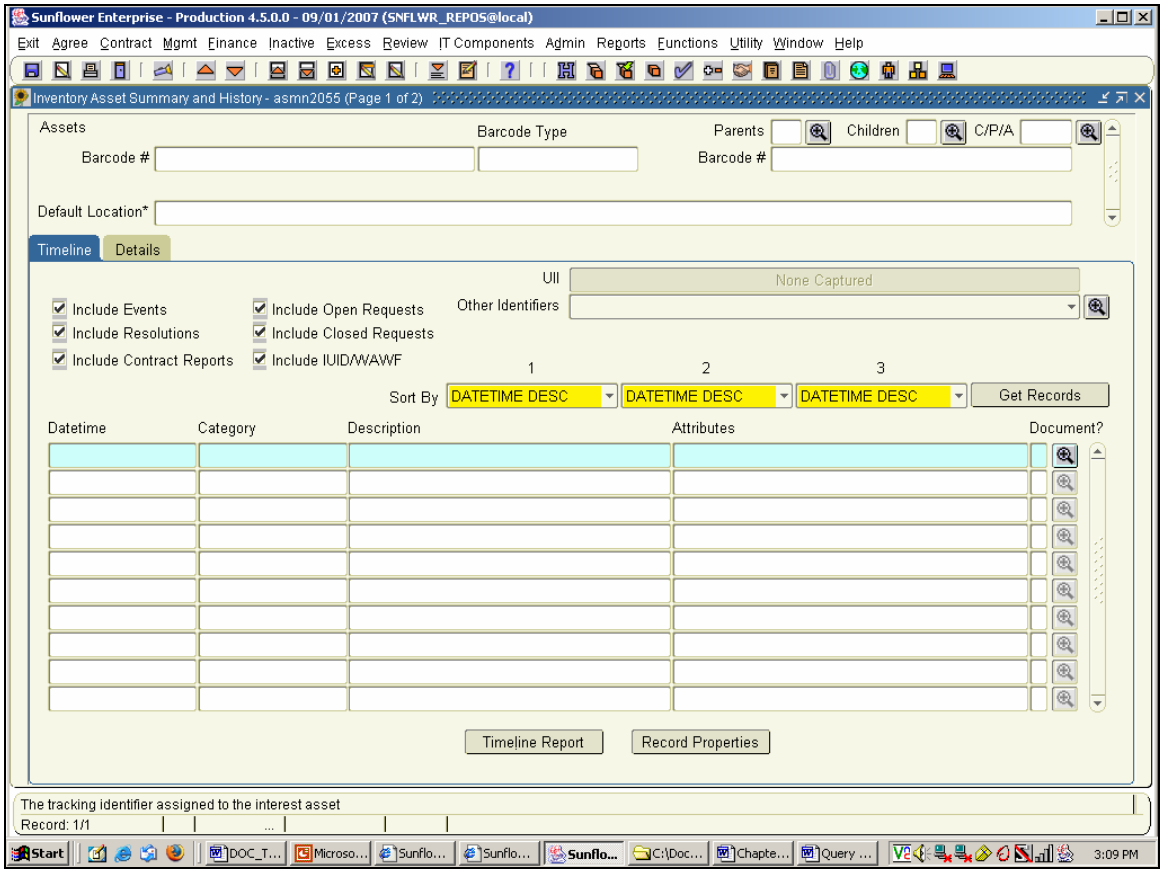
Query Item to Find Common Cost is an option to help determine an asset's value. For example, during the Review Campaign, the PC may find assets that have not been entered into Sunflower. The PC should then barcode these *Found During Inventory* assets and add them to Sunflower. If the acquisition documentation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



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

Query Asset Using Serial Number

Inventory Clerk/ Inventory Manager
M > Mgmt > Inventory Asset Summary and History
Inventory Asset Summary and History



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

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

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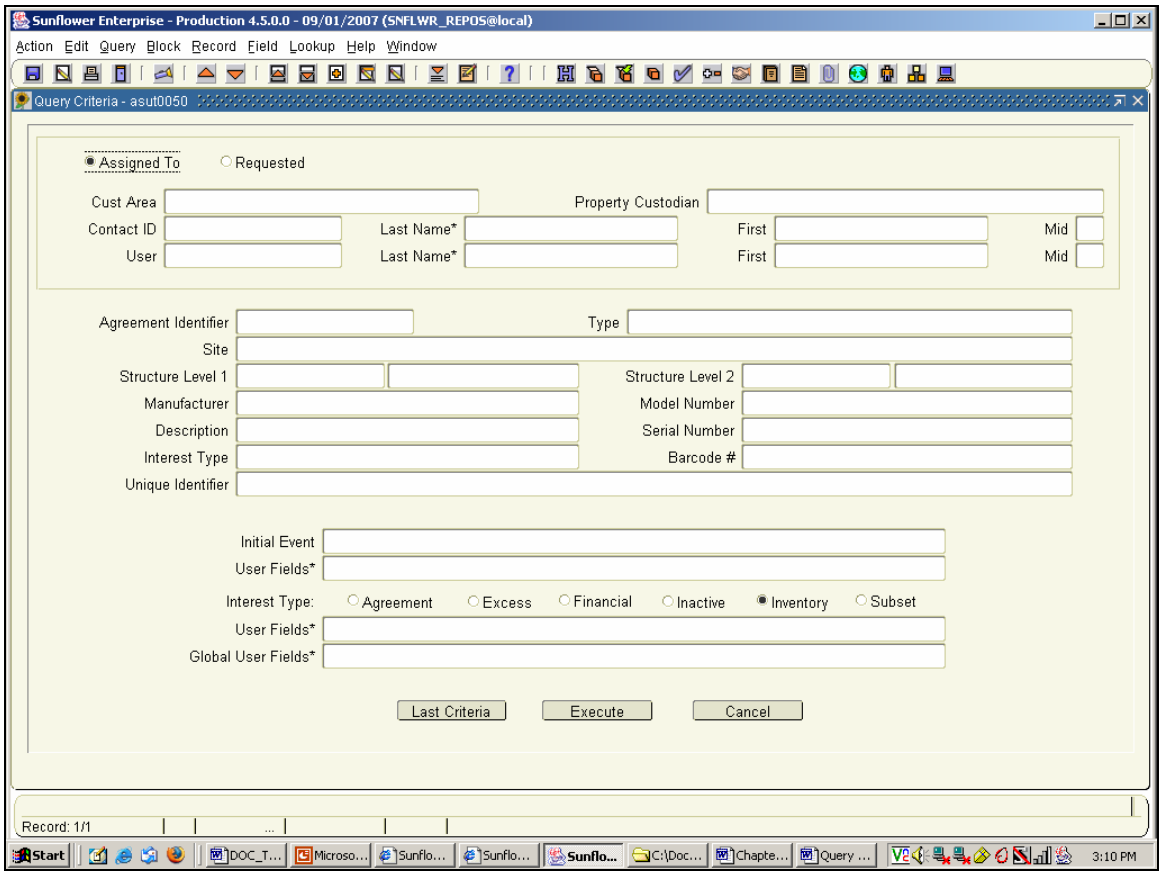
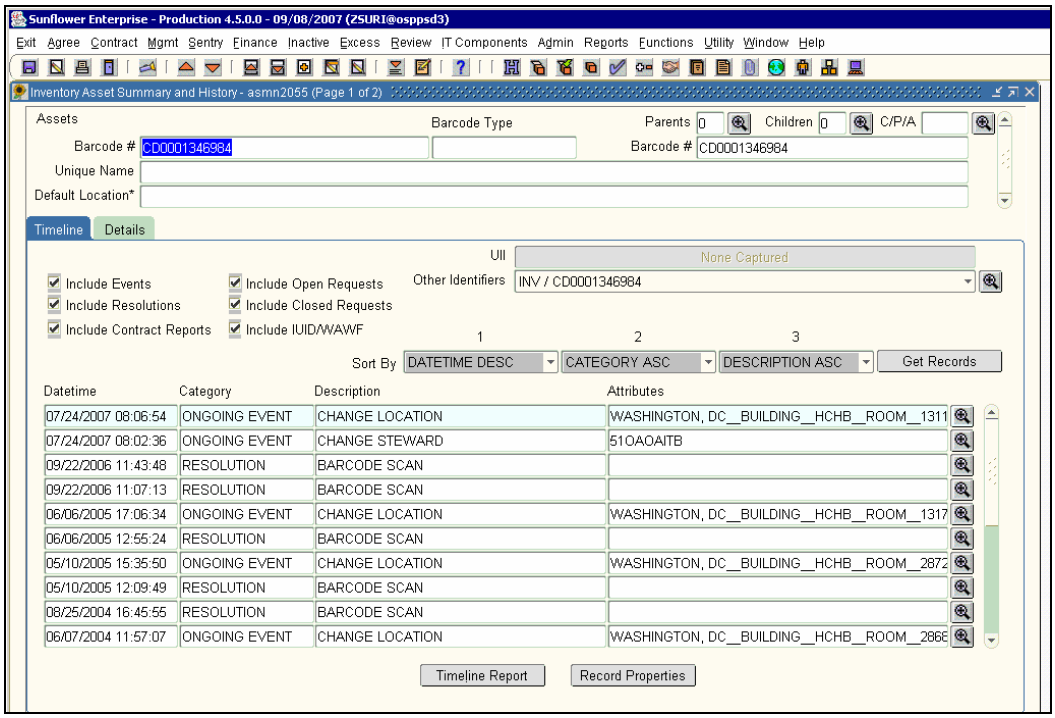


2. Enter the serial number of the asset in the **Serial Number** field.

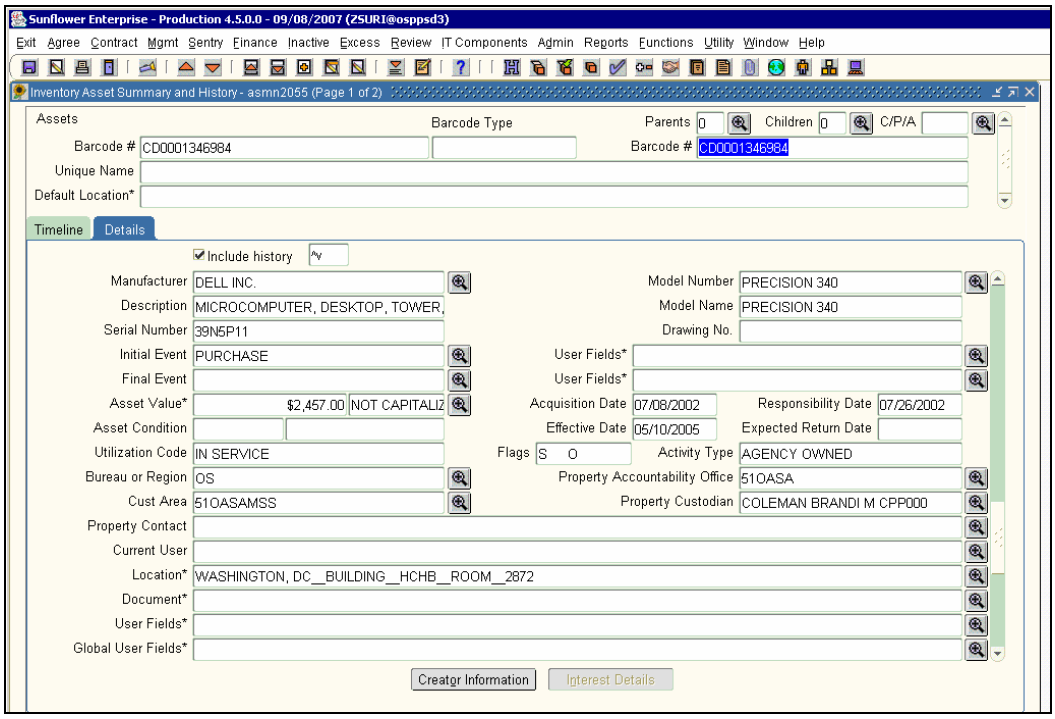
3. Select the **Find** button from the toolbar once more.

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



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

<u>Result:</u> The Details of the property record history is displayed.



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

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

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Result: The timeline will display.

7. Continue scrolling through records as needed.

End of activity.

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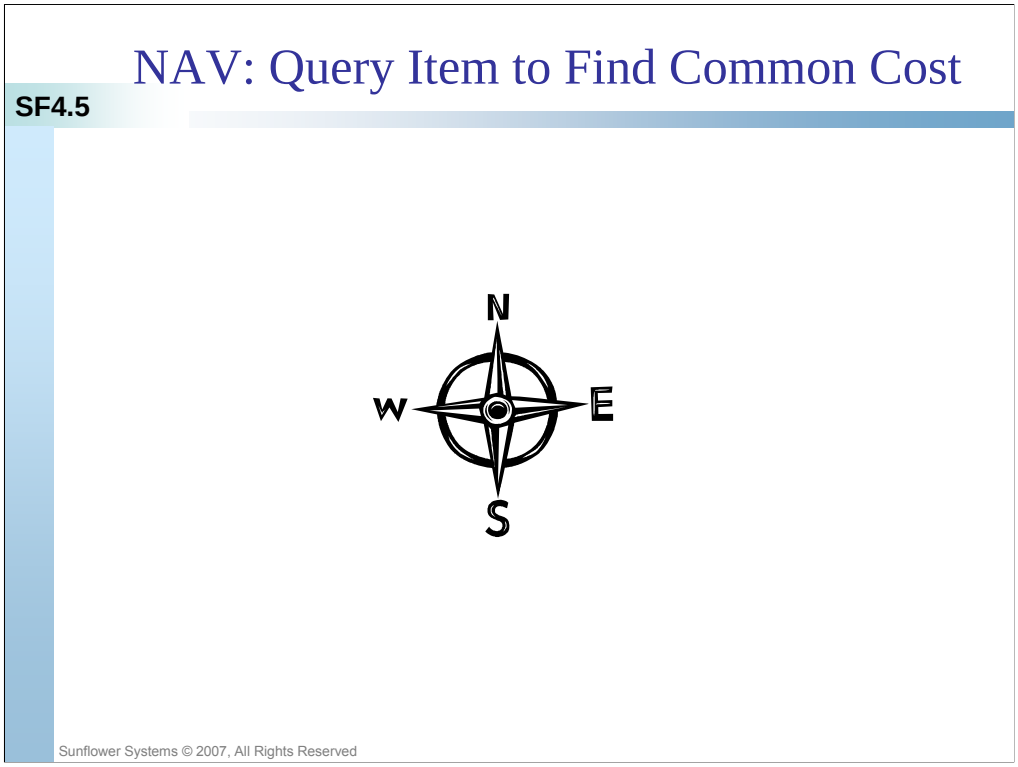
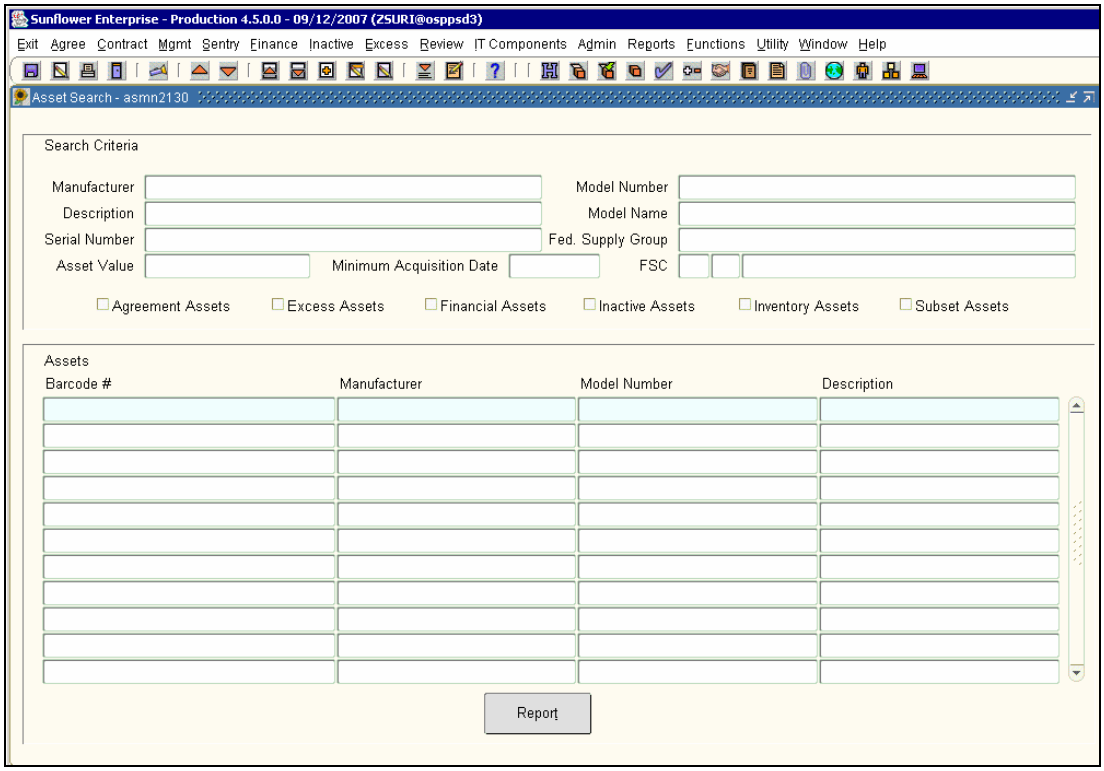


During the Review Campaign, the PC may find assets that have not been entered into Sunflower. The PC should then barcode these *Found During Inventory* assets and add them to Sunflower. If the acquisition documentation is not available, the PC may use the steps in this NAV *"Query Item to Find Common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

Query Item to Find Common Cost

Inventory Clerk/ Inventory Manager
M > Mgmt > Asset Search
Asset Search



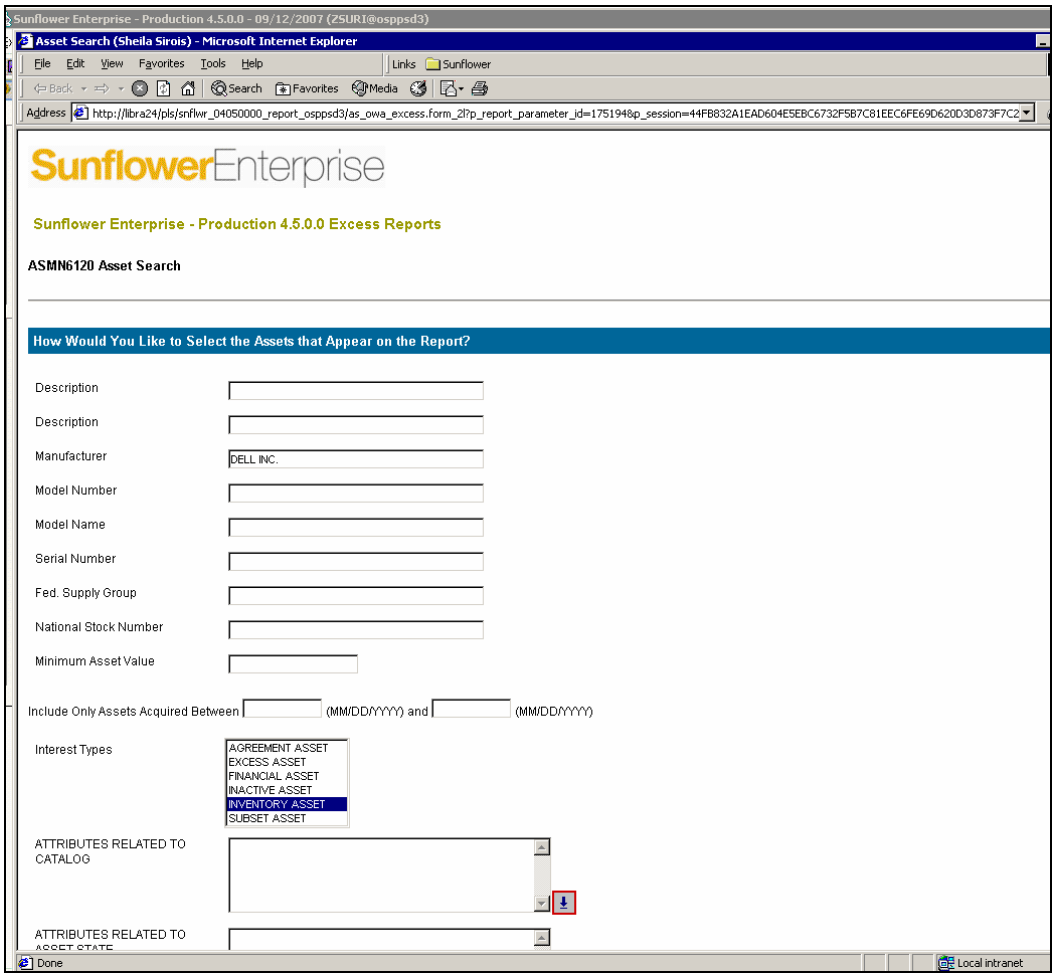
1. Enter at least one field on which to query assets. Use the **LOV** button to look up valid values.

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

2. Select the **Inventory Assets** checkbox to search all assets currently in DOC inventory.

3. Select the **Report** button at the bottom to view the assets in a report format with property record details, including costs.

Result: The Asset Search report fields displays.



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

<u>Result:</u> The review query screen displays.

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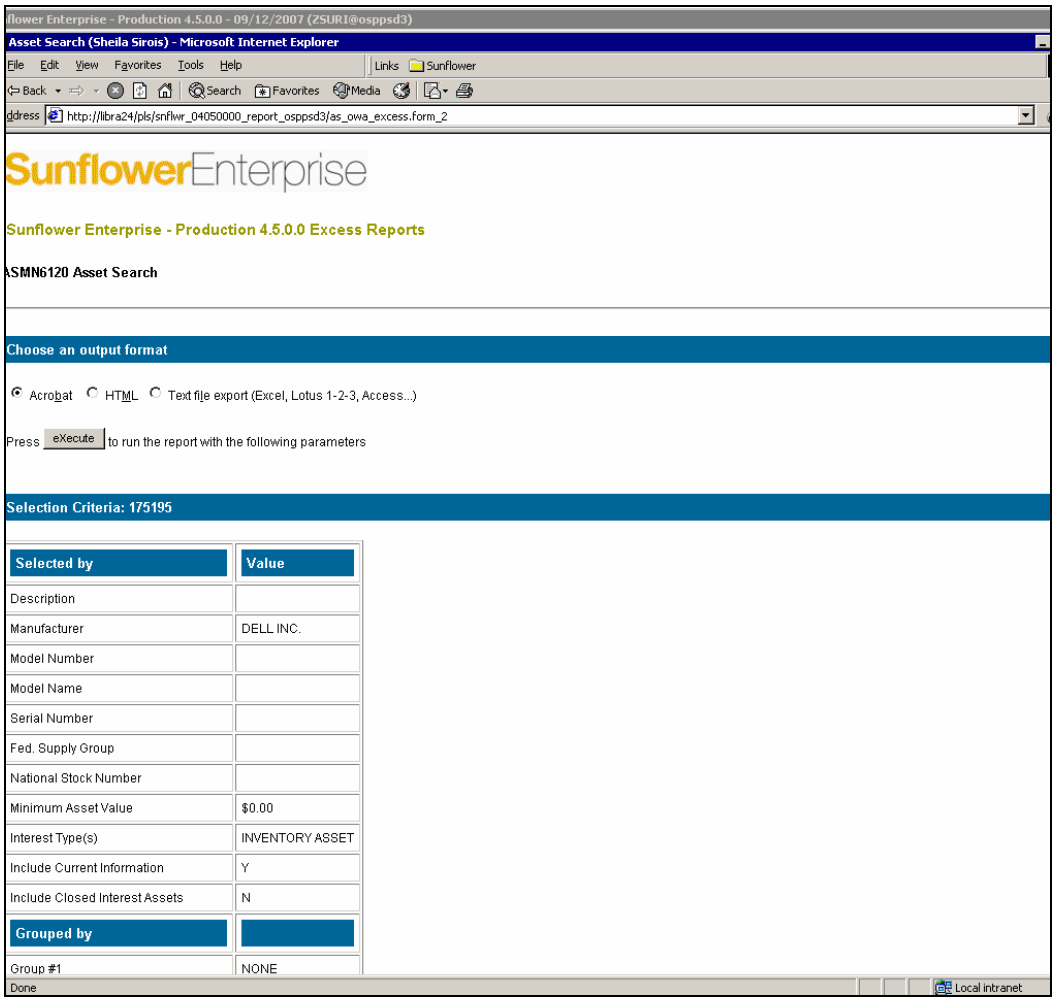

5. Select the **Acrobat** radio button.

6. Select the **eXecute** button to run the report.

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

se **Asset Search** Page 7966 of 7967
09/12/2007 20:38

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

Total : 36540 $ 97,151,340.65

Report Total : 36540 $ 97,151,340.65

End of activity.

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Lesson Summary

SF4.5

You should now be able to:

- Recognize the types of asset creation a PC can do
- Summarize the steps used to add an asset
- Add an asset
- Add assets using the ‘duplicate’ feature
- Search for assets using Serial Number
- Query assets for common cost

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SF4.5

Notes:

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SF4.5

Chapter 4:
View Property Records

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Lesson Objectives

SF4.5

After this lesson you should be able to:

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

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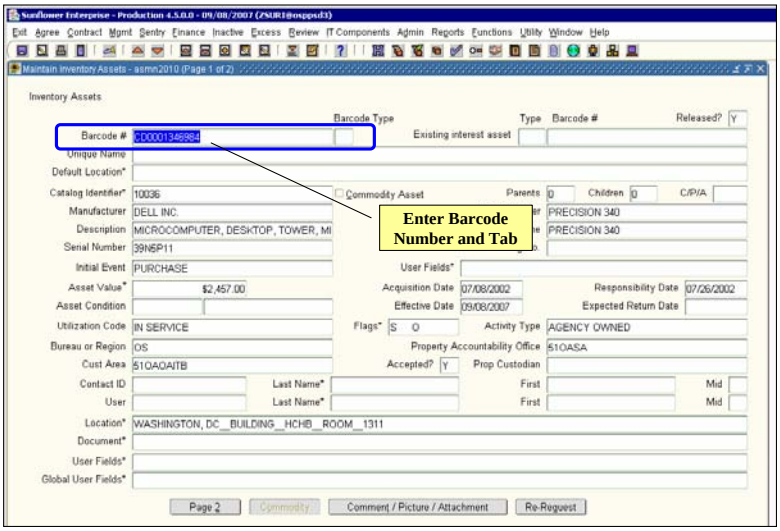
Quick Search

SF4.5



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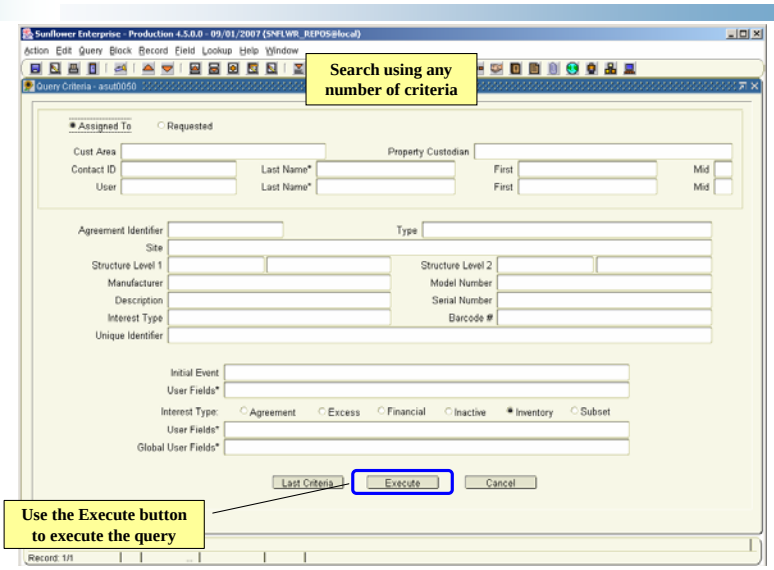
Use the **Maintain Inventory Assets** screen to get a quick glance at all of your custodial area's assets.

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

Query for Assets

SF4.5



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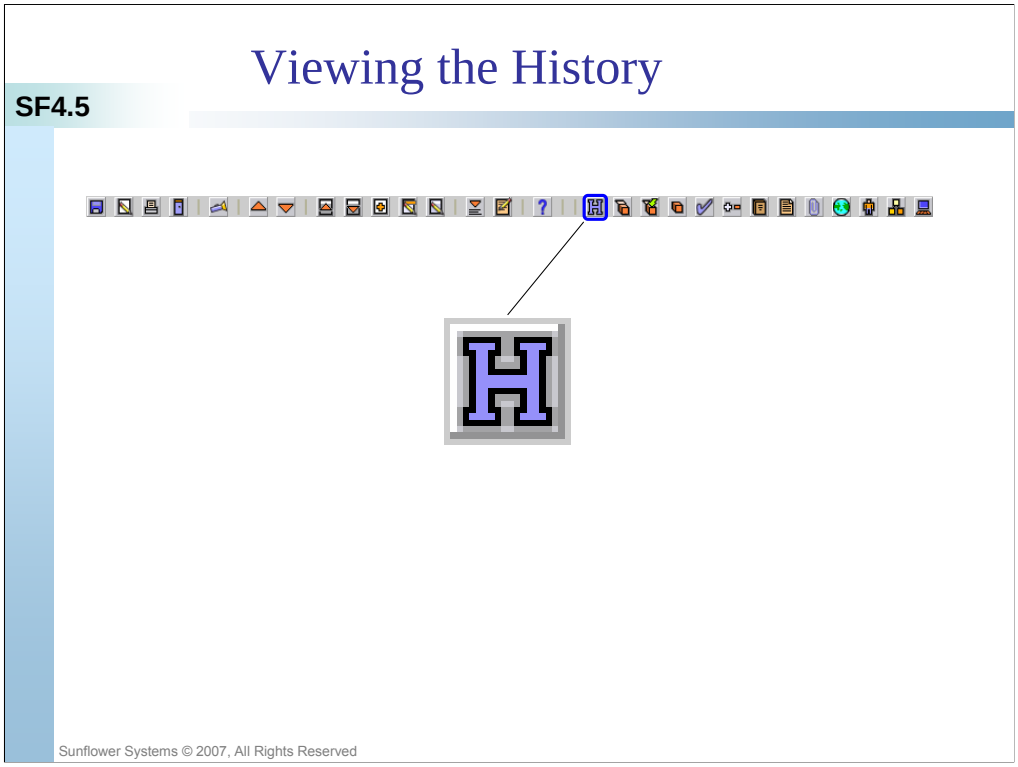
If you don't know a property record's Barcode Number, or if you want to view all of your custodial code's assets, from the **Maintain Inventory Assets** screen select the **Find** button from the toolbar.

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

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

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

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



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

•The current status of an asset

•The history of an asset

•The creator information of an asset (Name of creator, time of asset creation)

•An asset's Catalog information (Manufacturer, Model Number, Official Name, FSC, Object Class, Life Expectancy, Sensitive Flag)

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

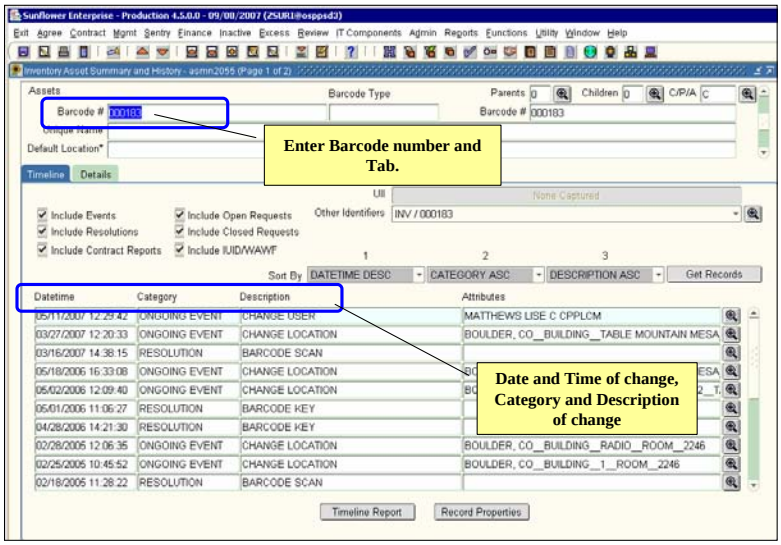
1.From any screen in the NBS Property System with a Barcode Number by selecting the **Summary & History** button from the toolbar, as shown above; or

2.Using the **Inventory Asset Summary and History** screen, discussed on the next page.

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

View the Timeline History

SF4.5



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

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

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

•Datetime – records the date and time the change/update was made

•Category – describes the type of change related to the asset lifecycle

•Description – brief description of change/update

•Attributes – the field and entry change/update

•Lookup – drill down to other associated forms identifying the change/update

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

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

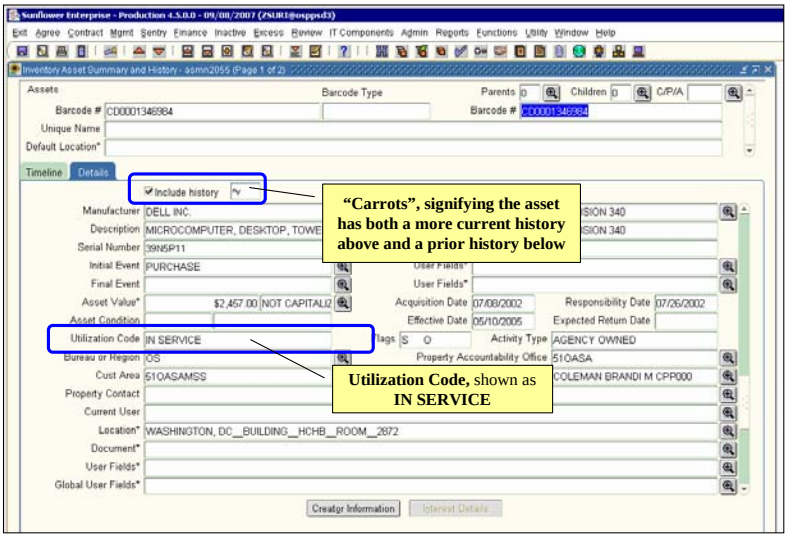
Note 1: Use the **arrow keys** on the keyboard, the **Next Record** button on the toolbar, or the **Vertical Scrollbar** to scroll and view the asset’s history.

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

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

View the Prior History

SF4.5



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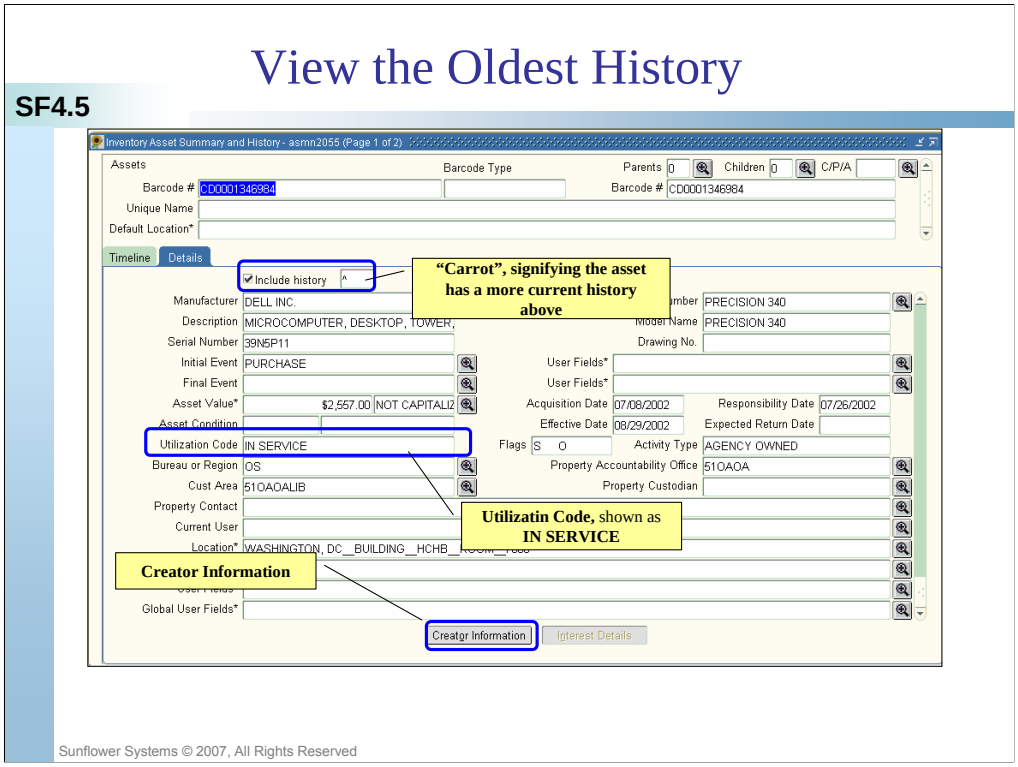
In this example, note both the upwards pointing "carrot" and the downwards pointing "carrot", which signifies the asset has both a more current history above and a prior history below.

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

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



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

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

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

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

View the Creator Information

SF4.5

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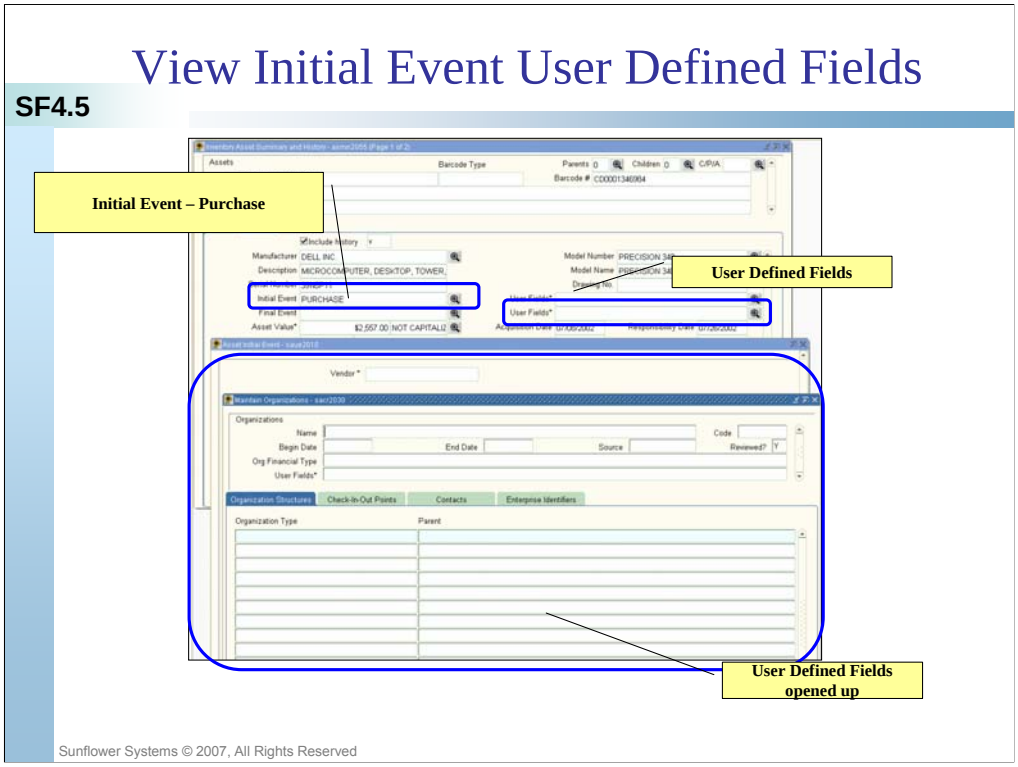
When you select the **Creator Information** button as shown on the previous page, you can view who created the record along with the date the record was created. You can also view who last updated the record.

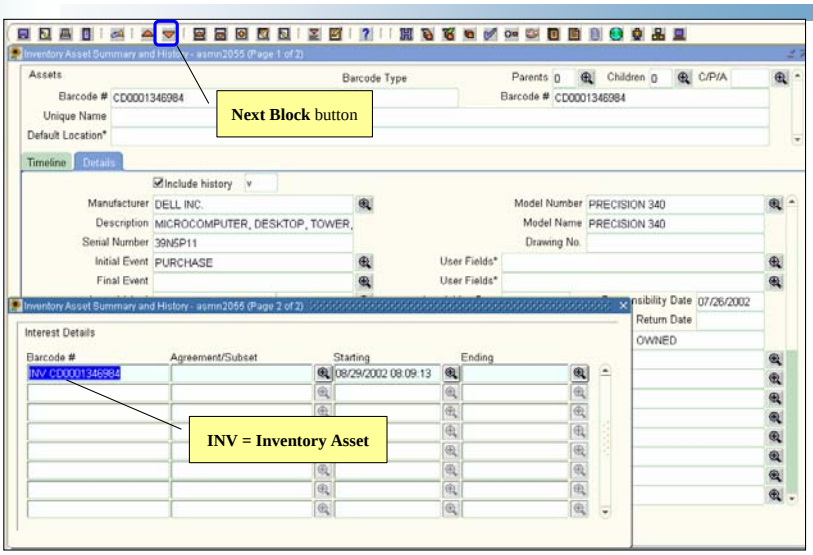


To view more information about the purchase of an item, open the **User Fields*** next to the **Initial Event.**

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

View the Details

SF4.5



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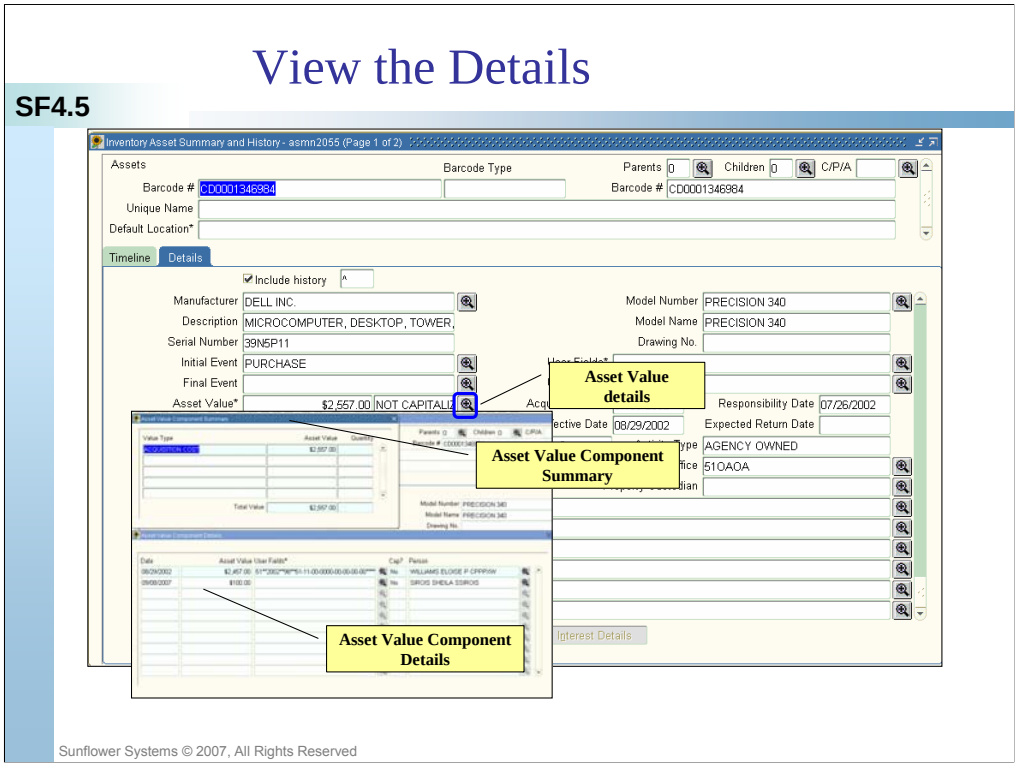
To view specific details about when the property's status changed, select the **Next Block** button from the toolbar.

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

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

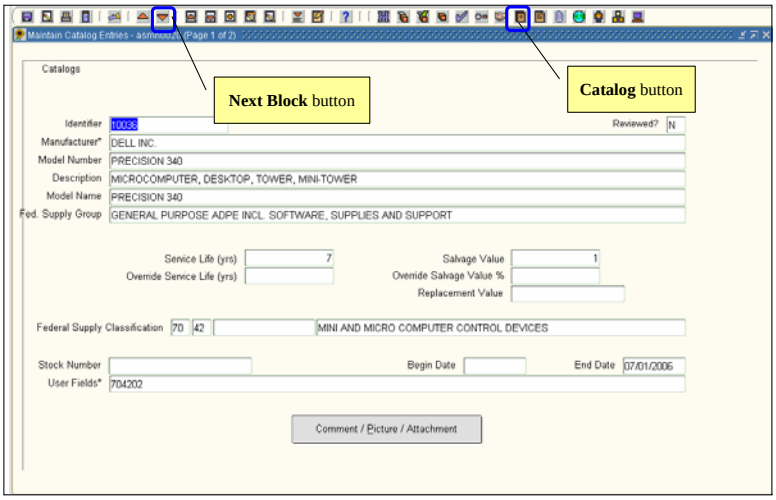


To view specific details about a property detail, select the **Details (plus sign)** button next to the field.

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

View the Catalog Information

SF4.5



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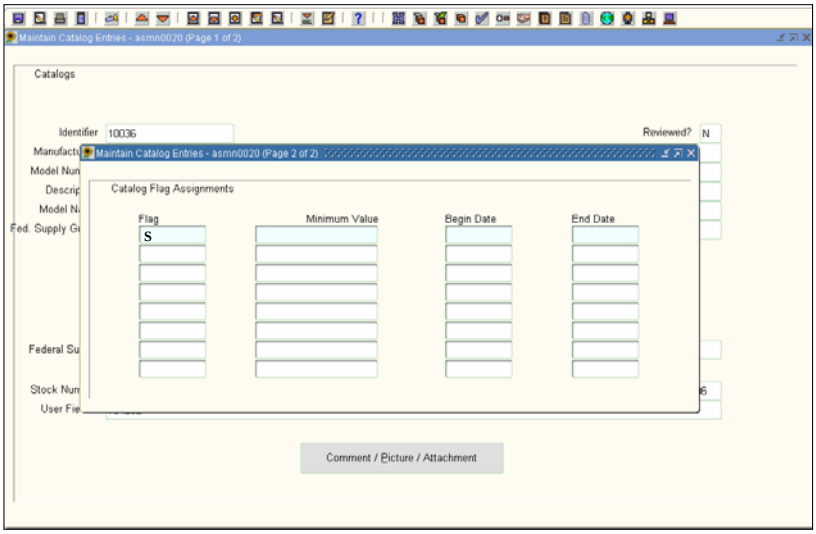
A property record's catalog information can be viewed by selecting the **Catalog** button from the toolbar from any screen in the Sunflower System.

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

<u>Remember</u>: Contact the Administrator for catalog updates.

View Sensitive Catalog Information

SF4.5



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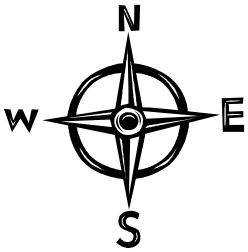
This view shows whether or not the catalog item is **Sensitive.**

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

NAV: View Asset Timeline History

SF4.5



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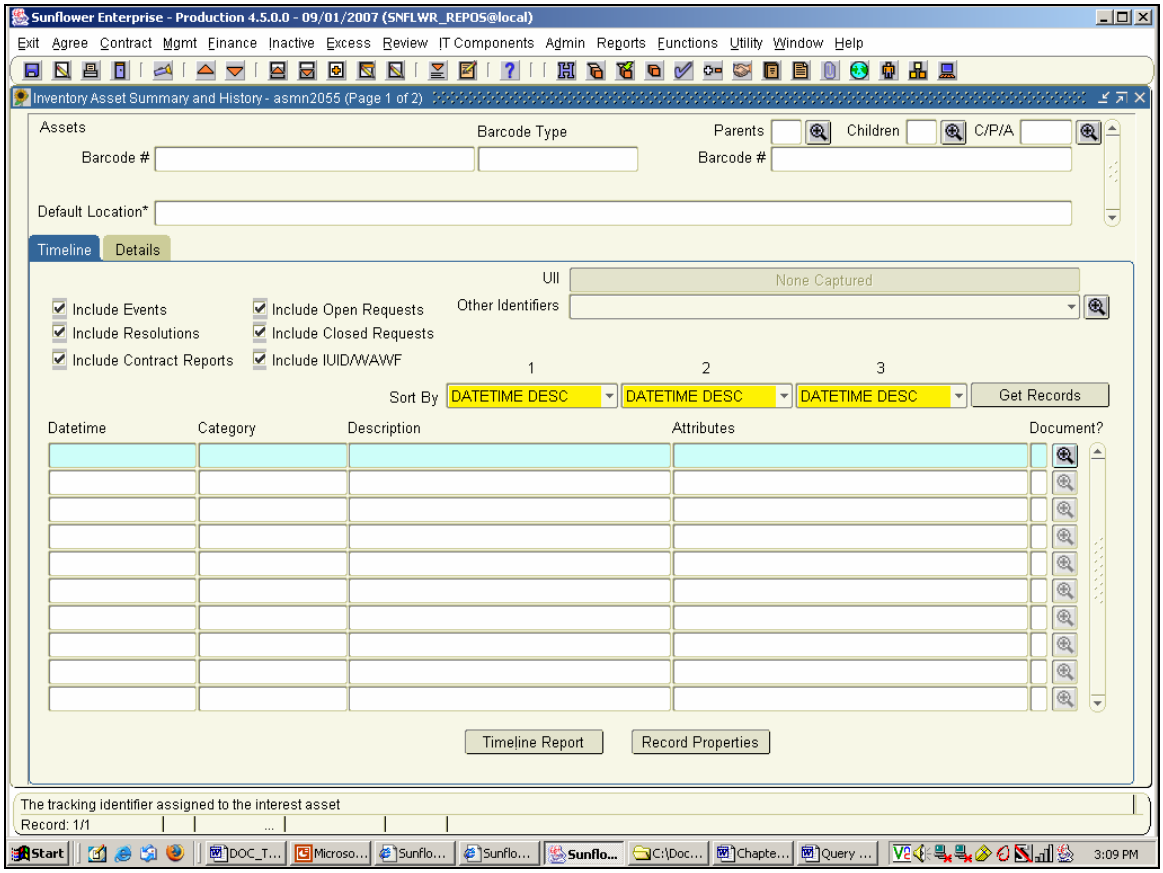
View Asset Timeline History

Inventory Clerk/ Inventory Manager
M > Mgmt > Inventory Asset Summary and History
Inventory Asset Summary and History



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

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

<u>Result:</u> The timeline history autofills.

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

goto Task#7

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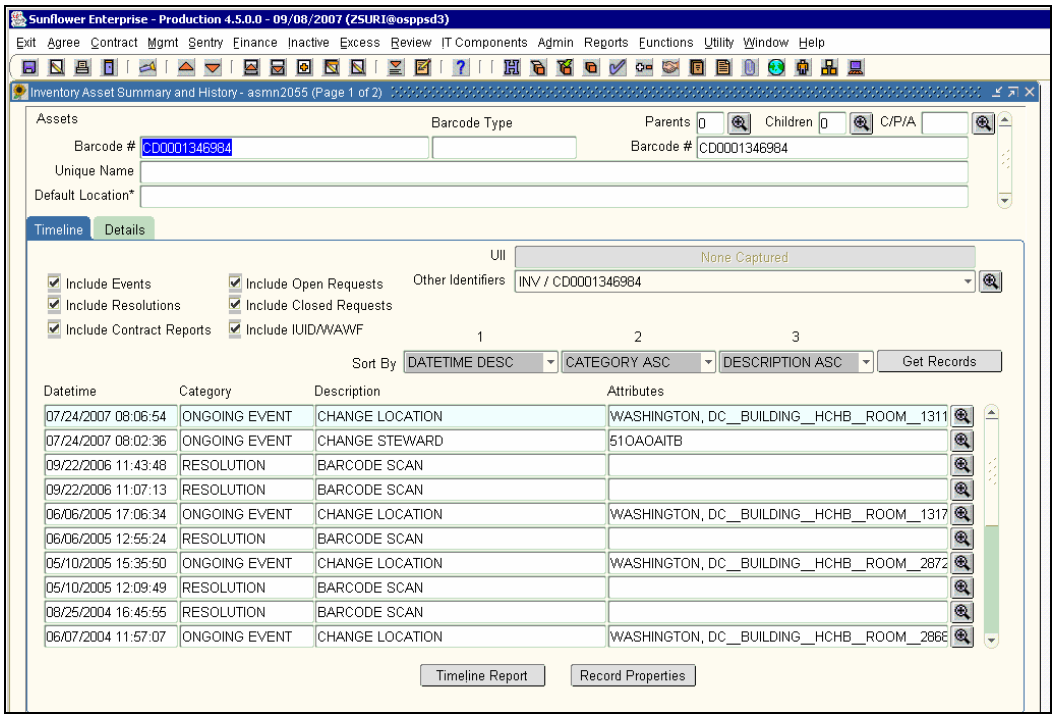

4. Select the **Find** icon from the toolbar to bring up the **Query Criteria** window.

<u>Result</u>: The **Query Criteria** window displays:

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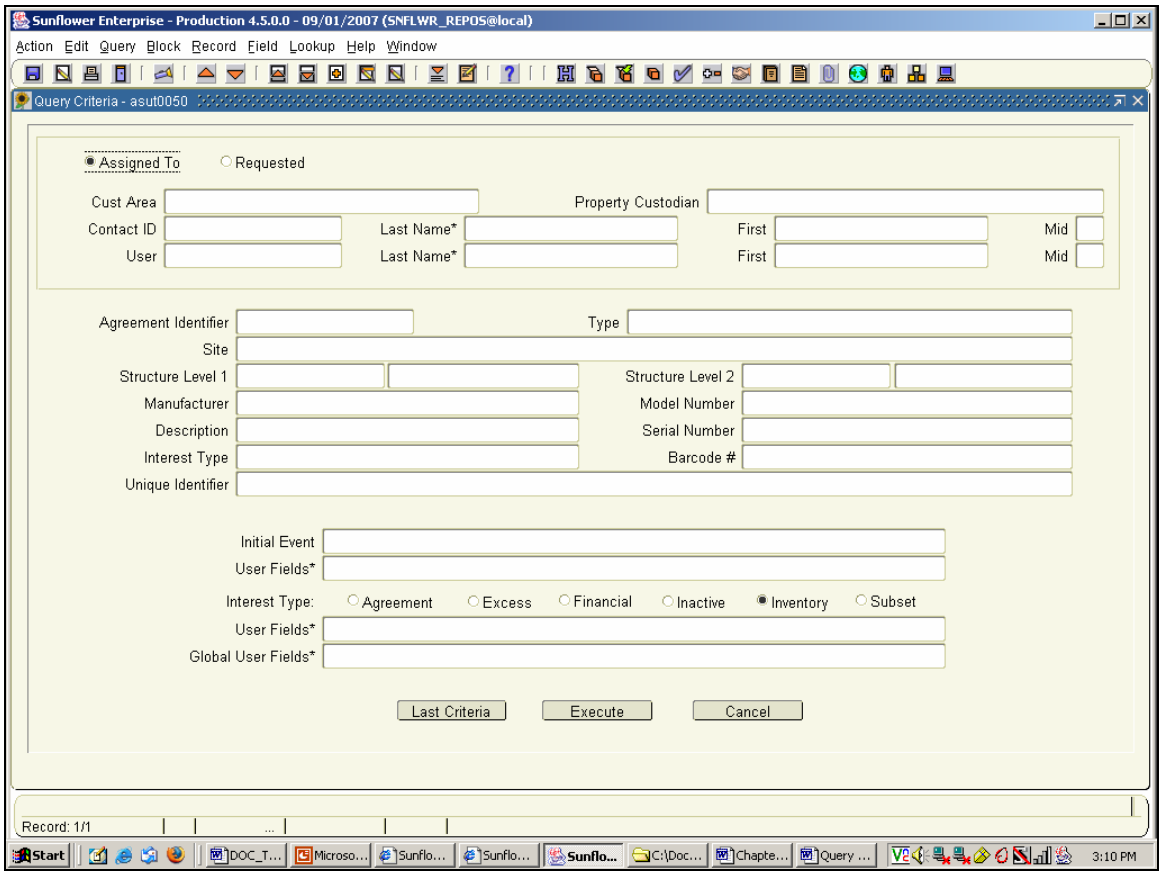

5. Conduct a search using any one of the following criteria. You may choose one for a broad search or many for a narrower search:

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

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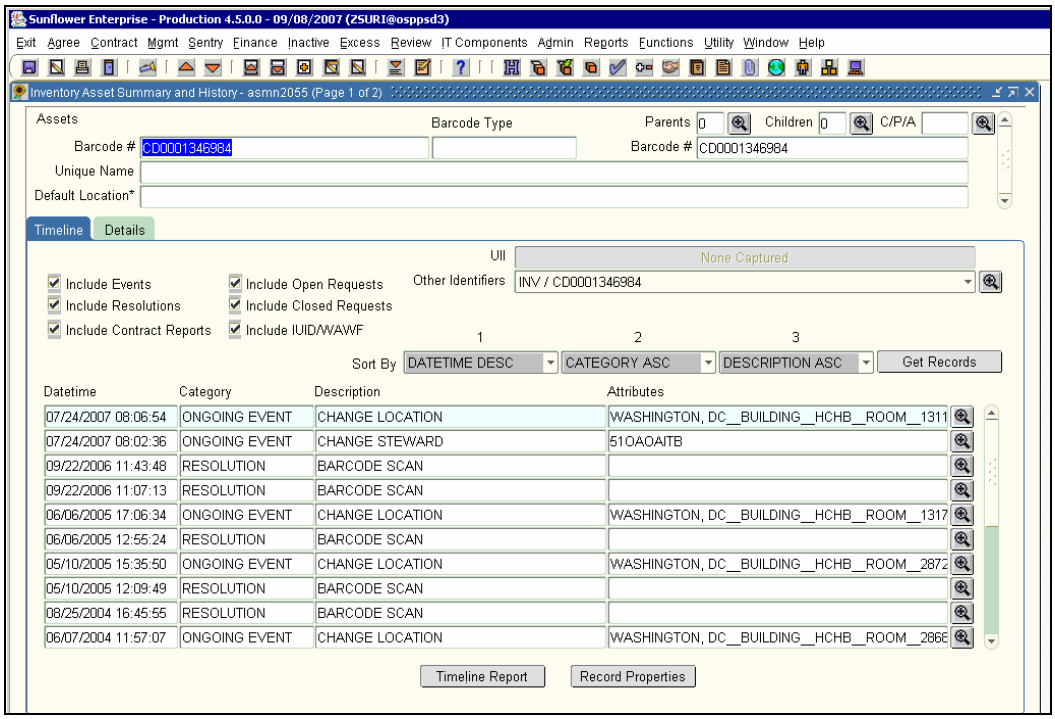
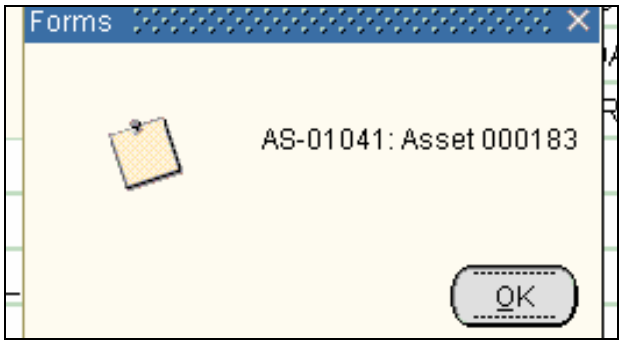
6. Select the **Find** icon from the toolbar once more.

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



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

Result: You receive a message similar to the following:



8. Select the **OK** button.

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

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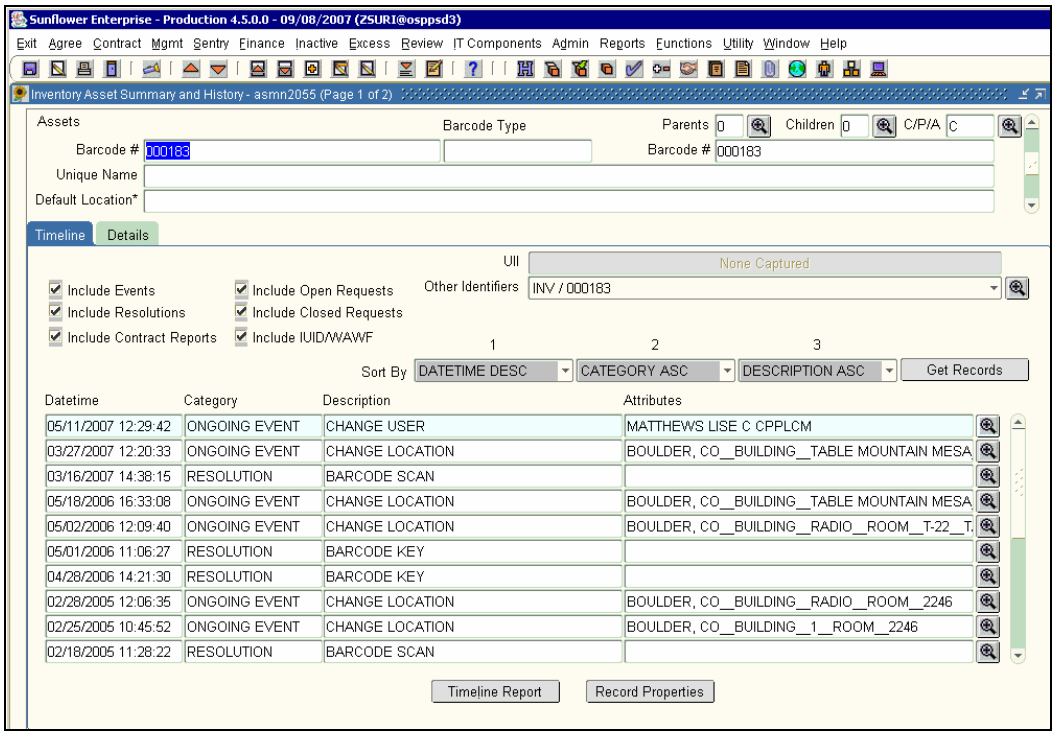

9. Continue scrolling through records as needed.

End of activity.

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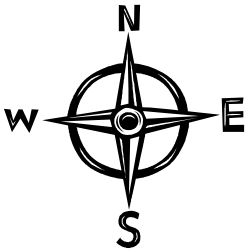
NAV: View Asset Details History

SF4.5



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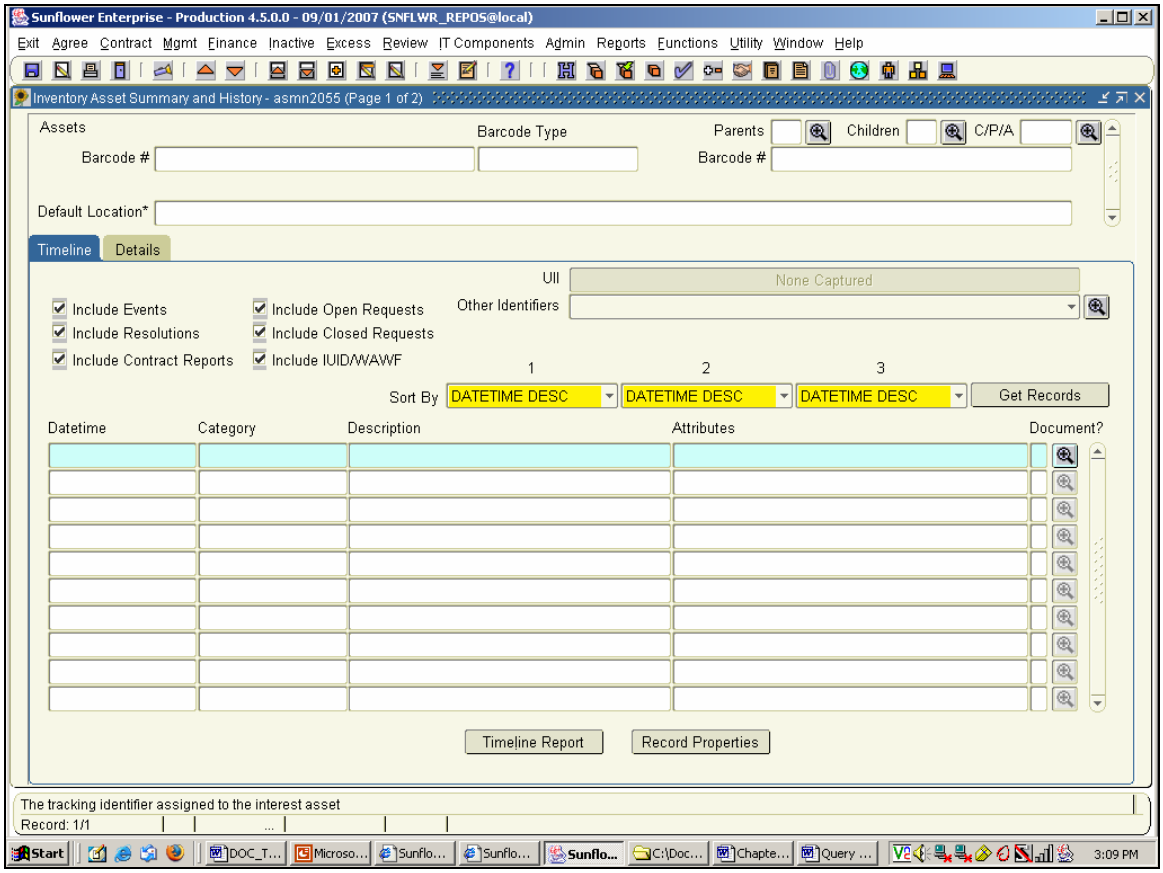
View Asset Details History

Inventory Clerk/ Inventory Manager
M > Mgmt > Inventory Asset Summary and History
Inventory Asset Summary and History



1. Select the **Details tab**.

Result: The Details history screen displays.

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

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

3. Enter the barcode number in the **Barcode #** field.

4. **Tab** out of the field.

Result: The details history autofills.

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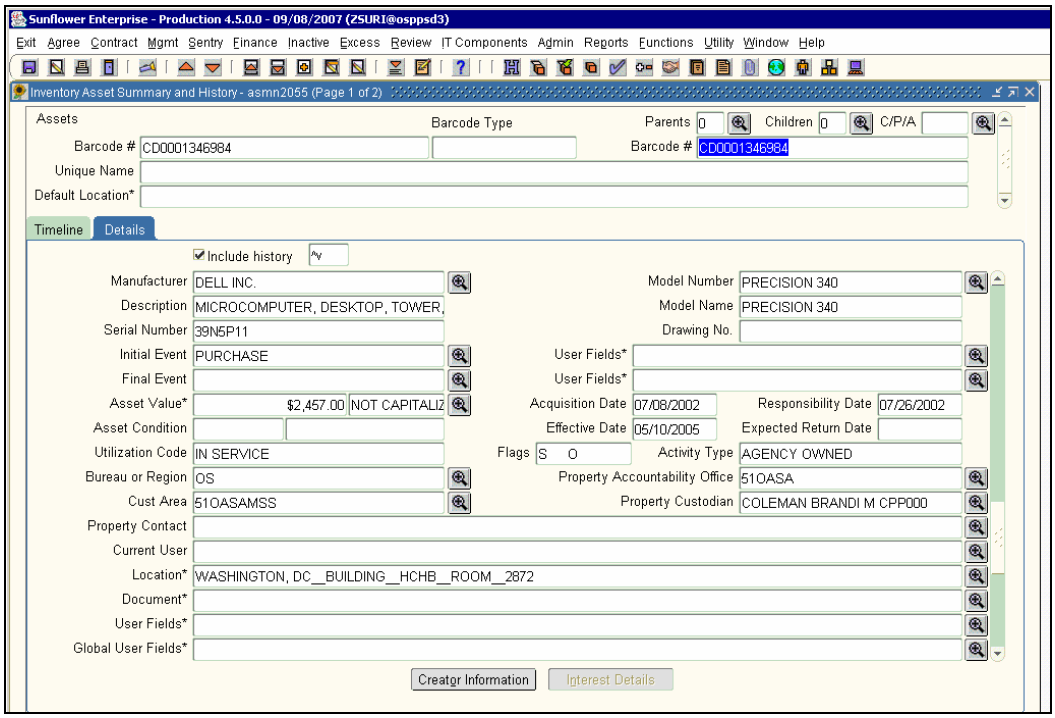

5. Use the **Lookup** (Details) icon to drill down to other associated forms.

Goto task #9

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

<u>Result</u>: The **Query Criteria** window displays:

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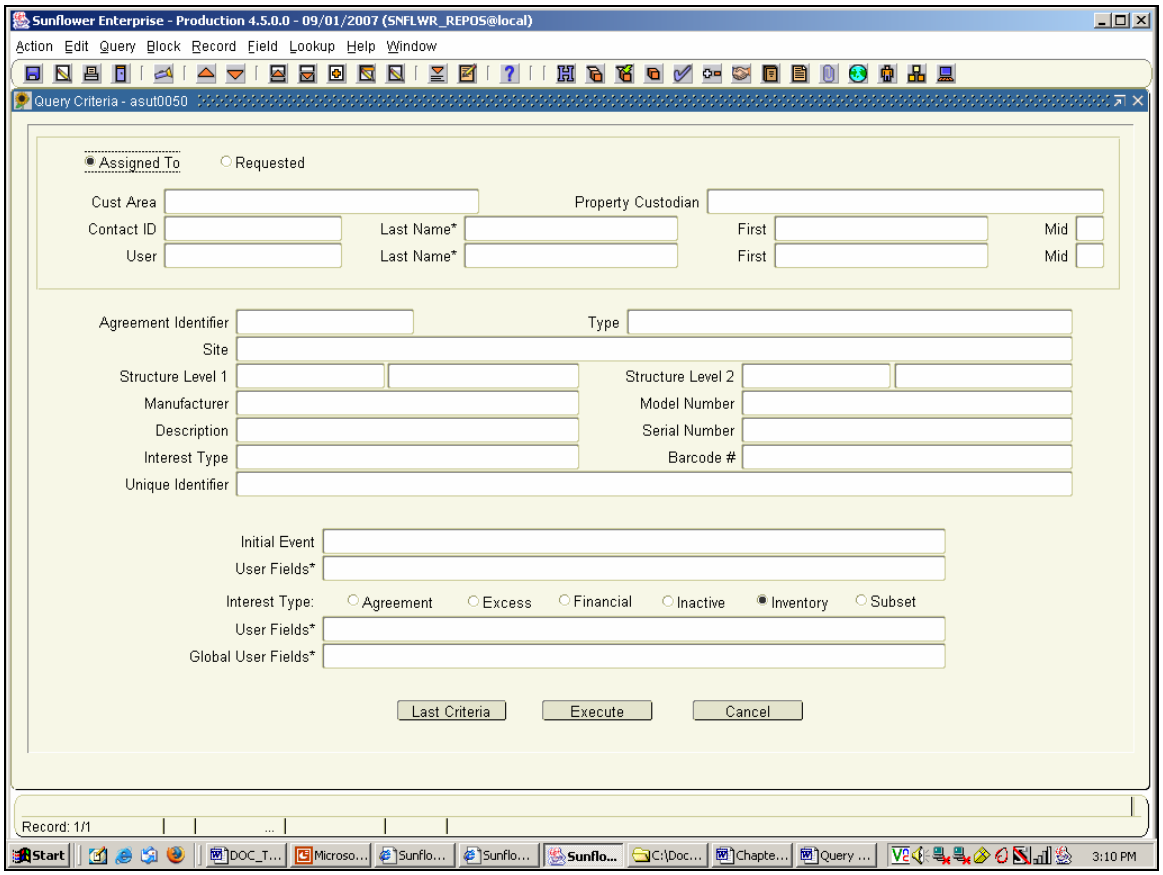

7. Conduct a search using any one of the following criteria. You may choose one for a broad search or many for a narrower search:

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

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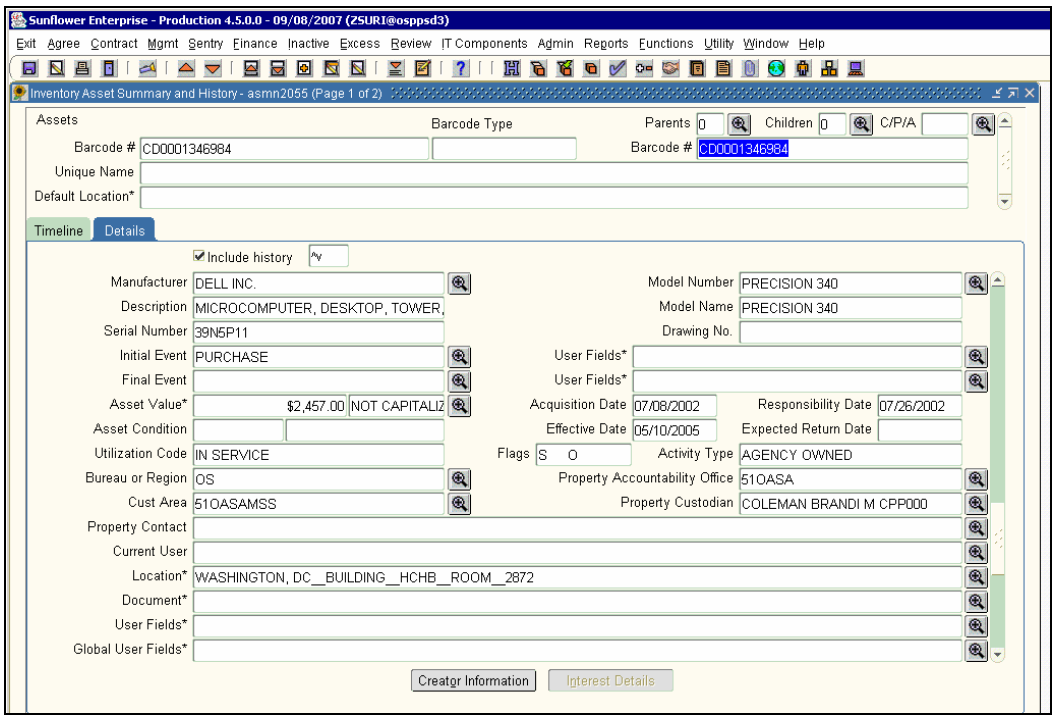
Interest Type	Select Agreement, Excess, Financial, or Inventory.
Initial Event	The initial event of the asset.

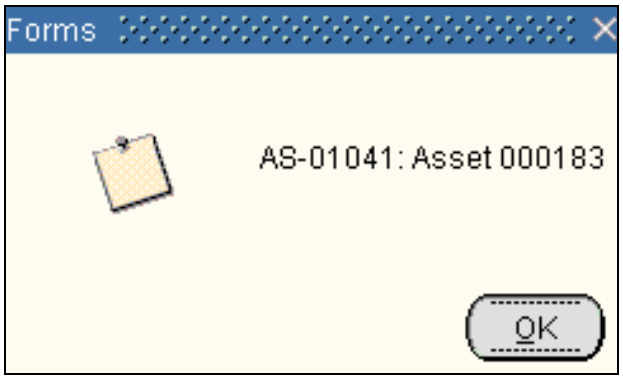
8. Select the **Find** icon from the toolbar once more.

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



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

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



10. Select the **OK** button.

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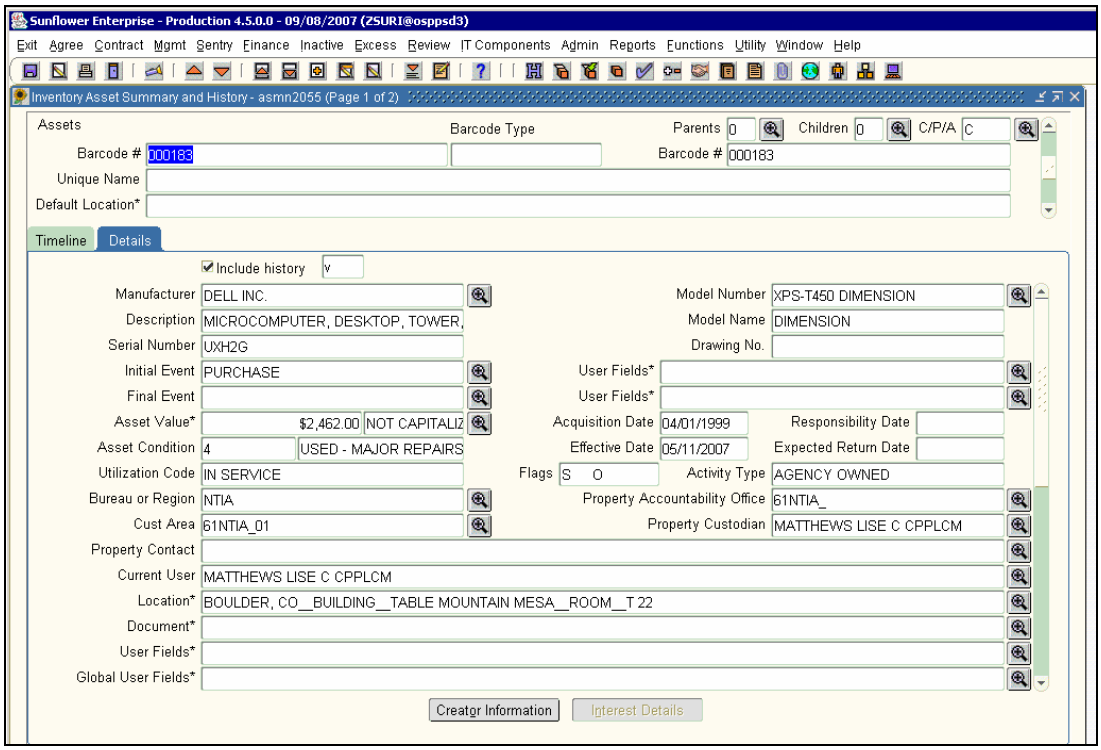
Result: The next property record from the search criteria will display:



11. Continue scrolling through records as needed.

End of activity.

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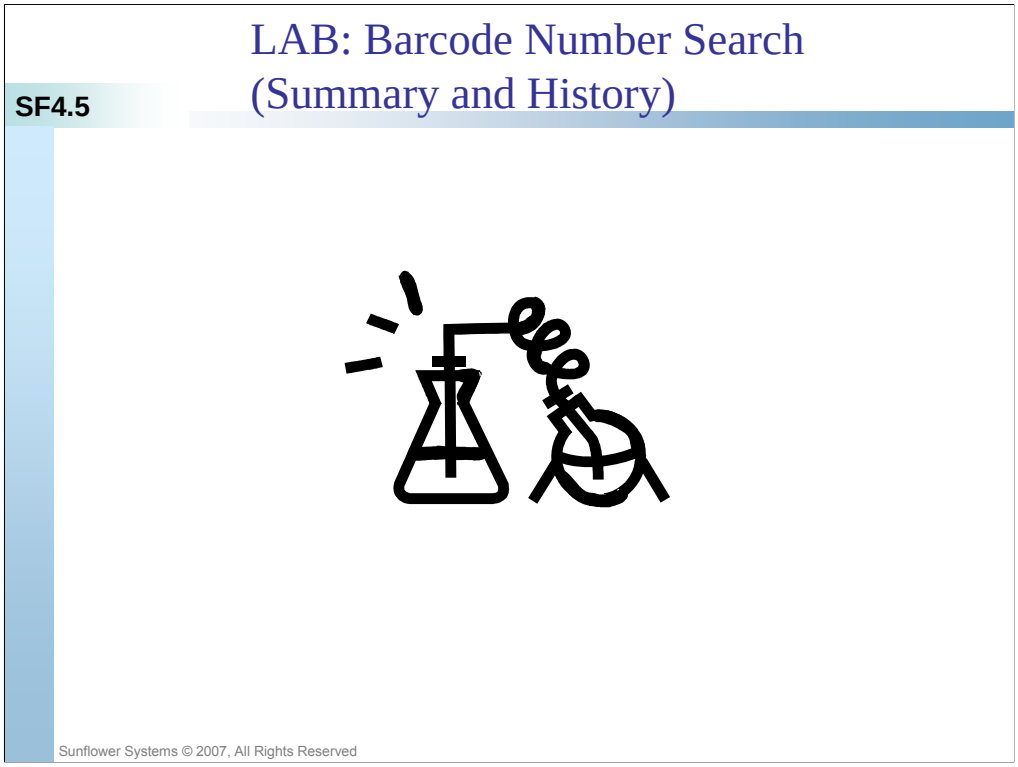
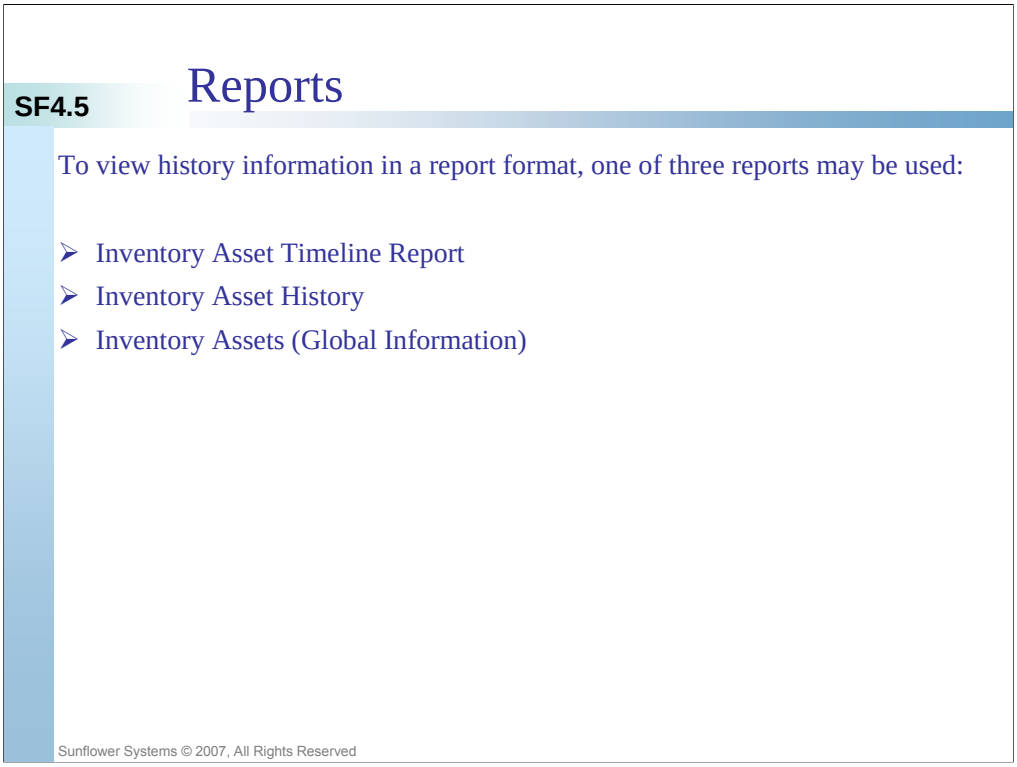


Search the timeline history for asset with the following barcode number:
CD0001346984

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



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

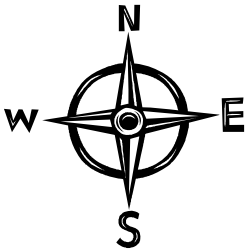
- Inventory Asset Timeline – displays timeline activities by asset identifier
- Inventory Asset History – Shows the detailed changes and who made them
- Inventory Assets (Global Information) – Shows detailed and summary information of assets

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

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

SF4.5

NAV: View Inventory Asset Timeline Report



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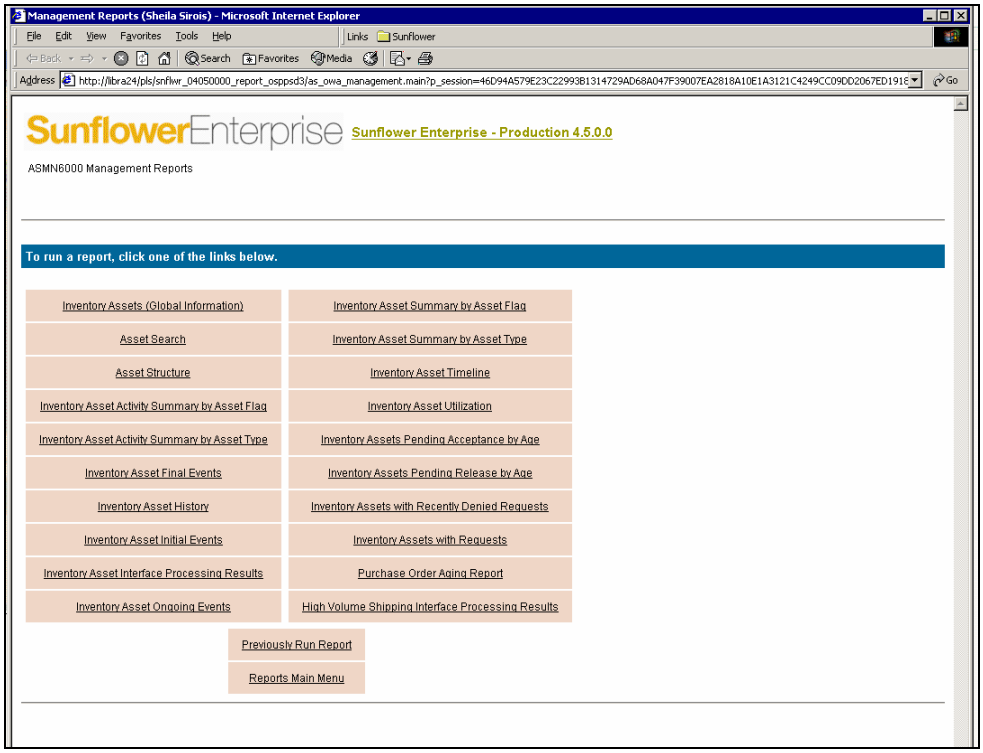
View Inventory Asset Timeline Report

Inventory Clerk/ Inventory Manager
M > Mgmt > Management Reports
Management Reports



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

<u>Result:</u> The report criteria screen displays.

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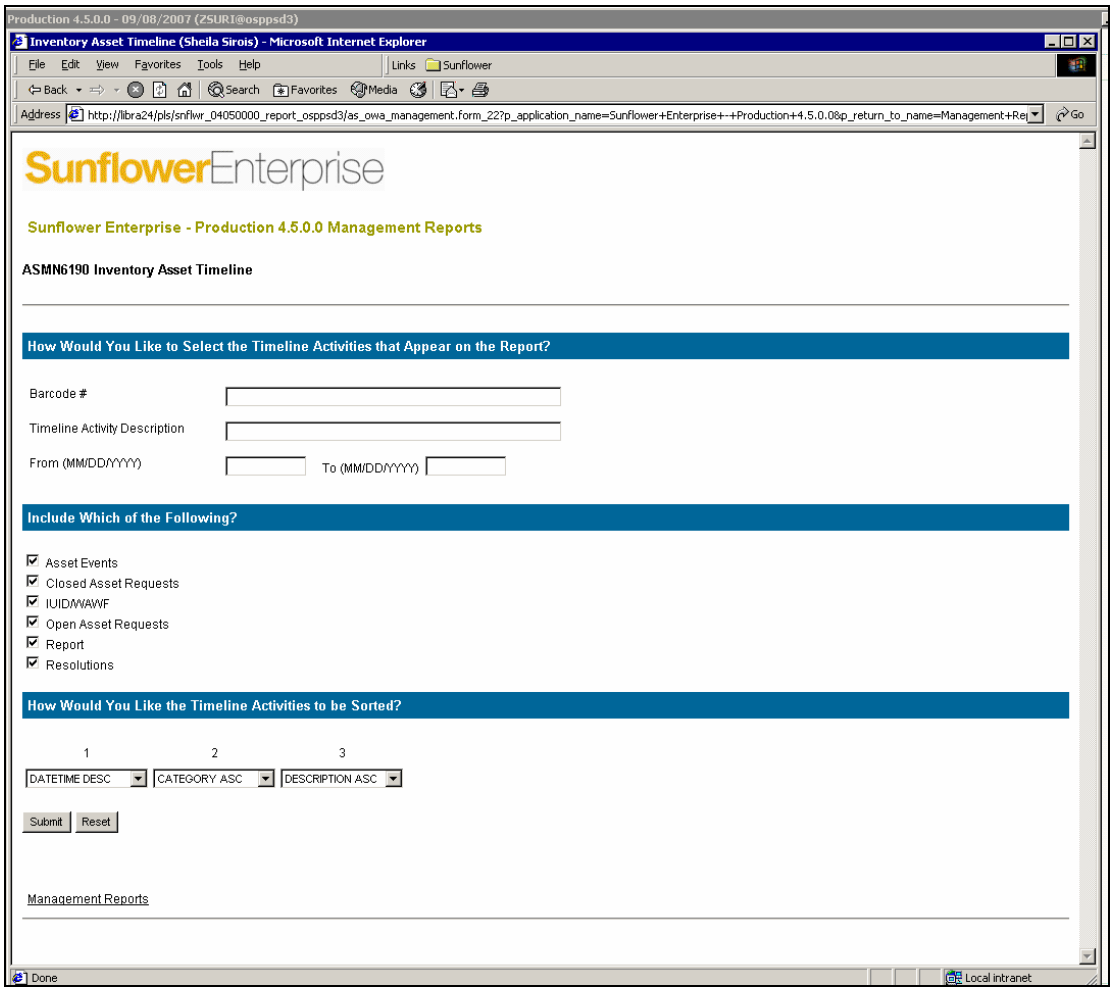

2. Enter the barcode number in the **Barcode #** field.

3. **Tab** out of the field.

4. Enter the Timeline Activity Description in the **Timeline Activity Description** field.

5. **Tab** out of the field.

6. Enter the date range to search using the **From (MM/DD/YYYY)** and the **To (MM/DD/YYYY)** fields.

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

Note: At least one field must be checked.

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

9. Select the **Submit** icon.

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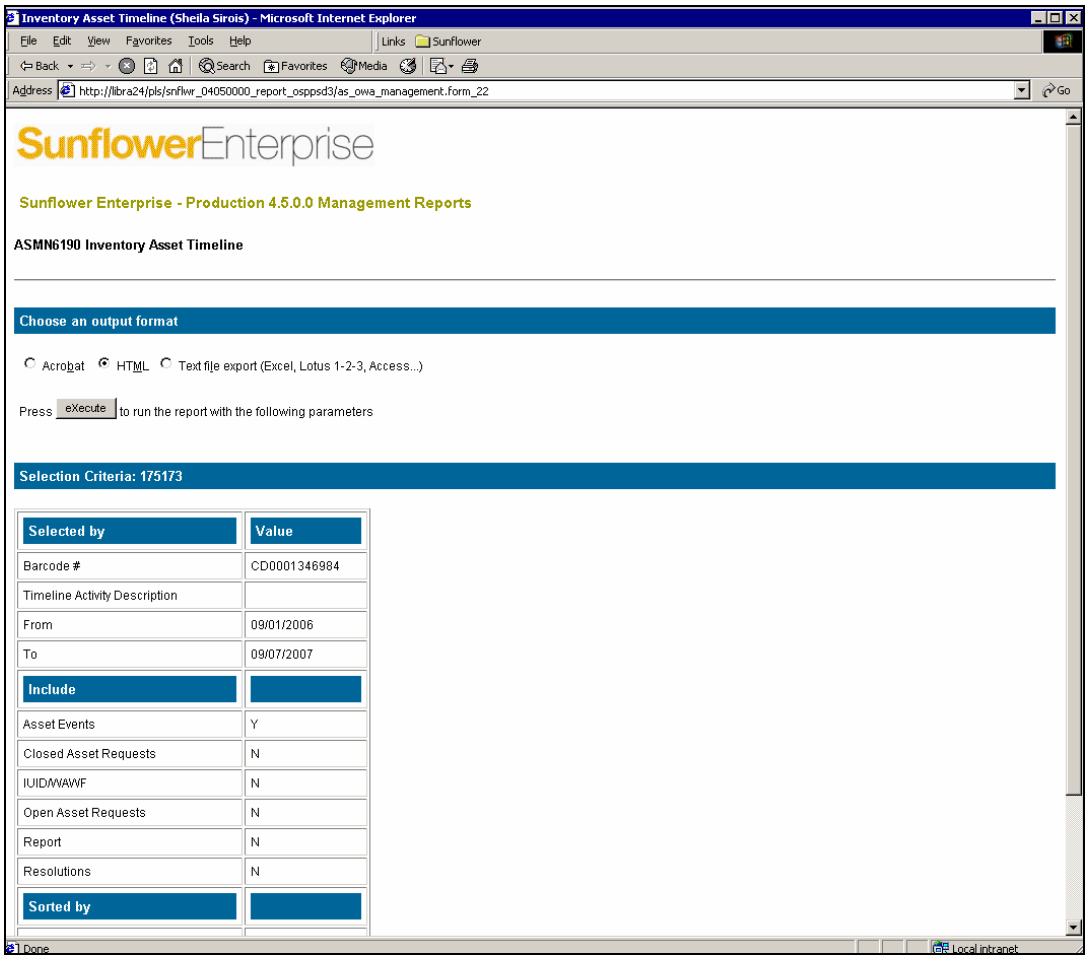
Result: A confirmation and output page displays.



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

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

Result: The Inventory Asset Timeline report displays.

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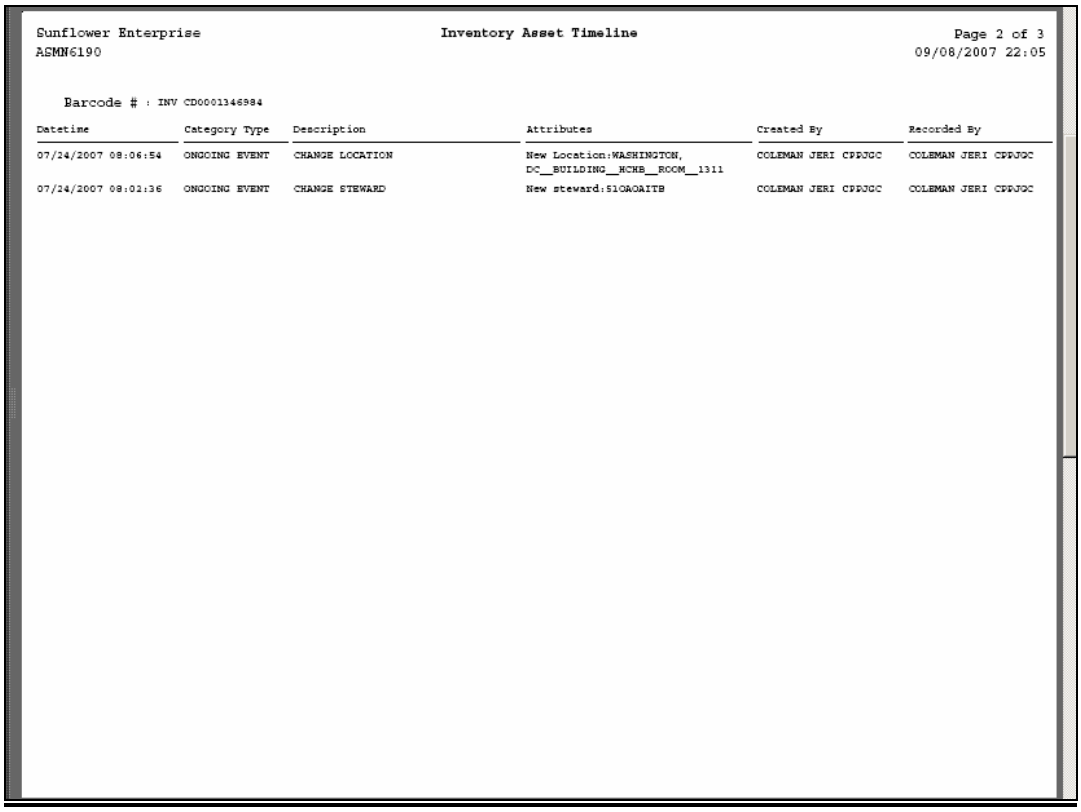

Sunflower Enterprise
ASMN6190

Inventory Asset Timeline

Page 2 of 3
09/08/2007 22:05

Barcode # : INV CD0001346984

Datetime	Category Type	Description	Attributes	Created By	Recorded By
07/24/2007 08:06:54	ONGOING EVENT	CHANGE LOCATION	New Location:WASHINGTON, DC__BUILDING__HCHB__ROOM__1311	COLEMAN JERI CPPJGC	COLEMAN JERI CPPJGC
07/24/2007 08:02:36	ONGOING EVENT	CHANGE STEWARD	New steward:51OAOAITB	COLEMAN JERI CPPJGC	COLEMAN JERI CPPJGC

11. Use the scrollbar to scroll through the report.

End of activity.

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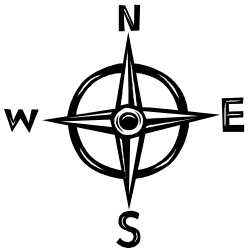
SF4.5

NAV: View Inventory Asset History Report



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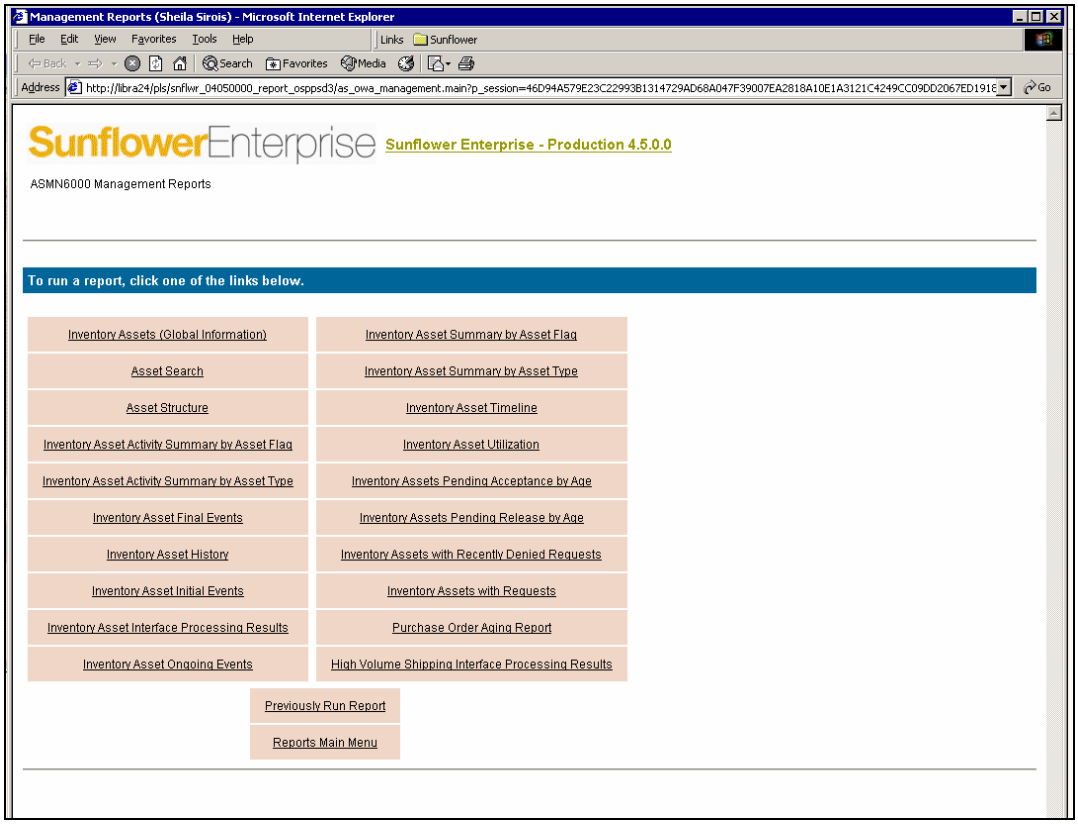
View Inventory Asset History Report

Inventory Clerk/ Inventory Manager
M > Mgmt > Management Reports
Management Reports



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

<u>Result:</u> The report criteria screen displays.

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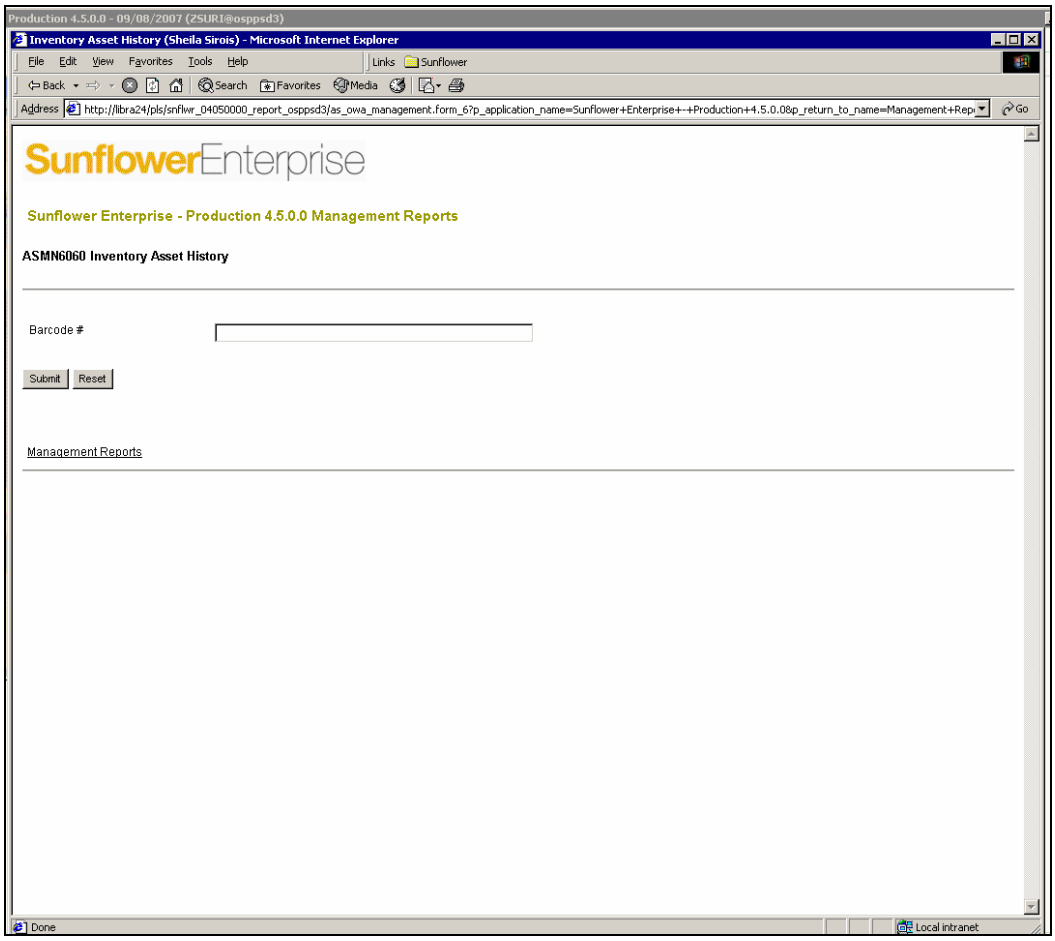


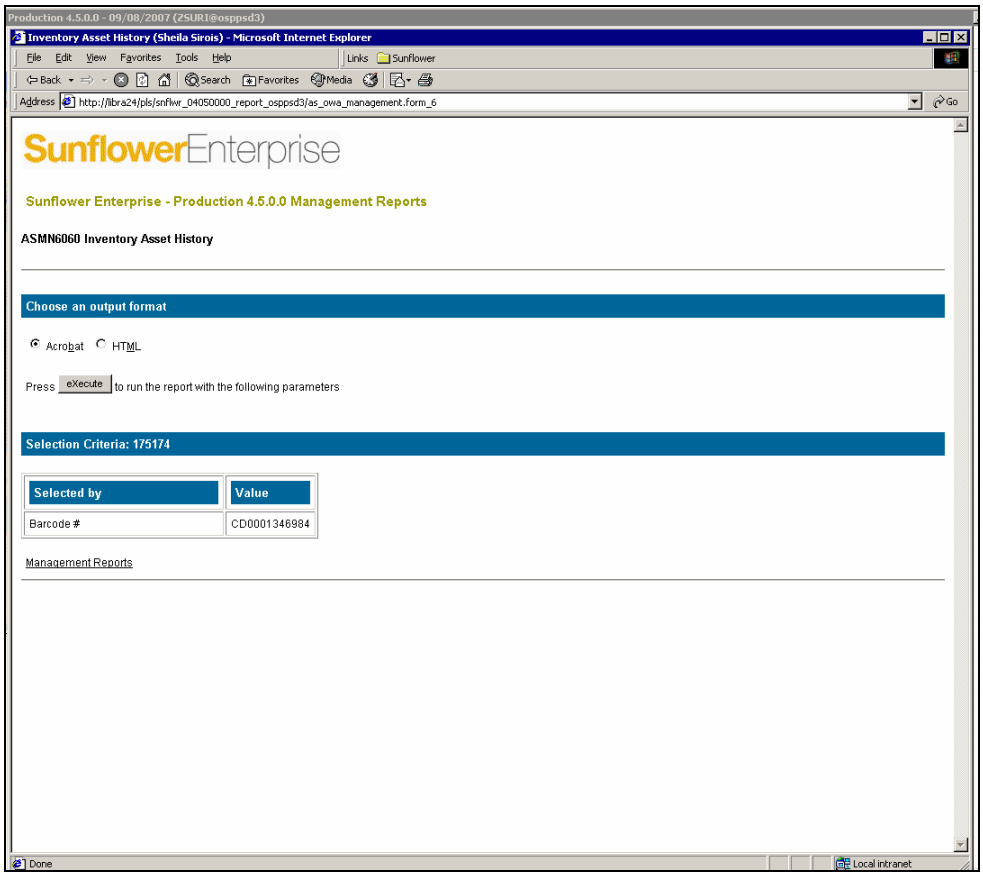
2. Enter the barcode number in the **Barcode #** field.

3. **Tab** out of the field.

4. Select the **Submit** icon.

Result: A confirmation and output page displays.

Sunflower Systems © 2007, All Rights Reserved



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

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

Result: The Inventory Asset History report displays.

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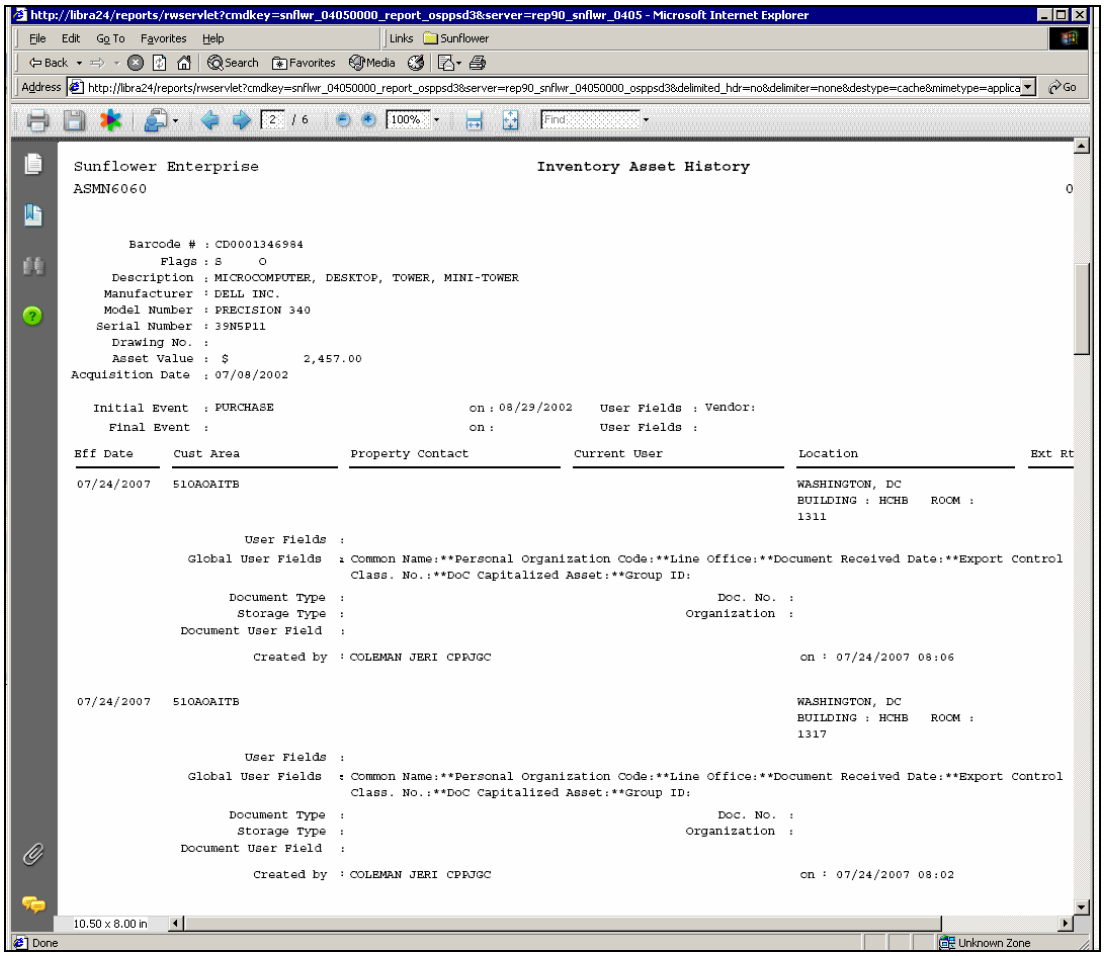

Sunflower Enterprise Inventory Asset History
ASMN6060 0

Barcode # : CD0001346984
Flags : S O
Description : MICROCOMPUTER, DESKTOP, TOWER, MINI-TOWER
Manufacturer : DELL INC.
Model Number : PRECISION 340
Serial Number : 39N5P11
Drawing No. :
Asset Value : $ 2,457.00
Acquisition Date : 07/08/2002

Initial Event : PURCHASE on : 08/29/2002 User Fields : Vendor:
Final Event : on : User Fields :

Eff Date	Cust Area	Property Contact	Current User	Location	Ext Rt
07/24/2007	510AOAITB			WASHINGTON, DC BUILDING : HCHB ROOM : 1311	

User Fields :
Global User Fields : Common Name:**Personal Organization Code:**Line Office:**Document Received Date:**Export Control Class. No.:**DoC Capitalized Asset:**Group ID:
Document Type : Doc. No. :
Storage Type : Organization :
Document User Field :
Created by : COLEMAN JERI CPRJGC on : 07/24/2007 08:06

07/24/2007	510AOAITB			WASHINGTON, DC BUILDING : HCHB ROOM : 1317	

User Fields :
Global User Fields : Common Name:**Personal Organization Code:**Line Office:**Document Received Date:**Export Control Class. No.:**DoC Capitalized Asset:**Group ID:
Document Type : Doc. No. :
Storage Type : Organization :
Document User Field :
Created by : COLEMAN JERI CPRJGC on : 07/24/2007 08:02

6. Use the scrollbar to scroll through the report.

End of activity.

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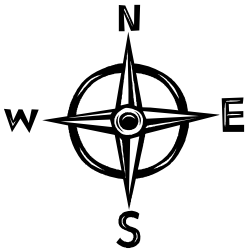
SF4.5

NAV: View Inventory Asset Global Information Report



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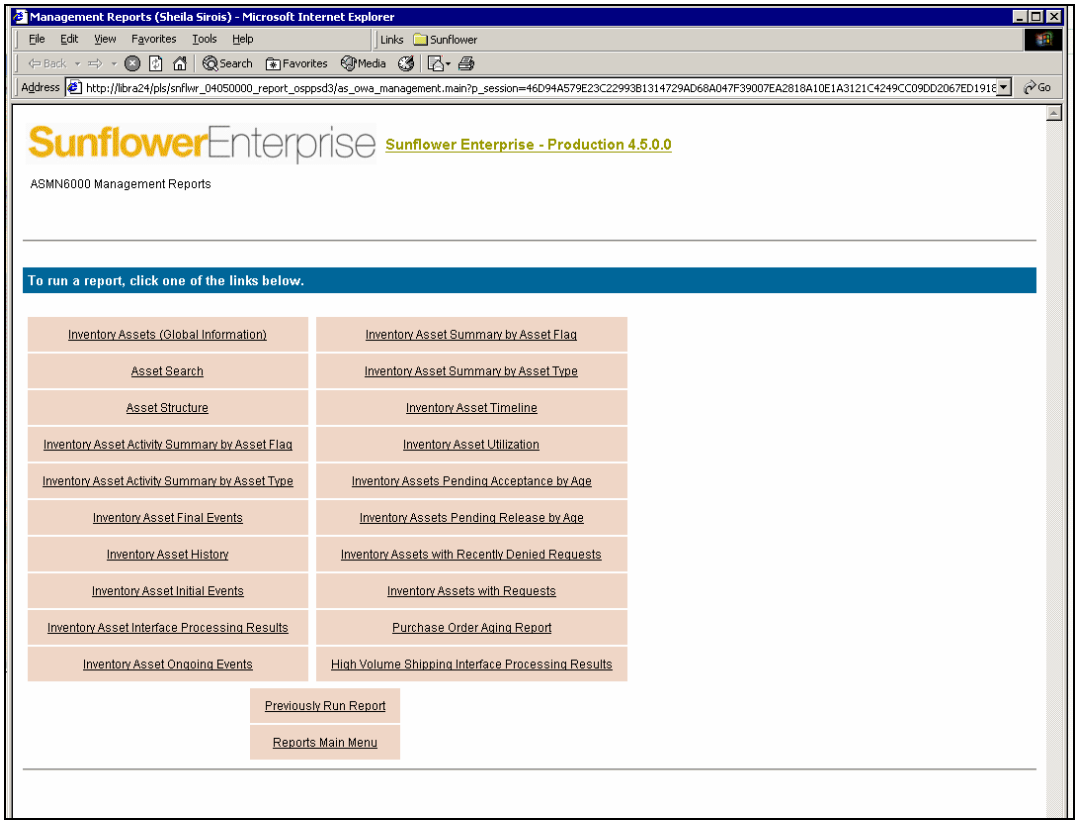
View Inventory Asset History Report

Inventory Clerk/ Inventory Manager
M > Mgmt > Management Reports
Management Reports



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

<u>Result:</u> The report criteria screen displays.

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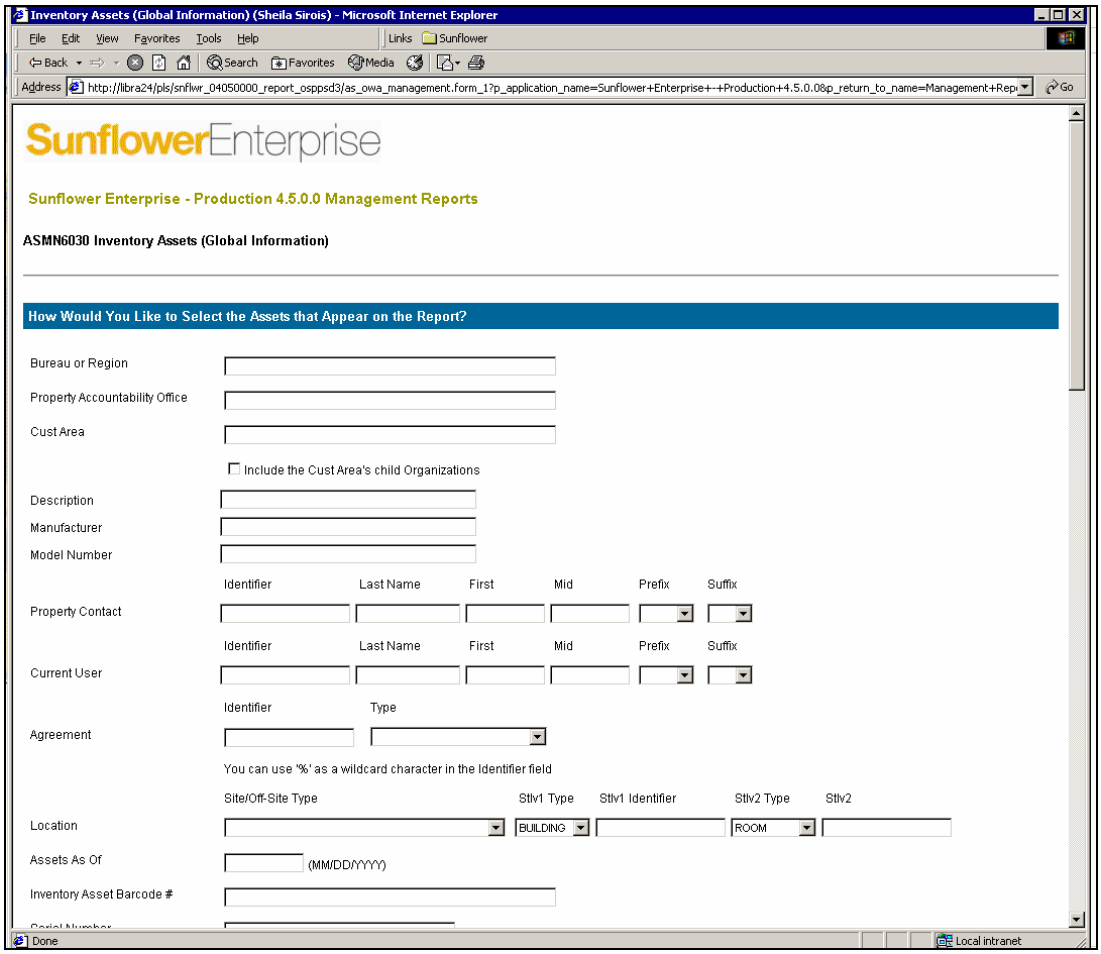

2. Enter the search criteria in the fields provided.

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

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

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

Note: At least one field must be checked.

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

6. Select the **Submit** icon.

Result: A confirmation and output page displays.

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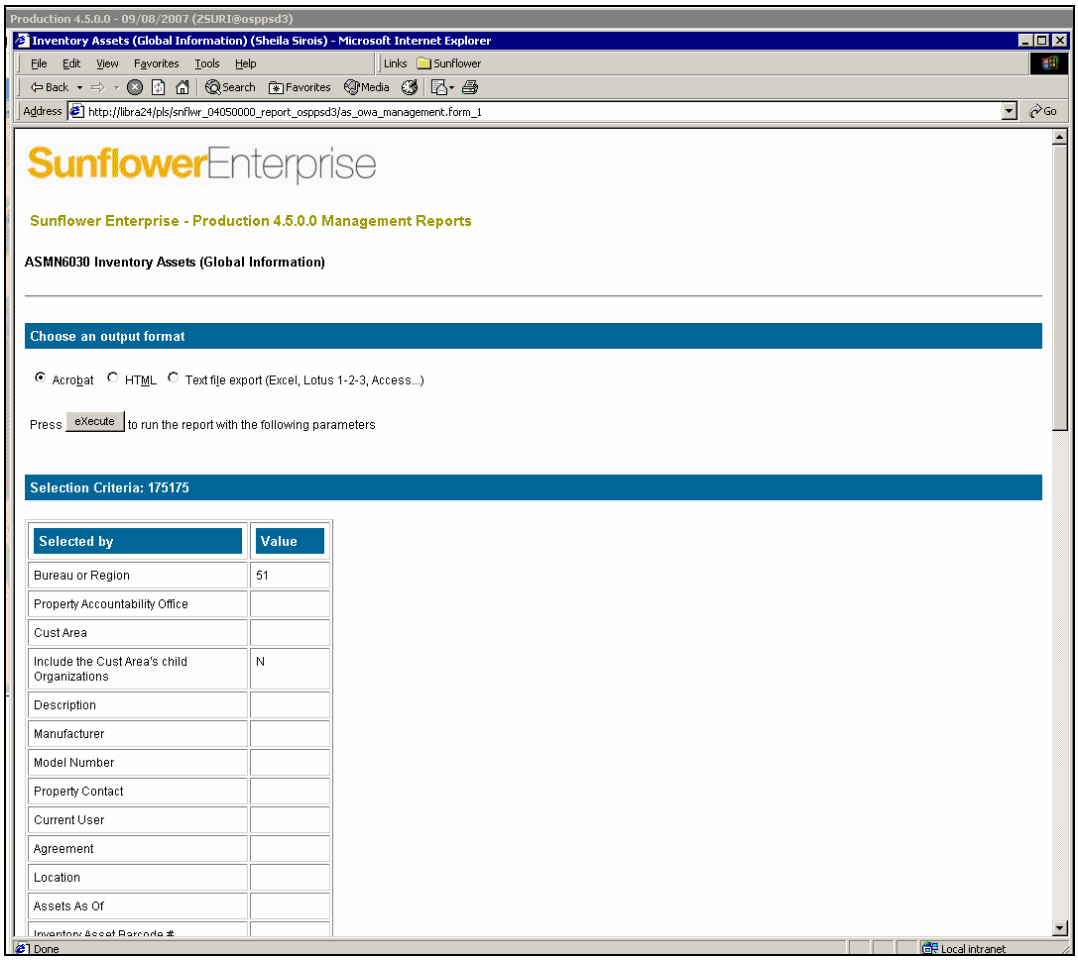

7. Select the **Acrobat** radio button.

8. Review the criteria and select **eXecute**.

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

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

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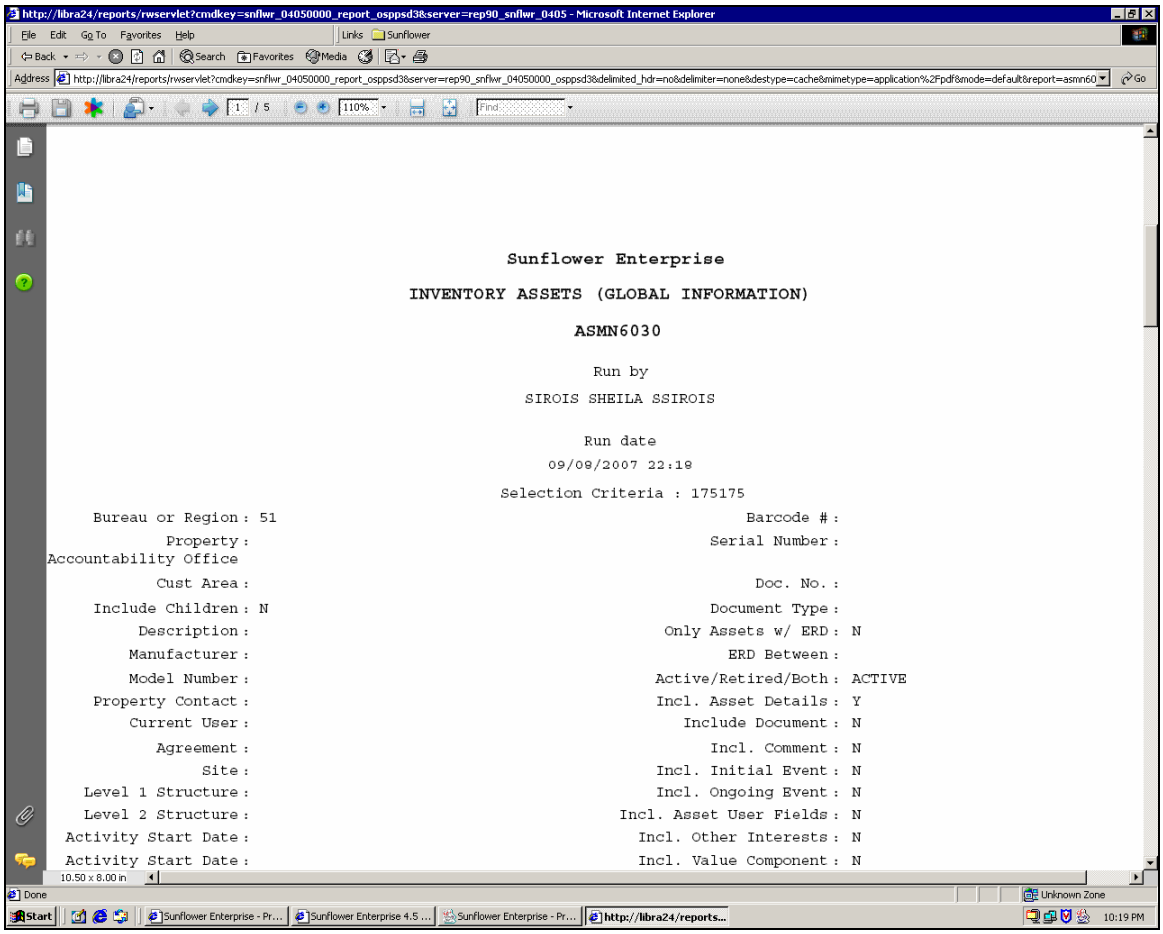

Sunflower Enterprise

INVENTORY ASSETS (GLOBAL INFORMATION)

ASMN6030

Run by

SIROIS SHEILA SSIROIS

Run date

09/09/2007 22:19

Selection Criteria : 175175

Bureau or Region :	51	Barcode # :	
Property :	Accountability Office	Serial Number :	
Cust Area :		Doc. No. :	
Include Children :	N	Document Type :	
Description :		Only Assets w/ ERD :	N
Manufacturer :		ERD Between :	
Model Number :		Active/Retired/Both :	ACTIVE
Property Contact :		Incl. Asset Details :	Y
Current User :		Include Document :	N
Agreement :		Incl. Comment :	N
Site :		Incl. Initial Event :	N
Level 1 Structure :		Incl. Ongoing Event :	N
Level 2 Structure :		Incl. Asset User Fields :	N
Activity Start Date :		Incl. Other Interests :	N
Activity Start Date :		Incl. Value Component :	N

9. Use the scrollbar to scroll through the report.

End of activity.

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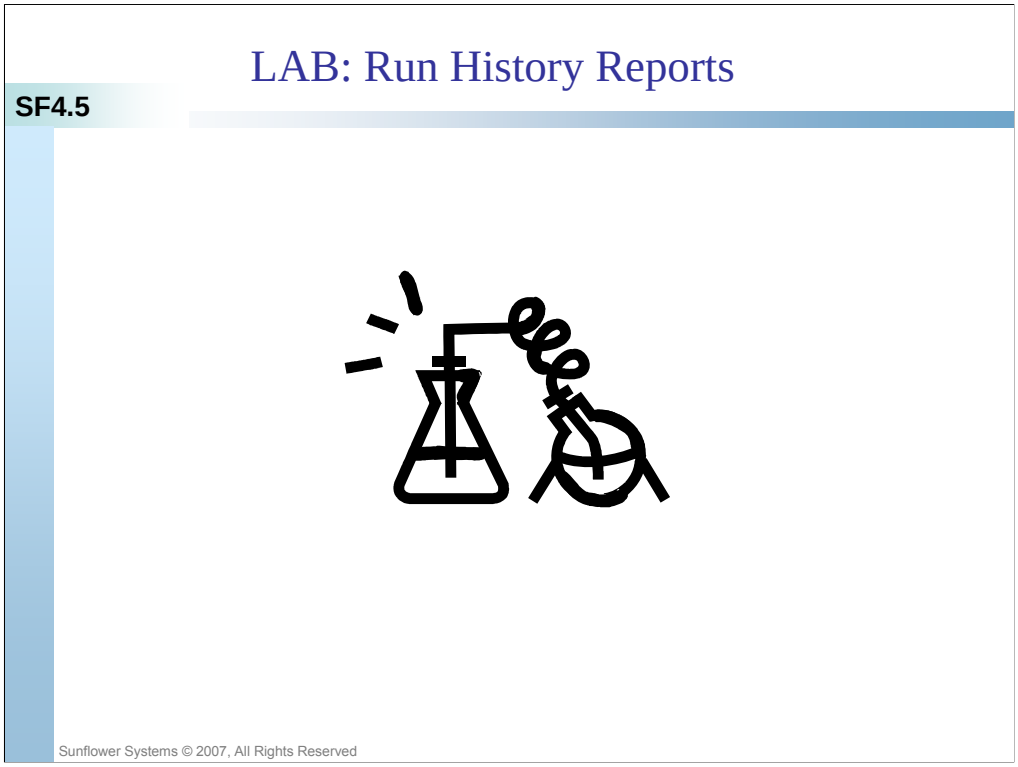

To run the reports use the following information:

- **Inventory Asset Timeline Report**
  - Use Barcode Number: CD0001346984

- **Inventory Asset History Report**
  - Use Barcode Number: CD0001346984

- **Inventory Assets (Global Information) Report**
  - Use Bureau: 55 (ITA)

Lesson Summary

SF4.5

You should now be able to:

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

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SF4.5

Chapter 5:
Changes and Updates

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Lesson Objectives

SF4.5

After this lesson you should be able to:

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

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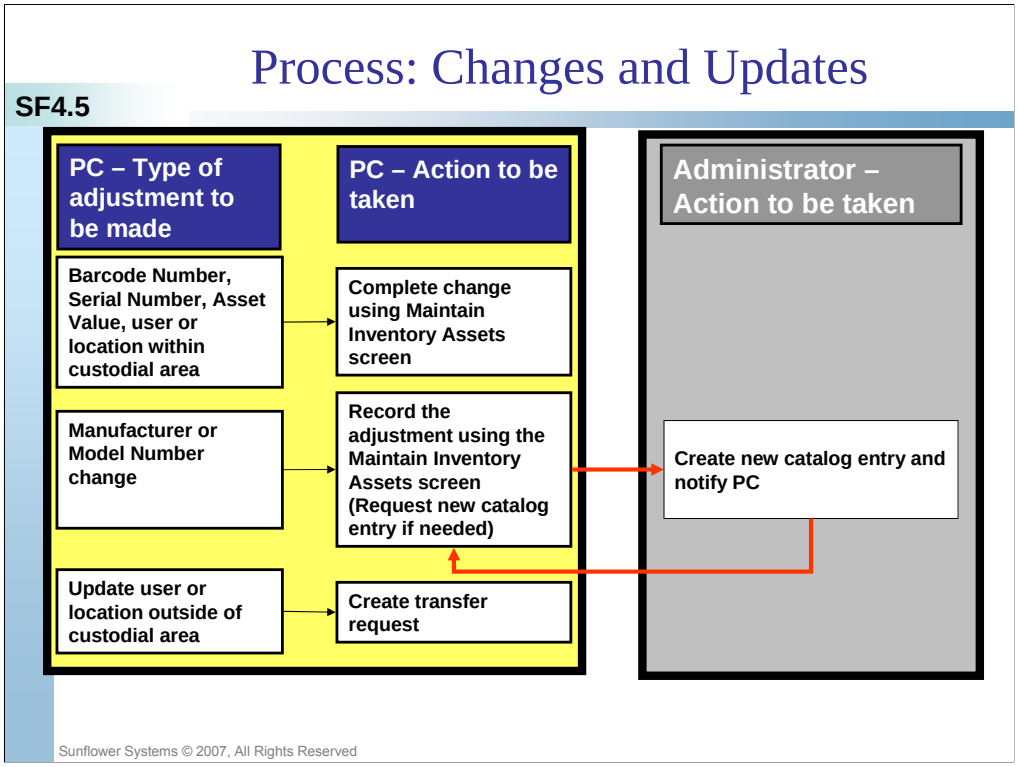
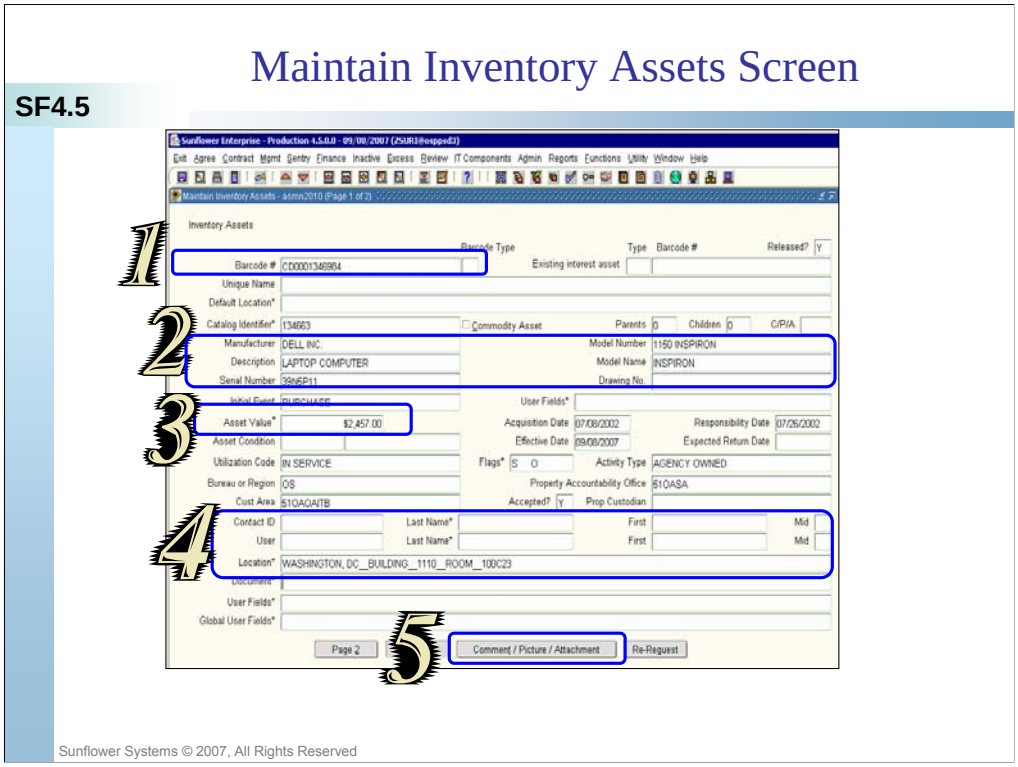


Depending upon the adjustment the property record needs, the PC may make the changes directly or may have to request a new catalog entry to be made.

- Barcode number changes should only be made if entered incorrectly or if an asset is being retagged.
- Any manufacturer, model number, and serial number changes require supporting documentation to prove the necessity of the change. These should only be changed if they were initially entered incorrectly.
- Changes and Updates are made using the **Maintain Inventory Assets** screen.
- Request a new catalog entry from the administrator. The new entry must be created before the manufacturer or model may be changed.
- To make updates to the user or location within your custodial area use the Maintain Inventory Assets screen.
- To make updates to the user or location outside of your custodial area follow the transfer process (see Chapter 6: Transfer Assets).



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

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

<u>Result:</u> The remaining asset information autofills.

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

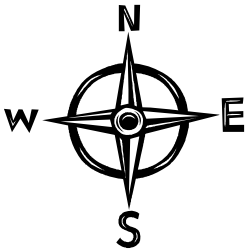
Area 3 Make the required changes for **Asset Value** in this area.

Area 4 Make the required changes for **Custodian, User**, and **Location** in this area. If these fall outside of your custodial area, follow the transfer process.

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

NAV: Update Property Records

SF4.5



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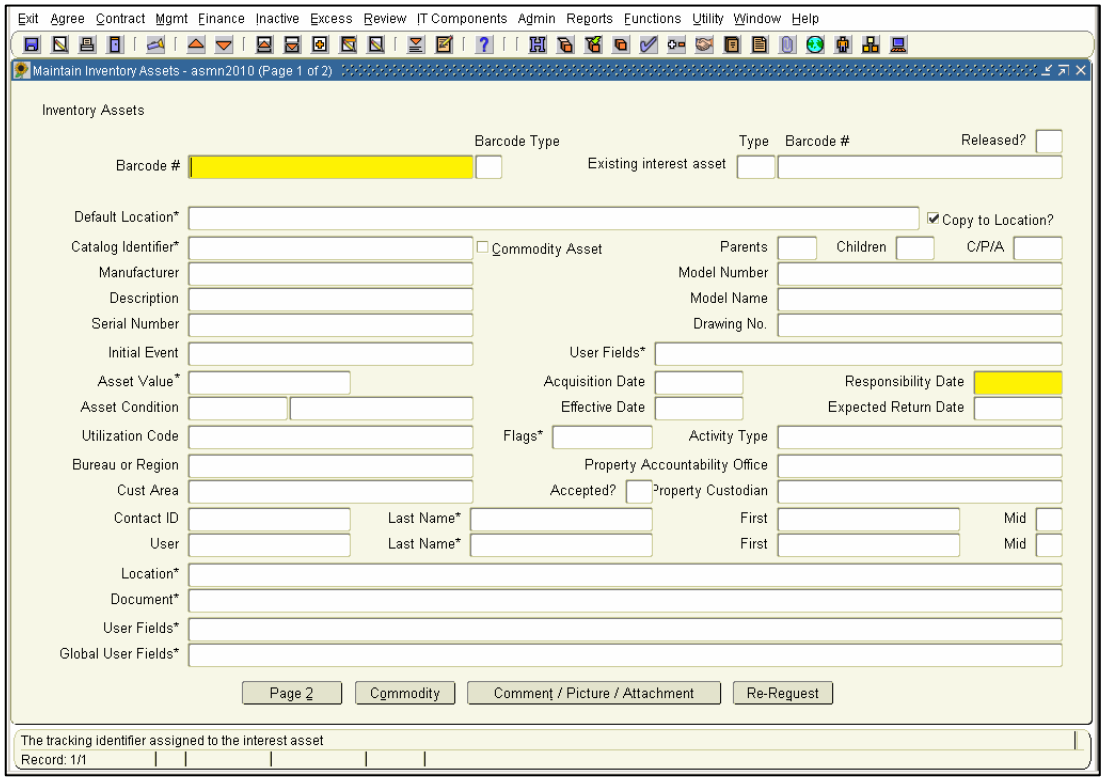
Update a Property Record

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



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

<u>Result:</u> The remainder of the property record auto-populates.

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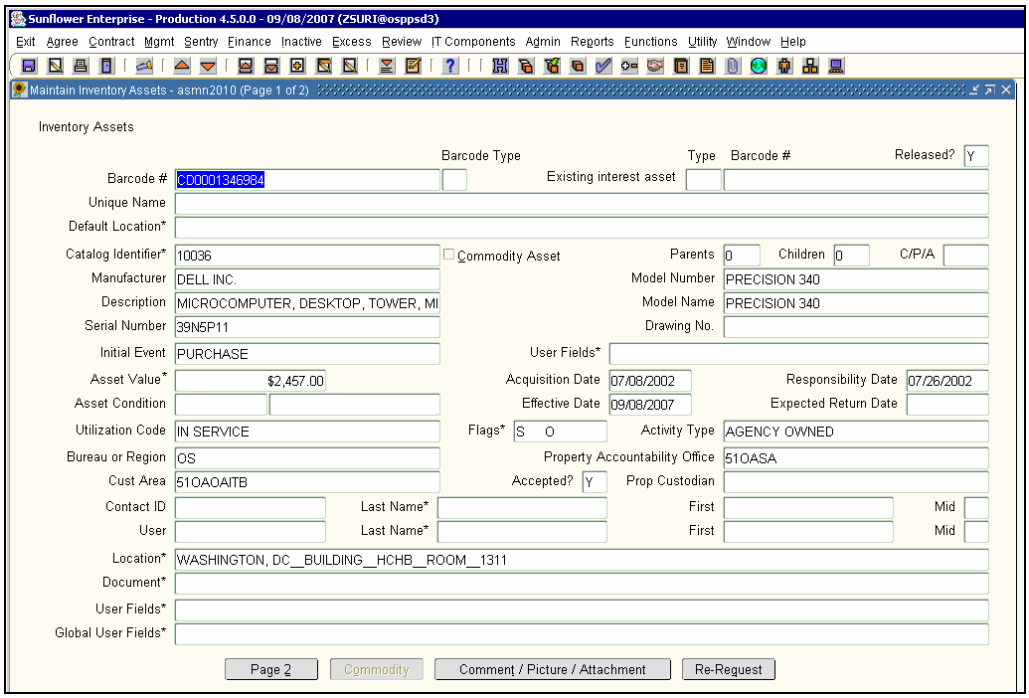

2. Update any necessary fields.

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

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

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

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

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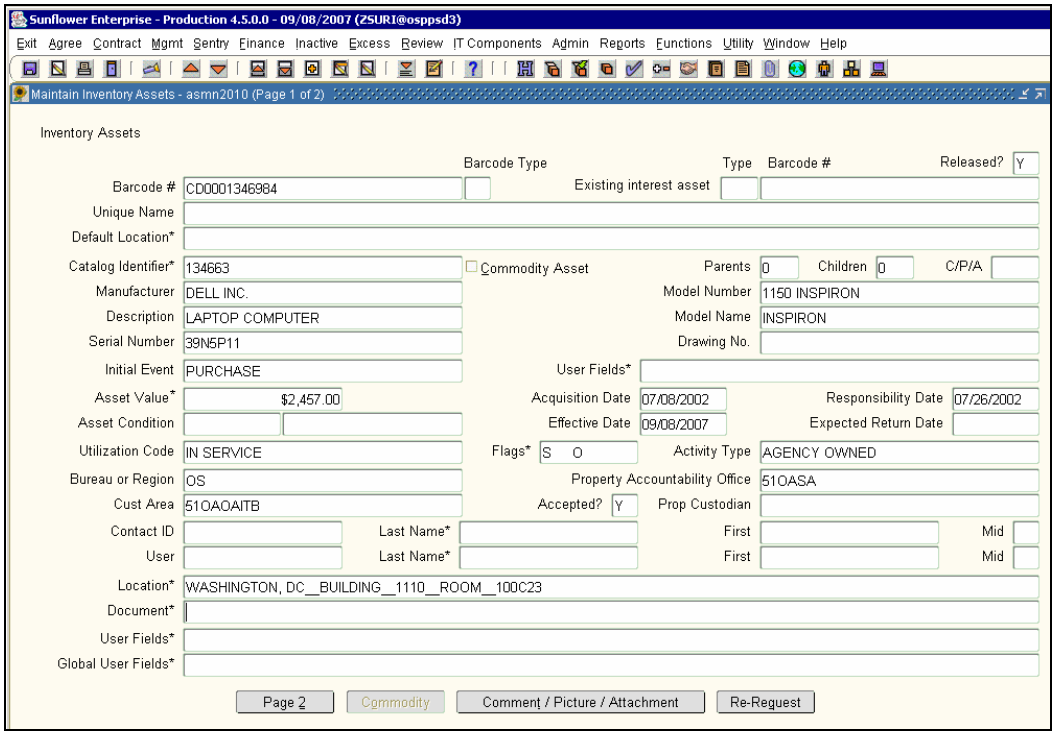
Result: The property record is updated with the new information (in the example below, the **Model Number** and **Location** fields have been modified.)



End of activity.

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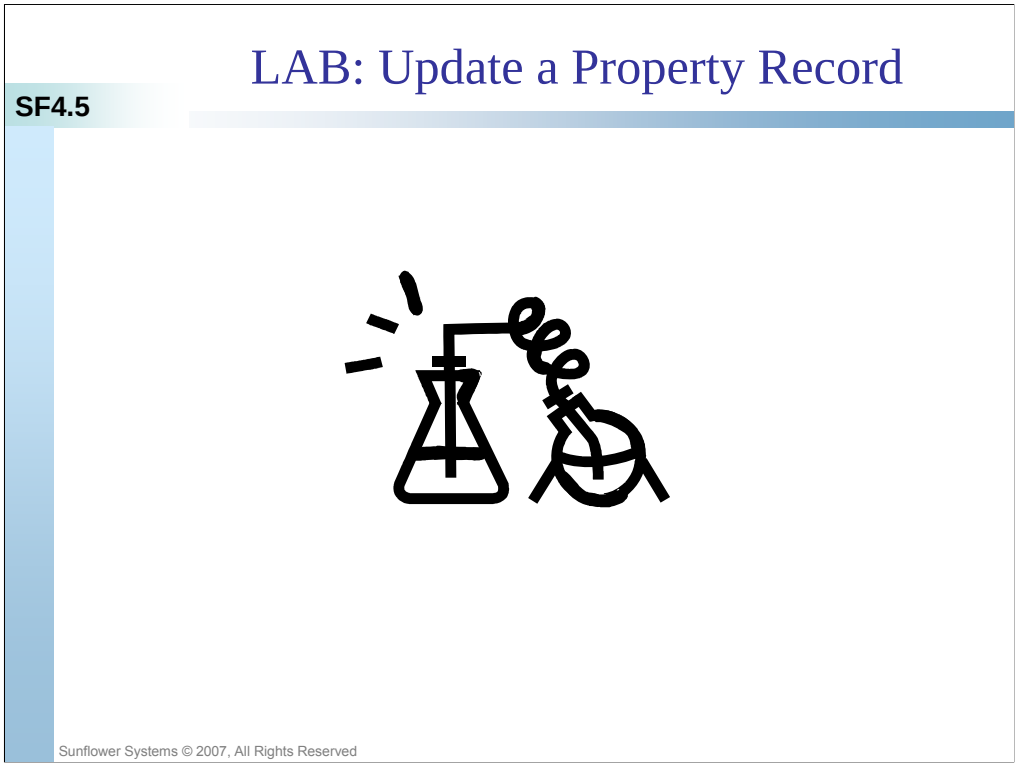
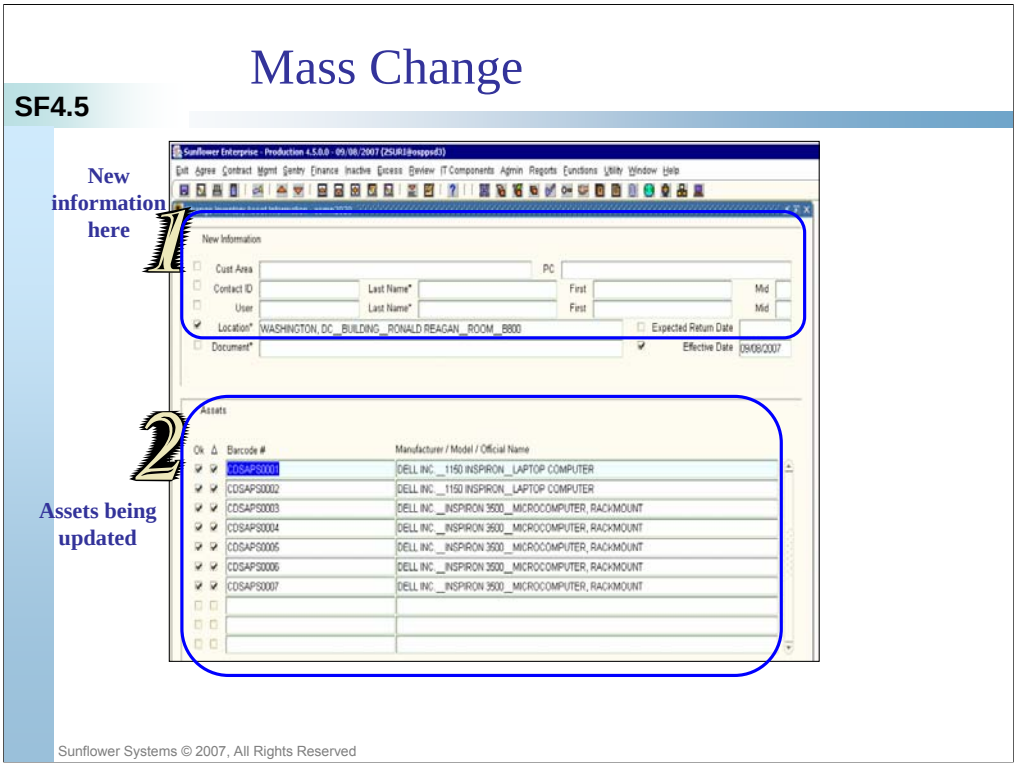


Update the Model Name for the Laptop that you created with Barcode #: CD01MMDDYYXX (where MM=Month, DD=Day, YY=Year, and XX=your student number) to **Inspiron 3500.**



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

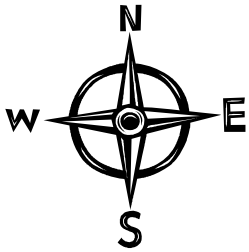
All changes will apply to the assets listed and all the updates must fall within your custodial area.

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

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

NAV: Mass Change

SF4.5



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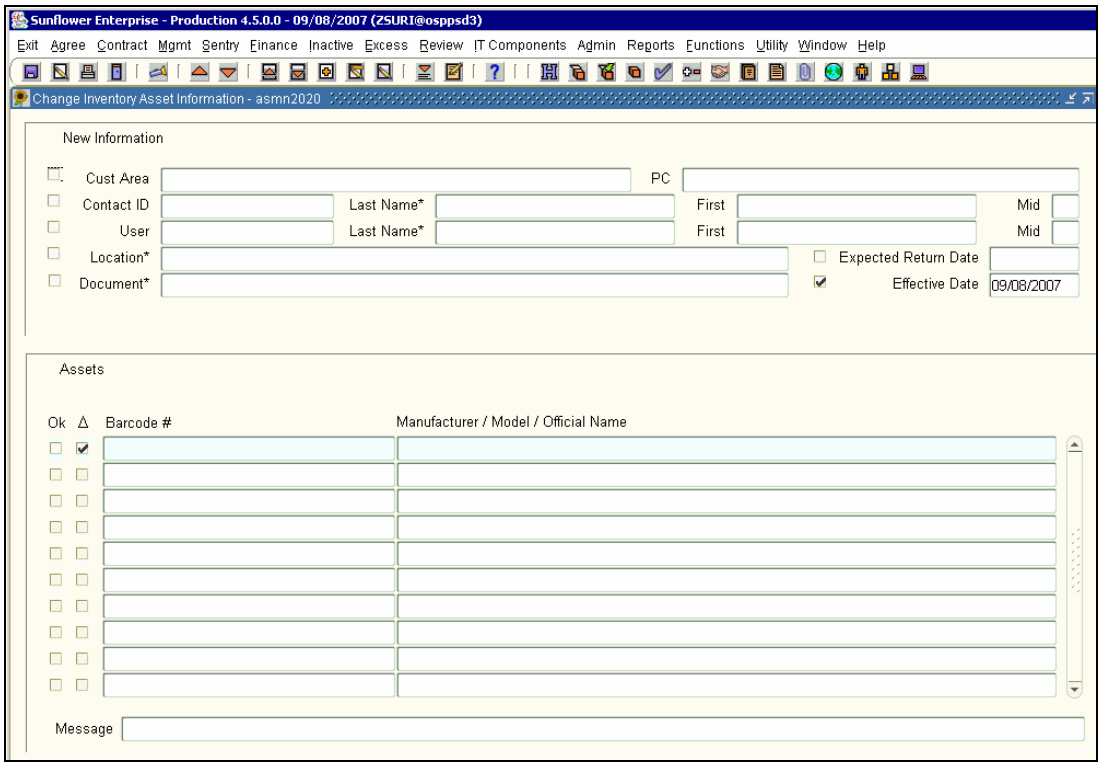
Mass Change

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

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



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

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

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

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

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

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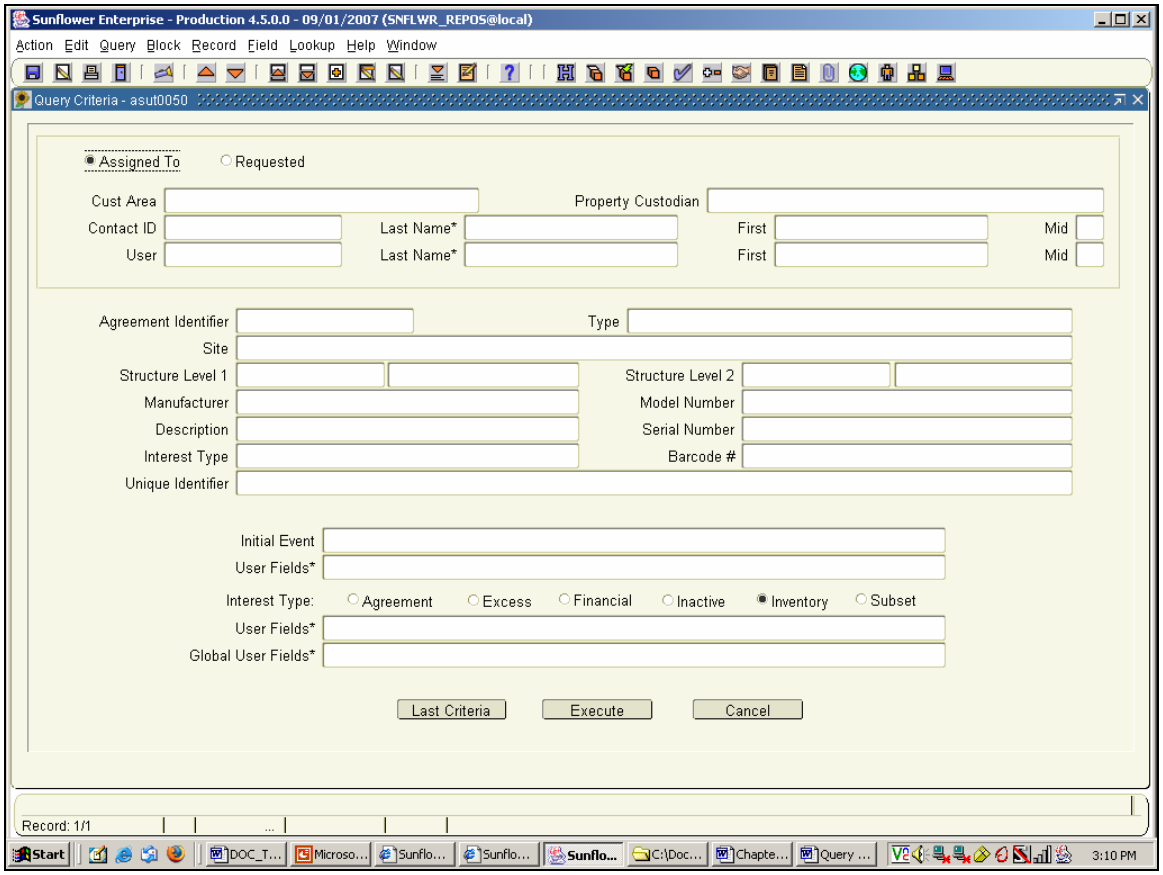
Goto task #7

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

<u>Result:</u> You are taken to the Query Criteria screen.



5. Search based on your specific criteria (e.g. if you want to update locations, query by location. To update a User, query by User, etc.)

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

<u>Result:</u> All assets with the criteria selected will display.

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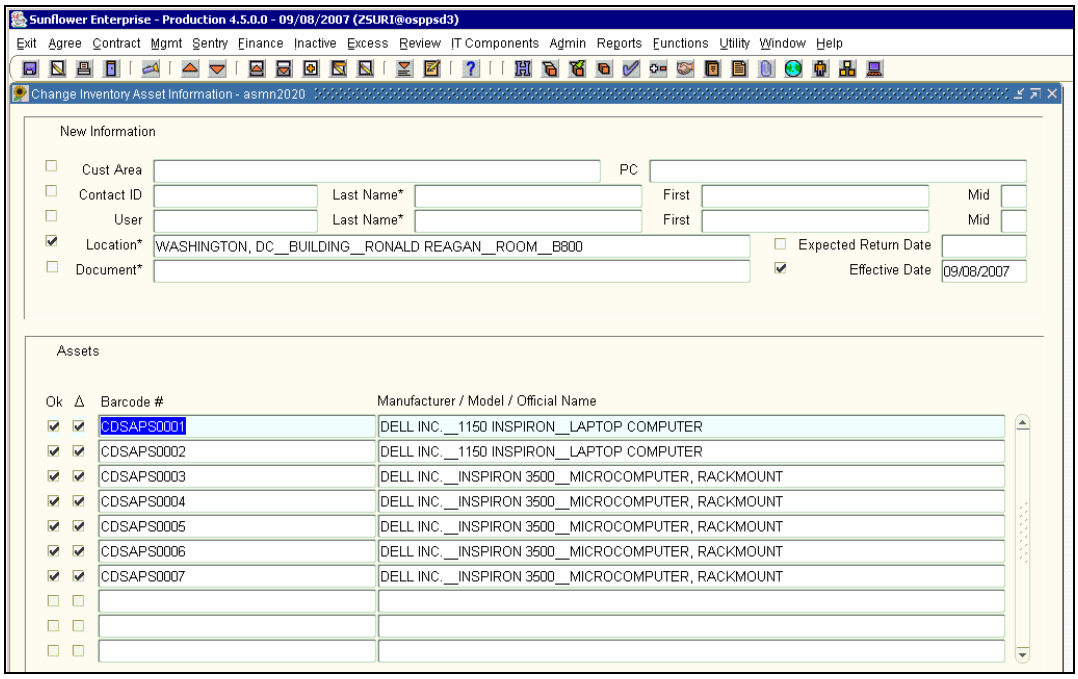
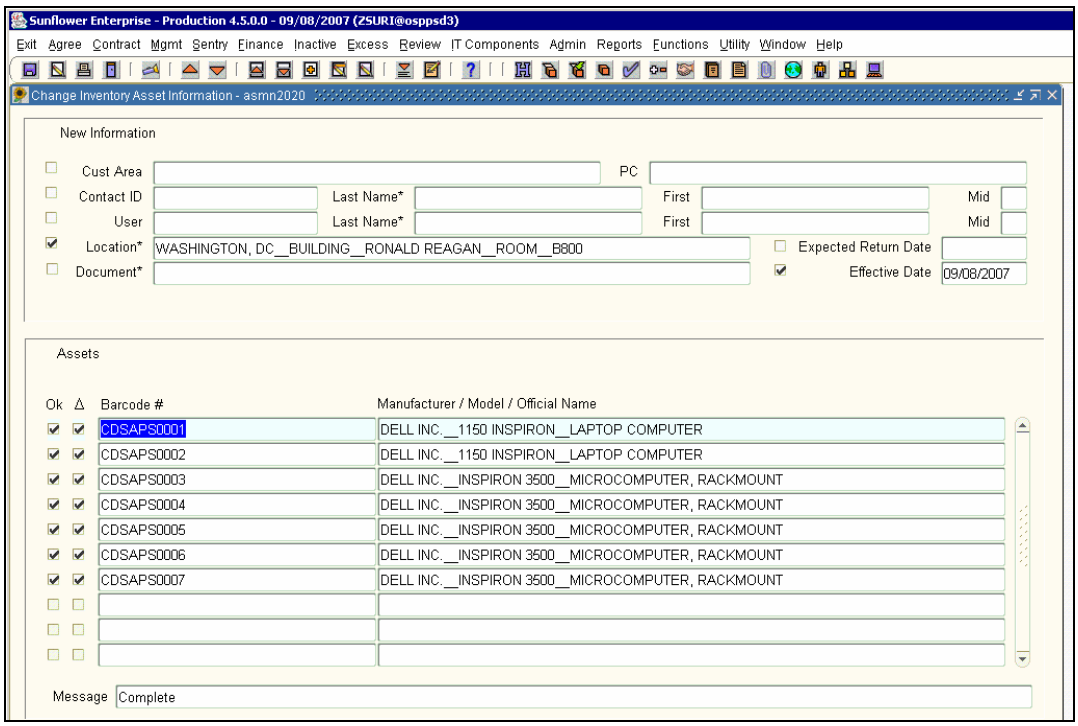


7. Select the **Save** button from the toolbar to save your work.

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

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



End of activity.

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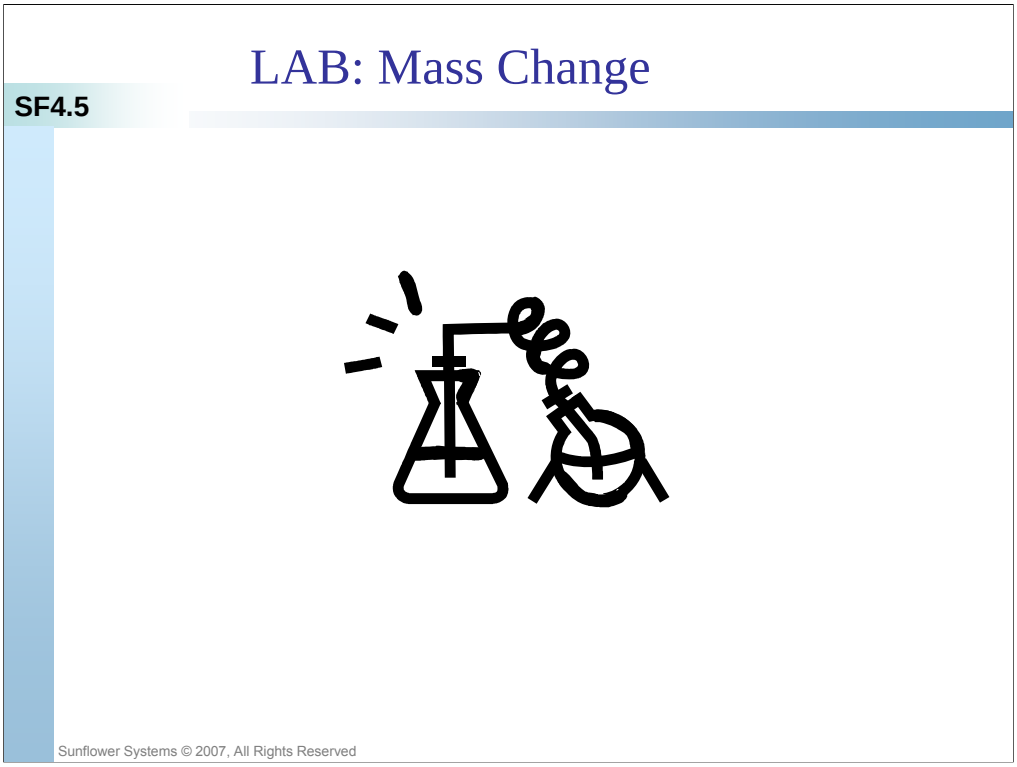
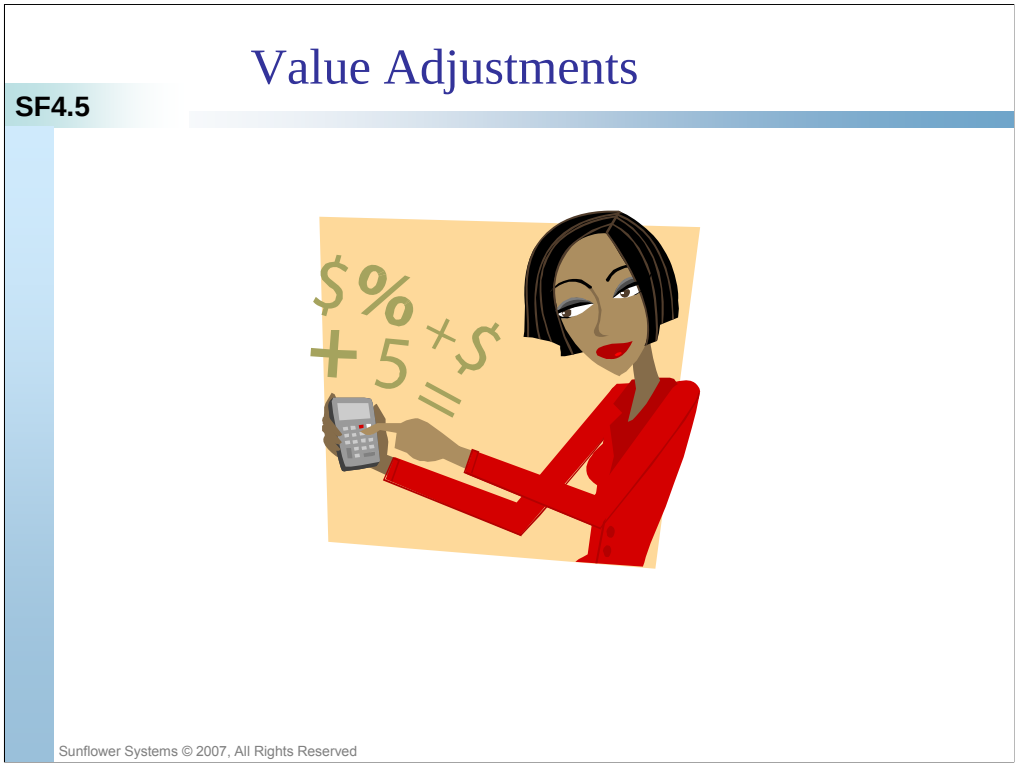
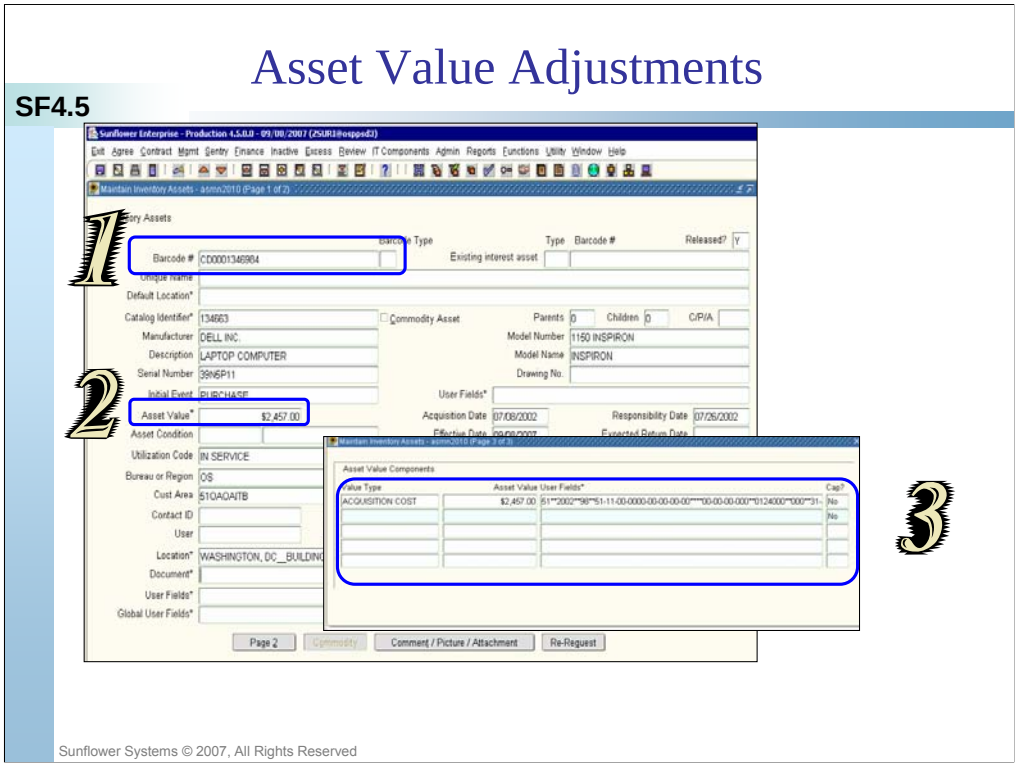


Update all the assets in your assigned Custodial Area for training (see your Login Information card) to the User field to you. Use the Last Name field to lookup your last name and select your last name, first name from the list.



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



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

Area 1 Enter the barcode number in this area.

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

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

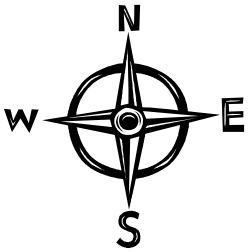
-The **Type** field allows you to choose the type of the adjustment from the LOV. (Acquisition Cost, Discount, Installation, Shipping, Trade-In)

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

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

NAV: Update Asset Value

SF4.5



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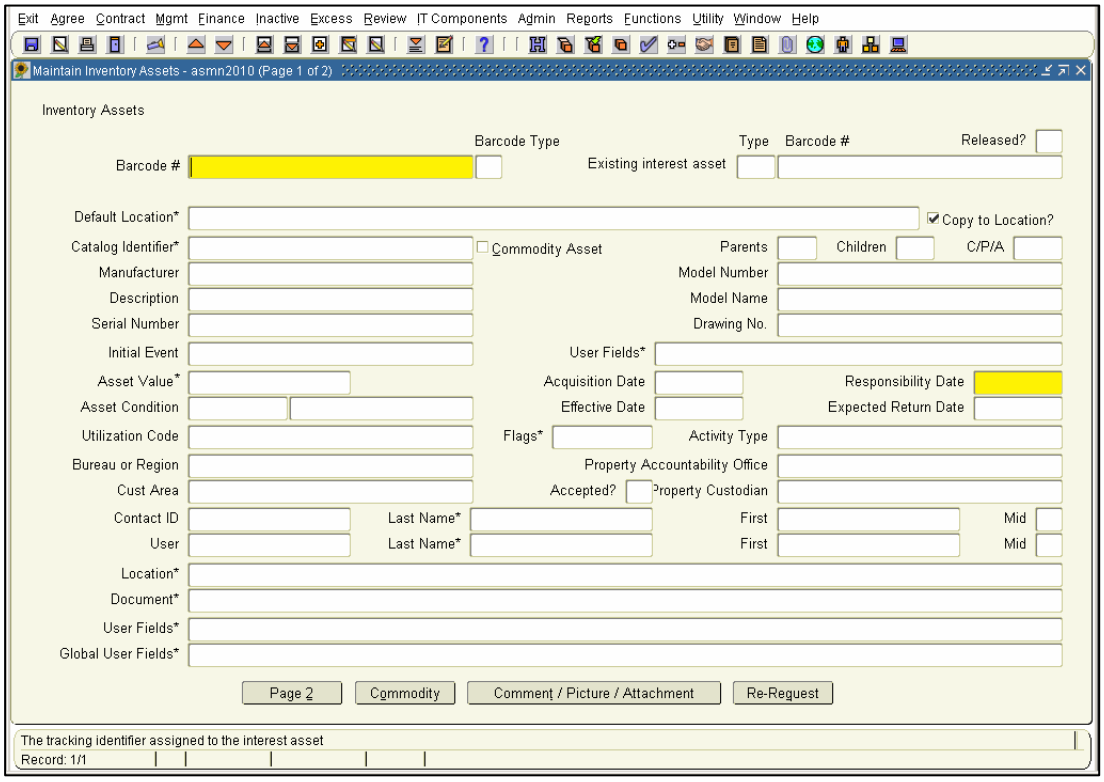
Update Asset Value

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



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

<u>Result:</u> The remainder of the property record auto-populates.

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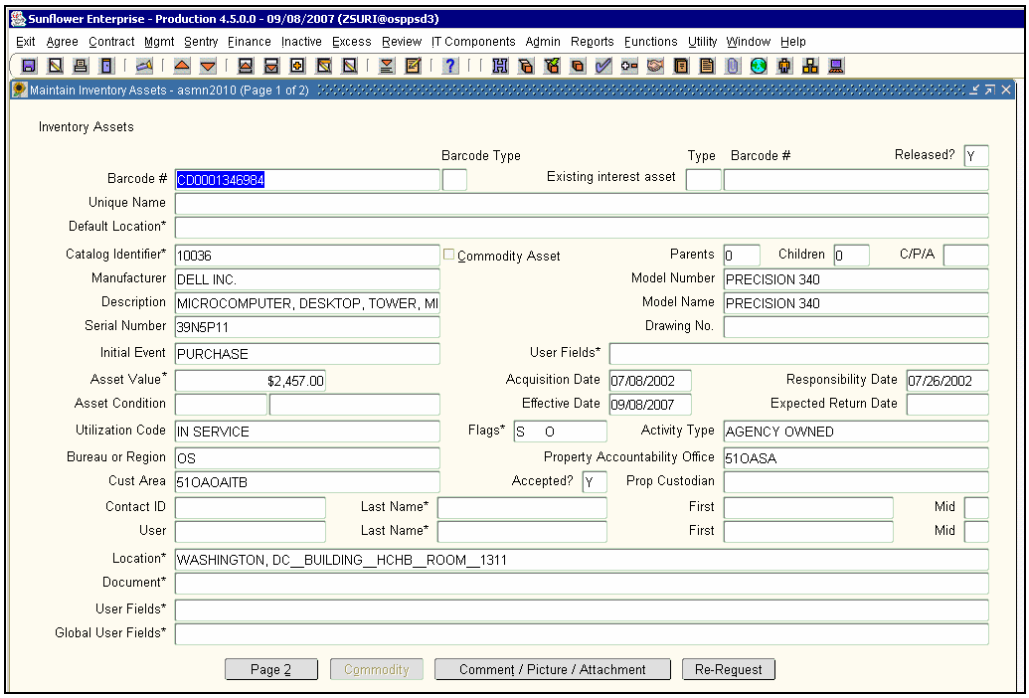
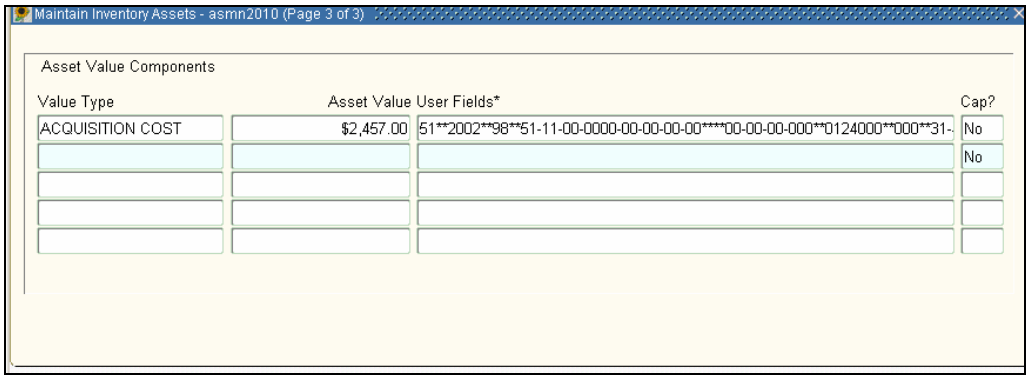


2. Double click the **Asset Value** field.

Result: The Asset Value complex field displays.



3. Select the next empty line.

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

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

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

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

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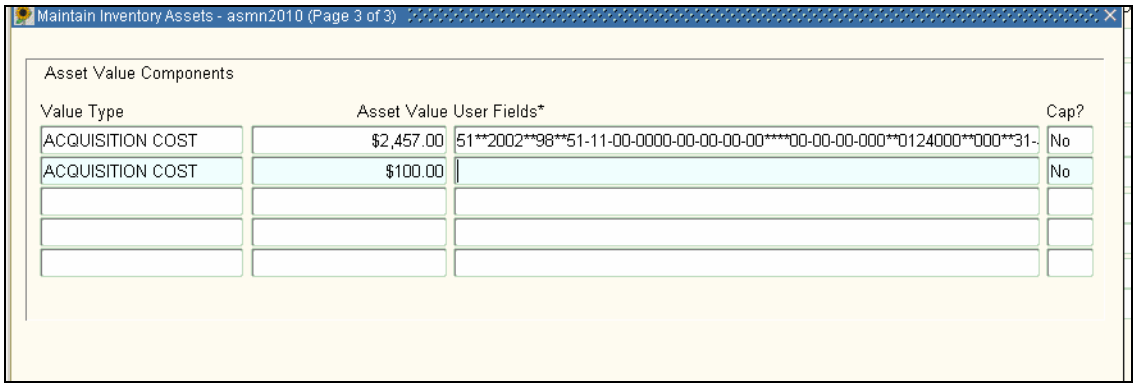
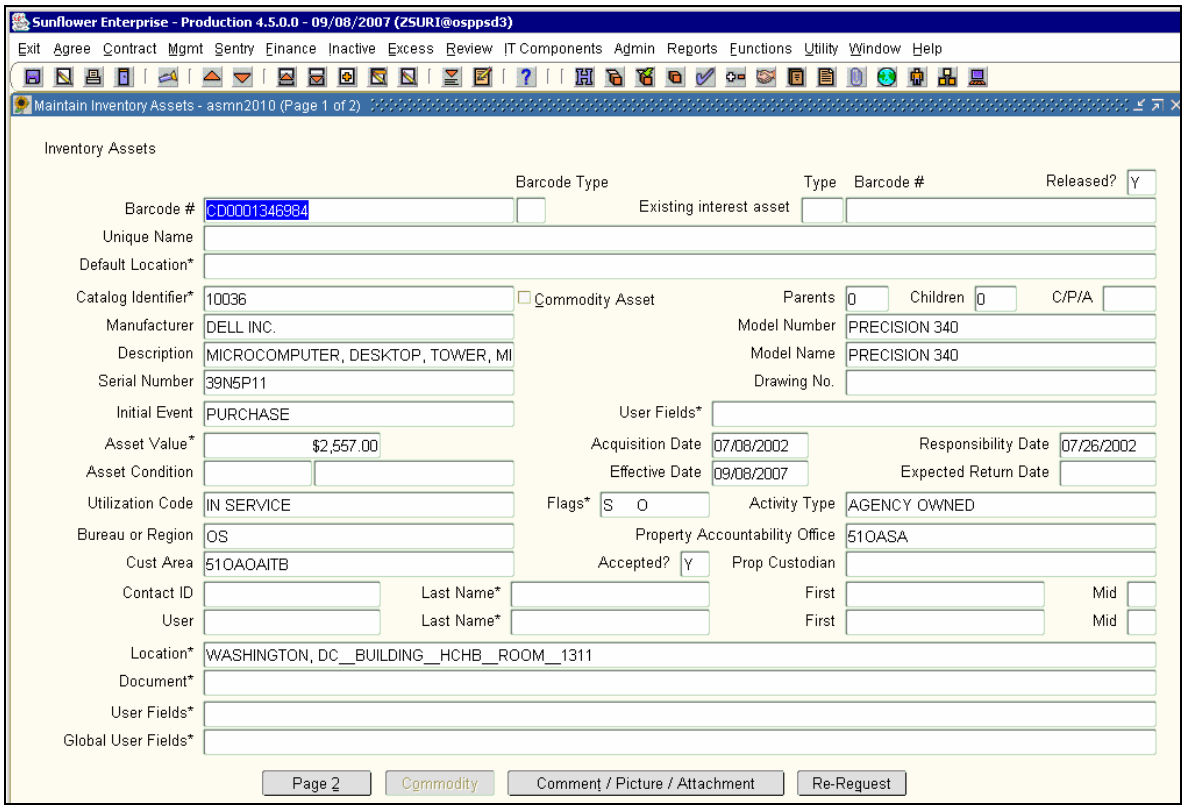


6. Select the **Save** button on the toolbar to save and close the asset value window.

7. Select the **Save** button on the toolbar to save the asset value update to the asset.

Result: The asset value is updated.



End of activity.

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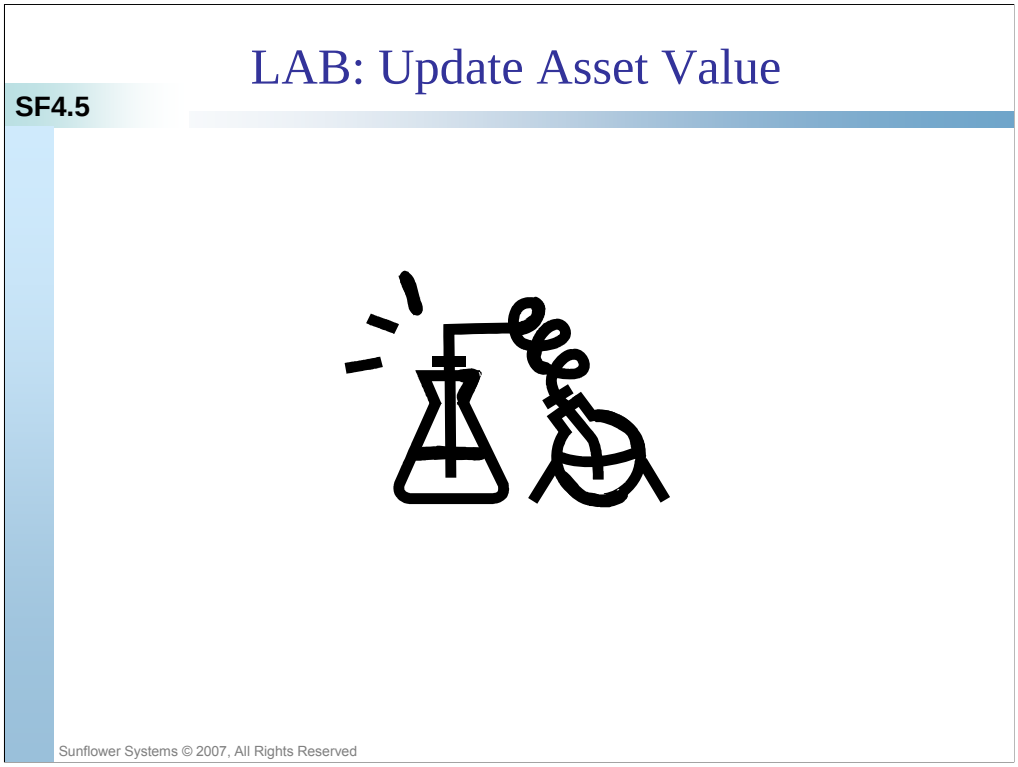

Update the asset value of the laptop you have created with Barcode # CD01MMDDYYXX (where MM=Month, DD=Day, YY=Year, and XX=your student number) and updated to Inspiron 3500. **Add $450 to its value.**

Lesson Summary

SF4.5

You should now be able to:

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

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SF4.5

Notes:

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SF4.5

Chapter 6:
Transfer Assets

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Lesson Objectives

SF4.5

After this lesson you should be able to:

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

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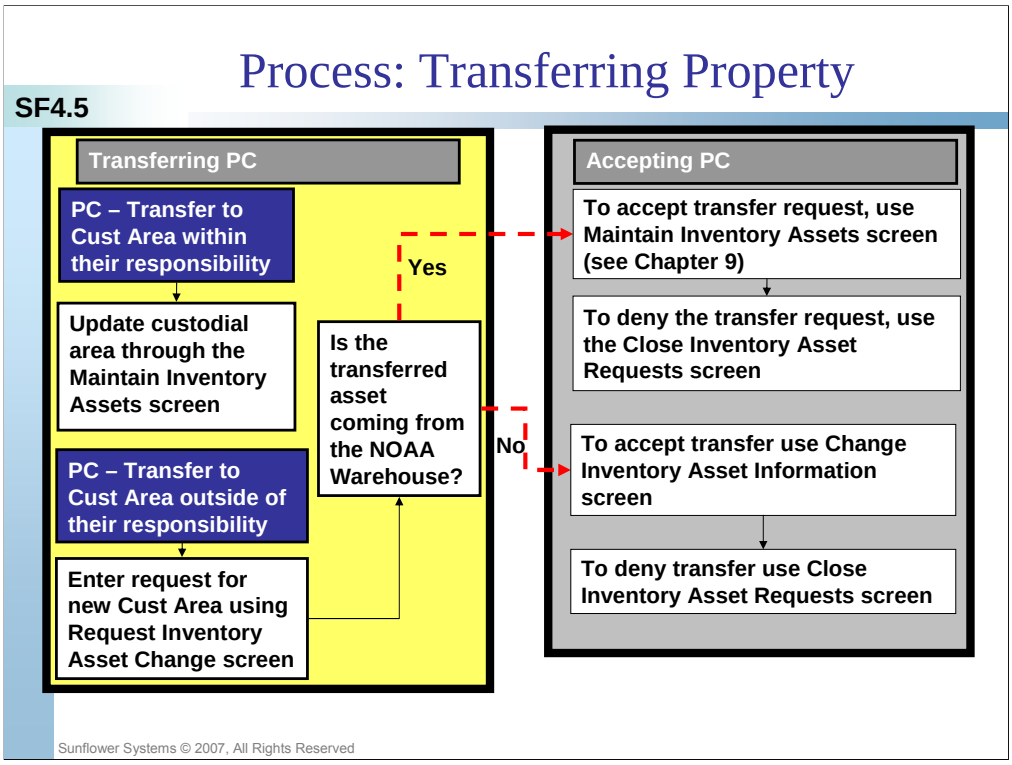
The Sunflower Property system provides the capability to:

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

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



Transfer tips:

Owning PC

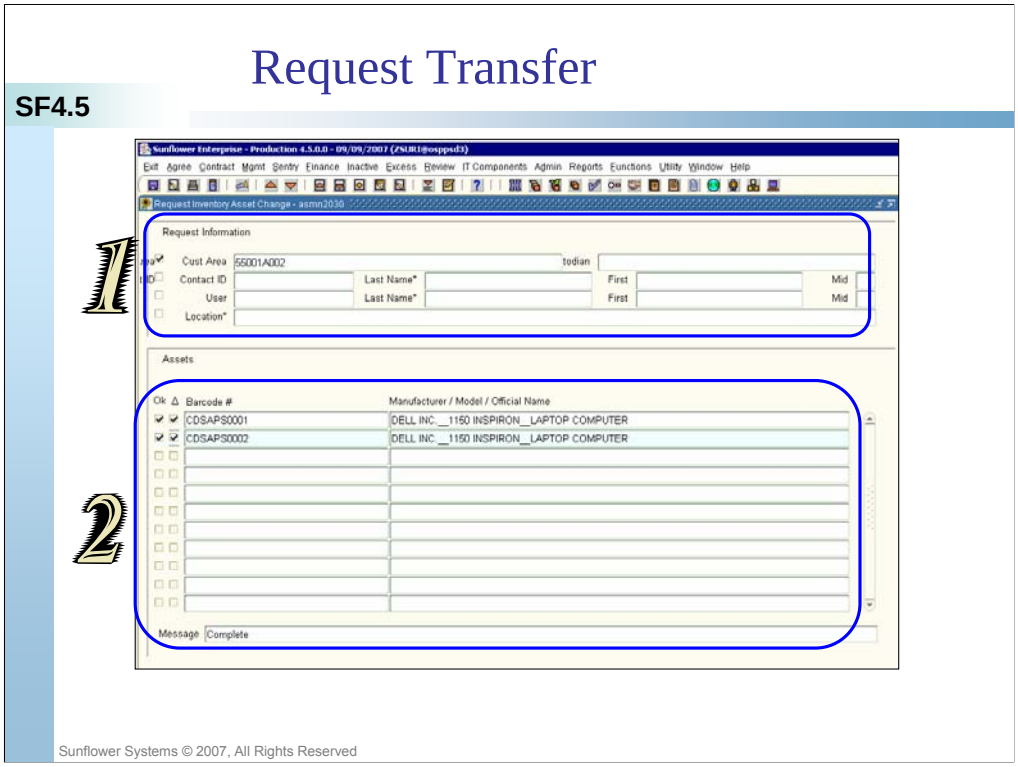
- If the owning PC is also the PC of the new custodial area, then the owning PC can update the custodial area on either the **Maintain Inventory Assets** screen or **Change Inventory Asset Information** screen.
- If the owning PC is *not* the PC of the new custodial area, then the PC enters a request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

Accepting PC

- The accepting PC decides whether or not to accept the transfer request.

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

Note 2: When requesting an asset that has been excessed the NOAA Warehouse will reinstate the asset and then use the transfer process to transfer the asset into your custody. Use the Maintain Inventory Asset screen to accept the transfer so that you may also change the Bureau information. See Chapter 9, Dispose (Excess) for the steps on accepting a transfer from outside your Bureau.



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

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

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

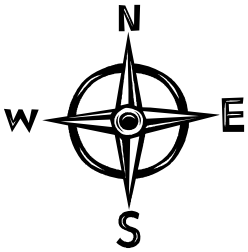
<u>Examples:</u>

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

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

NAV: Request Transfer

SF4.5



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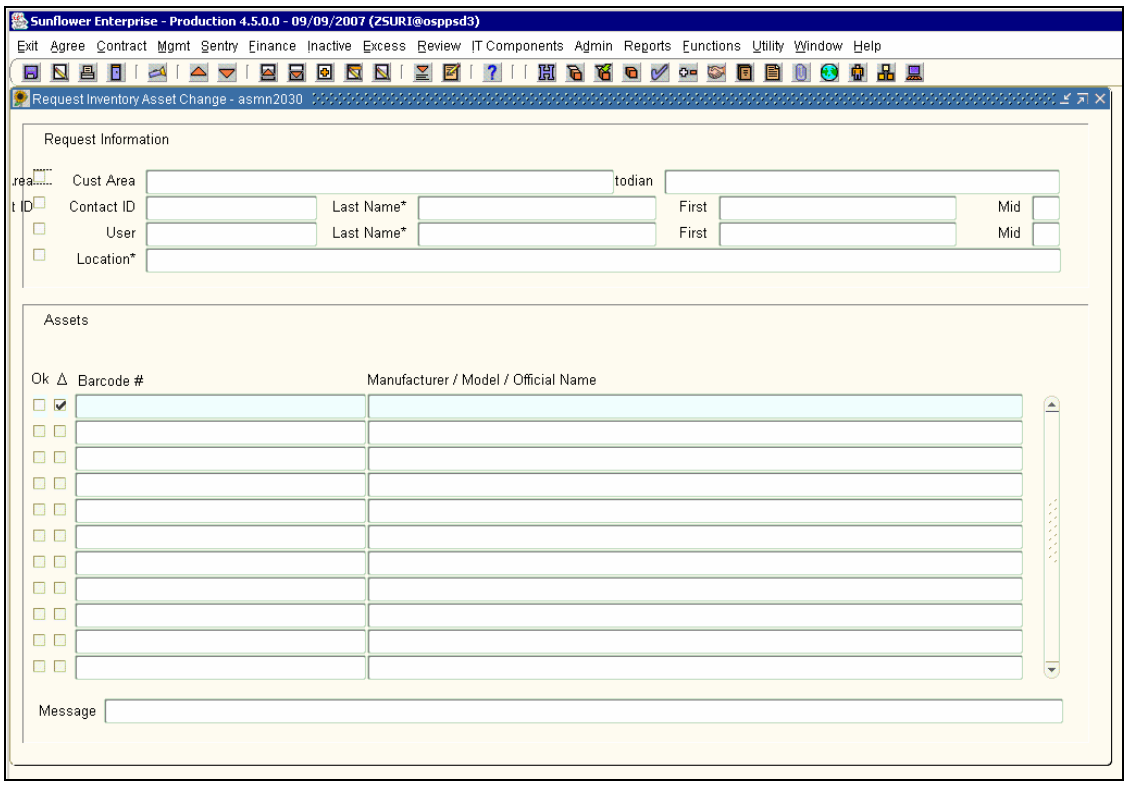
Request Transfer

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



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

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

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

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

2. Select the blue-highlighted **Barcode Number** field in the **Assets** portion of the screen.

3. Enter the barcode number of the property record to be changed, and then **Tab** out of the field.

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

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

4. Enter additional barcode numbers in the **Barcode Number** fields if more than one asset is being transferred to the same custodial area.

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

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

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

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

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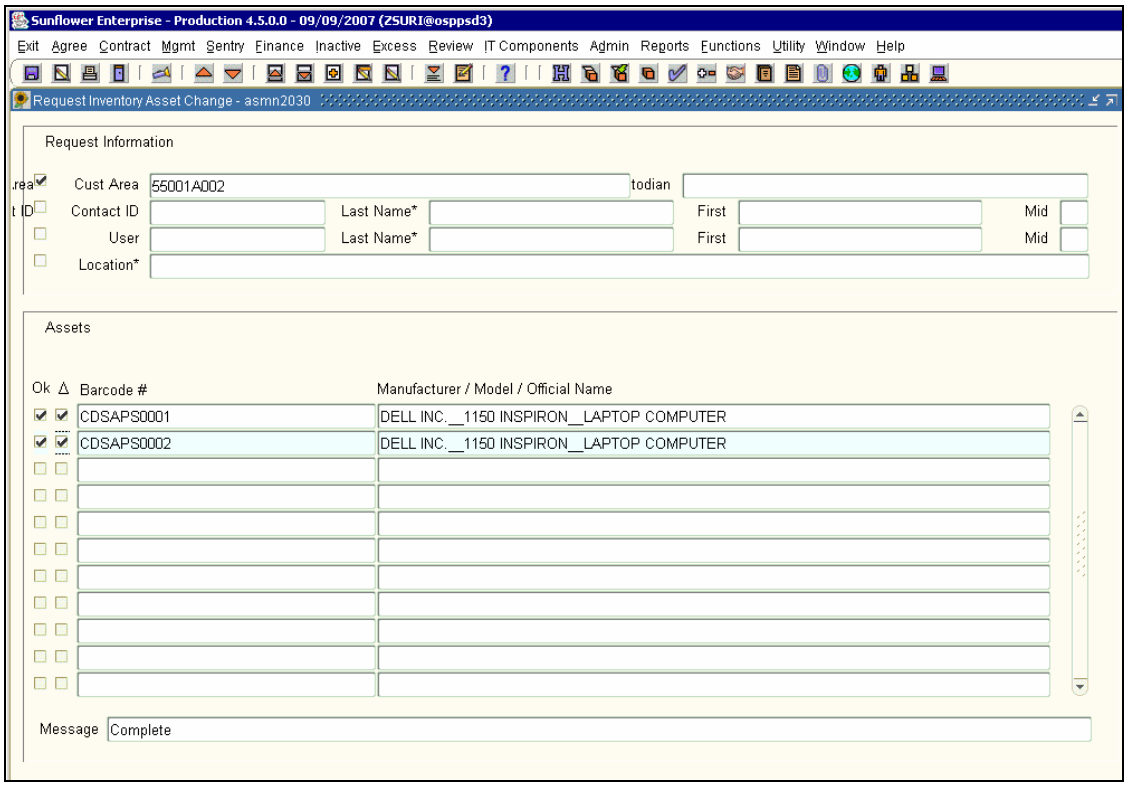

End of activity.

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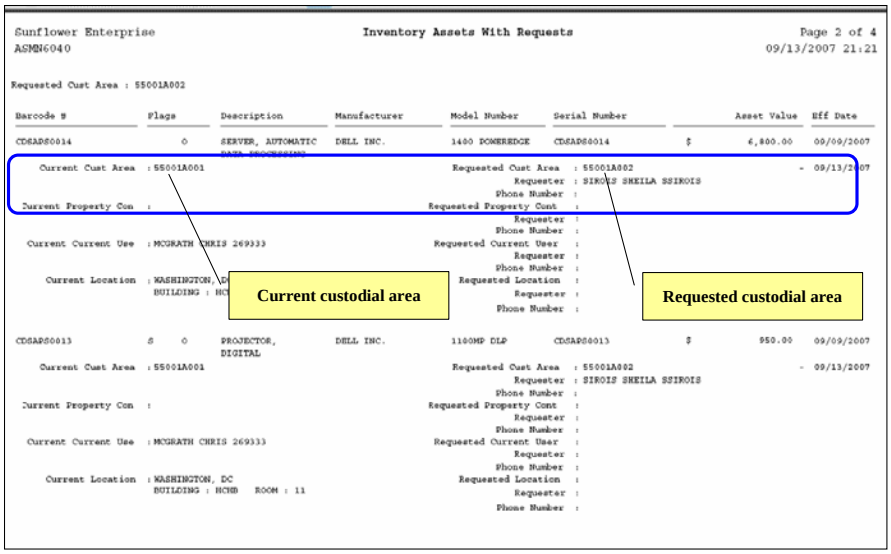
Inventory Assets With Requests Report

SF4.5



Sunflower Enterprise
ASMN6040

Inventory Assets With Requests

Page 2 of 4
09/13/2007 21:21

Requested Cust Area : 55001A002

Barcode #	Flags	Description	Manufacturer	Model Number	Serial Number		Asset Value	Eff Date
CDSAR60014	O	SERVER, AUTOMATIC DATA PROCESSING	DELL INC.	1400 POWEREDGE	CDSAR60014	$	6,800.00	09/09/2007
Current Cust Area : 55001A001				Requested Cust Area : 55001A002				- 09/13/2007
				Requester : SIROIS SHEILA SSIROIS				
				Phone Number :				
Current Property Con :				Requested Property Cont :				
				Requester :				
				Phone Number :				
Current Current Use : MCGRATH CHRIS 269333				Requested Current User :				
				Requester :				
				Phone Number :				
Current Location : WASHINGTON, DC				Requested Location :				
BUILDING : HCHB				Requester :				
				Phone Number :				
CDSAR60013	S O	PROJECTOR, DIGITAL	DELL INC.	1100MP DLP	CDSAR60013	$	950.00	09/09/2007
Current Cust Area : 55001A001				Requested Cust Area : 55001A002				- 09/13/2007
				Requester : SIROIS SHEILA SSIROIS				
				Phone Number :				
Current Property Con :				Requested Property Cont :				
				Requester :				
				Phone Number :				
Current Current Use : MCGRATH CHRIS 269333				Requested Current User :				
				Requester :				
				Phone Number :				
Current Location : WASHINGTON, DC				Requested Location :				
BUILDING : HCHB ROOM : 11				Requester :				
				Phone Number :				

Current custodial area

Requested custodial area

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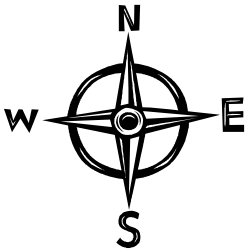
To determine whether or not there are any open requests for transfer to your custodial area, run the **Inventory Assets With Requests** report.

NAV: Generate Report for Inventory Assets with Requests

SF4.5



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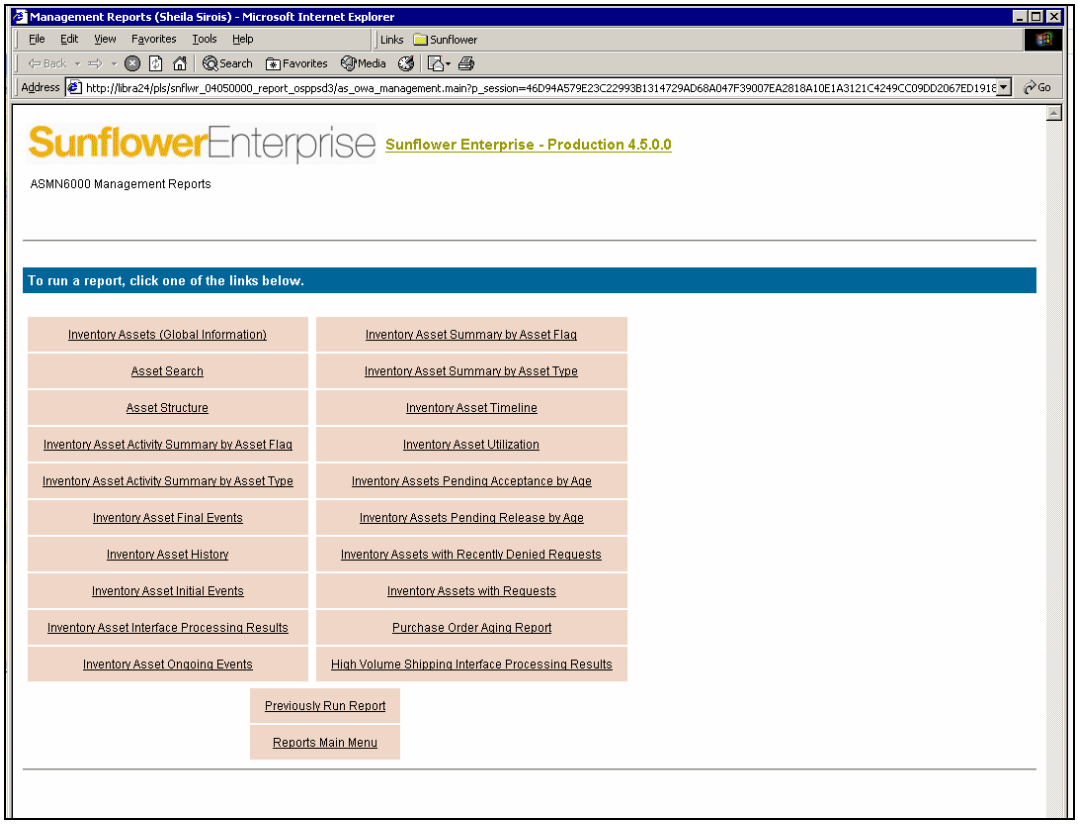
Generate Report for Inventory Assets with Requests

Inventory Clerk
M > Mgmt > Management Reports
Management Reports



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

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

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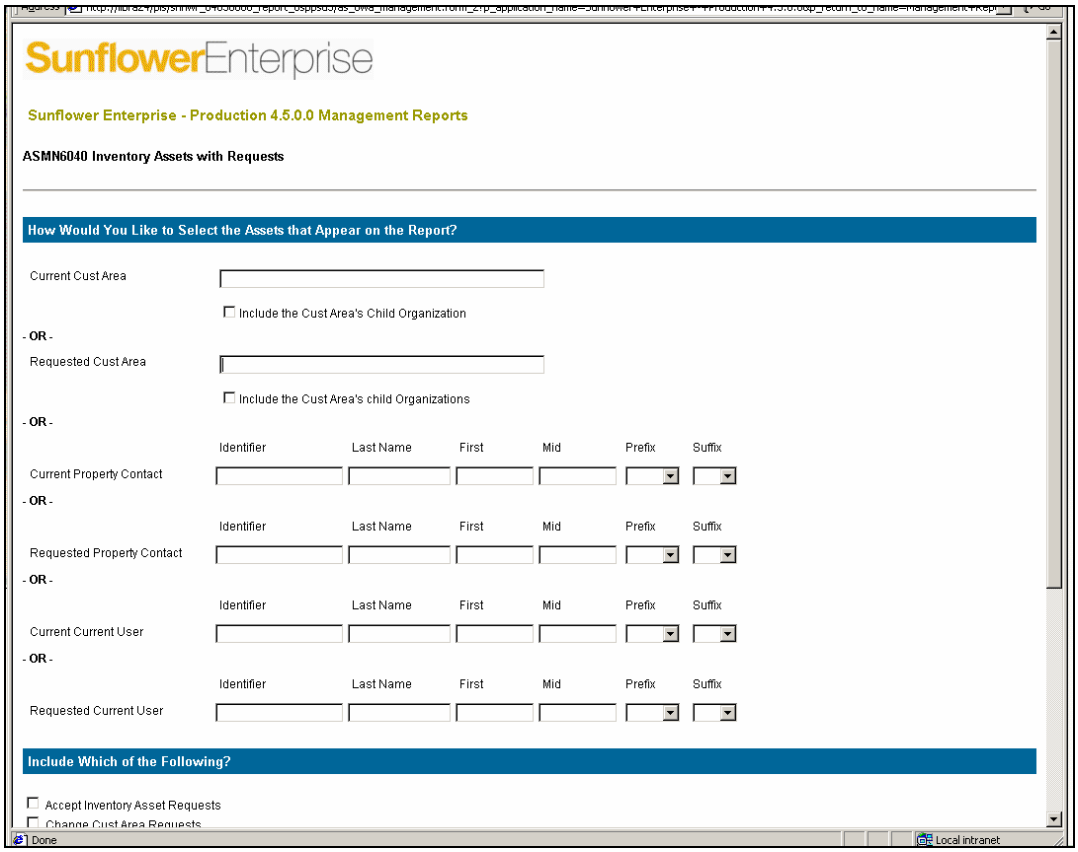

2. Enter your Custodial Area in the **Requested Cust Area** field to view all assets being transferred to you.

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

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

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

4. Sort as needed.

5. Select the **Submit** button.

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

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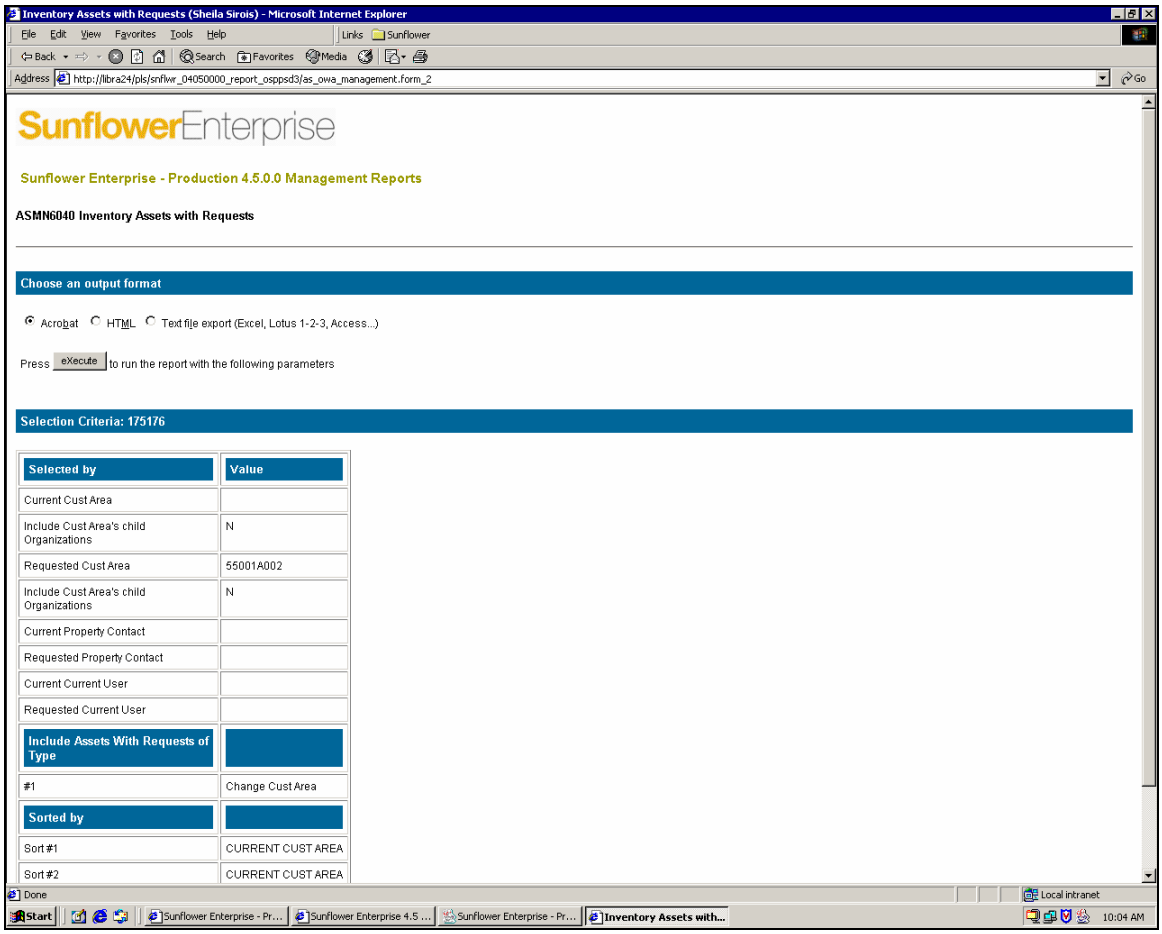

6. Select the **Acrobat** radio button.

7. Review your parameters and select the **eXecute** button.

Result: A report is opened in a separate window.

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Sunflower Enterprise — **Inventory Assets With Requests** — Page 2 of 3
ASMN6040 — 09/09/2007 10:06

Requested Cust Area : 55001A002

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

End of activity.

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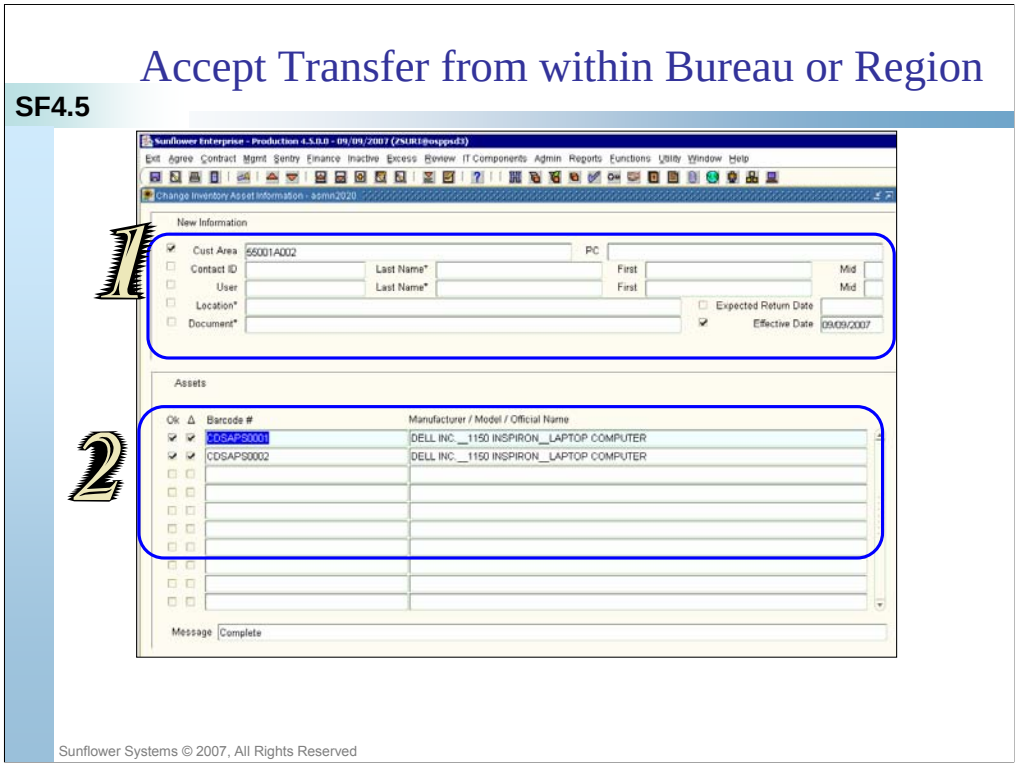


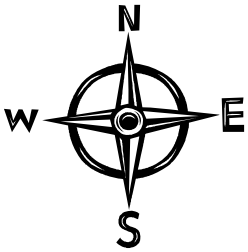
The **Change Inventory Asset Information** screen is used to accept transfer requests within the same Bureau or Region.

Area 1 Enter the new information to be applied to the assets being transferred into your area.

Area 2 List the barcode numbers of all the assets that you are accepting transferred into your area. If more are entered than you wish to accept at this time, uncheck the “Change” column (the delta) next to the barcode number for the asset you do not wish to accept.

NAV: Accept Transfer within Bureau or Region

SF4.5



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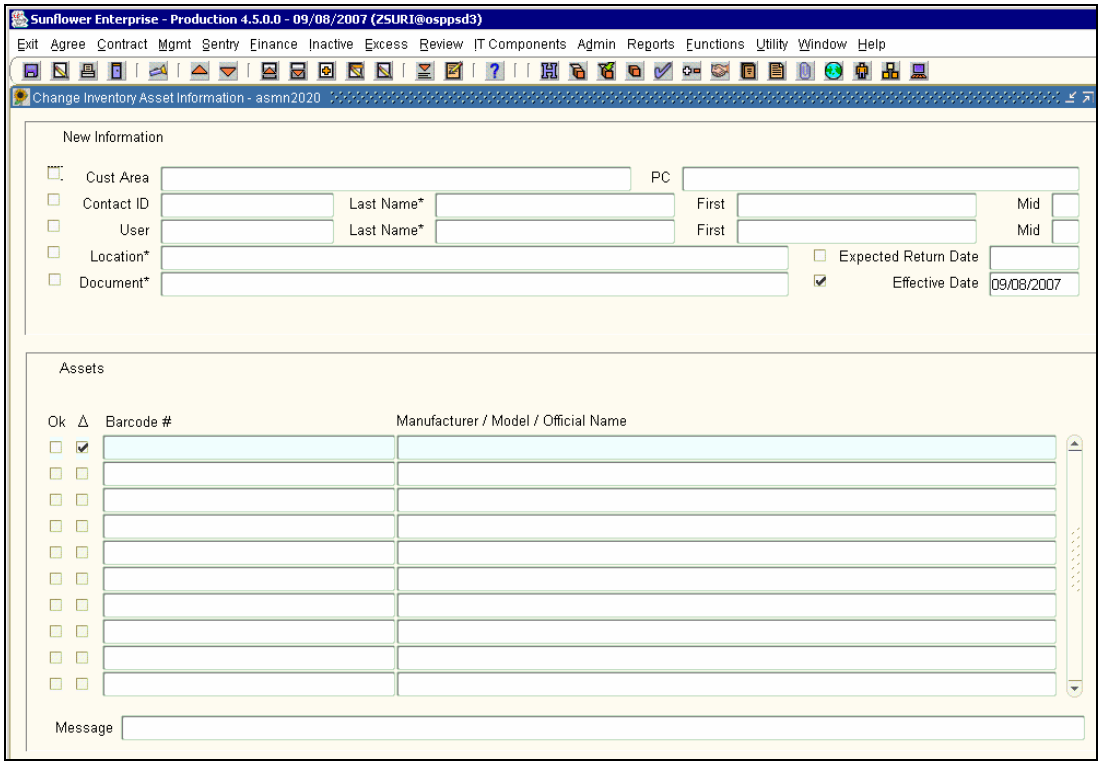
Accept Transfer within Bureau or Region

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



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

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

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

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

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

Goto task #9

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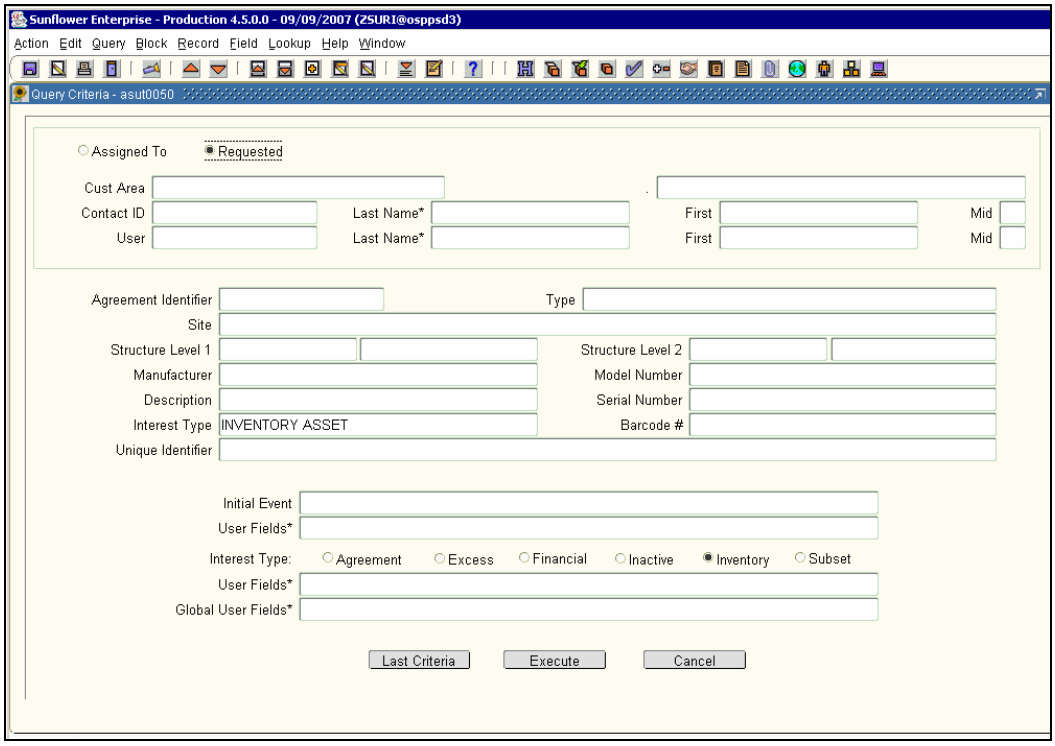
4. Select the **Find** button from the toolbar.

Result: You are taken to the Query Criteria screen.



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

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

6. Enter the Custodial Area for the PC receiving the asset(s) in the **Cust Area** field.

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

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

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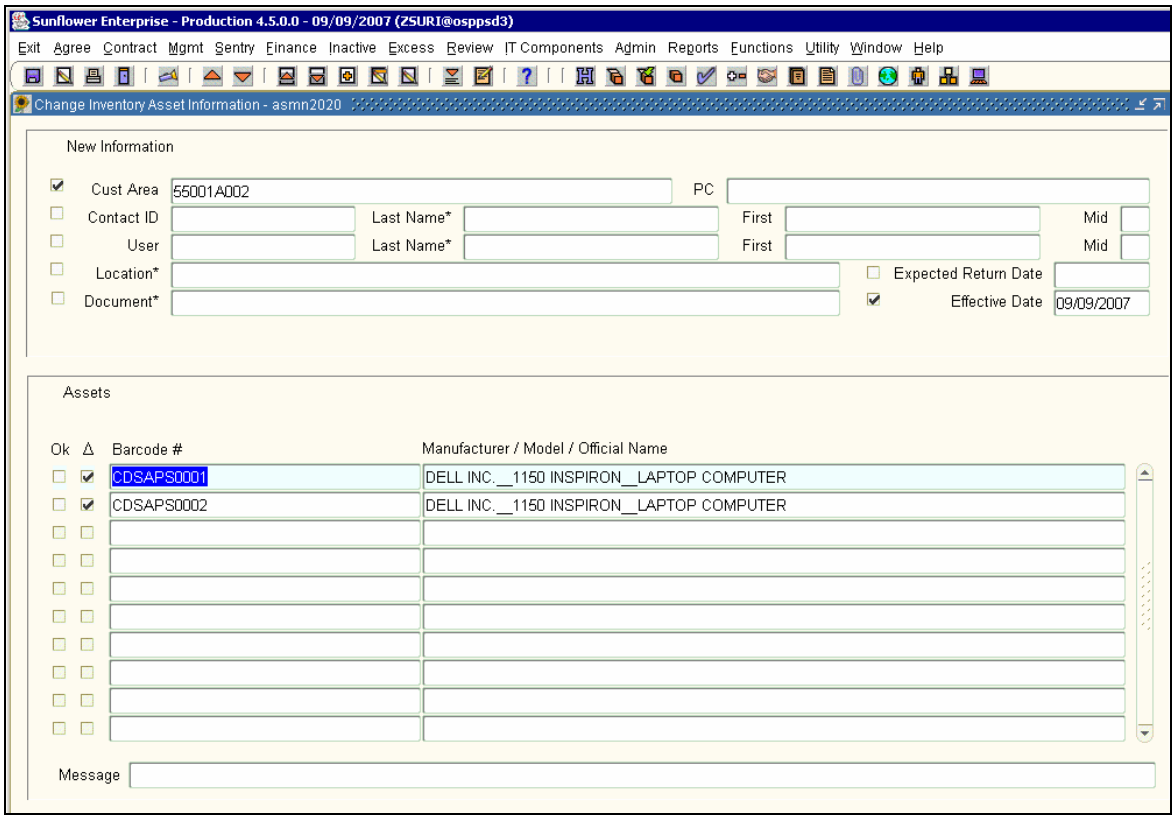

8. Uncheck any assets you do not want transferred.

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

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

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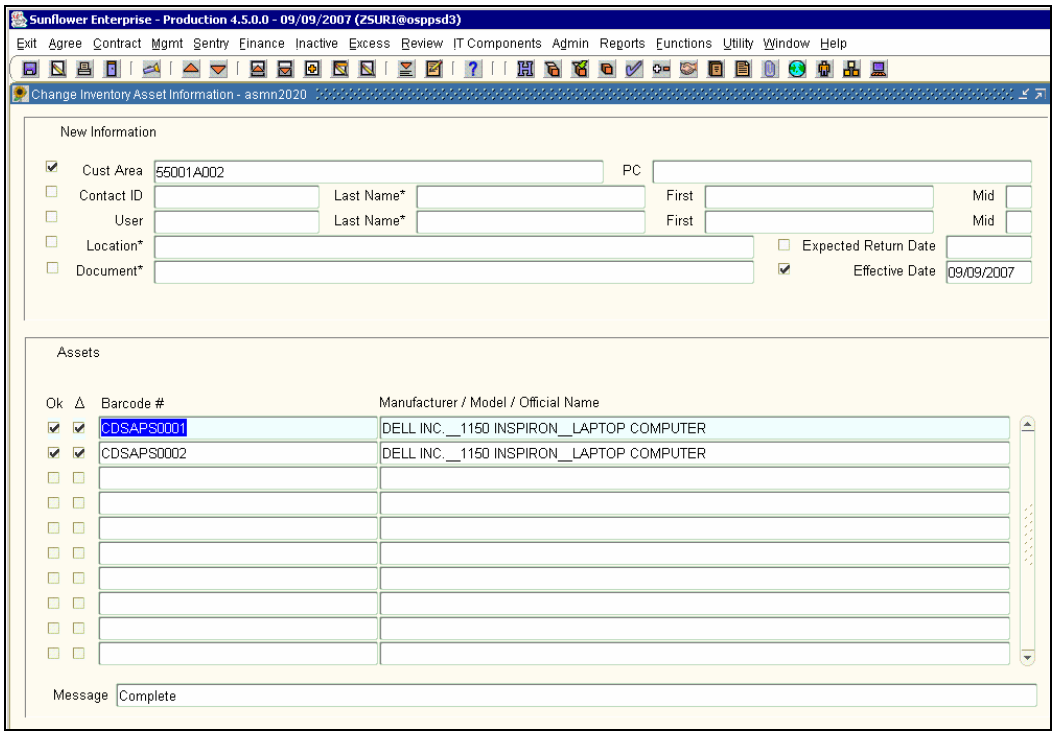

End of activity.

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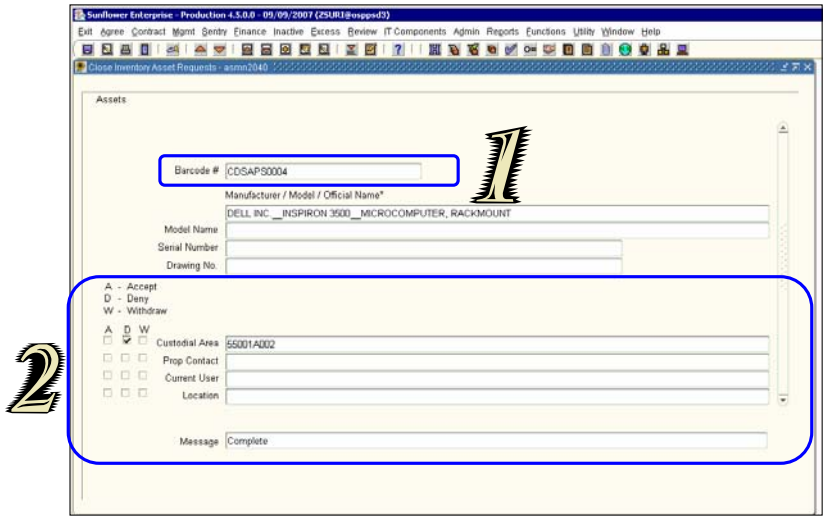
Withdraw or Deny Transfer

SF4.5



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

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

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

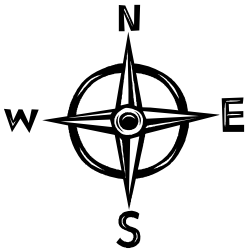
Note 1: You may only withdraw transfers you have initiated.

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

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

NAV: Withdraw or Deny Transfer Request

SF4.5



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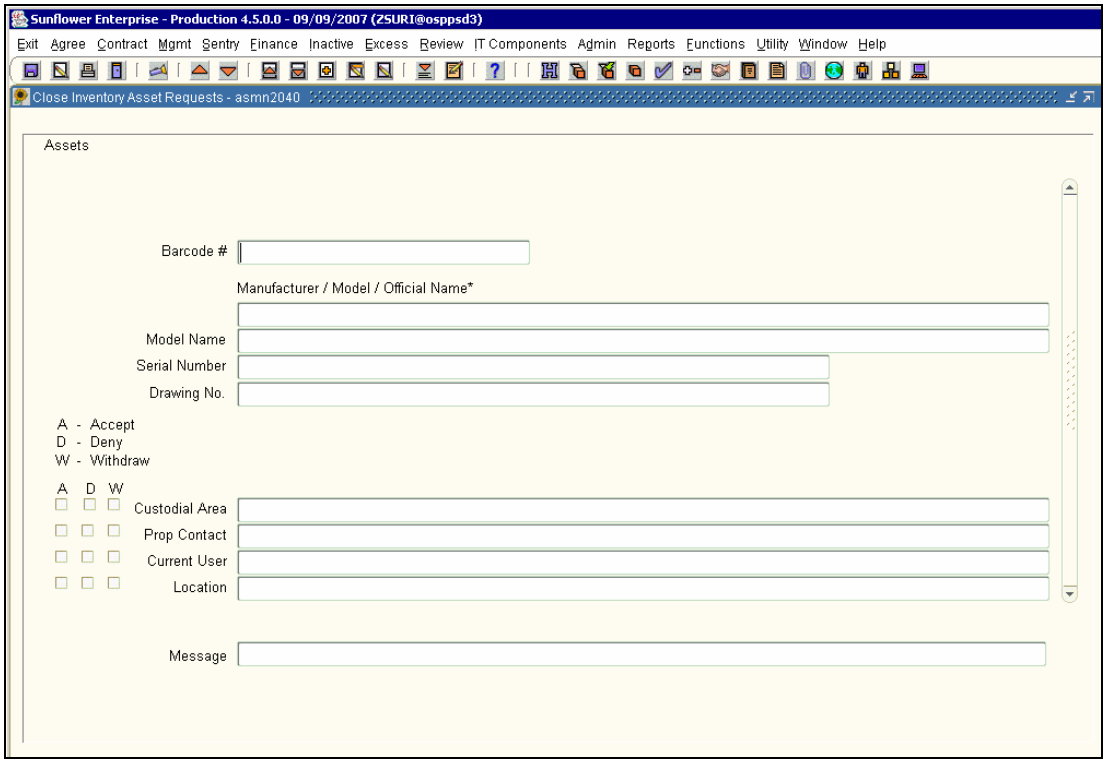
Withdraw or Deny Transfer

Inventory Clerk M > Mgmt > Close Inventory Asset Requests Close Inventory Asset Requests



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

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

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

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

   Select:
   - **D** to Deny
   - **W** toWithdraw

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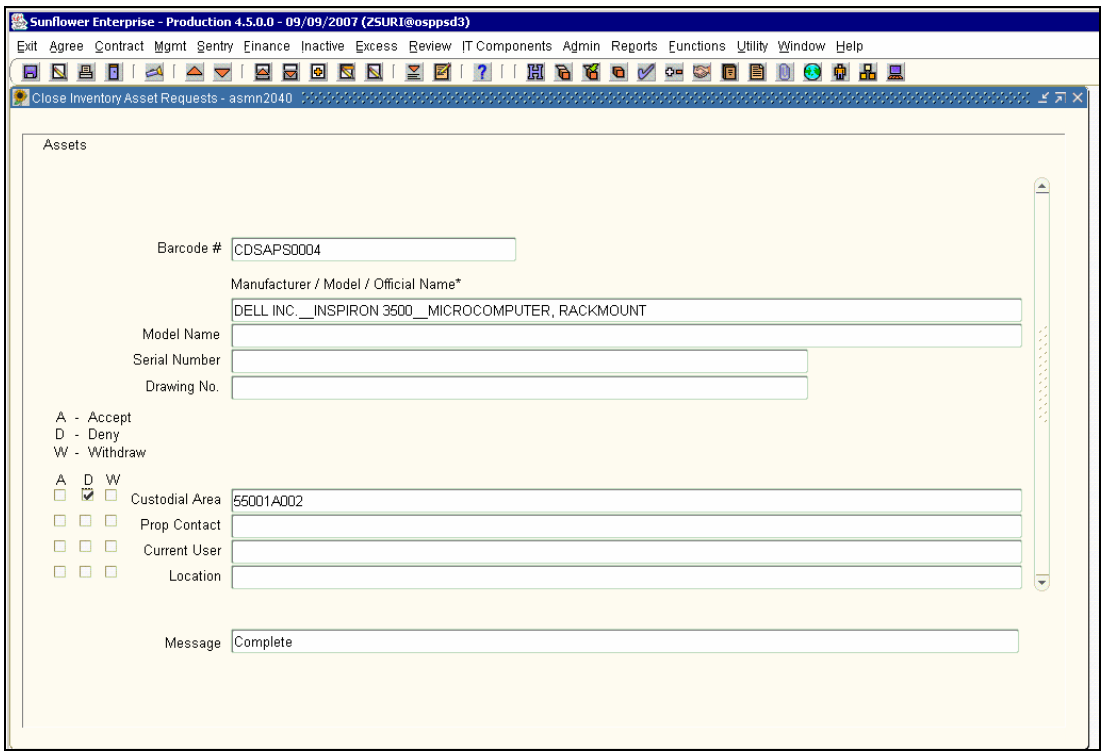
Field	Description
Custodial Area	The applicable custodial area for the PC receiving the asset.
Property Contact	The name of the new property contact.
User	The name of the new user.
Location	Select this field to launch the **Location** sub-form.

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

Result: The transfer request is withdrawn/ denied.

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



End of activity.

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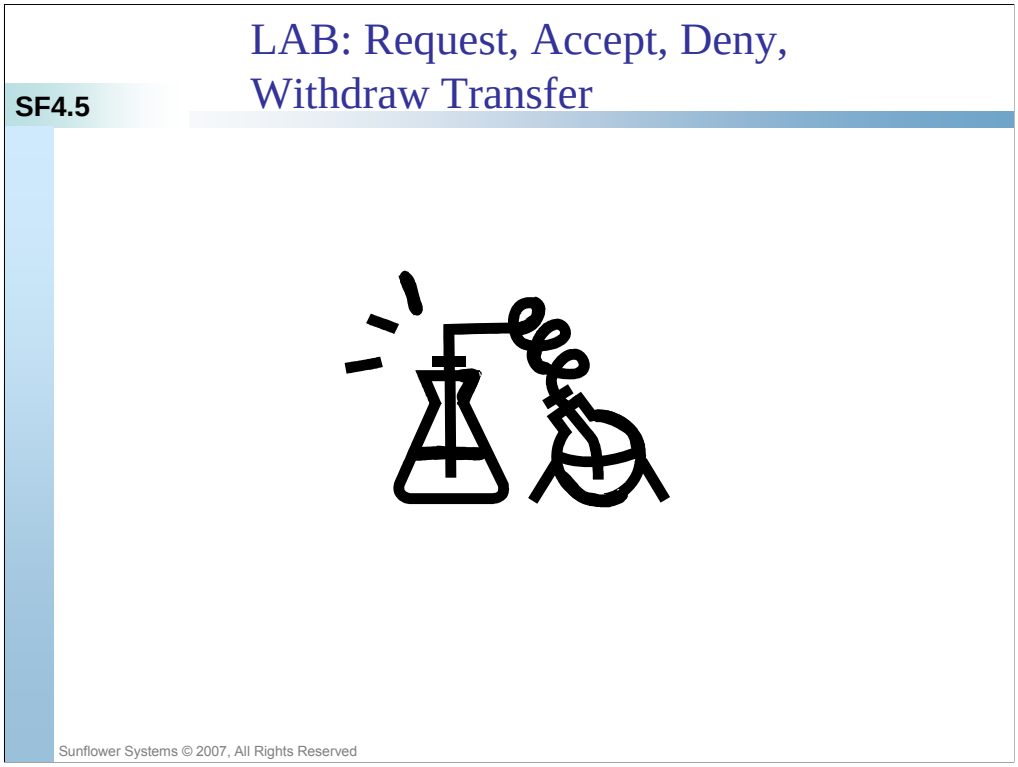

Lab #1: Transfer your Inspiron Laptop Barcode # CD01MMDDYYXX (where MM=Month, DD=Day, YY=Year, and XX=your student number) to the custodial area 55002A013.

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

Barcode #1:_____

Barcode #2:_____

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

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

Lesson Summary

SF4.5

You should now be able to:

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

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Notes:

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Chapter 7:

Manage a Review Campaign (PMO and PAO)

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SF4.5

Lesson Objectives

After this lesson you should be able to:

- Define Roles involved in a review campaign
- Set up a review campaign
- Use MobileTrak to upload data to scanners
- Use MobileTrak to download data to Sunflower
- Run reports to review campaign details and status
- Close a review campaign

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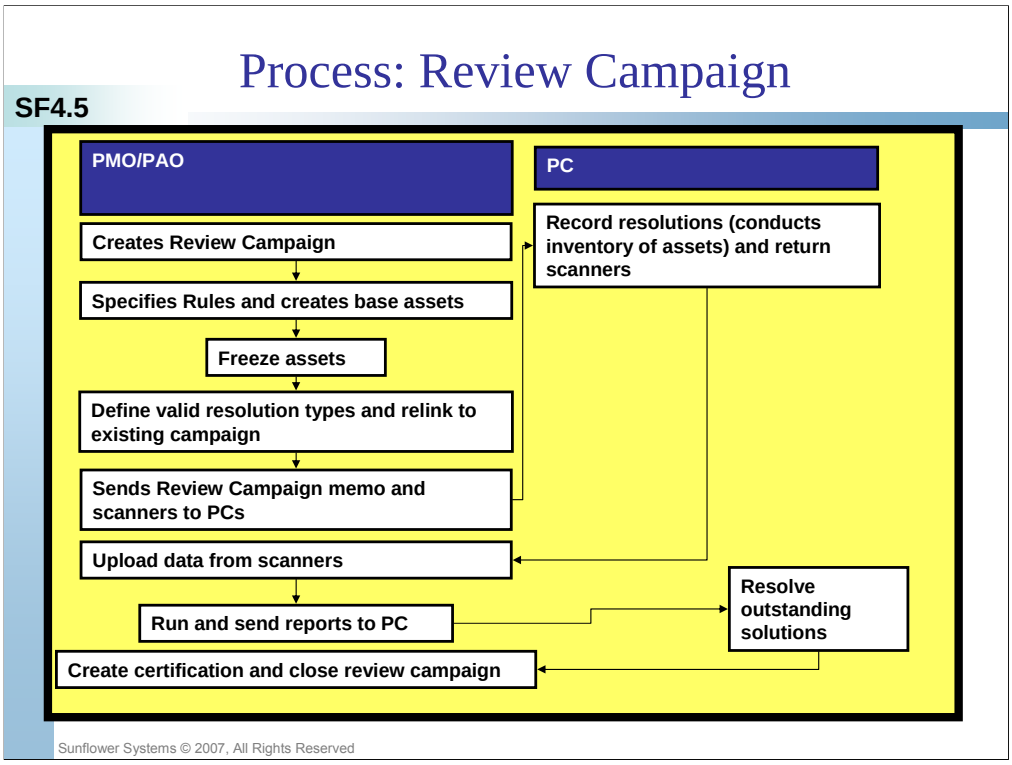
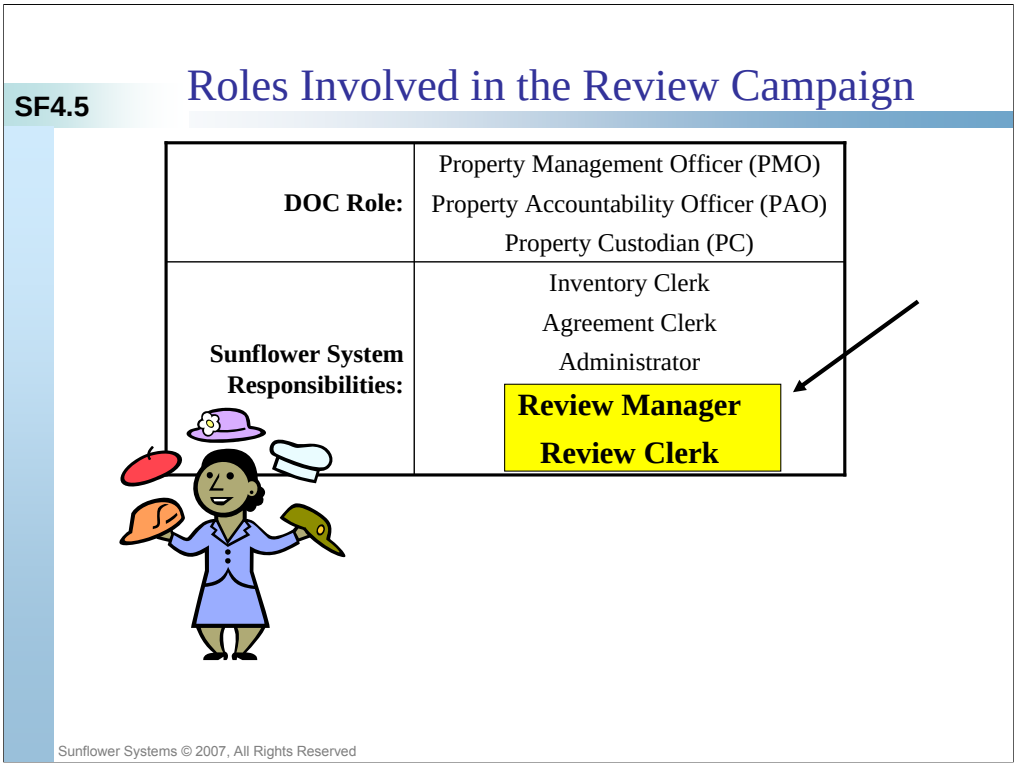


This chapter focuses on the role of the **PMO** and **PAO** during the review campaign.

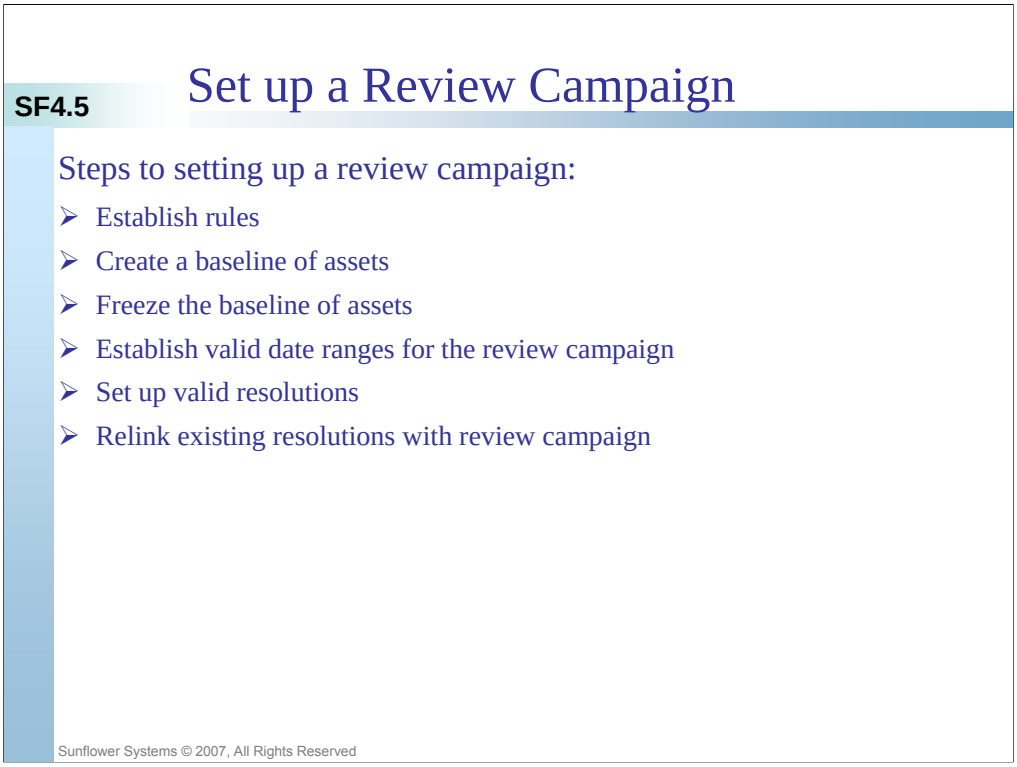


PMOs will be set up as Review Managers and PAOs and PCs will be set up as Review Clerks.

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

- Create
- Manage
- Close

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



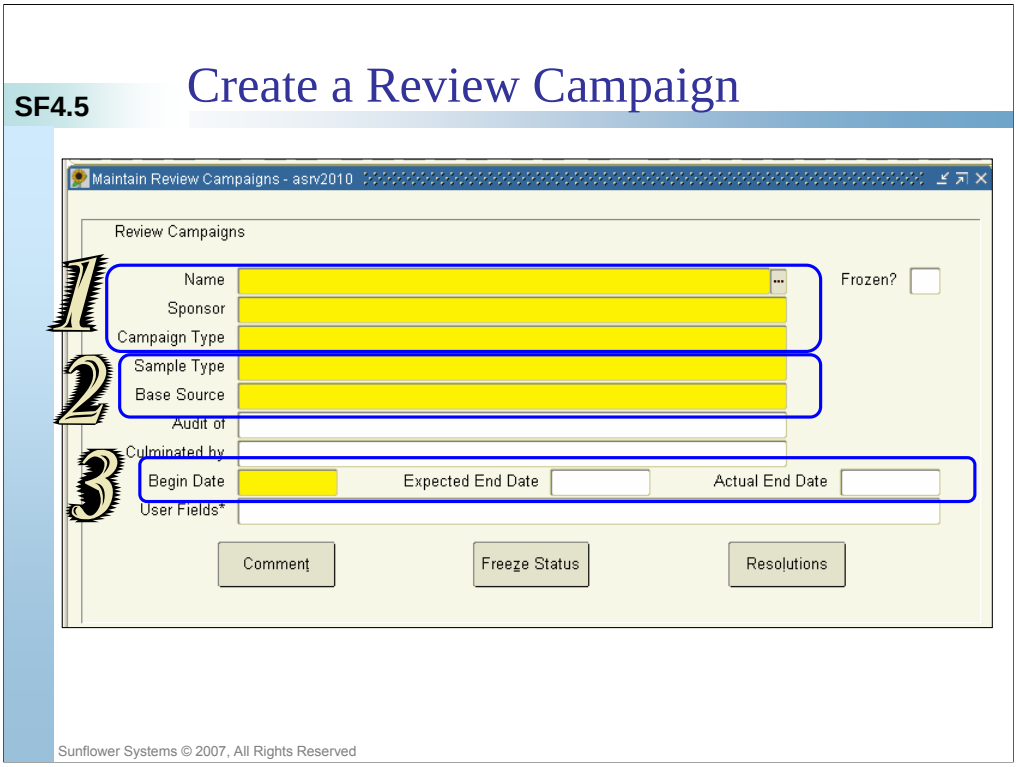
The PMO/PAO creates the review campaign in Sunflower.

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

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

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

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



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

Area 2:

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

Area 3:

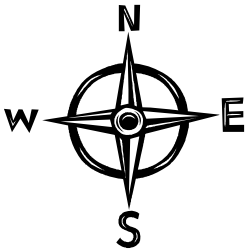
- The **Begin Date** is the start of the review campaign. This can be the date it is being entered or a date in the future.
- The **Expected End Date** is the date the review campaign is scheduled to end.
- The **Actual End Date** is the date the review campaign ends. Leave blank until the review cycle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

Best Practices Recommendation:

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

NAV: Create a Review Campaign

SF4.5



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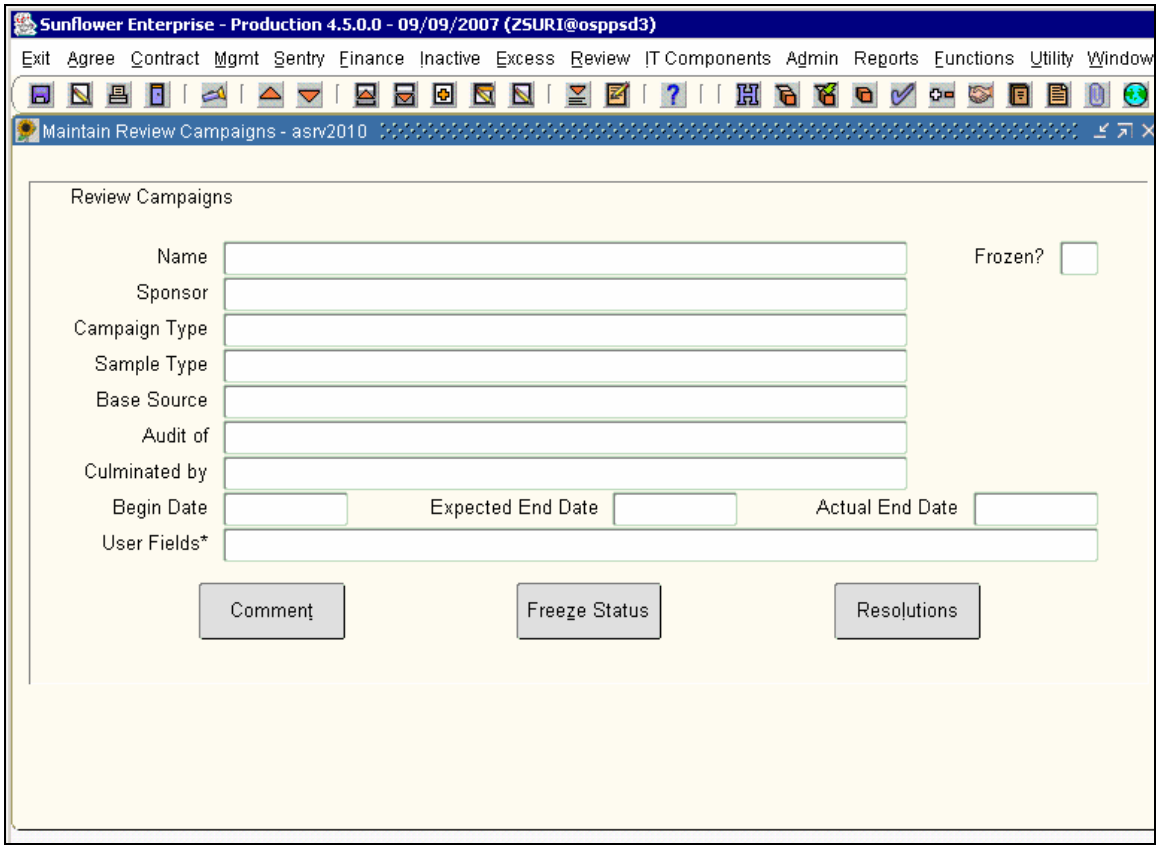
Create a Review Campaign

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



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

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

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

Note: Select the Bureau or Region Name.

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

4. In the **Sample Type** field, use the LOV to select **Population**.

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5. In the **Base Source** field, use the LOV to select **Rule Generated**.

6. Complete the following optional fields, if applicable (i.e. if auditing a prior Review Campaign):

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

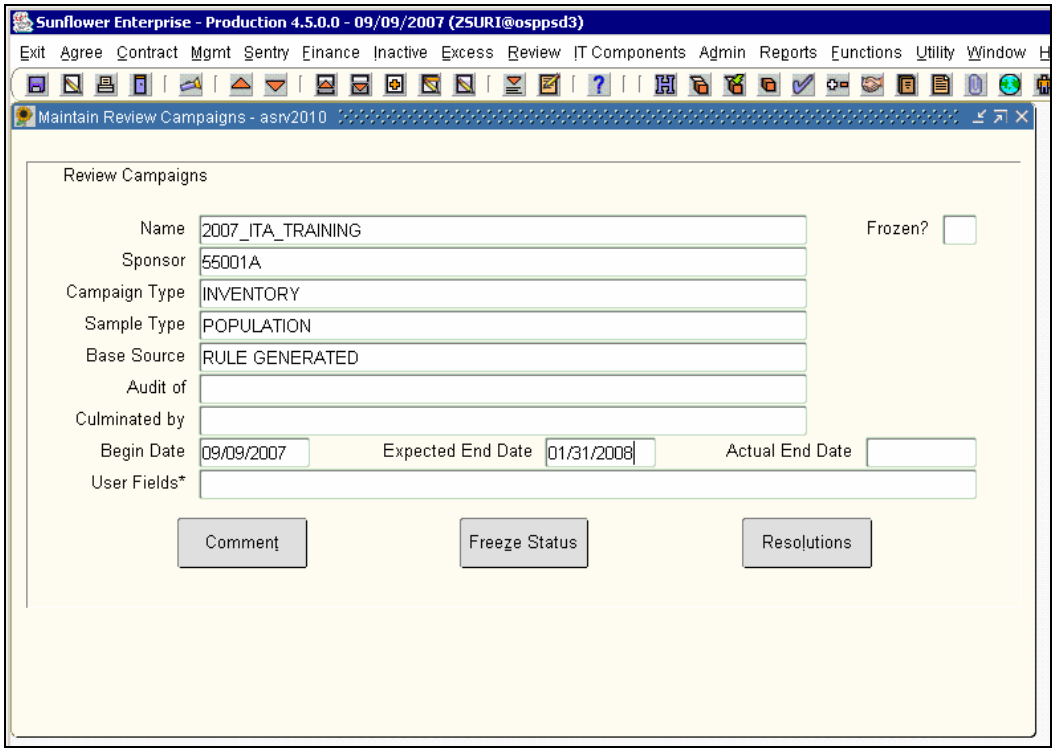
7. Enter or select the **Begin Date** for the Review Campaign.

8. Enter or select the **Expected End Date** for the Review Campaign.

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

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

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



End of activity.

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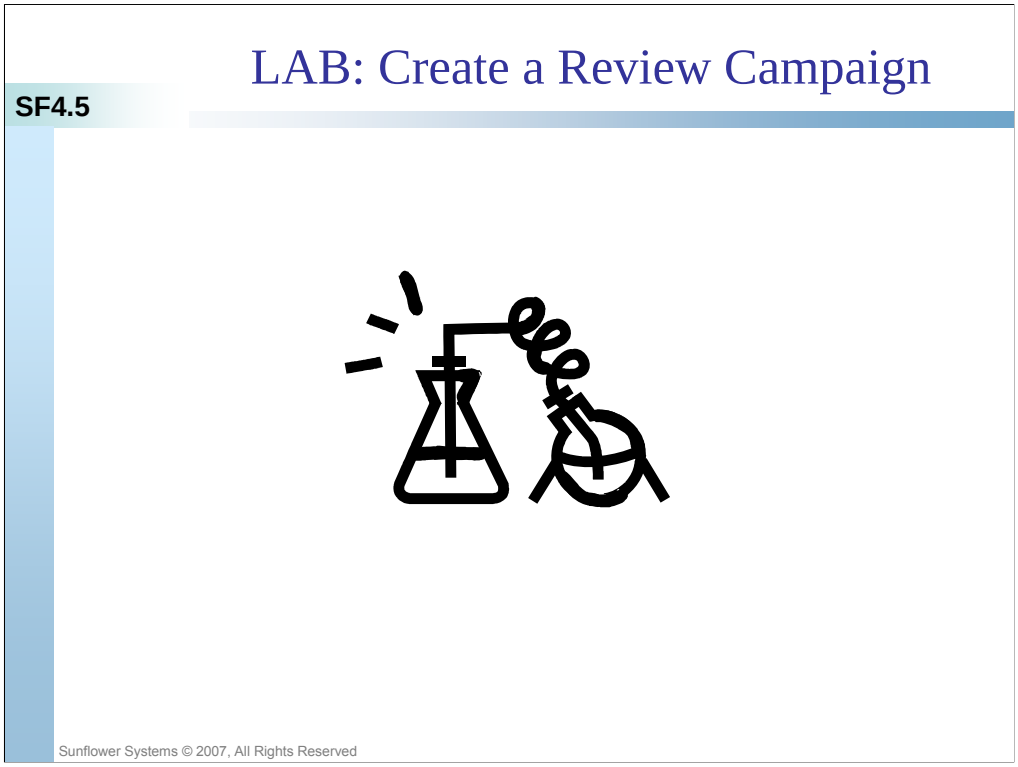


Create a Review Campaign with the following parameters:

Name = Type in Your Student ID number + today's date (e.g., Student0109152007)

Sponsor = ITA (or 55)

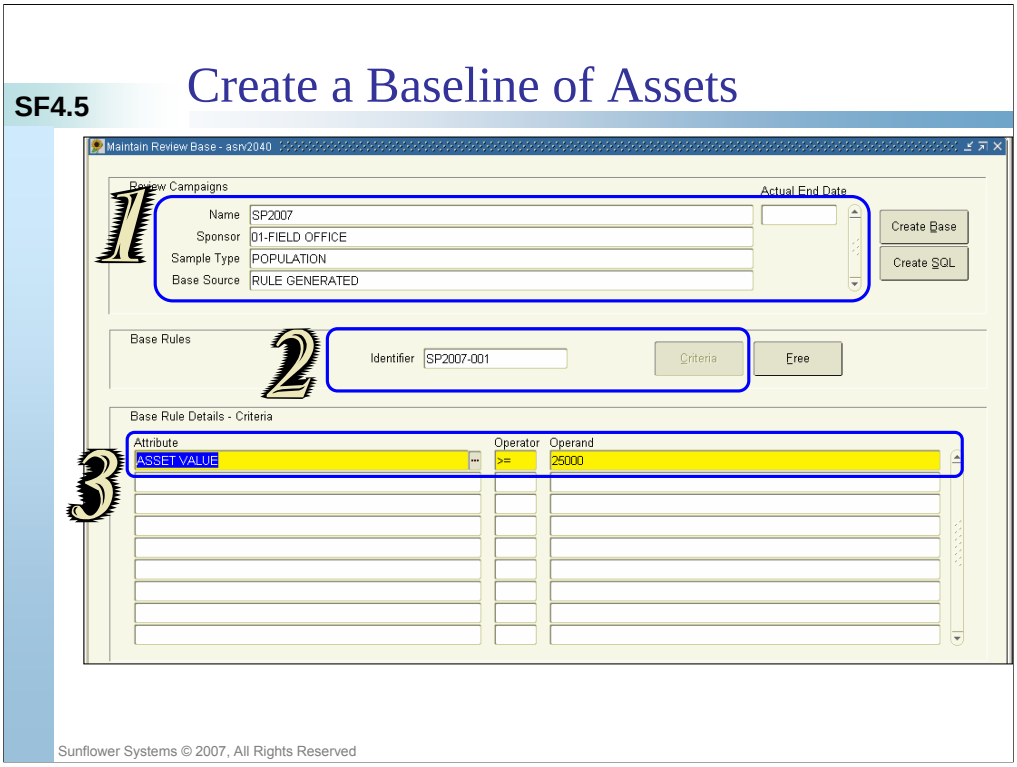
Campaign Type = Inventory

Sample Type = Population

Base Source = Rule Generated

Begin Date = 05/30/2007

End Date = 11/15/2007



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

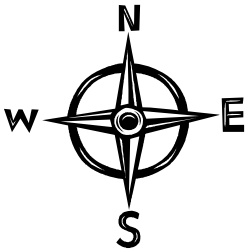
All conditions (Base Rule Details) for the Base Rule constitute an **AND**. If multiple Base Rules are used, they constitute an **OR**. For example if Base Rule #1 states asset value >= 25000 AND custodial area = 50 then assets must meet **both** of those conditions to be included. However if Base Rule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

Best Practices Recommendation:

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

NAV: Create a Baseline

SF4.5



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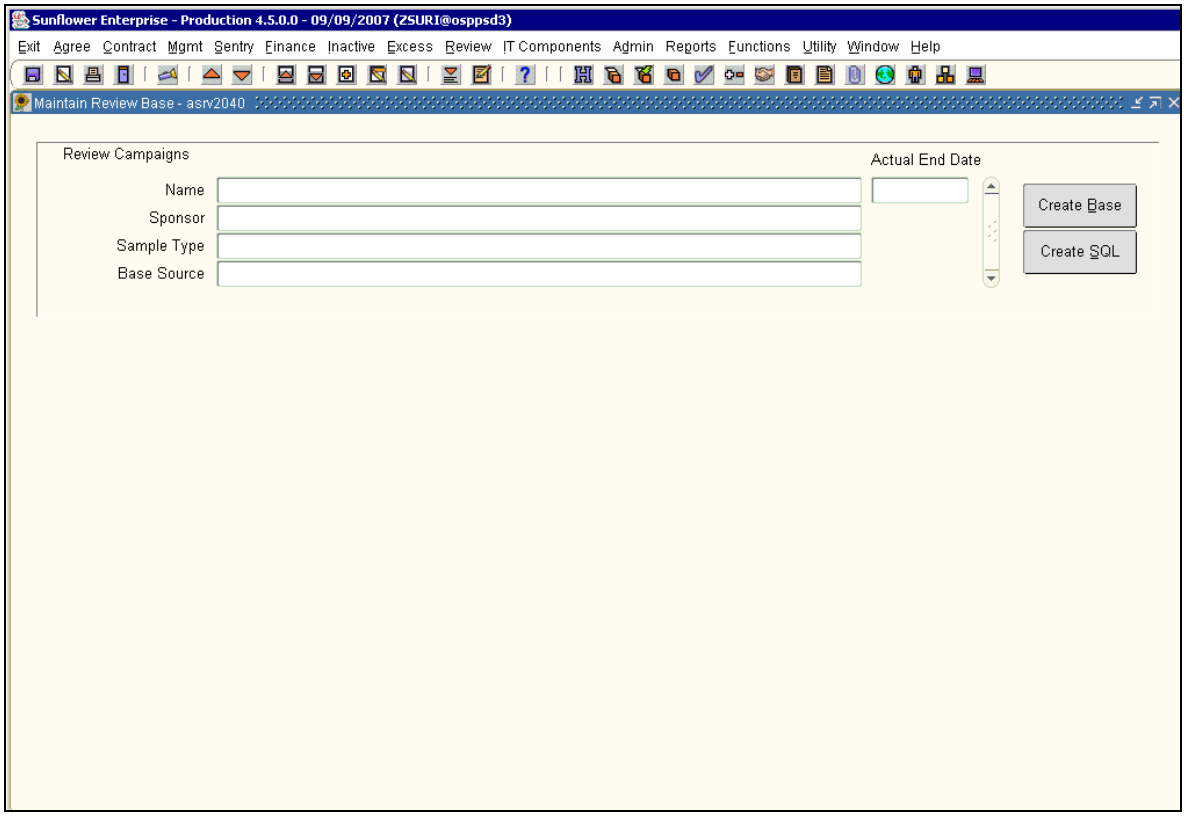
Create a Baseline

Review Manager
M > Review> Maintain Review Base
Maintain Review Base



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

<u>Result:</u> The review campaign properties autofill.

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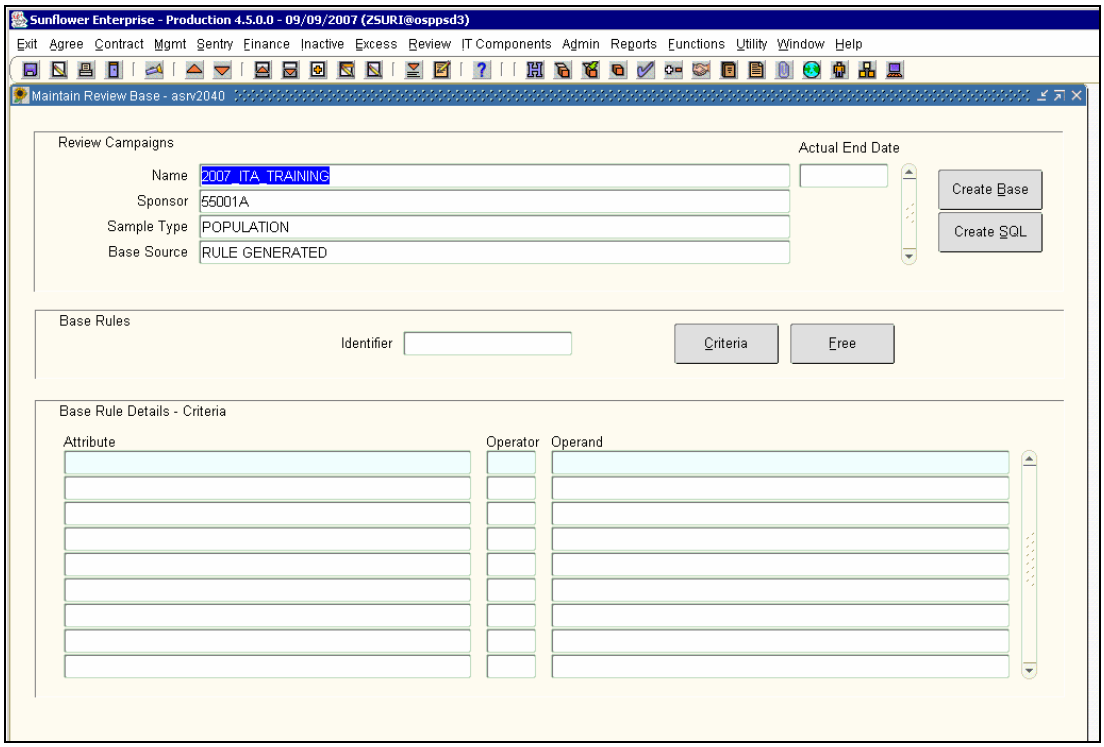

3. Enter a unique Base Rule Identifier in the **Identifier** field.

4. In the **Attribute** field, enter or select **INTEREST ASSET TYPE**.

5. In the **Operator** field, enter or select the = sign.

6. In the **Operand** field, enter or select **INVENTORY ASSET**.

7. In the next blank **Attribute** field, enter or select **Manager**.

8. In the **Operator** field, enter or select the = sign.

9. In the **Operand** field, enter or select the **Bureau or Region**.

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

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

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

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

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

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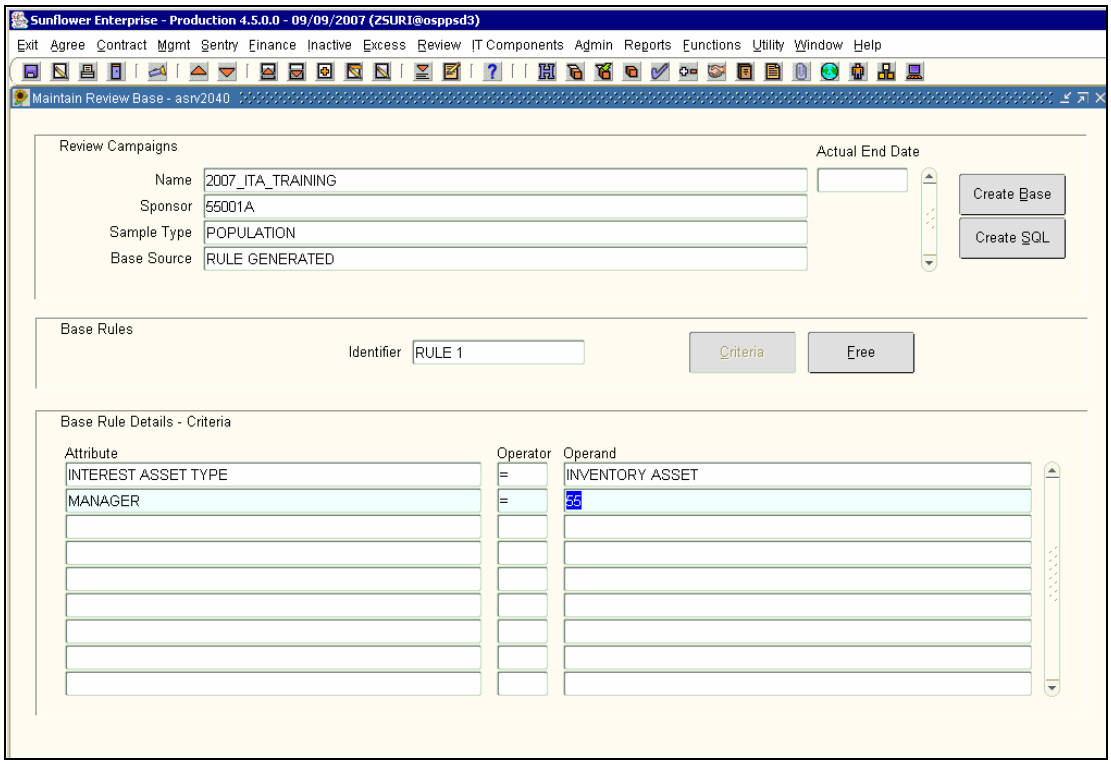
Result: A pop-up window appears displaying how many baseline assets were created based on the Base Rules.

12. Select the **OK** button.

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



End of activity.

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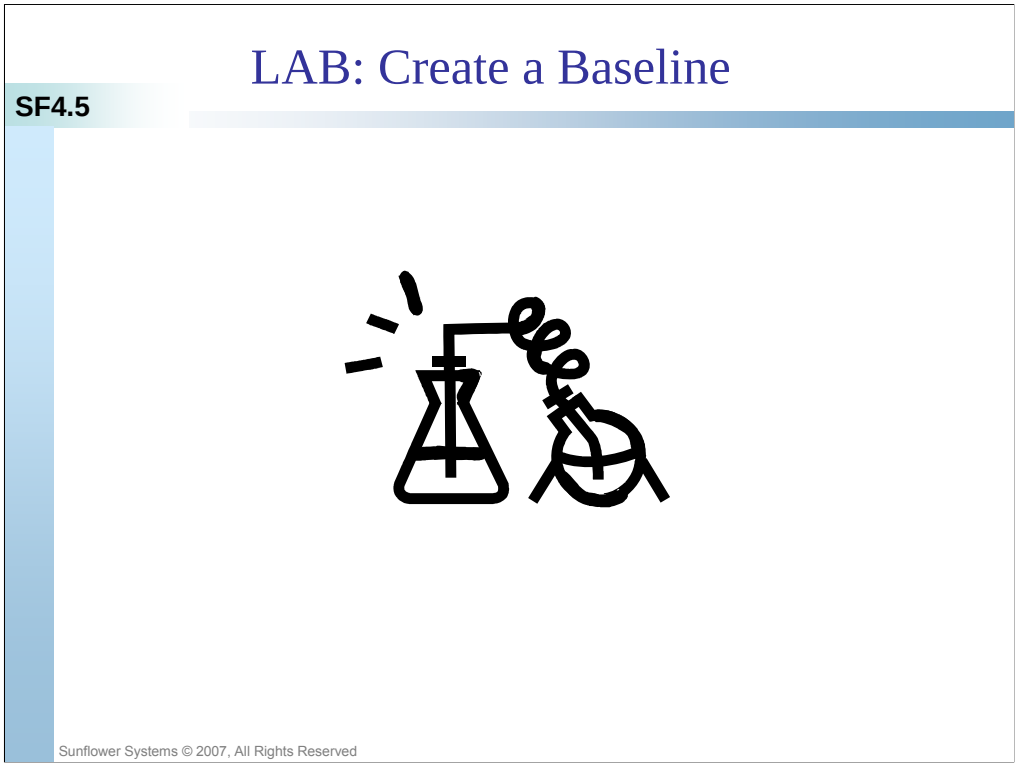
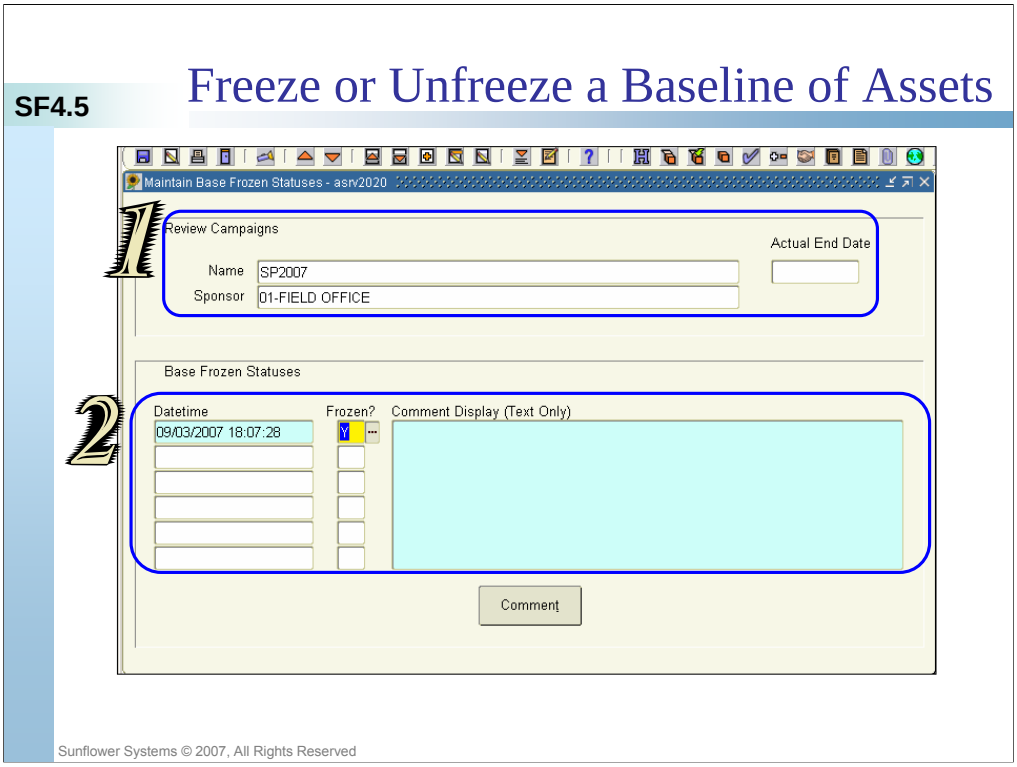


Search for and use the review campaign you created with the name **Student ID number + today's date** (e.g., Student0109152007). Create the baseline following the instructions in the NAV, Create a Baseline on the preceding pages.



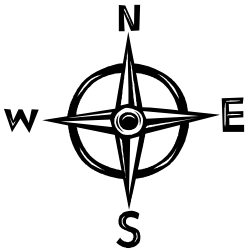
By freezing your campaign you are establishing a set inventory to easily identify lost assets and assets found during inventory. If you did not freeze your campaign your inventory would be a constant moving target. It may be necessary to unfreeze a campaign (for example, a change in the Base Rules) to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

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

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

SF4.5

NAV: Freeze or Unfreeze Baseline Assets



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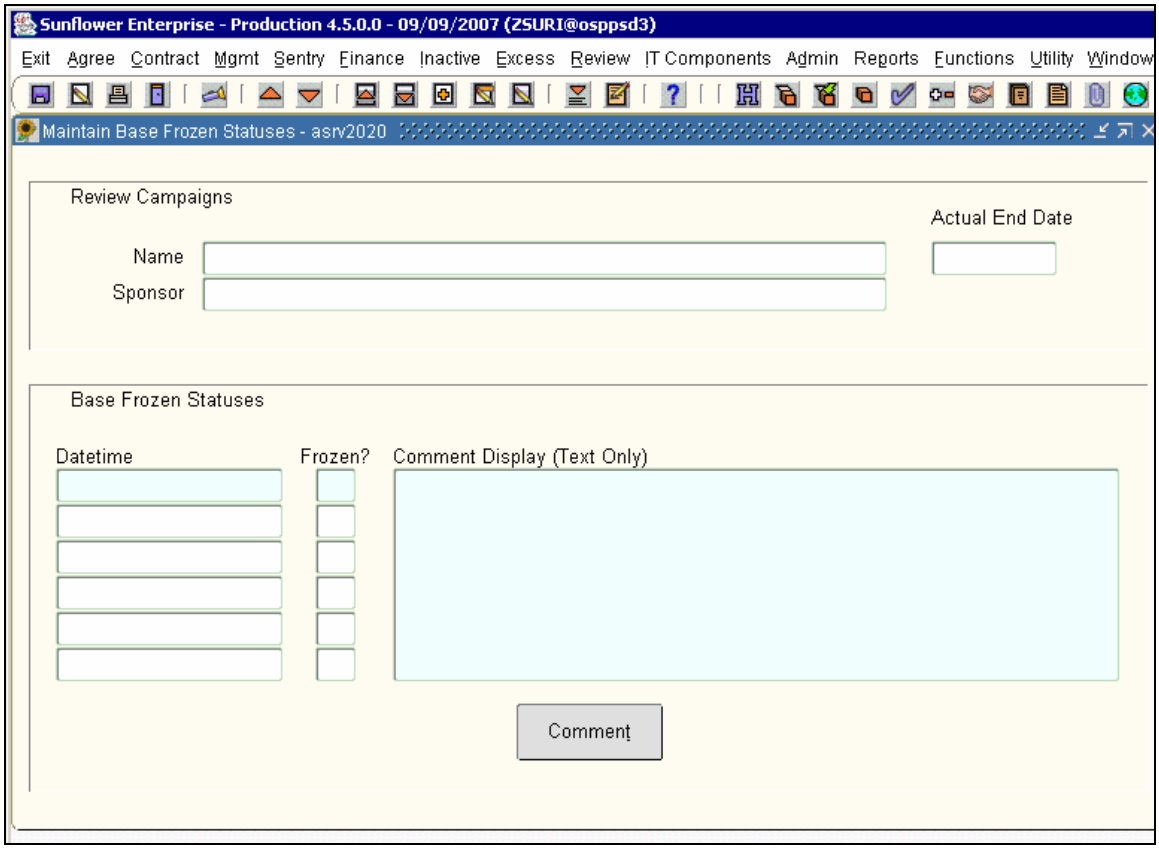
Freeze or Unfreeze Baseline Assets

Review Manager
M > Review> Maintain Base Frozen Statuses
Maintain Base Frozen Statuses



1. Enter the Review Campaign Name in the **Name** field.

2. Select the **Find** icon to execute the query.

<u>Result:</u> The remaining fields autopopulate.

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

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

Goto task #5

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

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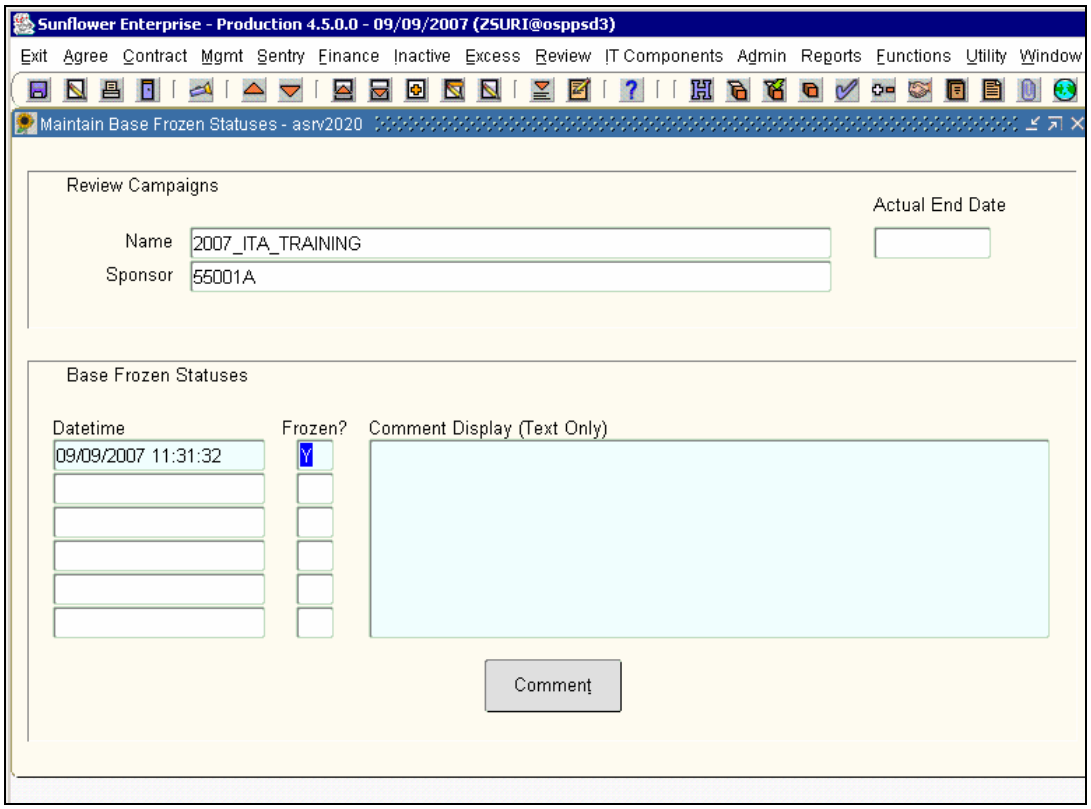
– To *Unfreeze* the base: Under **Frozen,** select **N.**

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

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

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



End of activity.

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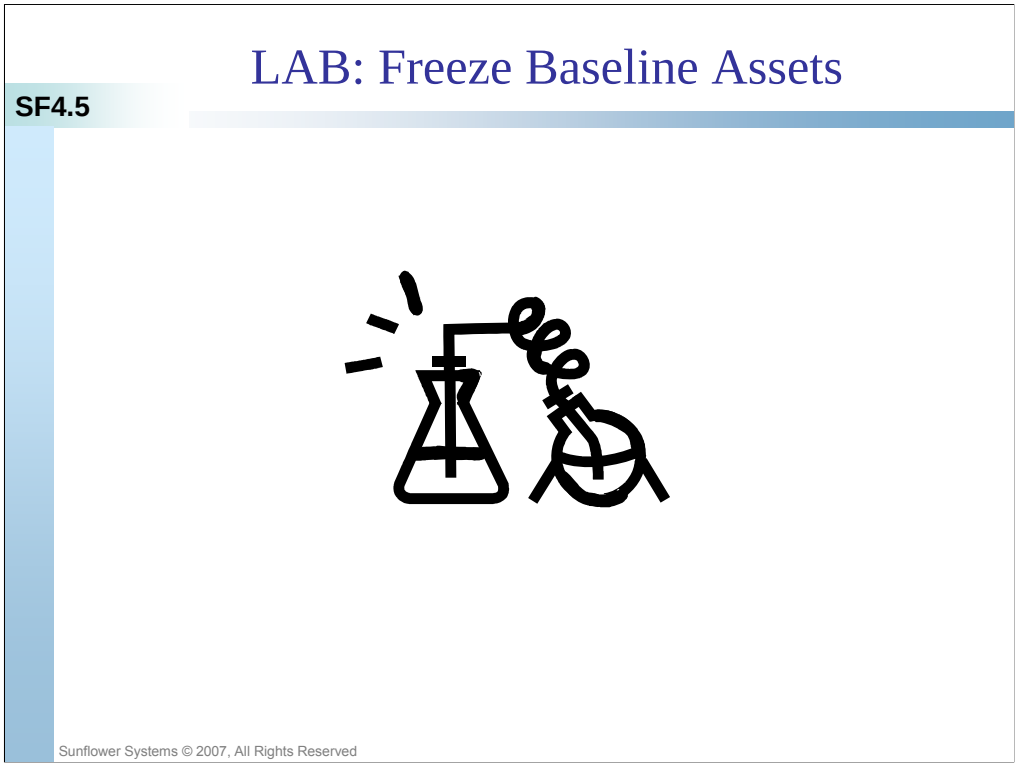
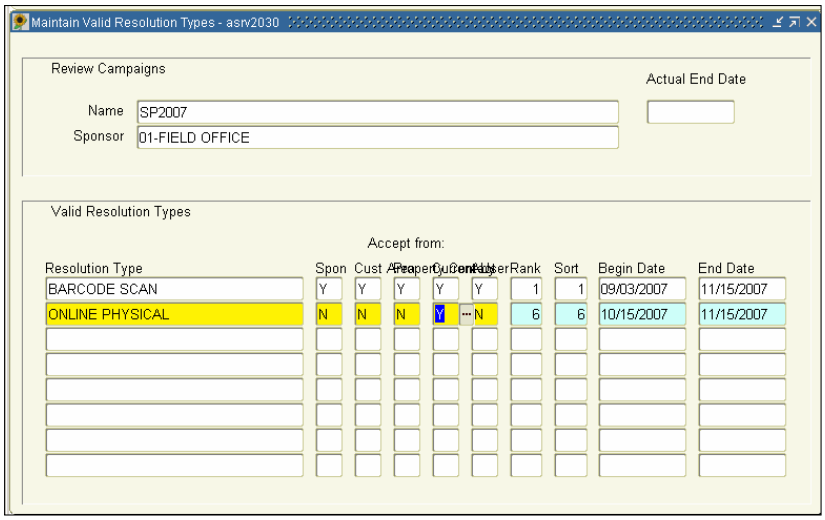


Freeze the baseline assets for the review campaign you created with the name **Student ID number + today's date** (e.g., Student0109152007).

SF4.5

Campaign Resolution Types



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

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

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

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

SF4.5

Campaign Resolution Types

Valid Resolution Types

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

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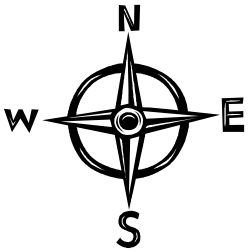
The above screen shot shows the best types of resolutions to select when conducting a review campaign. Note that not all users are allowed to enter all types of resolutions and the date range is also limited for some resolution types. It is a good idea to allow all users the ability to scan and allow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

NAV: Enter Valid Resolution Types

SF4.5



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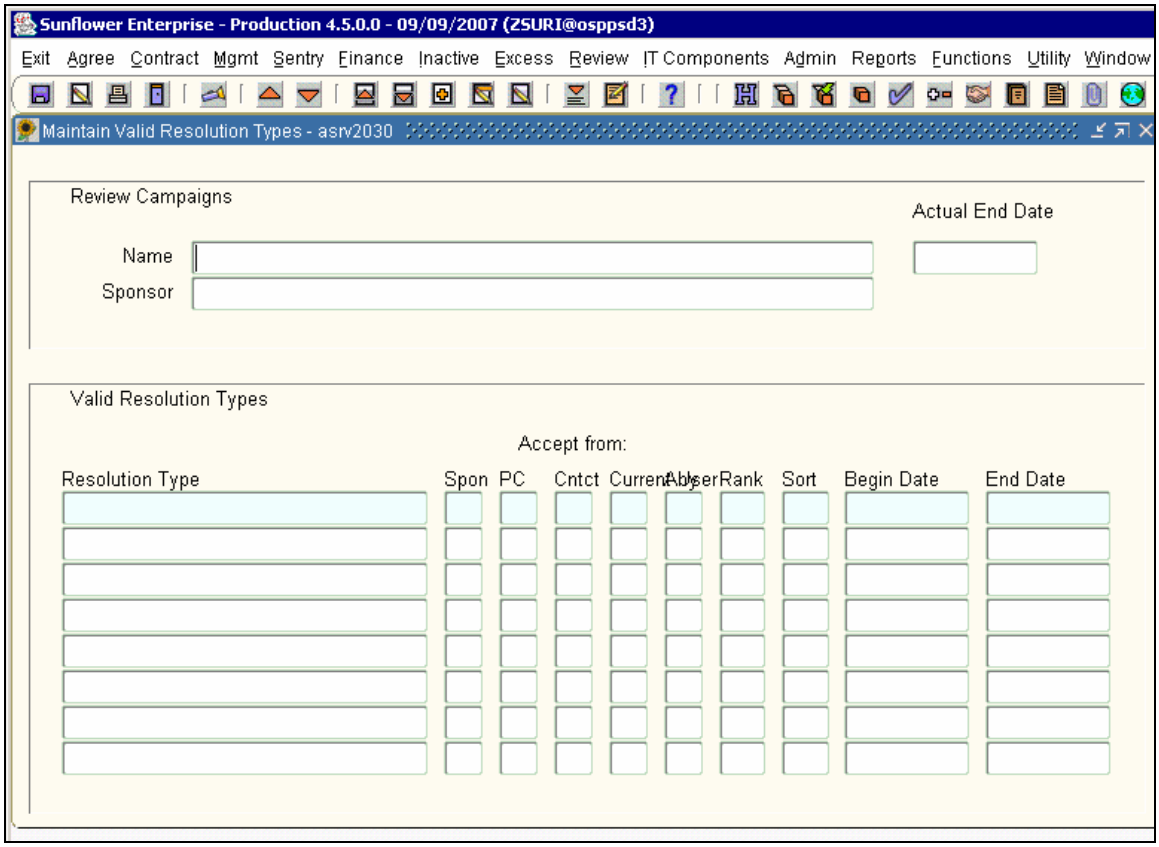
Enter Valid Resolution Types

Review Manager
M > Review> Maintain Valid Resolution Types
Maintain Valid Resolution Types



1. Enter the Review Campaign Name in the **Name** field.

2. Select the **Find** icon from the toolbar to execute the query.

<u>Result:</u> The Sponsor populates.

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

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

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

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

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

5. **Tab** to the next field.

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

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

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

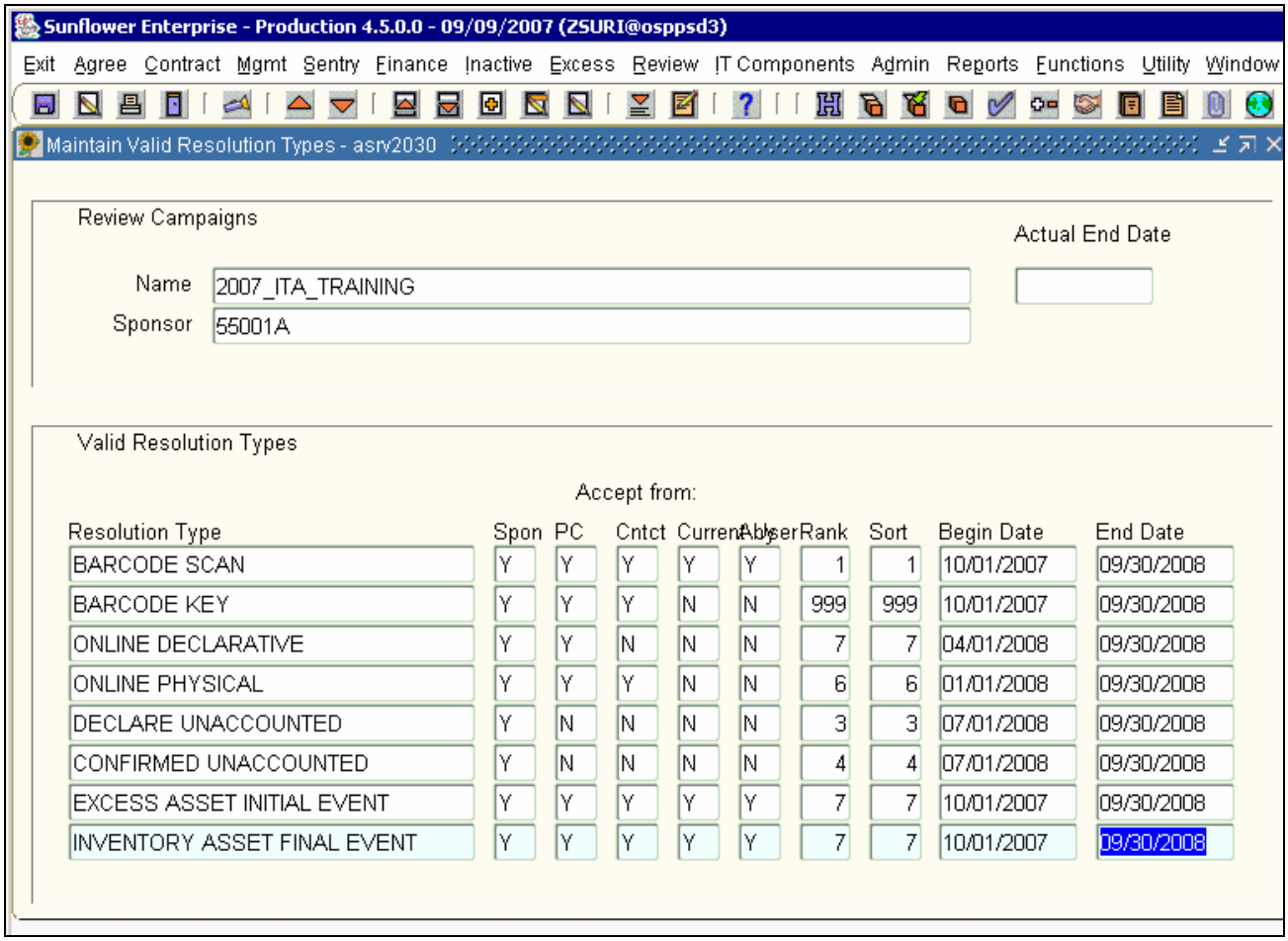
Note: If a begin date is not selected, any resolutions from previous Review Campaigns could be linked to the current Review Campaign.

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

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

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

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



End of activity.

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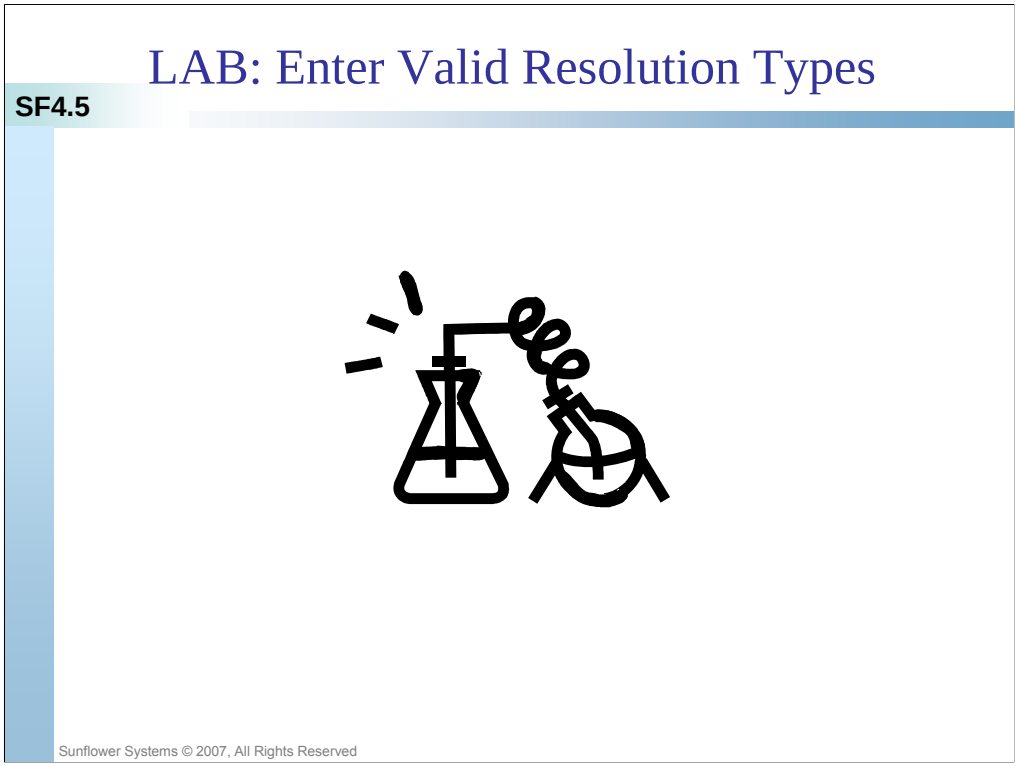
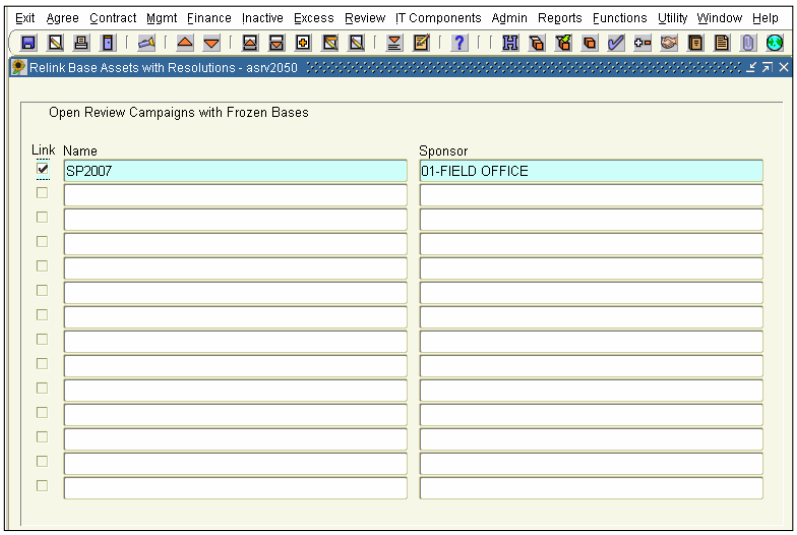


Create Valid Resolution Types for the review campaign you created with the name **Student ID number + today's date** (e.g., Student0109152007).

SF4.5

Relink Base Assets with Resolutions



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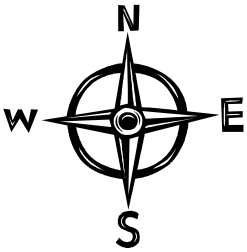
Every time a base is frozen OR anything on the valid resolution types is changed then you should relink any resolutions for that review campaign. Re-linking resolutions accounts for any resolutions that already exist for the base of the review campaign but are not associated (linked) with that review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

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

NAV: Relink Base Assets with Resolutions

SF4.5



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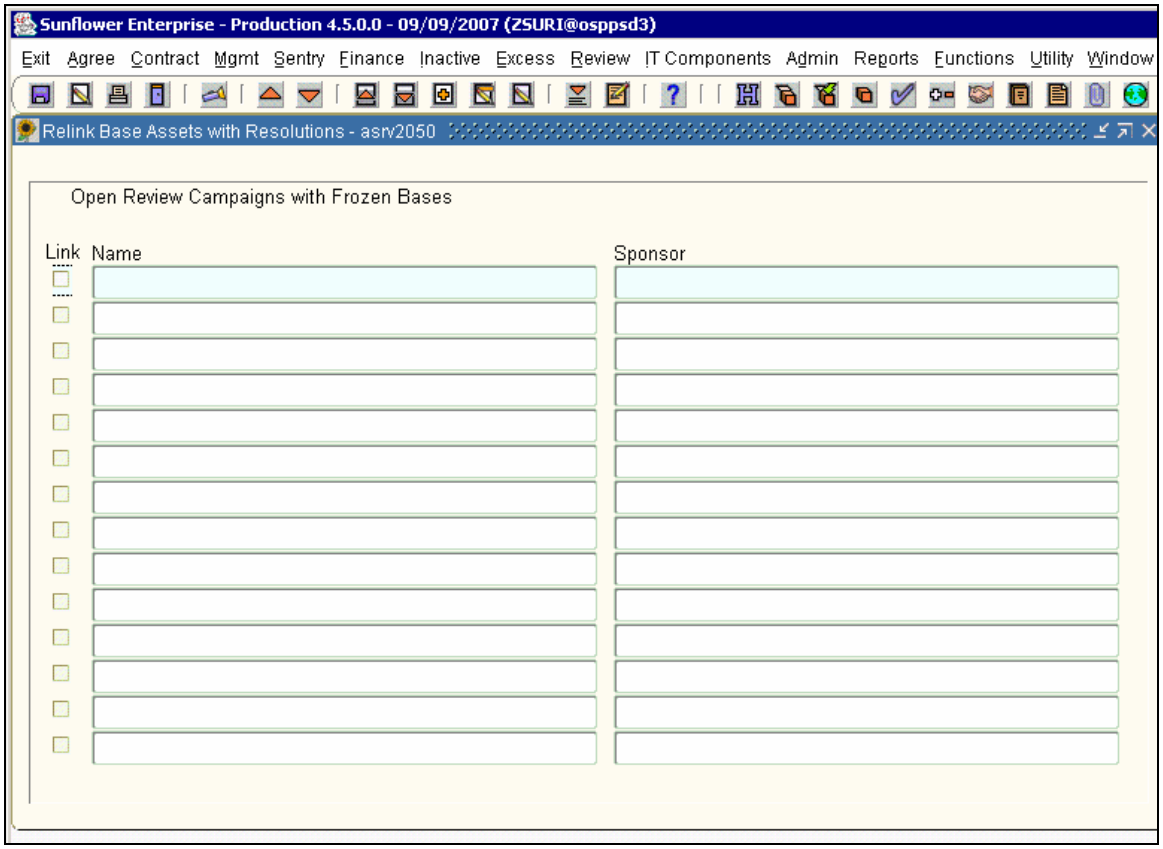
Relink Base Assets with Resolutions

Review Manager
M > Review> Relink Base Assets with Resolutions
Relink Base Assets with Resolutions



1. Enter the **Name** of the Review Campaign to which you want to link any valid existing resolutions.

2. Select the **Find** button from the toolbar to execute the query.

Result: The **Sponsor** will autofill.

3. Click on the **Link** check box next to the **Name** of the Review Campaign.

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

5. Review the message on the status bar to ensure that any existing resolutions of base assets that were valid for the Review Campaign got linked with the Review Campaign successfully.

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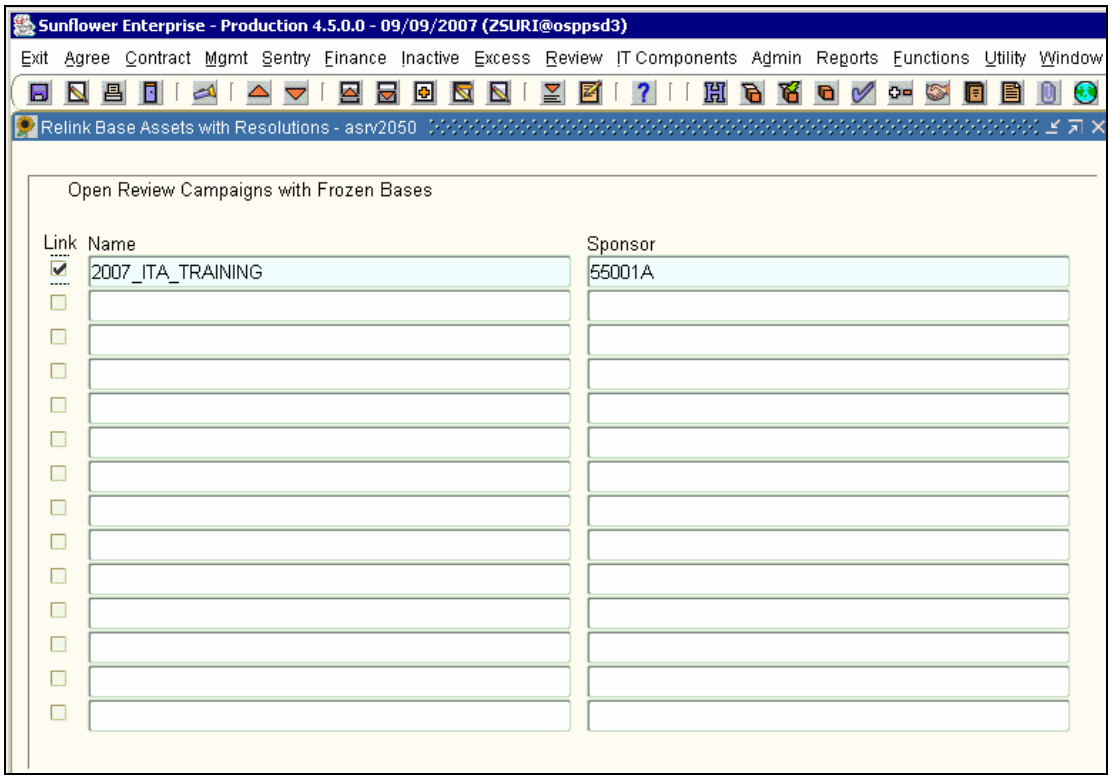
Example: Below is a sample window of campaigns with relinked resolutions:



End of activity.

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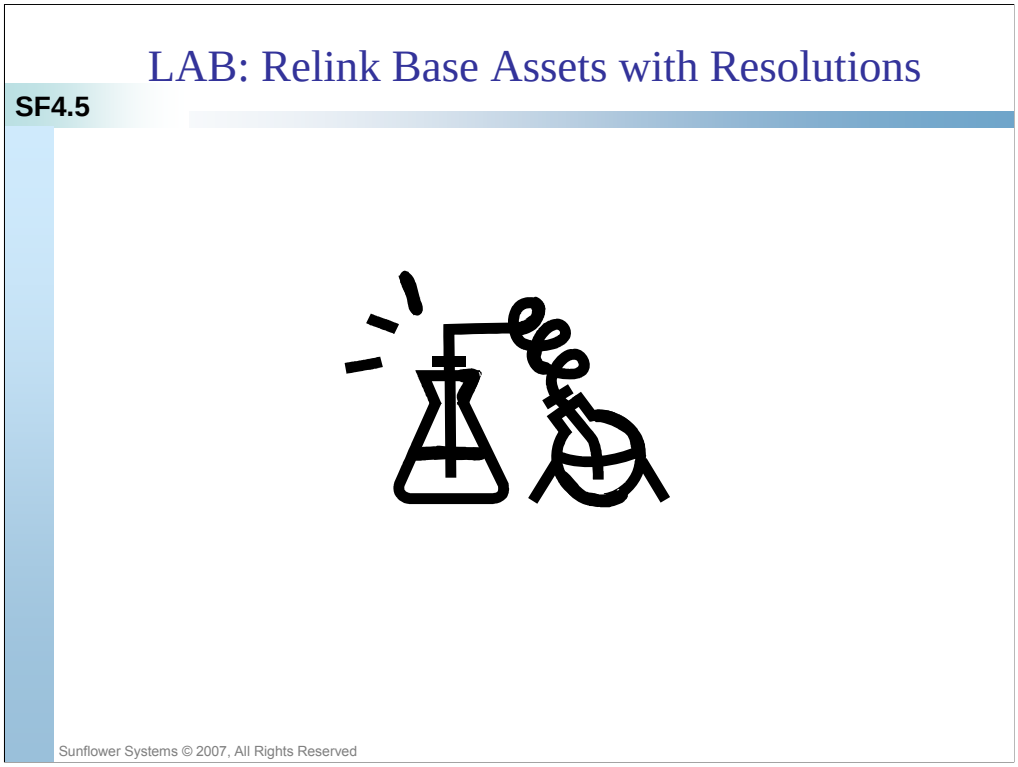

Relink the base assets with resoluitons for the review campaign you created with the name **Student ID number + today's date** (e.g., Student0109152007).

SF4.5

Memo to PCs

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

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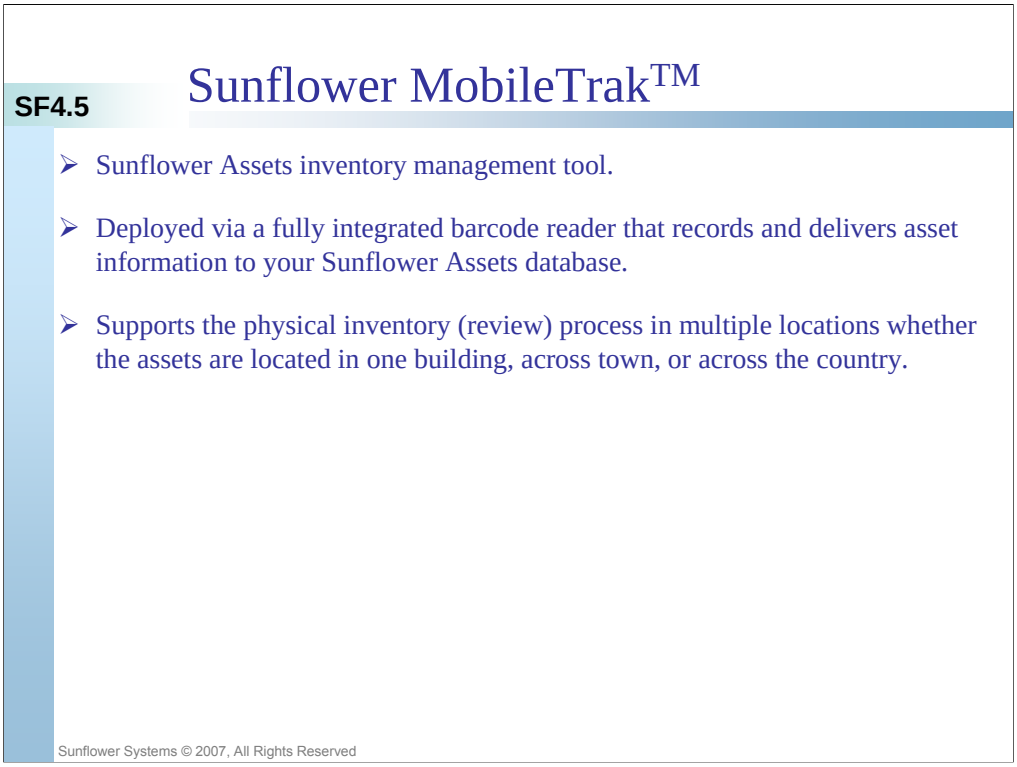
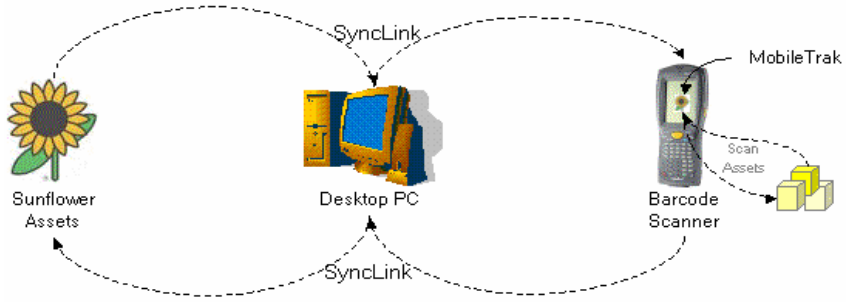


MobileTrak includes all of the files needed to perform a physical inventory with your barcode scanner. It is downloaded with all of DOC's asset data which includes values in the List of Values fields. Identification of an asset for physical inventory begins by defining a review campaign in Sunflower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

SF4.5

Barcode Scanner Software Suite

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



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SF4.5

MobileTrak™ - Overview

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

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SF4.5

MobileTrak - Download and Upload Assets

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

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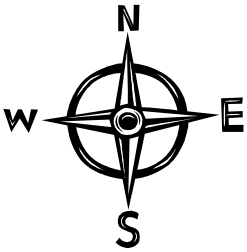
Inventory asset data is downloaded to the barcode scanners including all values in the LOVs which allows users to update information using the scanners as they are conducting the Review Campaign.

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

NAV: Send Asset Records to Scanner

SF4.5



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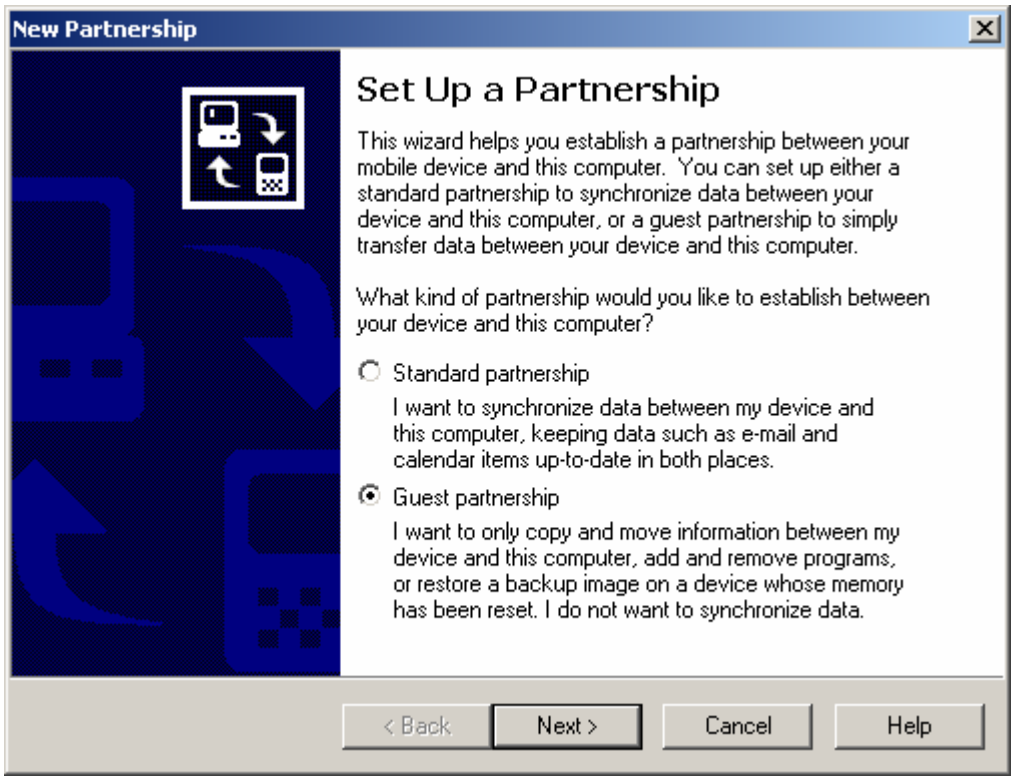
Send Asset Records to Scanner

Review Manager
I > SyncLink > MobileTrak
Sunflower SyncLink

1. Place the scanner in its cradle.

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



2. Select **Guest Partnership**.

3. Select **Next.**

4. Review the **Microsoft ActiveSync** dialog box to ensure that you are connected.

Example: Below is a sample of this connection:

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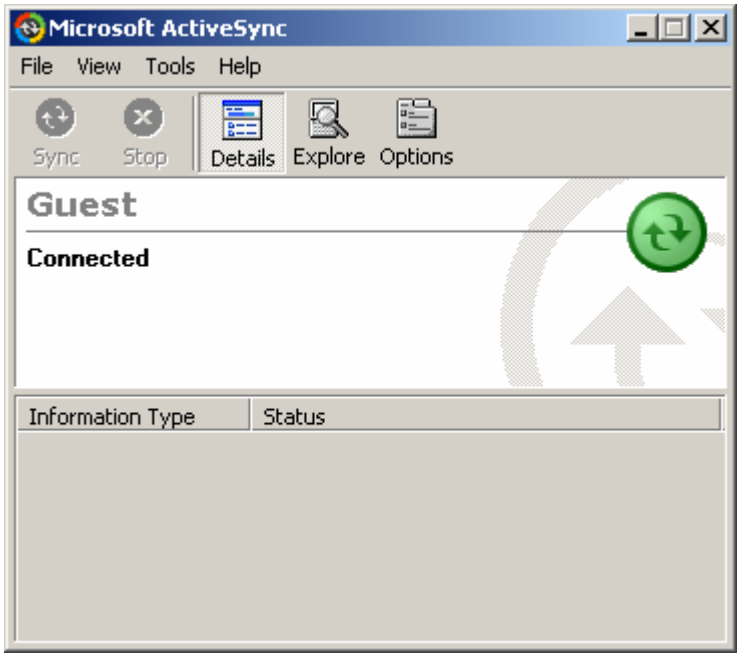

5. Select the **Minimize** button to minimize the window.

6. Select the **Synclink icon** on your desktop.

7. Enter your login information.

<u>Result:</u> The Sunflower **Synclink** window appears, as shown in the example below:

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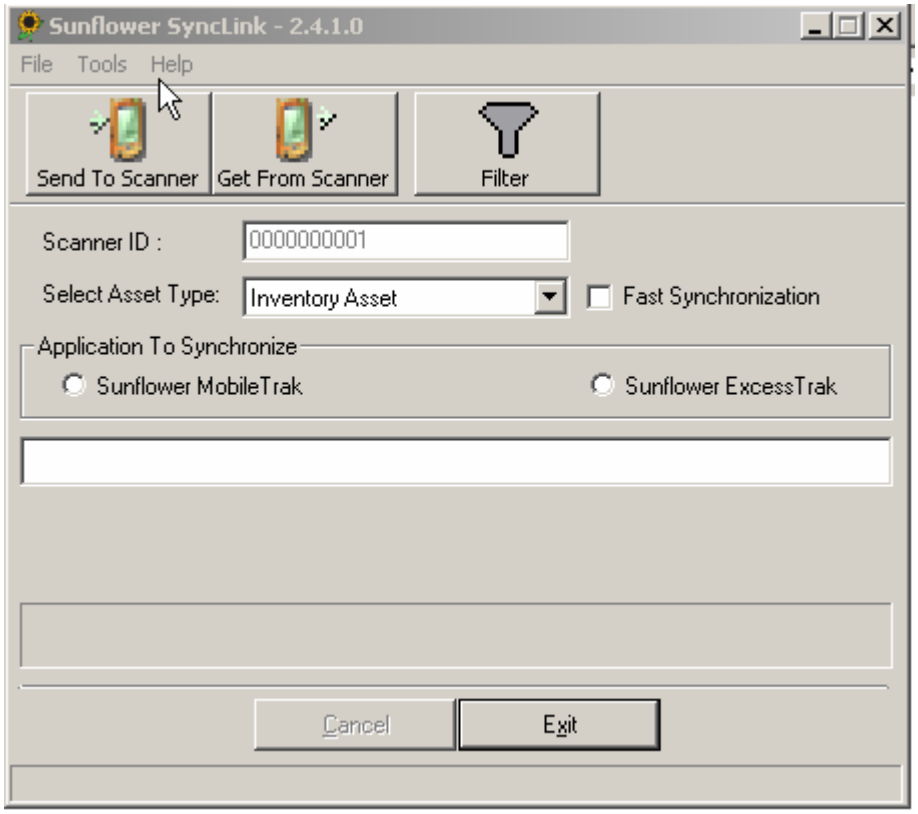

8. In the **Select Asset Type:** field, select **Inventory Asset**.

9. In the **Application to Synchronize** section of the screen, select **Sunflower MobileTrak**.

10. Select the **Filter** button.

Result: The SyncLink – Download Filter window is displayed.

11. Select the **Review Campaigns** tab.

12. Select the name of the Review Campaign whose assets you wish to send to the scanner.

13. Select the **Apply** button.

14. Select the **OK** button.

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

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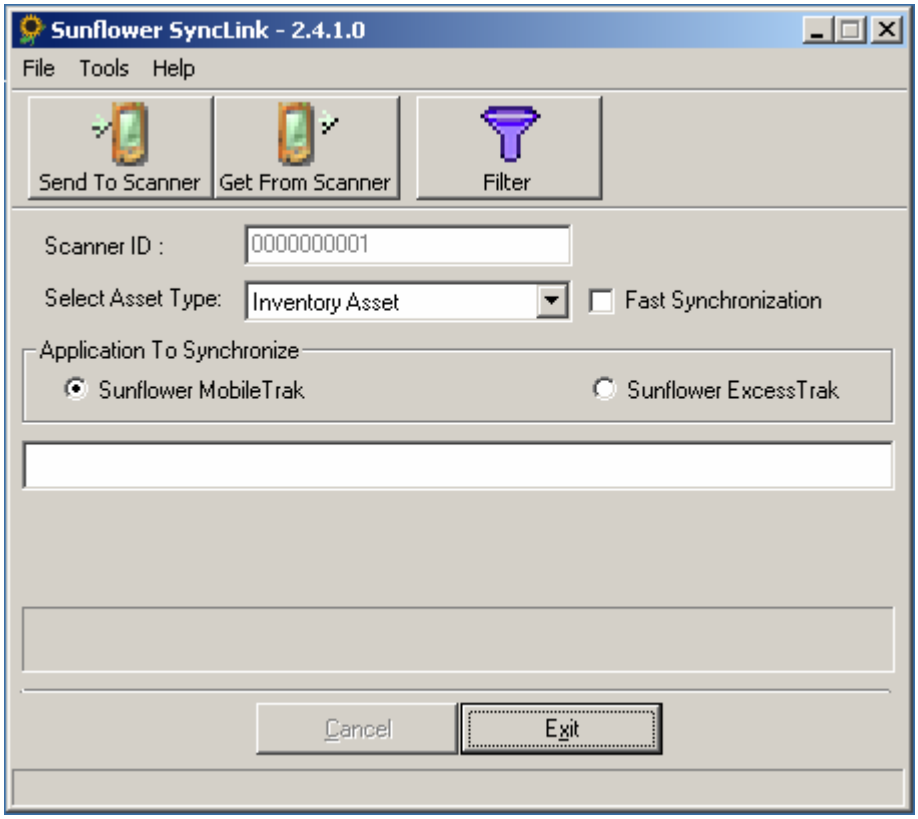

Note: The **Filter** button is now enabled indicating a filter is being used.

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

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

16. Select the **OK** button**.**

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

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

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

End of activity.

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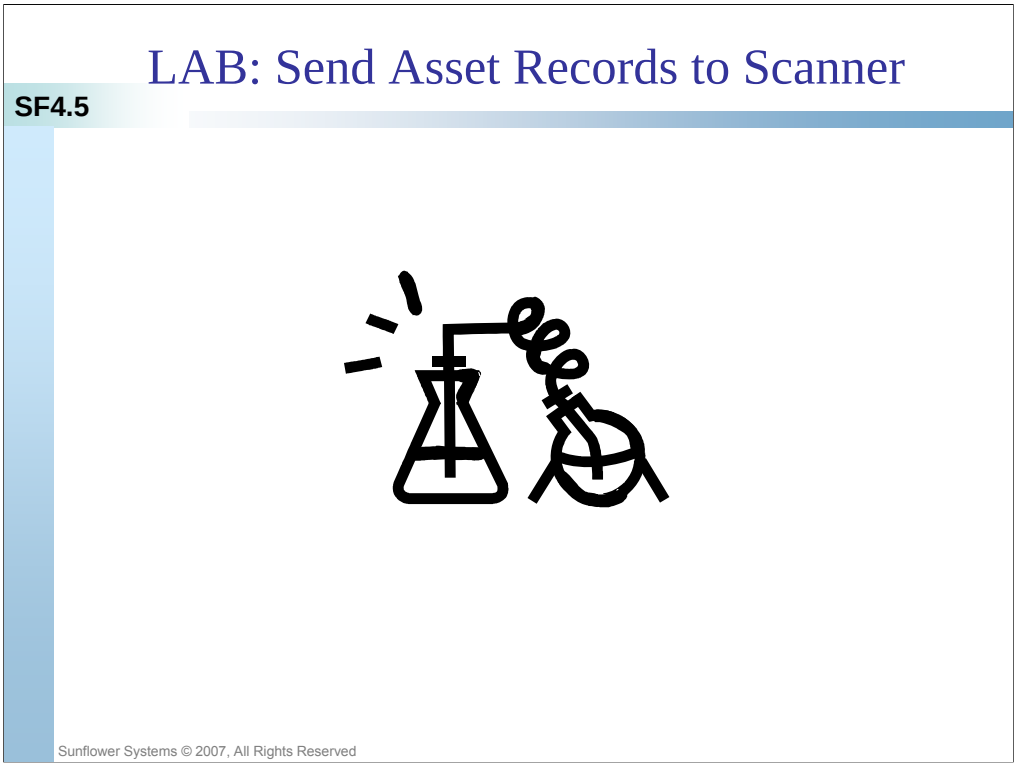
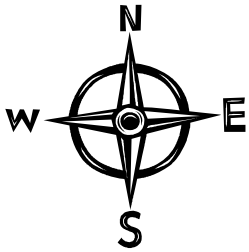


Check with your instructor to determine if scanners are available for conducting this Lab.

NAV: Upload Resolutions from Scanner

SF4.5



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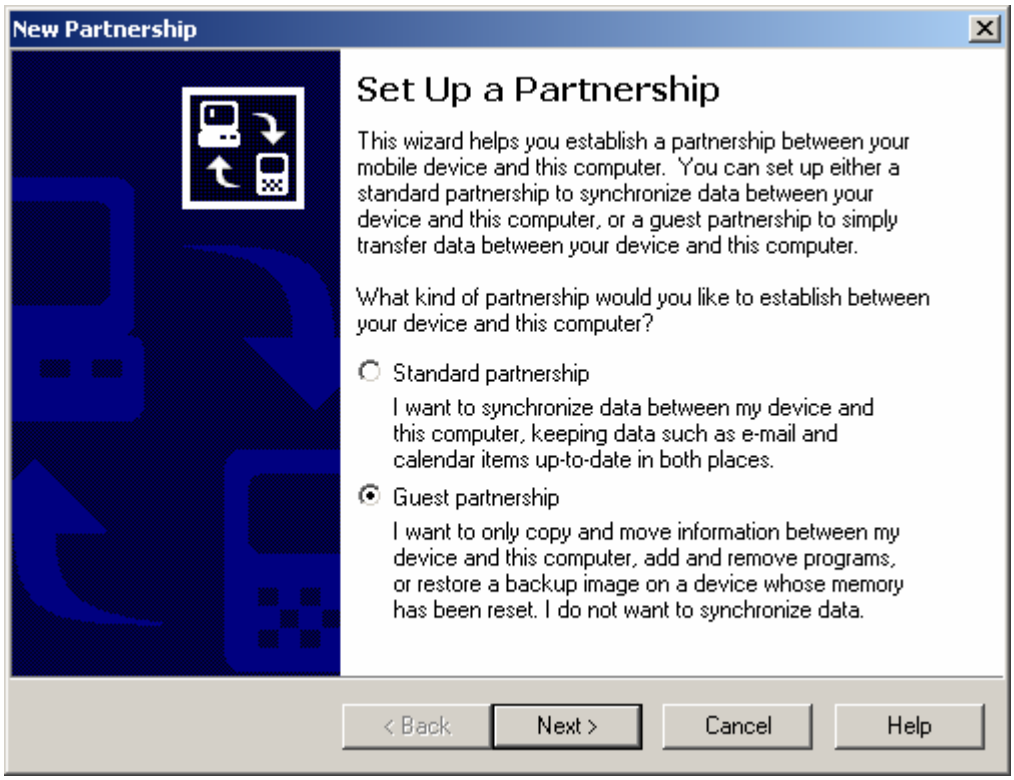
Upload Resolutions from Scanner

Review Manager
I > SyncLink
Sunflower SyncLink

1. Place the scanner in its cradle.

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



2. Select **Guest Partnership**.

3. Select **Next.**

4. Review the **Microsoft ActiveSync** dialog box to ensure that you are connected.

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

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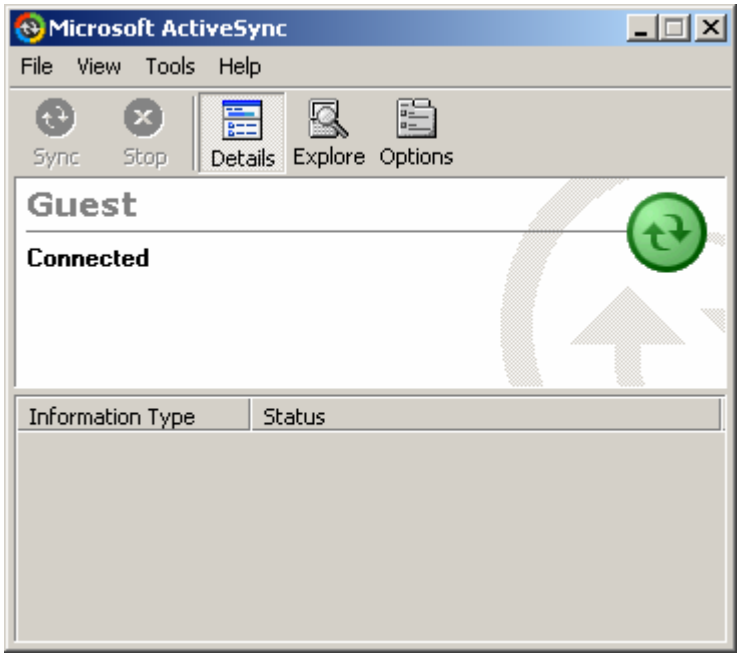

5. Select the **Minimize** button to minimize the window.

6. Select the **Synclink icon** on your desktop.

7. Enter your login information.

<u>Result:</u> The Sunflower **Synclink** window appears, as shown in the example below:

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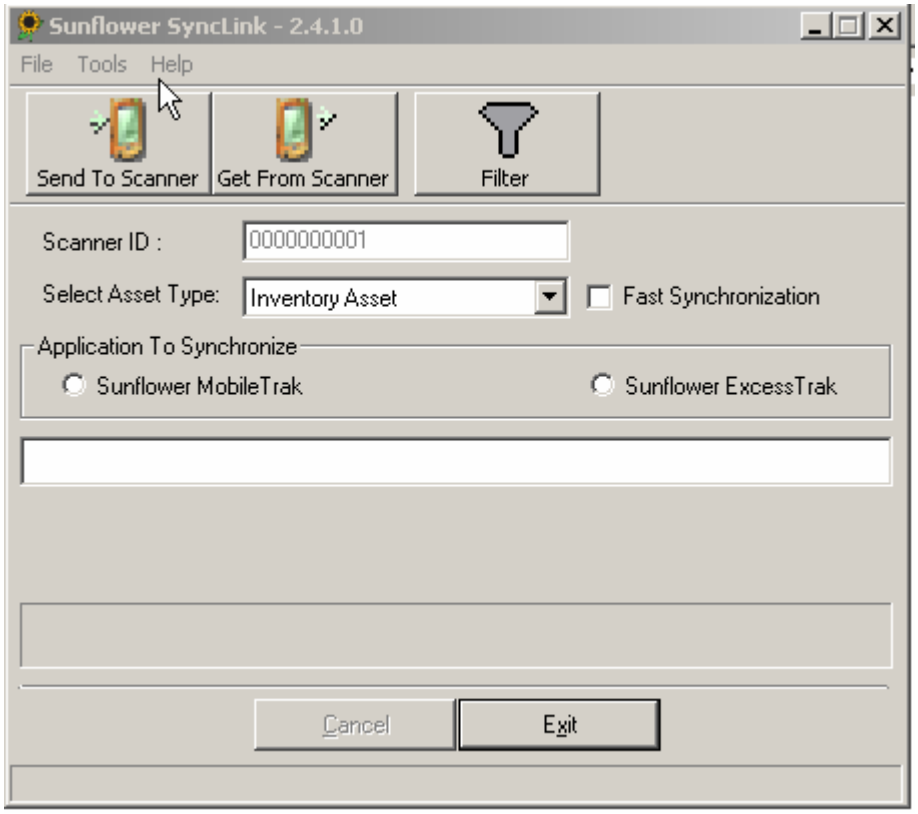

8. Select the **Sunflower MobileTrak** radio button.

9. Select the **Get From Scanner** button to begin uploading the files of assets from MobileTrak into the Sunflower Assets database.

10. When the upload is complete, **SyncLink** generates and displays an **Upload Processing Results** screen for verification, as shown in the example below.

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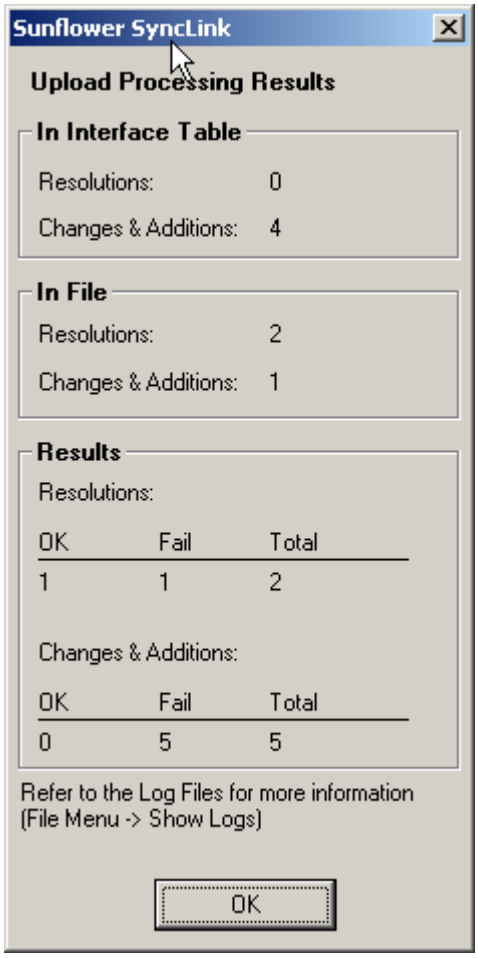
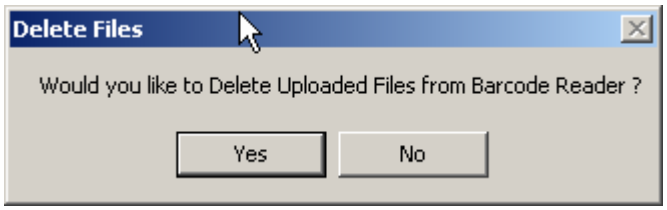


- **In Interface Table** shows records pending processing in the interface table prior to loading from the scanner.
- **In File** shows records that will be transferred from the scanner into the interface table.
- **Results** shows results of processing *all* records in the interface table, which includes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

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



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

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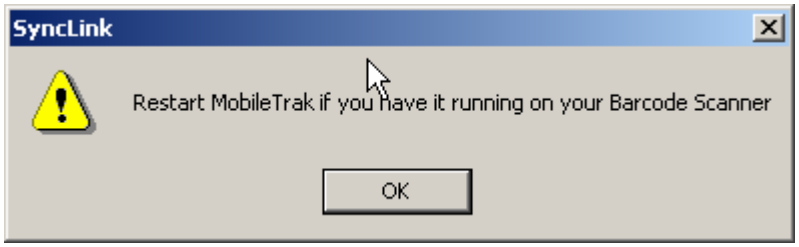

13. When told to **Upload Processing Results,** select **OK.**

End of activity.

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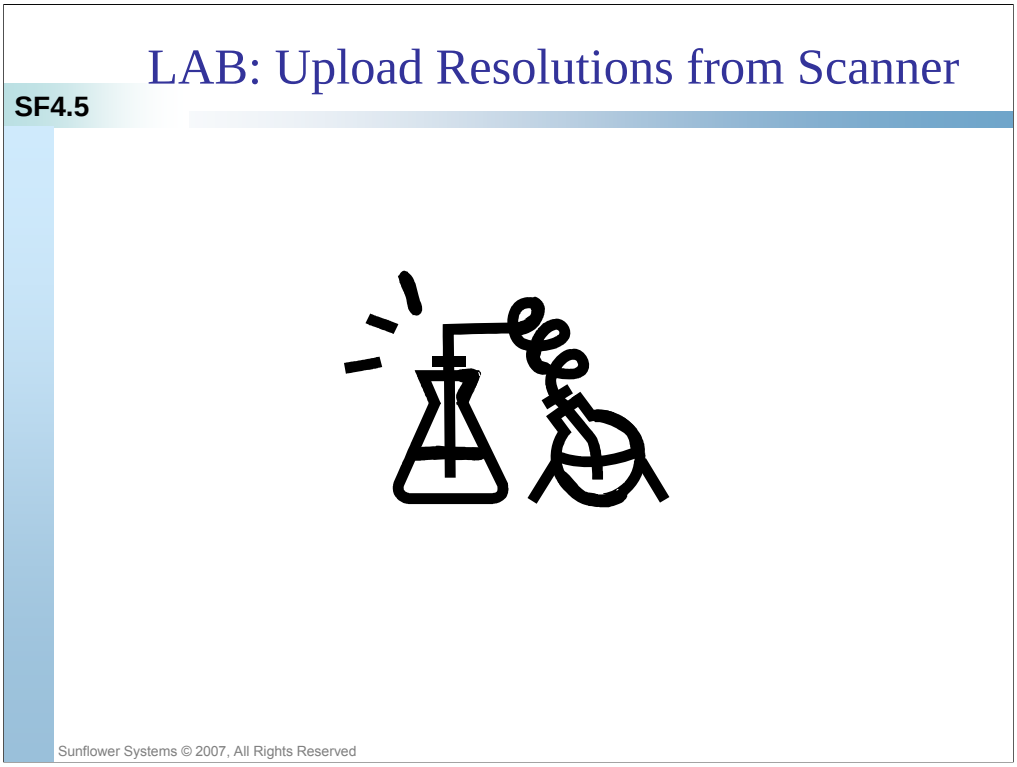

Check with your instructor to determine if scanners are available for conducting this Lab.

SF4.5

Review Scanned Resolutions

- Goal: to have all resolutions accepted
- Three primary reasons why a scanned resolution will fail:
  - New asset not created successfully and is sent to auxiliary resolution table
  - One of the location fields was entered incorrectly (site or building)
  - Person entering resolutions incorrectly entered their ID

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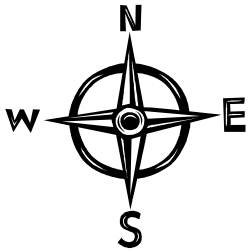
Run this report based on the scanner code and after the data from the scanner has been transferred (uploaded) to Sunflower.

NAV: Review Resolution Interface Processing Results

SF4.5



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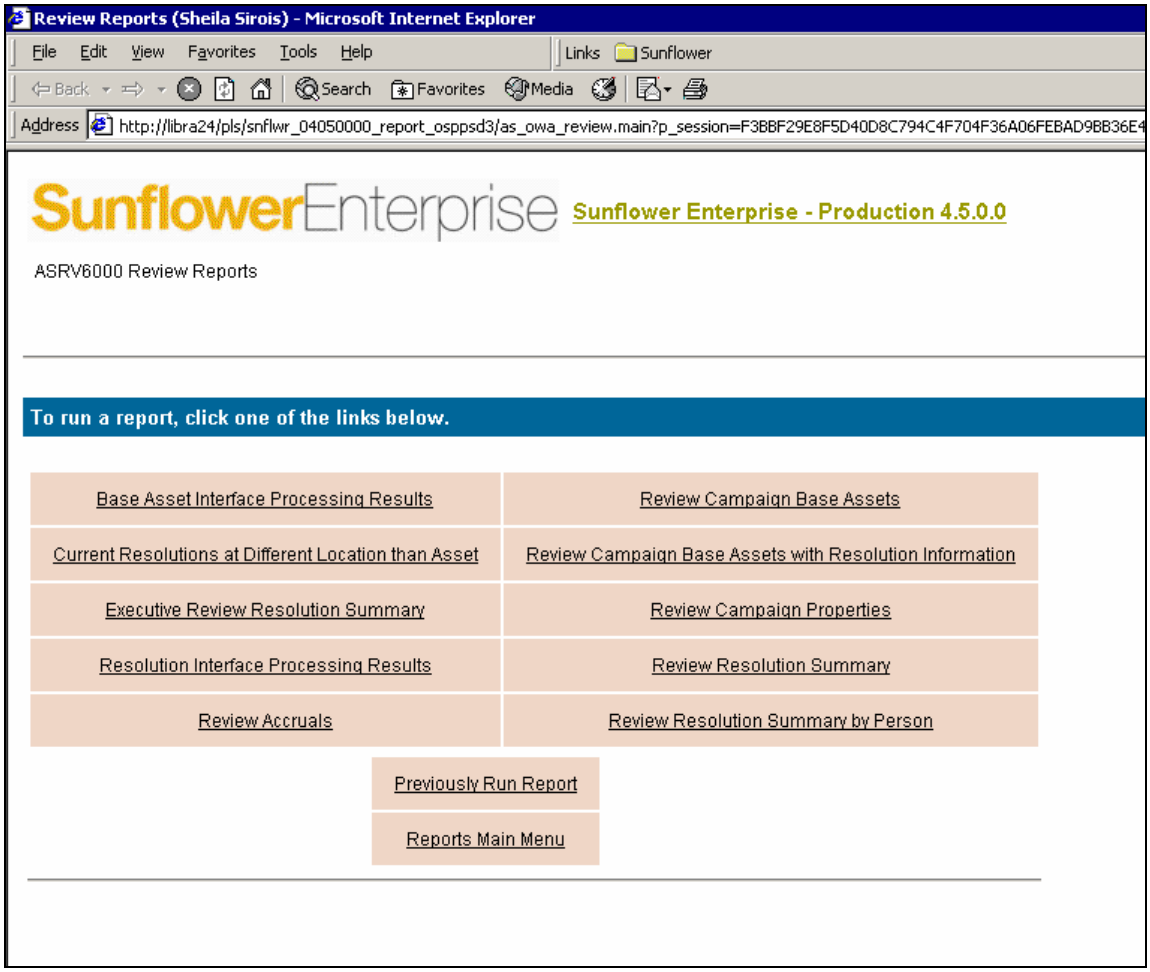
Review Resolution Interface Processing Results

Review Manager
M > Review > Review Reports
Review Reports



1. Select **Resolution Interface Processing Results.**

   Result: The **Resolution Interface Processing Results** parameters window displays:

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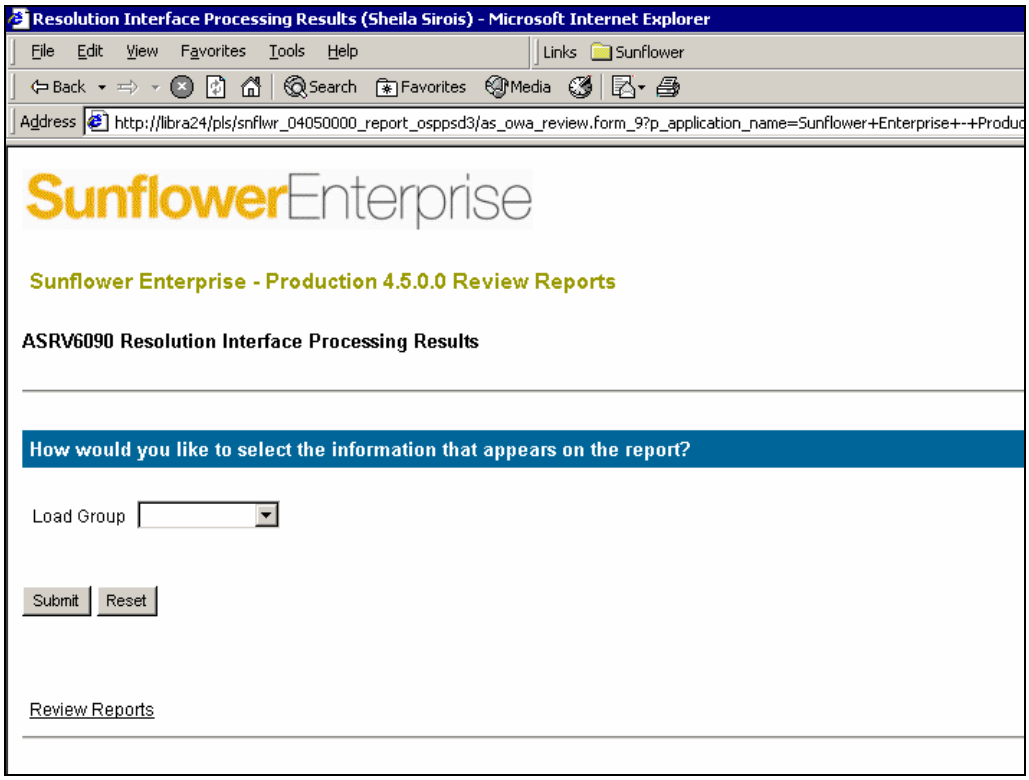

2. In the **Load Group** lookup list, select the Load Group number with the following format: **RS**<**Scanner ID**>.

   Note: To view the results from all scanners, leave the **Load Group** field blank.

3. Select **Submit.**

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

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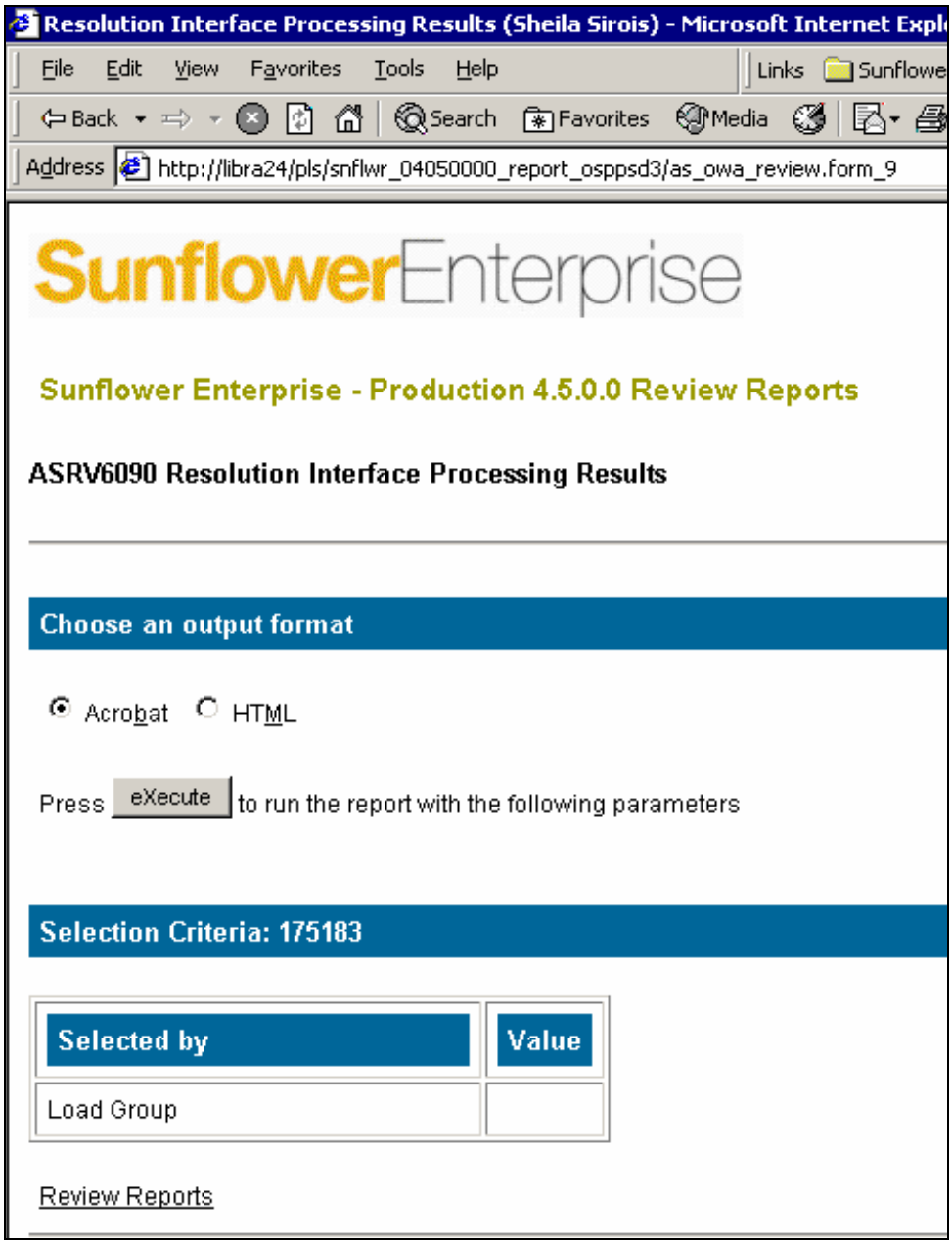

4. Select the **Acrobat** radio button.

5. Select **eXecute.**

Result: The report displays in a separate window, allowing you to review the resolution interface processing results.

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Sunflower Assets | Resolution Interface Processing Results | Page 2 of 4
ASRV6090 | 11/15/2005 18:41

RS0000000001 : RS0000000001

Record Group	Date	Result
11-1051102103751	11/03/2005 14:35:38	OK (Identifier:INV - 7.1.1.STEP11-1 Type:Date/Time:11/02/2005 10:37:51 Site:CAMPUS Stlvl 1:BUILDING 10 Stlvl 2:ROOM 123 Stlvl 3:)
Success Total	1	

Record Group	Date	Result
Failure Total	0	

Record Group	Date	Result
Unmatched Total	0	
Load Group Total	1	

Note: See below for an explanation of the report features:

- The first group shows the resolution records that were processed successfully.
- The second group shows the failed resolution records that could not be processed due to some error. Any errors should be investigated and fixed accordingly.
- The third group shows the unmatched resolution records that are stored in as_auxiliary_load_resolutions table to be processed later on when the found asset is successfully created in Sunflower Asset.

End of activity.

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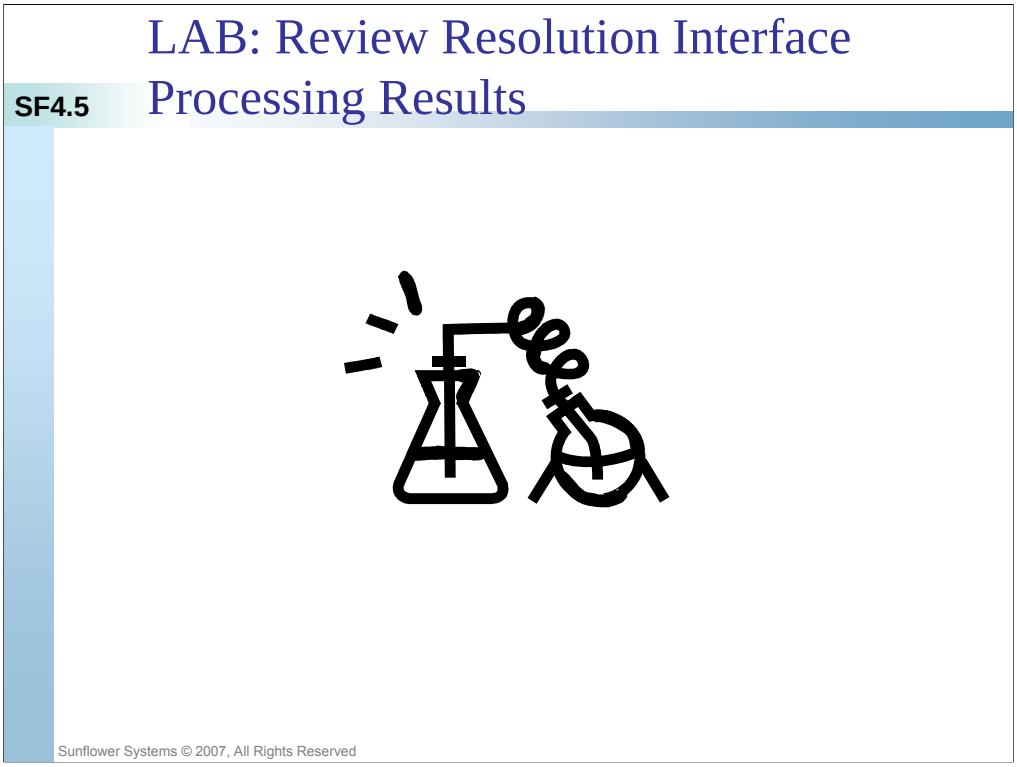
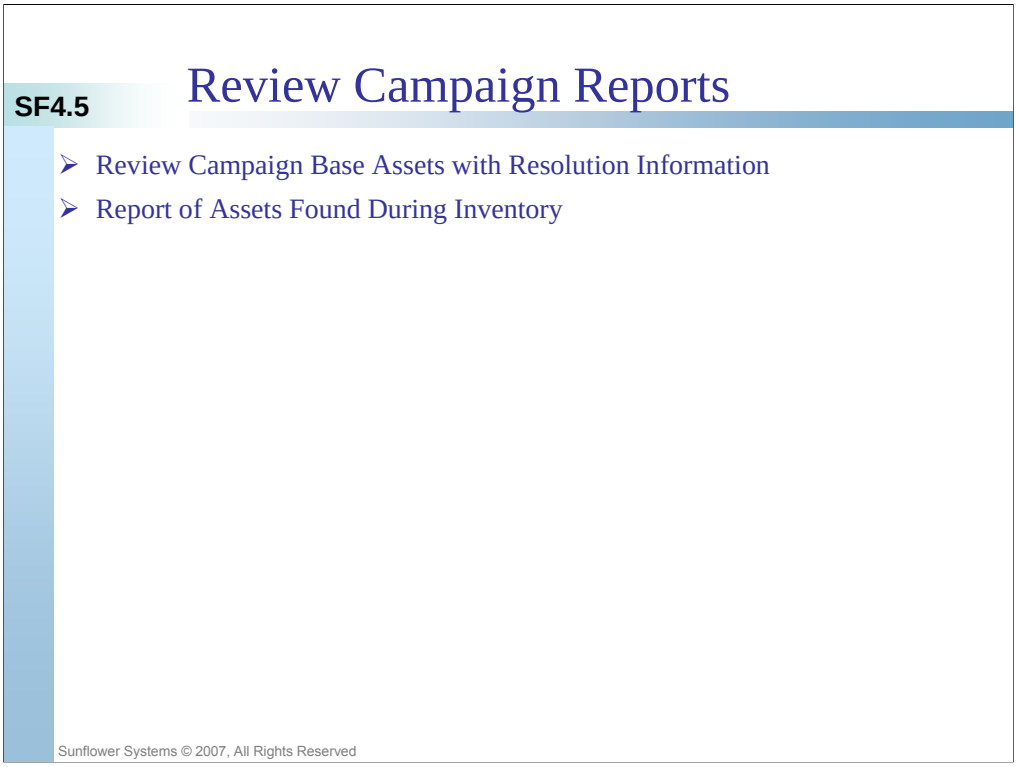


Check with your instructor to determine if scanners are available for conducting this Lab.



Review Campaign Base Assets with Resolution Information - review all base assets for the selected Review Campaign with open resolutions that were not found during the inventory to date

Inventory Asset Interface Processing Results – review all assets that were found during inventory. Run report based on Inventory plus the scanner identifier

SF4.5

Review Campaign Base Assets with Resolution Information

Sunflower Enterprise — Review Campaign Base Assets with Resolution Information — Page 2 of 4
ASRV6040 — 09/18/2006 16:33

Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
AGR XX01	S	COMPUTER PORTABLE	APPLE	M5555	1211212	$ 4,400.00	01/01/1995
Manager : SUNFLOWER SYSTEMS				Review Campaign : XE2006			
Owner : SUNFLOWER SYSTEMS				Resolution : ONLINE DECLARATIVE			
Steward : ASSET CENTER XX				Created by : TRAINER SYSTEM2 ADMXX		On : 09/18/2006	
Custodian : FRAZIER TIMOTHY M 050167				Authorized by : TRAINER SYSTEM2 ADMXX			
User :				Just. Level :			
Location : SAN FRANCISCO							
BUILDING : E2 ROOM : 1608							
FIN FXX40		COMPUTER PERSONAL	DELL	D333	401XX	$ 4,950.00	04/01/1996
Manager : SUNFLOWER SYSTEMS				Review Campaign : XE2006			
Owner : SUNFLOWER SYSTEMS				Resolution : ONLINE DECLARATIVE			
Steward : ASSET CENTER XX				Created by : TRAINER SYSTEM2 ADMXX		On : 09/18/2006	
Custodian : DOE JOHN 050598				Authorized by : SMITH SUSAN X SZXX			
User :				Just. Level : IP ADDRESS VERIFIED			
Location : LIVERMORE							
BUILDING : E ROOM : 1222							
INV XX02	S	COMPUTER PERSONAL	DELL	D333	221123W	$ 3,000.00	05/01/1998
Manager : SUNFLOWER SYSTEMS				Review Campaign : XE2006			
Owner : SUNFLOWER SYSTEMS				Resolution : ONLINE PHYSICAL			
Steward : ASSET CENTER XX				Created by : TRAINER SYSTEM2 ADMXX		On : 09/18/2006	
Custodian : FRAZIER TIMOTHY M 050167				Recorded by : SMITH SUSAN X SZXX			
User :				Location : SAN FRANCISCO			
Location : SAN FRANCISCO				BUILDING : G ROOM : 1234XX			
BUILDING : E2 ROOM : 16XX							
INV XX05		SEDAN	FORD MOTOR COMPANY TAURUS	222W		$ 26,000.00	01/01/1990
Manager : SUNFLOWER SYSTEMS				Review Campaign : XE2006			
Owner : SUNFLOWER SYSTEMS				Resolution : ONLINE PHYSICAL			
Steward : ASSET CENTER XX				Created by : TRAINER SYSTEM2 ADMXX		On : 09/18/2006	
Custodian : XX CUSTODIAN CUSTXX				Recorded by : TRAINER SYSTEM2 ADMXX			
User :				Location : LIVERMORE			
Location : LIVERMORE				BUILDING : G ROOM : 200			
BUILDING : F :							

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PMO/PAOs will run this report and hand it off to the PCs conducting the review campaign. The report identifies all assets not found and still requiring inventory. The PC will review the report and attempt to find the missing data by either using the scanner or completing an Online Resolution (explained in chapter 8).

PMO/PAO will run the report with the following information:

Review Campaign: Specify the Review Campaign name

Interest Type: select Inventory Assets

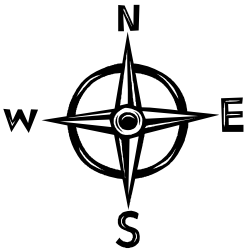
Resolution Type: Select Open

Group by: Custodial Area (so that you may give each custodial area their specific information).

Sort by: Location, Current User and Descriptives

SF4.5

NAV: Review Campaign Base Assets with Resolution Information



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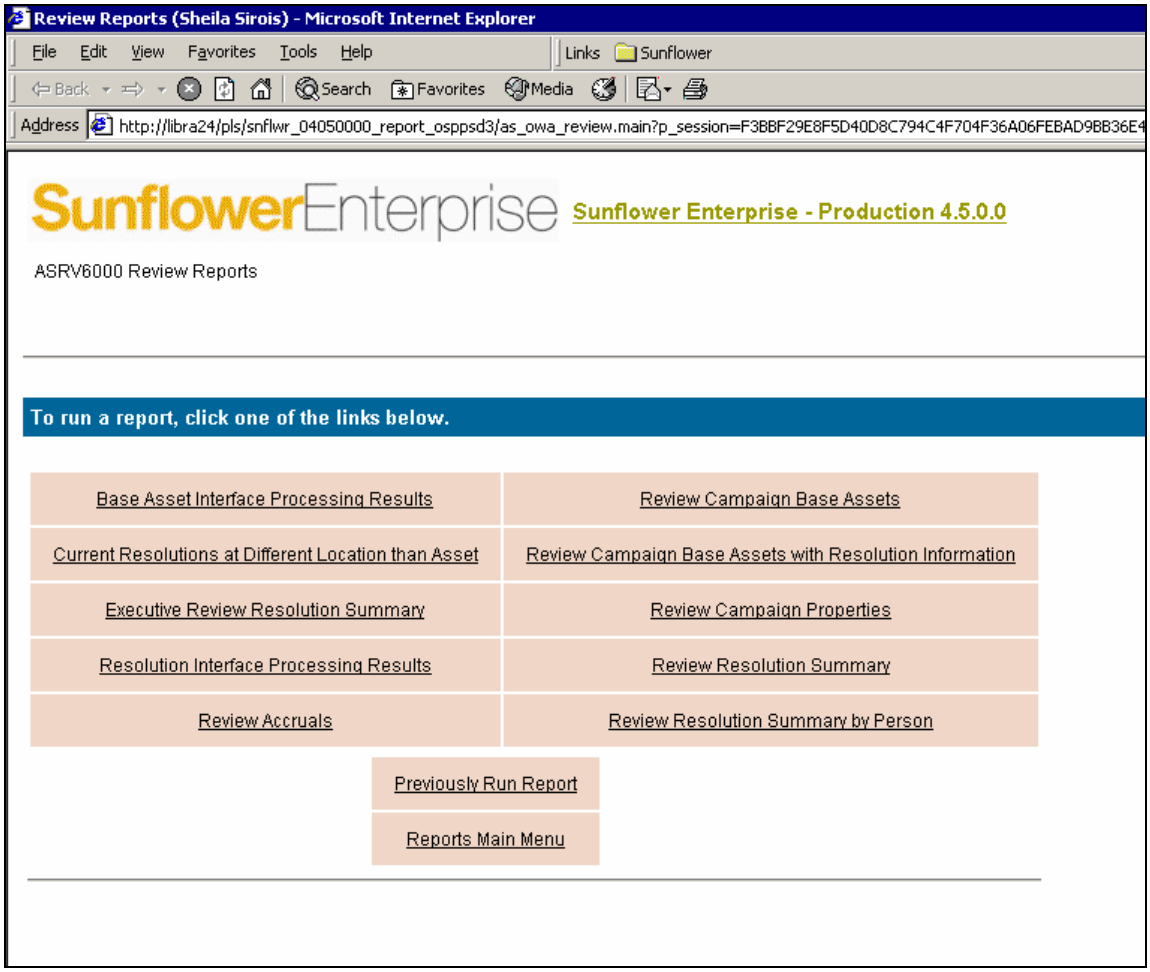
Review Campaign Base Assets with Resolution Information

Review Manager
M > Review> Review Reports
Review Reports



1. Select the **Review Campaign Base Assets with Resolution** link.

Result: The query criteria window is displayed.

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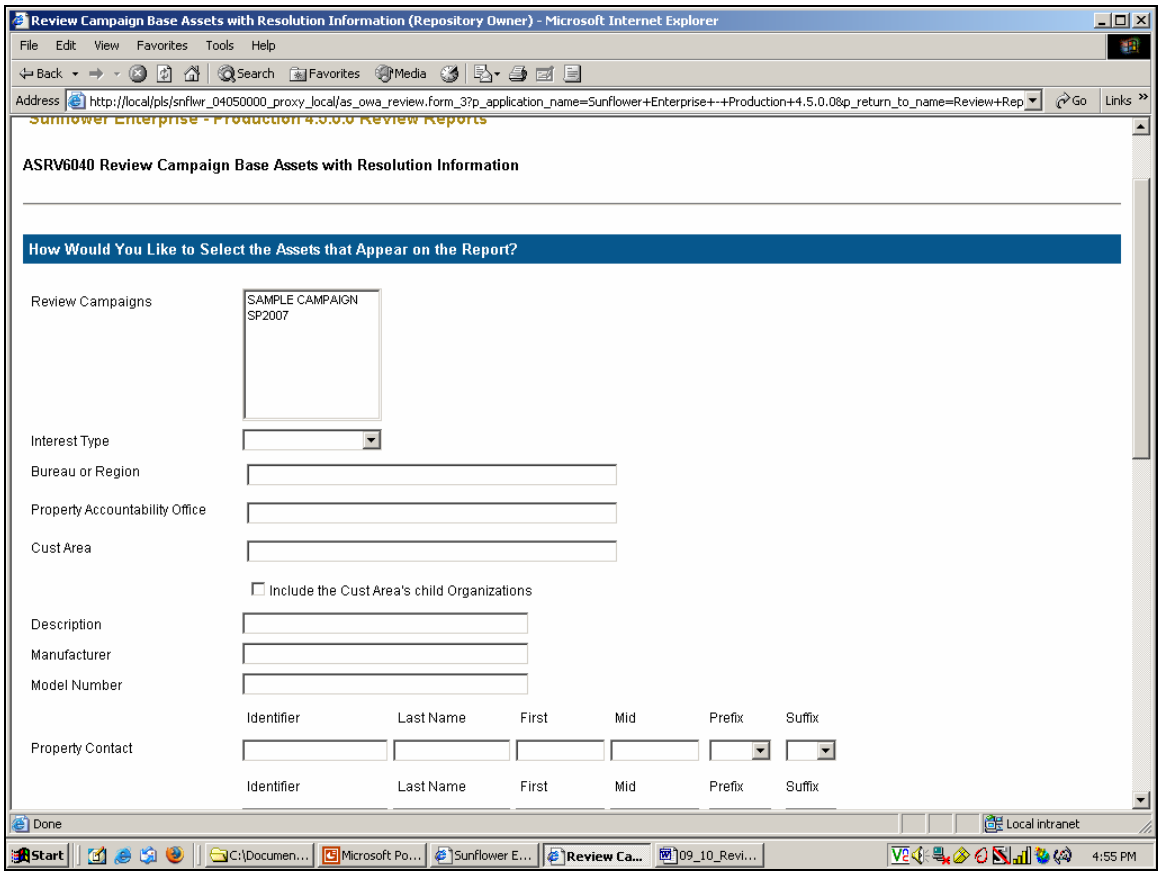

2. Select the Review Campaign in the **Review Campaign** field.

3. Select the **Interest Type** from the pull down menu on which to report.

4. Complete the remaining fields as desired.

5. Group the assets as you desire using the **How Would You Like the Assets to be Grouped?** pull down menu.

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

<u>Result:</u> The review screen appears.

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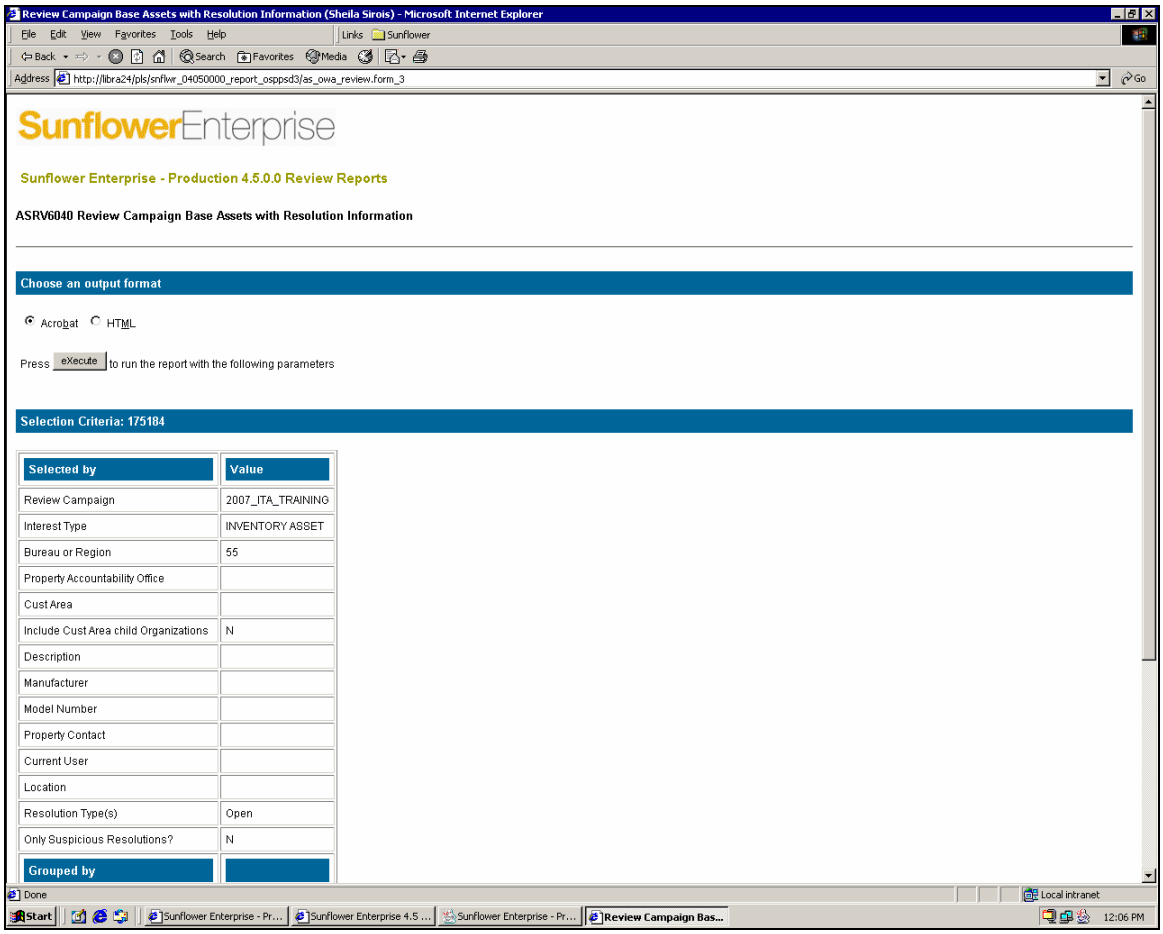

7. Select the **Acrobat** radio button.

8. Select the **eXecute** button to run the report.

Result: The report displays.

Below is a complete **Review Campaign Base Assets with Resolution Information** report:

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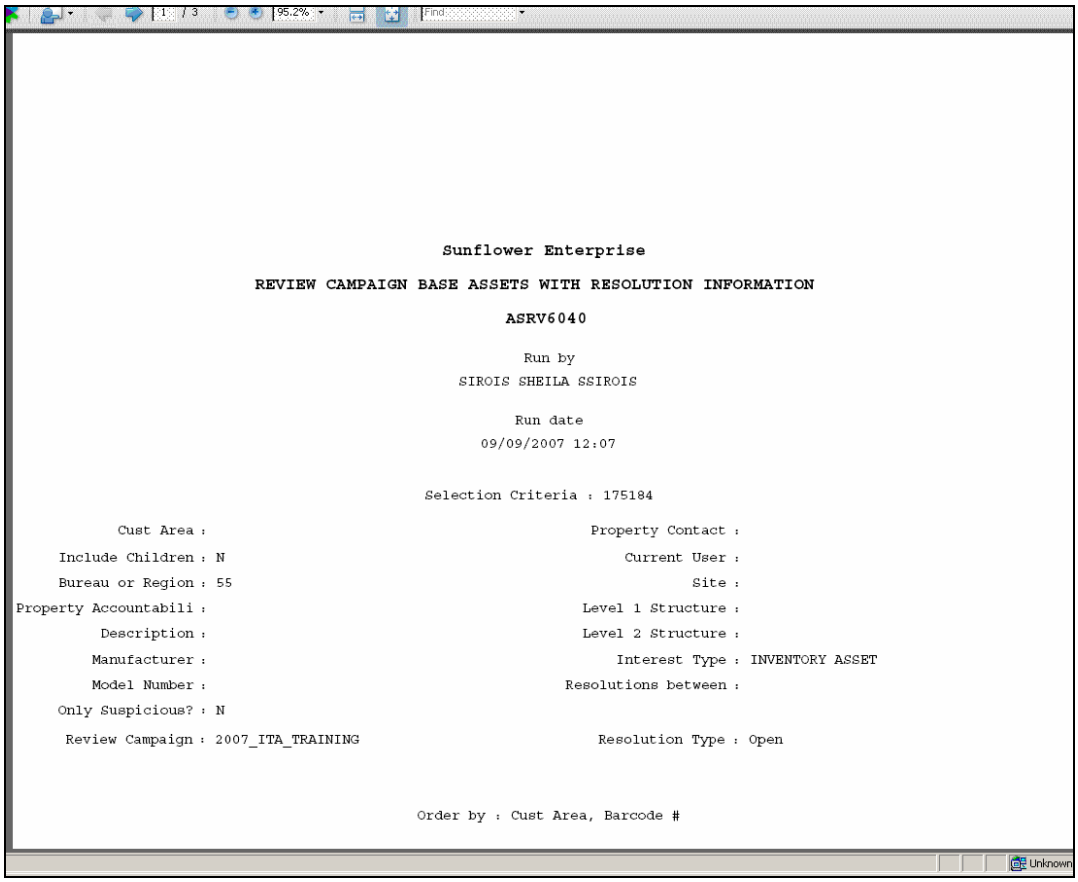

Sunflower Enterprise

REVIEW CAMPAIGN BASE ASSETS WITH RESOLUTION INFORMATION

ASRV6040

Run by
SIROIS SHEILA SSIROIS

Run date
09/09/2007 12:07

Selection Criteria : 175184

Cust Area :		Property Contact :	
Include Children :	N	Current User :	
Bureau or Region :	55	Site :	
Property Accountabili :		Level 1 Structure :	
Description :		Level 2 Structure :	
Manufacturer :		Interest Type :	INVENTORY ASSET
Model Number :		Resolutions between :	
Only Suspicious? :	N		
Review Campaign :	2007_ITA_TRAINING	Resolution Type :	Open

Order by : Cust Area, Barcode #

End of activity.

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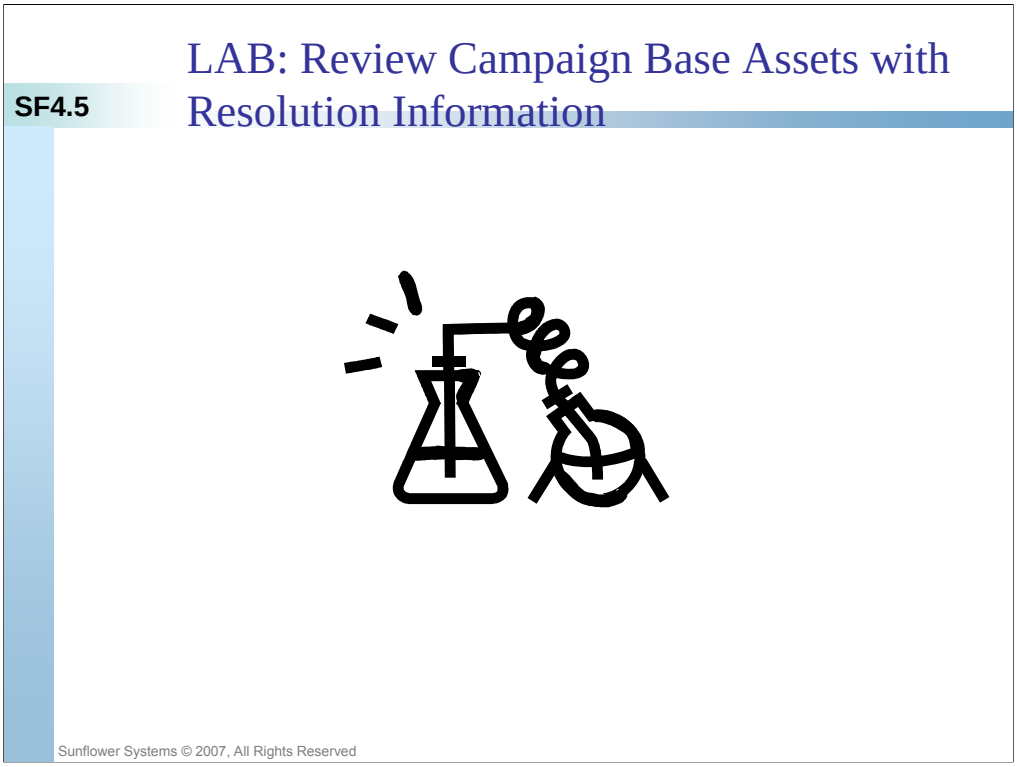
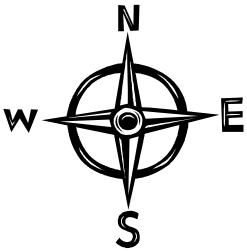


Run the report for the review campaign you created with the name **Student ID number + today's date** (e.g., Student0109152007).

SF4.5

NAV: Generate Report of Assets Found During Inventory



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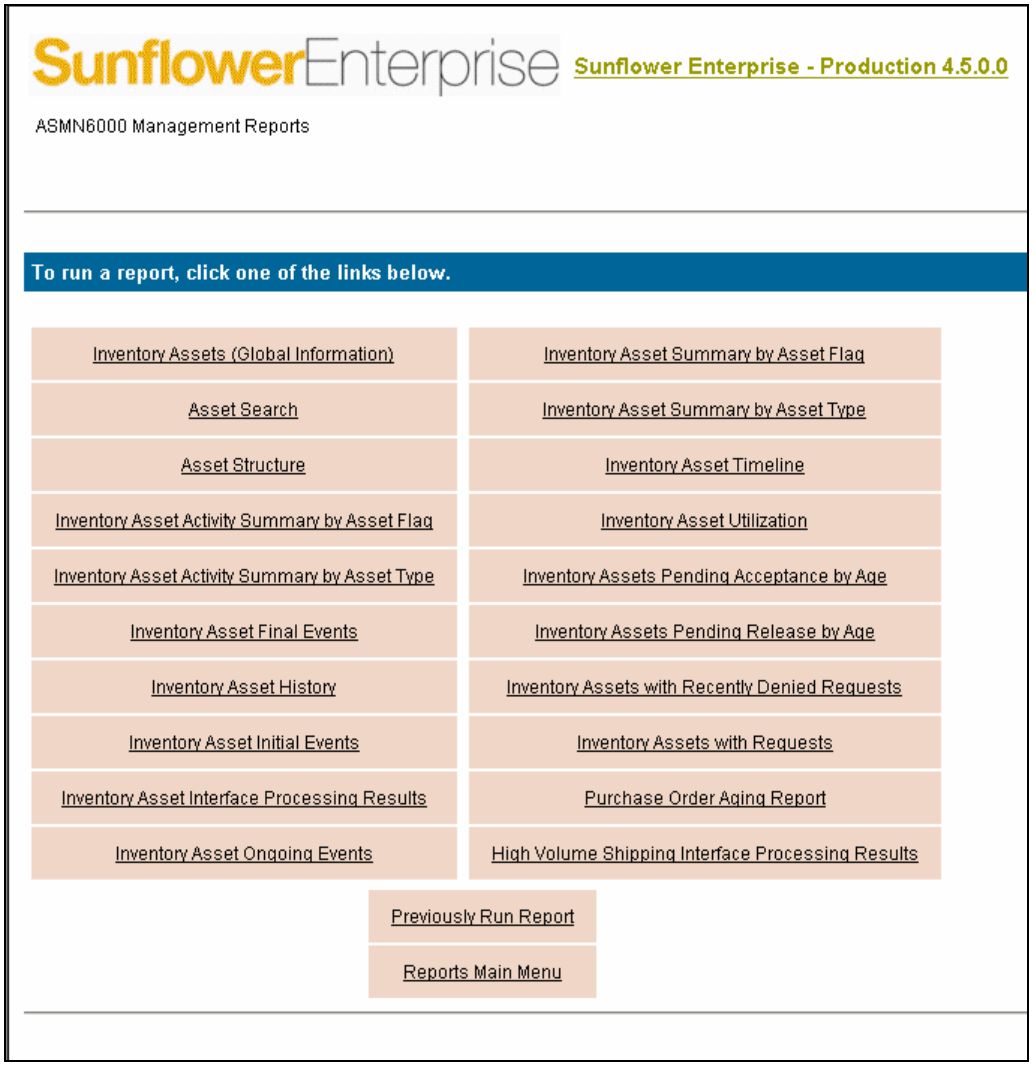
Generate Report of Assets Found During Inventory

Review Manager
M> Mgmt > Management Reports
Management Reports



1. Select **Inventory Asset Interface Processing Results**.

Result: The **Inventory Asset Interface Processing Results** parameters window displays:

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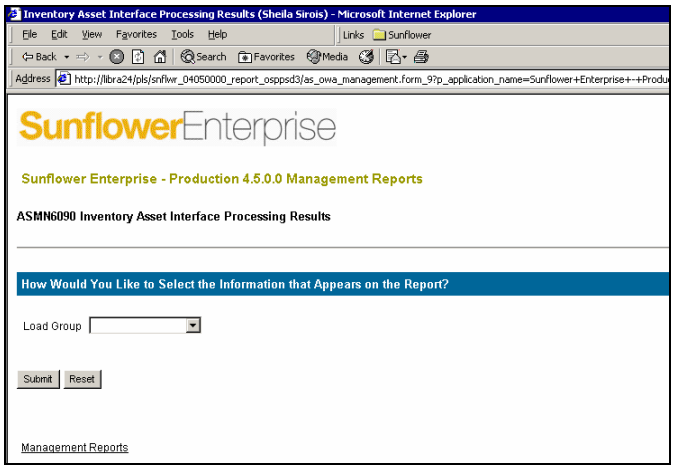
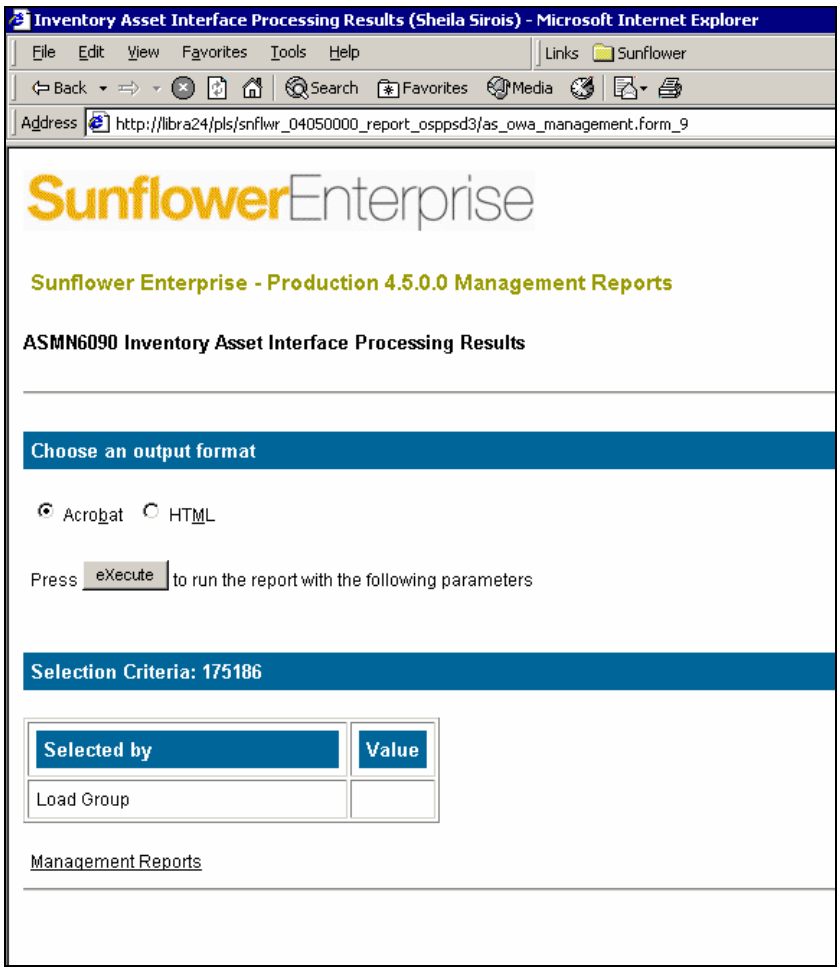


2. In the **Load Group LOV**, select the Load Group number.

3. Select **Submit**.

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



4. Select the **Acrobat** radio button.

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5. Select **eXecute**.

Result: The report displays in a separate window, allowing you to review the results of the inventory asset interface processing:

Sunflower Assets — Inventory Asset Interface Processing Results — Page 2 of 4
ASMN6090 — 11/15/2005 18:58

Load Group : INV0000000001

Record Group	Date	Result
Success Total	0	

Record Group	Date	Result
11-1051102103928	11/02/2005 11:28:44	AS-01125: Identifier 7.1.1.STEP11-1 also appears on source_record_group 11-1051102105447 (Identifier:7.1.1.STEP11-1 Site:CAMPUS Stlvl 1:BUILDING 10 Stlvl 2:ROOM 123 Stlvl 3:)
11-1051102105447	11/02/2005 11:28:45	AS-01125: Identifier 7.1.1.STEP11-1 also appears on source_record_group 11-1051102103928 (Identifier:7.1.1.STEP11-1 Site:CAMPUS Stlvl 1:BUILDING 10 Stlvl 2:ROOM 123 Stlvl 3:)
11-2051029101316	11/02/2005 11:28:44	SA-00107: ASSET_EVENT_TYPE_ID of AS_ASSET_EVENT cannot be NULL (Identifier:7.1.1.STEP11-2 Site:BETHES Stlvl 1:BUILDING TDP Stlvl 2:ROOM 1034 Stlvl 3:)
12-1051102104211	11/02/2005 11:28:44	SA-00107: ASSET_EVENT_TYPE_ID of AS_ASSET_EVENT cannot be NULL (Identifier:7.1.1.STEP12-1 Site:CAMPUS Stlvl 1:BUILDING 10 Stlvl 2:ROOM 123 Stlvl 3:)
12-2051029101456	11/02/2005 11:28:44	SA-00107: ASSET_EVENT_TYPE_ID of AS_ASSET_EVENT cannot be NULL (Identifier:7.1.1.STEP12-2 Site:BETHES Stlvl 1:BUILDING TDP Stlvl 2:ROOM 1034 Stlvl 3:)
16-1051102110021	11/02/2005 11:28:45	SA-00107: ASSET_EVENT_TYPE_ID of AS_ASSET_EVENT cannot be NULL (Identifier:7.1.1.STEP16-1 Site:CAMPUS Stlvl 1:BUILDING 10 Stlvl 2:ROOM 123 Stlvl 3:)
16-2051029102230	11/02/2005 11:28:44	SA-00107: ASSET_EVENT_TYPE_ID of AS_ASSET_EVENT cannot be NULL (Identifier:7.1.1.STEP16-2 Site:BETHES Stlvl 1:BUILDING TDP Stlvl 2:ROOM 1034 Stlvl 3:)
CAP2051029102048	11/02/2005 11:28:44	SA-00107: ASSET_EVENT_TYPE_ID of AS_ASSET_EVENT cannot be NULL (Identifier:6222JSPCAP2 Site:BETHES Stlvl 1:BUILDING TDP Stlvl 2:ROOM 1034 Stlvl 3:)
SFNC051029101659	11/02/2005 11:28:44	SA-00107: ASSET_EVENT_TYPE_ID of AS_ASSET_EVENT cannot be NULL (Identifier:6217JSFNC Site:BETHES Stlvl 1:BUILDING TDP Stlvl 2:ROOM 1034 Stlvl 3:)
TEST051102105026	11/02/2005 11:28:44	SA-00107: ASSET_EVENT_TYPE_ID of AS_ASSET_EVENT cannot be NULL (Identifier:6218JSFTEST Site:CAMPUS Stlvl 1:BUILDING 10 Stlvl 2:ROOM 123 Stlvl 3:)
Failure Total	10	
Load Group Total	10	

- The first group shows the found inventory assets that were created successfully.
- The second group shows the failed inventory asset records that could not be created due to some error.

Note: If a failed interface record has the following error message:

SA-00107: ASSET_EVENT_TYPE_ID of AS_ASSET_EVENT cannot be NULL

Then assume that the asset failed to get created either because
- it is an overage asset OR
- it is an existing capital asset.

End of activity.

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SF4.5

Campaign Certification

- Letter to PC
- Includes number of assets found
- Includes number of assets missing
- PC reviews and verifies information and signs certification

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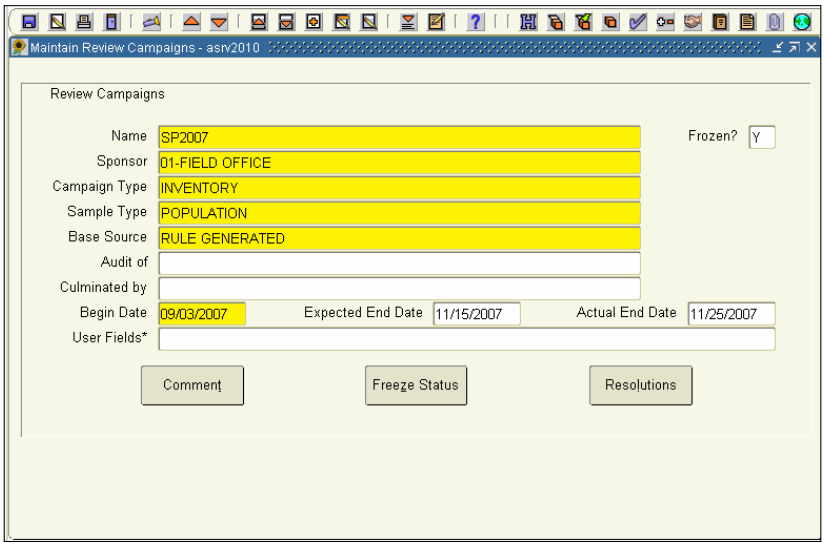
SF4.5

Closing Review Campaigns



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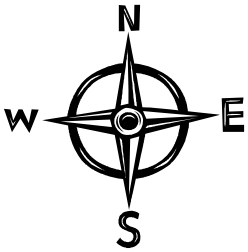
Closing a campaign is the final step in the review cycle. This occurs after all assets in your baseline have been accounted for, outstanding assets have been declared, and the report of survey is reconciled.

To end the review campaign, specify the **Actual End Date**. This date may be equal to, earlier or later than the Expected End Date.

Closing a Review Campaign does not prohibit an asset from being inventoried after the end of the campaign. If an asset is found after the review campaign closes, the PC may still use the online resolution form to inventory the asset.

NAV: Close Review Campaigns

SF4.5



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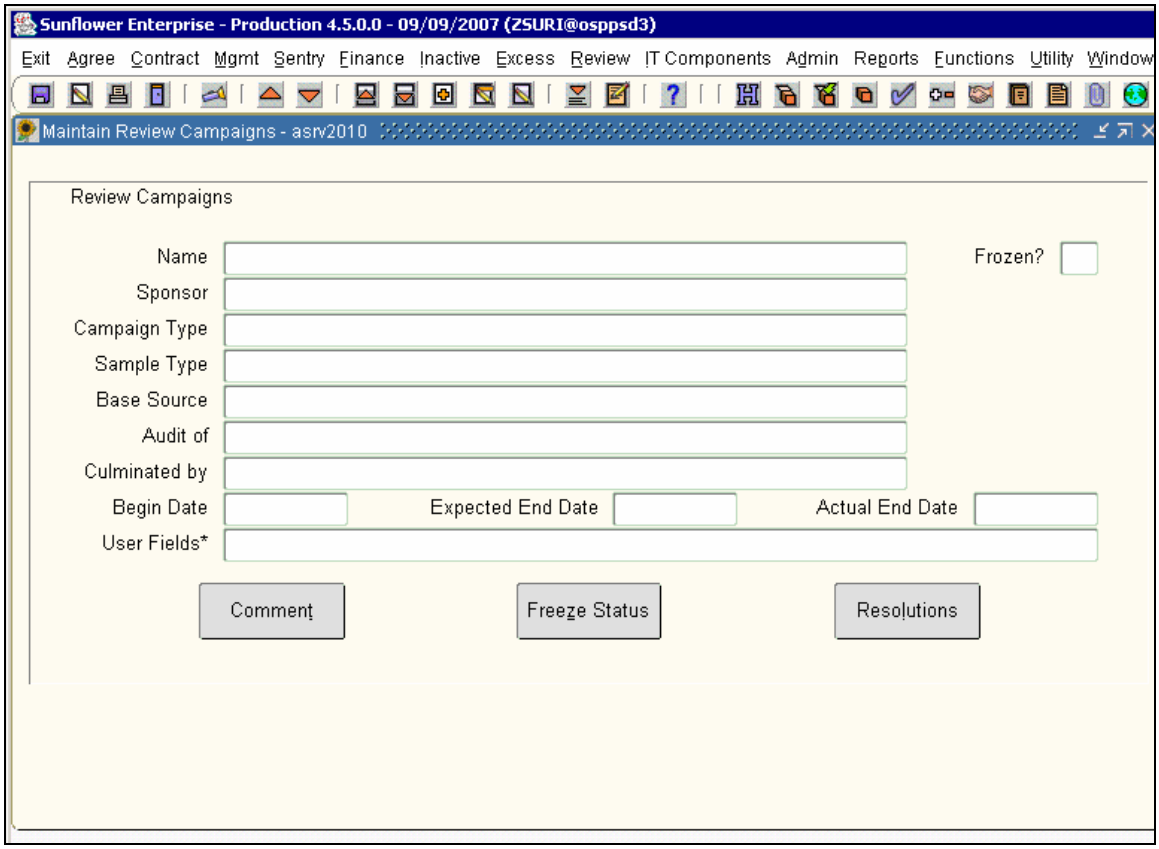
Close Review Campaigns

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



1. Select the **Find** icon from the toolbar.
2. Enter the Review Campaign Name in the **Name** field that you want to close.
3. Select the **Find** icon from the toolbar.

Result: The screen populates.

4. Enter the closing date in the **Actual End Date** field.
5. Select the **Save** icon from the toolbar to close the Review Campaign.

Result: The Review Campaign will be closed.

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

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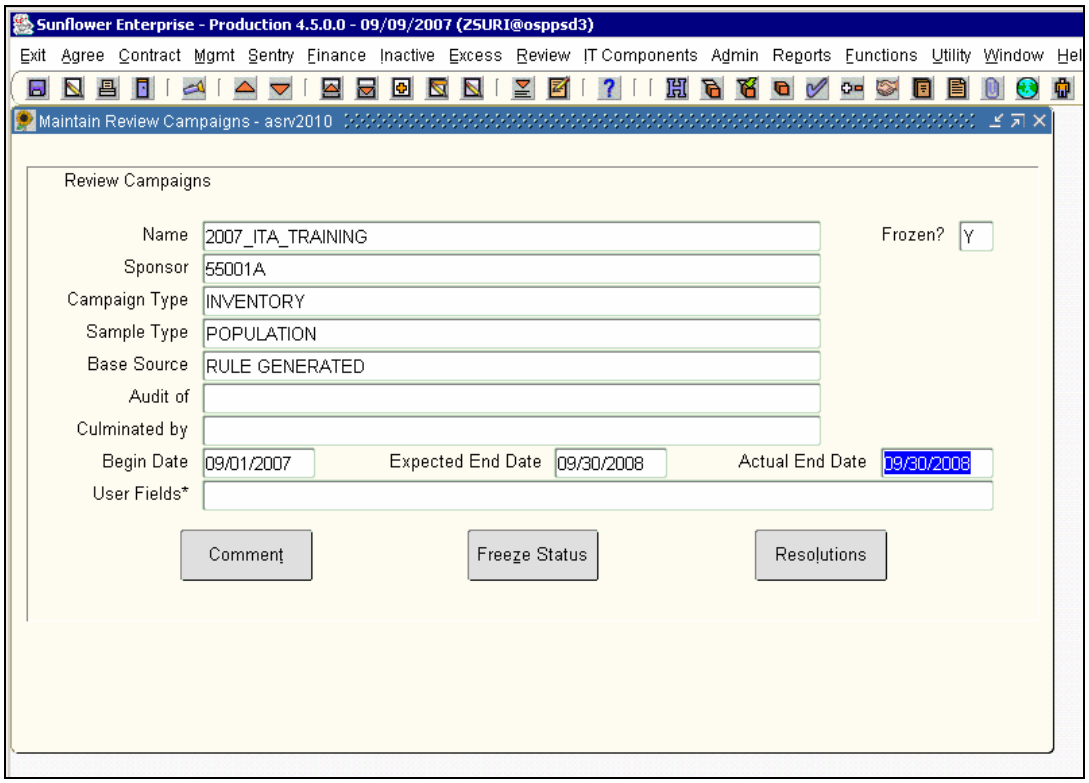

End of activity.

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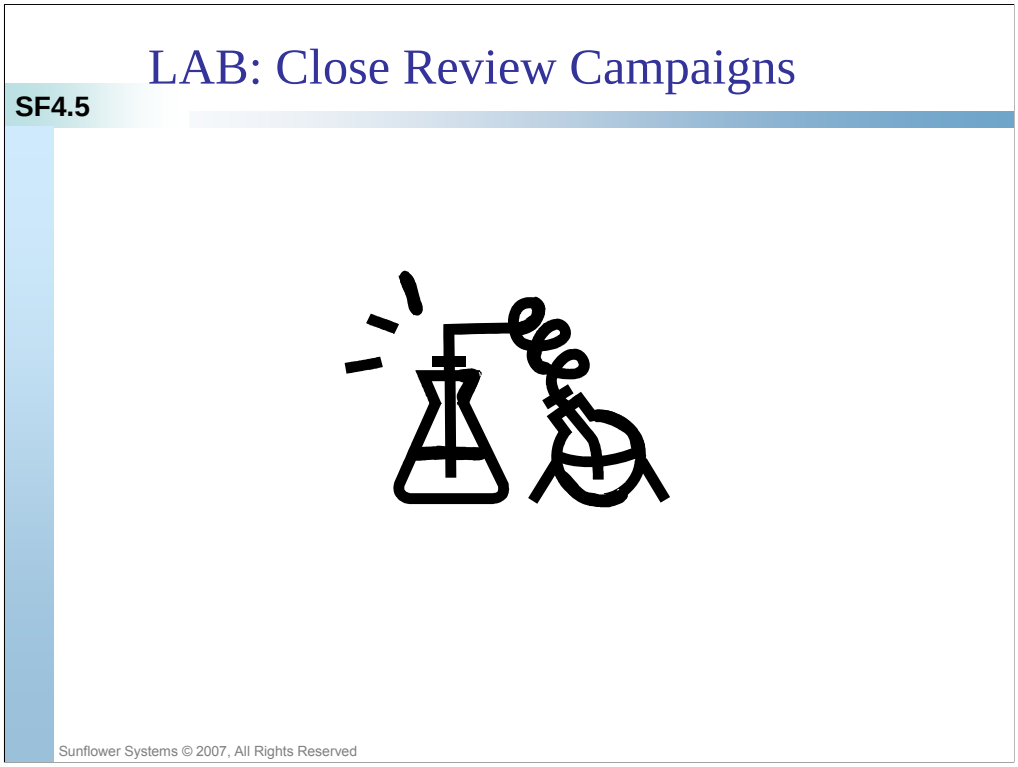
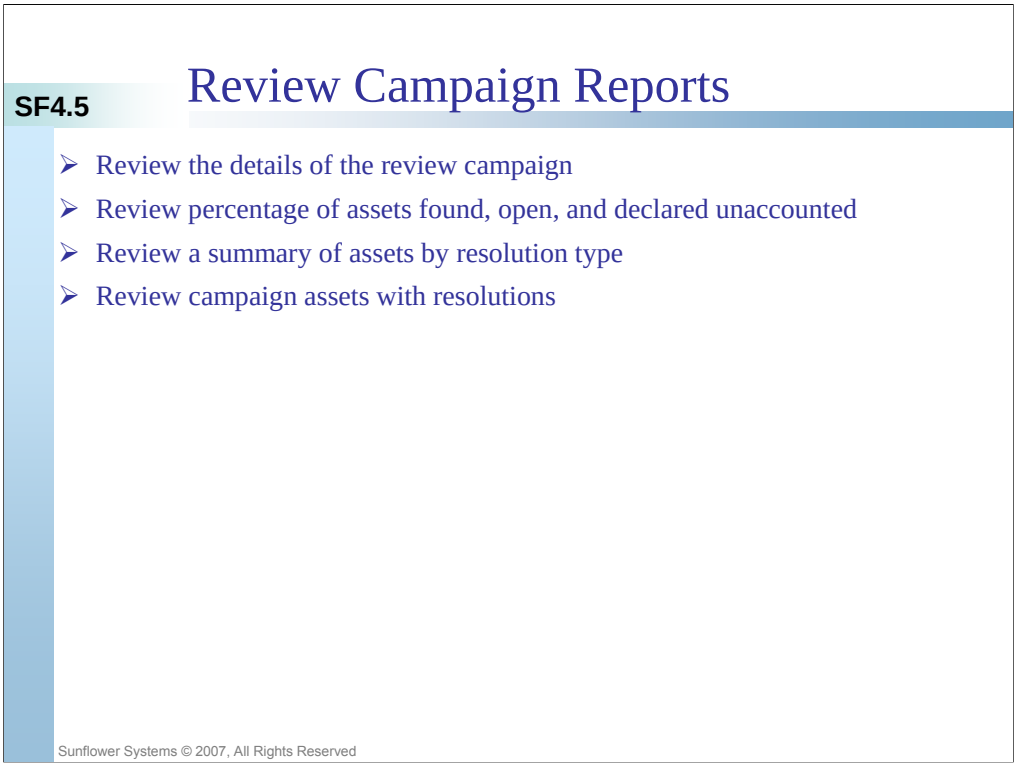


Complete this lab <u>AFTER</u> you have completed all the labs in Chapter 8: Conduct a Review Campaign (PC)

Close the review campaign that you created with the name **Student ID number + today's date** (e.g., Student0109152007).

Enter the closing date of 11/30/2007.

(Note: Typically you would not enter the actual end date until that date. However for the purposes of training, we will leave the review campaign open until after all classes so that PCs may complete the labs in Chapter 8 in later training sessions.)



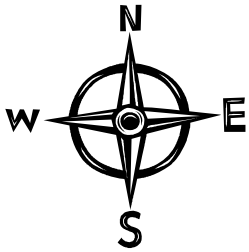
Running reports at the end of a review campaign will list all assets included in the campaign and their status.

- Review Campaign Properties – displays details of the campaign parameters, (e.g., setup, base rules, and valid resolution types)
- Review Resolution Summary – displays open and found assets and how they were found
- Executive Review Resolution Summary – summary of the progress of your review campaign and status
- Review Campaign Base Assets with Resolution Information – check the box to include suspicious resolutions to view assets that were retired (the steps for this report are included earlier in the chapter)

The NAVs are included as a reference for the reports listed above.

NAV: Review Campaign Properties

SF4.5



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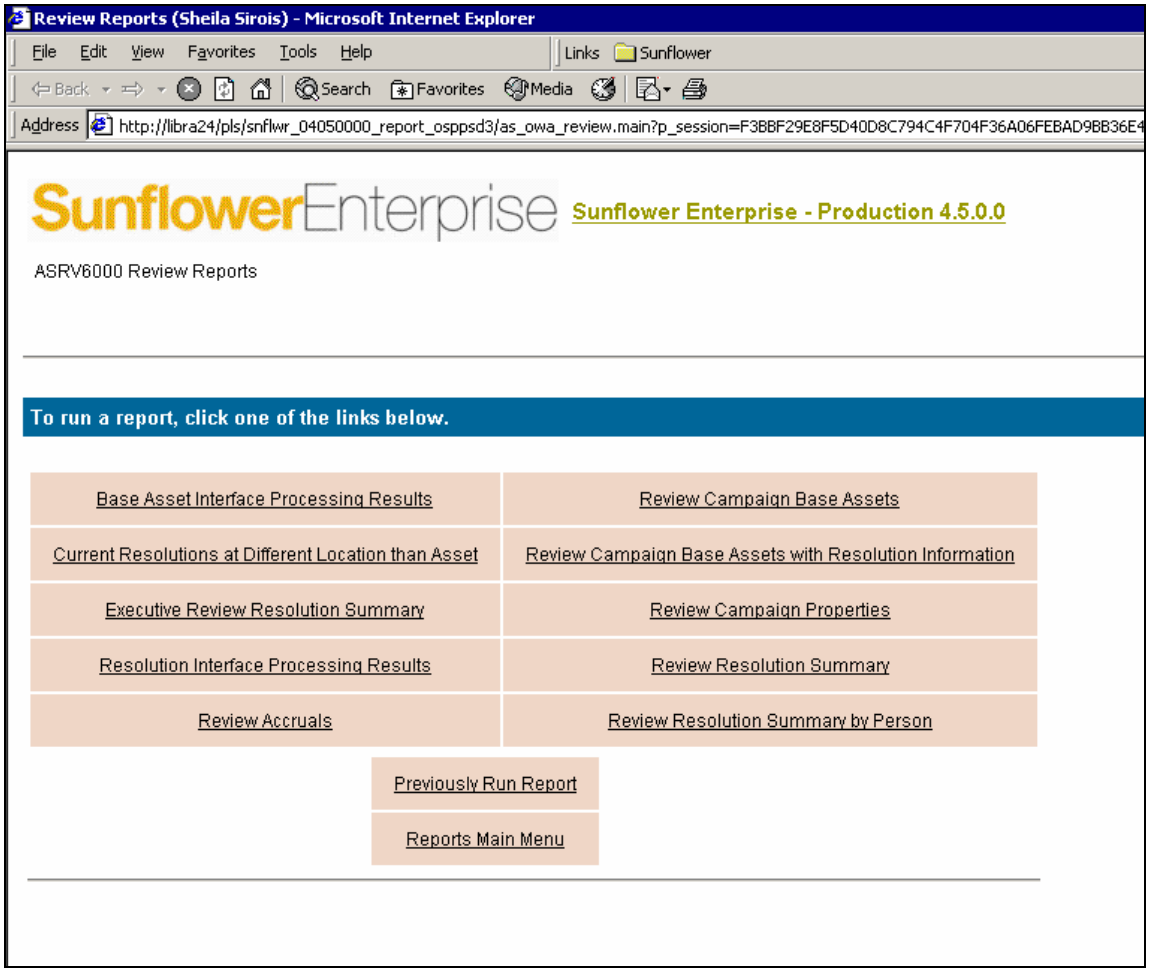
Review Campaign Properties

Review Manager
M > Review> Review Reports
Review Reports



1. Select the **Review Campaign Properties** link.

Result: The query criteria window is displayed.

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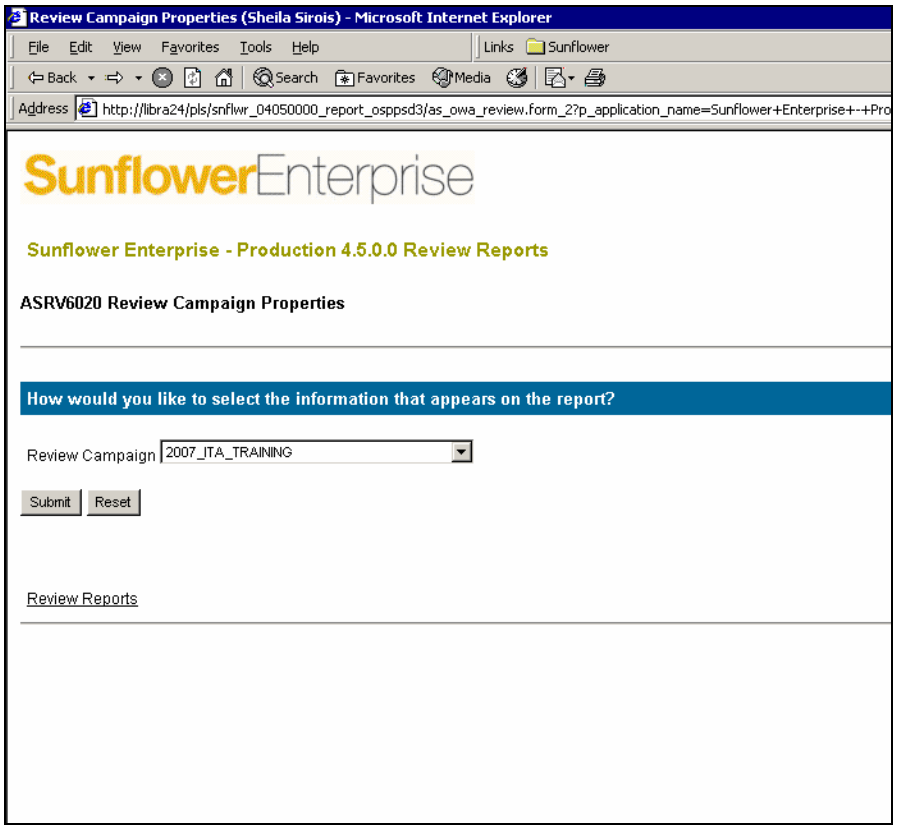

2. Select the Review Campaign in the **Review Campaign** field

3. Select the **Submit** button.

<u>Result:</u> The review screen appears.

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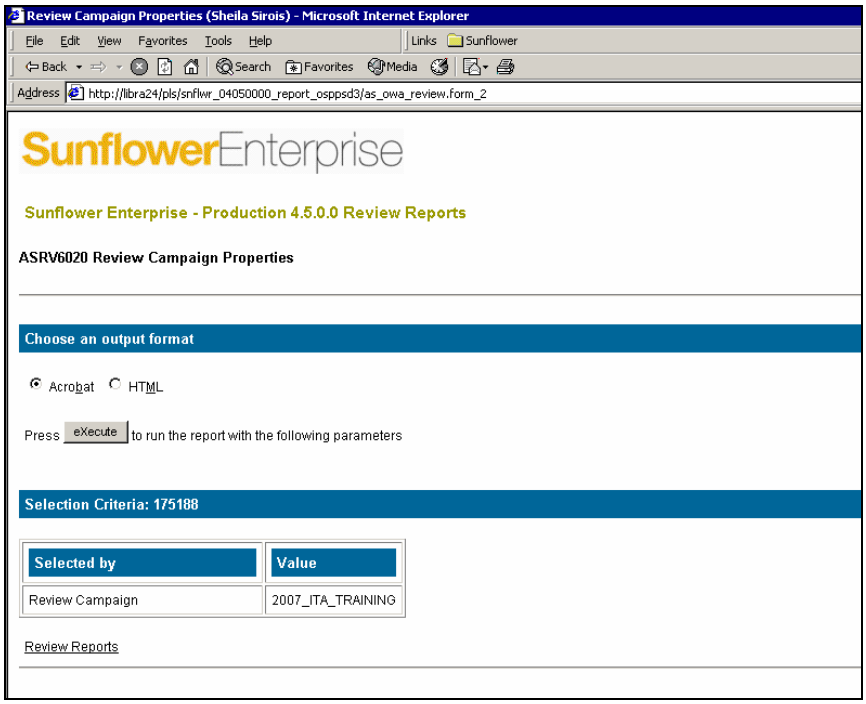

4. Select the **Acrobat** radio button.

5. Select the **eXecute** button to run the report.

Result: The report displays.

Below is a complete **Review Campaign Properties** report:

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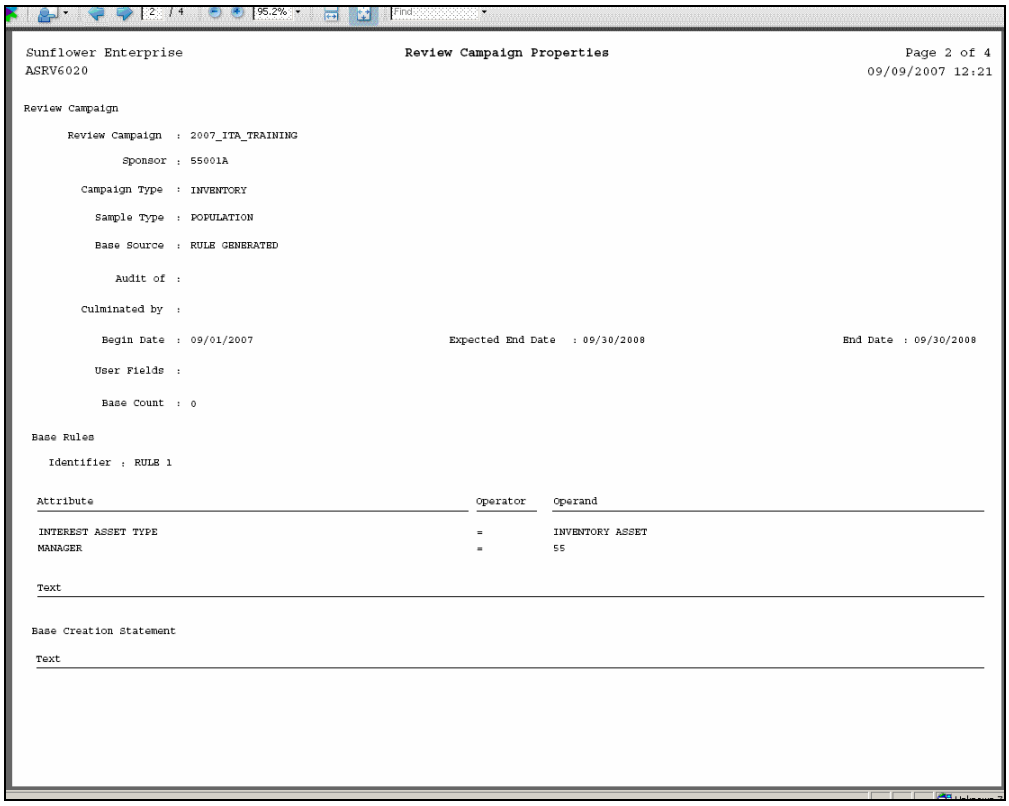

Sunflower Enterprise
ASRV6020

Review Campaign Properties

Page 2 of 4
09/09/2007 12:21

Review Campaign

Review Campaign : 2007_ITA_TRAINING
Sponsor : 55001A
Campaign Type : INVENTORY
Sample Type : POPULATION
Base Source : RULE GENERATED
Audit of :
Culminated by :
Begin Date : 09/01/2007 Expected End Date : 09/30/2008 End Date : 09/30/2008
User Fields :
Base Count : 0

Base Rules

Identifier : RULE 1

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

Text

Base Creation Statement

Text

End of activity.

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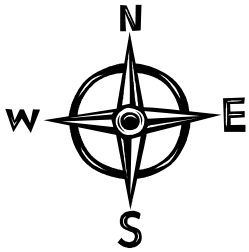
NAV: Review Resolution Summary

SF4.5



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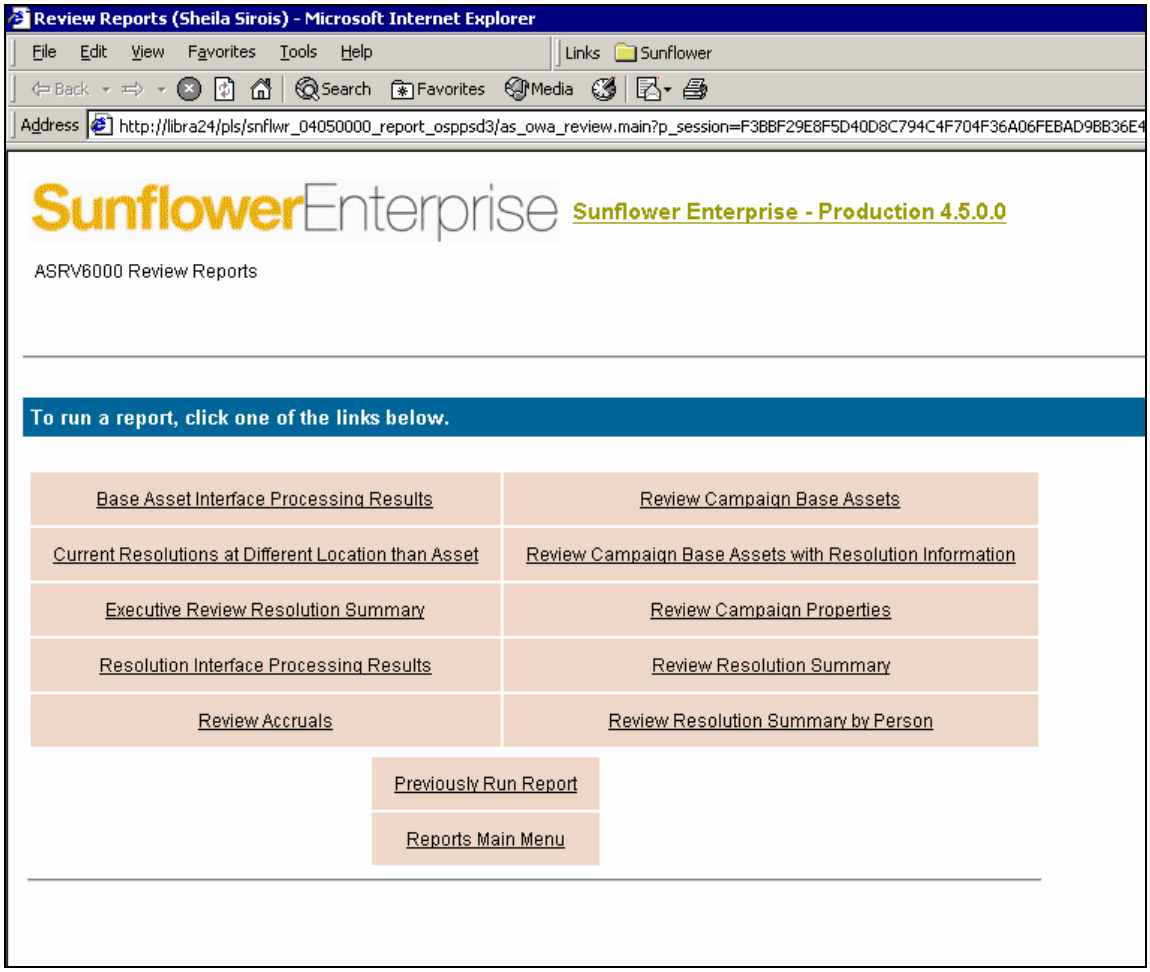
Review Resolution Summary

Review Manager
M > Review> Review Reports
Review Reports



1. Select the **Review Resolution Summary** link.

Result: The query criteria window is displayed.

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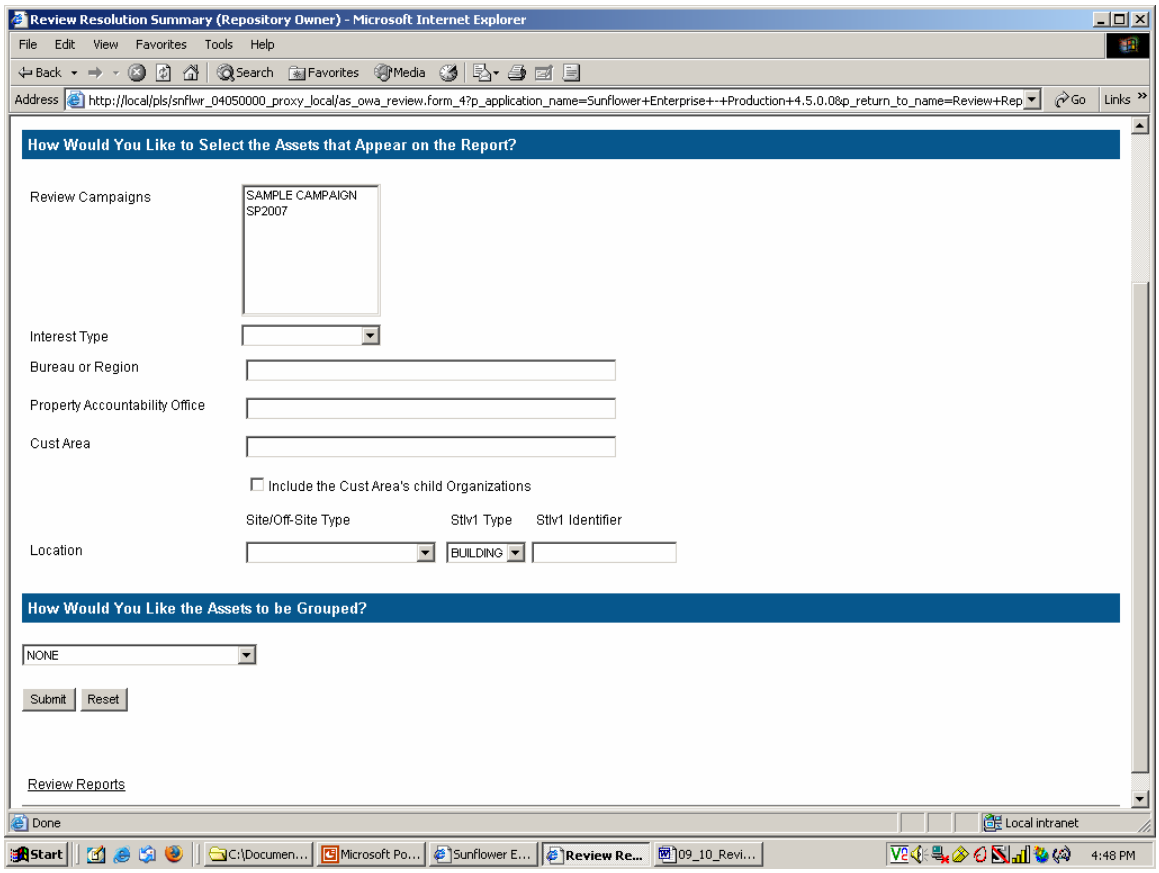

2. Select the Review Campaign in the **Review Campaign** field.

3. Select the **Interest Type** from the pull down menu on which to report.

4. Complete the remaining fields as desired.

5. Group the assets as you desire using the **How Would You Like the Assets to be Grouped?** pull down menu.

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

Result: The review screen appears.

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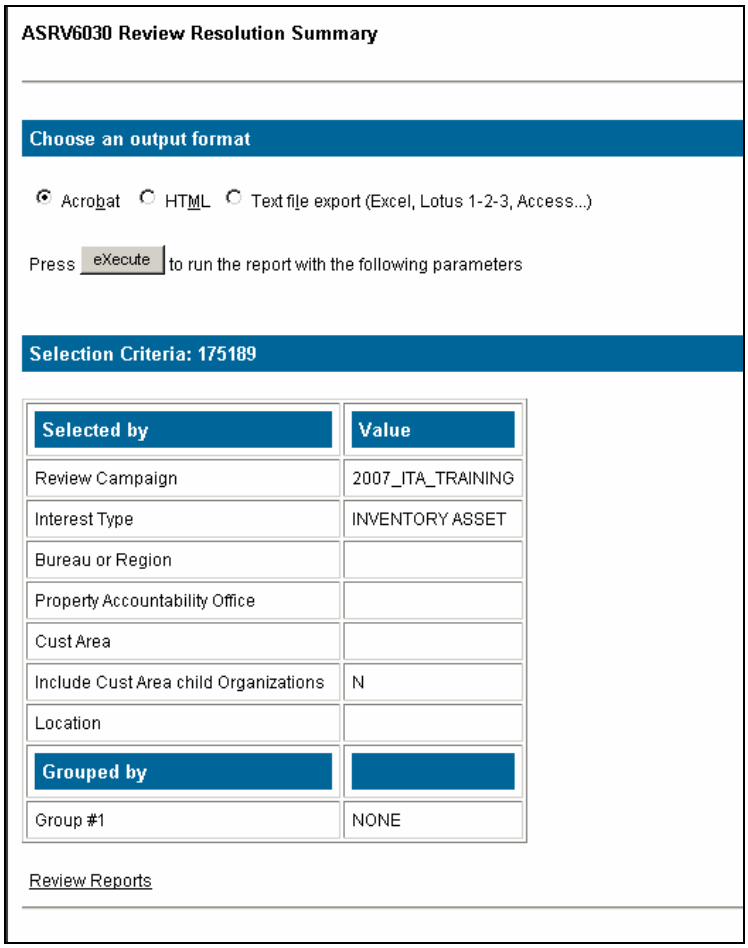

ASRV6030 Review Resolution Summary

Choose an output format

Acrobat HTML Text file export (Excel, Lotus 1-2-3, Access...)

Press eXecute to run the report with the following parameters

Selection Criteria: 175189

Selected by	Value
Review Campaign	2007_ITA_TRAINING
Interest Type	INVENTORY ASSET
Bureau or Region	
Property Accountability Office	
Cust Area	
Include Cust Area child Organizations	N
Location	
Grouped by	
Group #1	NONE

Review Reports

7. Select the **Acrobat** radio button.
8. Select the **execute** button to run the report.

Result: The report displays.

Below is a cover sheet of the **Review Resolution Summary** report:

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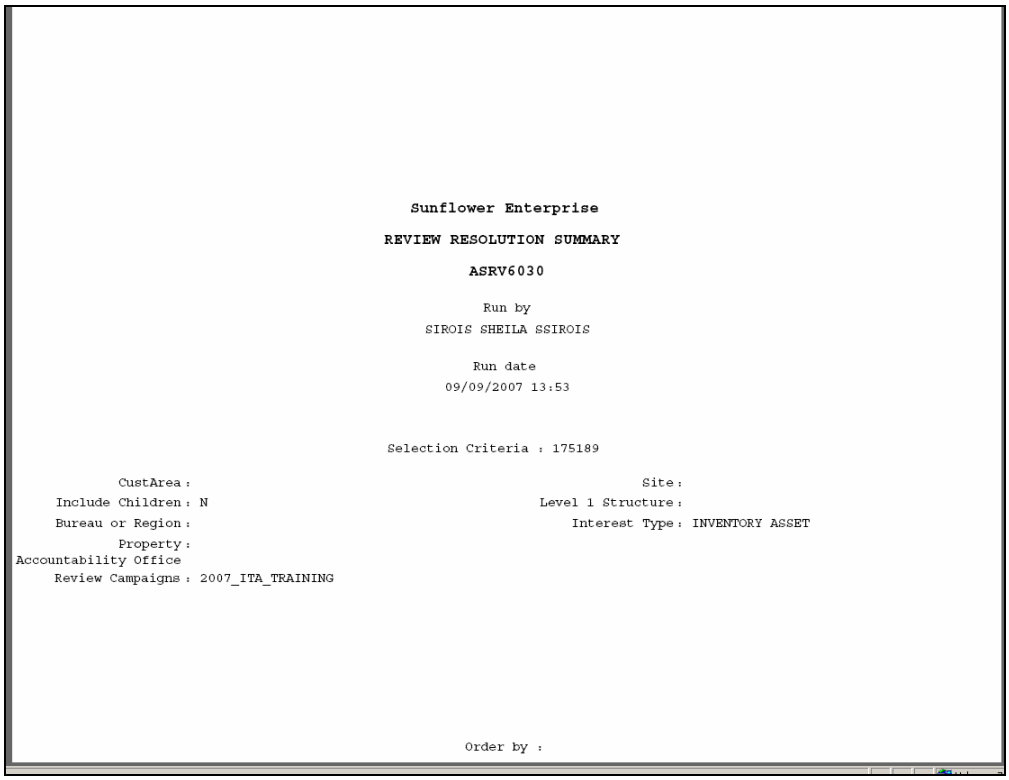

Sunflower Enterprise

REVIEW RESOLUTION SUMMARY

ASRV6030

Run by
SIROIS SHEILA SSIROIS

Run date
09/09/2007 13:53

Selection Criteria : 175189

CustArea :
Site :
Include Children : N
Level 1 Structure :
Bureau or Region :
Interest Type : INVENTORY ASSET
Property :
Accountability Office
Review Campaigns : 2007_ITA_TRAINING

Order by :

End of activity.

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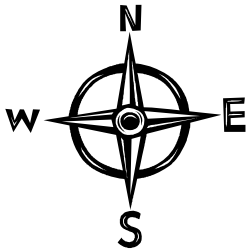
NAV: Executive Review Resolution

SF4.5



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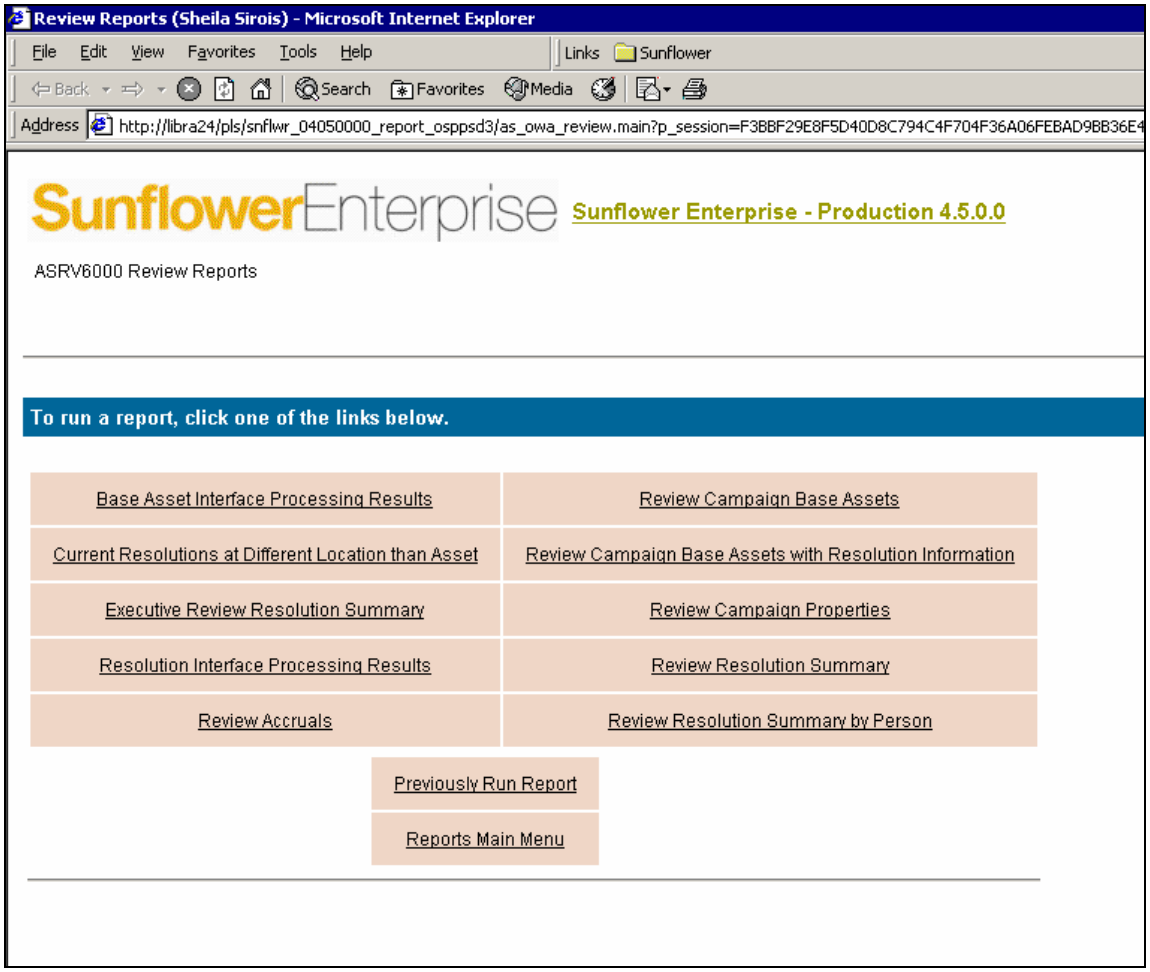
Executive Review Resolution

Review Manager
M > Review> Review Reports
Review Reports



1. Select the **Executive Review Resolution Summary** link.

Result: The query criteria window is displayed.

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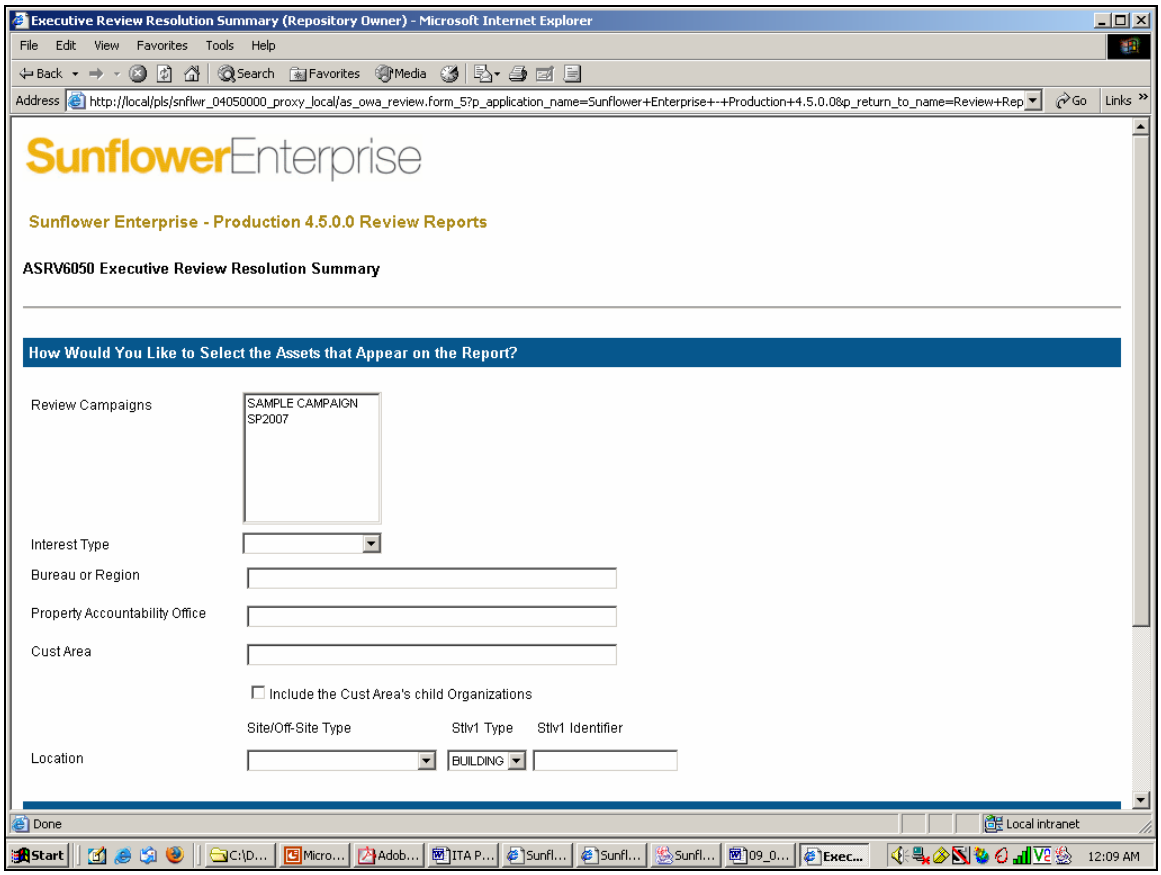

2. Select the Review Campaign in the **Review Campaign** field
3. Select the **Interest Type** from the pull down menu on which to report.
4. Complete the remaining fields as desired.
5. Group the assets as you desire using the **How Would You Like the Assets to be Grouped?** pull down menu.
6. Select the **Submit** button to run the report.

<u>Result:</u> The review screen appears.

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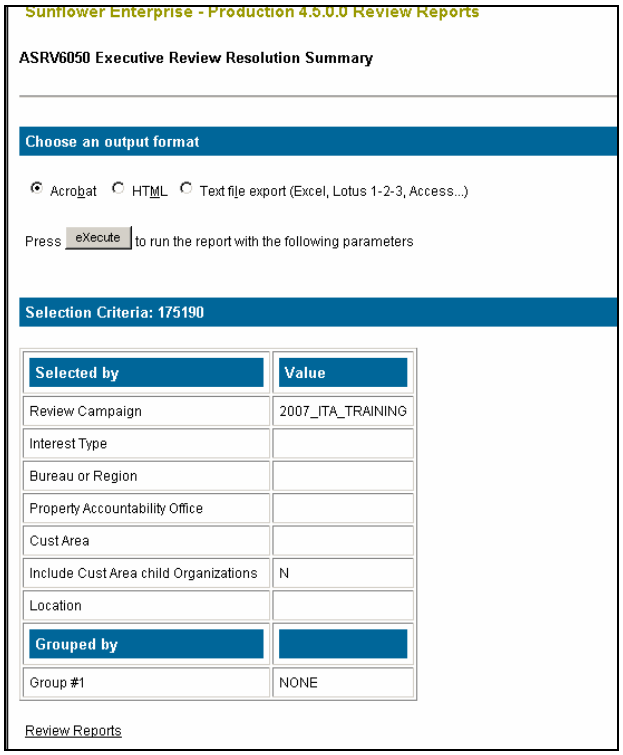

7. Select the **Acrobat** radio button.

8. Select the **execute** button to run the report.

Result: The report displays.

Below is a cover page of the **Executive Review Resolution** report:

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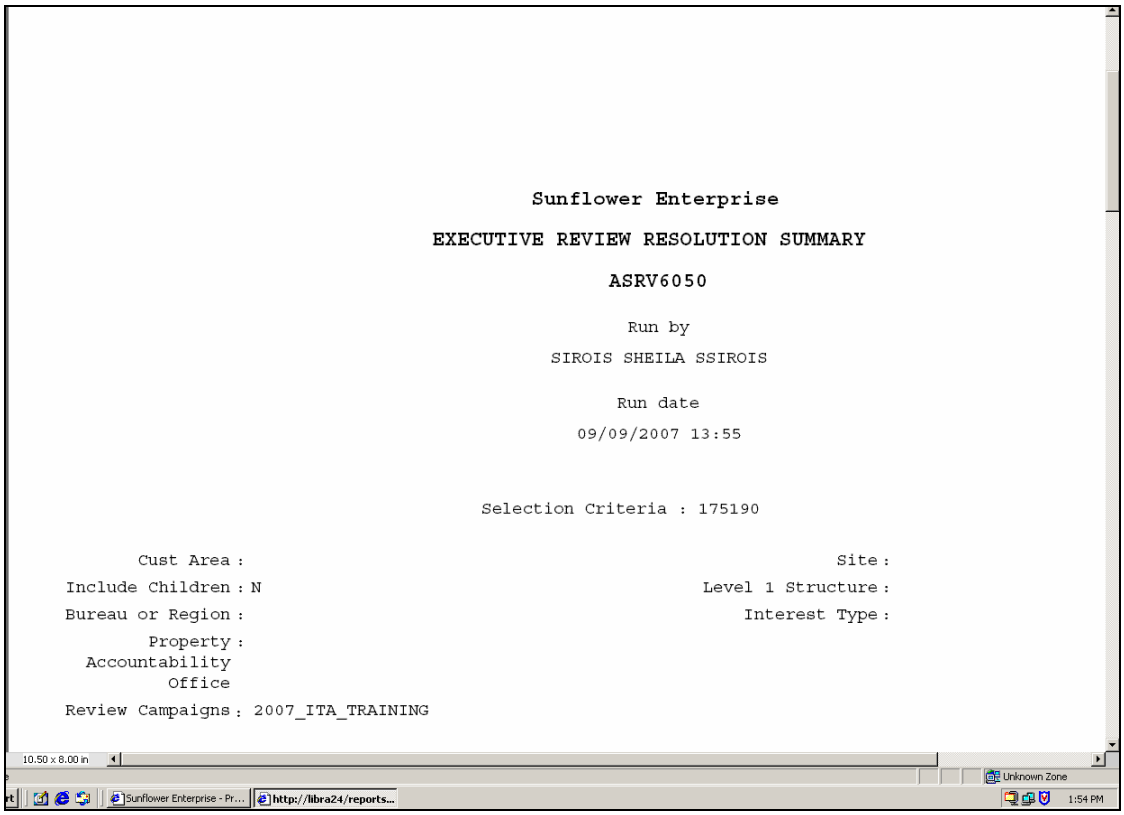

Sunflower Enterprise

EXECUTIVE REVIEW RESOLUTION SUMMARY

ASRV6050

Run by

SIROIS SHEILA SSIROIS

Run date

09/09/2007 13:55

Selection Criteria : 175190

Cust Area :

Site :

Include Children : N

Level 1 Structure :

Bureau or Region :

Interest Type :

Property :

Accountability Office

Review Campaigns : 2007_ITA_TRAINING

End of activity.

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SF4.5

Lesson Summary

You should now be able to:

- Define Roles involved in a review campaign
- Set up a review campaign
- Use MobileTrak to upload data to scanners
- Use MobileTrak to download data to Sunflower
- Run reports to review campaign details and status
- Close a review campaign

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SF4.5

Chapter 8:
Conduct a Review Campaign (PC)

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SF4.5

Lesson Objectives

After this lesson you should be able to:

- Use MobileTrak to create resolutions
- Use Online Forms to create resolutions
- Resolve outstanding resolutions

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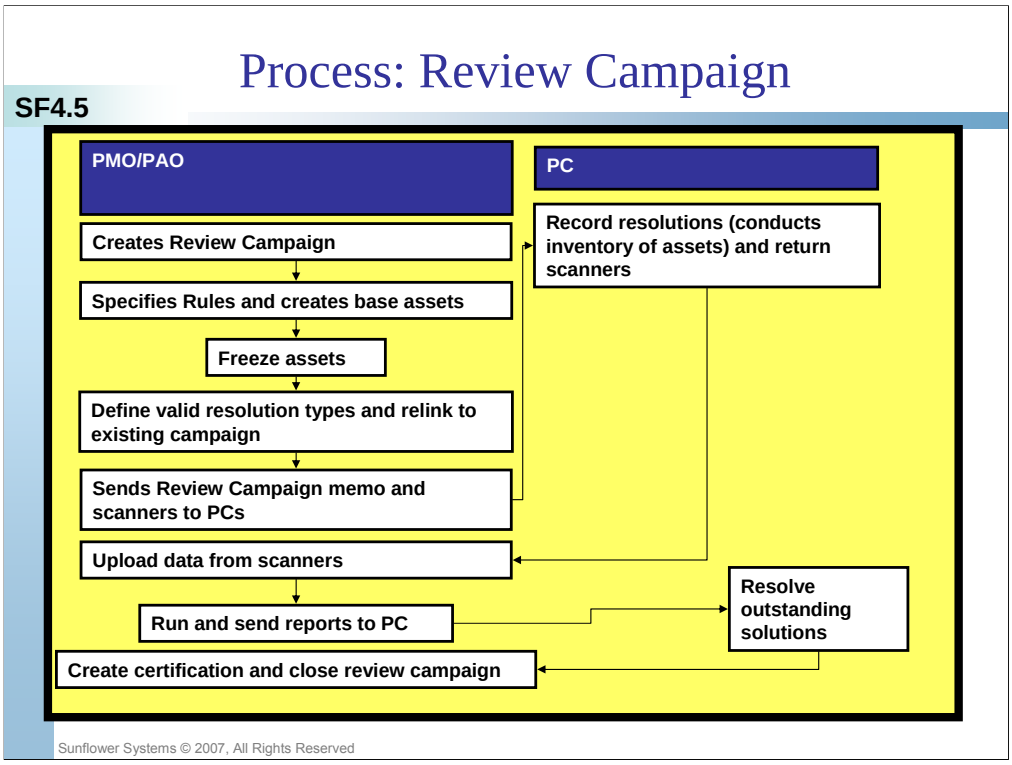
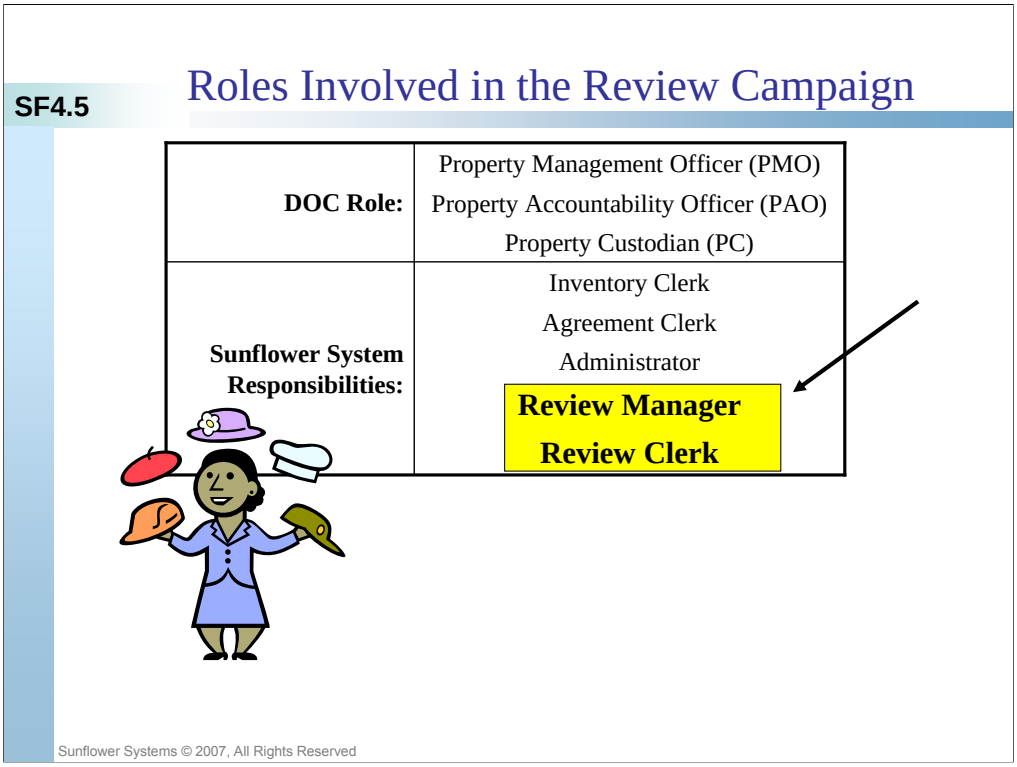


This chapter focuses on the role of the **PC** during the review campaign.



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

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

- Create
- Manage
- Close

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

SF4.5

Review Campaign Memo

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

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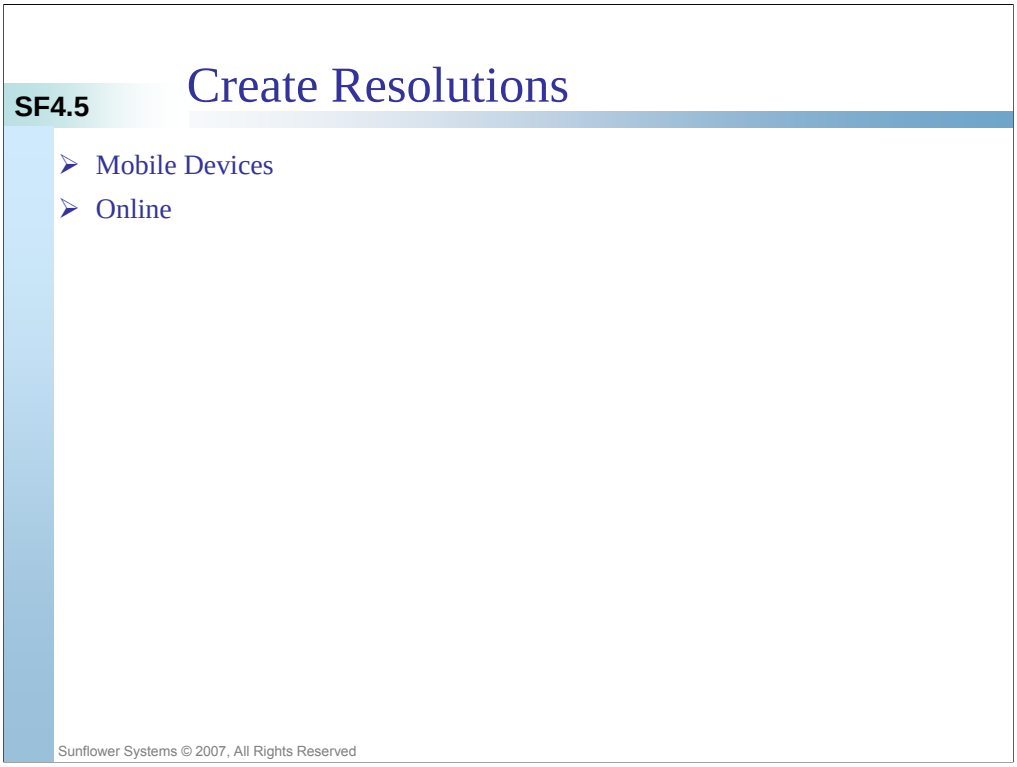
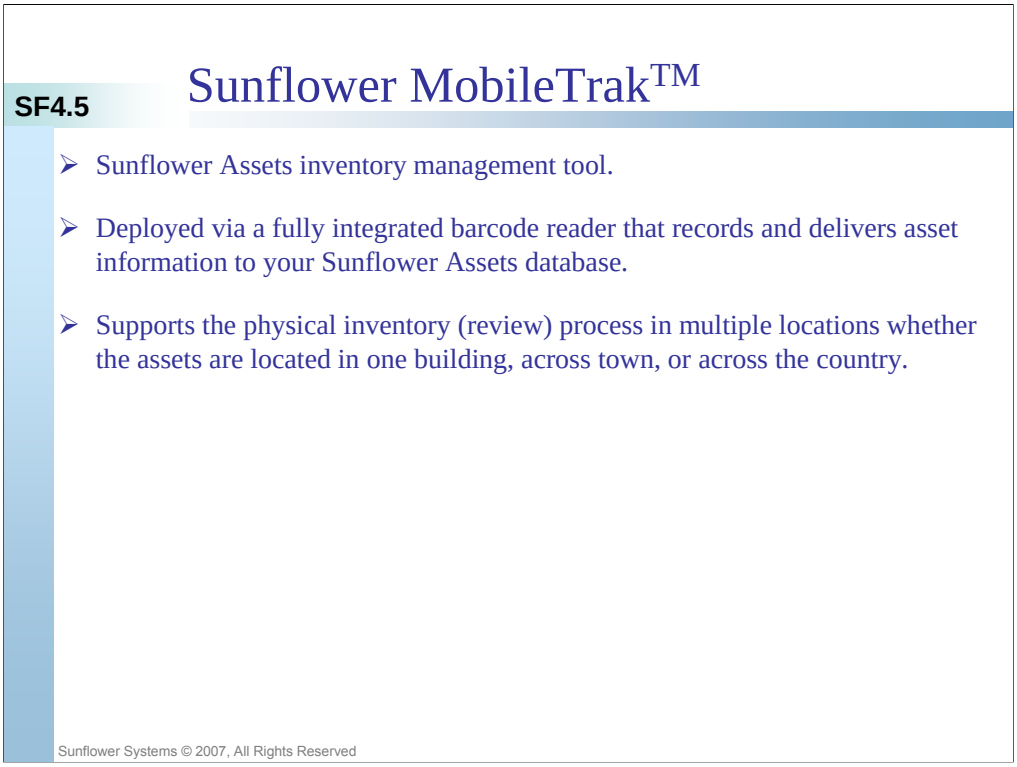
PCs may also review the Review Campaign Properties Report to see all the details of a particular Review Campaign.



Any user that is part of the physical inventory process can create resolutions for the assets in the review campaign. Users may use a mobile device (i.e., barcode scanner) or an online Sunflower Form to record resolutions.

When creating resolutions be sure that you are using the correct resolution type (barcode scanner or online form) during the allowed time period. Otherwise it may not be recorded correctly and the asset may still show as “missing” when the campaign is closed.

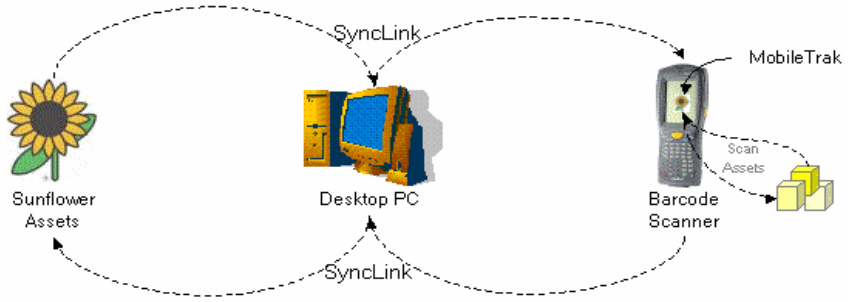


MobileTrak includes all of the files needed to perform a physical inventory with your barcode scanner. It is downloaded with all of DOC's asset data which includes values in the List of Values fields. Identification of an asset for physical inventory begins by defining a review campaign in Sunflower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

SF4.5

Barcode Scanner Software Suite

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



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SF4.5

MobileTrak™ - Overview

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

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SF4.5

MobileTrak - Download and Upload Assets

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

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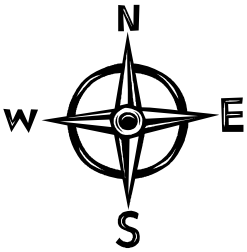
Inventory asset data is downloaded to the barcode scanners including all values in the LOVs which allows users to update information using the scanners as they are conducting the Review Campaign.

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

The PMO/PAO will conduct these steps prior to handing off the Barcode Scanners to the PC.

NAV: Scan Assets to Create Resolutions

SF4.5



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Scan Assets to Create Resolutions

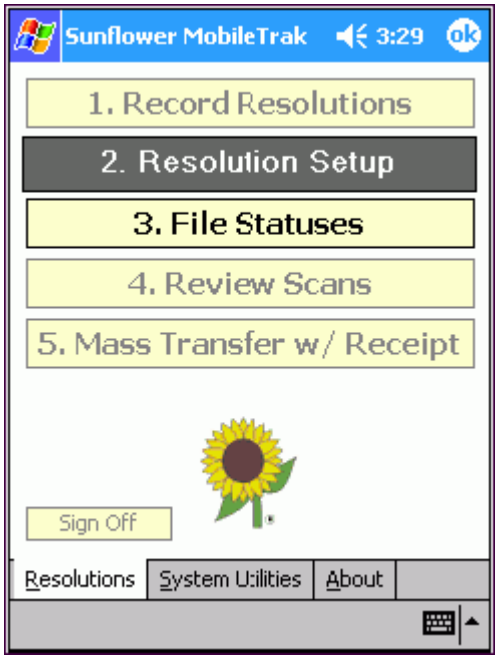
No Sunflower Role
M > Start > MobileTrak
MobileTrak

1. Select **Start.**

Sunflower Systems © 2007, All Rights Reserved

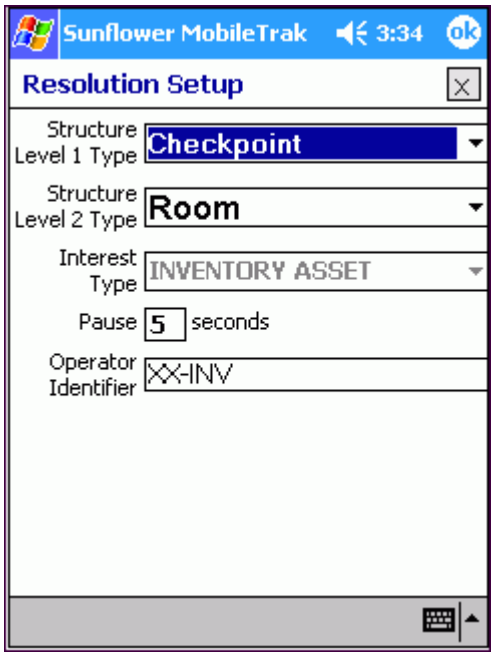
2. Select **MobileTrak**.

Result: The **MobileTrak** main menu appears.



3. Select **2. Resolution Setup.**

Result: The **Resolution Setup** window displays, and looks similar to the screenshot below:



4. Select **Building** from the **Structure Level 1 Type** field.

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5. Select **Room** from the **Structure Level 2 Type** field.

6. In the **Pause** field, select the number of seconds of waiting time between each scan (0 = no pause, 9 = indefinite pause).

7. Enter your Employee/Badge Number in the **Operator Identifier** field.

8. Select **OK.**

Result: You are returned to the MobileTrak main menu.

9. Select **1. Record Resolutions.**

Result: The **Record Resolutions** window displays, and looks similar to the screenshot below:

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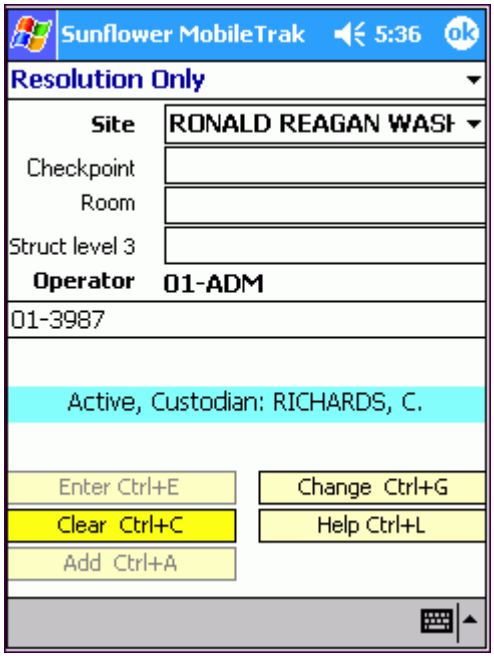

10. Select **Resolution Only** from the LOV at the top of the screen (above the **Site** field).

Result: Selecting this option will not update the location of the asset if the asset location in Sunflower is different than what is in the resolution record. This will enable the user to generate the report of assets with resolutions recorded at different locations.

11. Select the site of the building where you are going to scan assets from the **Site** field.

12. Select the building from the **Building** field.

13. Enter or scan the room number in the **Room** field.

14. Select the empty asset identifier field, below the **Operator** identifier.

15. Scan the asset's barcode number.

If the Message Line shows "Not found in reference file", goto task #17. Otherwise, goto task #16.

16. If the asset's reference data is found in the scanner, then the **Message Line** shows asset status and PC or Contact ID. If this is the case, select the **Clear Ctrl+C** button and move on to the next asset.

Note: If you are going to be scanning assets in other rooms, remember to change the room information through the **Resolution Setup** screen.

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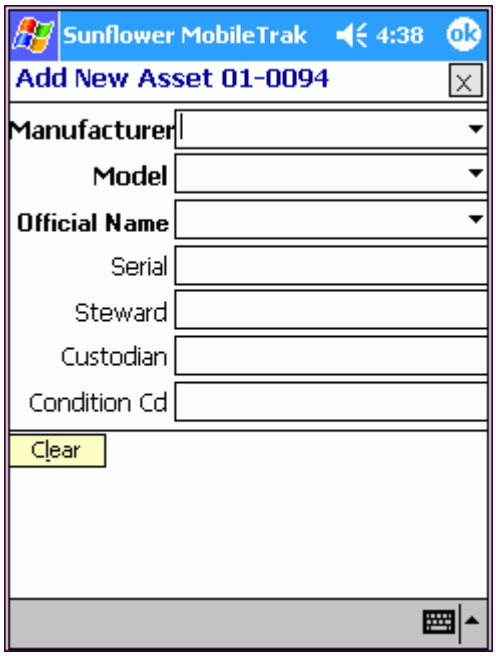
If you have more items to scan in the same room, goto task #15. Otherwise, goto task #24.

17. From the **Record Resolutions** screen, select the **Add Ctrl+A** button to add an asset.

Result: The **Add New Asset** screen appears.



18. Enter the manufacturer's name in the **Manufacturer** field, or scan the manufacturer from a printed list of common manufacturer barcodes.

19. Enter the model number in the **Model** field, or scan the model number from a printed list of common model number barcodes.

20. Enter the description in the **Description** field, or scan the description from a printed list of common description barcodes.

21. Enter the serial number in the **Serial** field, or scan the serial number of the asset.

Note: Skip the **Steward** and **Custodian** fields.

22. Enter the condition code of the asset in the **Condition Cd** field.

23. Select **OK** to save the record.

Result: The asset is recorded in the bar code reader and you are returned to the **Record Resolutions** screen.

If you have more items to scan in the same room:

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Goto task #15

If you have more items to scan in different rooms, goto task #9. Otherwise, goto task #24.

24. When finished, select **OK** to exit out of MobileTrak.

25. Select **Yes** to exit MobileTrak.

End of activity.

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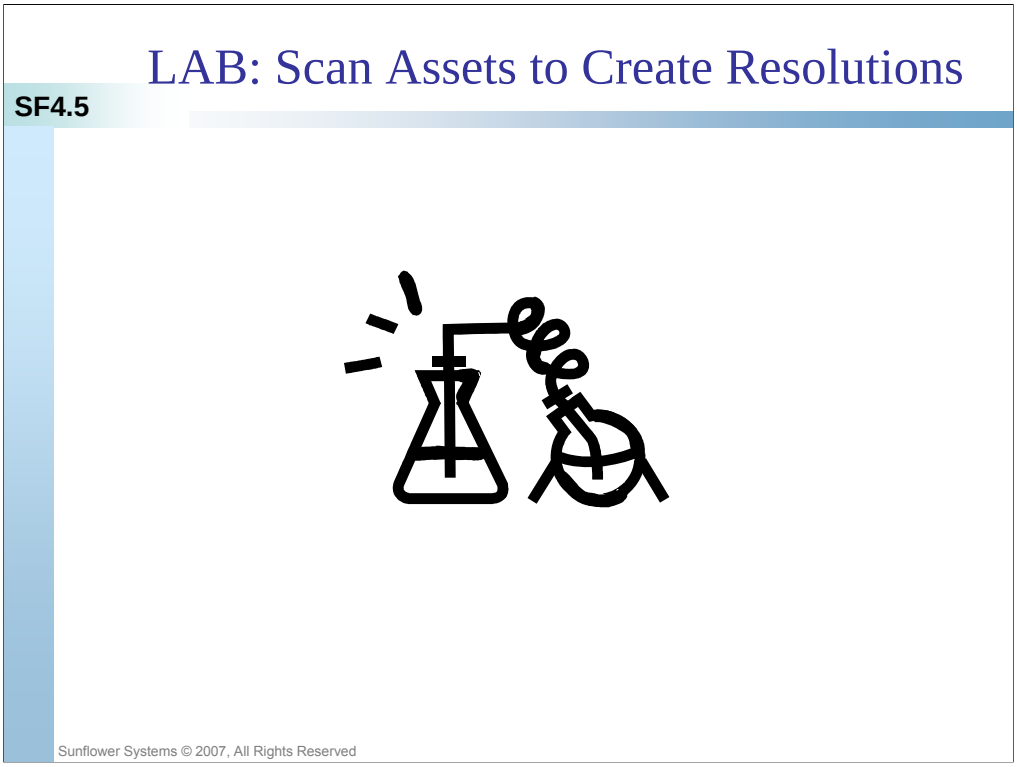
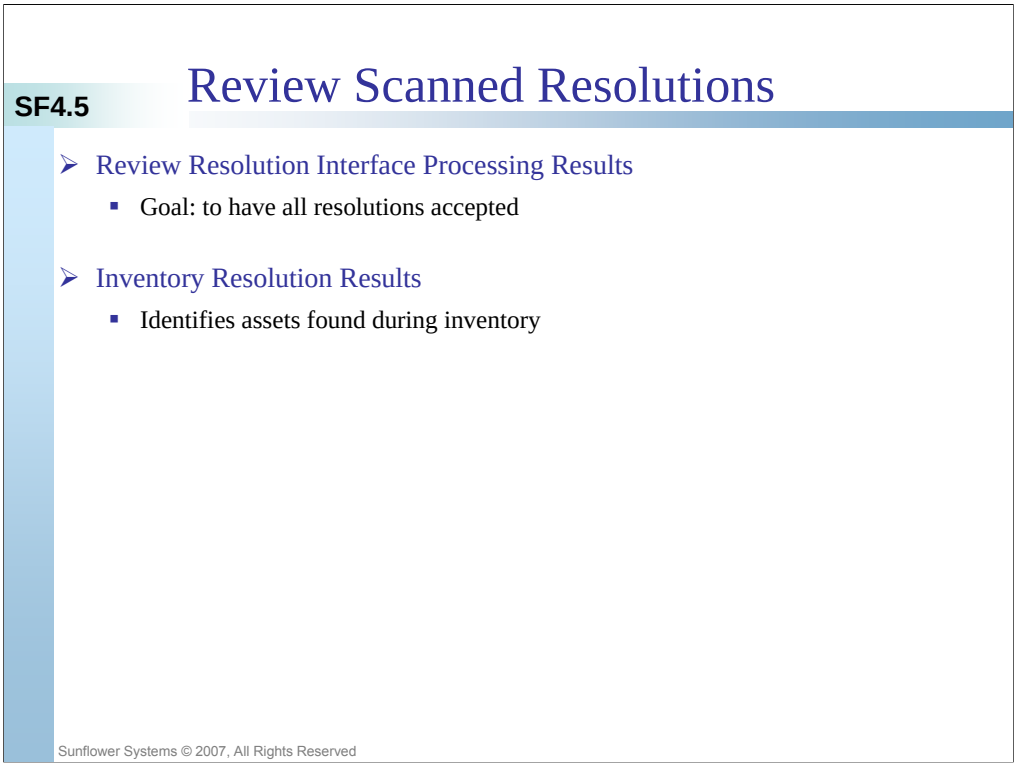


Check with your instructor to determine if scanners are available for conducting this Lab.



Resolution Interface Processing Results – Run report after assets have been barcode scanned and data transferred (uploaded) to Sunflower. Identifies any errors with data that was scanned. Three primary reasons why a scanned resolution fails are:

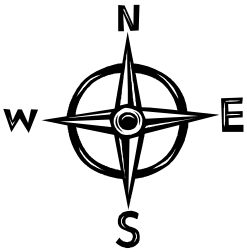
- New asset not created successfully and is sent to auxiliary resolution table
- One of the location fields was entered incorrectly (site or building)
- Person entering resolutions incorrectly entered their ID

Run report based on Inventory plus the scanner identifier

Inventory Asset Interface Processing Results – This report should be run after online resolutions are entered. It will highlight all assets that were found during inventory.

NAV: Review Resolution Interface Processing Results

SF4.5



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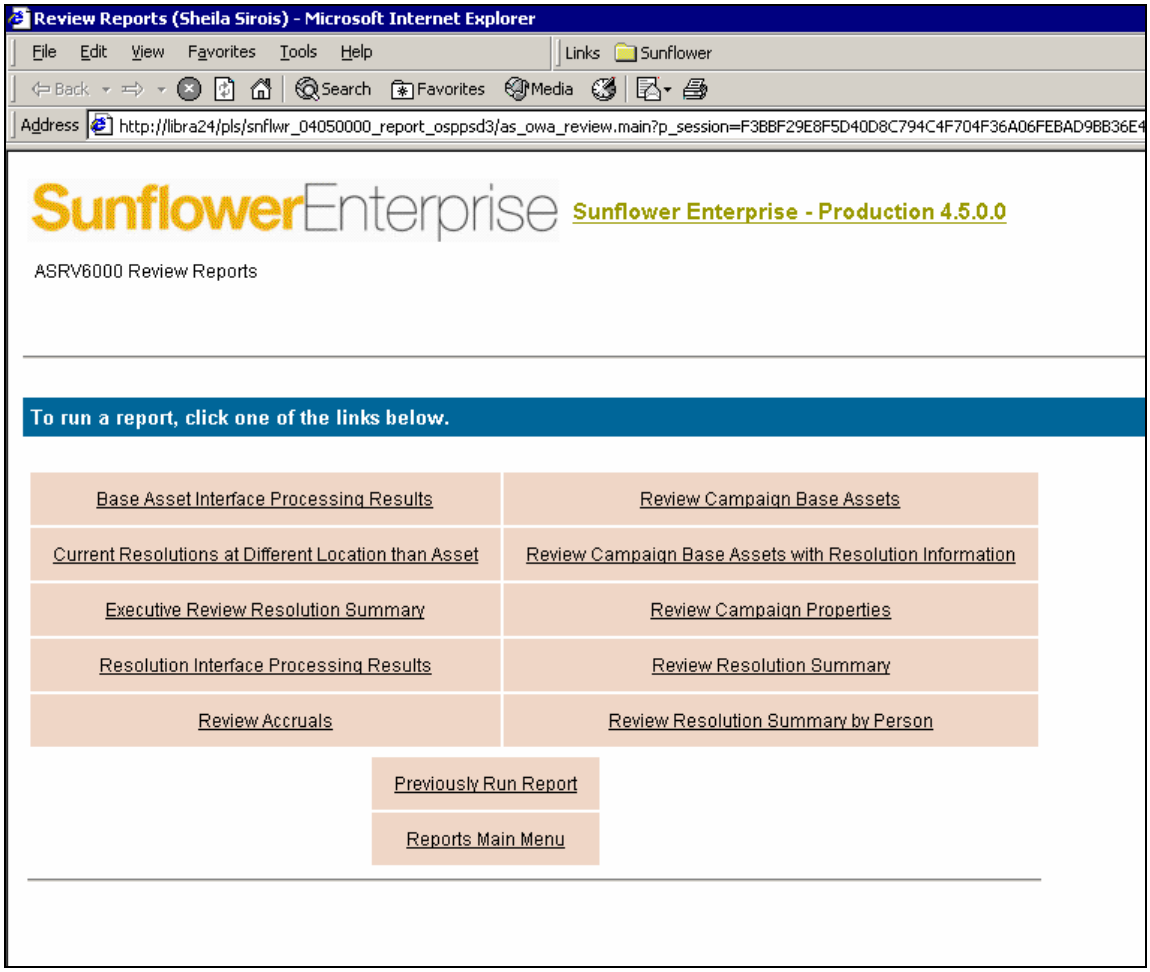
Review Resolution Interface Processing Results

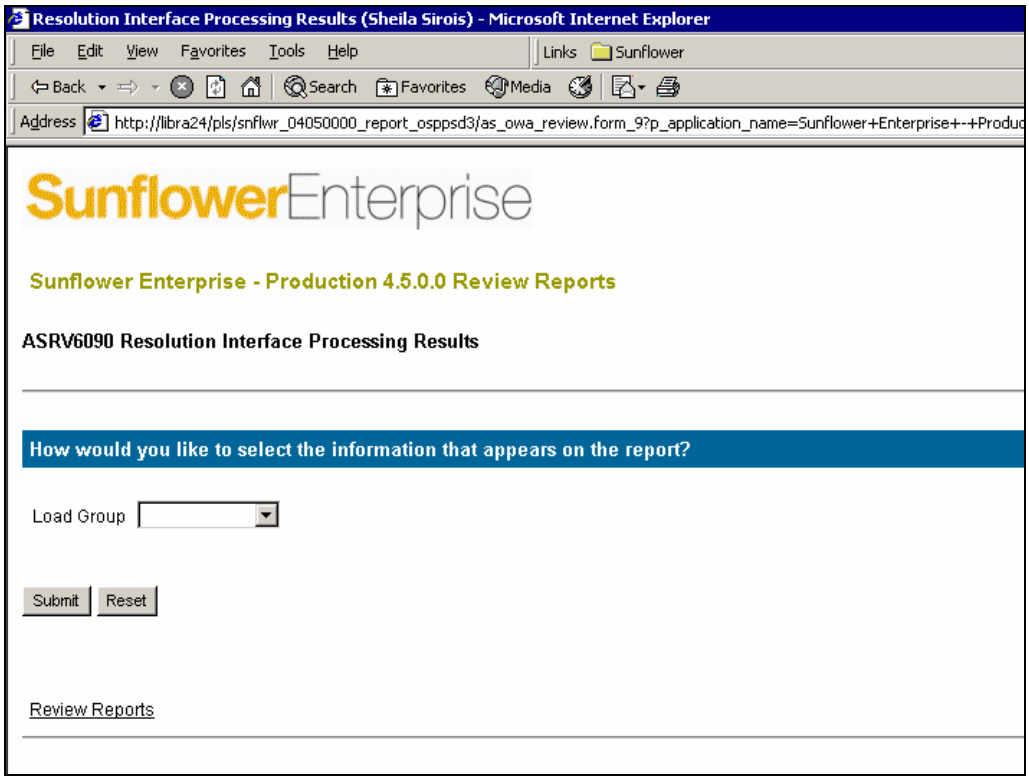
Review Manager
M > Review > Review Reports
Review Reports



1. Select **Resolution Interface Processing Results.**

   Result: The **Resolution Interface Processing Results** parameters window displays:

Sunflower Systems © 2007, All Rights Reserved



2. In the **Load Group** lookup list, select the Load Group number with the following format: **RS**<**Scanner ID**>.

   Note: To view the results from all scanners, leave the **Load Group** field blank.

3. Select **Submit.**

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

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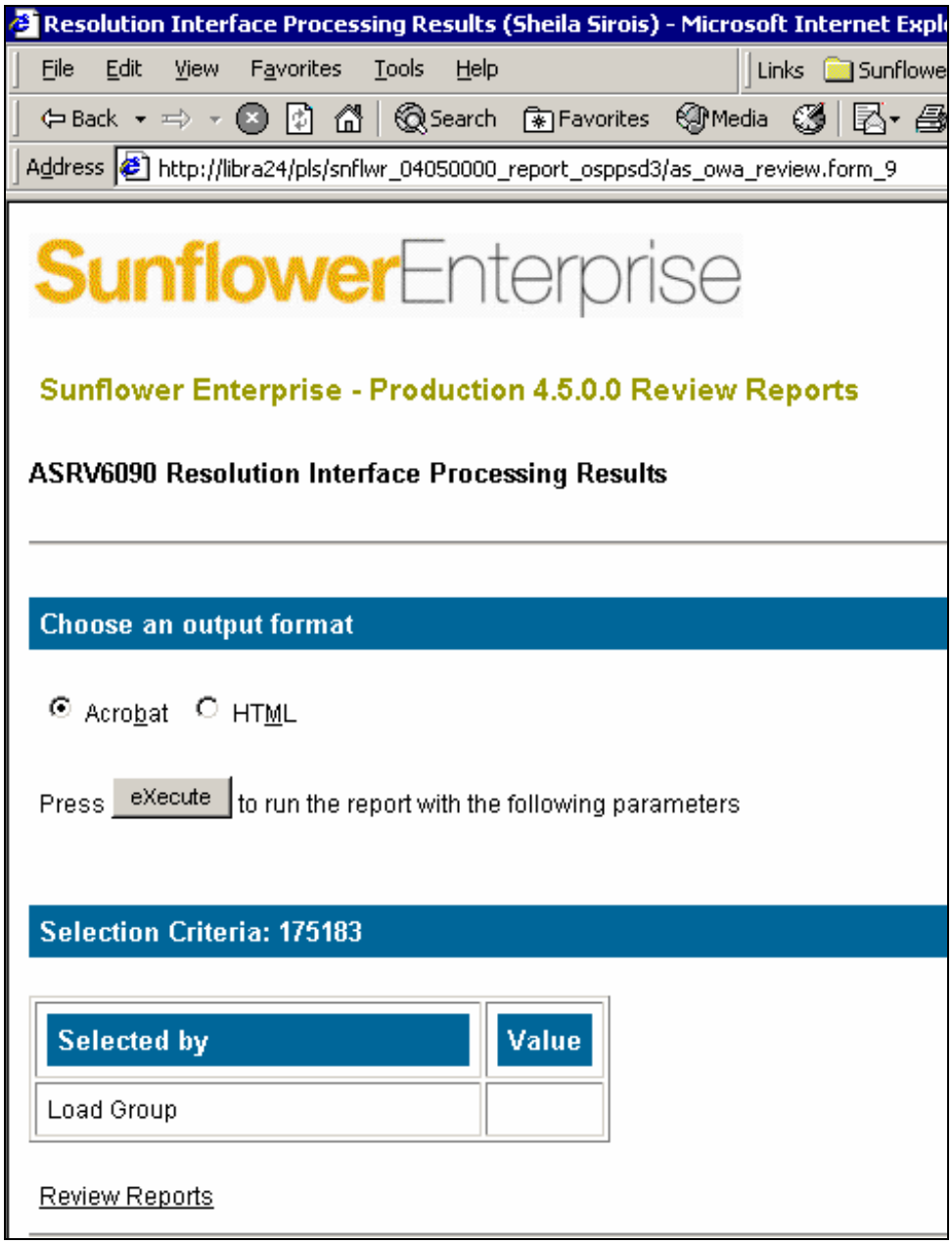

4. Select the **Acrobat** radio button.

5. Select **eXecute.**

Result: The report displays in a separate window, allowing you to review the resolution interface processing results.

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Sunflower Assets | Resolution Interface Processing Results | Page 2 of 4
ASRV6090 | 11/15/2005 18:41

RS0000000001 : RS0000000001

Record Group	Date	Result
11-1051102103751	11/03/2005 14:35:38	OK (Identifier:INV - 7.1.1.STEP11-1 Type:Date/Time:11/02/2005 10:37:51 Site:CAMPUS Stlvl 1:BUILDING 10 Stlvl 2:ROOM 123 Stlvl 3:)
Success Total	1	

Record Group	Date	Result
Failure Total	0	

Record Group	Date	Result
Unmatched Total	0	
Load Group Total	1	

Note: See below for an explanation of the report features:

- The first group shows the resolution records that were processed successfully.
- The second group shows the failed resolution records that could not be processed due to some error. Any errors should be investigated and fixed accordingly.
- The third group shows the unmatched resolution records that are stored in as_auxiliary_load_resolutions table to be processed later on when the found asset is successfully created in Sunflower Asset.

End of activity.

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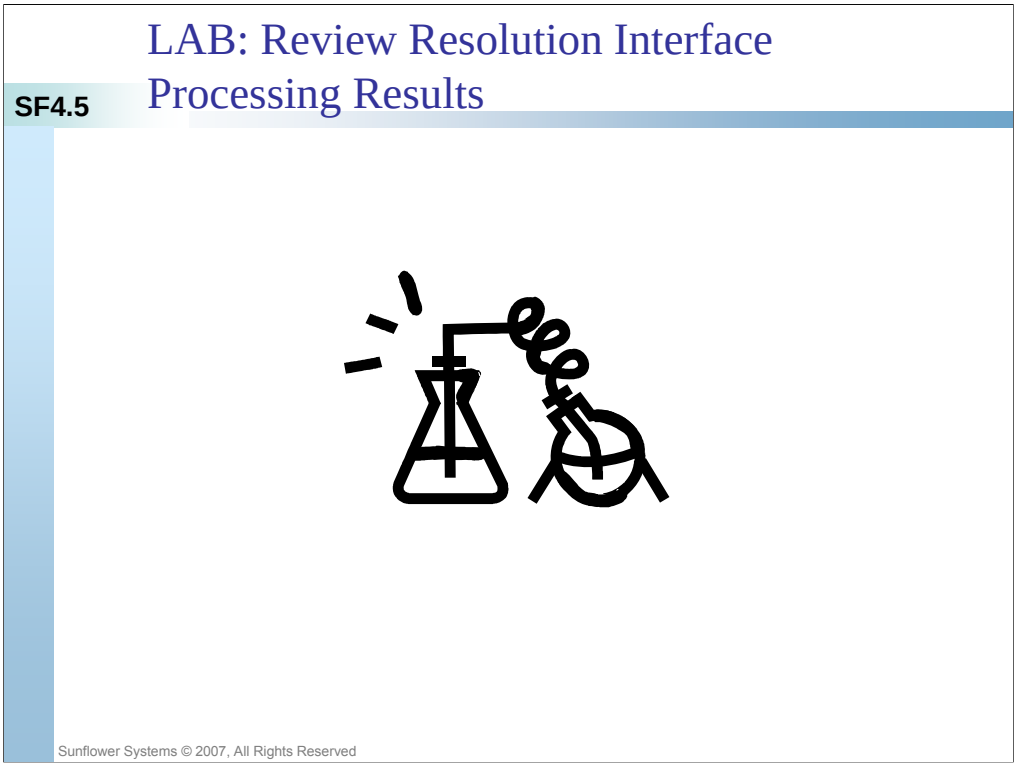

Check with your instructor to determine if scanners are available for conducting this Lab.

SF4.5

Manage Uploaded Data

- If Inventory Management assets were added, you may need to use the ***Edit Inventory Assets Interface Records*** form to edit the asset data and add additional details in order to create a valid asset that can be saved to the database.
- If resolution errors were indicated, you may need to use the ***Edit Resolution Interface Records*** form to edit the resolution data in order to create a valid resolution.
- If no additions or changes were made to scanned assets, then you may simply want to review the assets by using the ***Lookup Inventory Assets Resolutions*** form.

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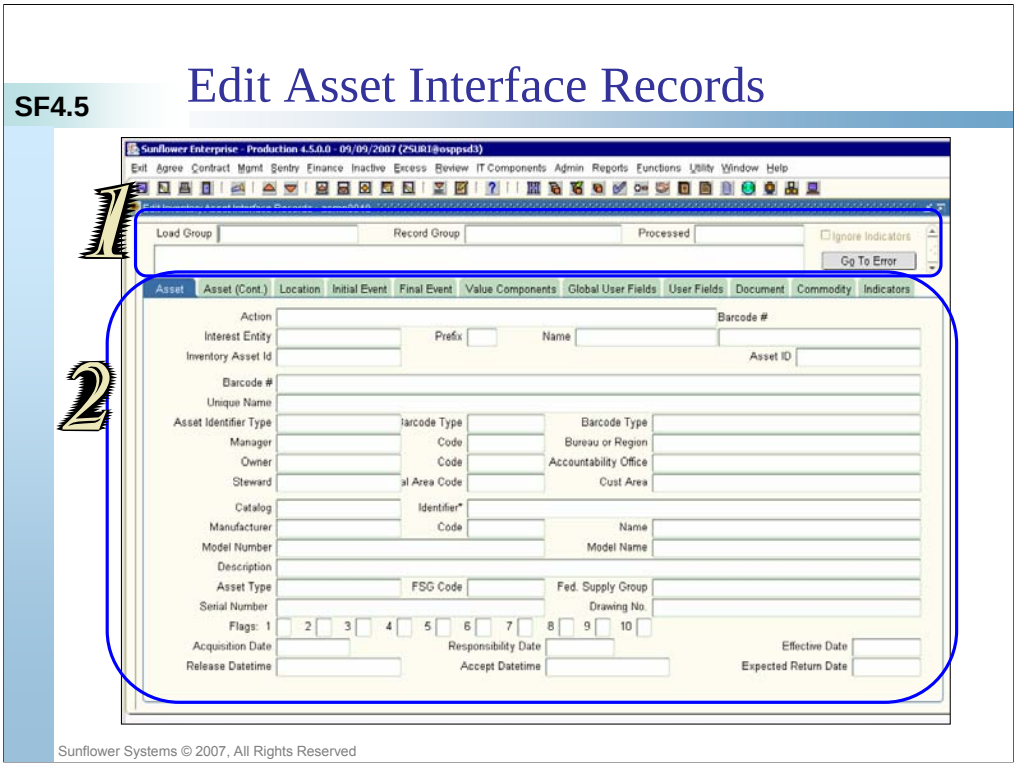
After the MobileTrak data is scanned, one of three actions may need to occur:

•Enter additional data for assets found during inventory

•Fix errors (location entered incorrectly, user entering assets incorrectly signed in)

•Review all assets



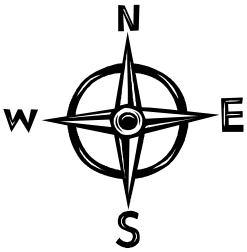
The Edit Inventory Interface Records form enables you to modify records that enter Sunflower Assets from MobileTrak. Anytime a new asset is added using MobileTrak, the new asset will require additional details not available within MobileTrak. You will be able to use the Edit Inventory Interface Records form in order to amend the asset data and save the new asset to the database. Additionally, this form is useful to update details to an asset record should there be errors in the data related to the asset. Once corrections have been successfully saved, the error is now removed from the interface records and will not appear in here in subsequent queries.

Area 1: With your cursor in the **Load Group** field, click the Find icon twice to load all data needing resolutions. Search for an error by using the **Go To Error** button or enter an barcode number in **Area 2**.

Area 2: Use the necessary fields to update the data for the added assets or to correct errors. Use the tabs at the top to navigate to additional asset record details.

NAV: Edit Inventory Asset Interface Records

SF4.5



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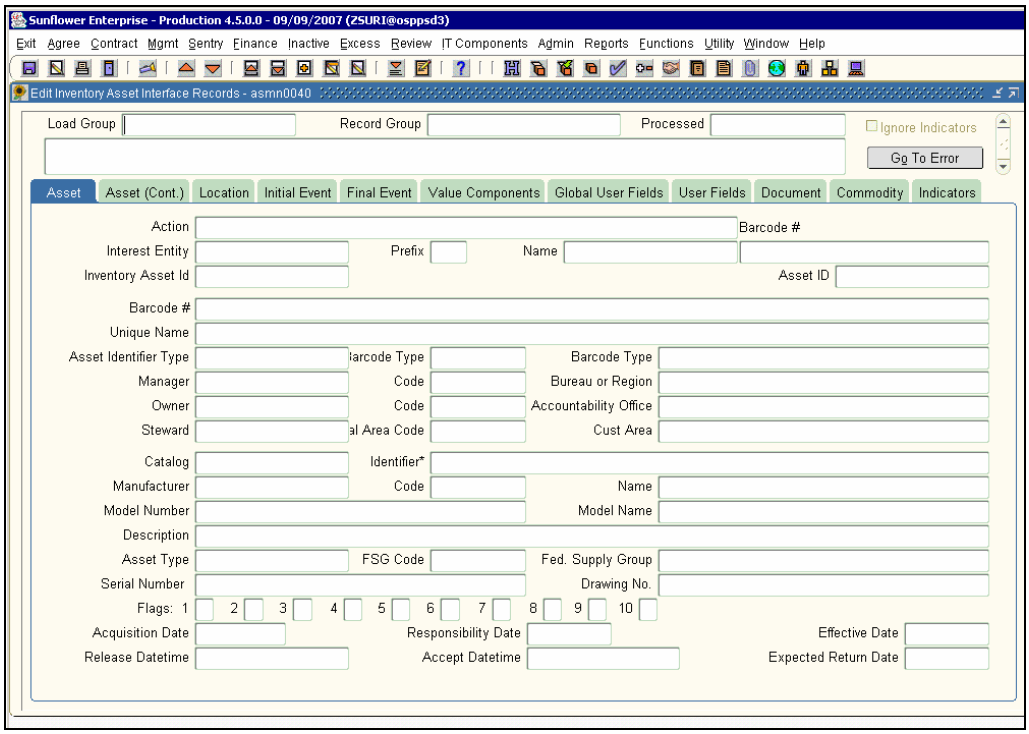
Edit Inventory Asset Interface Records

Purpose

The purpose of this document is to describe how to convert error records uploaded from the bar code reader into updated property records.

Review Manager, Inventory Manager
M > Mgmt > Edit Inventory Asset Interface Records
Edit Inventory Asset Interface Records



1. Place your cursor in the **Load Group** field.

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

3. Leave the query criteria screen blank and select the **Find** button from the toolbar again. This will return all errors.

4. Select the **Go To Error** button to search through the errors.

<u>Result:</u> The cursor is placed in the field with the error.

5. Update any information as needed.

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6. Select the **Tabs** across the top of the screen to access additional property details to update.

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

Result 1: The message on the status bar will indicate that the record was successfully saved.

Result 2: The record is removed from the interface table, and the property record will be updated with the new information.

8. Continue to scroll through the records, repeating steps 4-7, until there are no more errors.

End of activity.

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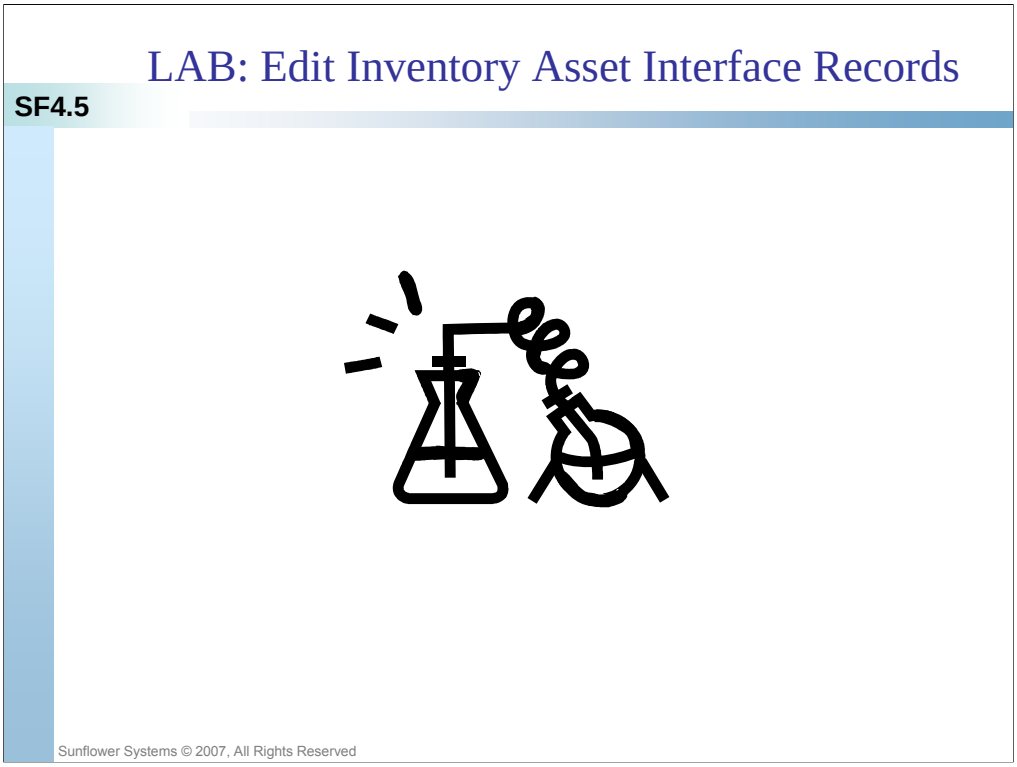

Check with your instructor to determine if scanners are available for conducting this Lab.

SF4.5

Assets Found During Inventory

- Assets scanned, but not currently in Sunflower
- Need to update the information in Sunflower to create a complete property record

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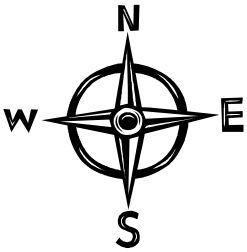
The **Inventory Asset Interface Processing Results** report will identify these records.

SF4.5

NAV: Generate Report of Assets Found During Inventory



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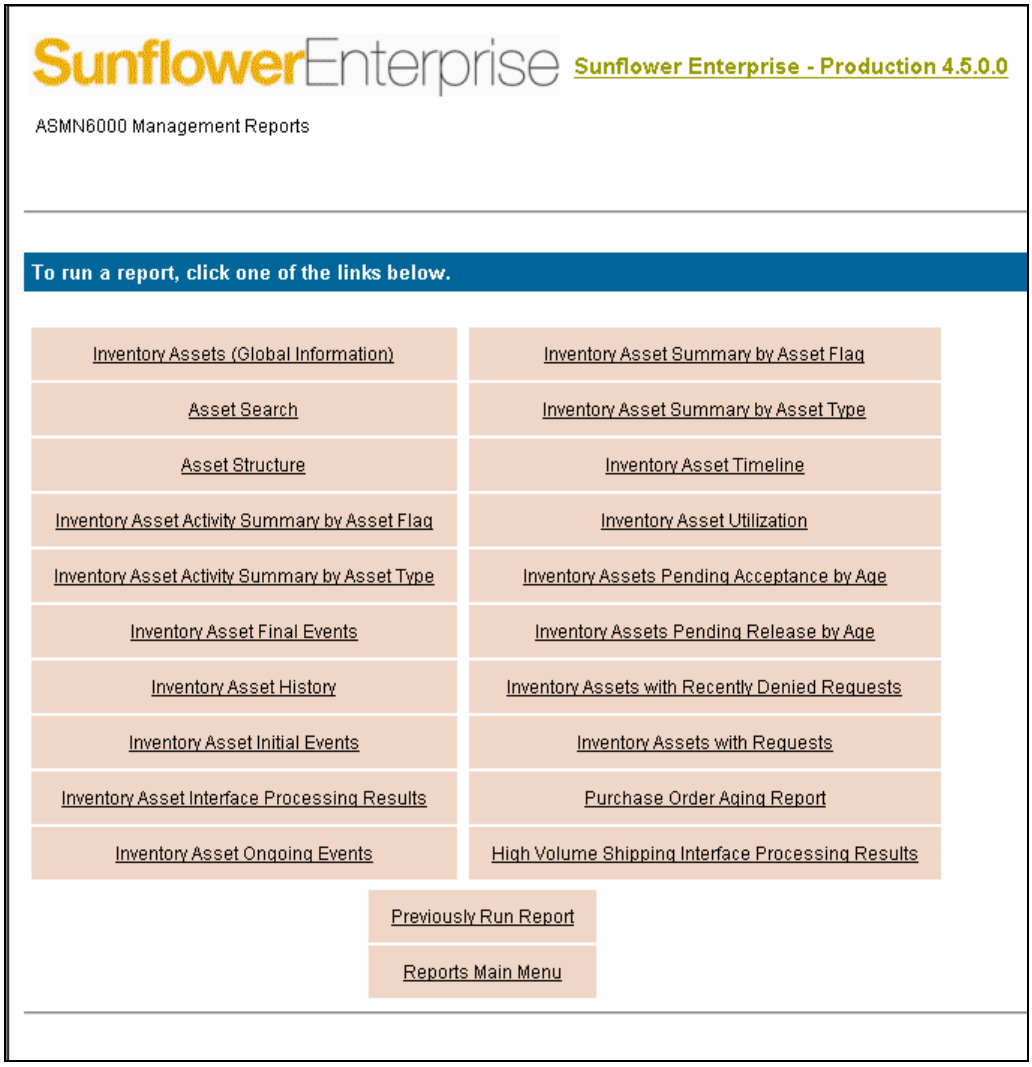
Generate Report of Assets Found During Inventory

Review Manager
M> Mgmt > Management Reports
Management Reports



1. Select **Inventory Asset Interface Processing Results**.

Result: The **Inventory Asset Interface Processing Results** parameters window displays:

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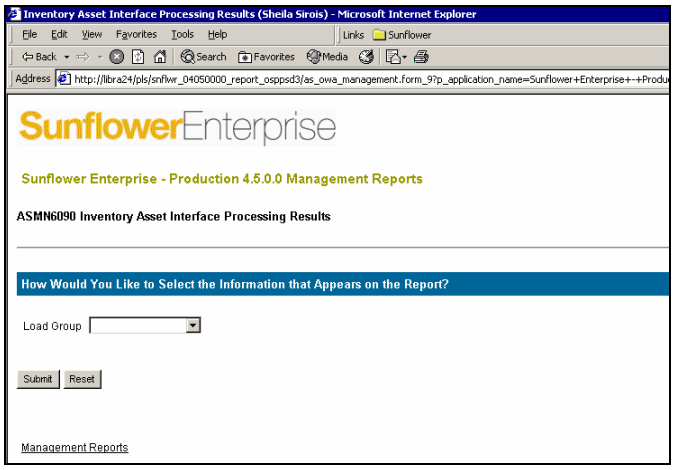
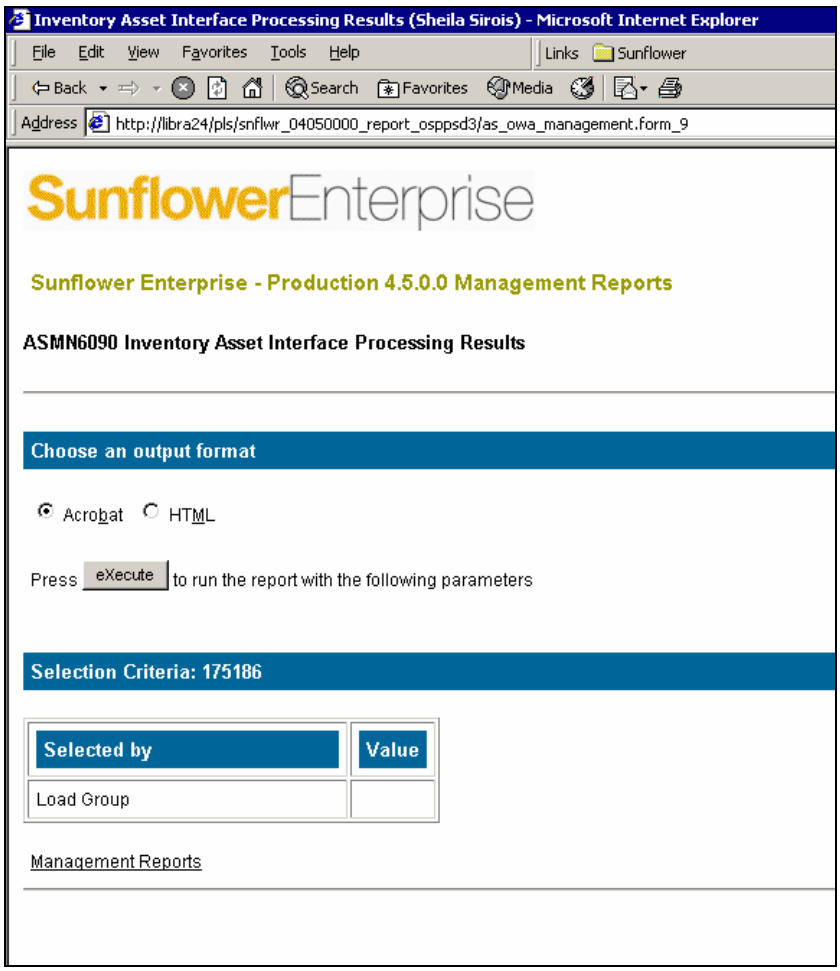


2. In the **Load Group LOV**, select the Load Group number.

3. Select **Submit**.

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



4. Select the **Acrobat** radio button.

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5. Select **eXecute**.

Result: The report displays in a separate window, allowing you to review the results of the inventory asset interface processing.

The Report is sorted as follows:

- The first group shows the found inventory assets that were created successfully.

- The second group shows the failed inventory asset records that could not be created due to some error.

End of activity.

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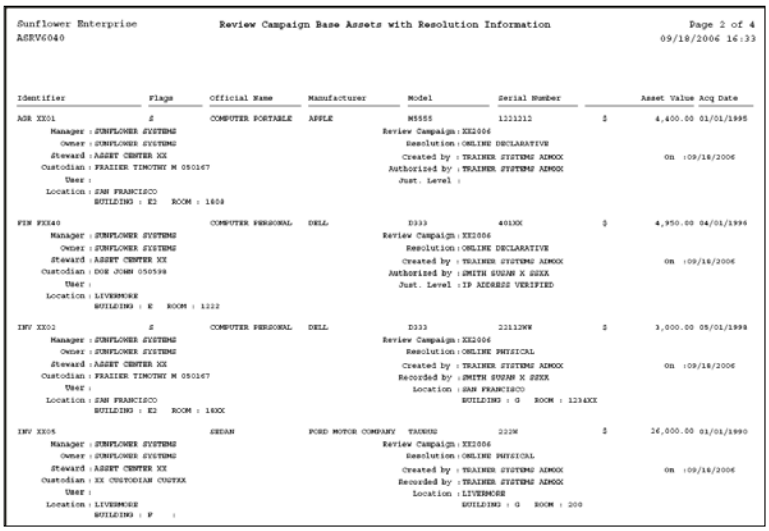
SF4.5

Review Campaign Base Assets with Resolution Information



Sunflower Enterprise — Review Campaign Base Assets with Resolution Information — Page 2 of 4
ASRV6040 — 09/18/2006 16:33

Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
AGR XX01	S	COMPUTER PORTABLE	APPLE	M5555	1211212	$ 4,400.00	01/01/1995
Manager : SUNFLOWER SYSTEMS				Review Campaign : XX2006			
Owner : SUNFLOWER SYSTEMS				Resolution : ONLINE DECLARATIVE			
Steward : ASSET CENTER XX				Created by : TRAINER SYSTEM2 ADMXX		On	:09/18/2006
Custodian : FRAZIER TIMOTHY M 050167				Authorized by : TRAINER SYSTEM2 ADMXX			
User :				Just. Level :			
Location : SAN FRANCISCO							
BUILDING : E2 ROOM : 1608							
FIN FXX40		COMPUTER PERSONAL	DELL	D333	401XX	$ 4,950.00	04/01/1994
Manager : SUNFLOWER SYSTEMS				Review Campaign : XX2006			
Owner : SUNFLOWER SYSTEMS				Resolution : ONLINE DECLARATIVE			
Steward : ASSET CENTER XX				Created by : TRAINER SYSTEM2 ADMXX		On	:09/18/2006
Custodian : DOE JOHN 050598				Authorized by : SMITH SUSAN X SSXX			
User :				Just. Level : IP ADDRESS VERIFIED			
Location : LIVERMORE							
BUILDING : K ROOM : 1222							
INV XX02	S	COMPUTER PERSONAL	DELL	D333	221123KW	$ 3,000.00	05/01/1998
Manager : SUNFLOWER SYSTEMS				Review Campaign : XX2006			
Owner : SUNFLOWER SYSTEMS				Resolution : ONLINE PHYSICAL			
Steward : ASSET CENTER XX				Created by : TRAINER SYSTEM2 ADMXX		On	:09/18/2006
Custodian : FRAZIER TIMOTHY M 050167				Recorded by : SMITH SUSAN X SSXX			
User :				Location : SAN FRANCISCO			
Location : SAN FRANCISCO				BUILDING : G ROOM : 1234XX			
BUILDING : E2 ROOM : 16XX							
INV XX05		SEDAN	FORD MOTOR COMPANY TAURUS	222W		$ 26,000.00	01/01/1990
Manager : SUNFLOWER SYSTEMS				Review Campaign : XX2006			
Owner : SUNFLOWER SYSTEMS				Resolution : ONLINE PHYSICAL			
Steward : ASSET CENTER XX				Created by : TRAINER SYSTEM2 ADMXX		On	:09/18/2006
Custodian : XX CUSTODIAN CUSTXX				Recorded by : TRAINER SYSTEM2 ADMXX			
User :				Location : LIVERMORE			
Location : LIVERMORE				BUILDING : G ROOM : 200			
BUILDING : F :							

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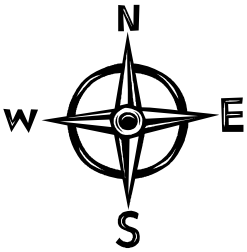
As the review campaign continues, the PAO/PMO will run reports identifying assets still not “found” during inventory. They will distribute the **Base Assets with Resolution Information** report to the PCs. This worksheet identifies all open assets and includes an area for the PC to note the location where the asset was found. The PC will then complete an Online Resolution form to input the information.

The PC may also take the initiative and run this report at any point during the campaign.

NAV: Review Campaign Base Assets with Resolution Information Report

SF4.5



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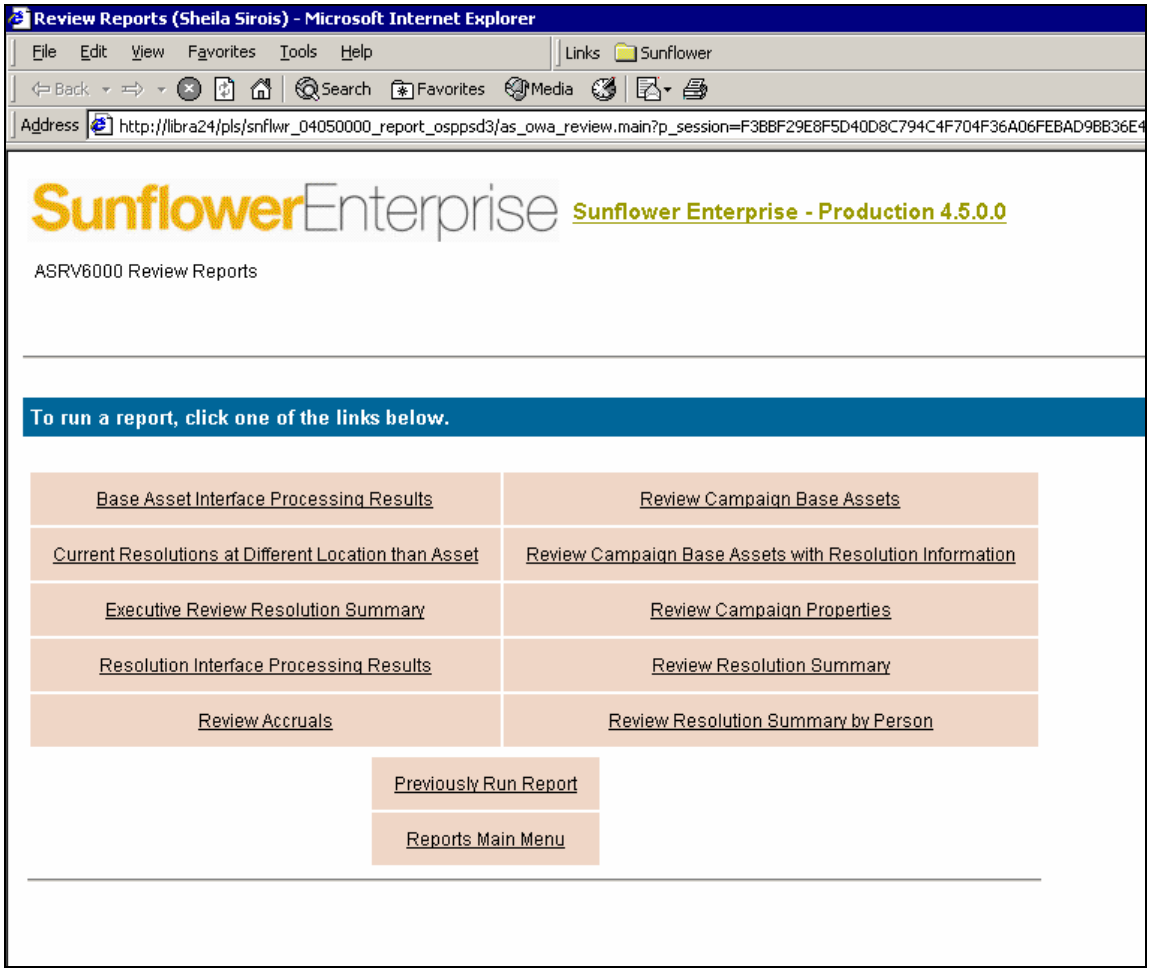
Review Campaign Base Assets with Resolution Information

Review Manager
M > Review> Review Reports
Review Reports



1. Select the **Review Campaign Base Assets with Resolution** link.

Result: The query criteria window is displayed.

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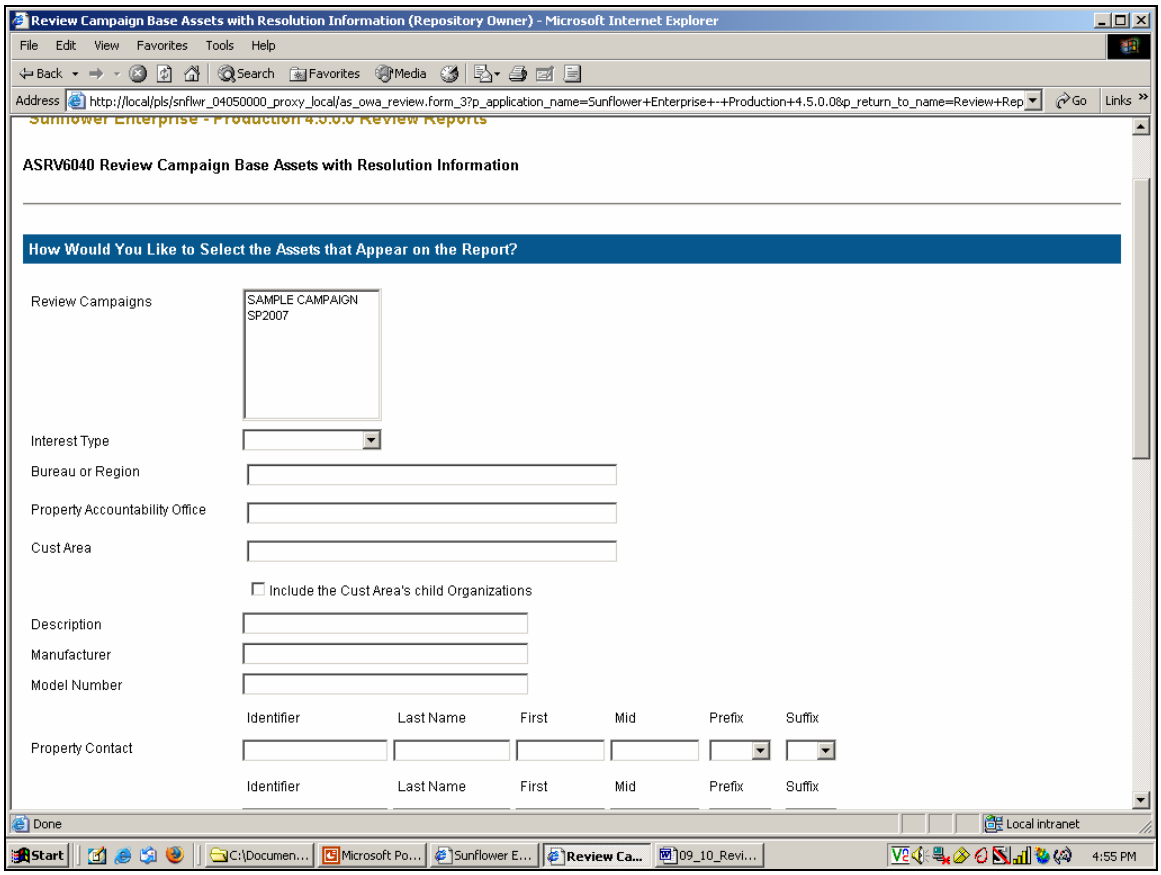

2. Select the Review Campaign in the **Review Campaign** field.

3. Select the **Interest Type** from the pull down menu on which to report.

4. Complete the remaining fields as desired.

5. Group the assets as you desire using the **How Would You Like the Assets to be Grouped?** pull down menu.

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

<u>Result:</u> The review screen appears.

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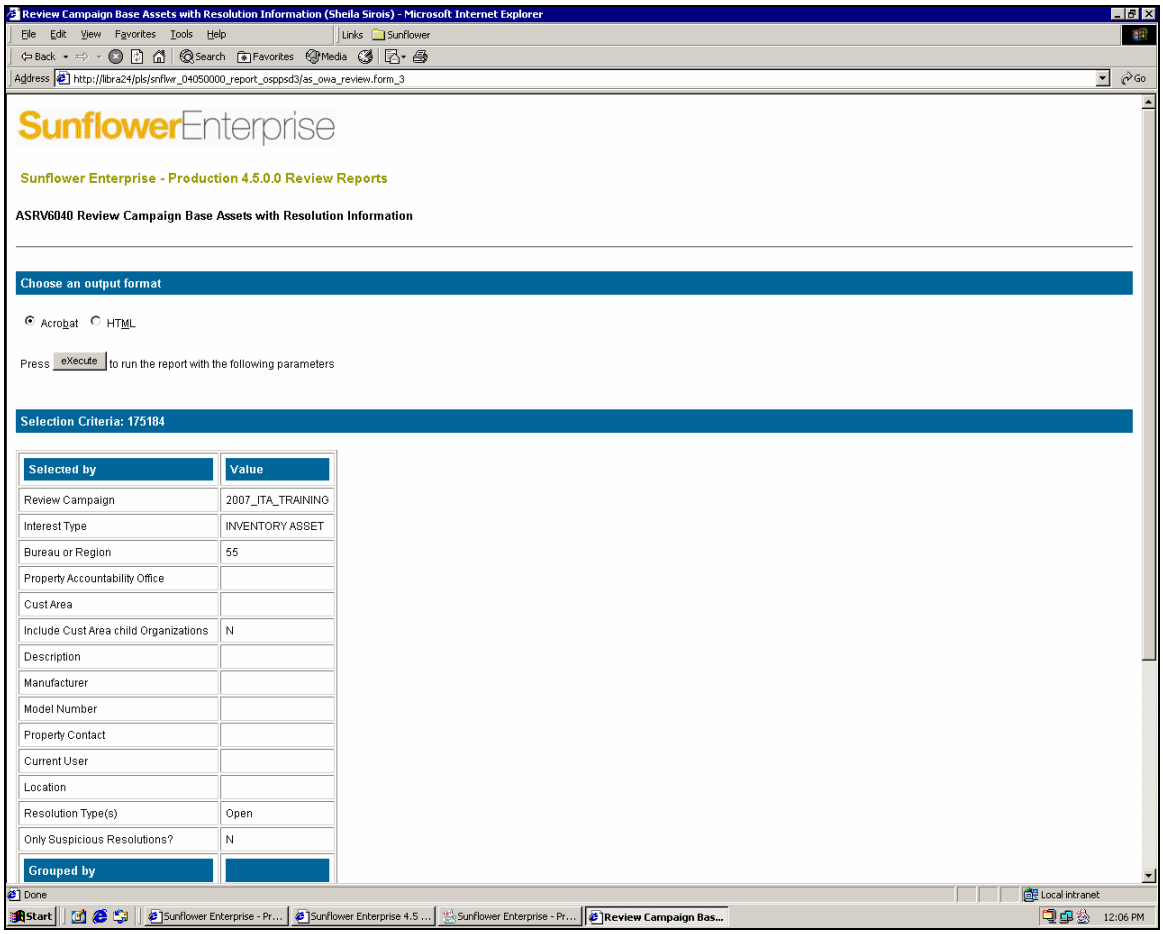

7. Select the **Acrobat** radio button.

8. Select the **eXecute** button to run the report.

Result: The report displays.

Below is a cover sheet of the **Review Campaign Base Assets with Resolution Information** report:

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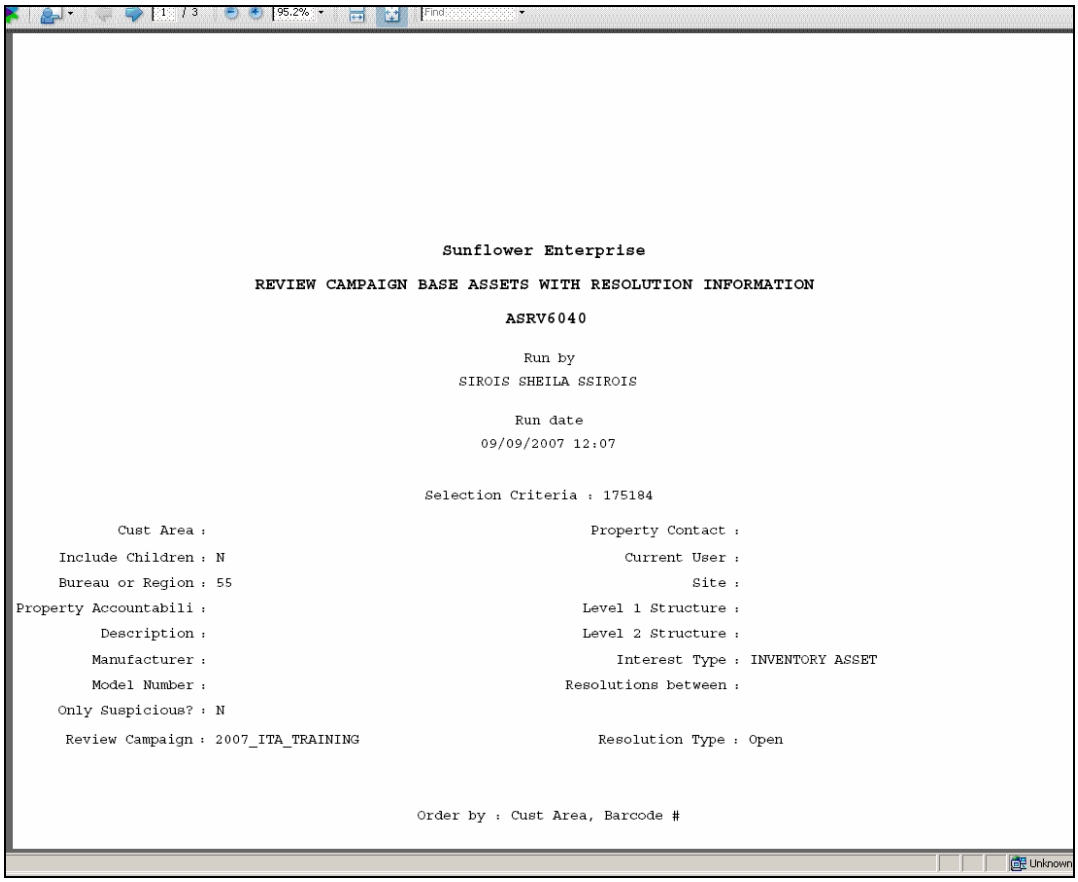

Sunflower Enterprise

REVIEW CAMPAIGN BASE ASSETS WITH RESOLUTION INFORMATION

ASRV6040

Run by
SIROIS SHEILA SSIROIS

Run date
09/09/2007 12:07

Selection Criteria : 175184

Cust Area :		Property Contact :	
Include Children :	N	Current User :	
Bureau or Region :	55	Site :	
Property Accountabili :		Level 1 Structure :	
Description :		Level 2 Structure :	
Manufacturer :		Interest Type :	INVENTORY ASSET
Model Number :		Resolutions between :	
Only Suspicious? :	N		
Review Campaign :	2007_ITA_TRAINING	Resolution Type :	Open

Order by : Cust Area, Barcode #

End of activity.

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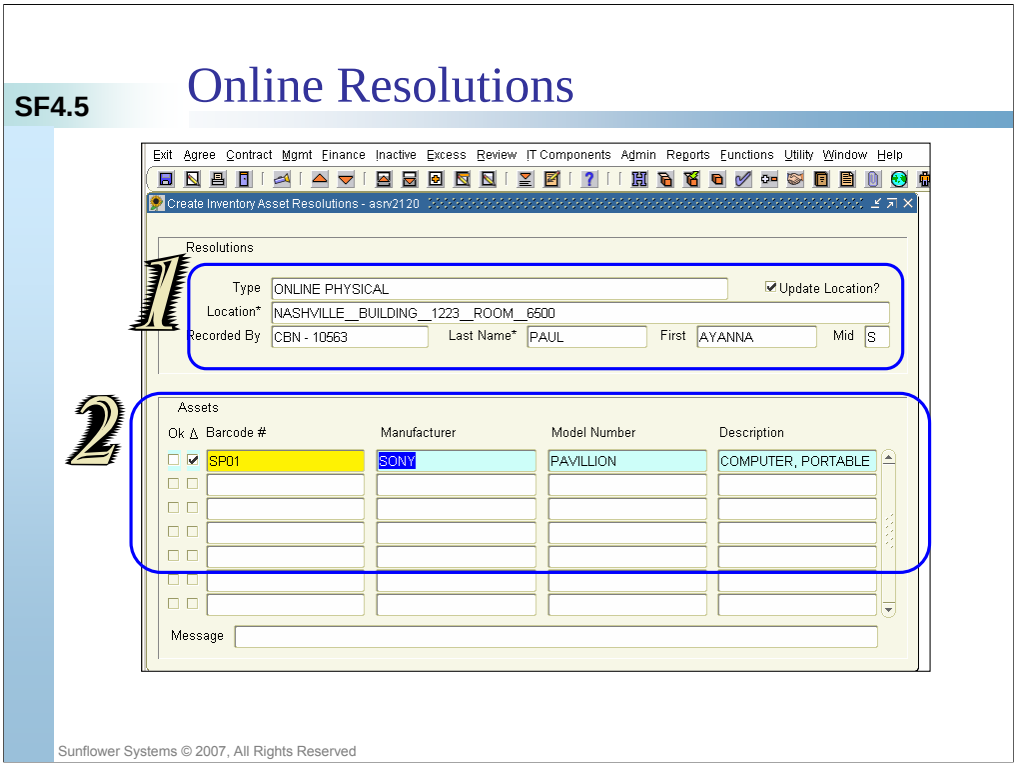


Area 1: Select the Resolution Type to be applied. When creating Online Resolutions, the following types of resolutions may be recorded:

- Confirmed Unaccounted – indicates asset not in your possession (transfer, repair, etc.) *(PMO/PAO only)*
- Declared Unaccounted – remove an open item from the reporting cycle *(PMO/PAO only)*
- Online Declarative – know the asset exist but cannot see it (e.g., an orbiting satellite) *(PC)*
- Online Physical – can not scan asset but can see and attest to physical location *(PC)*

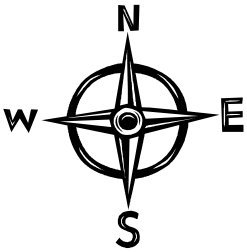
The remaining fields in **Area 1** depend upon the type of resolution selected. In the above example, Online Physical was selected which allows the user to update the location, identify the location where the asset was found and enter who is recording the resolution. In this situation, the **Update Location** checkbox is automatically populated. This allows the location to be updated automatically on the property record. If a *Review Clerk* **without** *Inventory Clerk* responsibilities leaves this box checked an error message will appear stating "Insufficient privileges to perform the operation." Double-click the location field to enter where the asset was found. This is a required field, even if the **Update Location** checkbox is unchecked.

Select the LOV for the **Last Name** field and select the last name, first name of the person recording the resolution.

Area 2: Resolutions may be created for one or more assets at a time. All assets listed in

NAV: Create an Online Resolution

SF4.5



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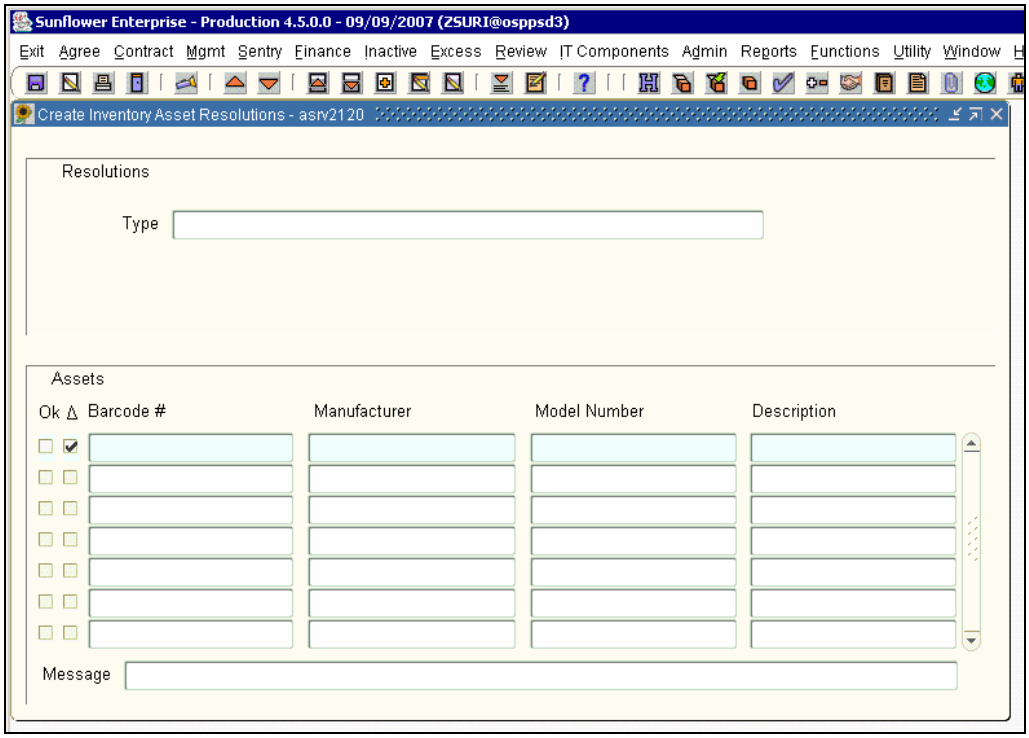
Record Online Resolutions

Review Manager/ Review Clerk

M > Review > Create Resolutions > Create Inventory Asset Resolutions

Create Inventory Asset Resolutions



1. Enter or select the Resolution Type in the **Type** field.

2. **Tab** to the next field. Result: The remaining fields at the top populate based upon your selection.

Type	Additional Fields to Complete
ONLINE PHYSICAL	Update Location Location Recorded By (Last Name, First Name, Mid)
ONLINE DECLARATIVE	Justification Authorized by (Last Name, First Name, Mid)
DECLARED UNACCOUNTED	Justification Authorized by (Last Name, First Name, Mid)
CONFIRMED UNACCOUNTED	Justification Authorized by (Last Name, First Name, Mid)

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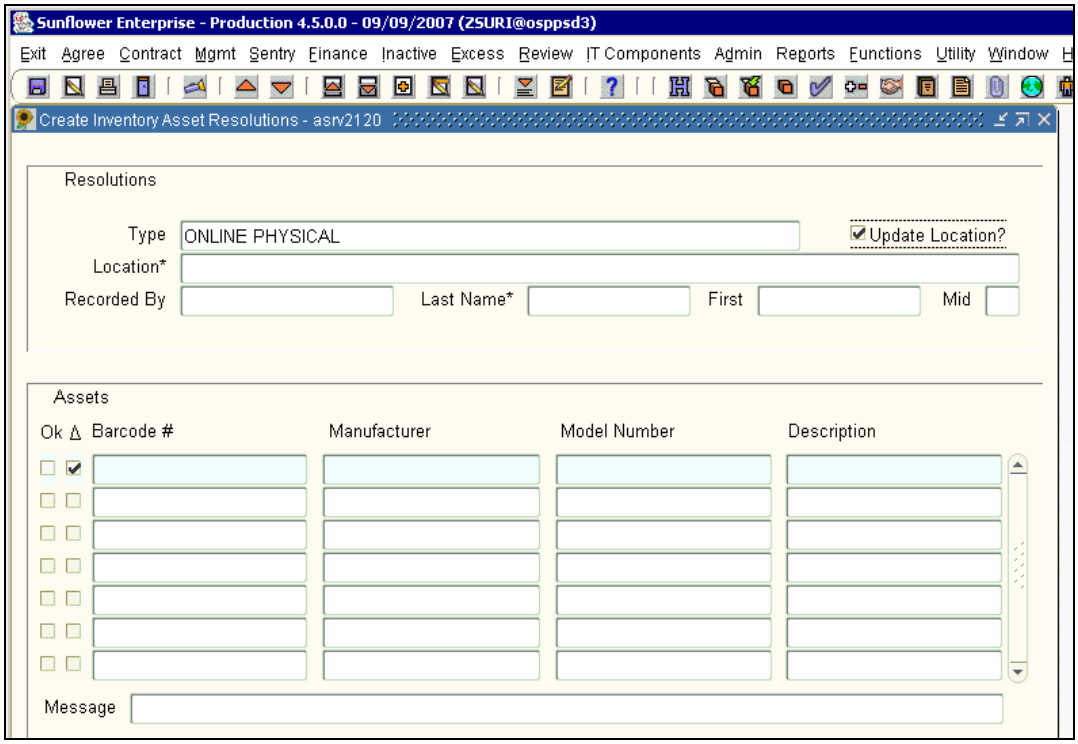
The example below is for an Online Physical resolution type:



3. If entering a location, select the **Save** button from the toolbar to save the **Location** record.

Result: You will be returned to the **Resolutions** window.

4. If necessary, enter the Justification in the **Justification** field.

5. **Tab** to the **Recorded/Authorized By** field.

6. In **Recorded By,** enter the employee/badge number of the person who is responsible for the online resolution being created. If employee/badge number is not known, use the **Last Name** field to search and select the appropriate person.

Note: This person must be a contact for the organization sponsoring the review campaign (i.e. Bureau). Any other people used will not create a valid resolution.

7. **Tab** to the next field.

8. Select the **Barcode Number** field and enter the barcode number of the asset for which you want to record an online resolution. If the exact barcode number is not known, select the **Find** button and use the pop-up **Query Criteria** screen to find the assets you want to record an online resolution for.

9. Select the **Save** icon from the toolbar to save the record.

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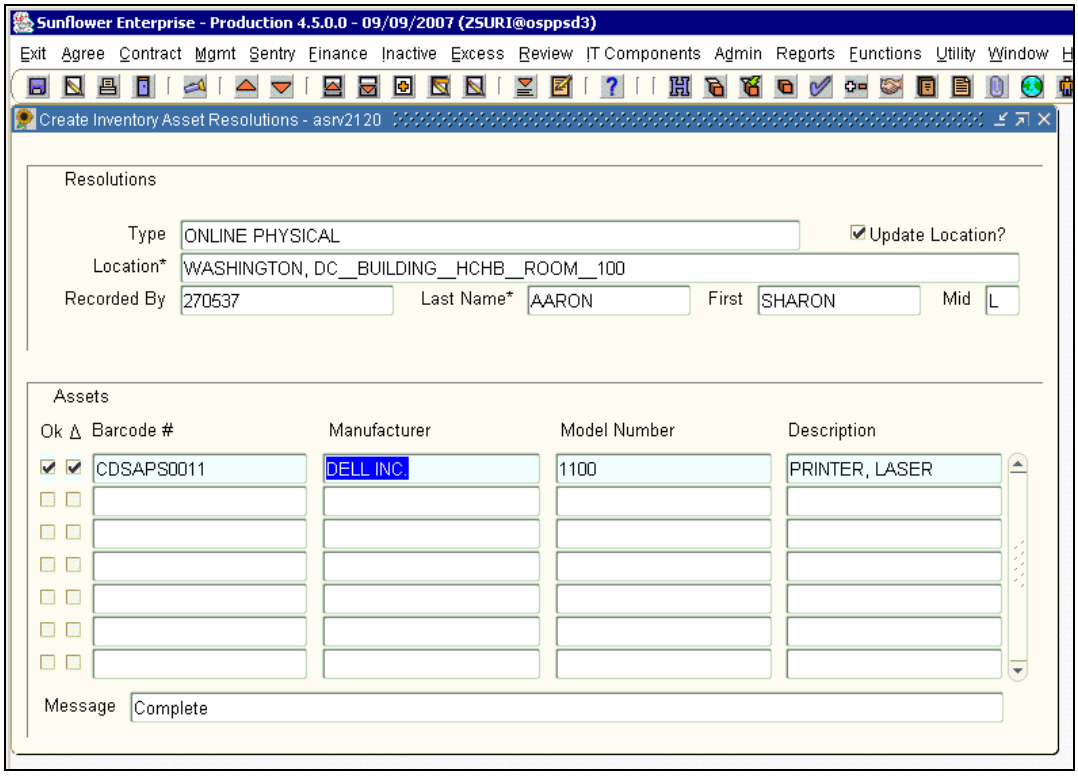
Result: The **Message** field will indicate the record is **Complete**.



End of activity.

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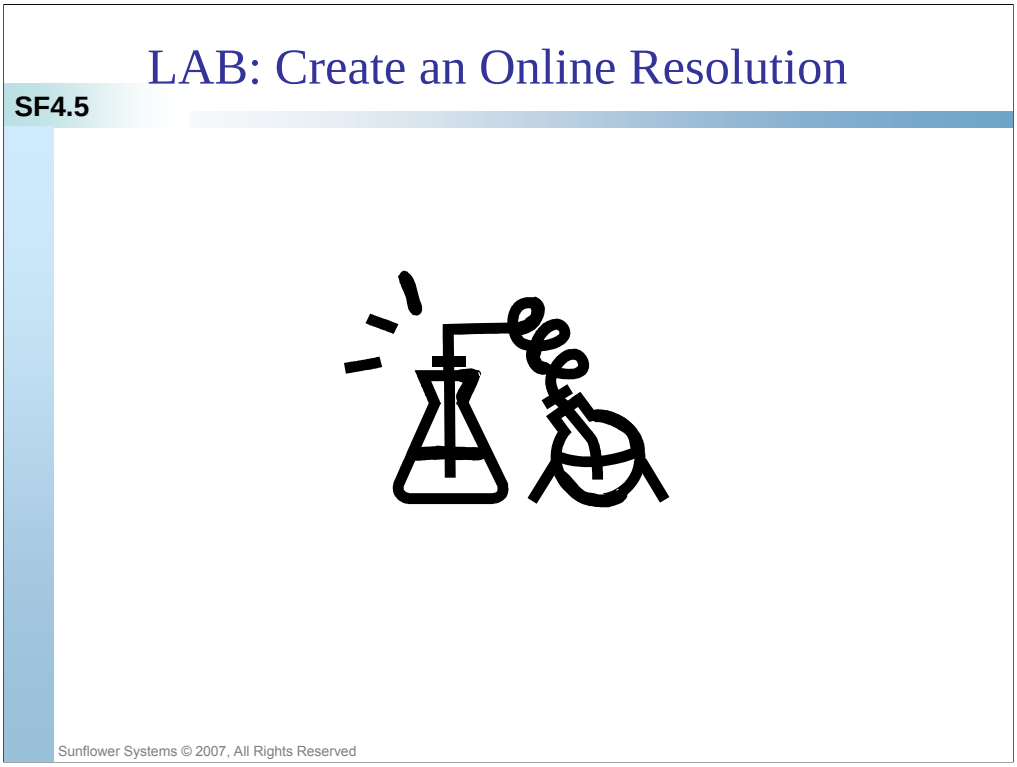

Create an Online Physical Resolution for the laptop you created with the barcode # CD01MMDDYYXX (where MM/DD/YY=Month, Day, Year, and XX=Your student number).

Retire Unlocated Assets

SF4.5

- Asset still missing?
- Follow process in Chapter 10: Retire Assets (Lost, Damaged, Destroyed)

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Lesson Summary

You should now be able to:

- Use MobileTrak to create resolutions
- Use Online Forms to create resolutions
- Resolve outstanding resolutions

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Chapter 9:
Dispose (Excess) Assets

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Lesson Objectives

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At the end of this lesson you should be able to:

- Recognize the major differences between the ITA Headquarters, ITA Domestic, ITA International, and the NTIS offices when disposing assets
- Summarize the steps used to create an excess request
- Generate transfer requests for HCHB Moving Contractor and Central Locations
- Generate excess requests for property
- Generate Excess/Inactive Receival Form (Report)
- Generate Assets with Pending Excess/Inactive Requests Report
- Withdraw excess requests
- Review excess assets available for redeployment
- Reserve excess asset for redeployment
- Accept excess asset for redeployment

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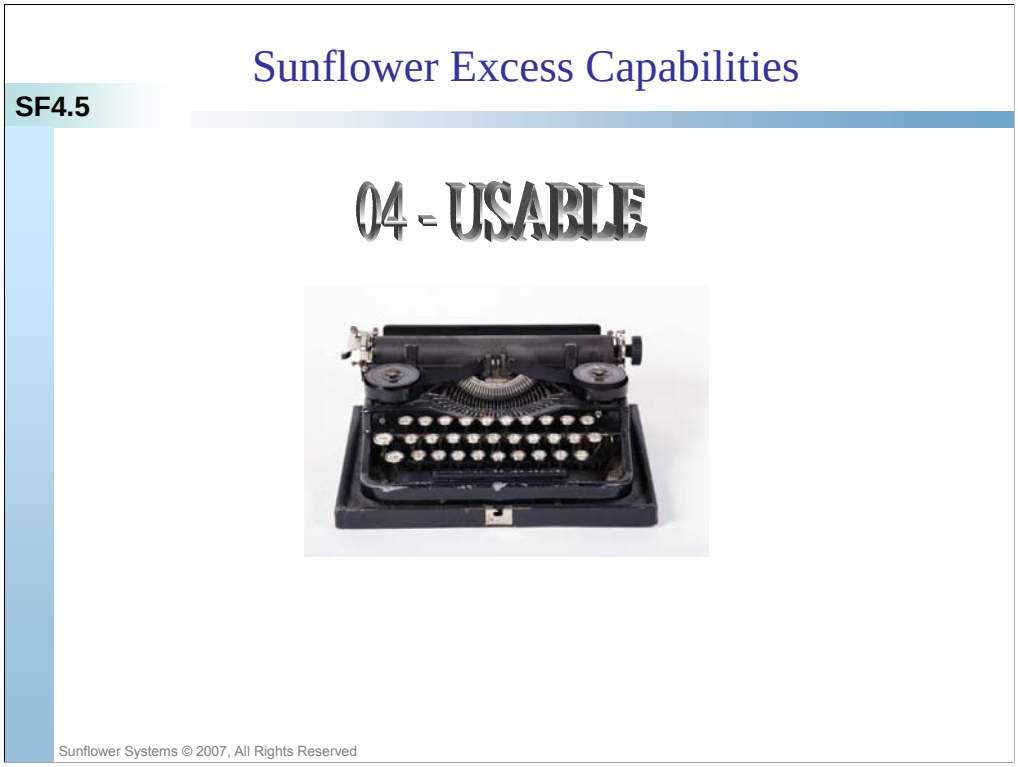
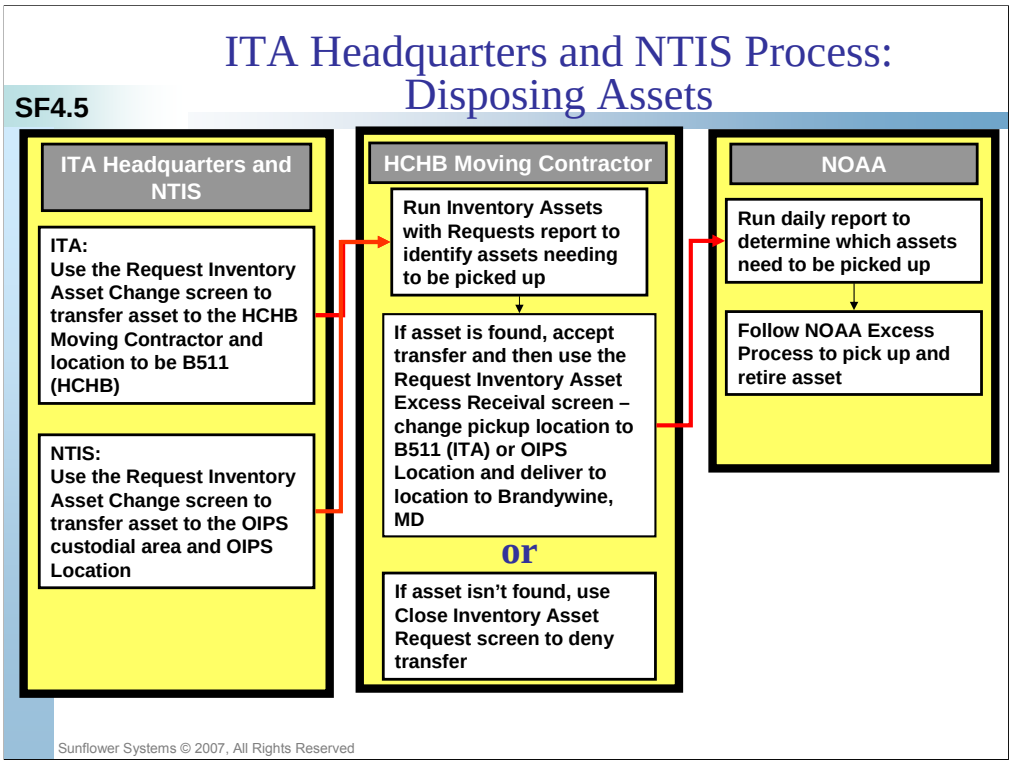


In Sunflower Systems, the process of disposing an asset is referred to as **excess**. In Sunflower Systems, PCs in the DC and Domestic offices generate a transfer request, which kicks off a series of events ending in the asset going to the NOAA Warehouse (either being picked up by NOAA or shipping the asset to NOAA). The NOAA Warehouse process involves scanning the asset which transfers responsibility for the item from the transferring Custodial Area to the NOAA Warehouse. The NOAA Warehouse creates an Excess asset within Sunflower. The Sunflower System provides the capability to:

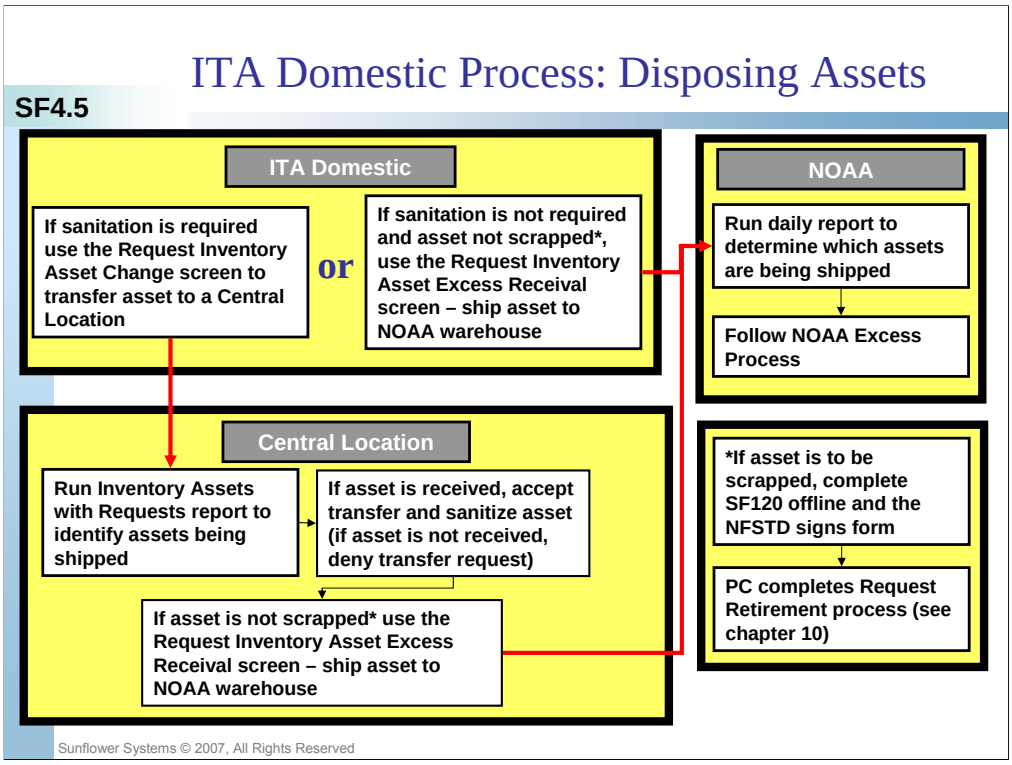
- Deny excess requests;
- Withdraw requests so that the assets may be utilized elsewhere within the DOC;

Additionally if the asset being disposed is located in the International offices, the PC completes the CD52 to request the asset be retired with the supporting documentation regarding sale or scrap and the PMO then approves the request which retires the asset.



ITA – Headquarters and NTIS:

The PC will follow the **Transfer Request** process to request a transfer of the asset being disposed to HCHB Moving Contractor in B511 (ITA) or the OIPS Custodial Area and location (NTIS). HCHB Moving Contractor and OIPS run daily reports to determine assets needing to be picked up. If the asset is found, they then accept the transfer request and complete the Request Inventory Asset Excess Receival request screen to have NOAA pick up the asset for excess. If the asset is not found, then HCHB Moving Contractor or OIPS deny the transfer request. Once NOAA picks up the asset and follows their excess process, the asset is picked up and excessed and the property record in Sunflower is updated with the appropriate information.

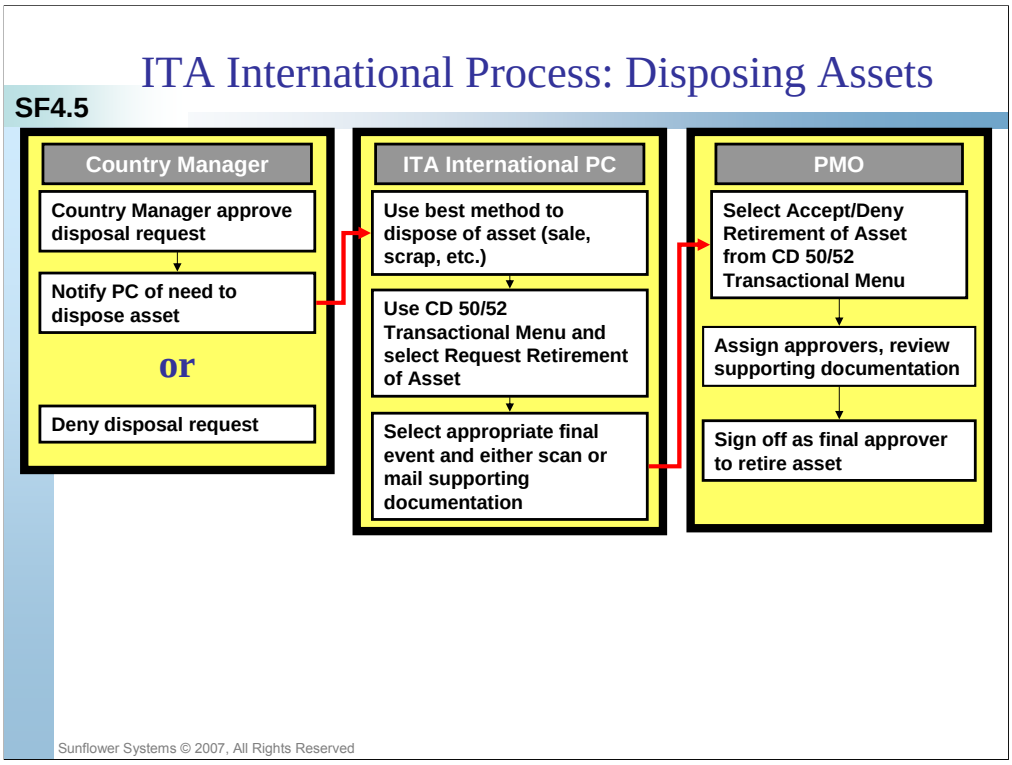


ITA – Domestic:

If asset needs to be sanitized the PC requests a transfer of the asset to the Central Location responsible for sanitizing assets and then ships the asset. The Central Location will deny the transfer request if the asset is not received. Once the asset is sanitized the Central Location completes the Request Inventory Asset Excess Receival screen and ships the asset to the NOAA warehouse.

If the asset does not require sanitation and will be scrapped locally, then the PC should first complete the SF-120 form per ITA requirements and have the director of the National Field Services Team sign and approve the form. The PC must remove all government tags and markings and properly dispose of the asset. ITA also has a Disposition Certification form that the PC must complete to certify that the above has been done. These documents should be either attached to the retirement request or sent under a separate cover to the PMO for review.

Once the asset has been received at the NOAA Warehouse, they follow their Excess process to complete the Excess Request. The property record in Sunflower will be updated with the appropriate information.



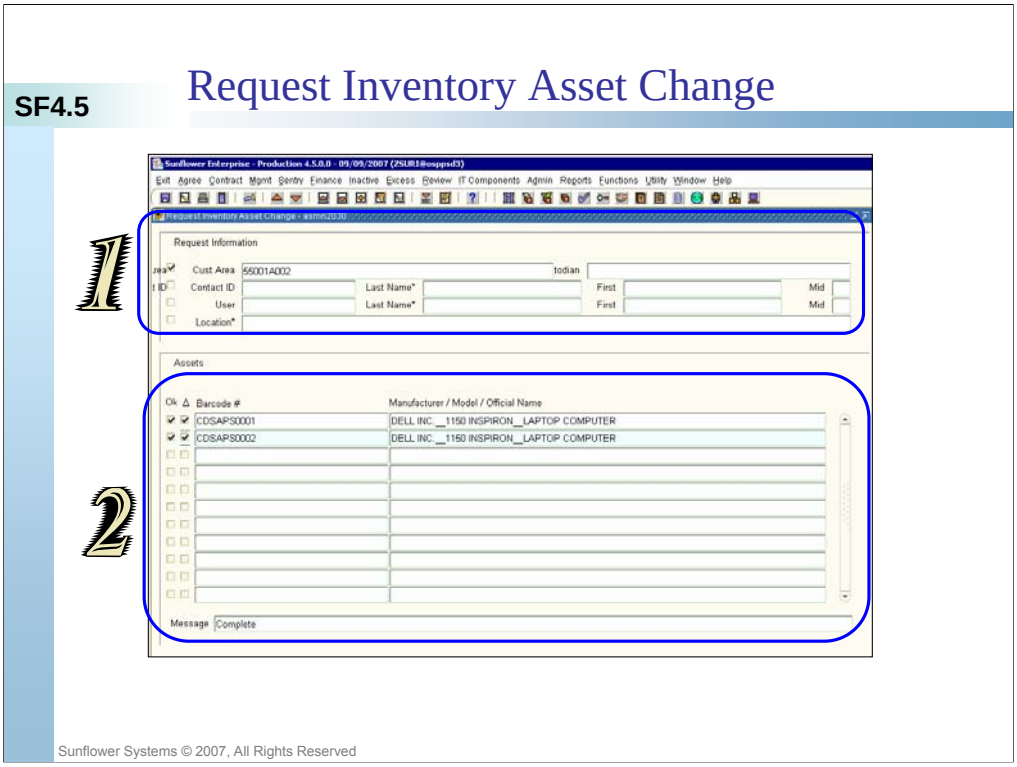
<u>ITA – International:</u>

The Country Manager must first approve the request to dispose of an asset. If he/she denies the request they notify the user.

The PC is responsible for disposing of the asset using the best method (sale, scrap, etc.). The PC will use the CD 50/52 Transactional Menu in Sunflower to select Retirement of Asset. The PC will enter the barcode number and other necessary information. If the PC can scan and attach the supporting documentation, he/she will do so, otherwise the PC will mail the supporting documentation.

The PMO will then use the CD 50/52 Transactional menu in Sunflower and select Accept/Deny Retirement of Asset. Once they have selected approvers and reviewed the supporting documentation, they will approve the disposal of the asset. The property record in Sunflower is then updated to reflect the new status.

For the steps on **Requesting Retirement of Asset** and **Accept/Deny Retirement Request**, please refer to "**Chapter 10: Retire Assets (Lost, Damage, Destroyed)**."



Use the Request Inventory Asset Change screen to transfer assets to HCHB Moving Contractor, OIPS or Central Locations.

Area 1

For **ITA – DC and NTIS**, enter the **HCHB Moving Contractor Custodial Area** or **OIPS Custodial Area** in Area 1. Enter the location as **B511 (ITA)** or **OIPS Location (NTIS).**

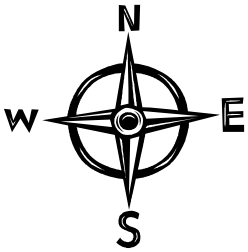
For **ITA – Domestic**, enter the **Central Location's custodial area** in Custodial Area and enter the **related location**.

Area 2

Enter the **Barcode number** of the assets being excessed.

NAV: Request Inventory Asset Change for Excess

SF4.5



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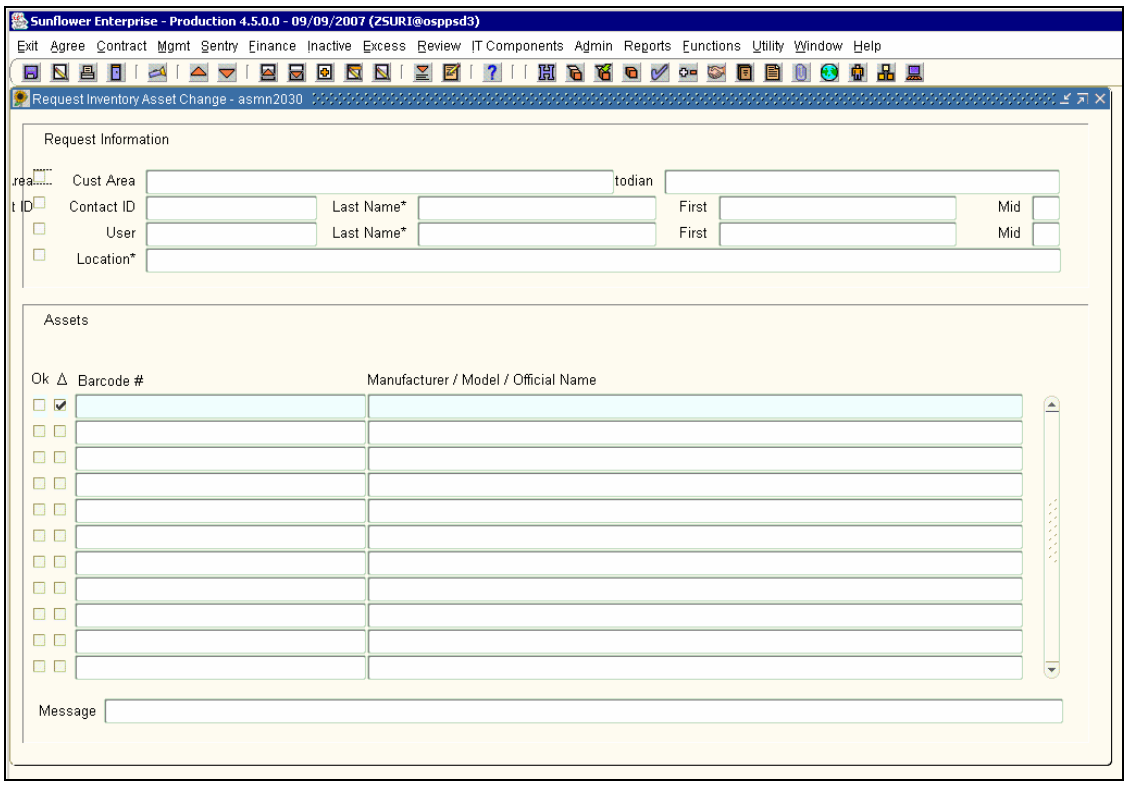
Request Inventory Asset Change for Excess

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



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

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

Field	Description
Cust Area	Enter the Custodial Area where the asset will be transferred to and **Tab.** Note: For ITA – DC, select **HCHB Moving Contractor**. For NTIS, select the OIPS Custodial Area . For ITA – Domestic, select the appropriate **Central Location**.
Property Custodian	Defaults based on the Custodial Area entered
Contact ID	If known, select the **Last Name** from the list of values, and then

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	select a **First** name from the LOV. This will automatically populate the Contact ID's badge number in the **Custodian** field. Note: The requested Custodian must be different than the Custodian currently listed on the record. You will not be able to save the record if these are the same.
User	If known, select the **Last Name** of the **User** from the list of values, and then select a **First** name from the LOV. This will automatically populate the User's badge number in the **User** field. Note: The requested User must be different than the User currently listed on the record. You will not be able to save the record if these are the same.
Location	Select this field to launch the **Location** sub-form. For ITA – DC, select **B511**. For NTIS, select the OIPS Location. For ITA – Domestic, select the appropriate **Central Location**.

2. Select the blue-highlighted **Barcode Number** field in the **Assets** portion of the screen.

3. Enter the barcode number of the property record to be changed, and then **Tab** out of the field.

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

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

4. Enter additional barcode numbers in the **Barcode Number** fields if more than one asset is being excessed.

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

Result: The transfer request will be sent to either the HCHB Moving Contractor or Central Location who will be receiving the asset.

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

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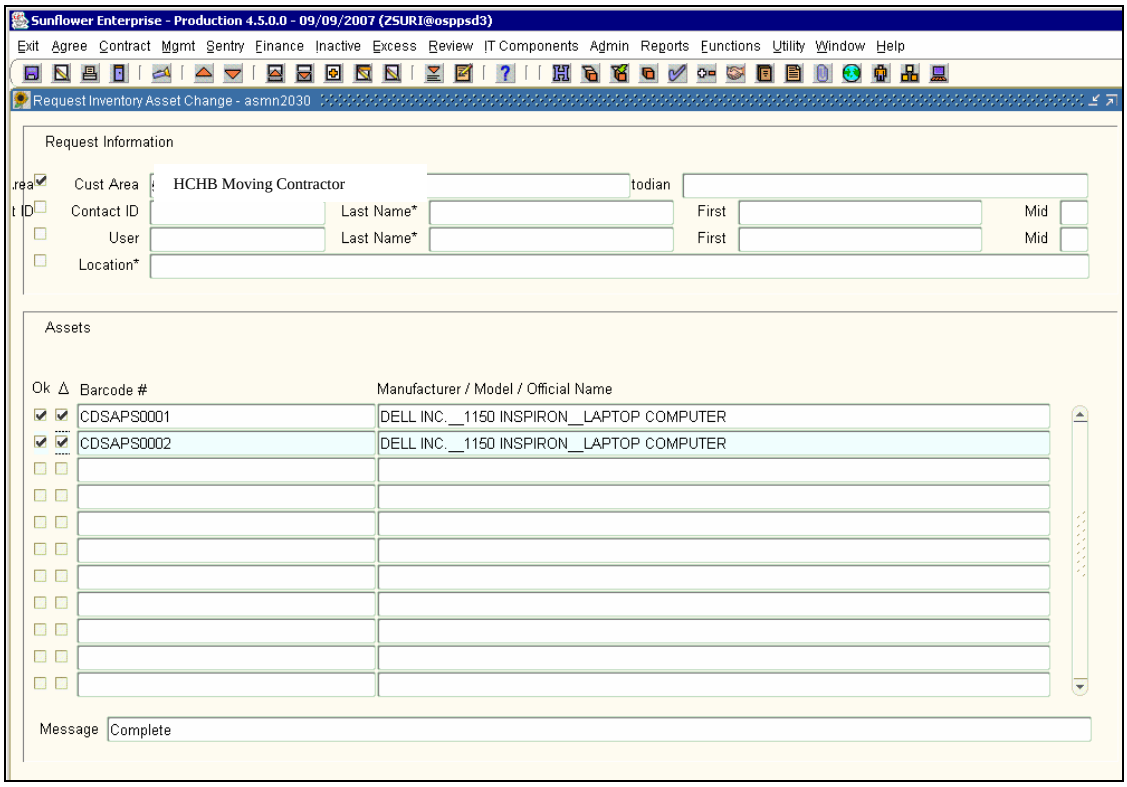

End of activity.

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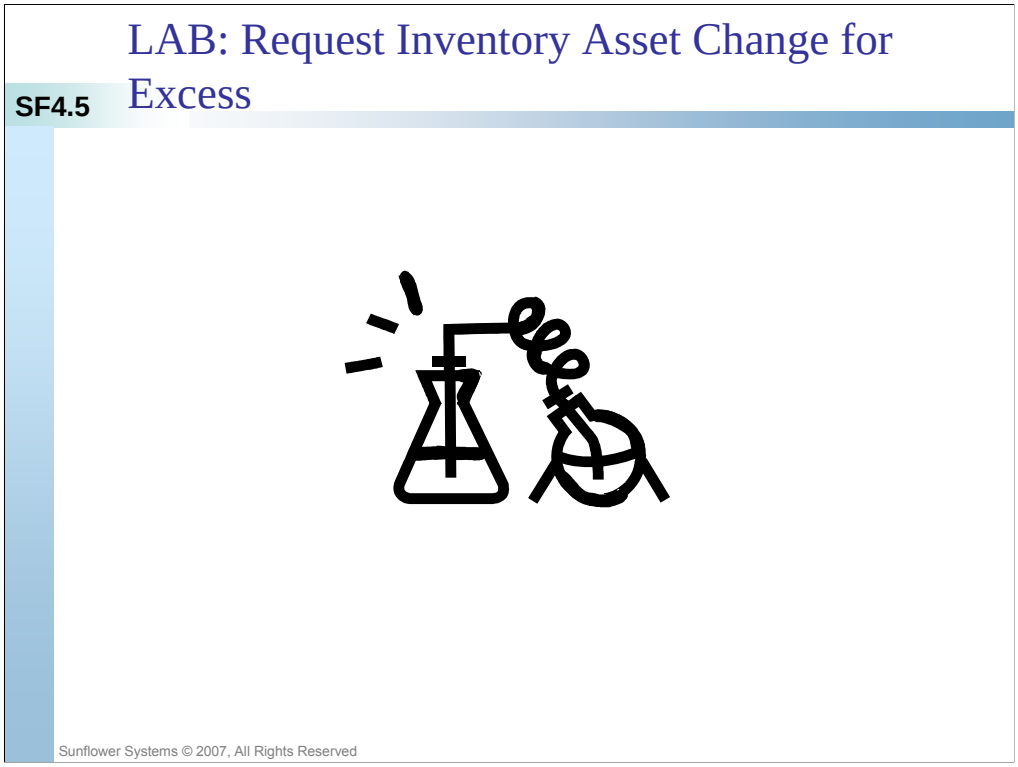
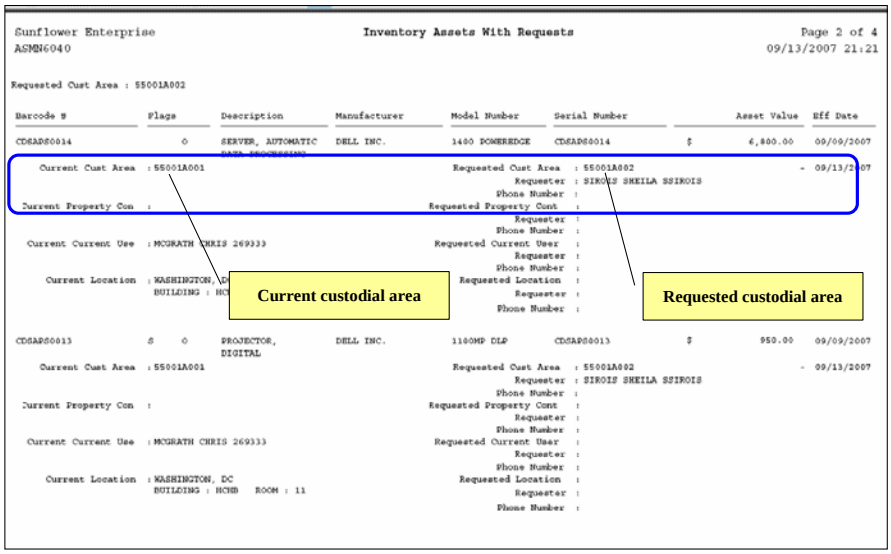


Request to transfer the Dell Inspiron 3500 laptop, barcode # CD01MMDDYYXX (where MM=Month, DD=Day, YY=Year and XX=Student Number) to the HCHB Moving Services custodial area.

SF4.5

Assets with Pending Requests



Sunflower Enterprise
ASMN6040

Inventory Assets With Requests

Page 2 of 4
09/13/2007 21:21

Requested Cust Area : 55001A002

Barcode #	Flags	Description	Manufacturer	Model Number	Serial Number	Asset Value	Eff Date
CDSAPS0014	◇	SERVER, AUTOMATIC DATA PROCESSING	DELL INC.	1400 POWEREDGE	CDSAPS0014	$ 6,800.00	09/09/2007
Current Cust Area : 55001A001				Requested Cust Area : 55001A002			- 09/13/2007
				Requester : SIROIS SHEILA SSIROIS			
				Phone Number :			
Current Property Con :				Requested Property Cont :			
				Requester :			
				Phone Number :			
Current Current Use : MCGRATH CHRIS 269333				Requested Current User :			
				Requester :			
				Phone Number :			
Current Location : WASHINGTON, DC				Requested Location :			
BUILDING : HCHB				Requester :			
				Phone Number :			
CDSAPS0013	S ◇	PROJECTOR, DIGITAL	DELL INC.	1100MP DLP	CDSAPS0013	$ 950.00	09/09/2007
Current Cust Area : 55001A001				Requested Cust Area : 55001A002			- 09/13/2007
				Requester : SIROIS SHEILA SSIROIS			
				Phone Number :			
Current Property Con :				Requested Property Cont :			
				Requester :			
				Phone Number :			
Current Current Use : MCGRATH CHRIS 269333				Requested Current User :			
				Requester :			
				Phone Number :			
Current Location : WASHINGTON, DC				Requested Location :			
BUILDING : HCHB ROOM : 11				Requester :			
				Phone Number :			

Current custodial area

Requested custodial area

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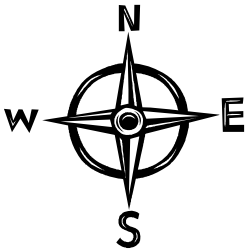
The HCHB Moving Contractor, OIPS, and Central Locations will run the **Inventory Assets with Requests** report to identify which assets are being transferred or sent to them for excess. The HCHB Moving Contractor and OIPS will use this report to identify which assets to go pick up. The Central Location will run this report to identify which assets are being shipped to them.

NAV: Inventory Assets with Requests for Excess

SF4.5



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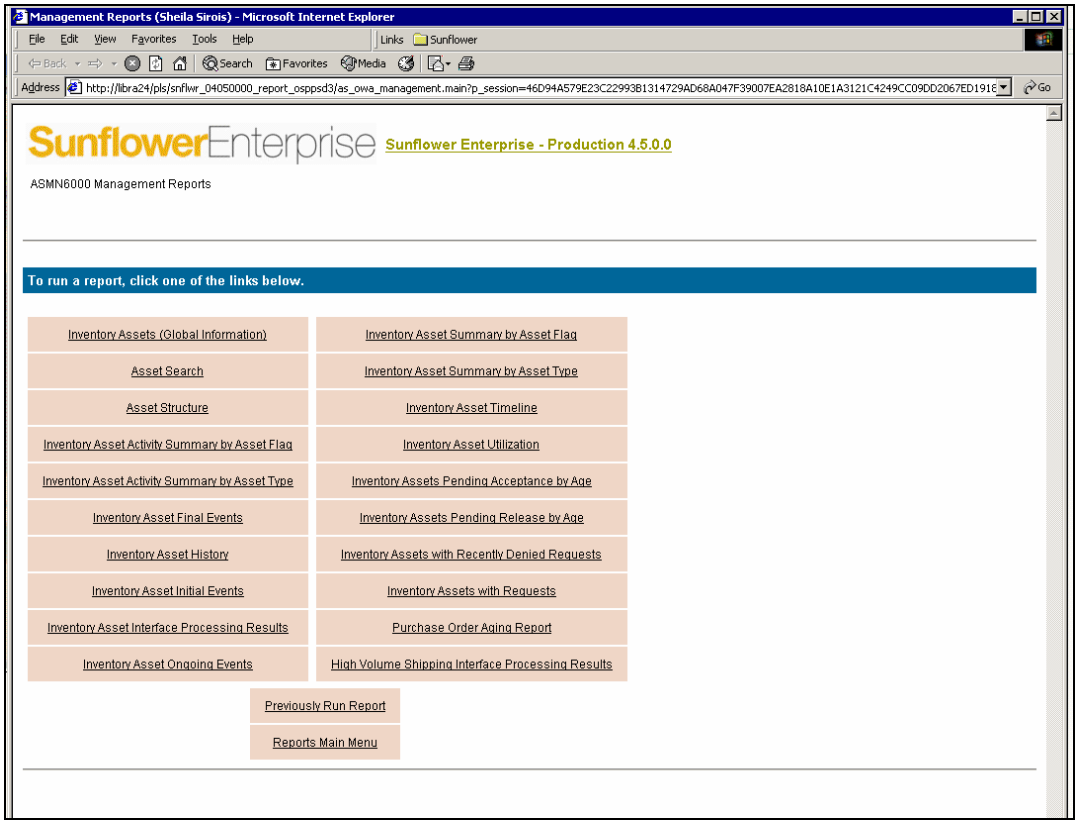
Generate Report for Inventory Assets with Requests

Inventory Clerk
M > Mgmt > Management Reports
Management Reports



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

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

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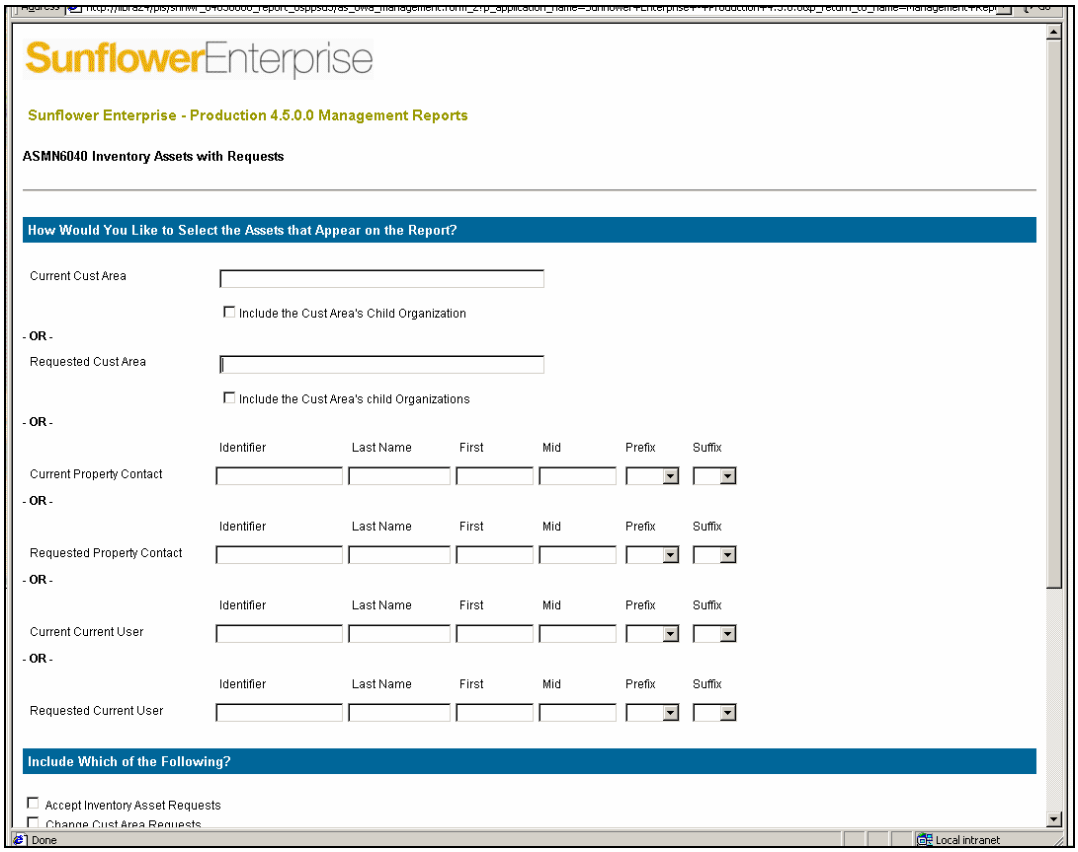

2. Enter your Custodial Area in the **Requested Cust Area** field to view all assets being transferred to you.

Note: ITA – DC will enter the HCHB Moving Contractor custodial area NTIS will enter the OIPS custodial area, and ITA – Domestic will enter the Central Location custodial area.

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

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

4. Sort as needed.

5. Select the **Submit** button.

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

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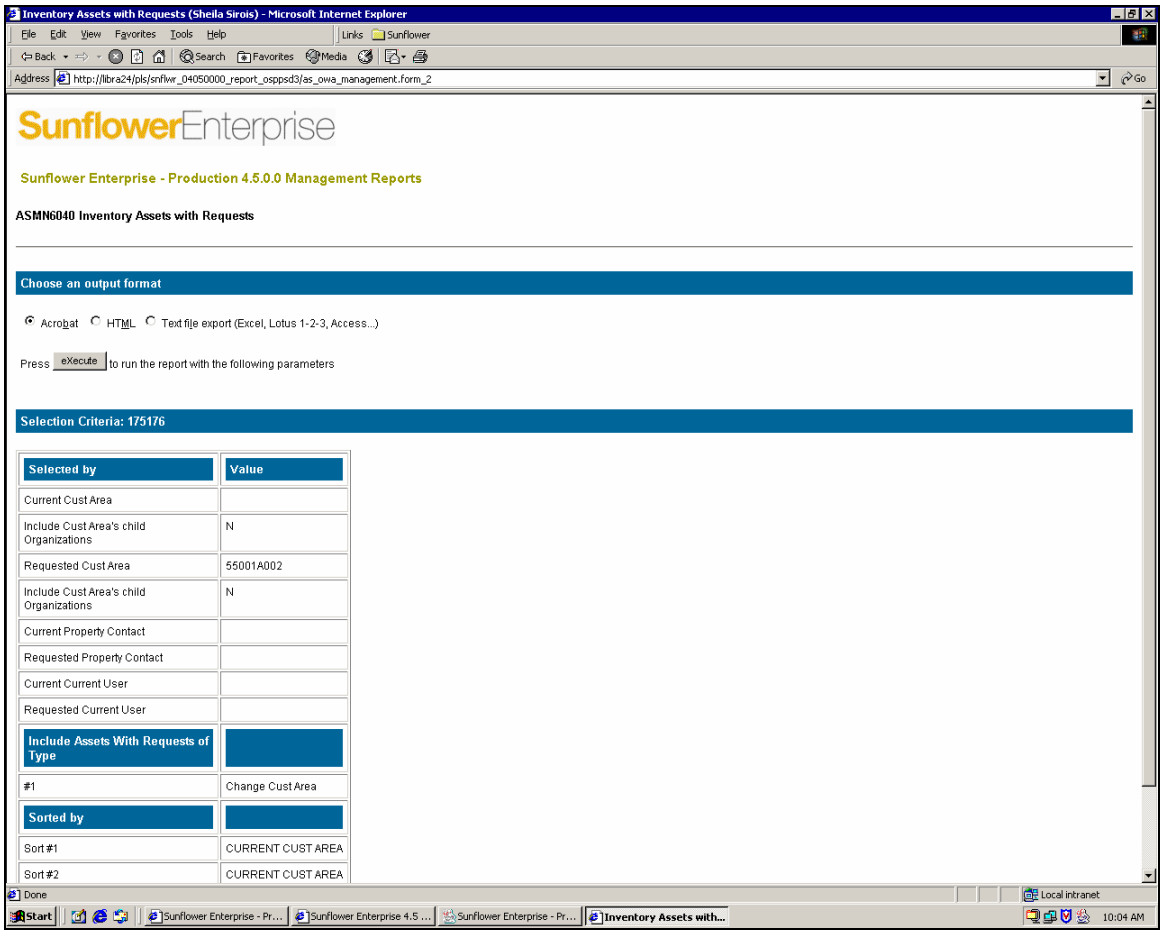

6. Select the **Acrobat** radio button.

7. Review your parameters and select the **eXecute** button.

Result: A report is opened in a separate window.

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Sunflower Enterprise — **Inventory Assets With Requests** — Page 2 of 3
ASMN6040 — 09/09/2007 10:06

Requested Cust Area : 55001A002

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

End of activity.

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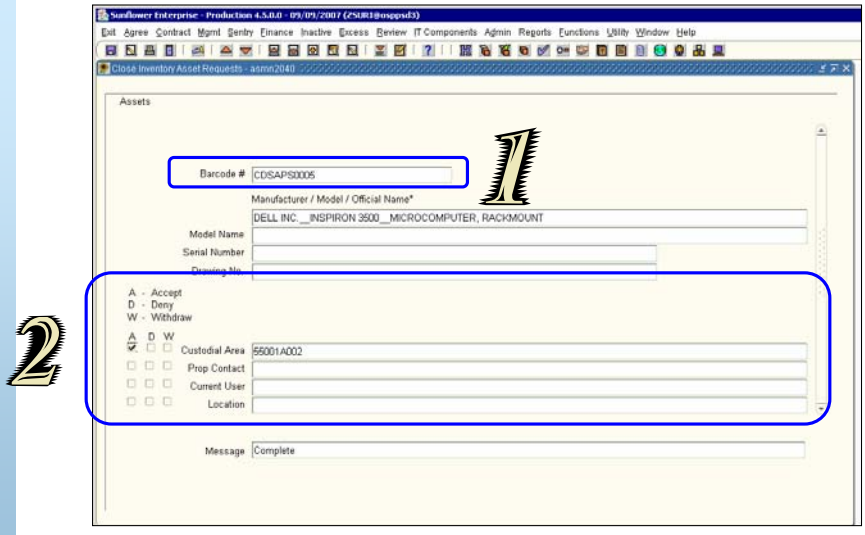
SF4.5

Close Inventory Asset Request



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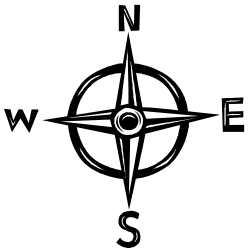
In **Area 1**, either the HCHB Moving Contractor, OIPS or the Central Location will enter the asset's **barcode number**.

In **Area 2**, they will either select **A** for **Accept** or **D** for **Deny**. The request is accepted if the HCHB Moving Contractor or OIPS was able to find and pick up the asset and if the Central Location received the asset. The request is denied if the asset was either not able to be picked up by the HCHB Moving Contractor or OIPS, or was never received by the Central Location.

NAV: Close Inventory Asset Request for Excess

SF4.5



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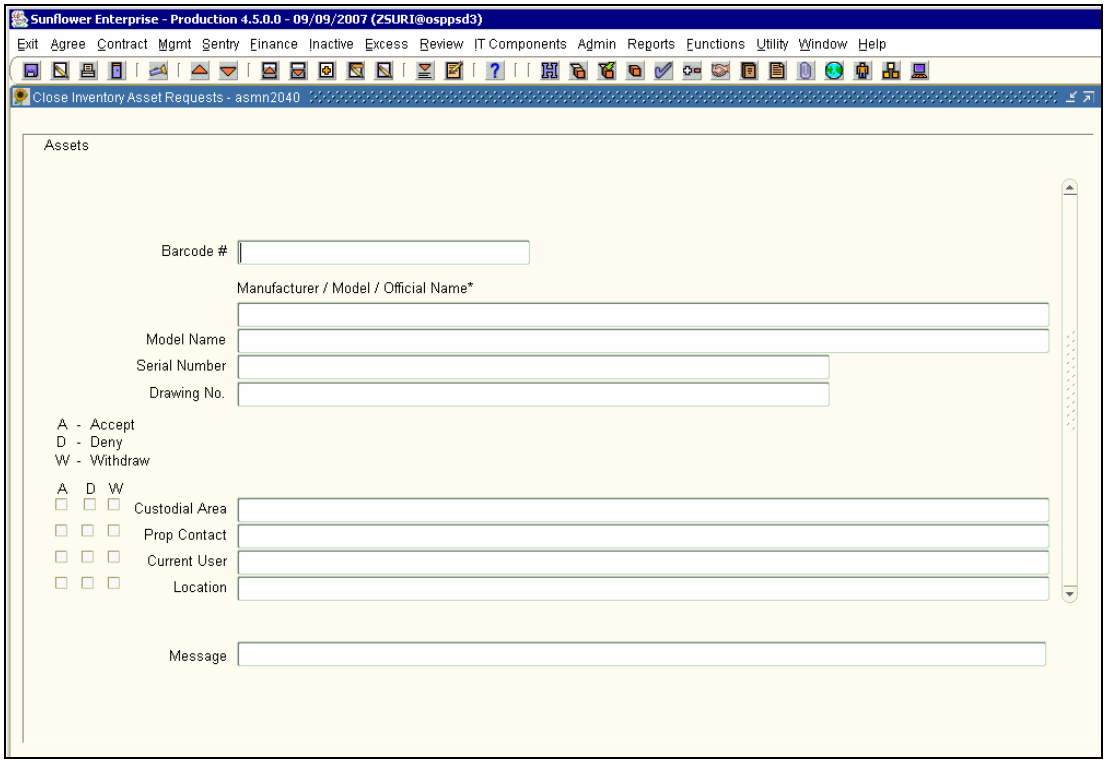
Close Inventory Asset Request for Excess

Inventory Clerk
M > Mgmt > Close Inventory Asset Requests
Close Inventory Asset Requests



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

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

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

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

Select:

- **A** to Accept

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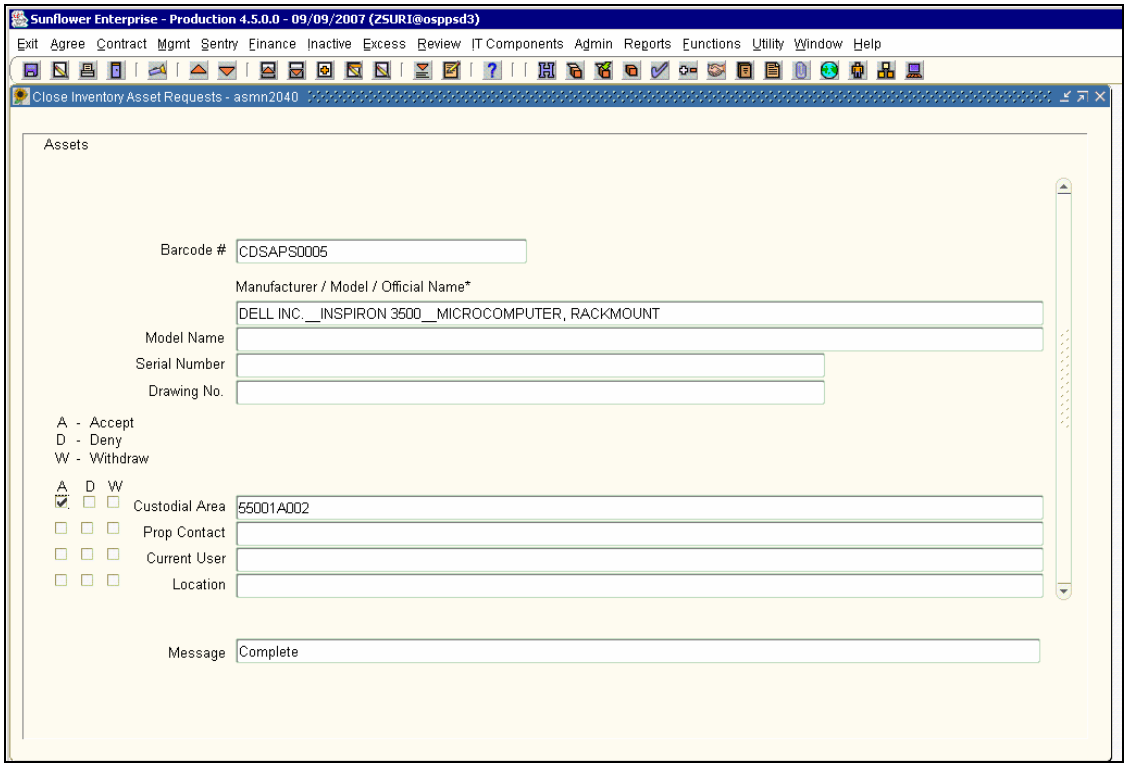
– **D** to Deny (select if asset is not available for pickup or asset was never received)

Field	Description
Custodial Area	The applicable custodial area for the HCHB Moving Contractor, OIPS, or the Central Location receiving the asset.
Property Contact	The name of the new property contact.
User	The name of the new user.
Location	The new location.

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

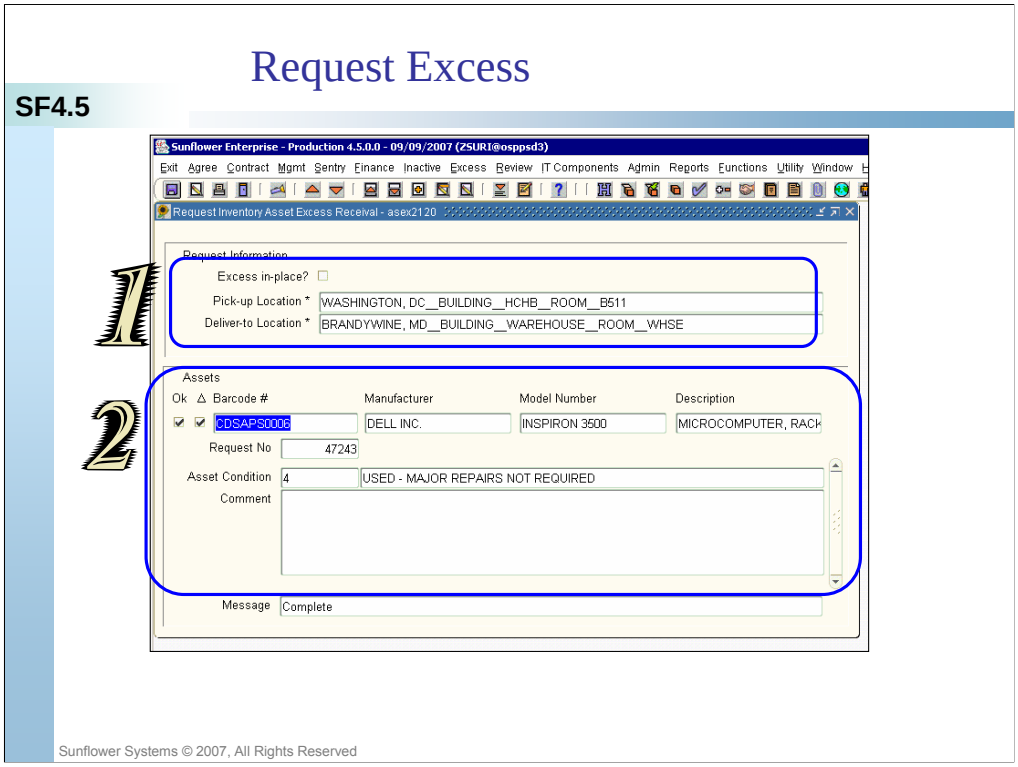
Result: The transfer request is accepted/ denied.

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



End of activity.

Sunflower Systems © 2007, All Rights Reserved



The HCHB Moving Contractor, OIPS and ITA Central Locations will use the **Request Inventory Asset Excess Receival** screen to request an asset be excessed.

Area 1 Enter information about where the asset should be picked up. Only change this field if it is different than what is currently on the property record.

- For ITA – DC, select the Pick-up Location as B511 and the Deliver-to Location as Brandywine, MD.
- For NTIS, select the OIPS Location and the Deliver-to Location as Brandywine, MD.
- For ITA – Domestic, select the Pick-up Location as the Domestic Location (if no sanitization is required) or the Central Location (if sanitization is required) and the Deliver-to Location as Brandywine, MD.

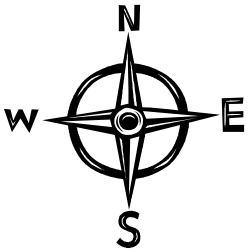
Area 2 Enter the **Barcode Number, Asset Condition,** and **Comments** here (an example of a comment might be: "Contact Tina Sedgwick at 202-555-1212 for important information about this asset.") The **Request Number** will be automatically generated once the record is saved.

Important Note: Take note of the **Request Number** once you save the record. This number will be used to generate the **Excess Receival Report**. If you do not note the request number, however, you can run the **Assets with Pending Excess/Inactive Requests** report to determine which assets are pending excess pickup.

Note: You cannot print an Excess Receival Report Form directly from this screen. You must run the report **Excess/Inactive Receival Form** to print the request. (The request number can be used to filter the report.) This form may be required in the future to be attached to the property item in order for the item to be picked up.

NAV: Create Excess Request in Sunflower

SF4.5



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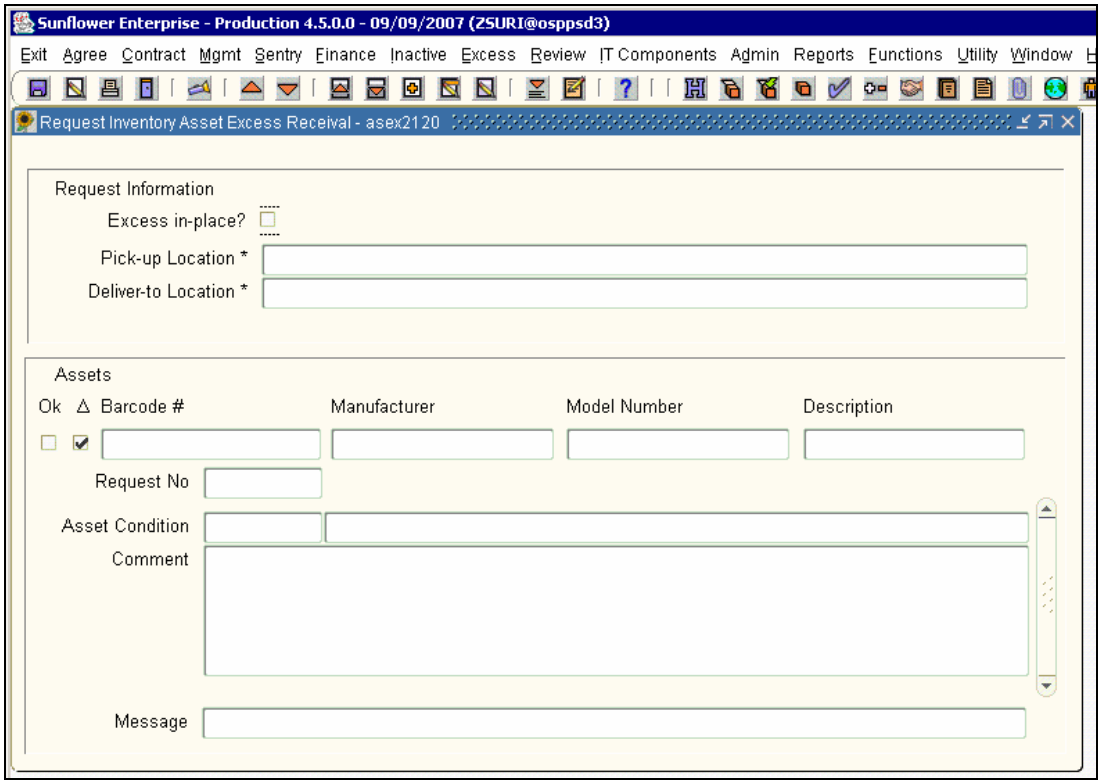
Create Excess Request in Sunflower

Inventory Clerk M > Excess > Request Excess Receival > Request Inventory Asset Excess Receival Request Inventory Asset Excess Receival



1. Double click on the **Pick-up Location** field and enter the Location. **Save** the Location record when complete.

Note: For ITA – DC, select B511. For NTIS, select the OIPS location. For ITA – Domestic, select the appropriate Domestic Location or Central Location (if asset needed to be sanitized).

2. Double click on the **Deliver-to Location** field and enter Brandywine, MD. **Save** the location record when complete.

3. In the **Barcode Number** field, enter the decal number of the asset that is to be excessed and **Tab**.

Result: The catalog and condition details will be autofilled.

4. Optionally, use the **Asset Condition** field to change the condition of the asset by selecting a value from the LOV.

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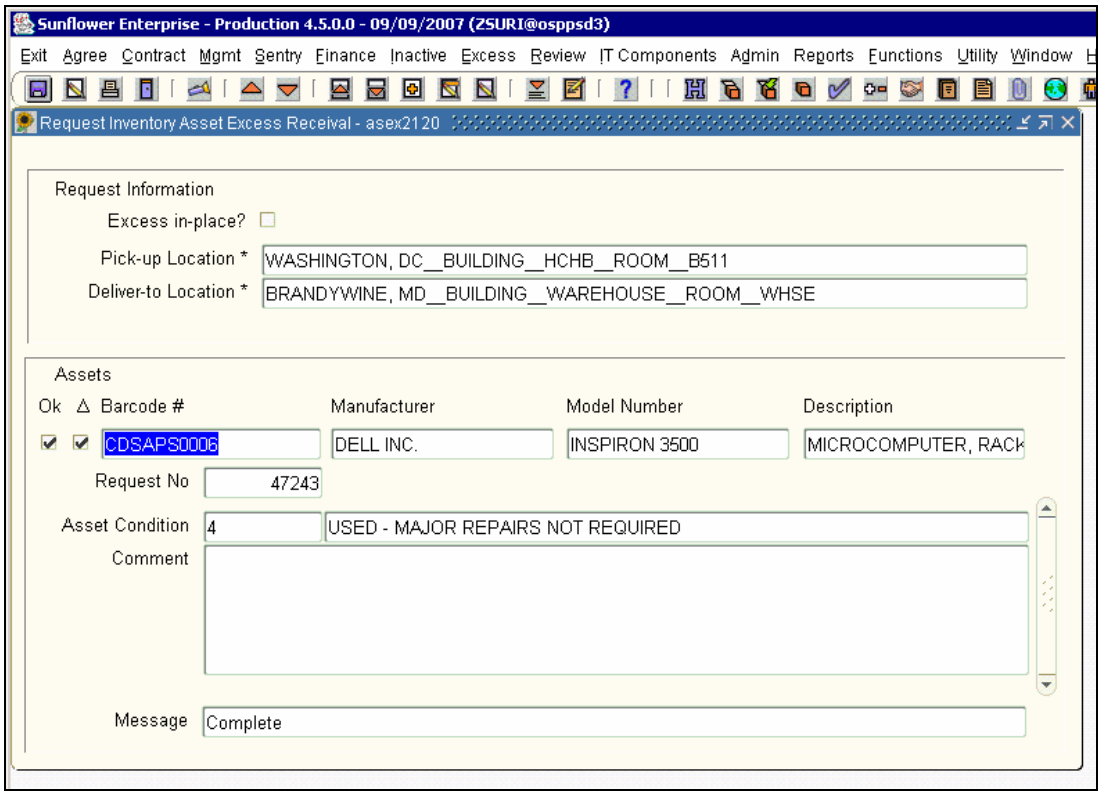
5. Optionally, enter **Comments** (e.g. instructions to the driver, special handling instructions, etc.)

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

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

8. Make a note of the **Request Number** so you can keep track of the request.

Note: You will use the Request Number to print the Excess Receival Form.



End of activity.

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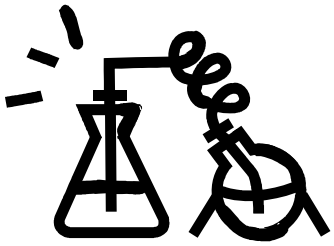
SF4.5

LAB: Create Excess Request in Sunflower



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Create an excess request in Sunflower for the second asset you created in Chapter 3 - Barcode # CD02MMDDYYXX (where MM=Month, DD=Day, YY=Year and XX=Student Number).

Make note of the **Request Number:_____**

Excess Receival Form

SF4.5

Sunflower Enterprise
Excess Receival Form
09/10/2007 14:54

Request No. : 48258
Requestor : ROBI SIMAIN INUKI
Date : 09/10/2007
Phone :
Alternate Phone :

Barcode # : INV CD0000418808
Manufacturer : INTERMEC TECHNOLOGIES CORPORATION
Description : OPTICAL READER, DATA, HAND HELD
Model Number : 700C
Fed. Supply : GENERAL PURPOSE ADPE INCL.
Group : SOFTWARE, SUPPLIES AND SUPPORT
Sub :
Quantity :
Description :
Serial Number : 2970080204
Value : 0 1,004.00
Flags : 0 0
Acquisition Date : 05/25/2005
Bureau or : 51
Property : 51NAOA
Region
Accountability
Office :
Property :
Custodian
Phone :
Cost Area : 51NAOA
Property :
Contact :
Alternate Phone :
Asset : NEW OR UNUSED
Condition

Pick-up Location
WASHINGTON, DC
BUILDING : HCHB ROOM : 1411

Delivery-to Location
BRANCHVILLE, MD
BUILDING : WAREHOUSE

Comment :

HAZARDOUS WASTE APPROVAL _____ DATE _____

TRANSPORTATION APPROVAL _____ DATE _____

ASSET CENTER REPRESENTATIVE APPROVAL _____ DATE _____

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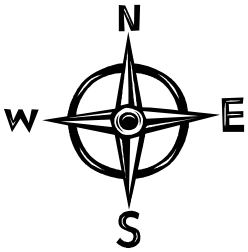
The **Excess Receival Form** serves as a print out of the excess pick-up request and can be affixed to property items for excess pickup. In the future, DOC may require this form to be attached to assets being sent to the NOAA warehouse.

NAV: Generate Excess/Inactive Receival Form

SF4.5



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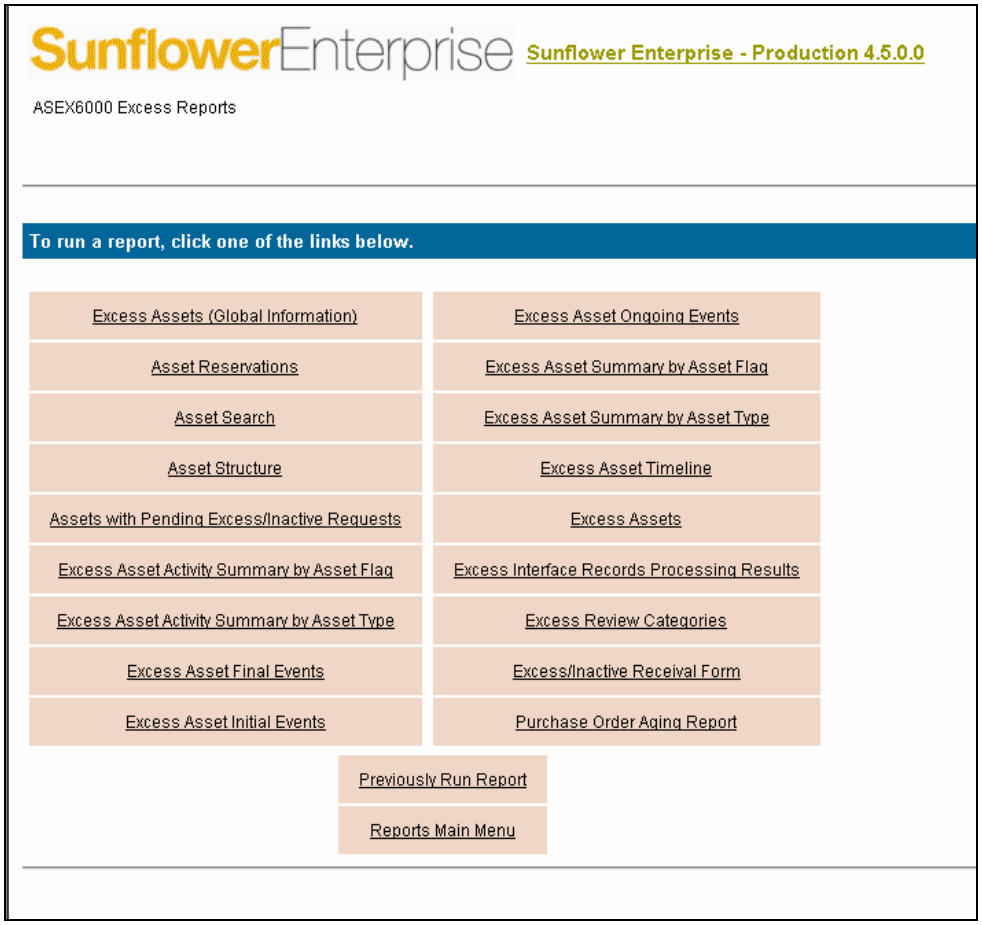
Generate Excess Receival Form

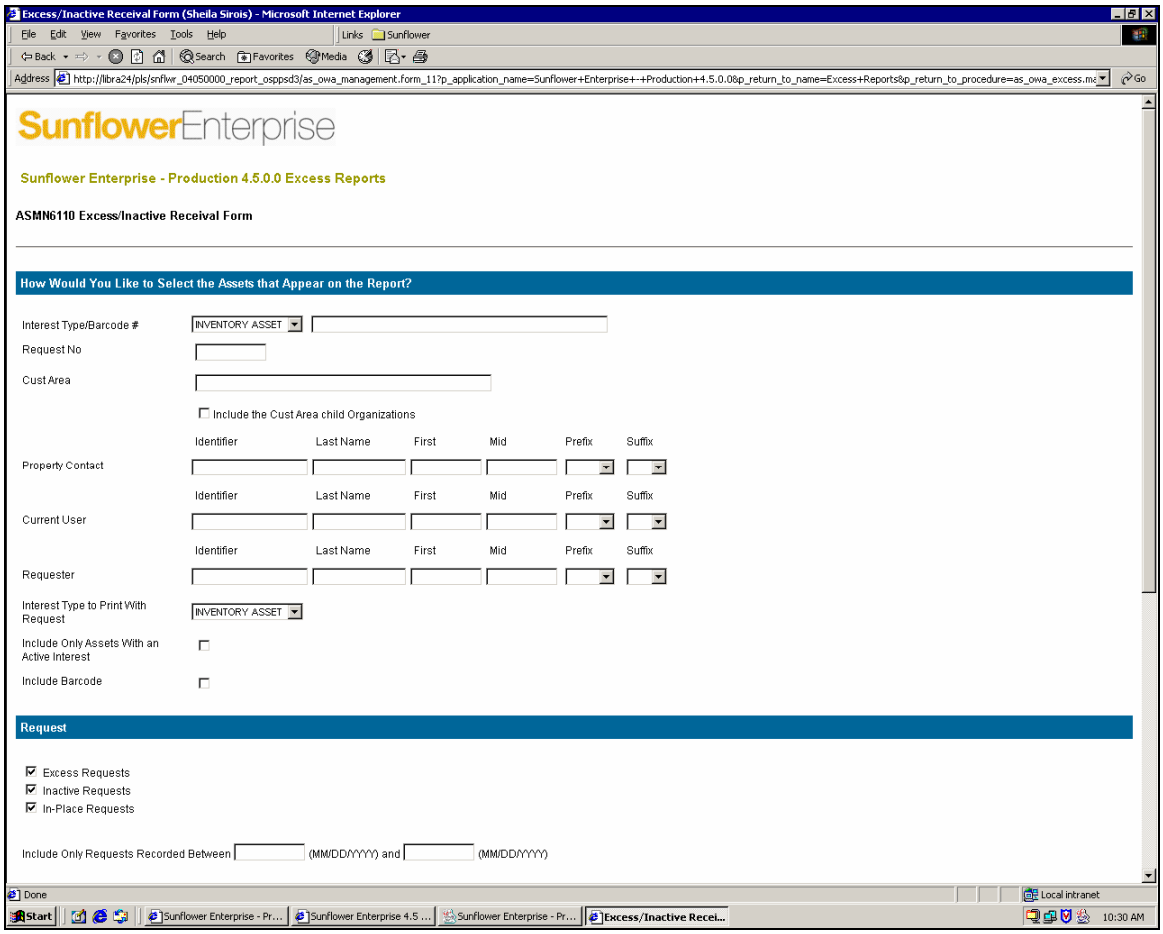
Inventory Clerk
M > Excess > Excess Reports
Excess Reports



1. Select **Excess/Inactive Receival Form.**

Result: The **Excess/Inactive Receival Form** parameters window displays:

Sunflower Systems © 2007, All Rights Reserved



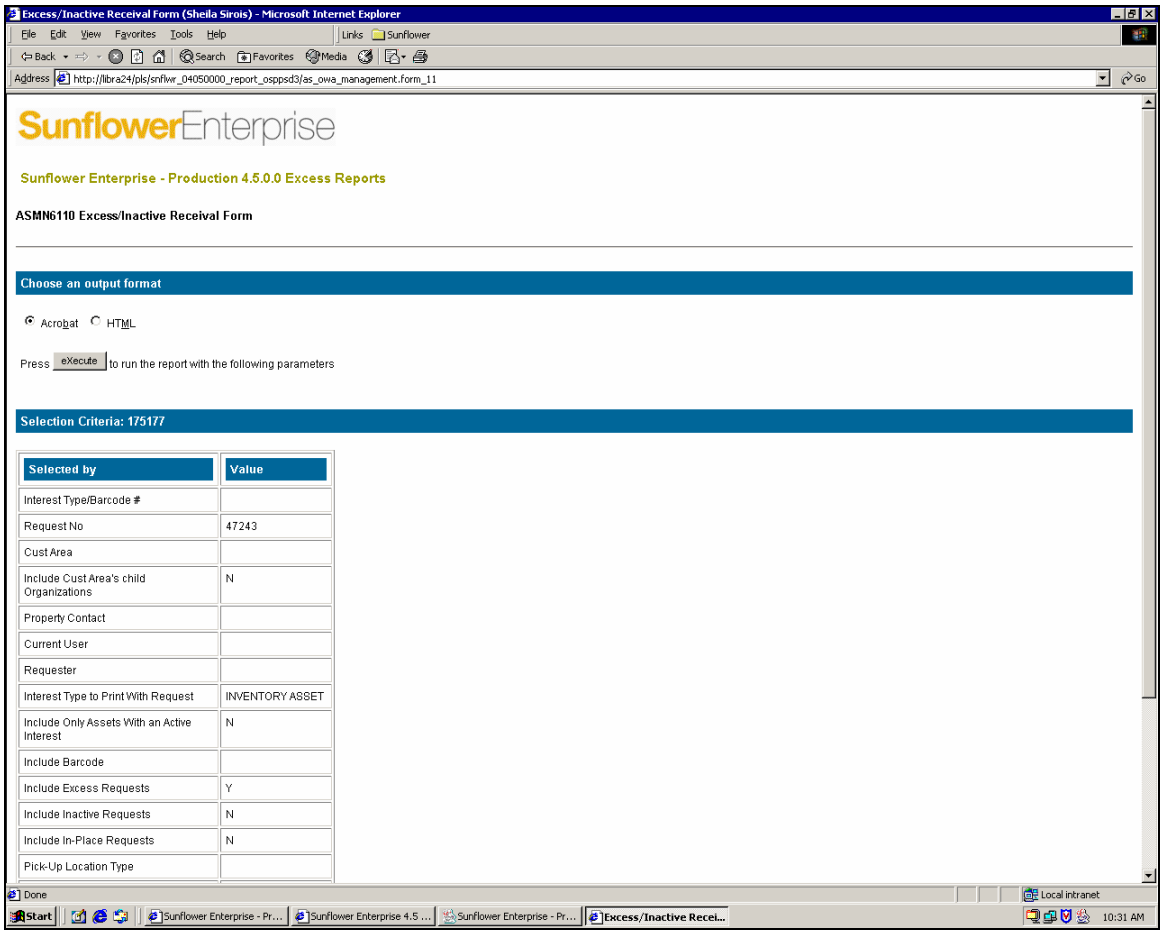
2. Specify the **Request No** of the request for Excess Asset.

3. Uncheck the **Inactive Request**, **In-Place Request** boxes.

4. Select the **Submit** button.

<u>Result:</u> A window displays that allows you to review the report parameters:

Sunflower Systems © 2007, All Rights Reserved



5. Select the **Acrobat** radio button.

6. Review your parameters and select the **eXecute** button.

Result: A report is opened in a separate window.

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Sunflower Enterprise **Excess Receival Form**
ASMN6110 09/10/2007 14:54

45259

Request No : 45259
Requester : SURI ZUBAIR ZSURI Phone :
Date : 09/10/2007 Alternate Phone :

Barcode # : INV CD0000915505
Manufacturer : INTERMEC TECHNOLOGIES CORPORATION
Description : OPTICAL READER, DATA, HAND HELD
Model Number : 700C
Fed. Supply Group : GENERAL PURPOSE ADPE INCL. SOFTWARE, SUPPLIES AND SUPPORT
UoM :
Quantity :
Description :
Serial Number : 26800500236
Value : $ 1,804.00
Flags : S O
Acquisition Date : 08/28/2005
Bureau or Region : 51
Property : 510A0A
Accountability Office
Property Custodian :
Cust Area : 510A0A
Phone :
Property Contact :
Alternate Phone :
Asset Condition : NEW OR UNUSED

Pick-up Location
WASHINGTON, DC
BUILDING : HCHB ROOM : 1311

Deliver-to Location
BRANDYWINE, MD
BUILDING : WAREHOUSE :

Comment :

HAZARDOUS WASTE APPROVAL _____ DATE _____

TRANSPORTATION APPROVAL _____ DATE _____

ASSET CENTER REPRESENTATIVE APPROVAL _____ DATE _____

Note: You do not need to print the first and last pages of the document, only the page with the bar code.

End of activity.

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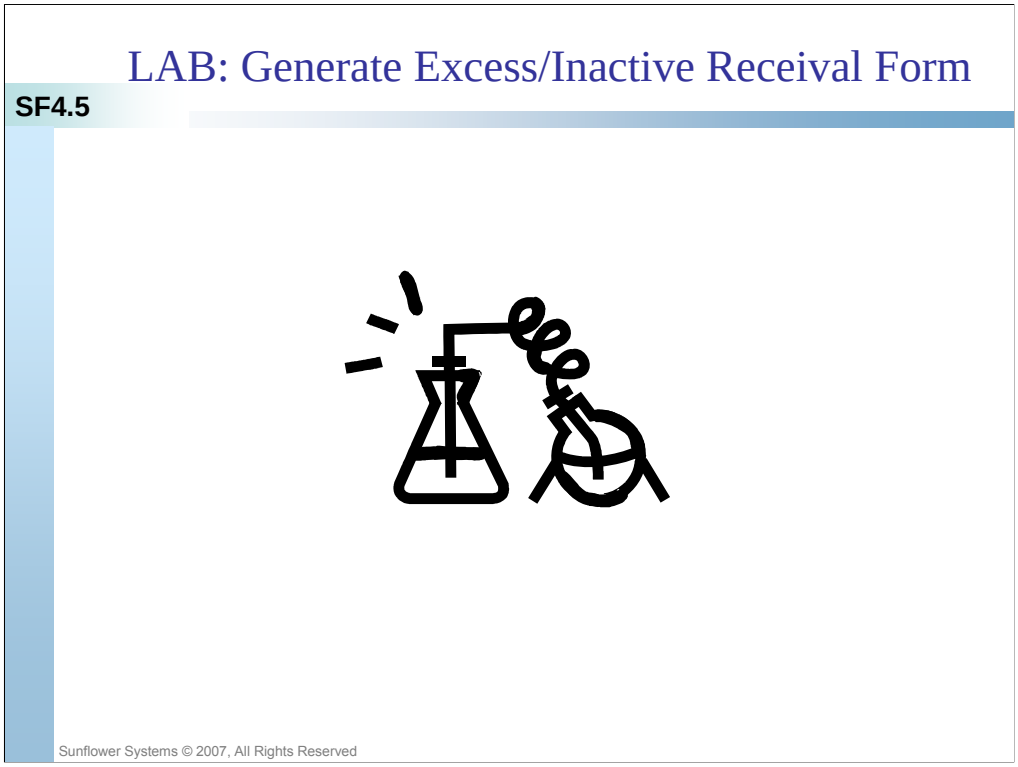

Generate the Excess Receival form using the request number from your previous lab.

Assets with Pending Excess/Inactive Requests Report

SF4.5

Sunflower Enterprise **Assets With Pending Excess/Inactive Requests** Page 2 of 3
ASMN6100 09/09/2007 10:39

Request No	Barcode #	Flags	Description	Manufacturer	Model Number	Serial Number	Asset Value
47243	INV CDEAP00006	S O	MICROCOMPUTER, RACKMOUNT	DELL INC.	INSPIRON 3500		$ 3,500.00

Asset Condition : 4 USED - MAJOR REPAIRS NOT REQUIRED
Cust Area : 55001A001
Property Contact :
Current User : MCGRATH CHRIS 269333
Pick-up Location : WASHINGTON, DC
BUILDING : HCHB ROOM : E511

Request : EXCESS RECEIVAL - 09/09/2007
Requester : SIROIS SHEILA SSIROIS
Requester Phone :
Deliver-to Location : BRANDYWINE, MD
BUILDING : WAREHOUSE ROOM : WHSE

Total : 1 $ 3,500.00
Report Total : 1 $ 3,500.00

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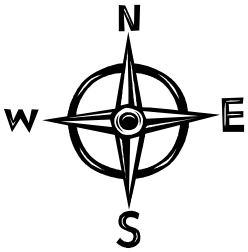
The **Assets with Pending Excess/Inactive Requests** report can be used by the HCHB Moving Contractor, OIPS, ITA – Domestic PC, or the Central Location to determine which assets still have pending excess requests. This will be helpful in determining if the NOAA Warehouse has received the assets yet.

SF4.5

NAV: Generate Report for Assets with Pending Excess Requests



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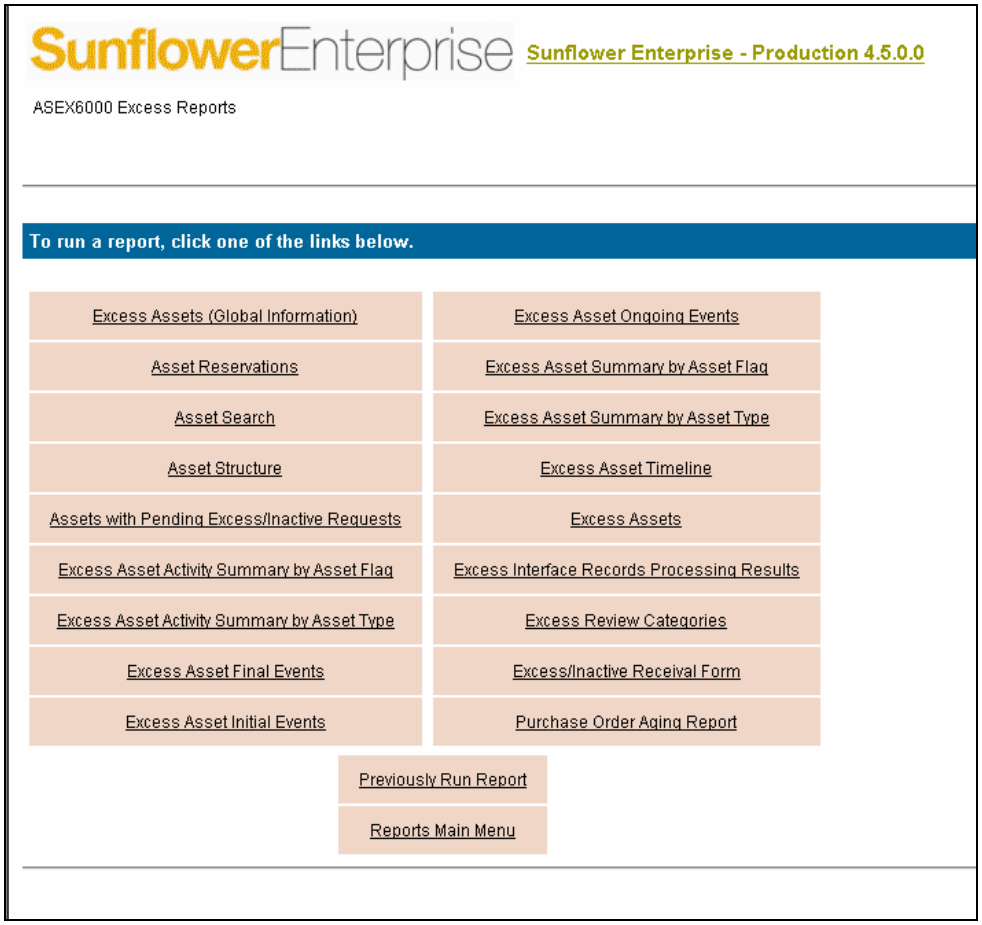
Generate Report for Assets with Pending Excess Requests

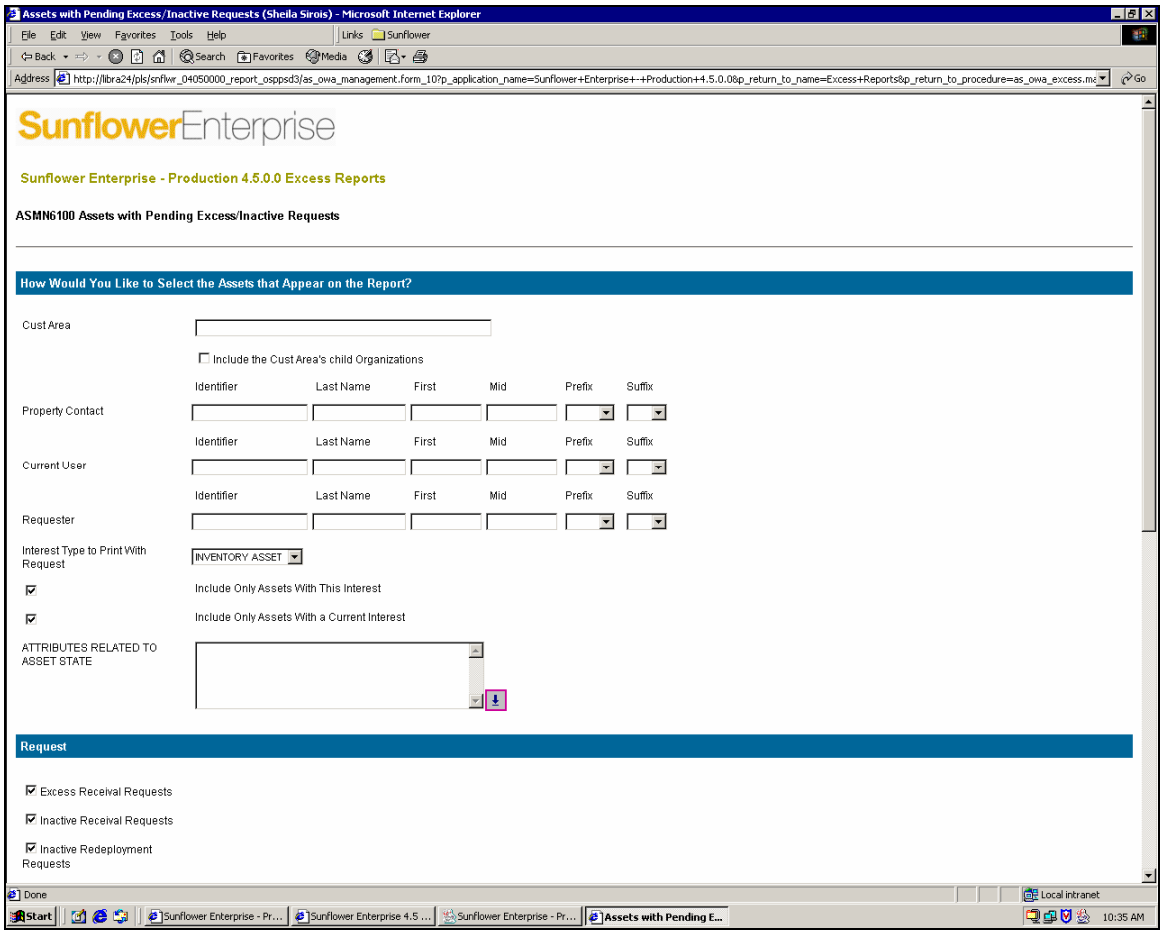
Excess Clerk
M > Excess > Excess Reports
Excess Reports



1. Select **Assets with Pending Excess/Inactive Requests.**

Result: The **Assets with Pending Excess/Inactive Requests** parameters window displays:

Sunflower Systems © 2007, All Rights Reserved



2. In the **Include Only Request Recorded Between** fields (scroll down the page to view), specify the *Date Range* of the request for Excess Assets.

3. Specify the **Pick-Up Location** information of the request for Excess Assets.

<u>Note:</u> Select HCHB Moving Contractor, OIPS Location, or Central Location.

4. Select the **Submit** button.

<u>Result:</u> A window displays that allows you to review the report parameters:

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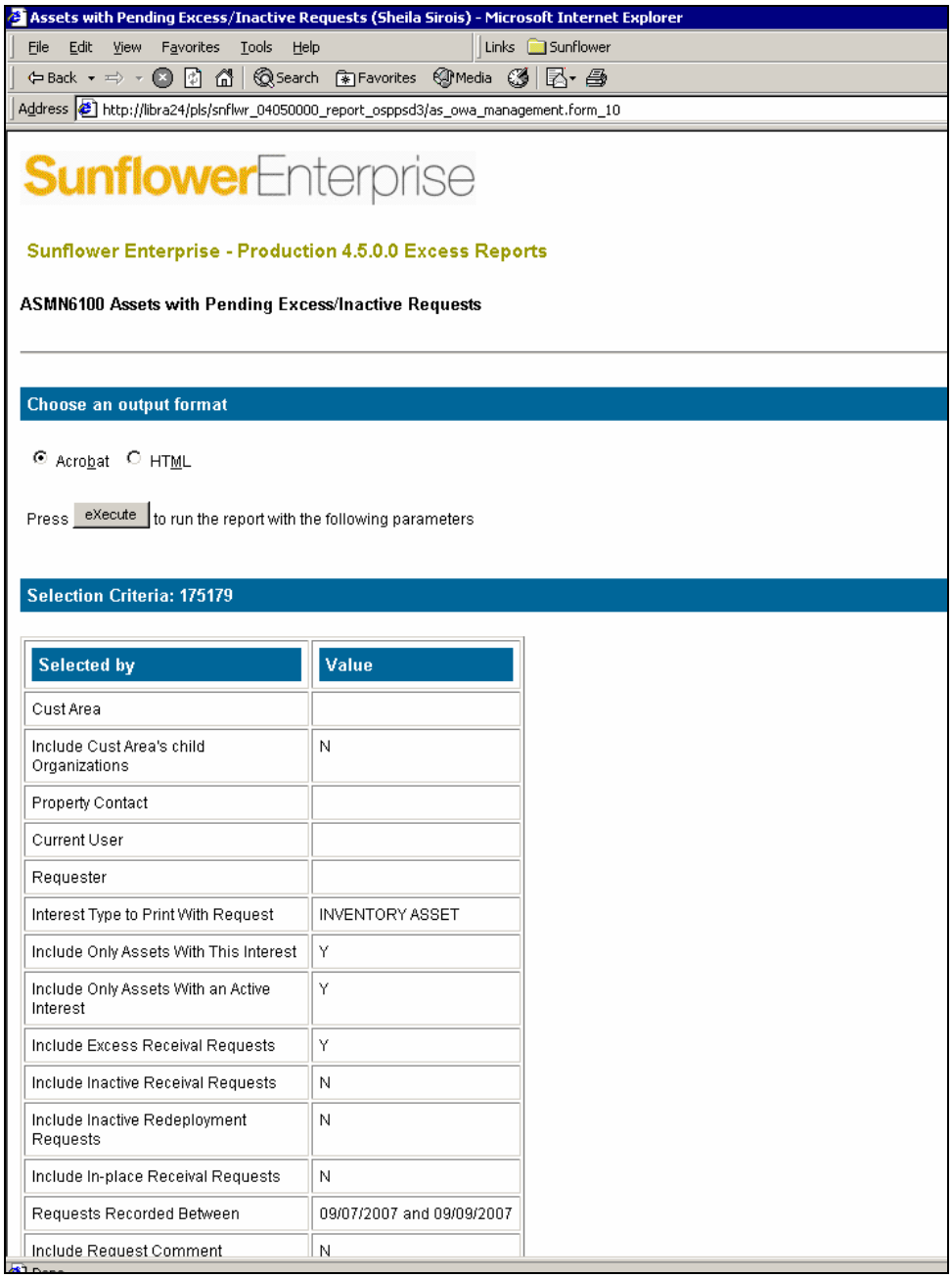

5. Select the **Acrobat** radio button.

6. Review your parameters and select the **eXecute** button.

Result: A report is opened in a separate window.

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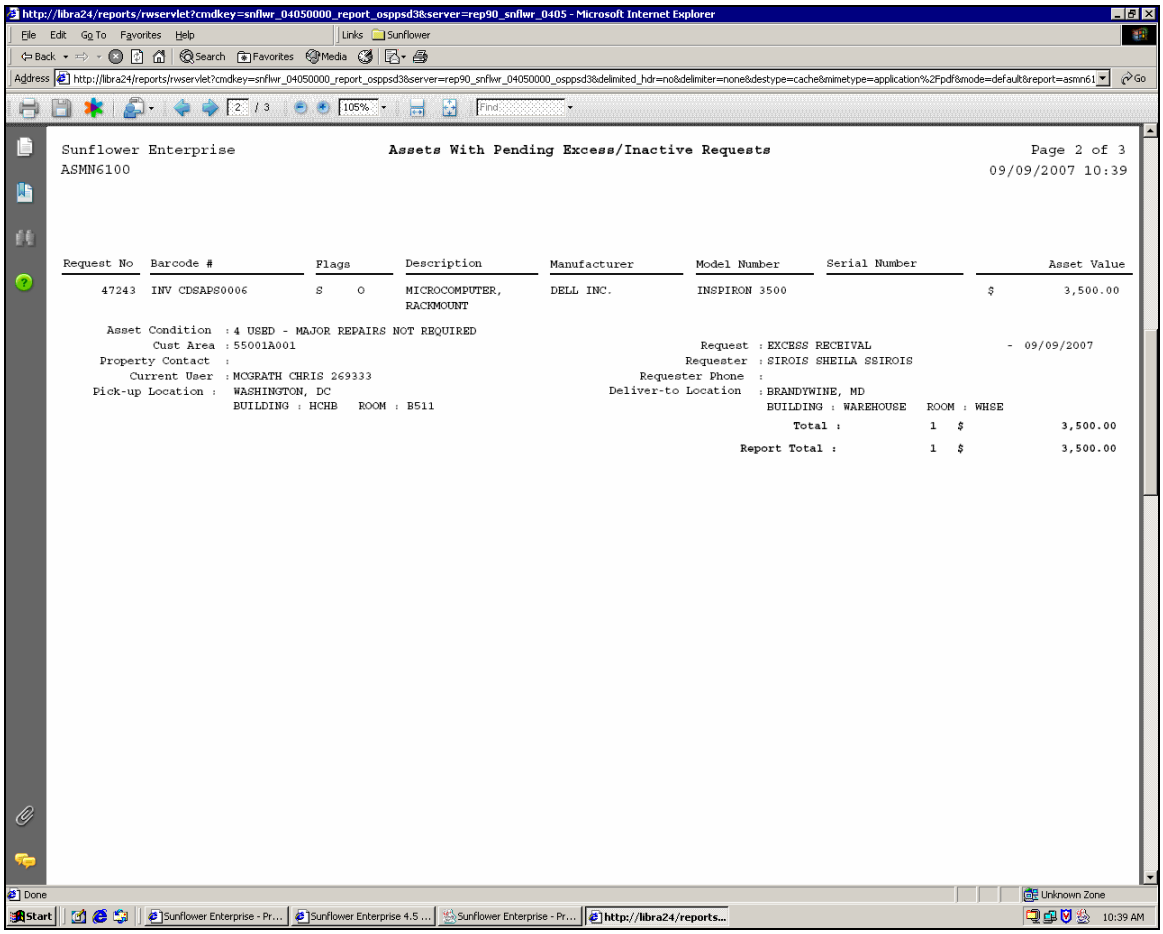

Sunflower Enterprise — Assets With Pending Excess/Inactive Requests — Page 2 of 3
ASMN6100 — 09/09/2007 10:39

Request No	Barcode #	Flags	Description	Manufacturer	Model Number	Serial Number	Asset Value
47243	INV CDSAPS0006	S O	MICROCOMPUTER, RACKMOUNT	DELL INC.	INSPIRON 3500		$ 3,500.00

Asset Condition : 4 USED - MAJOR REPAIRS NOT REQUIRED
Cust Area : 55001A001
Property Contact :
Current User : MCGRATH CHRIS 269333
Pick-up Location : WASHINGTON, DC
BUILDING : HCHB ROOM : B511

Request : EXCESS RECEIVAL - 09/09/2007
Requester : SIROIS SHEILA SSIROIS
Requester Phone :
Deliver-to Location : BRANDYWINE, MD
BUILDING : WAREHOUSE ROOM : WHSE

Total : 1 $ 3,500.00
Report Total : 1 $ 3,500.00

End of activity.

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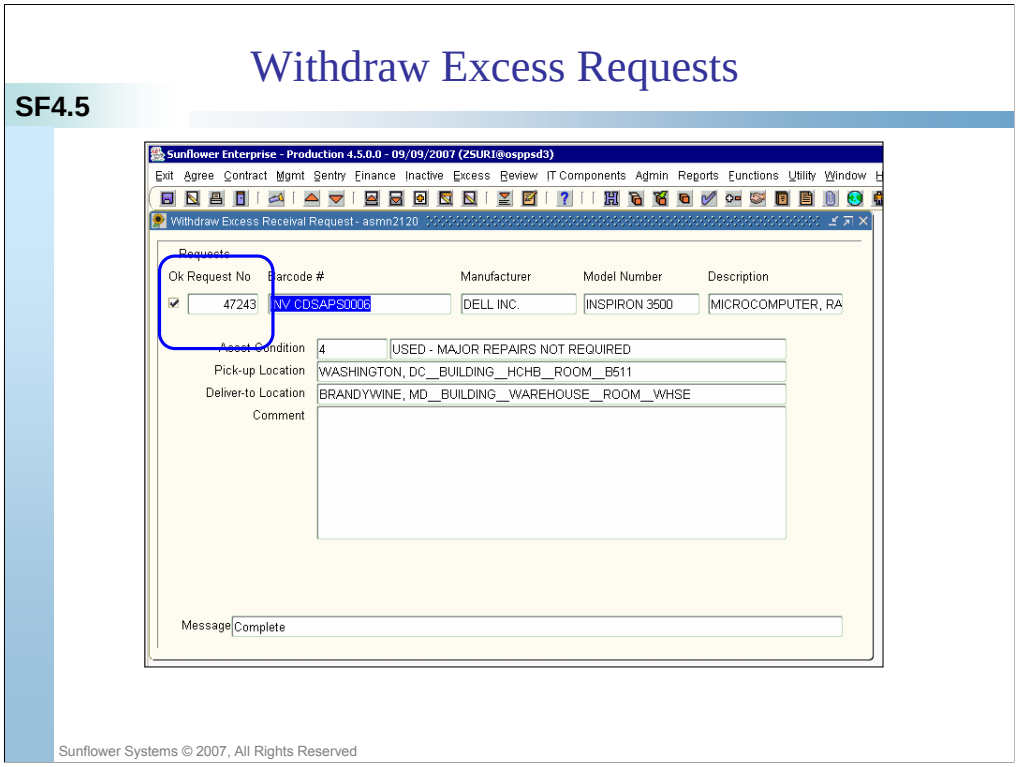


Use the **Withdraw Excess Receival Request** screen to withdraw an excess pick up request.

STEP 1: Enter the **Request Number** and select **Tab.**

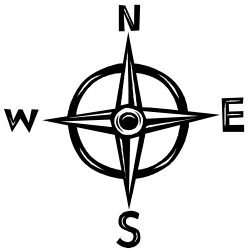
Result: The **Barcode Number, Manufacturer, Model,** and **Official Name** will autofill.

STEP 2: **Save** the record.

Result: The excess pick up request is withdrawn.

NAV: Withdraw Excess Receival Request

SF4.5



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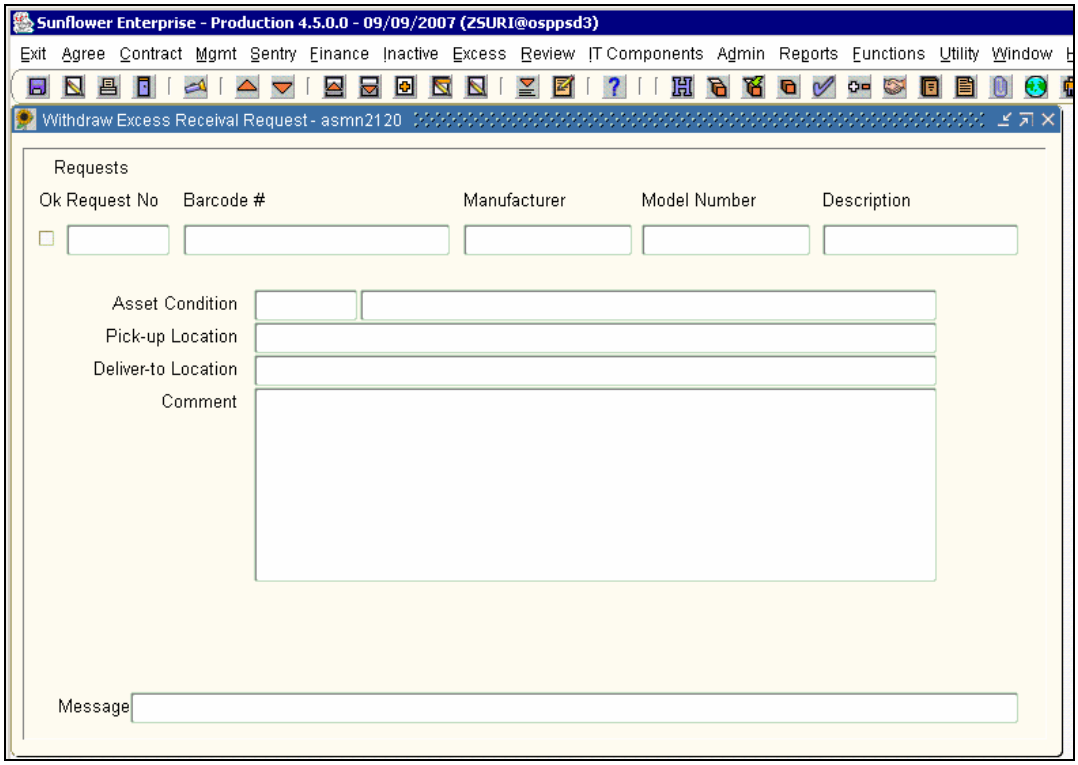
Withdraw Excess Receival Request

Inventory Clerk
M > Excess > Withdraw Excess Receival Request
Withdraw Excess Receival Request



1. Enter a value for the **Request No** (i.e. Request Number) field and **Tab.**

   Result: The barcode number and catalog information is displayed.

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

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

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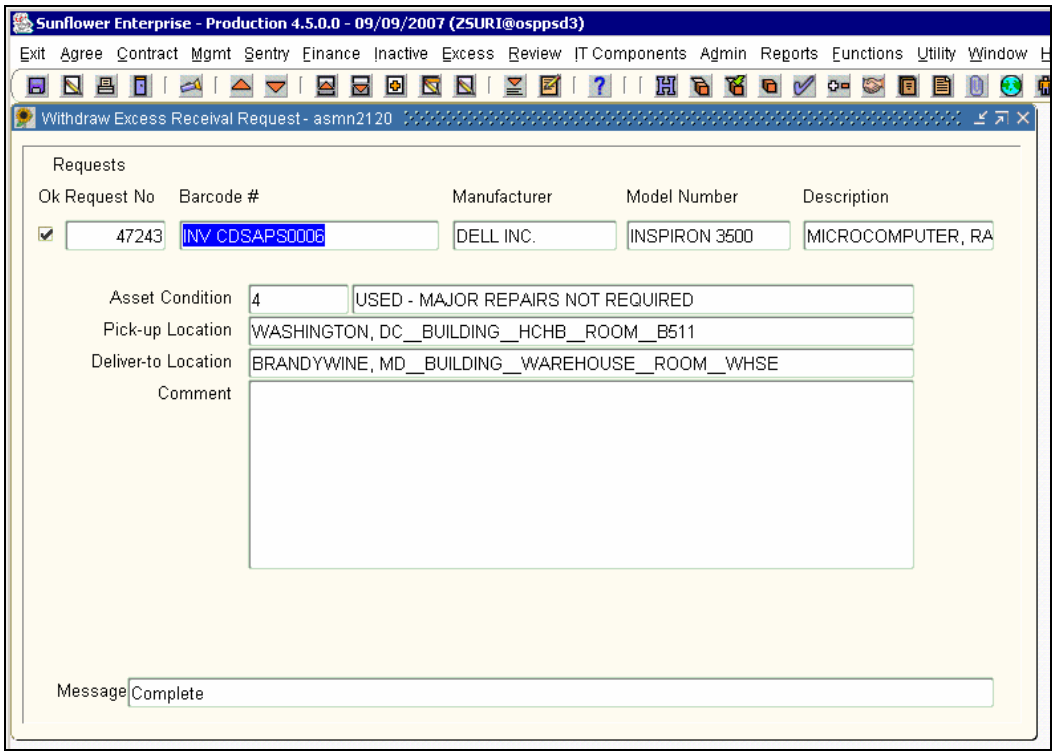

Note: View the **Assets with Pending Excess/Inactive Requests** report to verify that the withdrawal request was completed.

End of activity.

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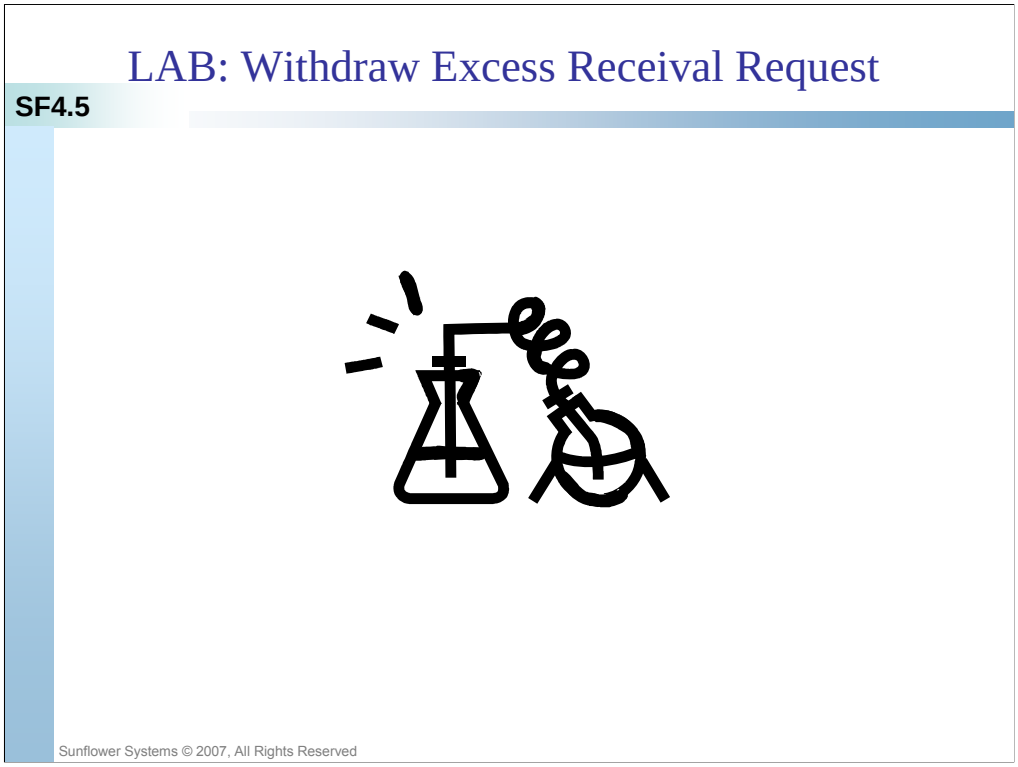

Withdraw the excess request the laptop Barcode # barcode # CD02MMDDYYXX (where MM=Month, DD=Day, YY=Year and XX=Student Number). You will need the **Request Number** previously generated.

SF4.5

Review Excess Assets Available for Use

Sunflower Enterprise
ASMN6120

Asset Search

Page 2 of 333
09/13/2007 20:46

Barcode #	Flags	Description	Manufacturer	Model Number	Serial Number	Asset Value	Acq Date
EXC CD0001338427	S ◇	MICRO COMPUTER	DELL INC.	GX110/600MHZ	JXFD10B	$ 1,473.00	05/19/2001
	Cust Area : S4001N371 Property C : PICKERIGN DEBRA 4662 Phone : 3013722923 Current Us : Phone :			Location : BRANDYWINE, MD BUILDING : WAREHOUSE ROOM : FLOOR			
EXC CD0000619690	S ◇	MICROCOMPUTER, DESKTOP, TOWER, MINI-TOWER	DELL INC.	586 90MHZ -47060-	5847Q	$ 2,494.48	08/21/1995
	Cust Area : S4001N371 Property C : PICKERIGN DEBRA 4662 Phone : 3013722923 Current Us : Phone :			Location : BRANDYWINE, MD BUILDING : WAREHOUSE ROOM : EXCESS			
EXC CD0000620231	S ◇	LAPTOP COMPUTER -155021-	DELL INC.	XPI -155021-	8SQZK7204	$ 3,877.00	10/20/1997
	Cust Area : S4001N371 Property C : PICKERIGN DEBRA 4662 Phone : 3013722923 Current Us : Phone :			Location : BRANDYWINE, MD BUILDING : WAREHOUSE :			
EXC CD0000624219	S ◇	LAPTOP COMPUTER -156248-	DELL INC.	CPI 266MHZ -156248-	2CKTS	$ 2,704.00	10/07/1998
	Cust Area : S4015M106 Property C : RICHIE DEBRA L 270928 Phone : 7074435610 Current Us : Phone :			Location : EUREKA, CA : :			
EXC CD0000624269	S ◇	LAPTOP COMPUTER -156148-	DELL INC.	3000 -156148-	4LS2F01	$ 1,258.00	04/25/2001
	Cust Area : S4015M106 Property C : RICHIE DEBRA L 270928 Phone : 7074435610 Current Us : Phone :			Location : EUREKA, CA : :			

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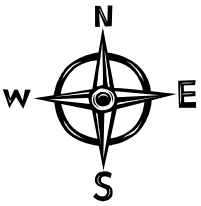
The Asset Search Report in the Excess Menu allows users to search for available excess assets. These assets may then be requested for redeployment within your custodial area. When an asset is requested, the NOAA Warehouse Property Custodian, Debra Pickering, retires the excess asset with a final event of Redeploy. This sets the asset back as an Inventory Asset. Debra Pickering will then transfer the asset to the PC requesting the excess asset.

SF4.5

NAV: Excess Asset Search Report



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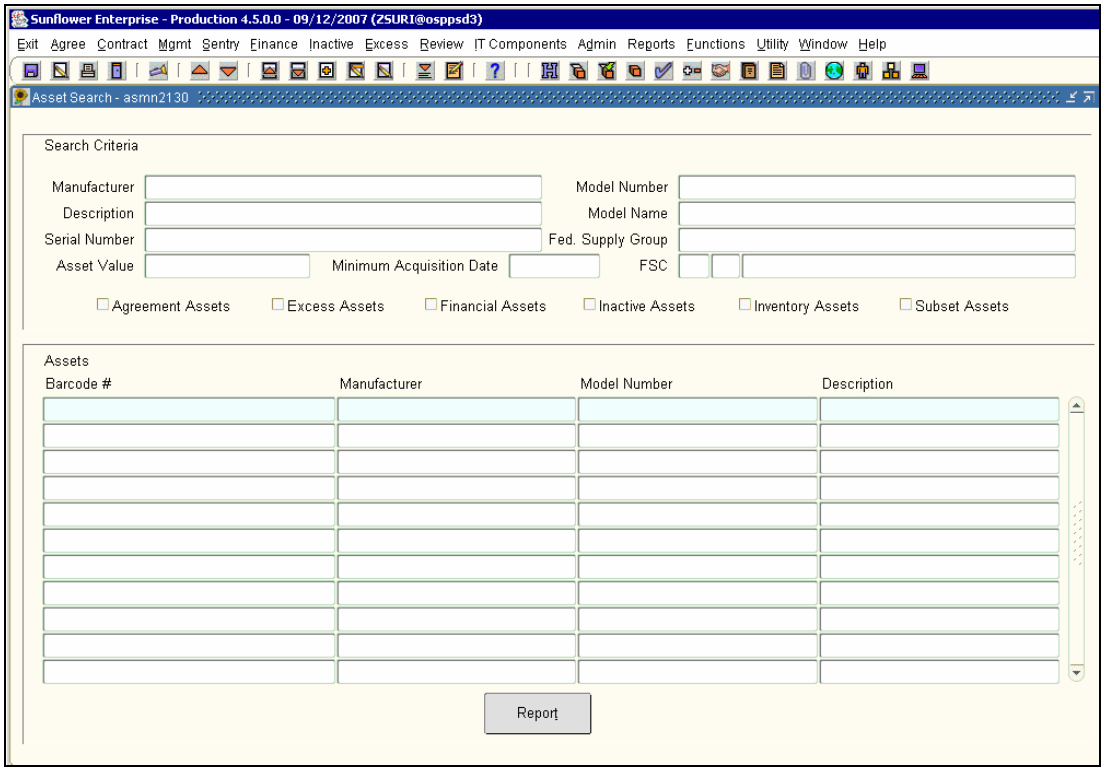
Excess Asset Search Report

Inventory Clerk
M > Excess > Asset Search
Asset Search



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

Note: When searching for specific assets, search on **Manufacturer** and **Model Number**.

2. Select the **Excess Assets** checkbox to search all excess assets available for redeployment.

3. Select the **Report** button at the bottom to view the assets in a report format with property record details, including asset value.

Result: The Asset Search report fields displays.

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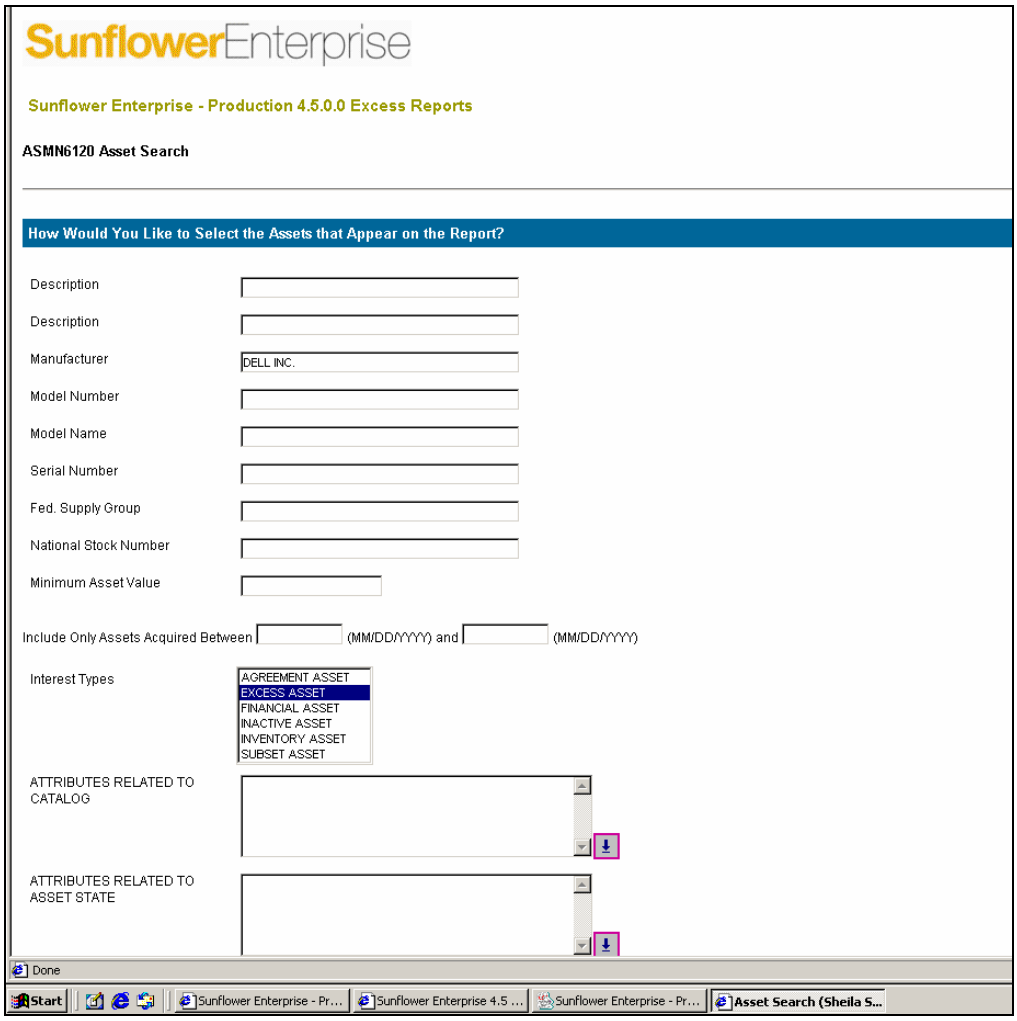

4. Select the **Submit** button to run the report.

<u>Result:</u> The review query screen displays.

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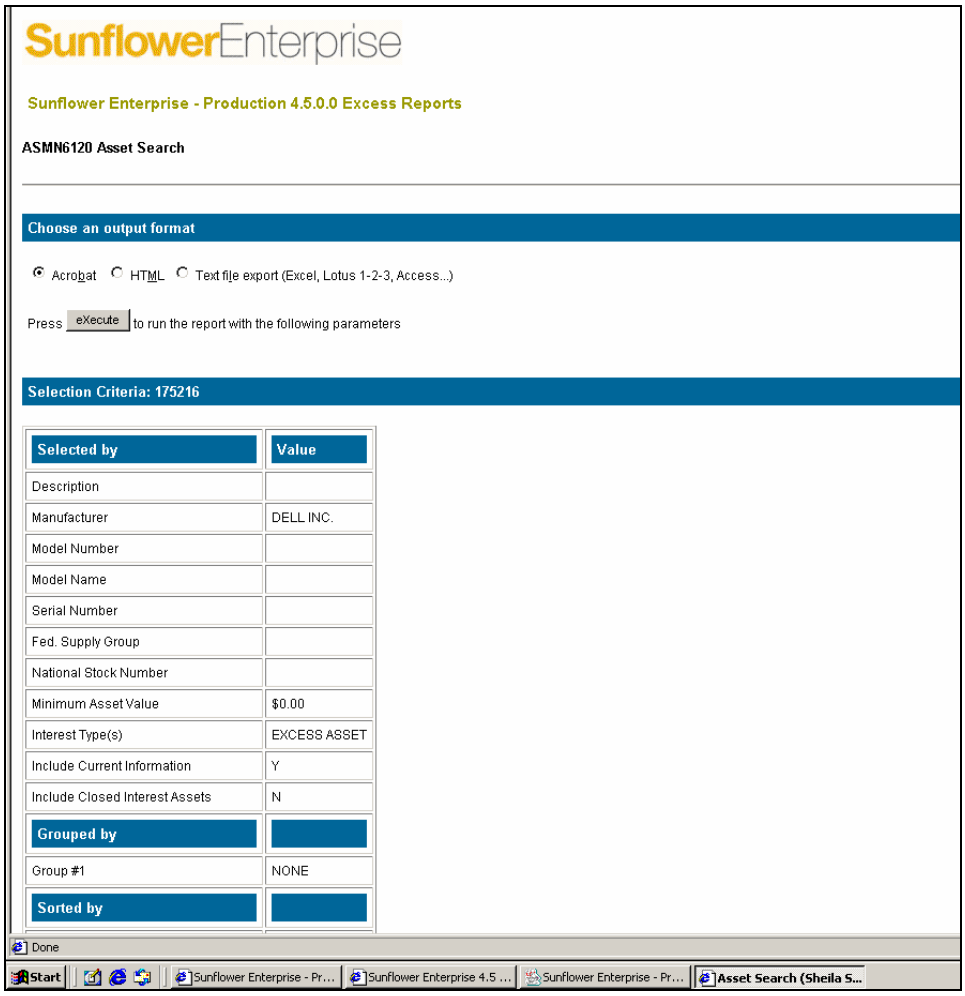

5. Select the **Acrobat** radio button.

6. Select the **eXecute** button to run the report.

Result: The Asset Search Report displays. The report provides the Barcode Number with EXC in front indicating it is an excessed asset. The property description, manufacturer, model number, serial number, asset value and acquisition date are also included on the report.

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Sunflower Enterprise **Asset Search** Page 2 of 333
ASMN6120 09/13/2007 20:46

Barcode #	Flags	Description	Manufacturer	Model Number	Serial Number	Asset Value	Acq Date
EXC CD0001338427	S O	MICRO COMPUTER	DELL INC.	GX110/600MHZ	JXFD10B	$ 1,473.00	05/19/2001
	Cust Area : 54001N371 Property C : PICKERIGN DEBRA 4662 Phone : 3013722923 Current Us : Phone :			Location : BRANDYWINE, MD BUILDING : WAREHOUSE ROOM : FLOOR			
EXC CD0000619690	S O	MICROCOMPUTER, DESKTOP, TOWER, MINI-TOWER	DELL INC.	586 90MHZ ~47060~	5847Q	$ 2,494.48	08/21/1995
	Cust Area : 54001N371 Property C : PICKERIGN DEBRA 4662 Phone : 3013722923 Current Us : Phone :			Location : BRANDYWINE, MD BUILDING : WAREHOUSE ROOM : EXCESS			
EXC CD0000620231	S O	LAPTOP COMPUTER ~155021~	DELL INC.	XPI ~155021~	8SQZK7204	$ 3,877.00	10/28/1997
	Cust Area : 54001N371 Property C : PICKERIGN DEBRA 4662 Phone : 3013722923 Current Us : Phone :			Location : BRANDYWINE, MD BUILDING : WAREHOUSE :			
EXC CD0000624219	S O	LAPTOP COMPUTER ~156248~	DELL INC.	CPI 266MHZ ~156248~	ZCKTS	$ 2,704.00	10/07/1998
	Cust Area : 54015M106 Property C : RICHIE DEBRA L 270928 Phone : 7074435610 Current Us : Phone :			Location : EUREKA, CA : :			
EXC CD0000624269	S O	LAPTOP COMPUTER ~156148~	DELL INC.	3800 ~156148~	4LB2F01	$ 1,258.00	04/25/2001
	Cust Area : 54015M106 Property C : RICHIE DEBRA L 270928 Phone : 7074435610 Current Us : Phone :			Location : EUREKA, CA : :			

7. Review the Report for excess assets available for redeployment within your Custodial Area.

End of activity.

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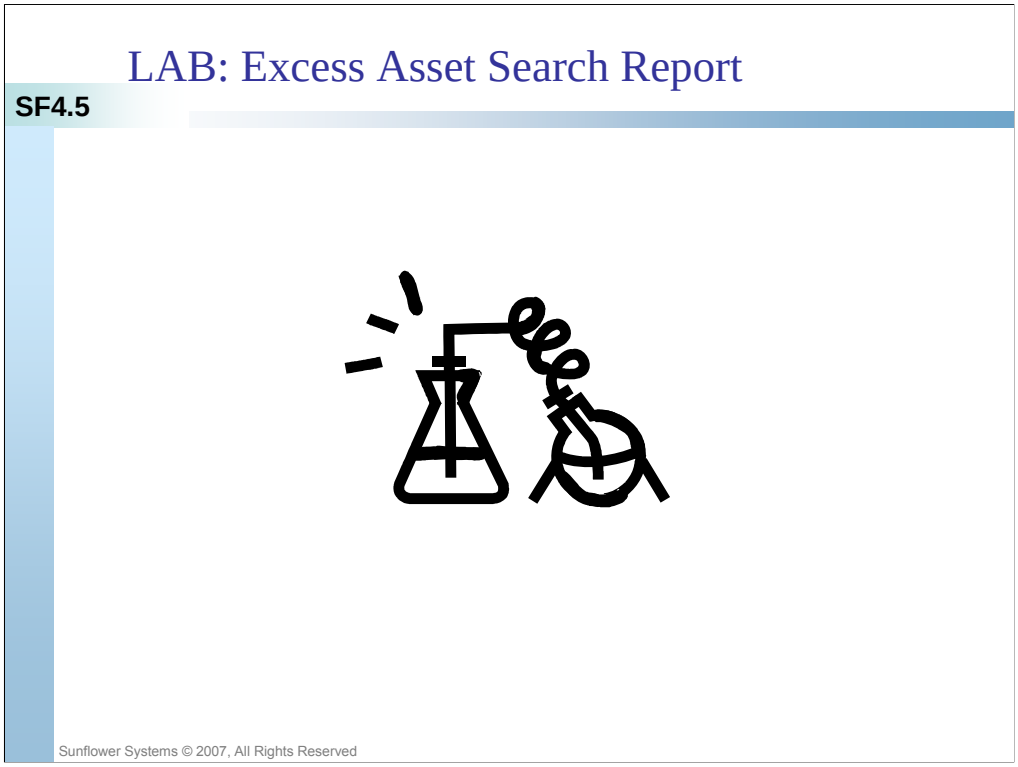
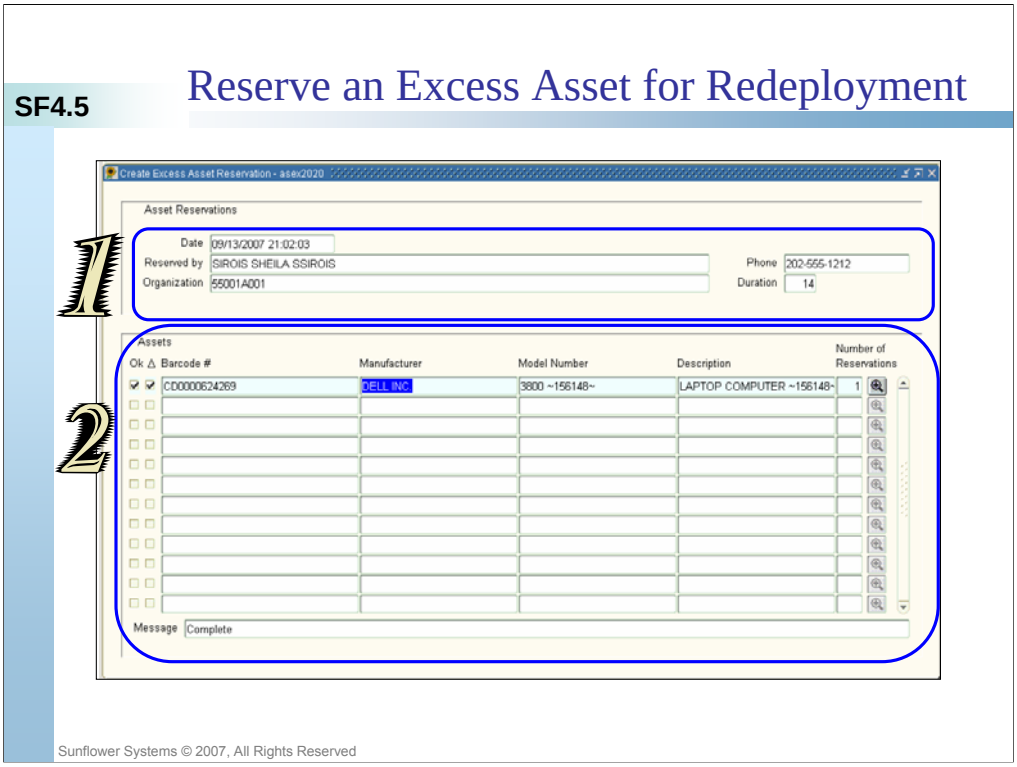


Run the report to search for assets available.

Make note of one of the Barcode Numbers of excess assets available. You will need this for a later Lab.

Barcode #:_____



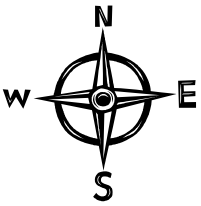
The **Create Excess Asset Reservation** screen is used to request an excess asset for redeployment.

Area 1 The PC includes his/her contact information and the length of time in days he/she is willing to wait for an asset in the **Duration** field.

Area 2 The barcode numbers of the excess assets being requested are listed. More than one asset may be requested at once by using the next available row and entering the additional barcode numbers.

SF4.5

NAV: Reserve an Excess Asset for Redeployment



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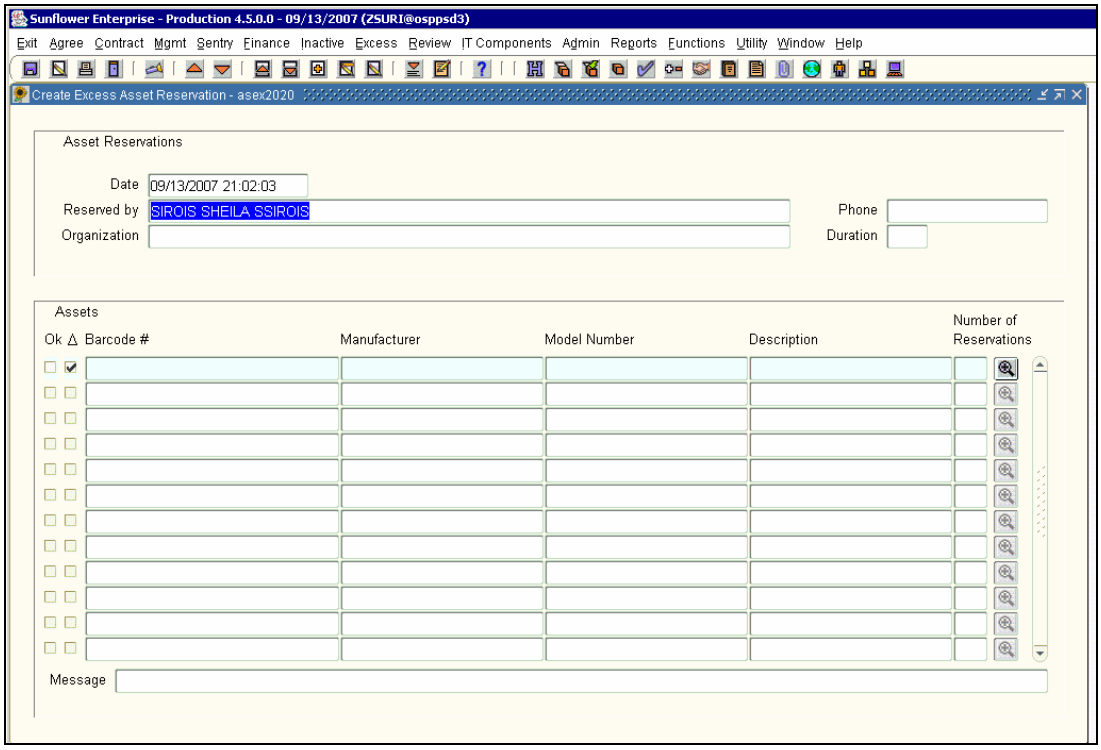
Reserve Excess Asset for Redeployment

Inventory Clerk
M > Excess > Create Excess Asset Reservation
Create Excess Asset Reservation



1. The **Reserved by** field defaults as the user currently signed into the application. Change as necessary.

2. Enter the phone number of the PC reserving the asset in the **Phone** field and **Tab**.

3. Select the PC's custodial area in the **Organization** field and **Tab**.

4. Enter the number of days that the PC is willing to wait for the asset in the **Duration** field.

5. In the Assets section, enter the barcode numbers of the asset being reserved in the **Barcode #** field and **Tab**.

Note: The remaining property details populate.

6. Enter any additional assets to reserve on the next available blank row.

7. Select the **Save** icon on the toolbar to save the Excess Asset Reservation.

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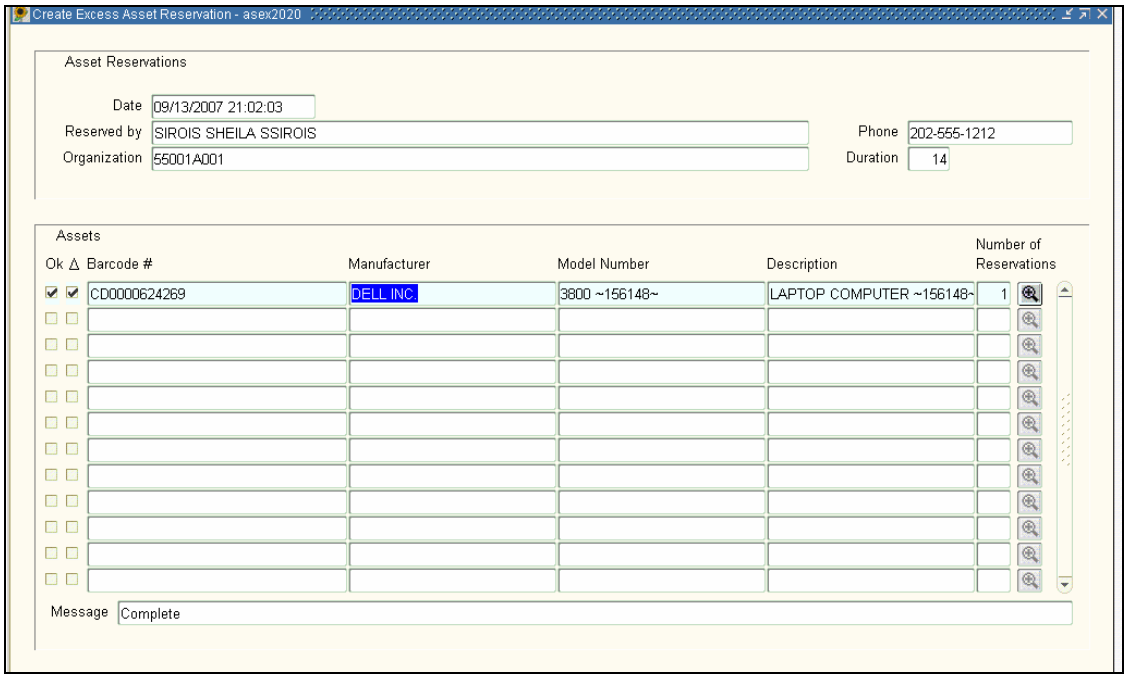
Result: The Excess Asset Reservation is complete.



End of Activity.

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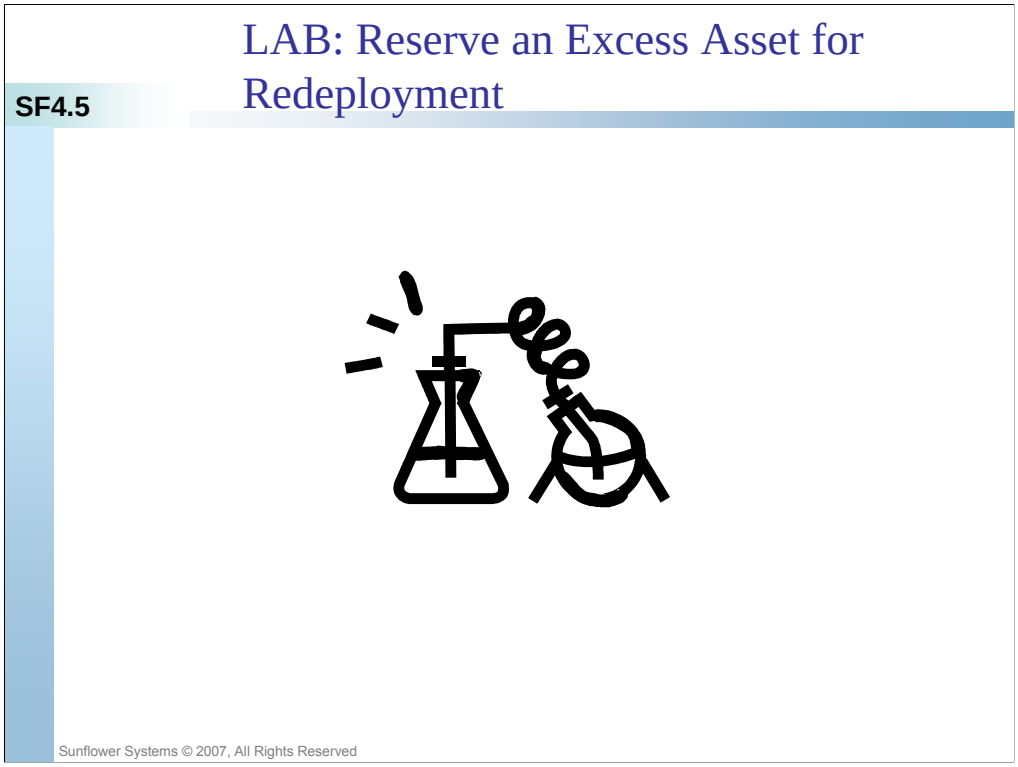
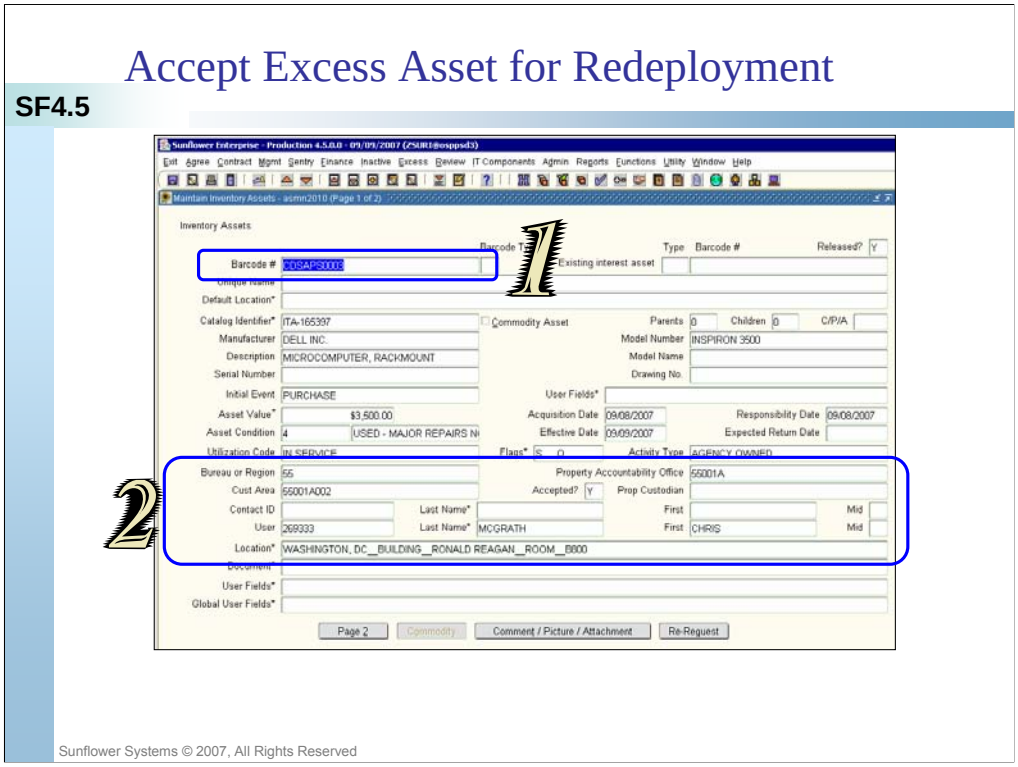


Make a request to reserve one of the assets from the Asset Search report.



The only time a PC will accept a transfer coming from outside his/her Bureau is when he/she has requested an excess asset be redeployed for use in their Custodial Area. The NOAA Warehouse will reinstate the asset (changes the excess asset back to an inventory asset) and use the Transfer Request process to transfer responsibility to the requesting PC. (See Chapter 6 for the Transfer Request process the NOAA Warehouse will use.)

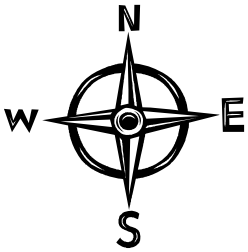
When this happens, the PC may prefer to use the **Maintain Inventory Asset** screen because along with the custodial area changing, the PC will also have to change the bureau/region and the Property Accountability Office. All of this can be changed in the Maintain Inventory Assets screen, while using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

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

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

NAV: Accept Excess Asset for Redeployment

SF4.5



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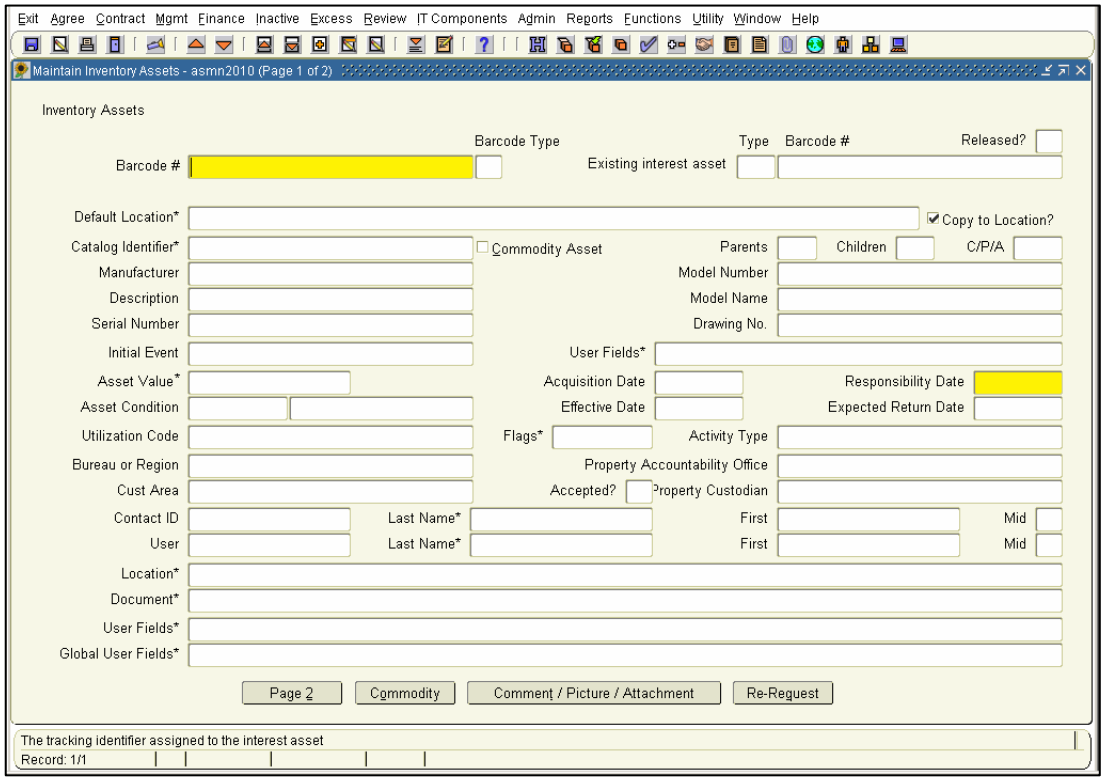
Accept Excess Asset for Redeployment

Inventory Clerk
M > Mgmt > Maintain Inventory Assets
Maintain Inventory Assets



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

<u>Result:</u> The remainder of the property record auto-populates.

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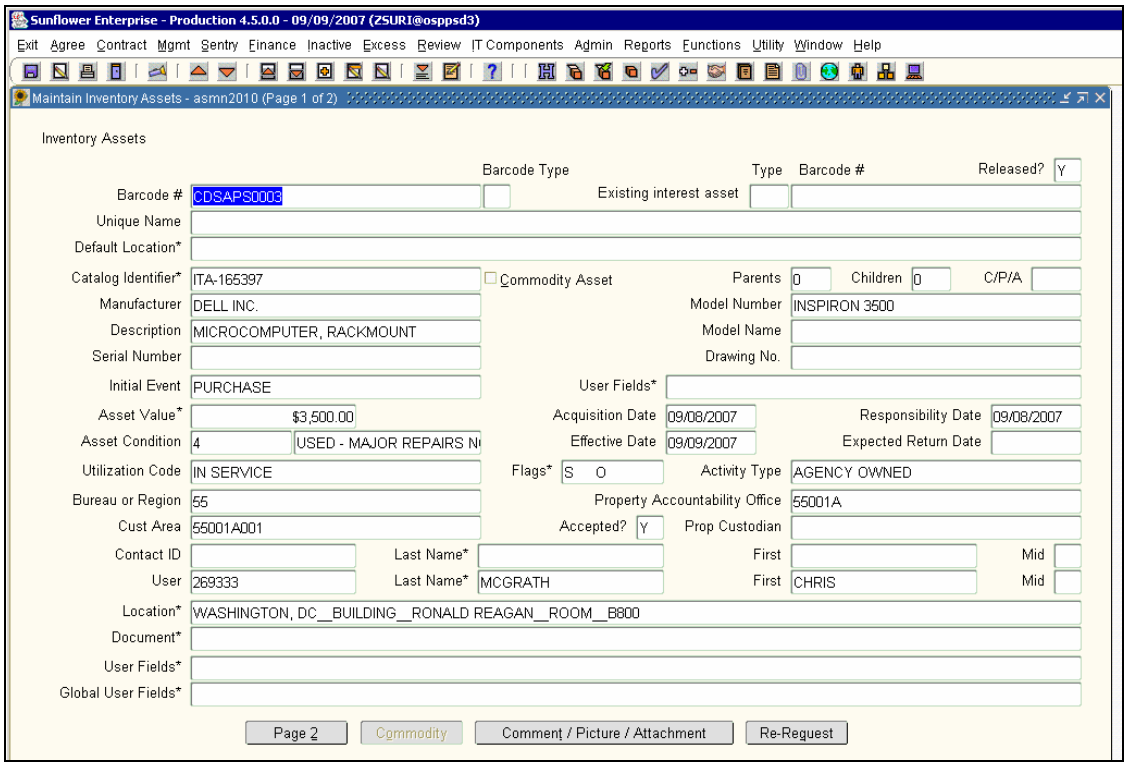

2. Enter the accepting Bureau or Region in the **Bureau or Region** field to reflect the new Bureau or Region.

3. Change the Property Accountability Office in the **Property Accountability Office** field to reflect the new Property Accountability Office.

4. Change the Custodial Area in the **Cust Area** field to reflect the new Custodial Area.

5. Change the **Contact ID**, if necessary.

6. Change the **User Last Name** field to reflect new user, if necessary.

7. Double click the **Location** field to reflect the new location of the asset.

8. Update the **Site, Building** and **Room** fields.

9. Select the **Save** button from the toolbar to save the new location.

10. Select the **Save** button from the toolbar to save the accepted asset.

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

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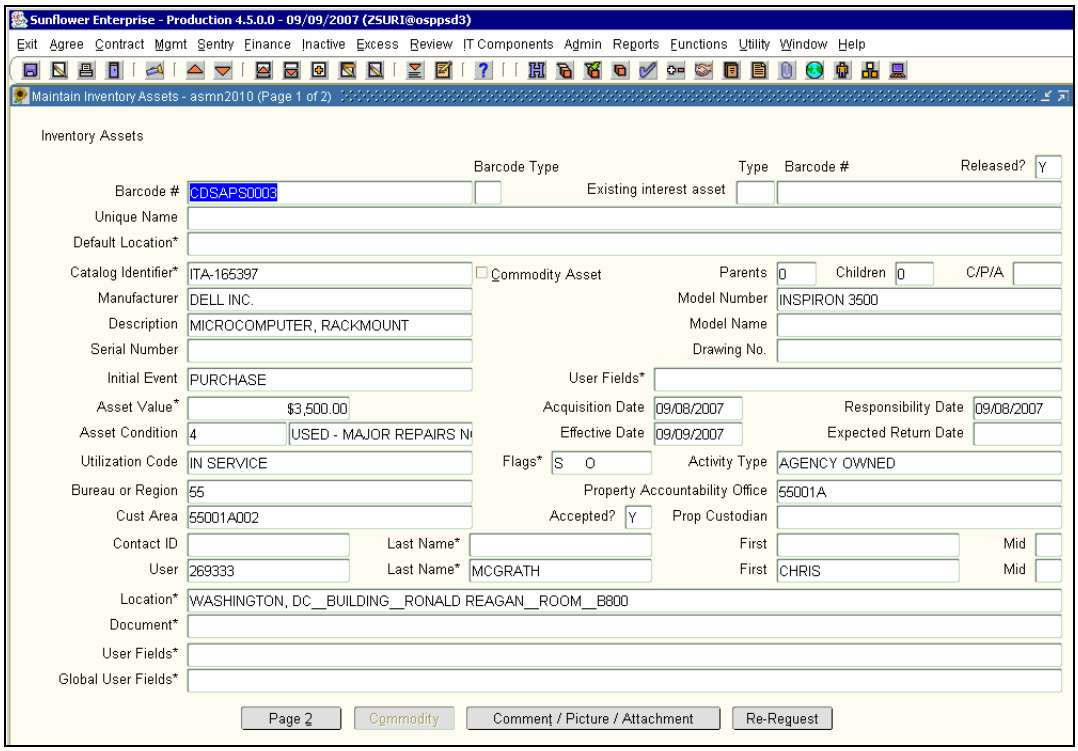

End of activity.

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Lesson Summary

SF4.5

You should now be able to:

- Recognize the major differences between the ITA Headquarters, ITA Domestic, ITA International, and the NTIS offices when excessing assets
- Summarize the steps used to create an excess request
- Generate excess requests for property
- Generate Excess/Inactive Receival Form (Report)
- Generate Assets with Pending Excess/Inactive Requests Report
- Withdraw excess requests
- Review excess assets available for redeployment
- Reserve excess asset for redeployment
- Accept excess asset for redeployment

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SF4.5

Notes:

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SF4.5

Chapter 10:
Retire Assets (Lost, Damaged and Destroyed)

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Lesson Objectives

SF4.5

After this lesson you should be able to:

- Summarize the steps used to retire assets
- Complete the CD 50 / 52 Retirement Request Form
- Establish an approver path for retiring assets
- Approve and Retire assets

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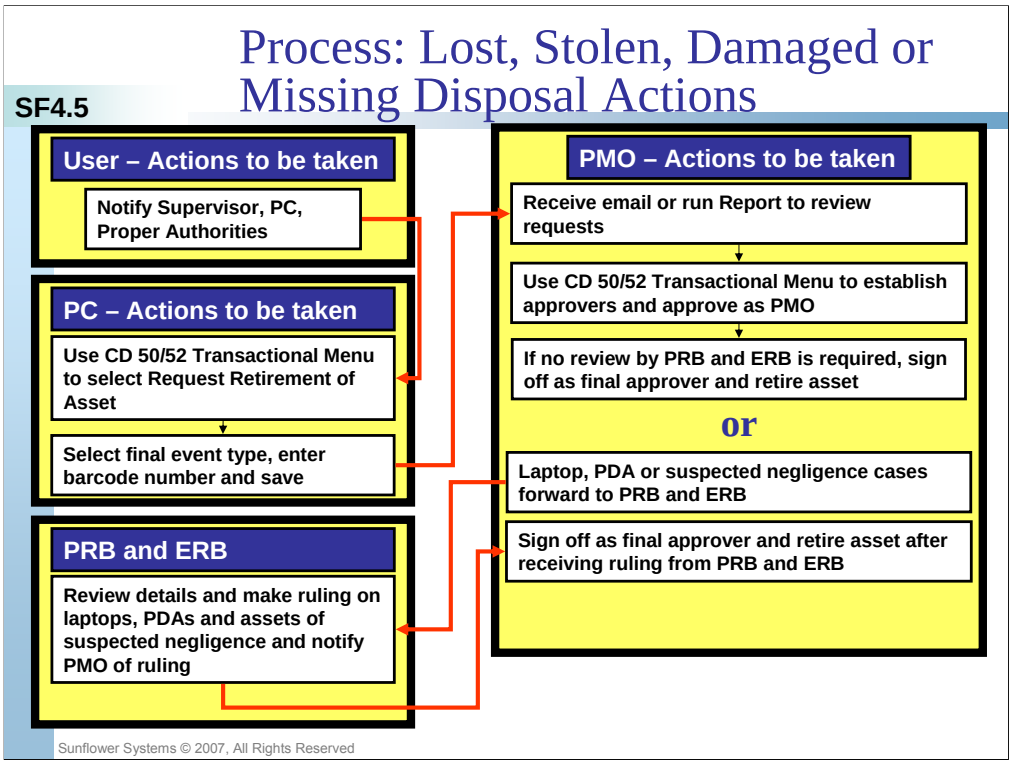
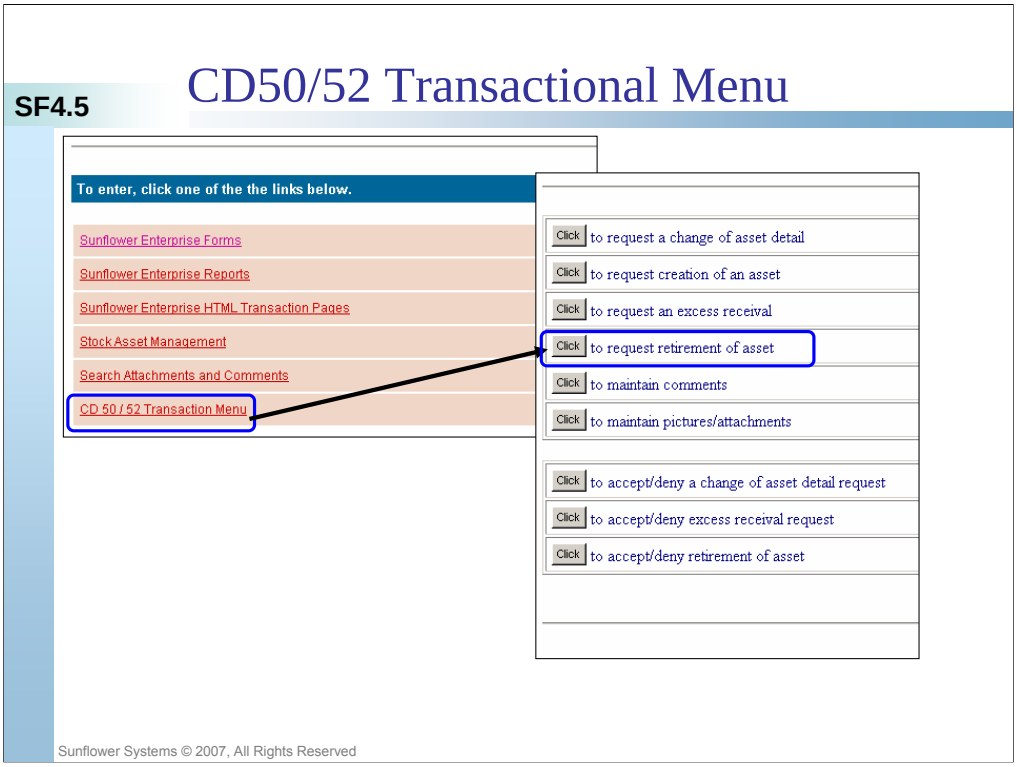
Lost, Damaged and Destroyed (LD&D) is a process used to review and retire assets from Sunflower that are no longer in use. Lost or stolen assets fall under this category, as well as damaged, destroyed, and abandoned assets. Make sure to follow DOC policy for what supporting documentation is needed for each scenario (e.g. if an asset is stolen, a police report is required). See your DOC Property Manual or PAO for the DOC guidelines.

In the case that a user identifies a lost or stolen asset, s/he must immediately notify their supervisor, their PC and the proper authority. The proper authority depends on where the loss or theft took place. If it was in HCHB, the user would notify building security. If it was stolen from a car, the local authorities in that jurisdiction would be notified and the proper report would be filed. If the asset is a laptop or a PDA, ITA requires the user to also immediately notify OCIO and their PMO to attempt a remote data deletion. Another scenario where the LD&D process is used is if a PC discovers that assets are missing from his/her custodial area during an inventory. In both cases, the PC, once aware of the loss, must collect the details of the situation.

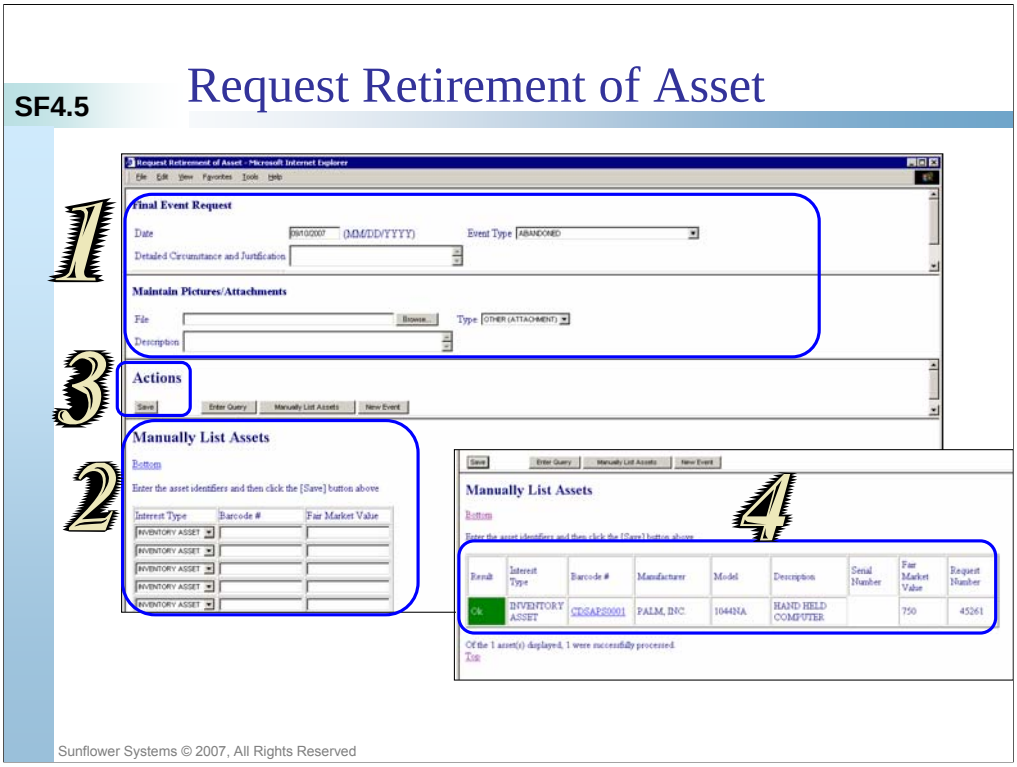
The PC will make the request, with the PMO being the final sign-off, which creates a retired asset.



If an asset is either a laptop, PDA or if negligence is suspected, the information is forwarded to the Property Review Board (PRB) and the Executive Review Board (ERB) for review and investigation.



Select the CD 50 / 52 Transaction Menu from the Sunflower screen. On the CD 50 / 52 Transaction Menu, the PC selects the Request Retirement of Asset. As a PC, this will be the only reason to use the Transactional Menu.



Area 1 In the **Final Event Request** section, PCs select the final event type. Enter supporting details in the **Detailed Circumstance and Justification** field as to why the asset is being retired. Any supporting documentation should be attached as well.

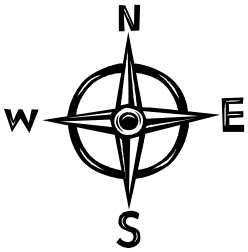
Area 2 The barcode number of the asset being retired is entered in the **Manually List Assets** section. More than one asset may be retired as long as the circumstances above pertain to all assets listed. The Interest Type defaults to **Inventory Asset** and should not be changed.

Area 3 Save the Retirement Request in the **Actions** section.

Area 4 Upon successfully saving the Retirement Request, the result **OK** will appear and a **Request Number** is created. This Request Number will be used by the PMO to pull up the request.

NAV: Request Retirement of Asset

SF4.5



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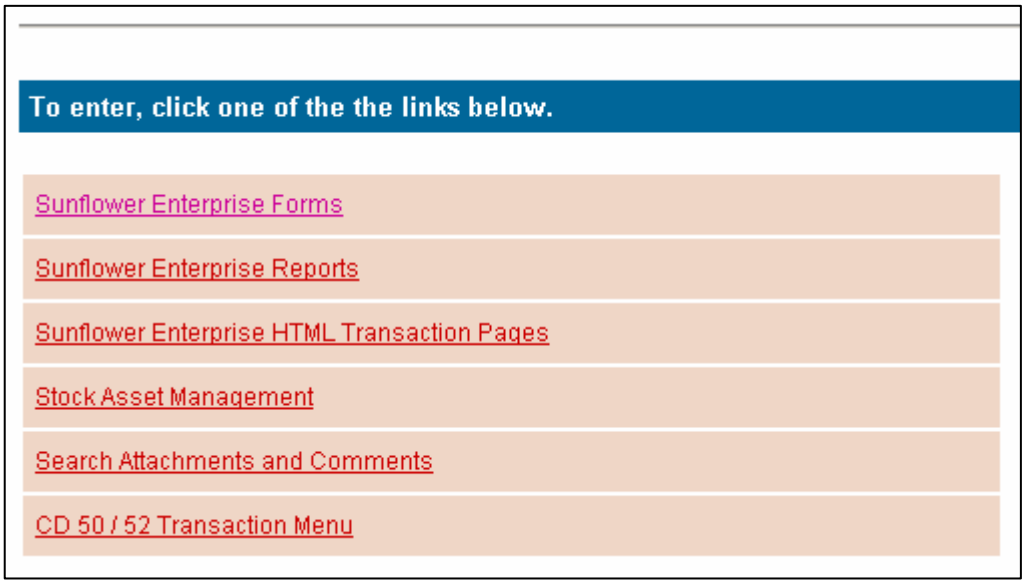
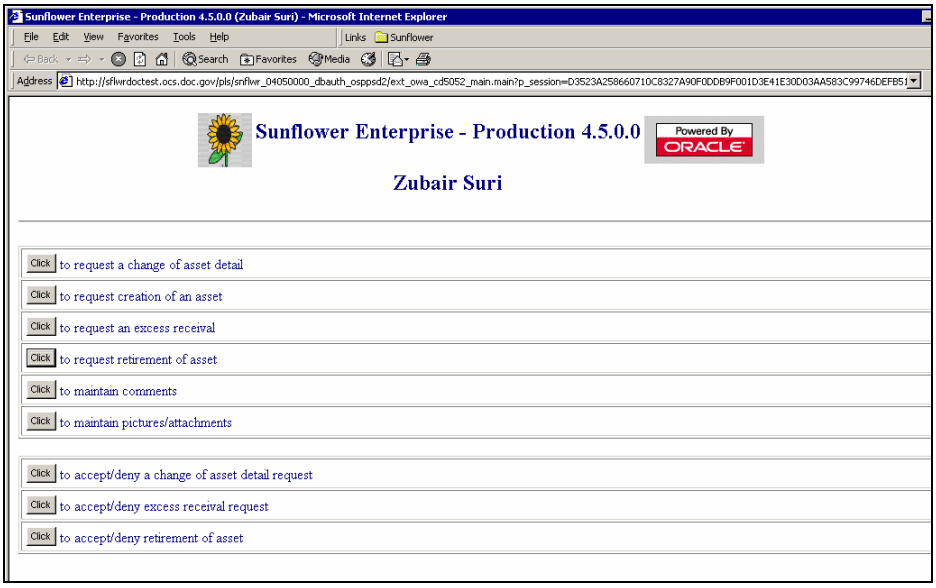
Request Retirement of Asset

Inventory Clerk, Inventory Manager
Sunflower Main Menu > CD 50 / 52 Transaction Menu
CD 50 / 52 Transaction Menu



1. Select the **CD 50 / 52 Transaction Menu**.

Result: The CD 50 / 52 Transaction Menu screen displays.



2. Select **click to request retirement of asset**.

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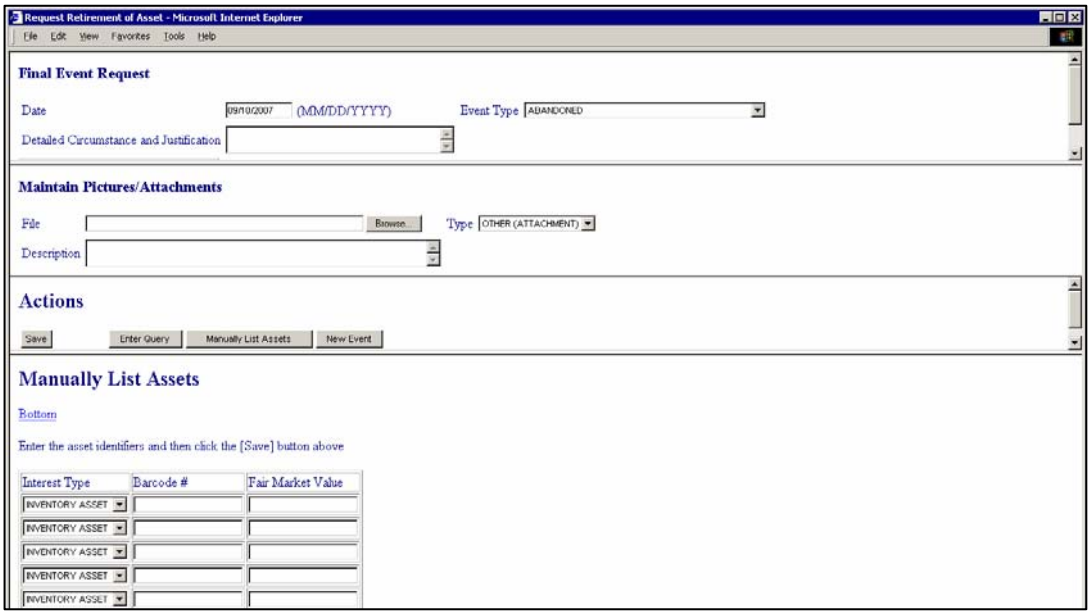
Result: The Final Event Request screen displays.



3. Select the **Final Event** from the **Event Type** field.

4. Complete the **Detailed Circumstance and Justification** field as they relate to the retirement request.

5. Attach any files related to the justification by clicking the **Browse** button.

6. Include a description of the attached file in the **Description** field.

7. Enter the barcode number of the asset being retired in the **Barcode #** field.

8. Enter a value of the asset in the **Fair Market Value** field.

Note 1: If more than one asset is being retired with the same information in the top half, enter additional barcode numbers in the next available blank field.

Note 2: To request retirement for a different event type, it is necessary to complete and save the request, the enter the screen again.

9. Select the **Save** button to save the retirement request.

Result: The screen shows the request was saved successfully with the OK message.

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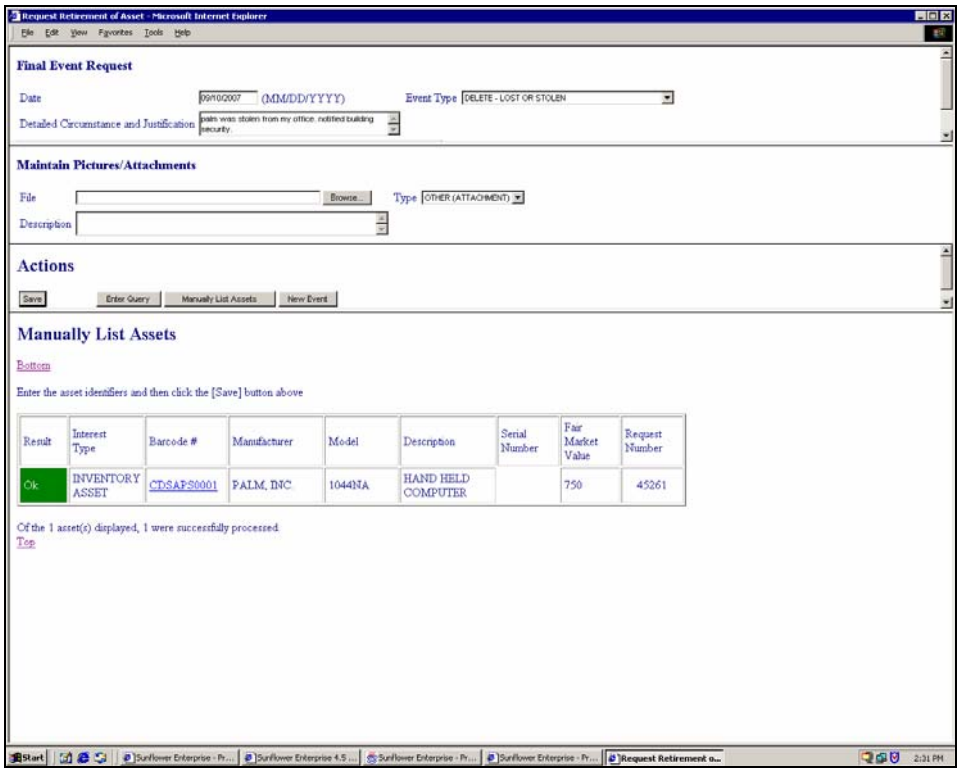

End of activity.

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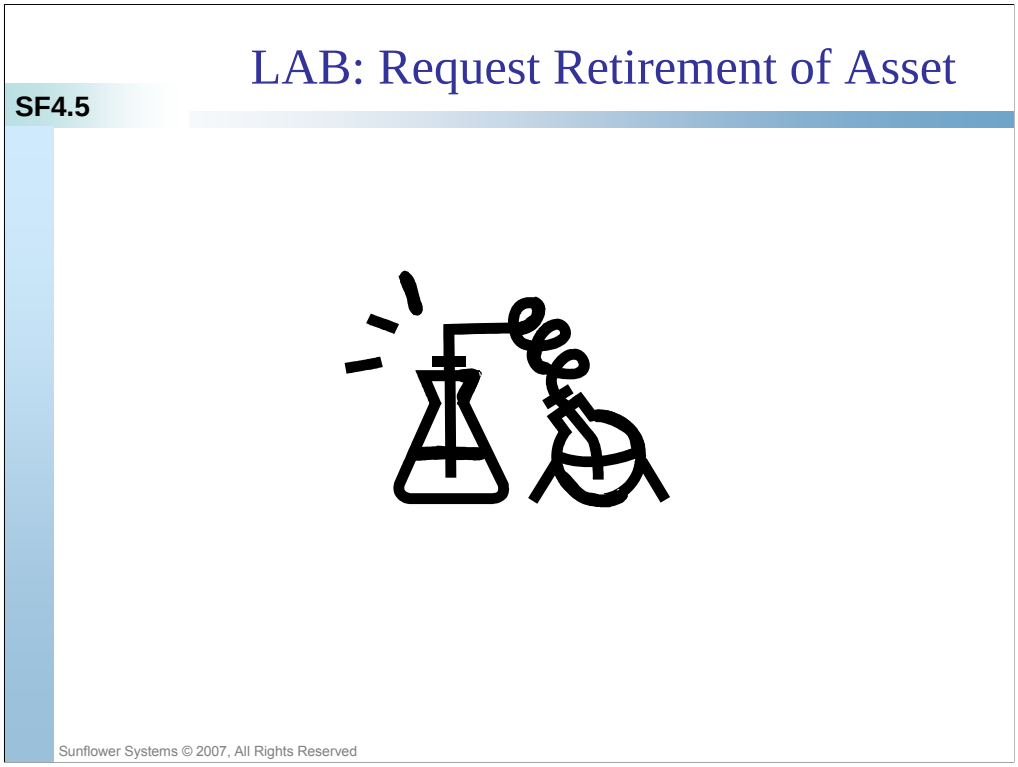

Request to retire the Dell Inspiron Laptop you created with barcode # CD01MMDDYYXX (where MM=Month, DD=Day, YY=Year and XX=Student Number).

Make note of the **Request Number:**_____

SF4.5

Assets with Final Event Request Report

Request #	Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value
47954	INV CD0000109095	S O	DISPLAY UNIT, CRT	AMES SCIENCE, INC.	3/50 ME-4 W/688	905BN6820	$ 4,935.00

Custodian : 54011M011
Property Contact : OTTO WILLIAM D 7858
User :
Fair Market Value :
Financial Ident.:

Request Date : 09/11/2007
Requester : OTTO WILLIAM D 7858
Requester Phone : 3034576232
Request Status : OPEN
Terminated By :
Final Event Type : DELETE - CORRECTION

Comment : The item is an old sun monitor under 5K, and does not need to be tracked.

Approver's Name	Action	Comment

Request #	Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value
47572	INV CD0000290121	O	DETECTOR, GAS	TRACE ANALYTICAL, INC.	RGD2	RGD1-051592-009	$ 10,400.00

Custodian : 54009M003
Property Contact : HARRIS DONNA R 12790
User :
Fair Market Value : $3,900.00
Financial Ident.:

Request Date : 09/12/2007
Requester : HARRIS DONNA R 12790
Requester Phone : 2085262329
Request Status : OPEN
Terminated By :
Final Event Type : TRANSFER - TO ANOTHER AGENCY BY AGENCY

Comment : Transfered to DOE/INEL Property Reutilization & Disposal Office 9/6/07

Approver's Name	Action	Comment

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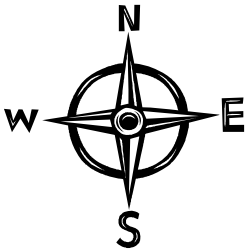
Email is sent to the PMO when a PC requests retirement of an asset. The PMO may also run a User Defined Report – **Assets with Final Event Requests -** to identify any retirement requests. The report displays the Request Number, Identifier (Barcode Number) and details of the asset. It will also display who made the request and when. Any comments the PC entered on the Request Retirement form also appear here.

SF4.5

NAV: Assets with Final Event Request Report



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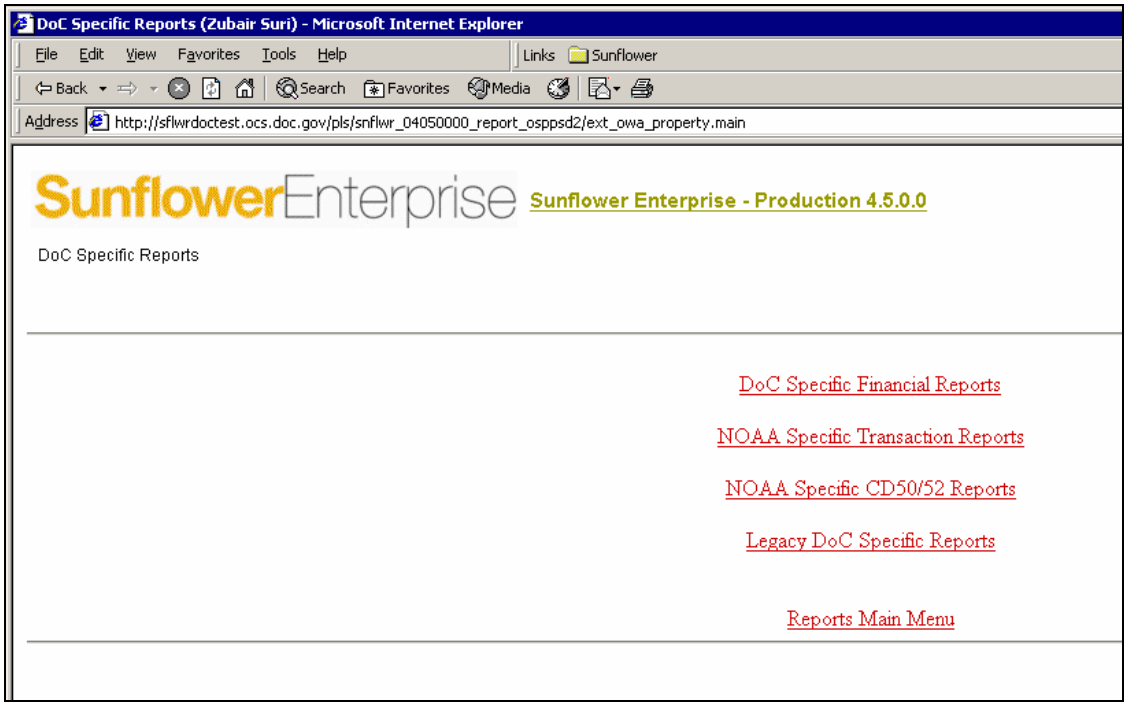
Assets with Final Event Requests Report

Inventory Clerk, Inventory Manager
M > Reports > User Defined Reports
User Defined Reports



1. Select the **NOAA Specific CD 50/52 Reports** link.

Result: The CD 50/52 Reports screen displays.

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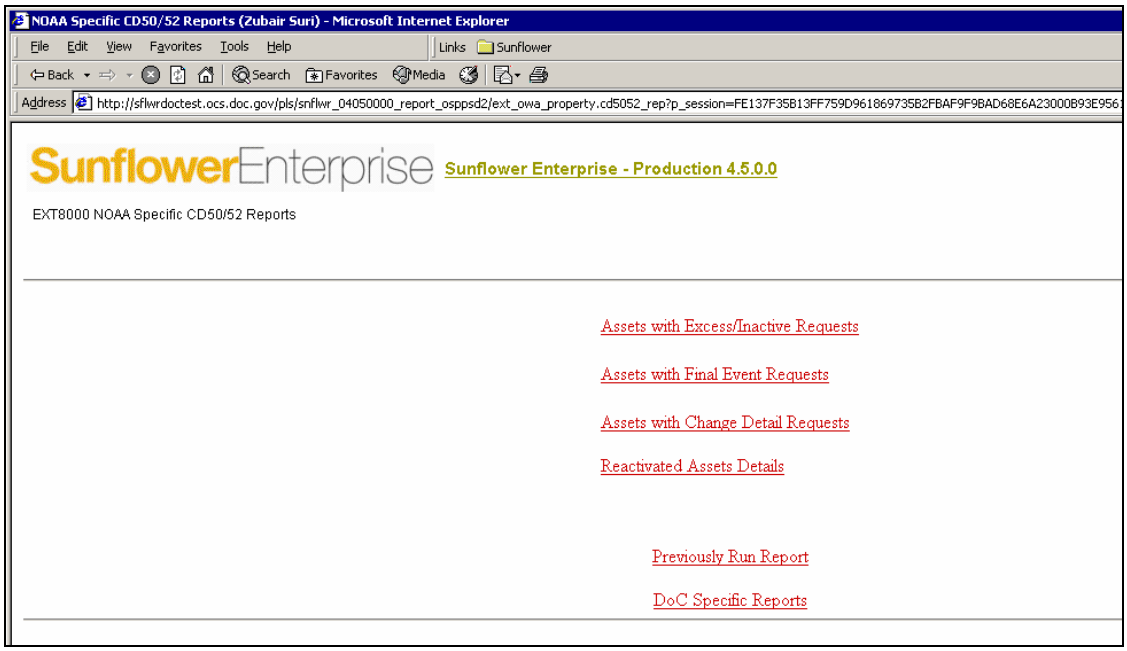

2. Select the **Assets with Final Event Requests** report link.

Note: The Assets with Final Event Requests report criteria selection screen displays.

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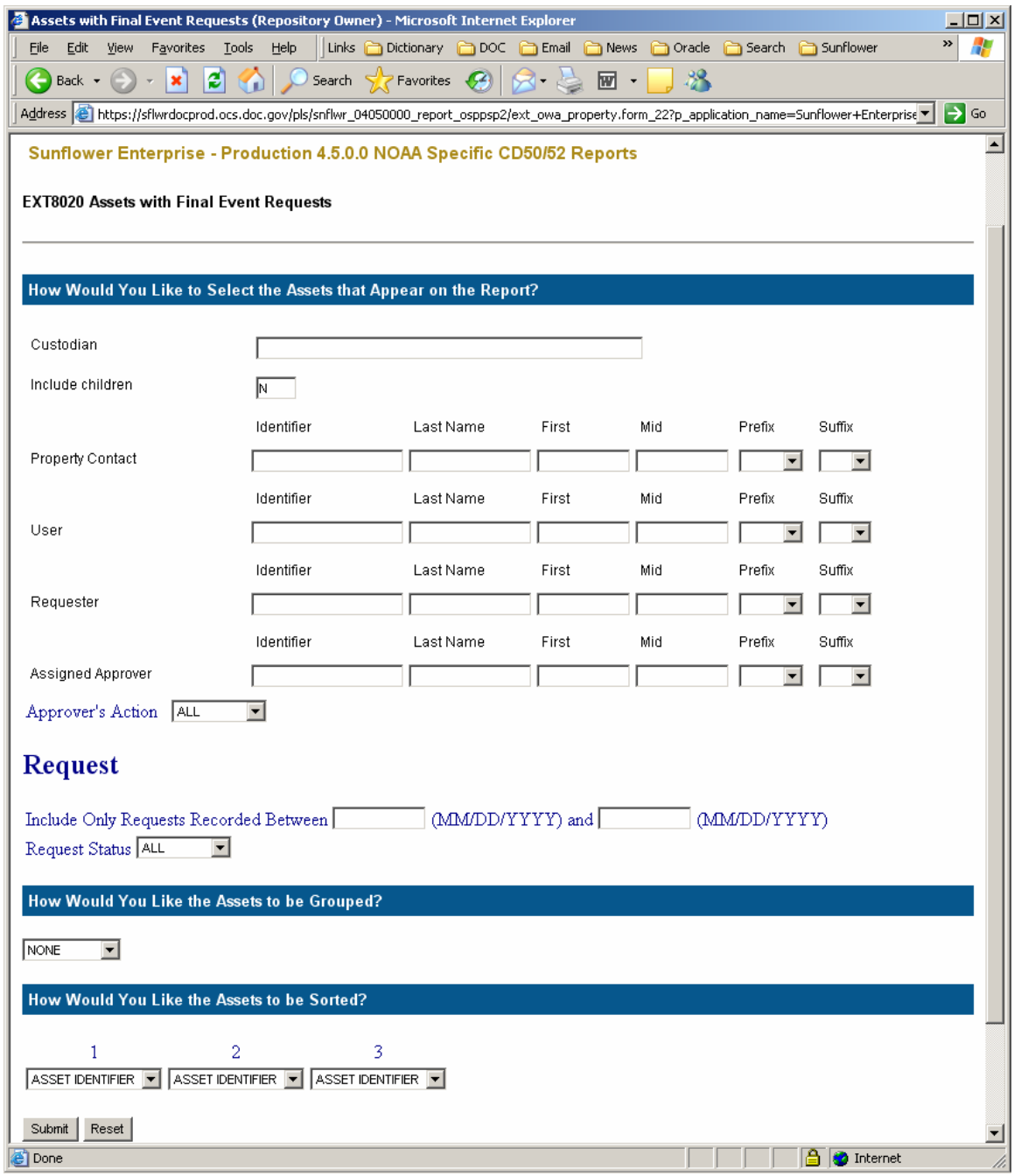

3. Enter your name in the **Assigned Approver** fields to limit the report data to requests requiring your approval.

4. Enter the date range in **Include Only Requests Recorded Between** date fields.

Note: If a PMO is running this report rather than receiving email notification, then the report should be run on a regular basis and the date range will be shorter in duration.

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5. Select how to group the data in the **How Would You Like the Assets to be Grouped?** section.

6. Select the sort order in the **How Would You Like the Assets to be Sorted?** section.

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

Result: The review query criteria screen displays.

8. Select the **Acrobat** radio button.

9. Select the **eXecute** button.

Result: The Assets with Final Event Requests report displays.

Request #	Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Valu
47954	INV CD0000109095	S O	DISPLAY UNIT, CRT	AMES SCIENCE, INC.	3/50 ME-4 W/688	905BM6820	$ 4,935.0

Custodian : 54011M011
Property Contact : OTTO WILLIAM D 7858
User :
Fair Market Value :
Financial Ident.:
Request Date : 09/11/2007
Requester : OTTO WILLIAM D 7858
Requester Phone : 3034976232
Request Status : OPEN
Terminated By :
Final Event Type : DELETE - CORRECTION
Comment : The item is an old sun monitor under 5K, and does not need to be tracked.

Approver's Name	Action	Comment

Request #	Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Valu
47972	INV CD0000290121	O	DETECTOR, GAS	TRACE ANALYTICAL, INC.	RGD2	RGD1-051592-009	$ 10,400.0

Custodian : 54009M003
Property Contact : HARRIS DONNA R 12790
User :
Fair Market Value : $3,000.00
Financial Ident.:
Request Date : 09/12/2007
Requester : HARRIS DONNA R 12790
Requester Phone : 2085262329
Request Status : OPEN
Terminated By :
Final Event Type : TRANSFER - TO ANOTHER AGENCY BY AGENCY
Comment : Transfered to DOE/INEL Property Reutilization & Disposal Office 9/6/07

Approver's Name	Action	Comment

End of activity.

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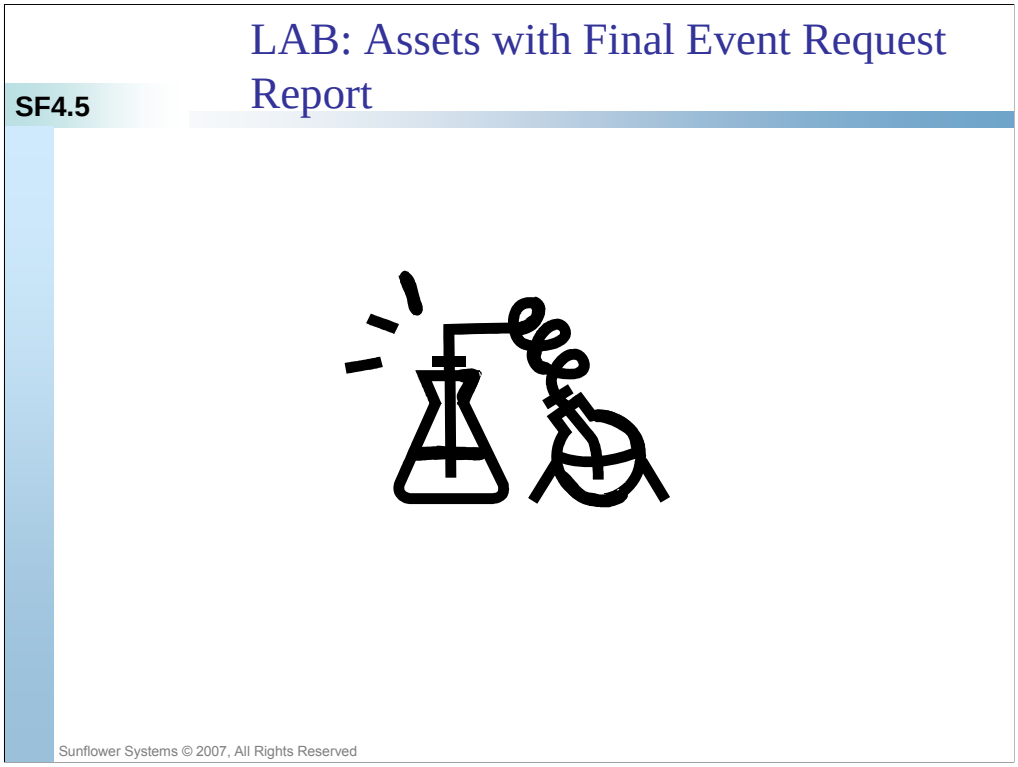
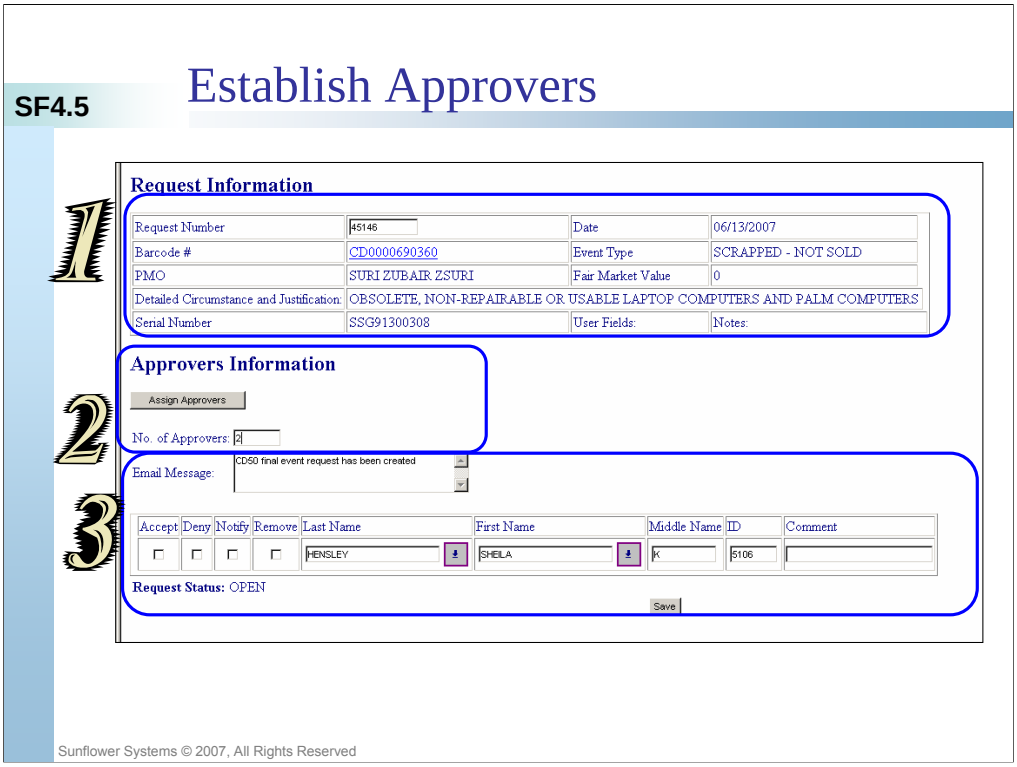


Generate this report using the **Include Only Requests Recorded Between** date range fields. Enter the date range for this week (be sure to include today's date!). Do not enter an approver name. Optionally, you may include your "Training Name" in the **Requester fields**.



The PMO uses the **CD 50 / 52 Transactional Menu** and selects the option **click to Accept/Deny Retirement Requests** to approve or deny a user's request to retire an asset.

Area 1 The PMO uses the Retirement Request Number to recall the request and details about the asset. All the justification information entered by the PC also appears here.

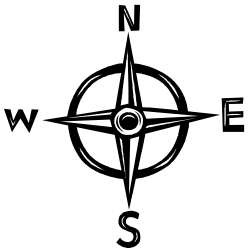
Area 2 At this point the PMO can either add approvers or deny the request. If they are going to approve the request, they first enter the number of approvers (including themselves). Who and how many approvers are assigned depends upon the Bureau as well as the situation. Remember, if the Property Review Board and Executive Property Review Board members are users of Sunflower, they may also review and approver or deny requests electronically rather than via a hard-copy document review and signature.

Area 3 A row appears for the total number of approvers entered in the **No. of Approvers** field. The PMO now selects the Last Name, First Name from the pull-down list to select the approvers for this request. Once approvers have been established, the PMO clicks the Save button which generates an email notification to the approvers – the PMO can add text to the email message prior to saving. Remember, all approvers may also run the report **Assets with Final Event Requests** if they wish. Additionally, the PMO may select the **Notify** checkbox which also sends email notification to the approver requesting they review the retirement request.

Note: Any person listed as an approver can be removed from the list by the PMO if deemed necessary.

NAV: Establish Approvers

SF4.5



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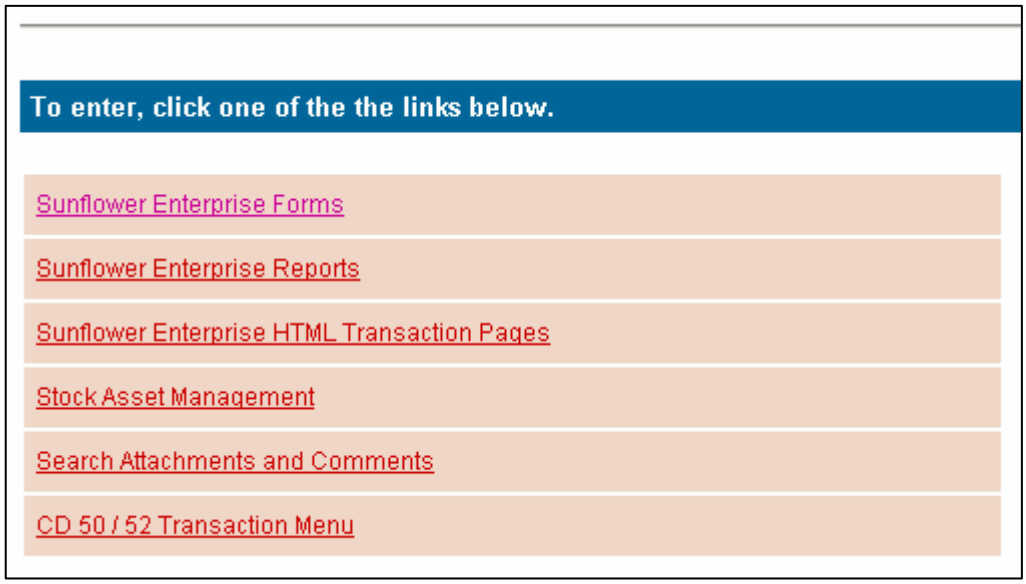
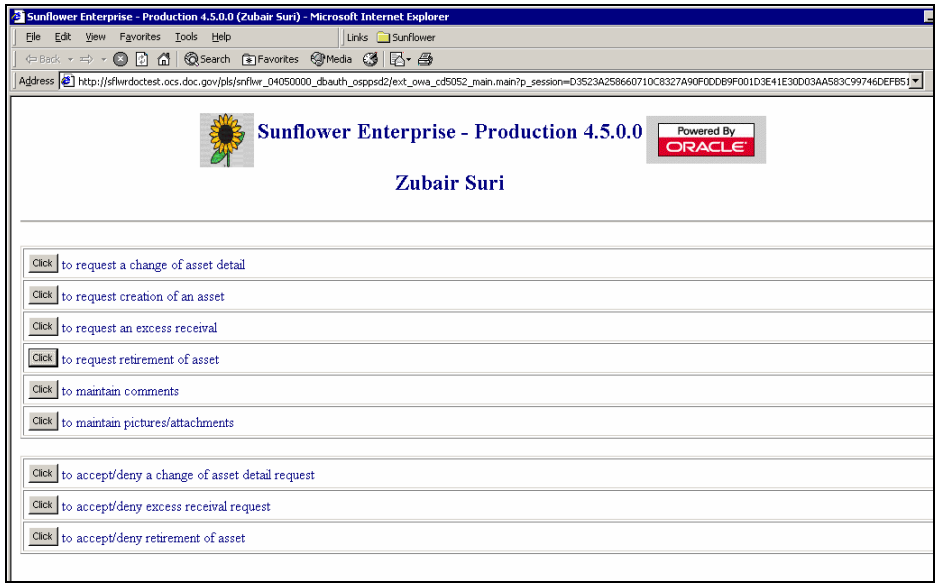
Establish Approvers

Inventory Clerk, Inventory Manager
Sunflower Main Menu > CD 50 / 52 Transaction Menu
CD 50 / 52 Transaction Menu



1. Select the **CD 50/52 Transaction Menu**.

Result: The CD 50/52 Transaction Menu screen displays.



2. Select **Accept/Deny Retirement of Asset**.

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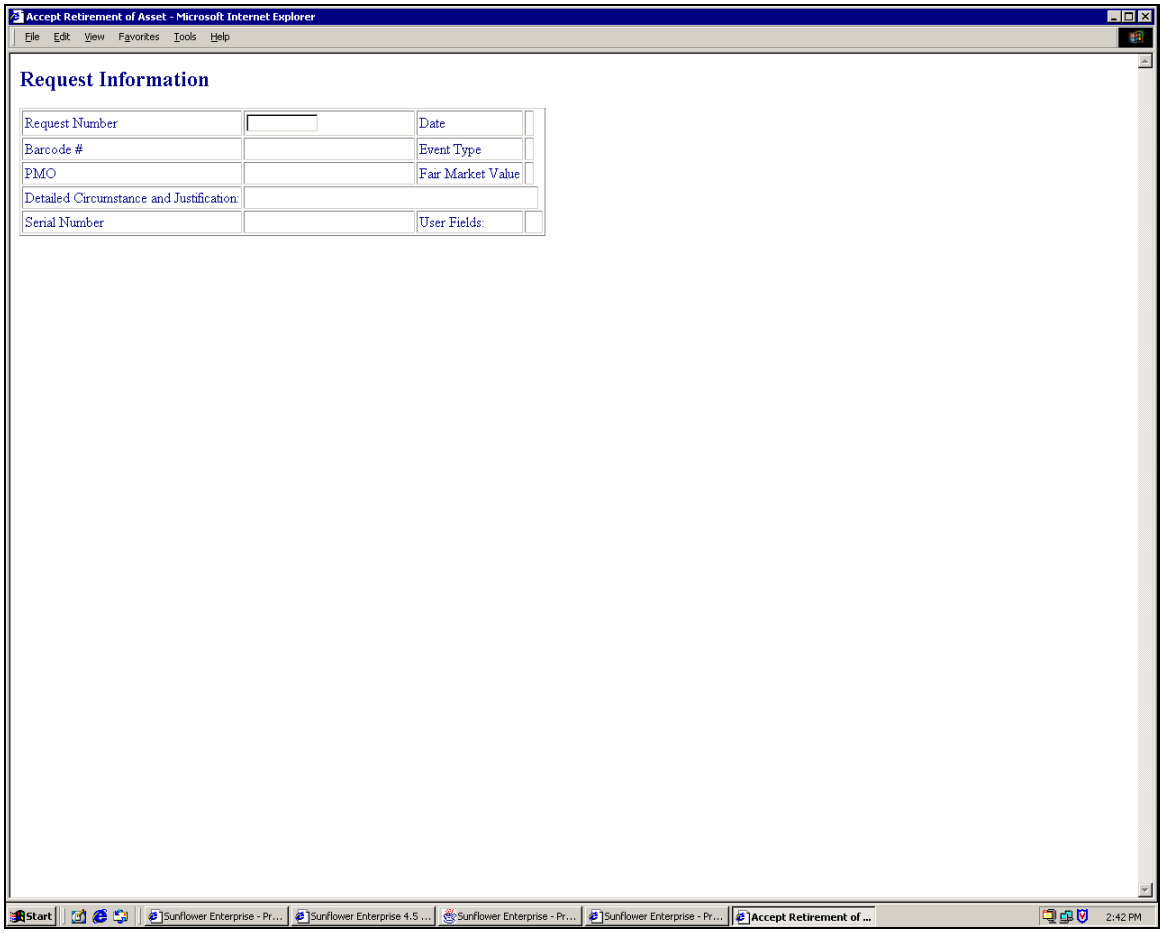
Result: The Request Information screen displays.



3. Enter the **Request Number**.

Result: The fields related to the request number will display.

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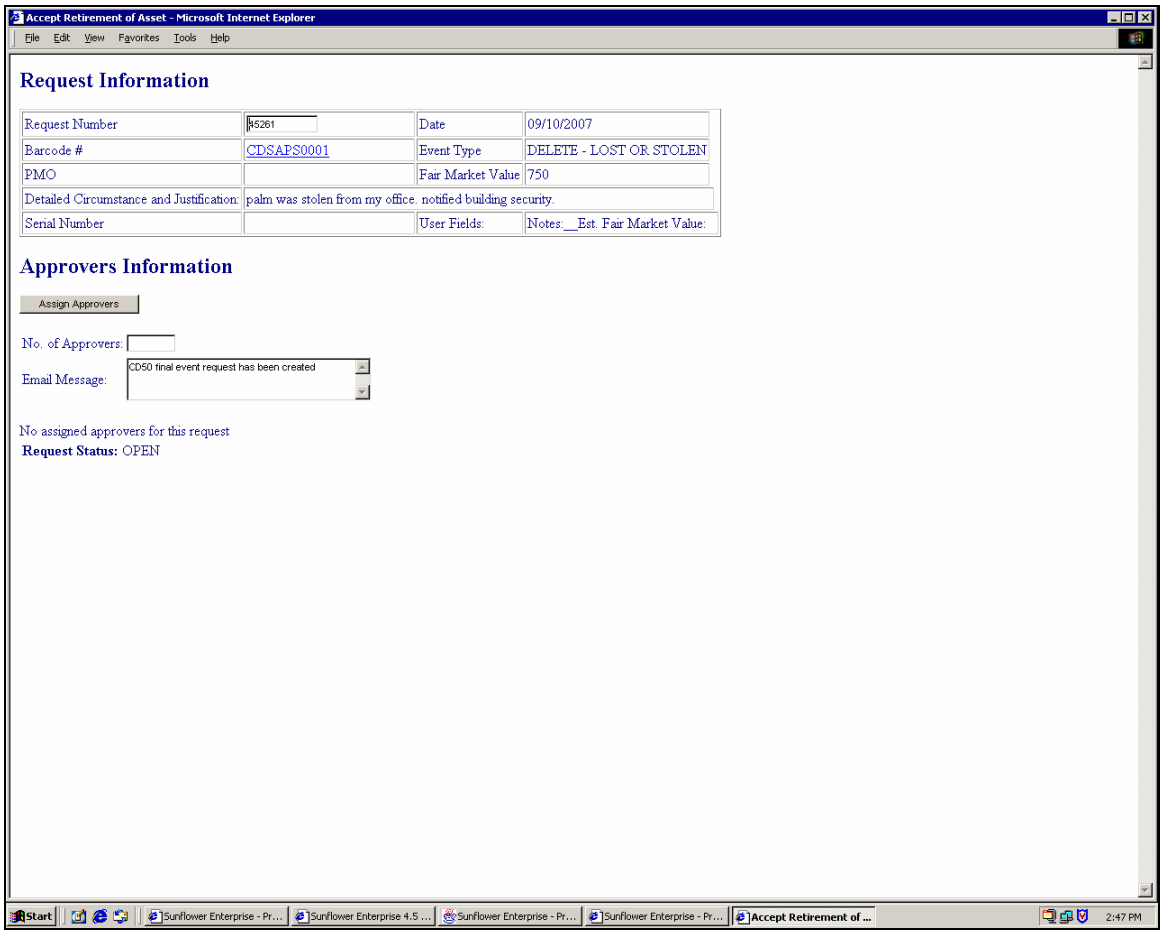

4. Enter the total number of approvers (including you) in the **No. of Approvers** field and **Tab**.

5. Select the **List** button next to last name for the first blank row to assign approvers.

6. Add any additional text to include in the **Email Message** field, if desired.

7. Select the **Save** button when finished adding approver.

<u>Note:</u> Once the approvers are saved, an email is sent to the approvers selected, and the screen displays an OK message next to all the approvers that were added.

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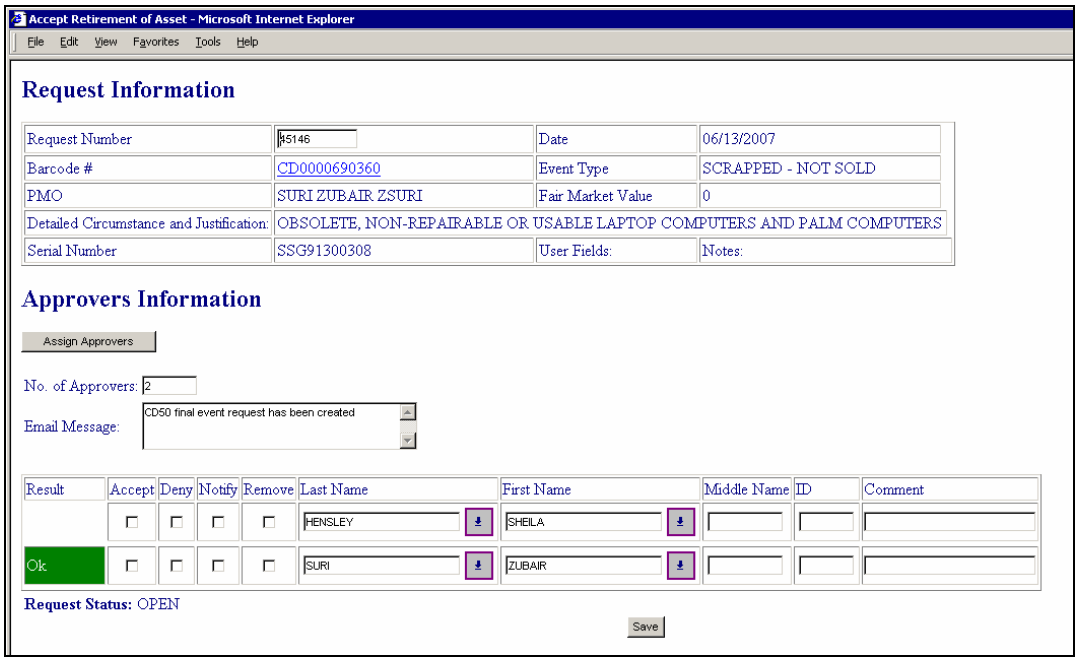

End of activity.

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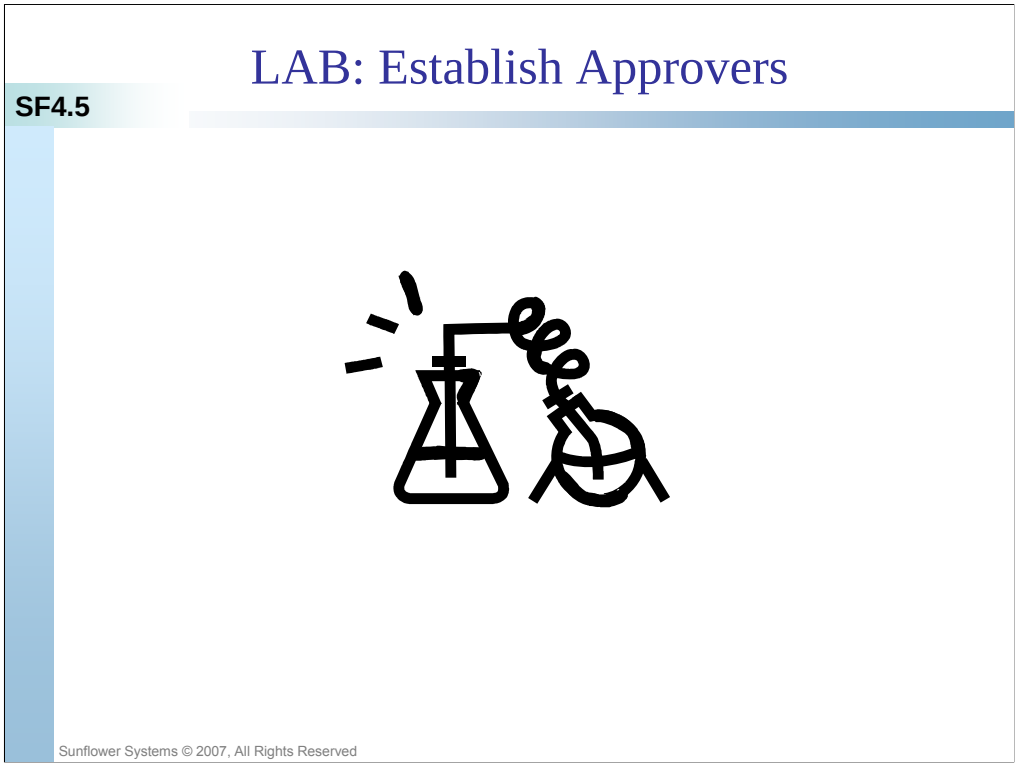
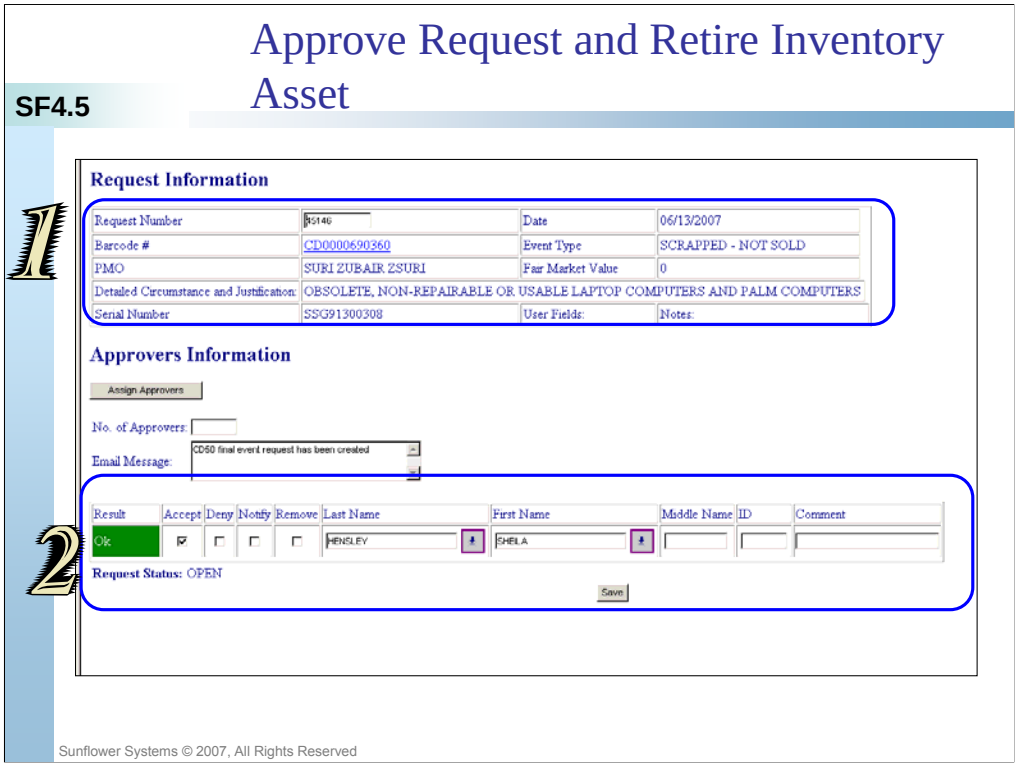


The Instructor will lead the class in this lab.



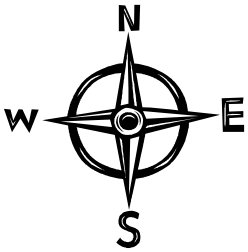
Area 1 The PMO uses the Retirement Request Number to recall the request and details about the asset. All the justification information entered by the PC also appears here.

Area 2 The approver may select **Accept or Deny** from the checkboxes next to his/her name. Once a checkbox is selected and the action is saved a **Result** will appear next to the approver's name. (A PMO is the only one who may select the **Remove** checkbox to remove a name from the approver list.)

If multiple approvers are listed, they may approve in any order. After all the approvers have approved, the PMO will be then approve the retirement request. If any approver denied the request, then the PMO should research the reason for the denial. Upon successfully saving the approval, the asset is retired from Sunflower.

SF4.5

NAV: Approve Request and Retire Inventory Asset



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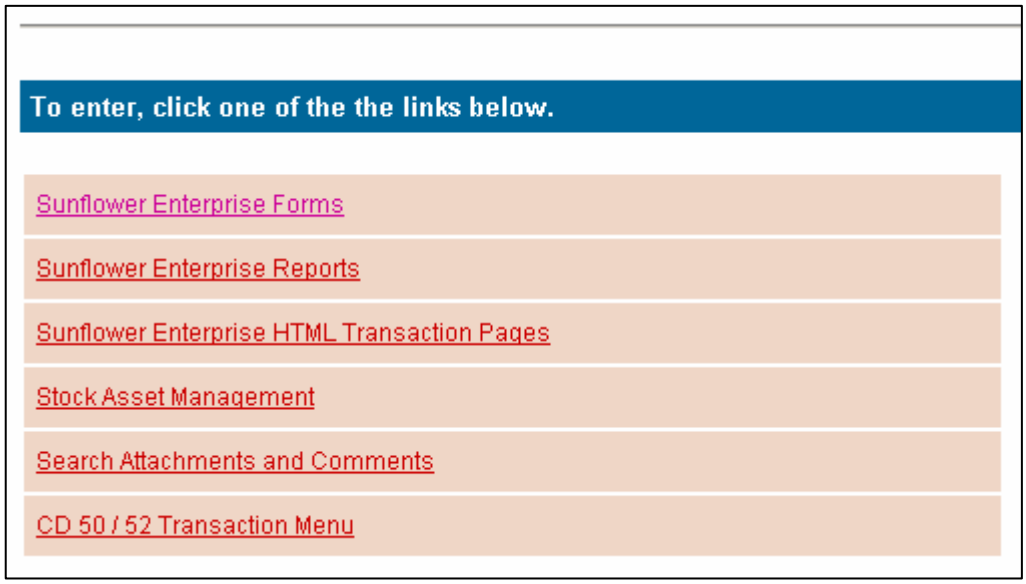
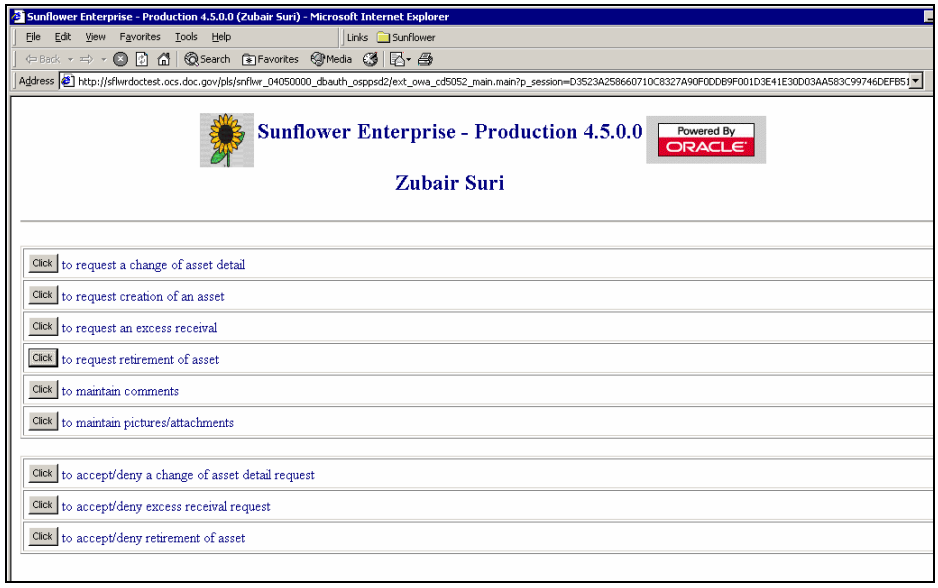
Approve Request and Retire Inventory Asset

Inventory Clerk, Inventory Manager
Sunflower Main Menu > CD 50 / 52 Transaction Menu
CD 50 / 52 Transaction Menu



1. Select the **CD 50/52 Transaction Menu**.

Result: The CD 50/52 Transaction Menu screen displays.



2. Select **Accept/Deny Retirement of Asset**.

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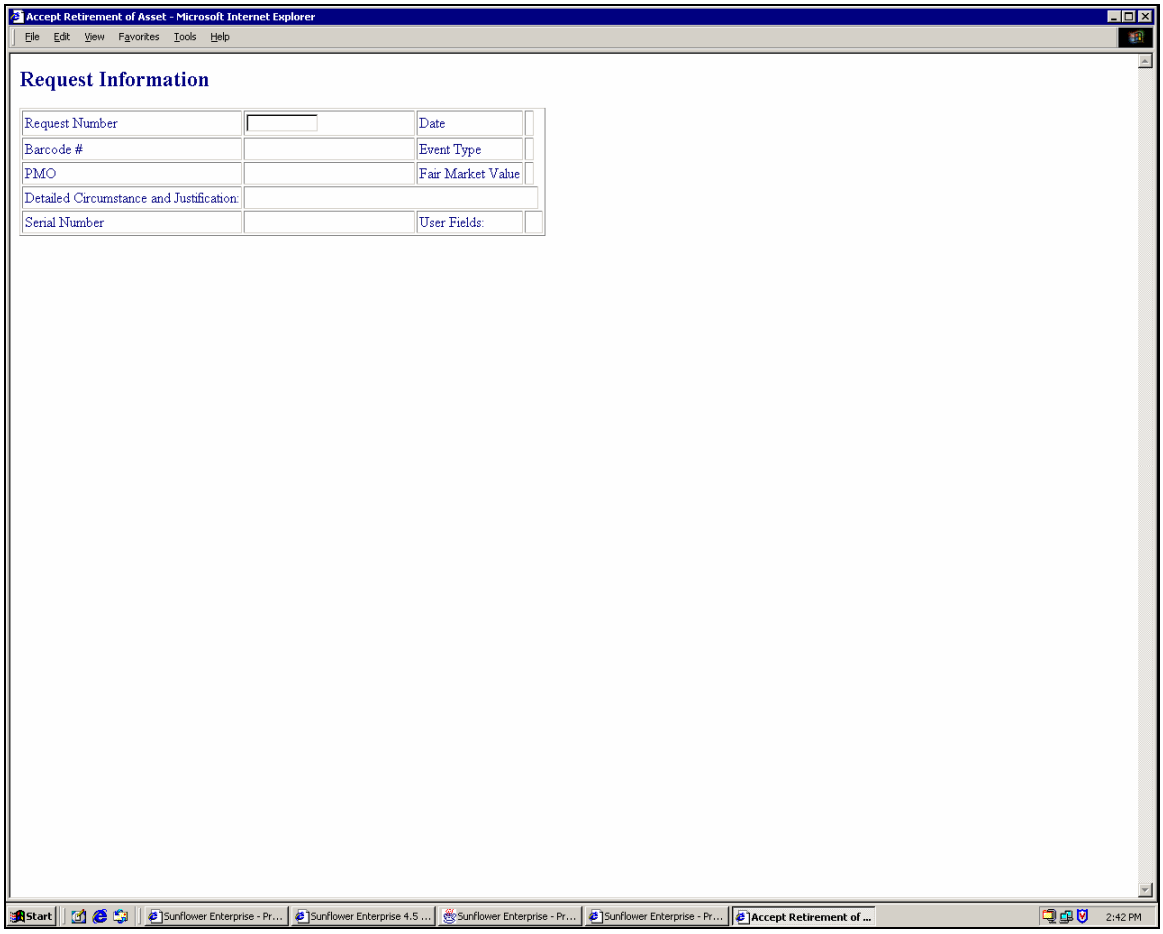
Result: The Request Information screen displays.



3. Enter the **Request Number**.

Result: The fields related to the request number will display.

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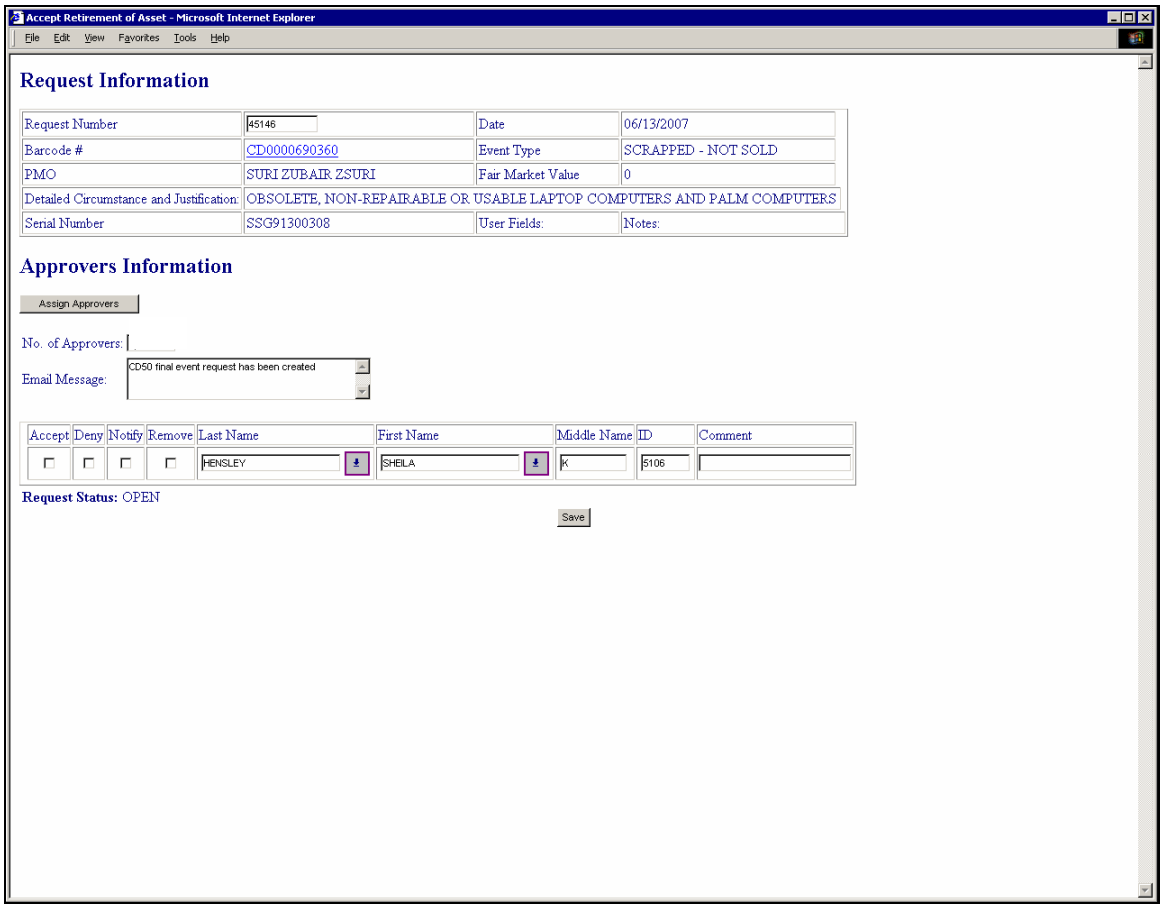

4. Select the **Accept** checkbox next to your name.

Note: Alternatively, users may also deny requests, or notify or remove themselves from the approval process.

5. Select the **Save** button to accept the retirement request.

Note: The Retirement Request is processed and the asset is retired. A Result message appears next to the approver's name.

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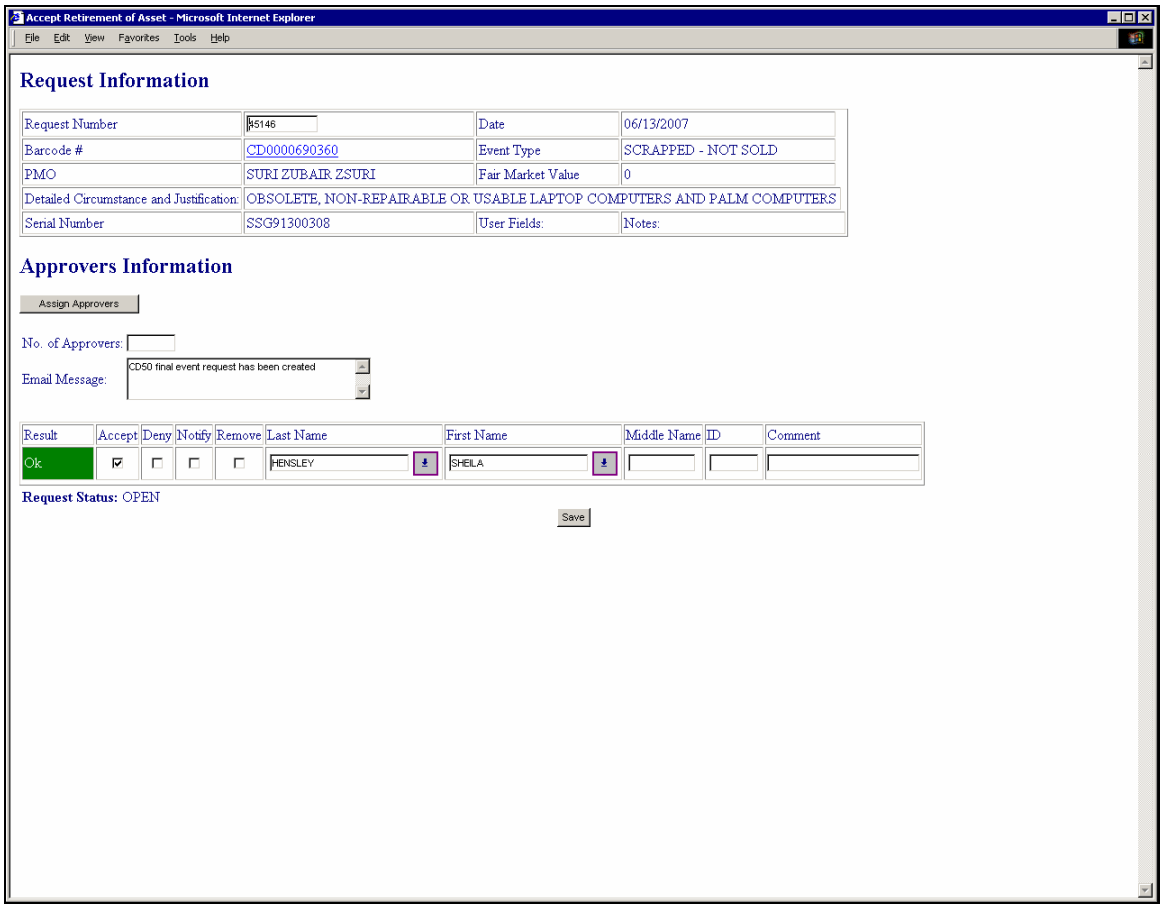
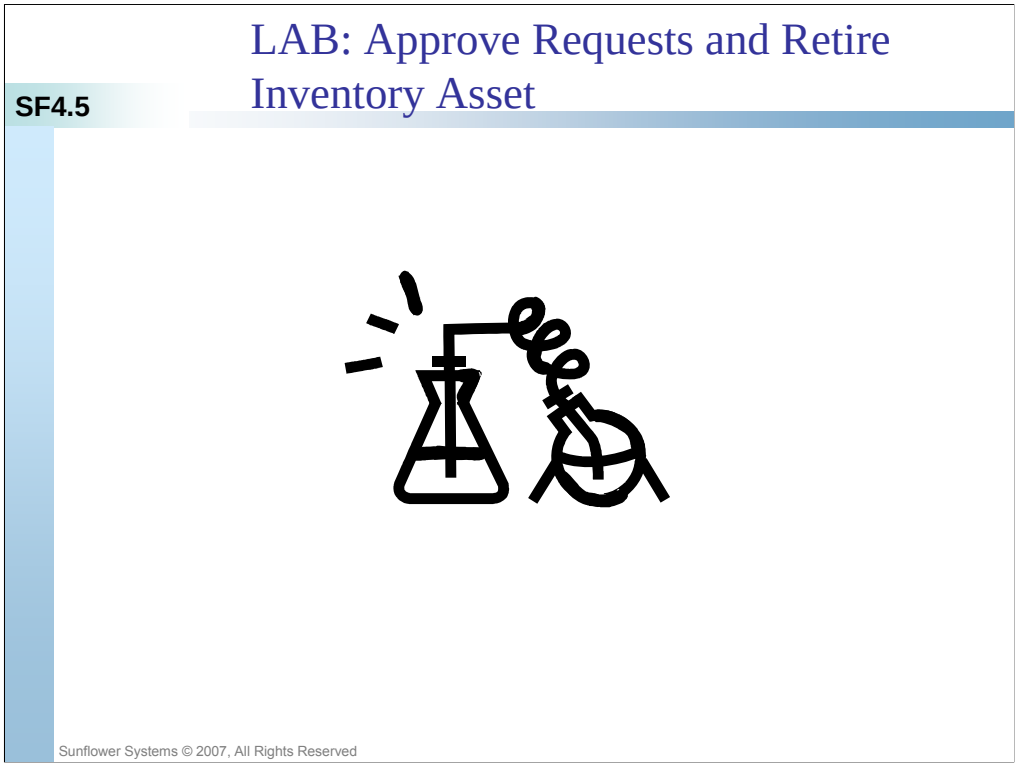
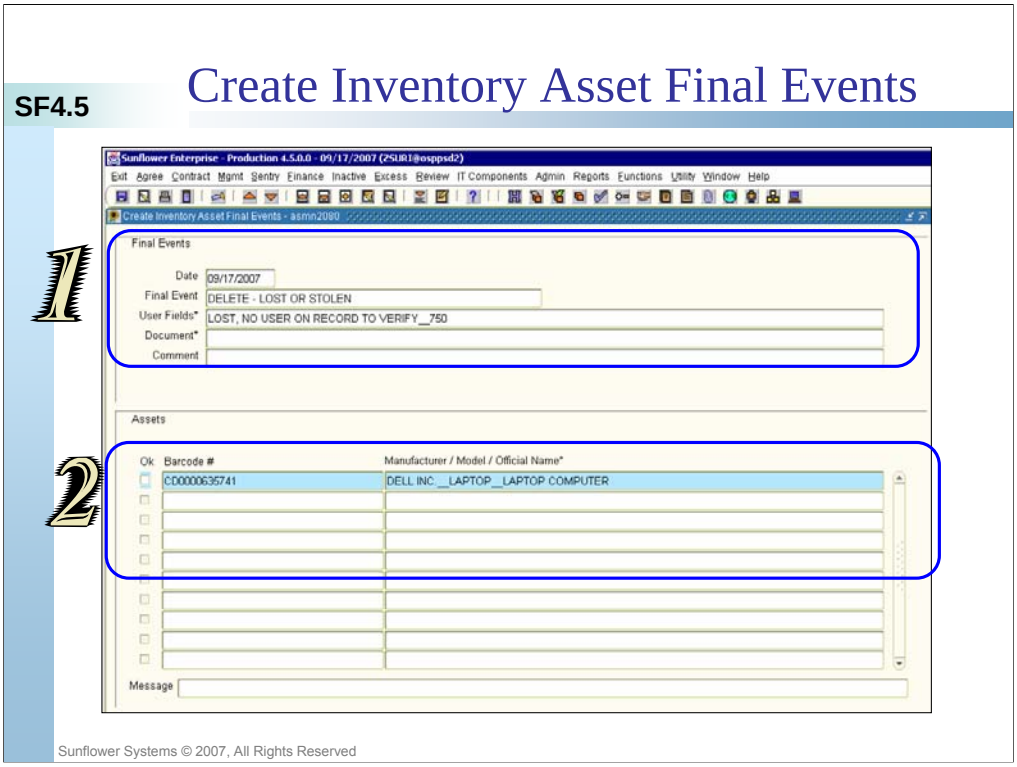


End of activity.

Sunflower Systems © 2007, All Rights Reserved



The instructor will lead the class in this Lab. Each student will be approving the retirement request using their “Training Name” from their Login Information Card.



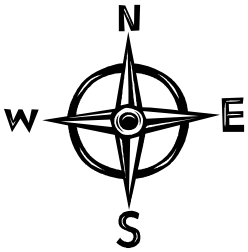
In the rare event that an asset needs to be retired without a CD 50 / 52 Transaction Menu, Request to Retire an Asset, the PMO may complete the Create Inventory Asset Final Events screen.

Area 1 Enter the final event details here.

Area 2 Enter the Barcode Number(s) of the asset(s) being retired in the **Barcode #** field.

SF4.5

NAV: Create Inventory Asset Final Events



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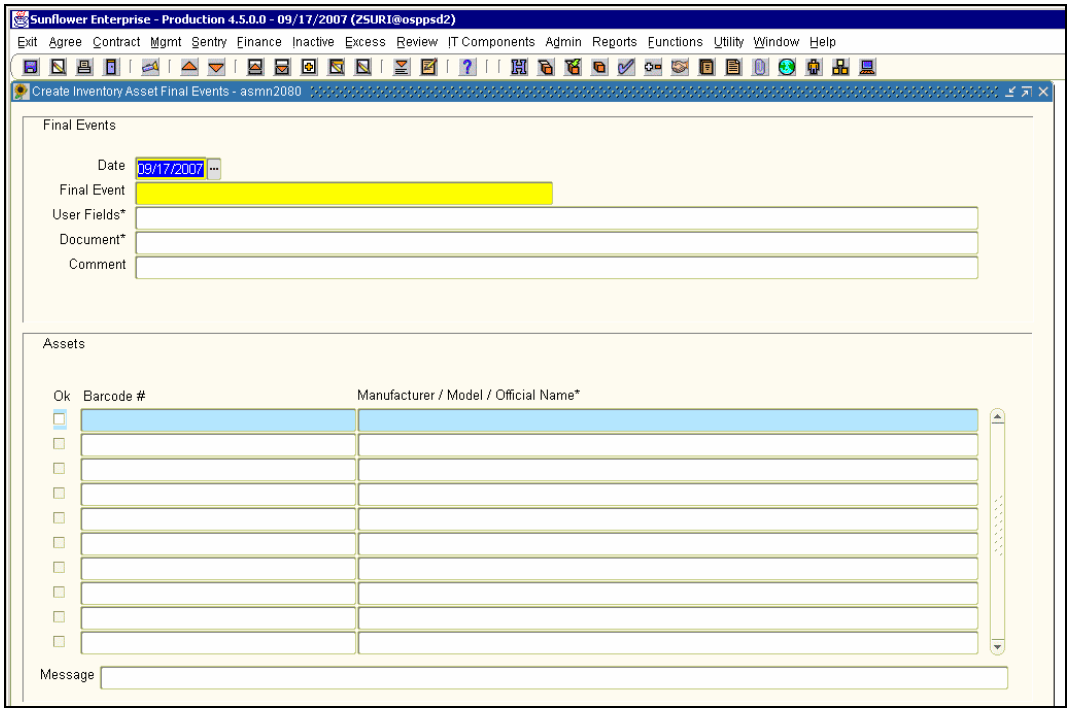
Create Inventory Asset Final Events

Inventory Clerk, Inventory Manager
M > Mgmt > Create Inventory Asset Final Event
Create Inventory Asset Final Event



1. Select appropriate value from the **Final Event** LOV.

2. Double click the **User Fields** to launch the User Defined Fields.

<u>Result:</u> The Final Event User Fields are displayed based upon the selection from the Final Event field.

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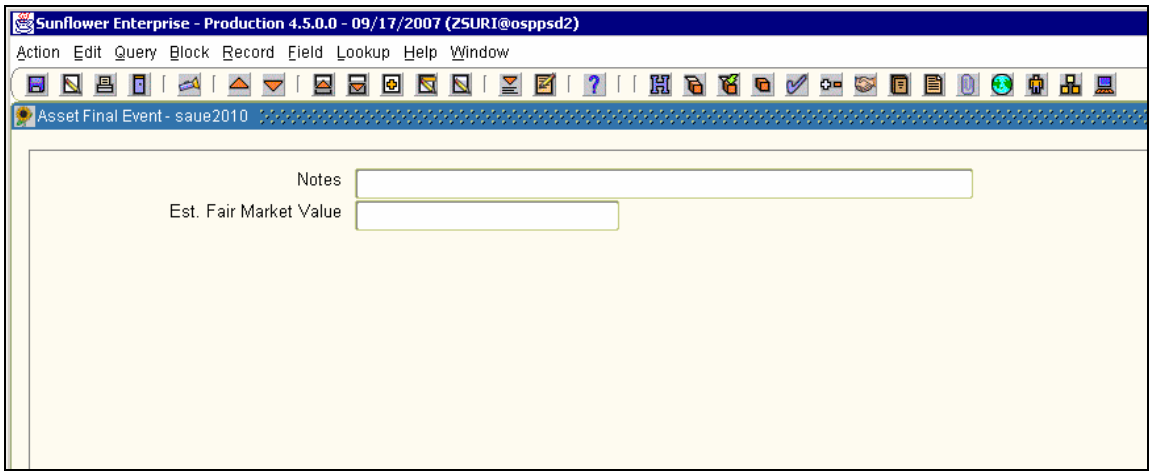
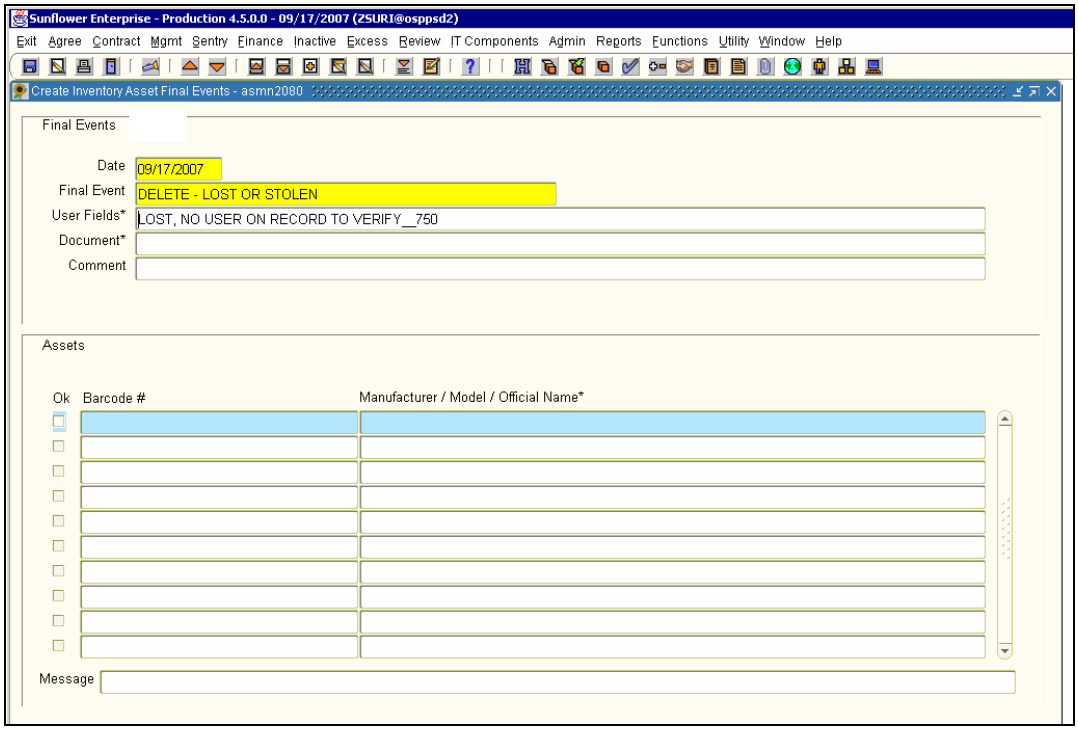


3. Enter the reason for the final event in the **Notes** field.

4. Enter the cost of the asset in the **Est. Fair Market Value** field.

5. Select **Save** from the toolbar to save the User Fields and return to the Create Inventory Asset Final Event screen.

Result: You will be returned to the Create Inventory Asset Final Event window.



6. Enter the barcode number of the asset being assigned a final event in the **Barcode #** field and Tab.

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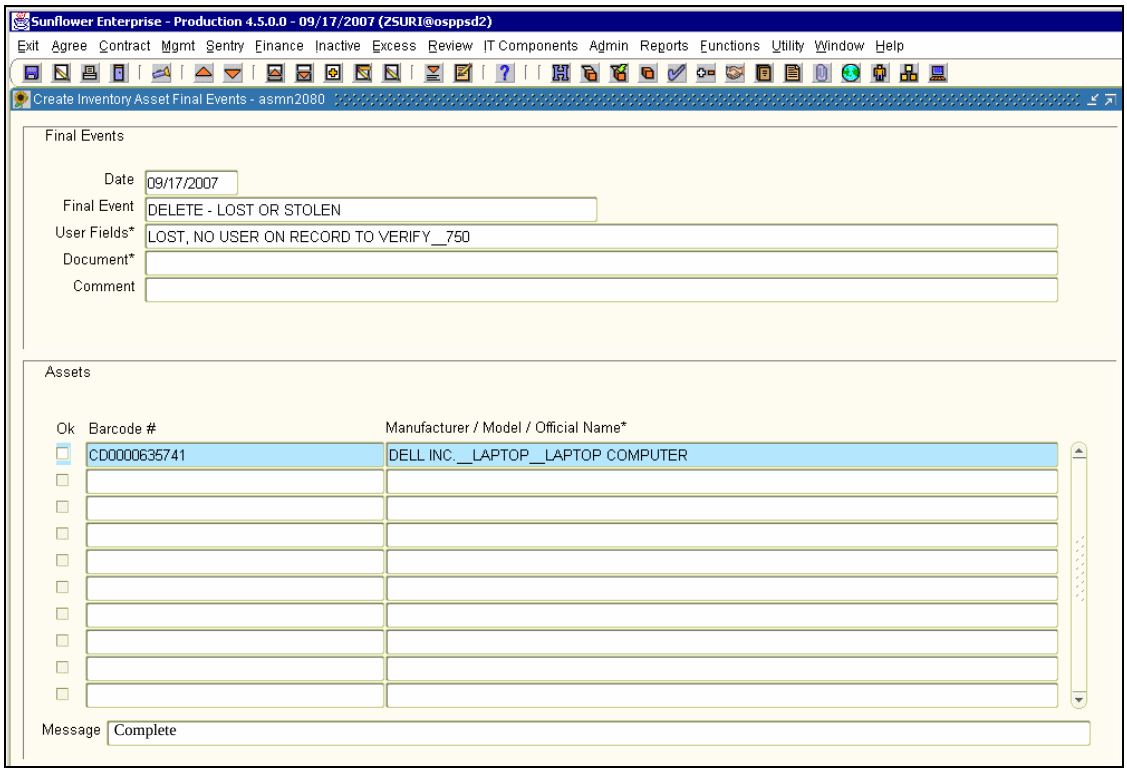
Note: The Manufacturer, Model, and Official Name will autofill and cannot be changed.

7. Optionally enter additional barcode numbers in the **Barcode #** fields for any other assets you wish to retire.

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

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



End of activity.

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Lesson Summary

SF4.5

You should now be able to:

- Summarize the steps used to retire assets
- Complete the CD 50 / 52 Retirement Request Form
- Establish an approver path for retiring assets
- Approve and Retire assets

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SF4.5

Chapter 11:
Review & Sunflower Help

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SF4.5

Lesson Objectives

After this lesson you should be able to:

- Set Email Notifications
- Describe help available to users
- Identify forms to complete for help
- Review the business process flows

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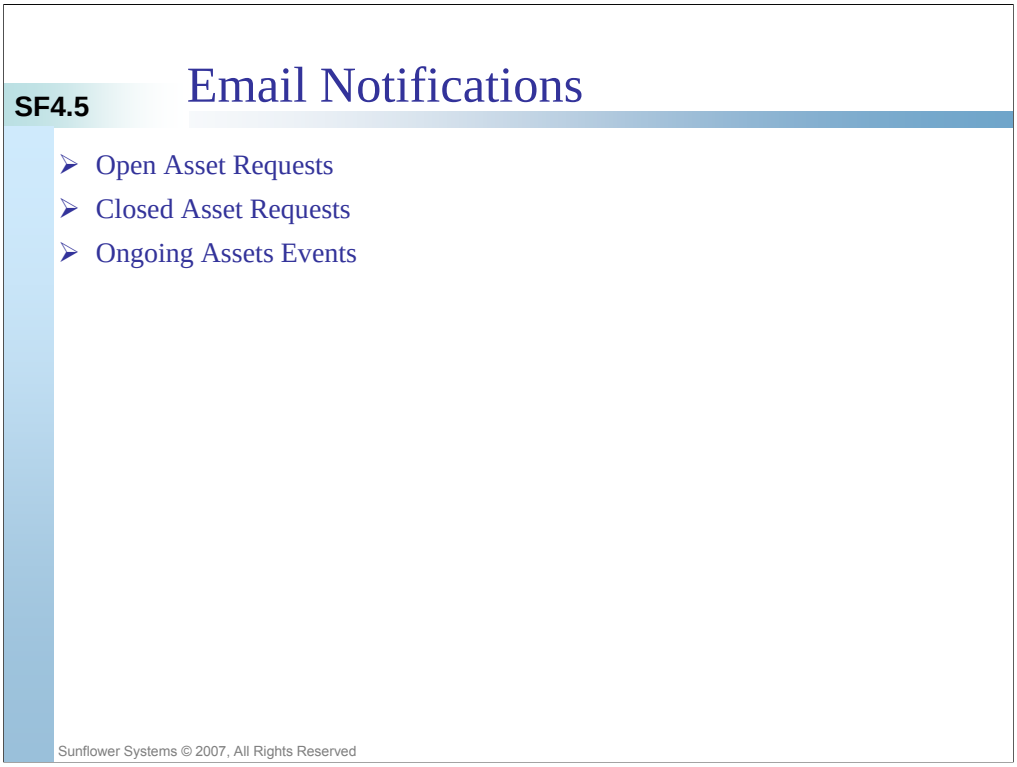
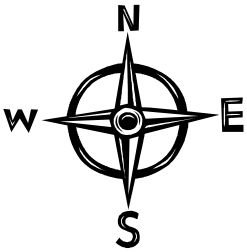


Email notifications will be established for Sunflower Users. Sunflower allows for the Custodial Area (PC), Property Contact and User to be notified when events happen. For Open and Closed Asset Requests notifications can be established for current and requested PC, Property Contact and User. For Ongoing Events notifications can be sent prior to the event and after the event.

Sunflower will be configured initially, but users may change their settings if they desire using the HTML Transaction Pages.

SF4.5

NAV: Select Asset Event Email Notifications



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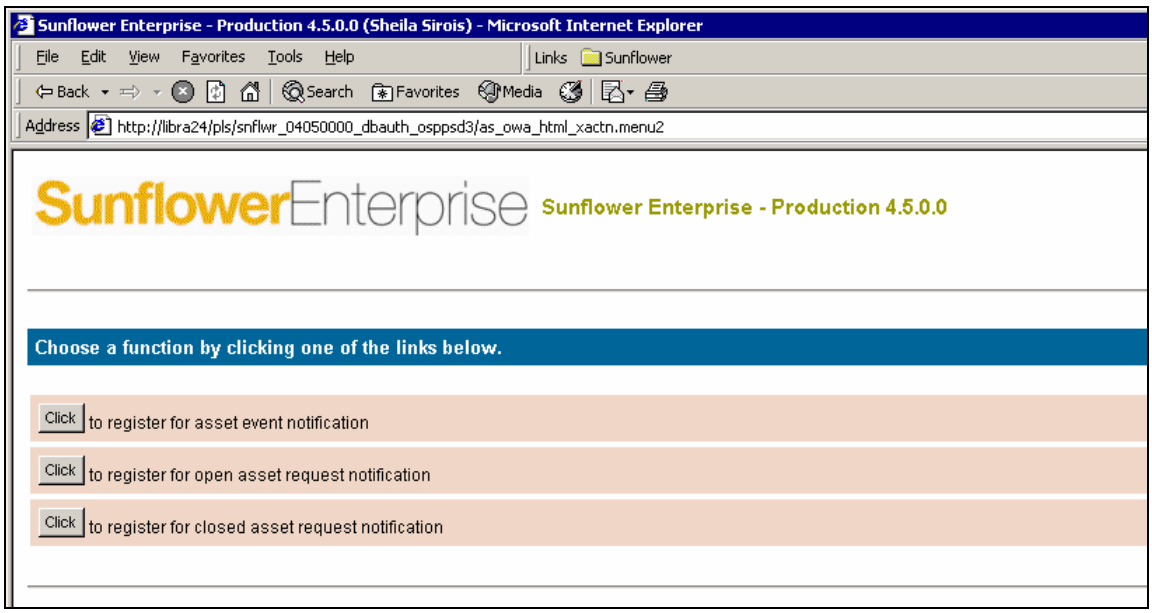
Select Asset Event Email Notifications

Inventory Clerk Sunflower Enterprise HTML Transaction Page > Click to Register for an e-mail notification Click to Register for an e-mail notification



1. Select **click to register for asset event notification** button.

<u>Note:</u> This sets email notifications regarding ongoing events.

<u>Result:</u> The Currently registered notifications for asset events appears.

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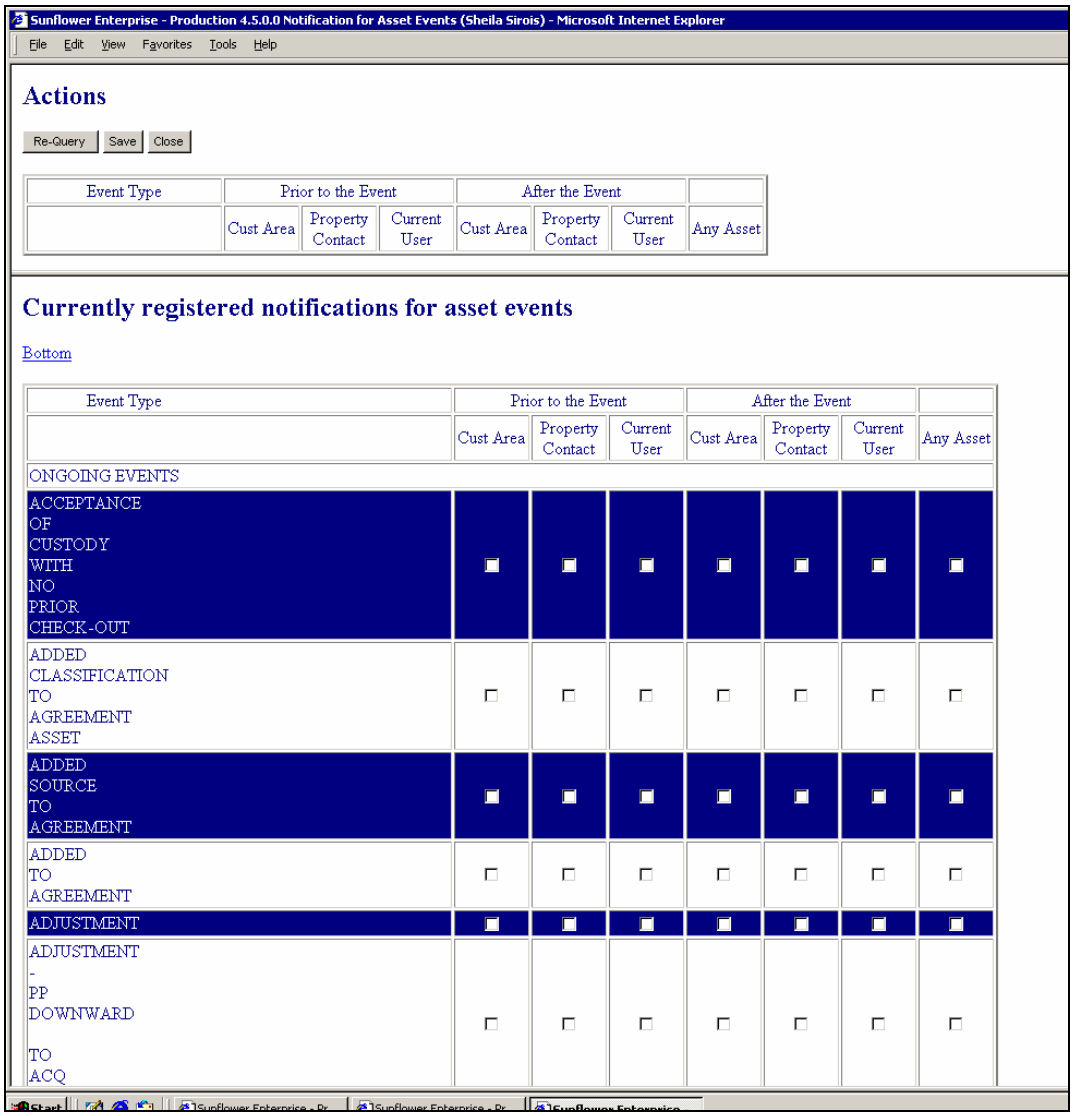

2. Select the **checkbox** for the type of event for which you wish to receive email notification.

Field	Description
Prior to the Event	Receive email notification where you are listed as the Custodial Area, Property Contact or User prior to the action taken on the asset.
After the event	Receive email notification where you are listed as the Custodial Area, Property Contact or User after the action taken on the asset.
Custodial Area	Receive email notification for assets within your custodial area.
Property Contact	Receive email notification for assets that list you as the Property Contact.

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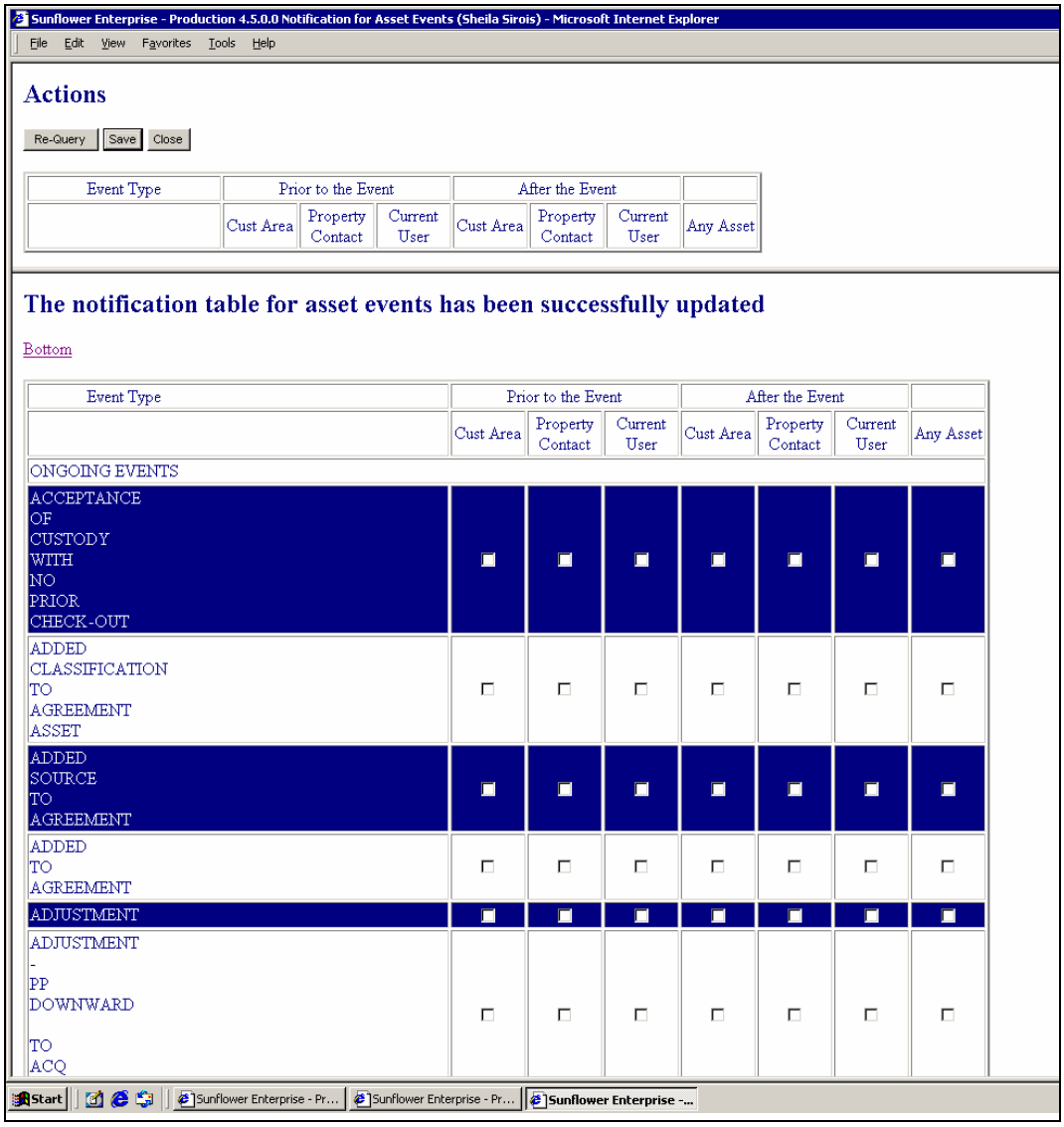
User	Receive email notification for assets that list you as the current user.
Any Asset	Never select this column. If selected you will receive email notification for action being taken on any asset in the DOC regardless of Bureau or Custodial Area.

3. Select the **Save** button to save your selection.

Result: Your asset event email notification selections have been saved and a message appears at the top of the screen.



End of activity.

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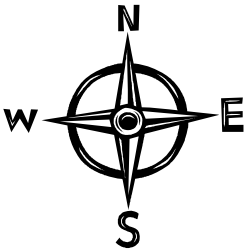
SF4.5

NAV: Select Open Asset Request Email Notifications



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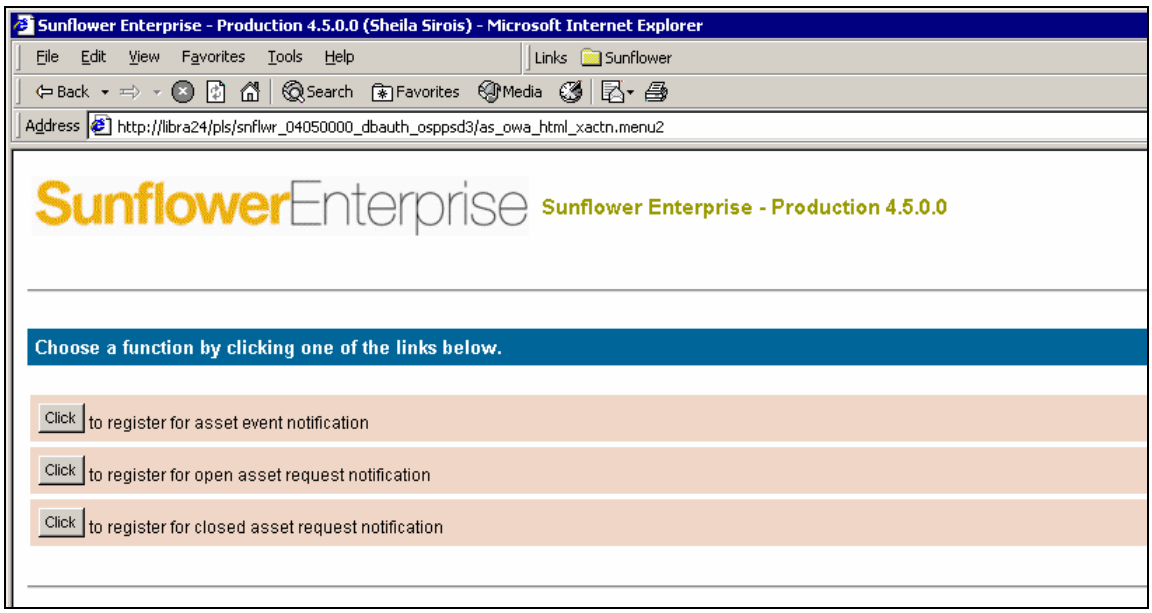
Select Open Asset Request Email Notifications

Inventory Clerk Sunflower Enterprise HTML Transaction Page > Click to Register for an e-mail notification Click to Register for an e-mail notification



1. Select the **click to register for open asset request notification** button.

<u>Note:</u> This sets email notifications when a request has been made to update or change information relating to an asset.

<u>Result:</u> The Currently registered notifications for open asset requests appears.

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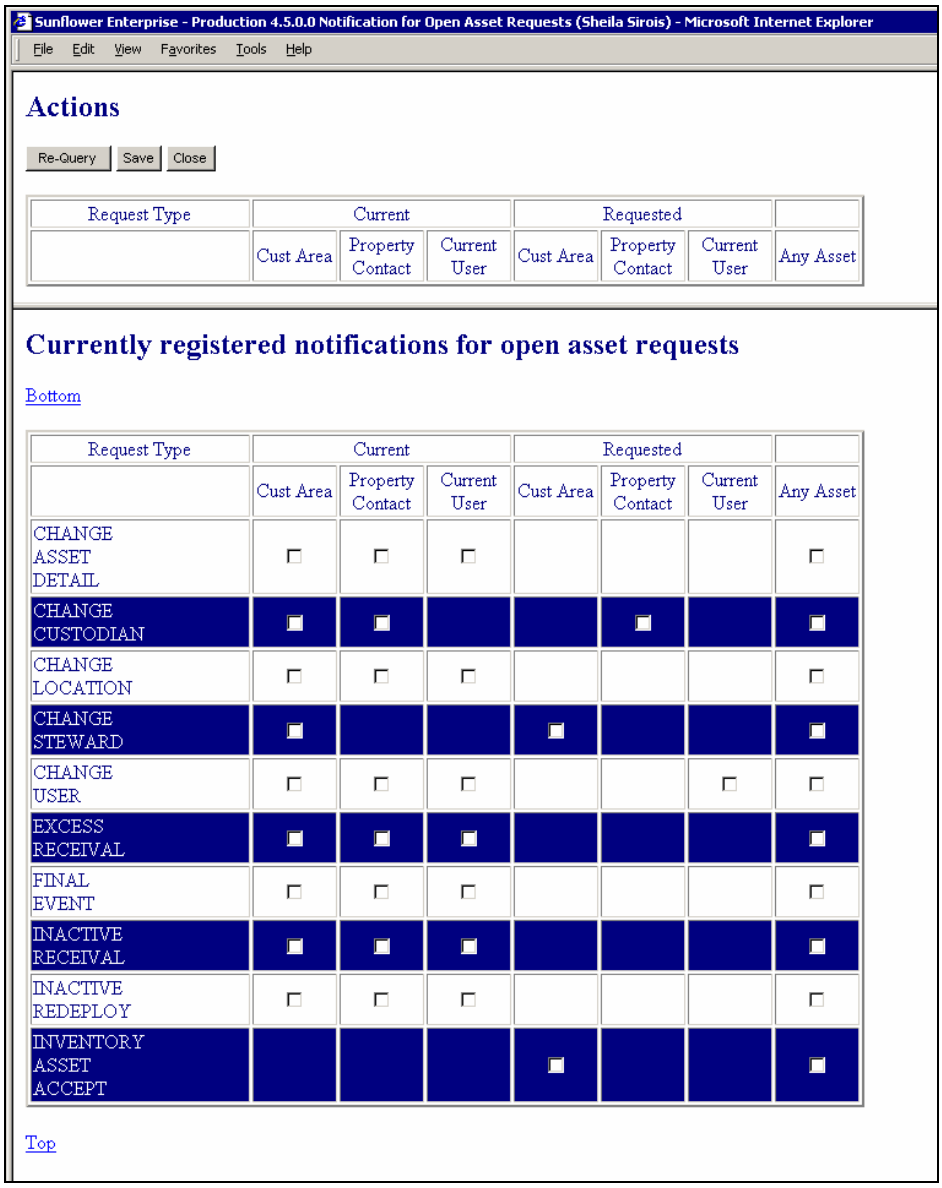

2. Select the **checkbox** for the type of event for which you wish to receive email notification.

Field	Description
Current	Receive email notification where you are listed as the *current* Custodial Area, Property Contact or User.
Requested	Receive email notification where you are listed as the *requested* Custodial Area, Property Contact or User.
Custodial Area	Receive email notification for assets within your custodial area.
Property Contact	Receive email notification for assets that list you as the Property Contact.

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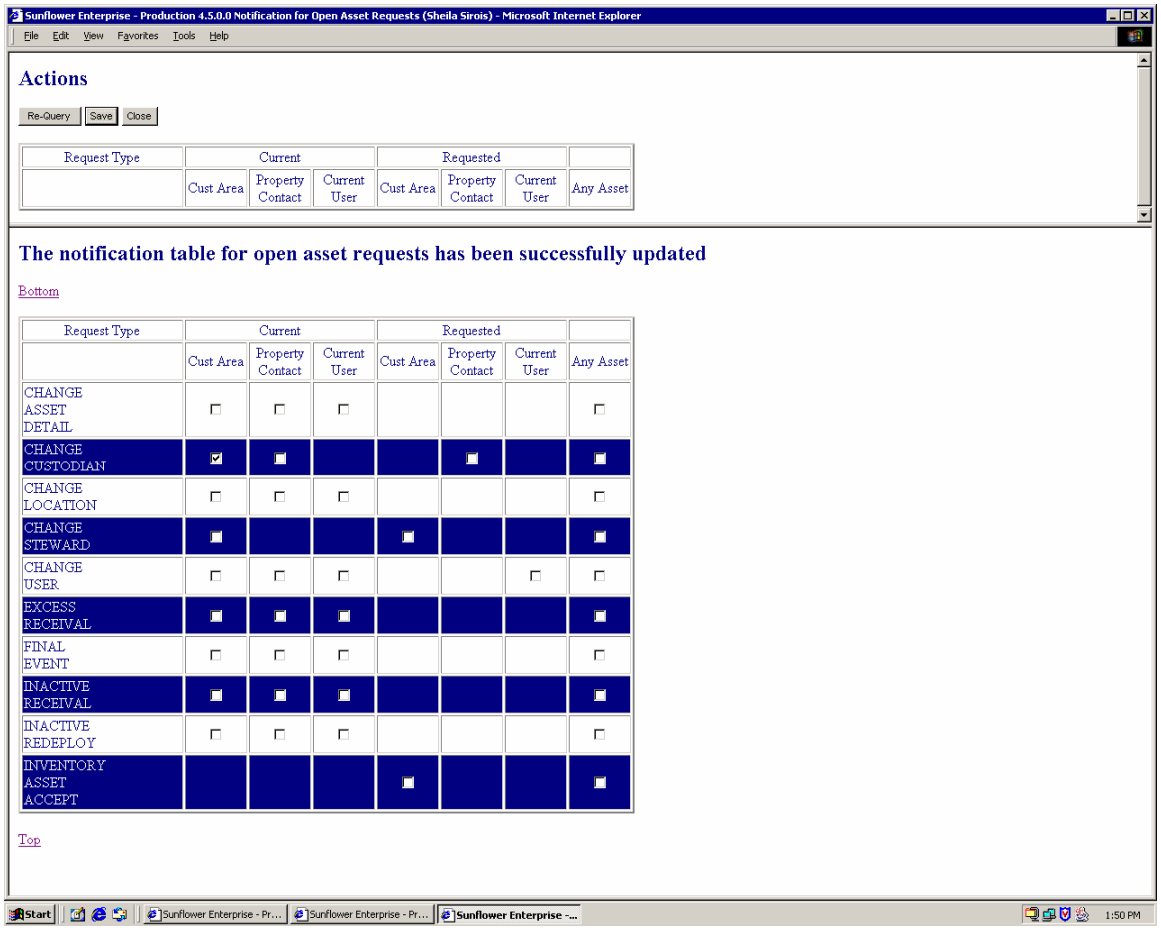
User	Receive email notification for assets that list you as the current user.
Any Asset	Never select this column. If selected you will receive email notification for action being taken on any asset in the DOC regardless of Bureau or Custodial Area.

3. Select the **Save** button to save your selection.

Result: Your open asset requests email notification selections have been saved and a message appears at the top of the screen.



End of activity.

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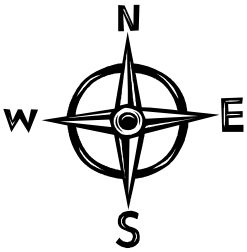
SF4.5

NAV: Select Closed Asset Request Email Notifications



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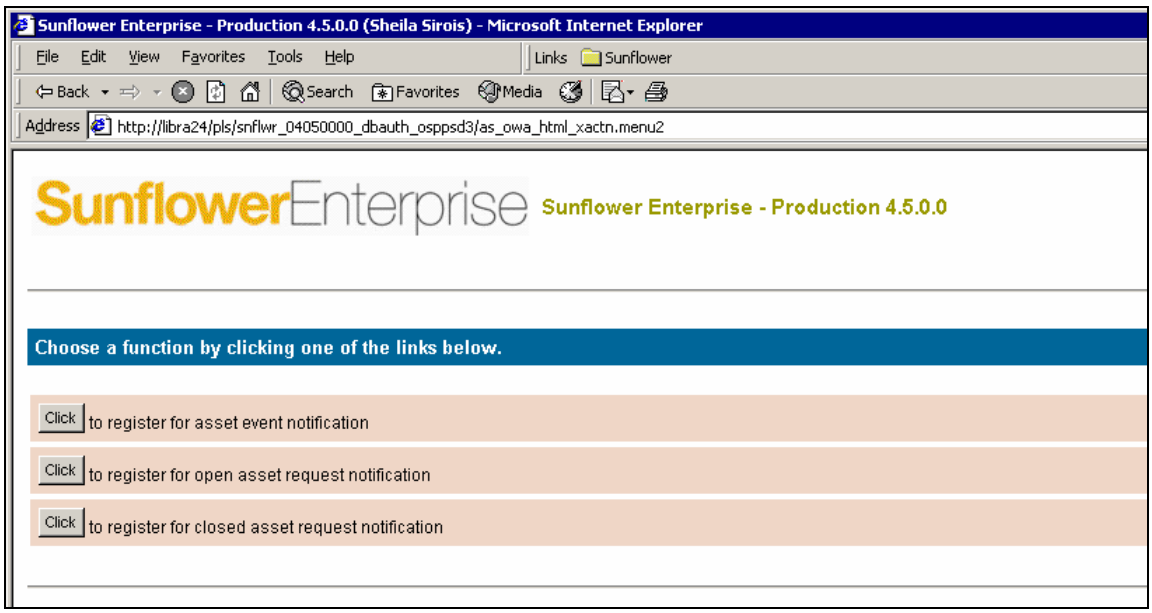
Select Closed Asset Request Email Notifications

Inventory Clerk Sunflower Enterprise HTML Transaction Page > Click to Register for an e-mail notification Click to Register for an e-mail notification



1. Select **click to register for closed asset request notification** button.

<u>Note:</u> This sets email notifications when a request to update or change information has been accepted, denied or withdrawn.

<u>Result:</u> The Currently registered notifications for closed asset requests appears.

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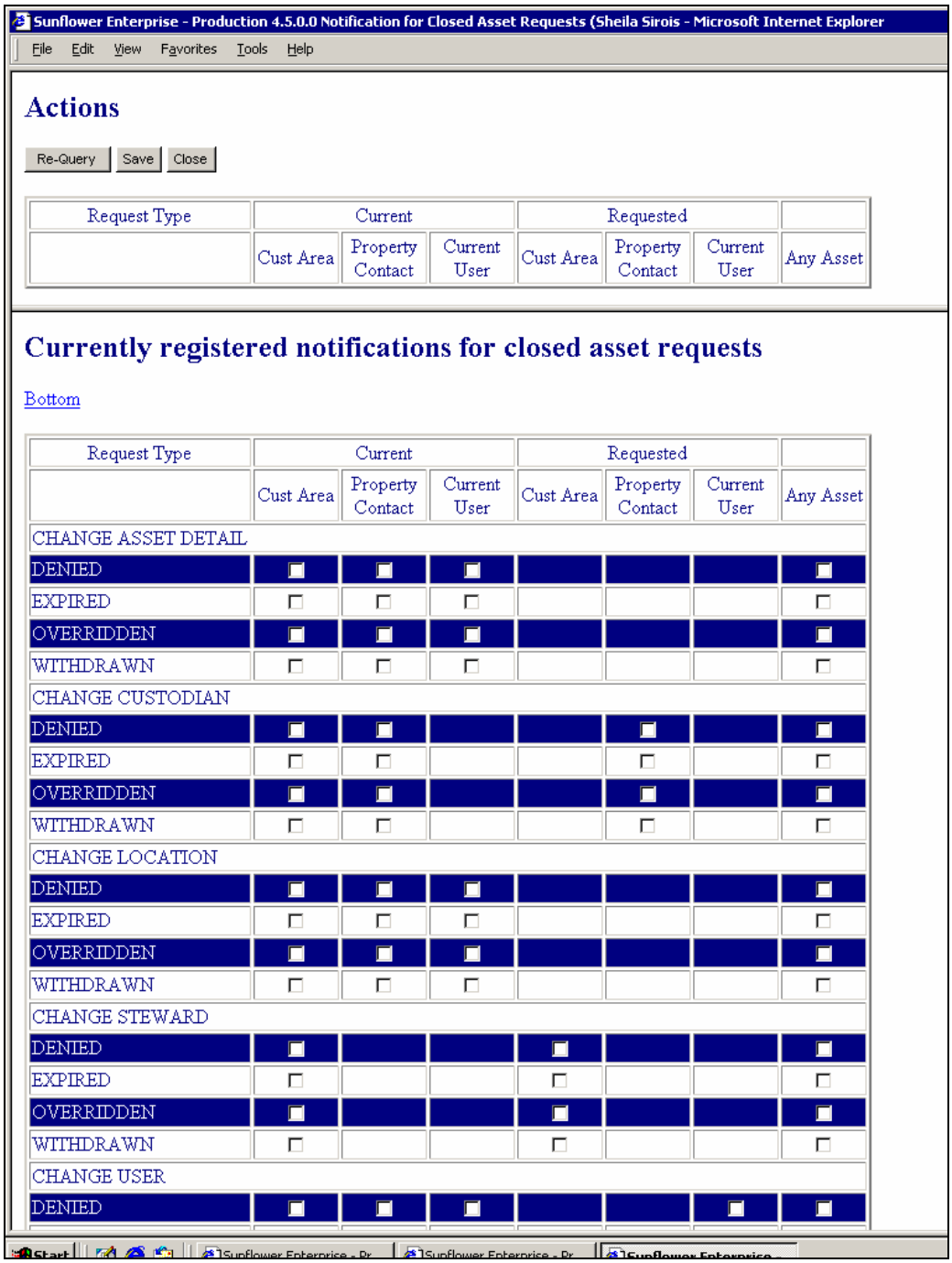

2. Select the **checkbox** for the type of event for which you wish to receive email notification.

Field	Description
Current	Receive email notification where you are listed as the *current* Custodial Area, Property Contact or User.

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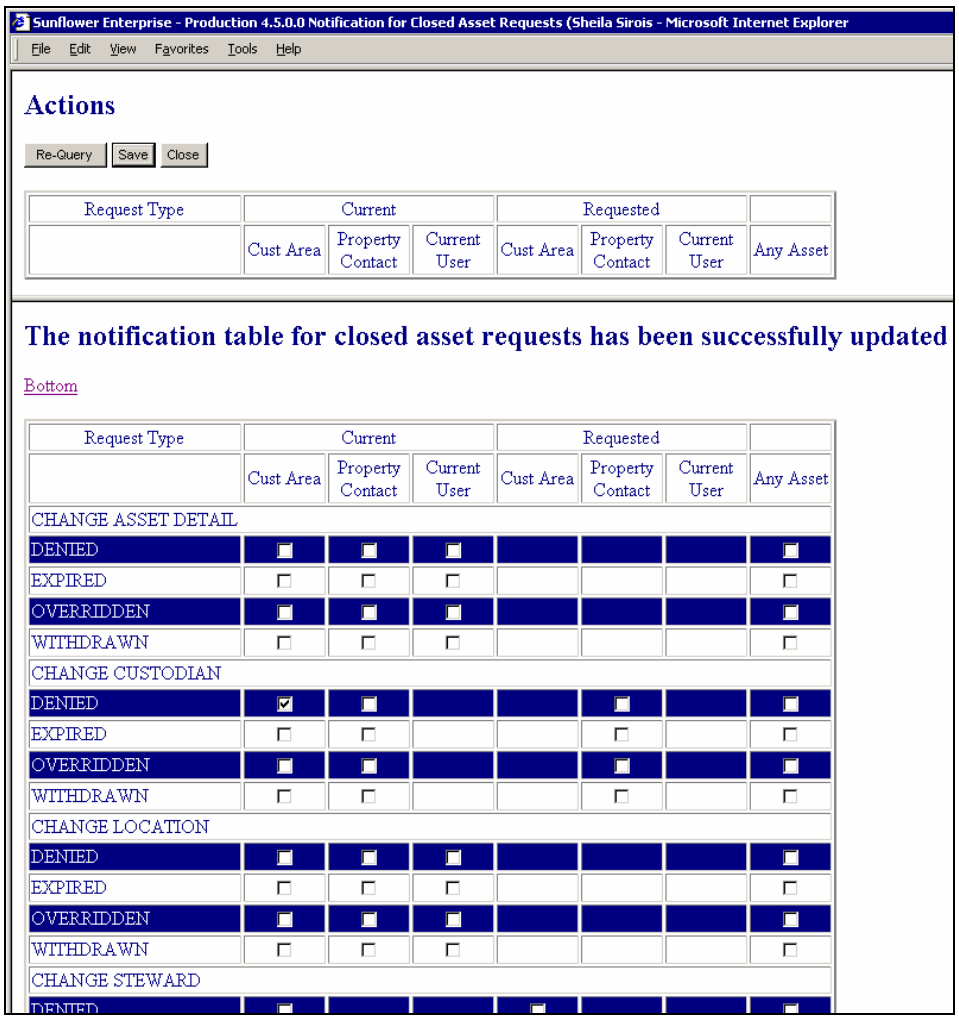
Requested	Receive email notification where you are listed as the *requested* Custodial Area, Property Contact or User.
Custodial Area	Receive email notification for assets within your custodial area.
Property Contact	Receive email notification for assets that list you as the Property Contact.
User	Receive email notification for assets that list you as the current user.
Any Asset	Never select this column. If selected you will receive email notification for action being taken on any asset in the DOC regardless of Bureau or Custodial Area.

3. Select the **Save** button to save your selection.

Result: Your closed asset requests email notification selections have been saved and a message appears at the top of the screen.



End of activity.

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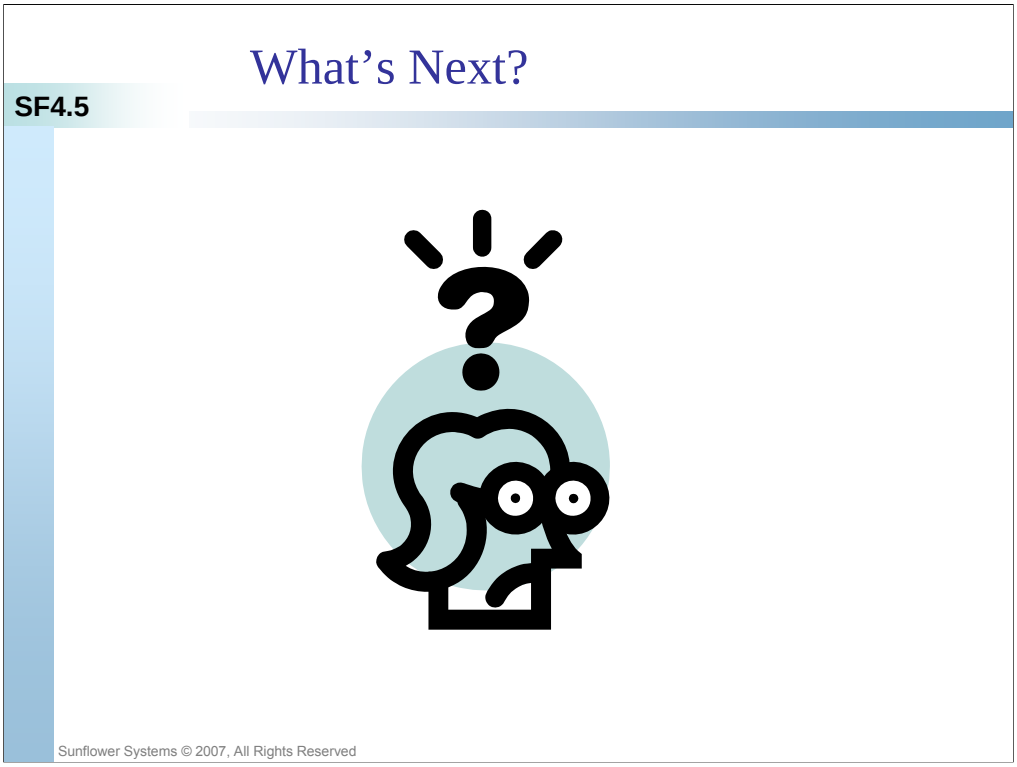

You instructor will review any upcoming significant activities or dates.

Help! Who can answer my questions???!!!!

SF4.5

Sunflower Help Desk

- Phone Number:
- Email:
- Website:

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A Sunflower Help Desk is being created to assist all users with questions. The phone number, email, and website address will be forwarded to you when available.

The help desk will have a maximum **24 hour response time**. Ask your question today, get assistance by the next day.

SF4.5

Types of Requests for the Help Desk

- General How-to questions
- Create People Records and User Requests
- Organization Requests
- Location Requests
- Other Requests

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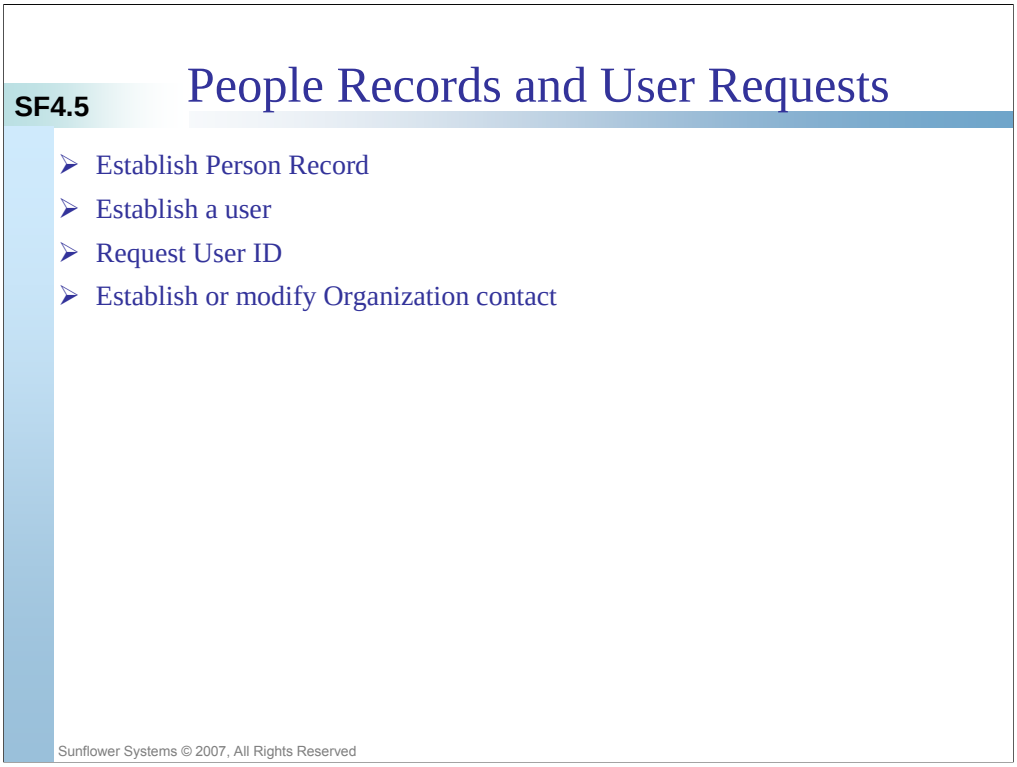
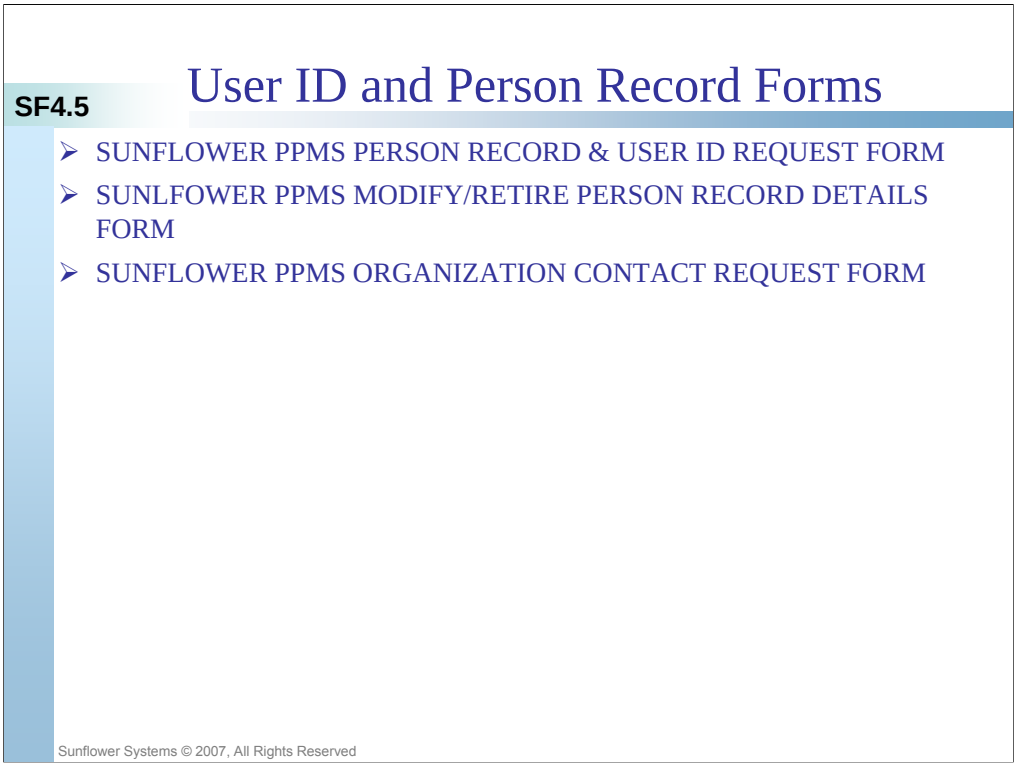
For general how-to questions, the help desk will be able to assist you. For requests to update information in the Sunflower System, users are required to complete a form with more detailed information. (See the following pages.)



Person Record: Sunflower Help Desk will manually maintain the People table. The information in this table allows Sunflower users to be created and anyone listed in this table may be assigned as a user of an asset.

Users: The Sunflower Help Desk will create, modify or delete a user ID for individuals using the Sunflower System. This will establish the roles of a user and assign them to the correct organization. The different roles a user may be assigned include: Administrator, Inventory Clerk, and User.



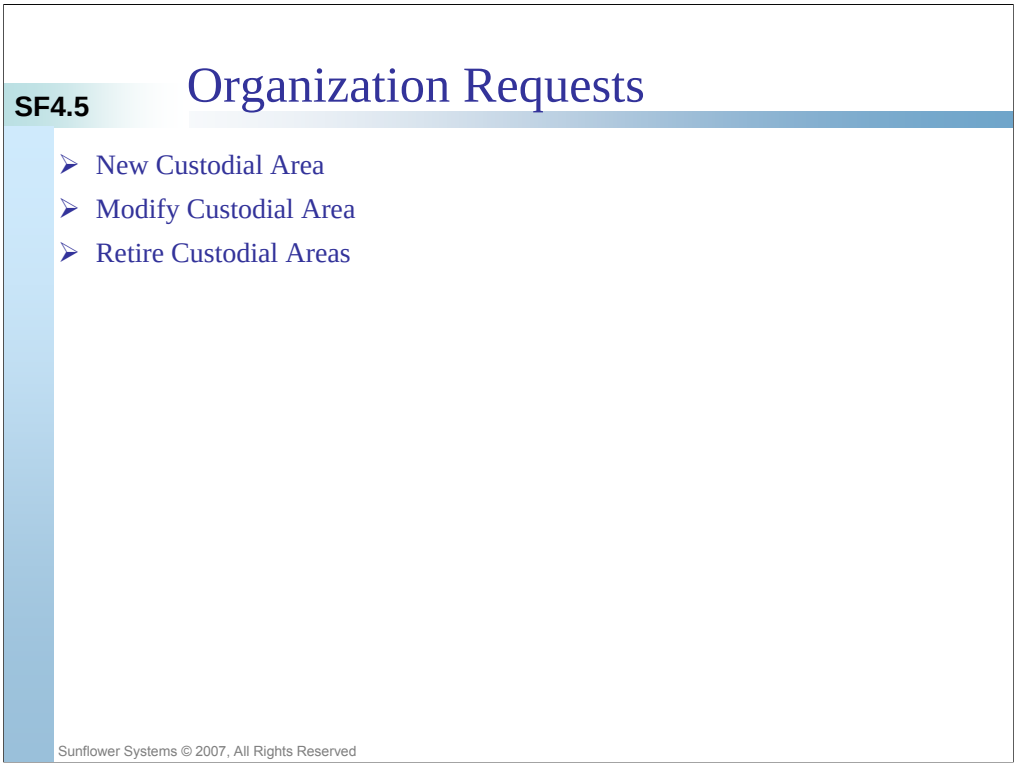
Users will need to complete forms to send to the Sunflower Help Desk when requiring assistance.

SUNFLOWER PPMS PERSON RECORD & USER ID REQUEST FORM – This form is used to add users and assign a user ID to them to allow access to the Sunflower System.

SUNLFOWER PPMS MODIFY/RETIRE PERSON RECORD DETAILS FORM – This form is used to add or remove employees to the Sunflower system. This allows the PC to assign an employee as a user of a piece of property.

SUNFLOWER PPMS ORGANIZATION CONTACT REQUEST FORM – This form is used to add, modify or remove an Organization Contact.

See Appendix for User ID and Person Record Forms.

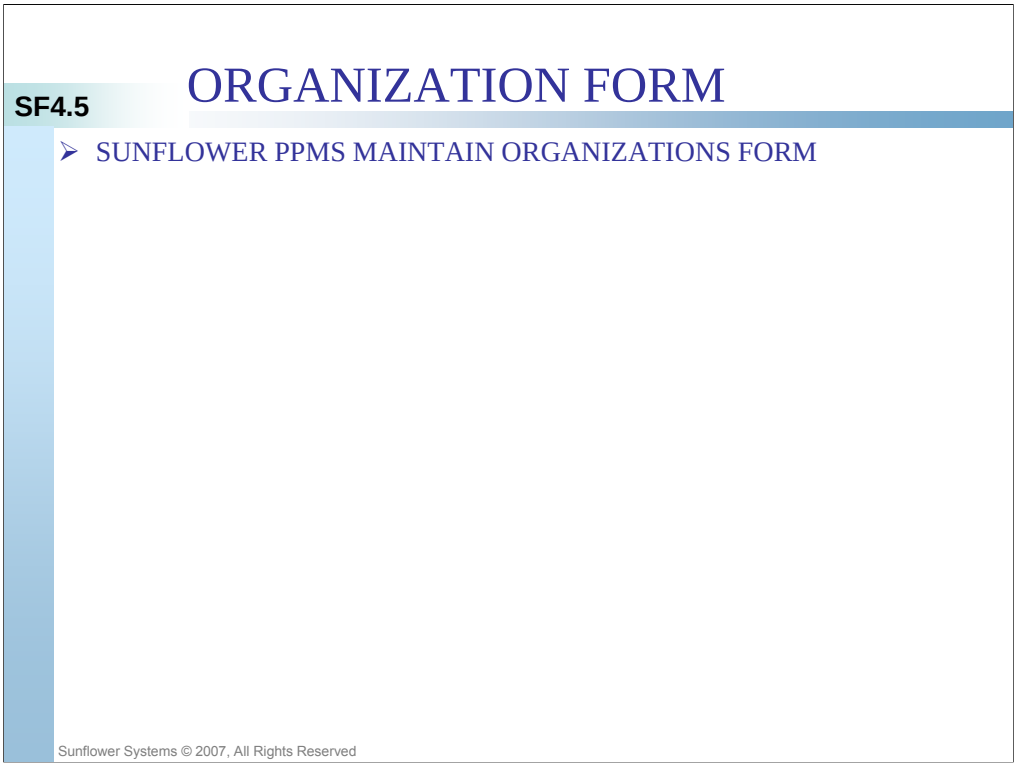


Organizations within the DOC Sunflower instance have been defined to follow the DOC hierarchy. Beneath the department are 13 bureaus. Beneath each bureau is at least one property accountability office. Beneath each property accountability office are multiple custodial areas. Each of these divisions is given an organization value within Sunflower. Each custodial area is then assigned a PC. This establishes the area that a user can transact on property records.

New Custodial Area: Essential information includes the name of the new organization, the parent organization, and the organization contact.

Modify Custodial Area: Generally used when custodial areas are being merged into one or split into at least two areas.

Retire Custodial Area: When no longer using a custodial area, the helpdesk will end date it so the area may no longer be selected. The assets that were previously assigned to this area will maintain that information in its history records.

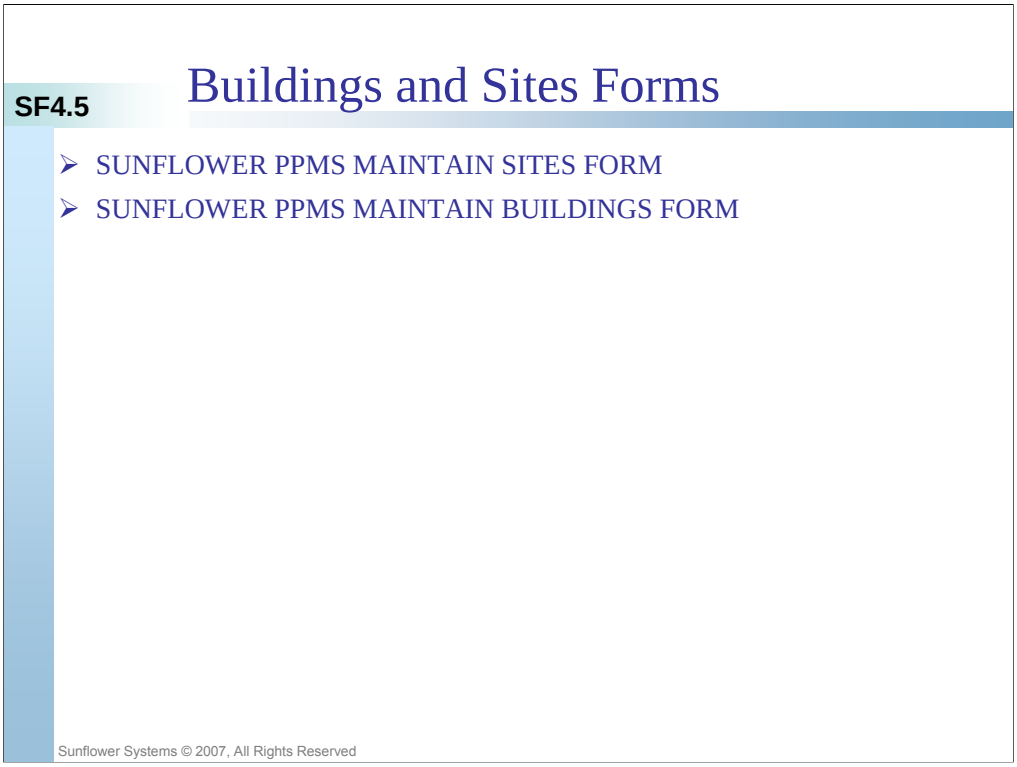


Users will need to complete forms to send to the Sunflower Help Desk when requiring assistance.

The **SUNFLOWER PPMS MAINTAIN ORGANIZATIONS FORM** is used to add, modify or retire an organization from Sunflower. In other words when a new custodial area is created, merged with another or simply removed. The primary property custodian and any secondary custodians for the organization are also added, modified or retired using this form.

See Appendix for Organization Form.

Given the size of the department, it is likely there will be frequent changes to buildings and possibly sites. In order to maintain records that accurately reflect the state of the assets, it is important to update the list of values as quickly as possible when a location is changed.

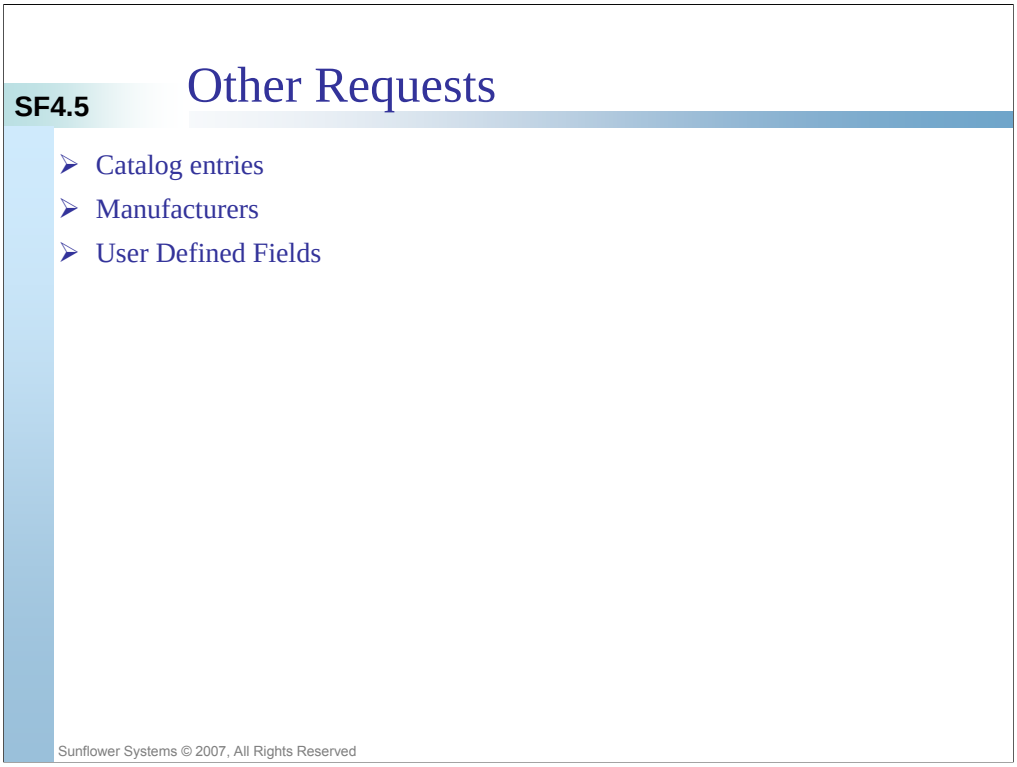


Users will need to complete forms to send to the Sunflower Help Desk when requiring assistance.

SUNFLOWER PPMS MAINTAIN SITES FORM – This form is used to add, modify or retire sites from Sunflower.

SUNFLOWER PPMS MAINTAIN BUILDINGS FORM – This form is used to add, modify or retire buildings from Sunflower.

See Appendix for Buildings and Sites Forms.



There are a number of other values that may require modification in Sunflower. Such fields may include User Defined Fields, manufacturers, and catalog entries, among others. Changes to these lists will most likely be very infrequent. However, these changes can impact all bureaus, and therefore will need universal acceptance.

A Change Management Users Group will be created to discuss modifications to Sunflower that will impact all bureaus. This group will comprise of at least one representative, preferably a PMO or other Subject Matter Expert (SME), from each bureau as well as at least one Sunflower representative. This group will meet to discuss not only requested changes but also any issues or concerns with Sunflower. When a concern is first identified, the concerned party should notify the Helpdesk. The Helpdesk will perform any necessary analysis and provide feedback to the concerned party prior to the next Users Group meeting.

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Business Process Flows

- Acquisition
- Transfers
- Changes and Updates
- Review Campaign – Physical Inventory
- Lost, Damaged, and Destroyed
- Disposal
  - ITA Headquarters
  - ITA Domestic
  - ITA International
- NOAA Excess (FYI only)

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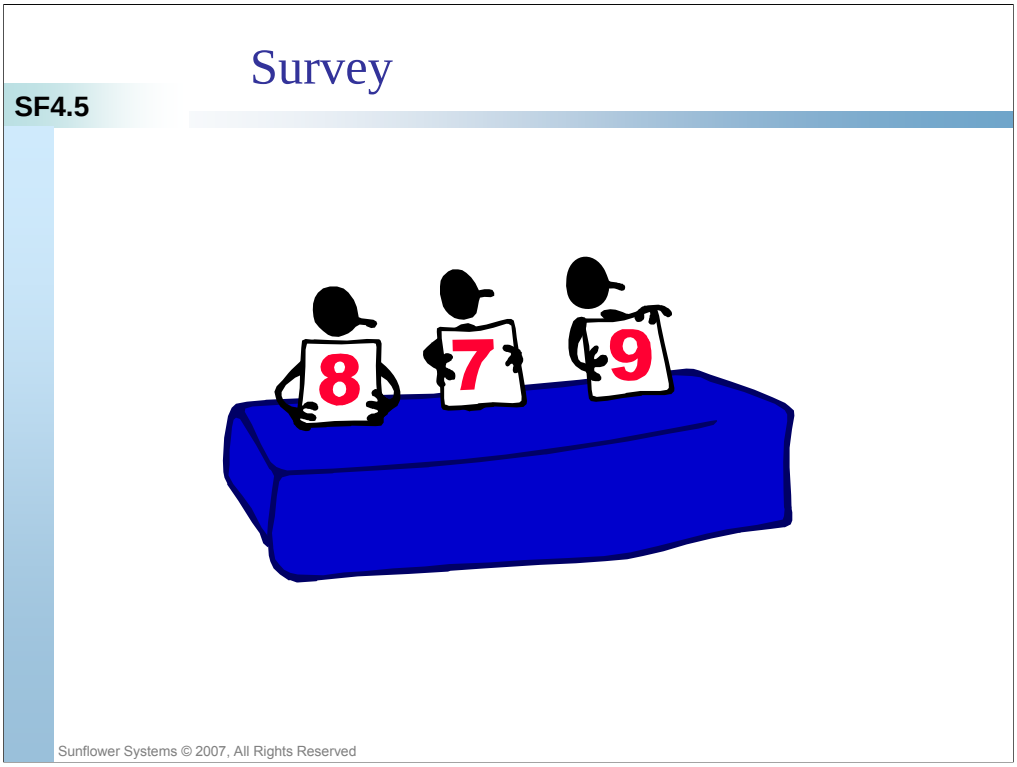
These are provided for your information and all activities relating to the processes are in the student guide in the related chapters.

See Appendix for Business Process Flows.



•Your instructor will provide information about any surveys to be completed for the course.

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Lesson Summary

You should now be able to:

- Set Email Notifications
- Describe help available to users
- Identify forms to complete for help
- Review the business process flows

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Notes:

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Appendix Table of Contents

- Sunflower Systems Icons and Hot Keys Job Aid
- Sunflower System - Asset Creation Job Aid
- User ID and Person Record Forms
- Organization Form
- Buildings and Sites Forms
- Catalog Update Form (coming soon)
- Business Process Flows
  - Acquisition
  - Transfers
  - Changes and Updates
  - Review Campaign – Physical Inventory
  - Lost, Damaged, and Destroyed
  - Disposal
    - ITA Headquarters
    - ITA Domestic
    - ITA International
    - NTIS
  - NOAA Excess (FYI only)

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Sunflower System Icons and Hot Keys

Catalog	
Clear All	
Clear Record	
Comment/Picture/ Attachment	
Display List	
Document	
Edit	
Exit	
Final Event	
Find	

Help	
Initial Event	
Insert Record	
IT Component Summary and History	
Journal Entry	
Location	
Next Block	
Next Record	
Ongoing Event	
Organization	

Person	
Previous Block	
Previous Record	
Print	
Remove Record	
Resolution	
Save	
Summary & History	

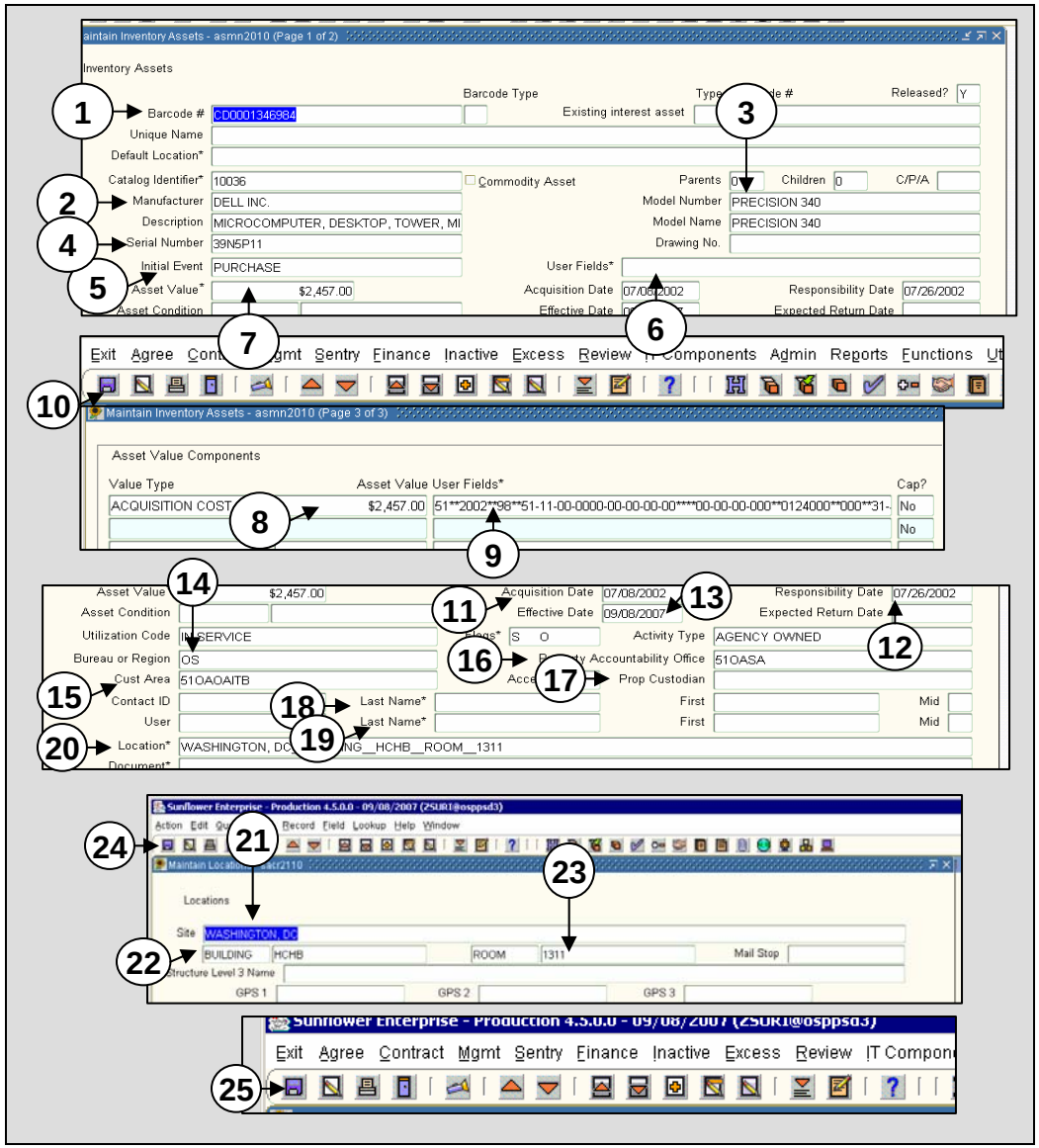
Function	Key
Clear Block	F7
Clear Field	F5
Clear Form	F8
Clear Record	F6
Commit/Save	Ctrl+S
Count Query	F12
Delete Record	Ctrl+Up
Display Error	Shift+Ctrl+E
Duplicate Field	Shift+F5
Duplicate Record	Shift+F6
Edit	Ctrl+E

Function	Key
Enter Query	F11
Execute Query	Ctrl+F11
Exit	F4
Help	Ctrl+H
Insert Record	Ctrl+Down
List of Values	Ctrl+L
List Tab Pages	F2
Next Block	Shift+PageDown
Next Field	Tab
Next Primary Key	Shift+F7
Next Record	Down

Function	Key
Next Set of Records	Shift+F8
Previous Block	Shift+PageUp
Previous Field	Shift+Tab
Previous Record	Up
Print	Ctrl+P
Page Down	Scroll Down
Page Up	Scroll Up
Return	Return
Show Keys	Ctrl+K
Update Record	Ctrl+U
“Copy” / “Paste”	Ctrl+C / Ctrl+V

Sunflower Systems - Asset Creation Job Aid

1. Enter **Barcode Number**
2. Select **Manufacturer**
3. Select **Model**
4. Enter **Serial Number** (if known)
5. Select **Initial Event**
6. Double click **User Fields**, complete and save
7. Double click **Asset Value**
8. Enter **Asset Value Amount**
9. Double click the **User Fields*** and complete as necessary
10. Select **Save**
11. Tab through or update **Acquisition Date**
12. Tab through or update **Responsibility Date**
13. Enter **Effective Date**
14. Enter **Bureau or Region**
15. Enter **Property Accountability Office**
16. Enter **Custodial Area**
17. Enter **Prop Custodian**
18. Select **Contact ID** Last Name, First
19. Select **User** Last Name, First
20. Double click **Location**
21. Select **Site**
22. Select **Building**
23. Select or Type **Room**
24. Select **Save** location
25. Select **Save** asset



For more detailed instructions:

Refer to the NAV: Asset Creation

As of September 2007

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SUNFLOWER PPMS CREATE PERSON RECORD & USER ID REQUEST FORM

*Last Name:	*First Name:
*Bureau:	Location: Site: Bldg: Room#:
Phone Number:	*Email Address:
Begin Date:	End Date:
Property Management Title: Other (required for PMO, PAO, or PC) If other, please specify:	

*=required

For Sunflower Helpdesk Use Only:

Received On:	
Person Identifier Assigned:	User ID Assigned (should be same as Person Identifier):
Completed On:	Replied On:

_____ _____

Requested By Date

SUNLFOWER PPMS MODIFY/RETIRE PERSON RECORD DETAILS FORM

☐ Modify Record

☐ Retire Record

*Person Identifier:	
*Last Name:	*First Name:
*Bureau:	Location: Site: Bldg: Room#:
Phone Number:	*Email Address:
Begin Date:	End Date:

*=required

For Sunflower Helpdesk Use Only:

Received On:	
Completed On:	Replied On:
Note: If End Date is filled out AND End Date is prior to today, then also delete Sunflower User ID.	

_____ _____

Requested By Date

SUNFLOWER PPMS ORGANIZATION CONTACT REQUEST FORM

☐ New Organization Contact
☐ Change Organization Contact
☐ Retire Organization Contact

*Person Identifier OR New Person Request Form Name:	*Organization (Bureau/PAO/PC):
*Property Management Title: Other If other, please specify:	*Primary: Yes
Location: Site: Bldg: Room#:	Replacement PC Identifier (if retiring PC was primary):
Begin Date:	End Date (required if retiring organization contact):

*=required field

For Sunflower Helpdesk Use Only:

Received On:	Replied On:
Completed On:	

_____ _____

Requested By Date

SUNFLOWER PPMS MAINTAIN ORGANIZATIONS FORM

☐ Add Organization

☐ Modify Organization

☐ Retire Organization

*Name of Organization:	Name of New Organization (if modifying name):
*Organization Type:	*Parent Organization:
*Primary Contact:	Alternate Contact (if available):
Begin Date:	End Date (required if retiring organization):

*=required field

For Sunflower Helpdesk Use Only:

Received On:	Code Supplied:
Completed On:	Replied On:

_____ _____

Requested By Date

SUNFLOWER PPMS MAINTAIN SITES FORM

☐ Add Site

☐ Modify Site

☐ Retire Site

*Name of Site:	New Site Name (if modifying name):
Address of Site:	City, State, Zip Code:
Begin Date:	End Date (required if retiring site):

*=required field

For Sunflower Helpdesk Use Only:

Received On:	Code Supplied:
Completed On:	Replied On:

_____ _____

Requested By Date

SUNFLOWER PPMS MAINTAIN BUILDINGS FORM

☐ Add Building

☐ Modify Building

☐ Retire Building

*Name of Building:	New Building Name (if modifying name):
Address of Building:	City, State, Zip Code:
Begin Date:	End Date (required if retiring building):

*=required field

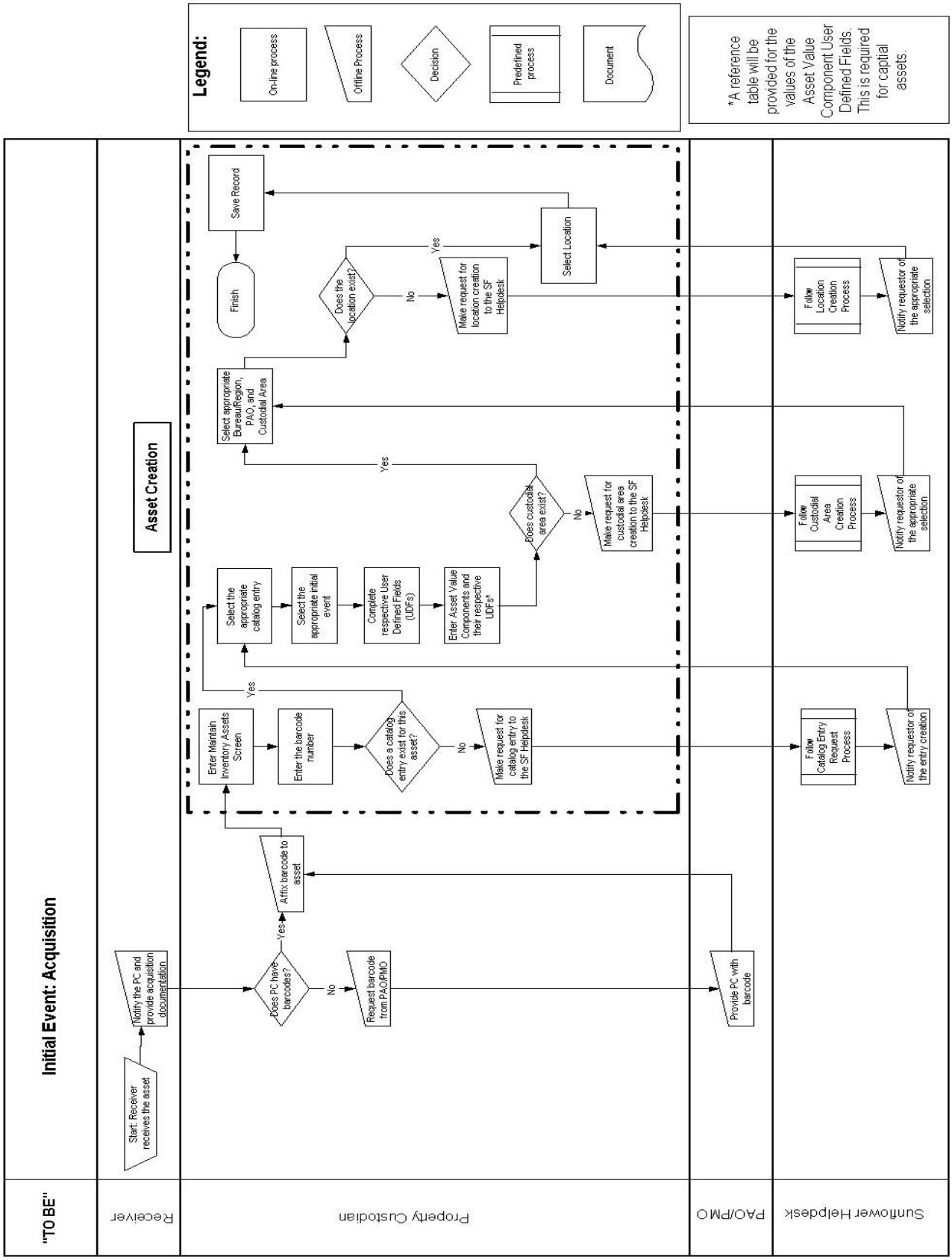
For Sunflower Helpdesk Use Only:

Received On:	Identifier Supplied:
Completed On:	Replied On:

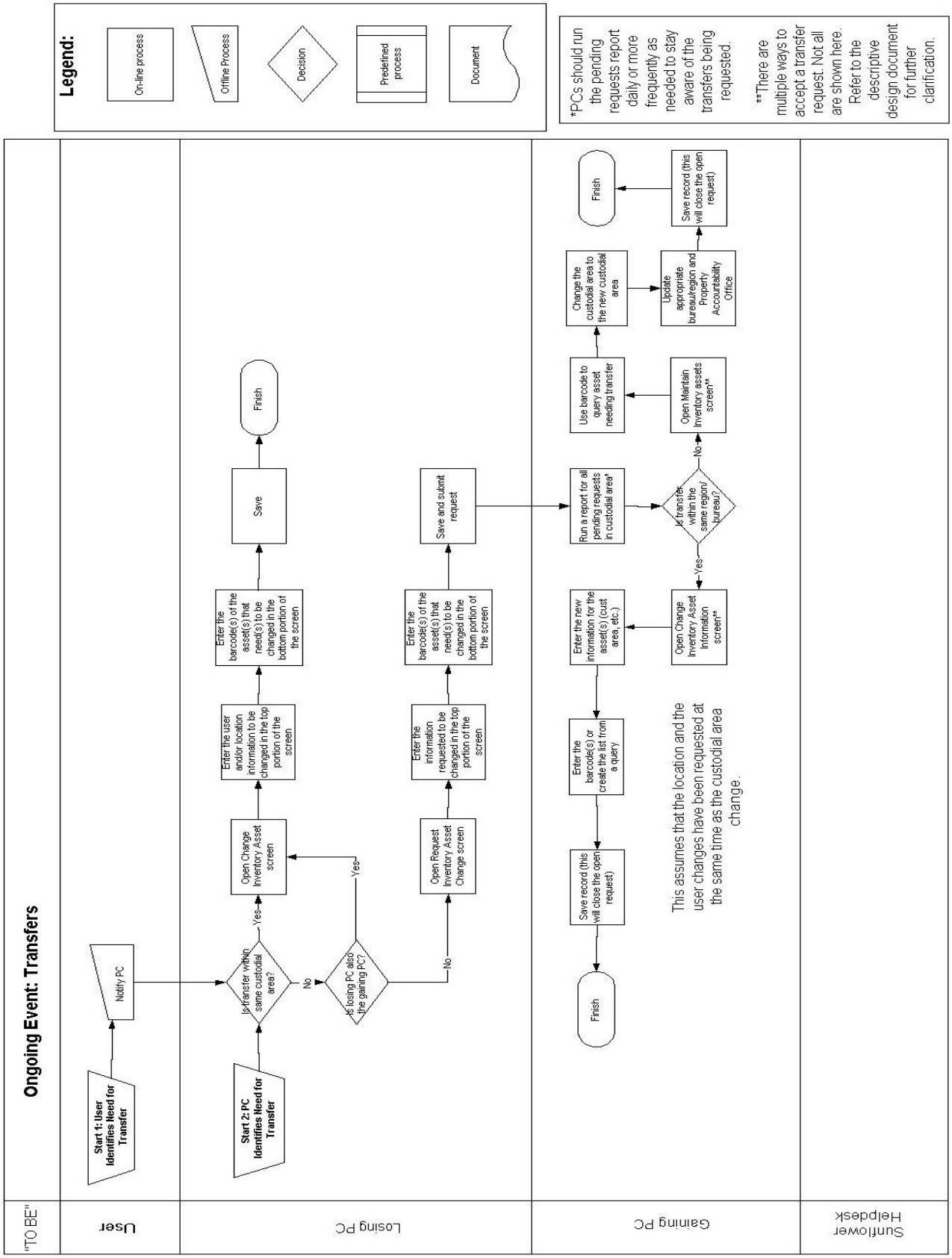
_____ _____

Requested By Date

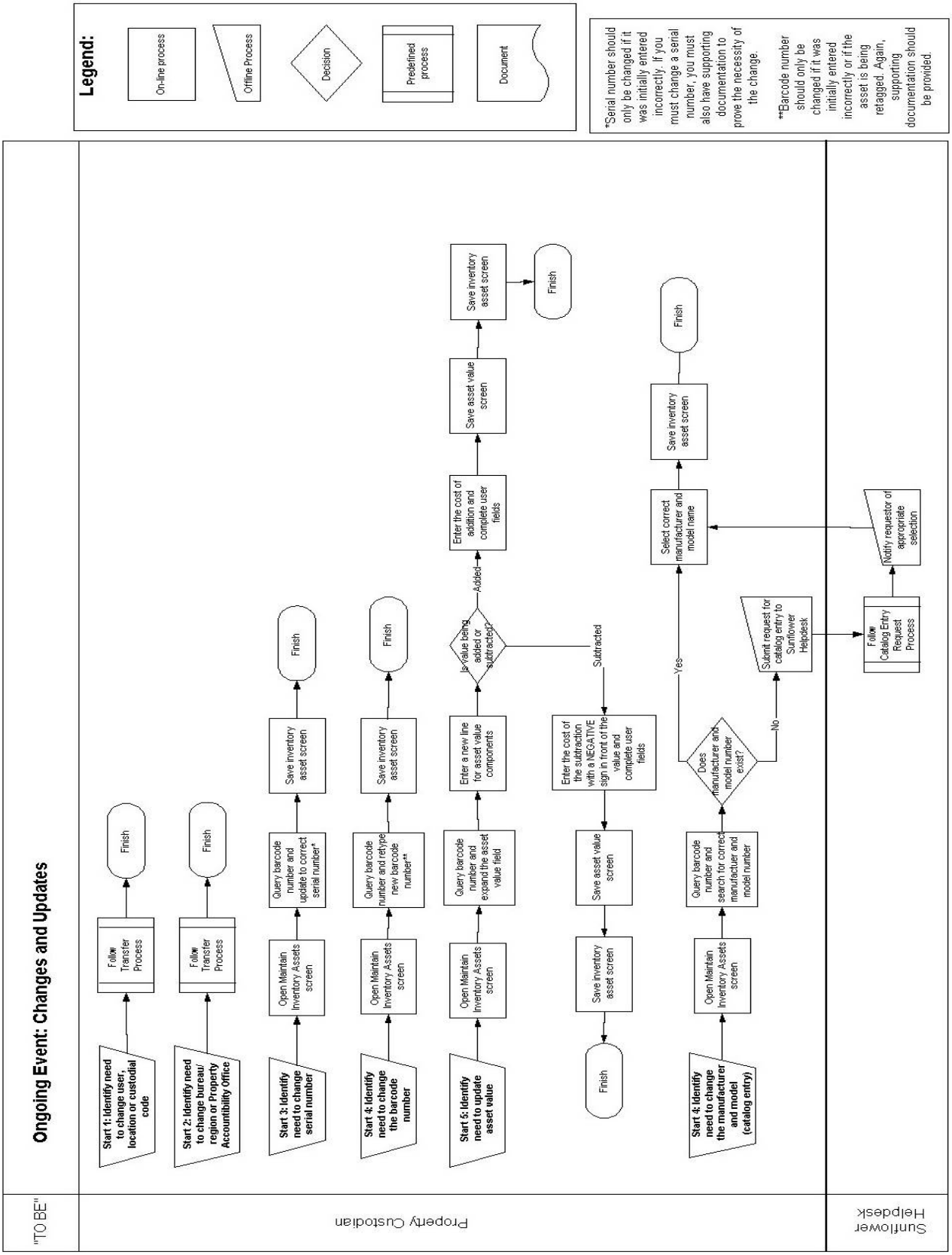
Acquisition Business Process Flow



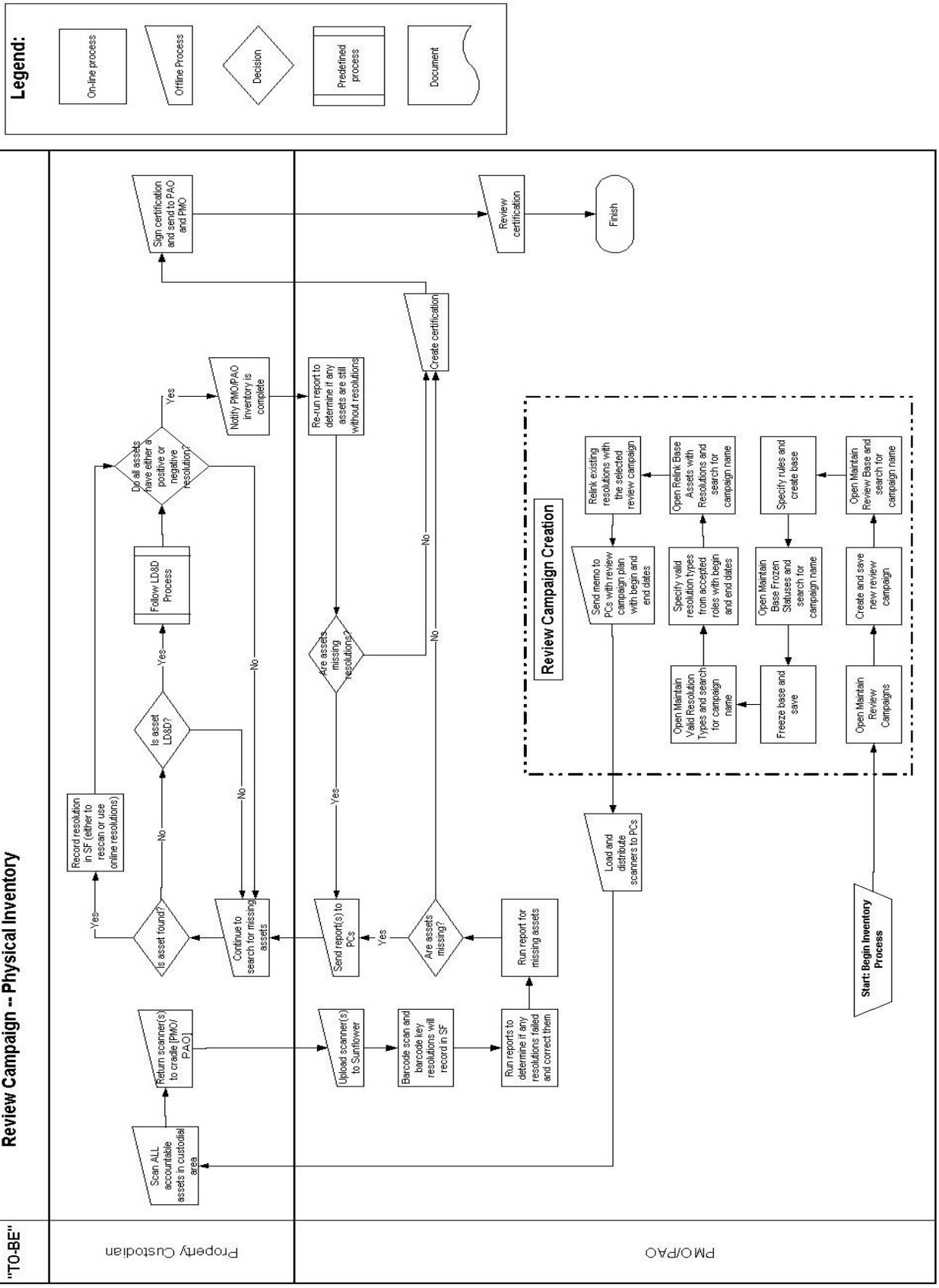
Transfers Business Process Flow



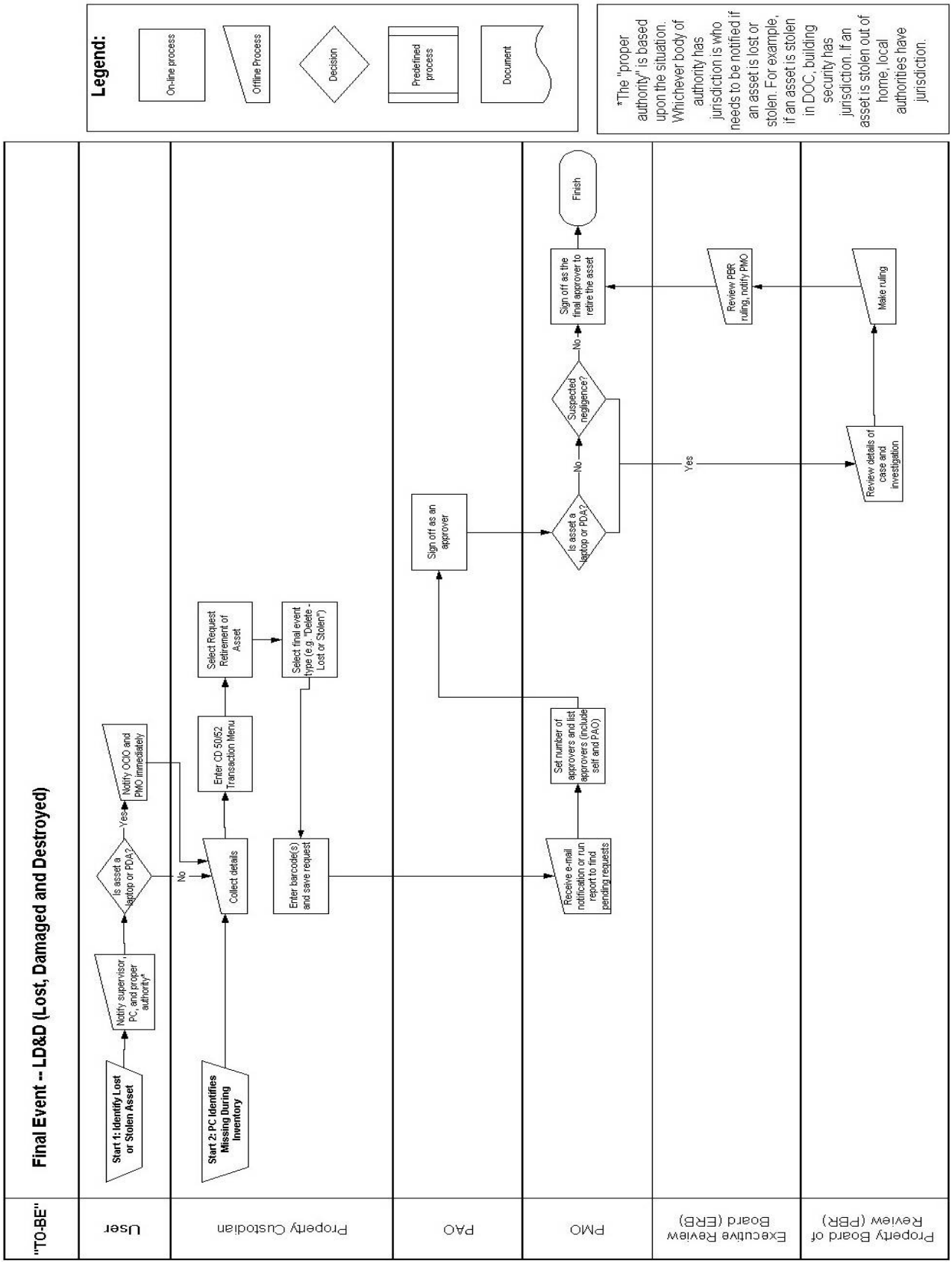
Updates and Changes Business Process Flow



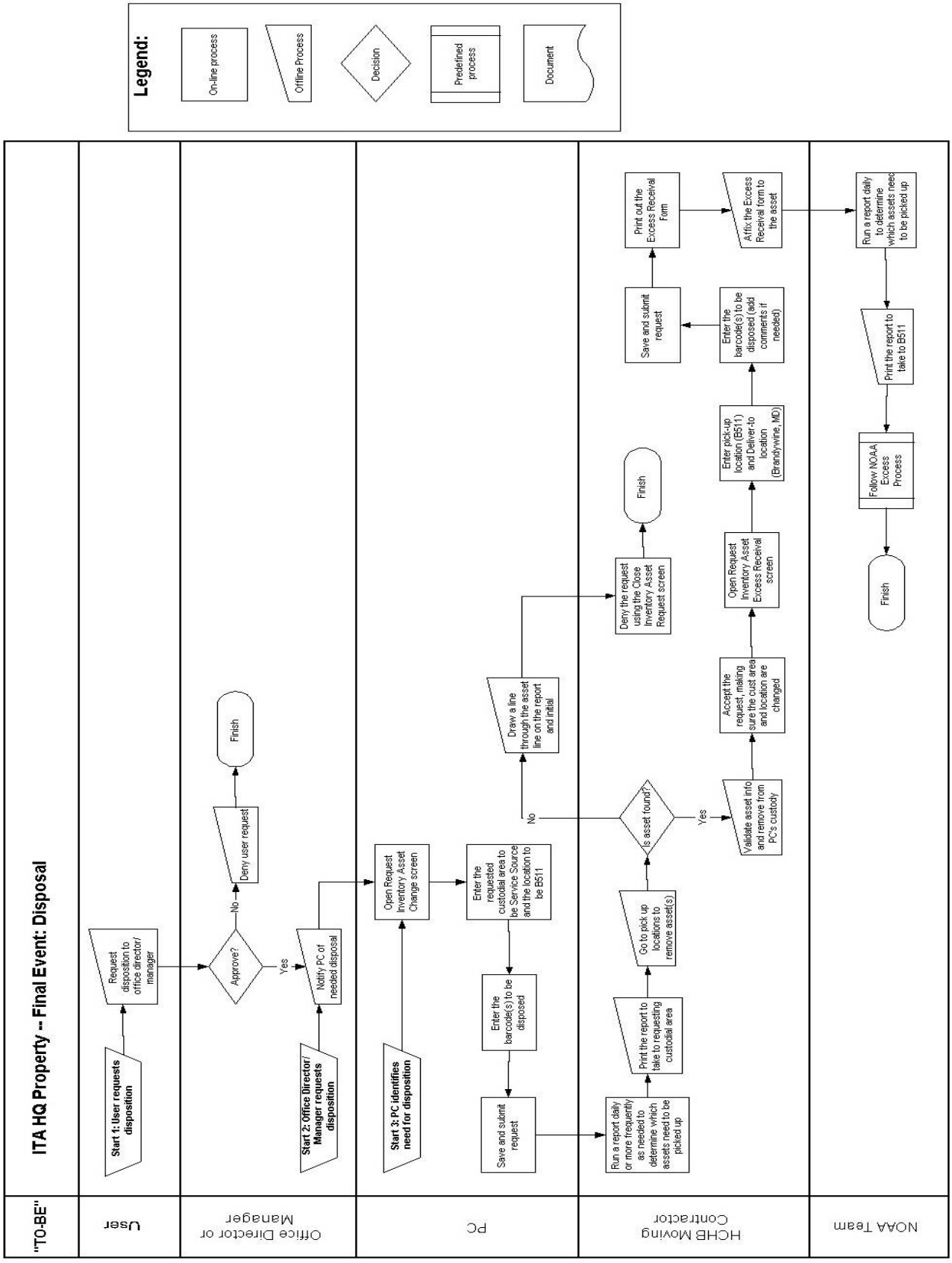
Inventory (Review Campaign) Business Process Flow



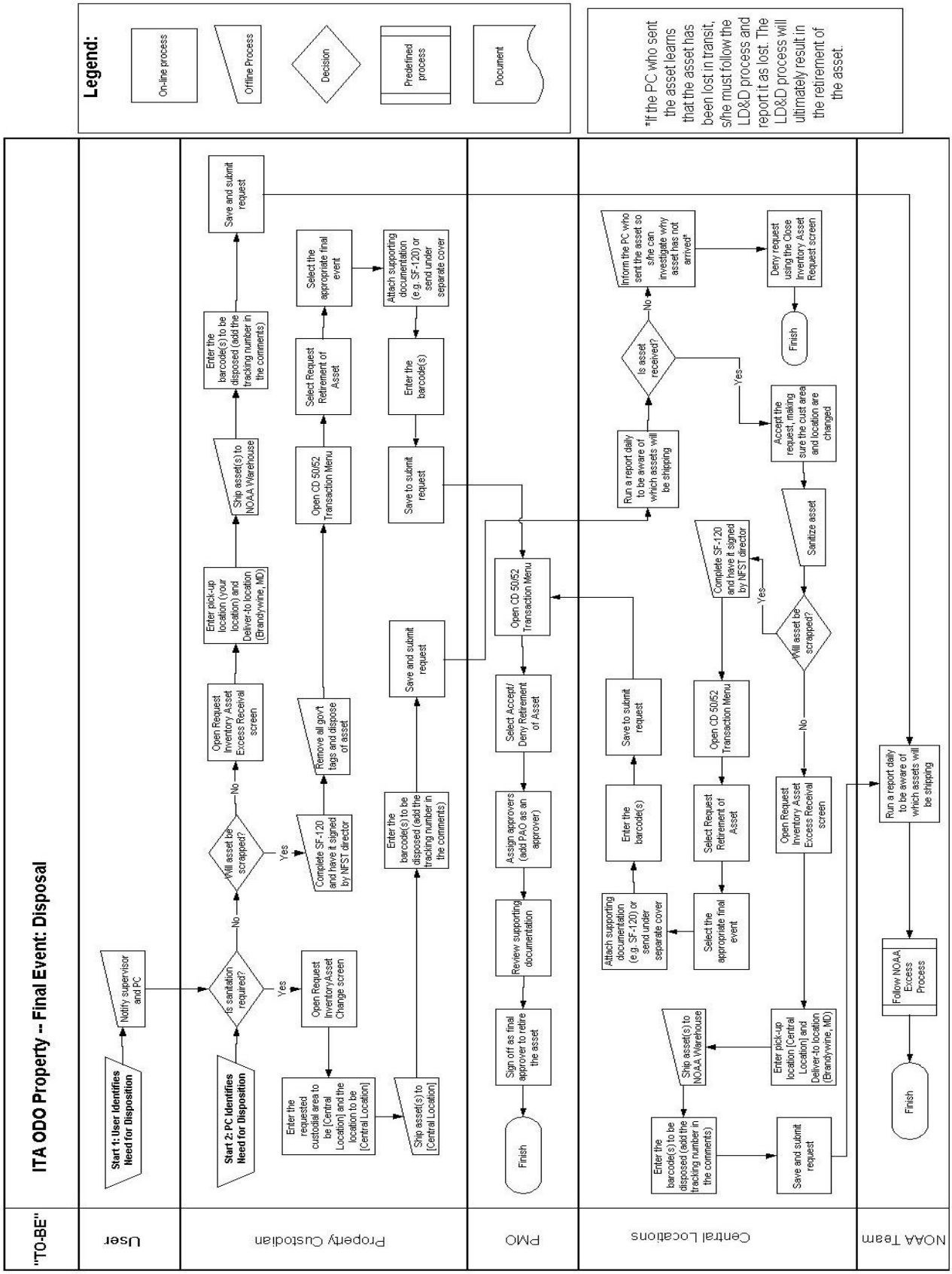
Lost, Damaged & Destroyed (LD&D) Business Process Flow



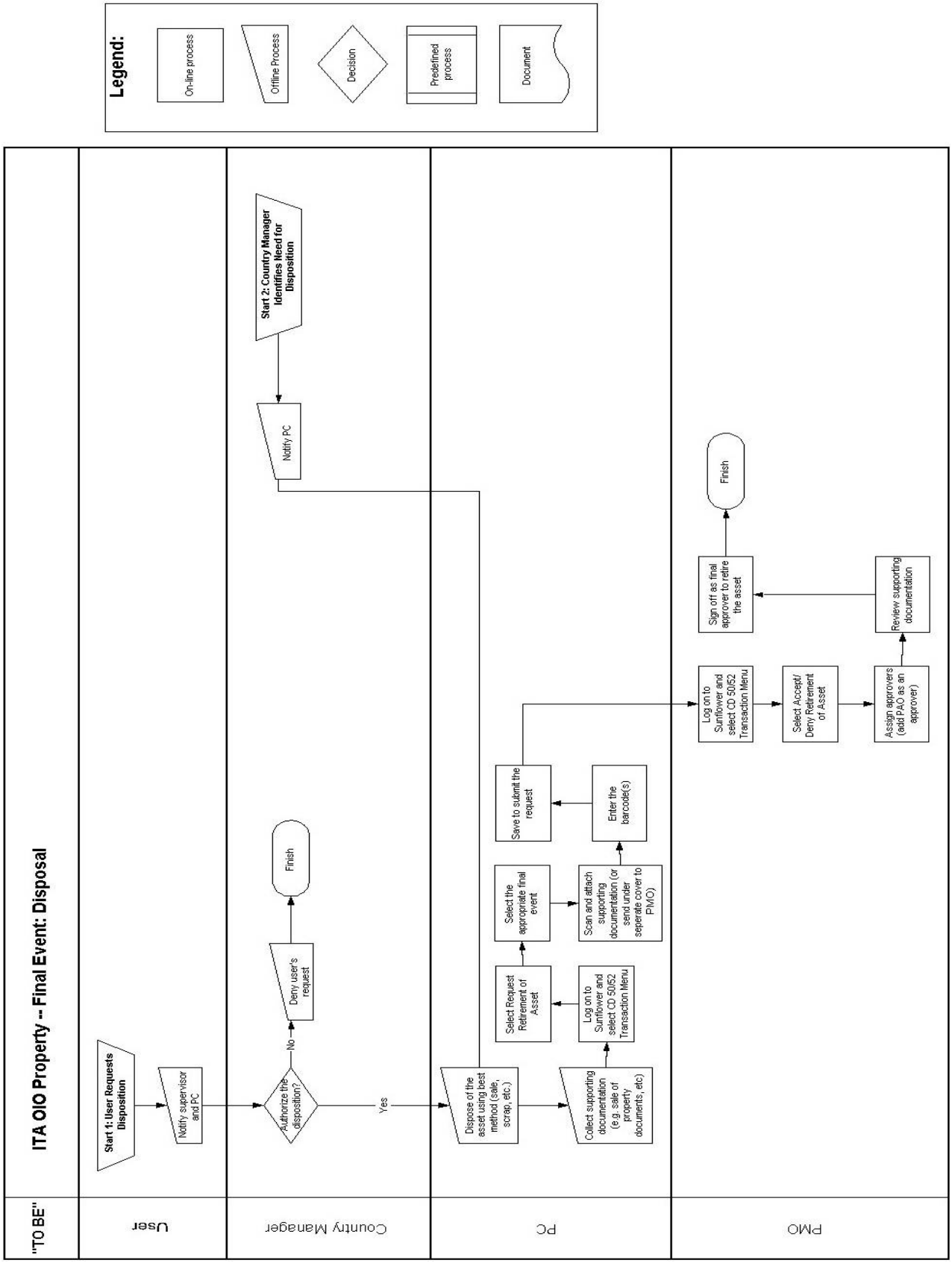
ITA Headquarters Disposal Business Process Flow



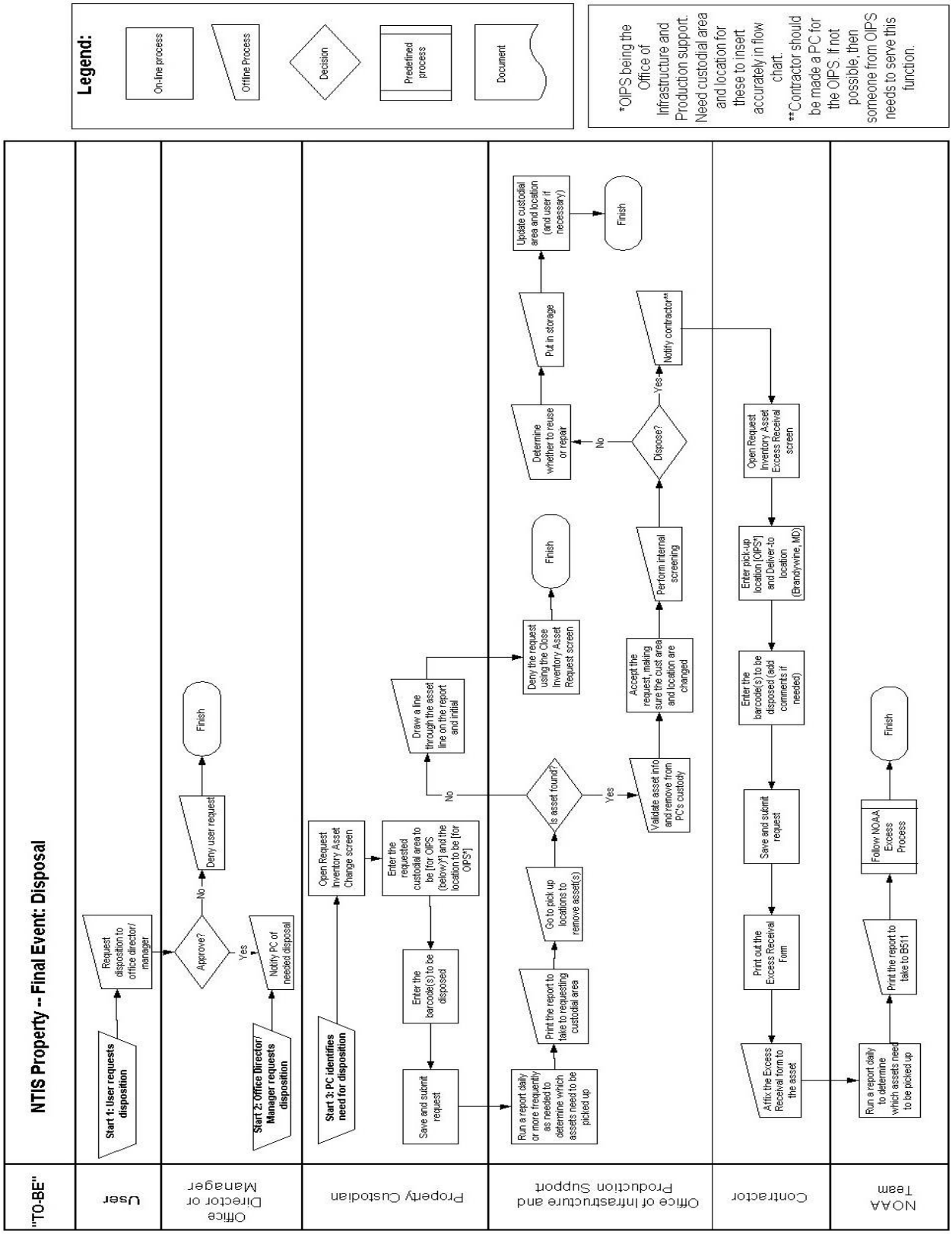
ITA Domestic (ODO) Disposal Business Process Flow



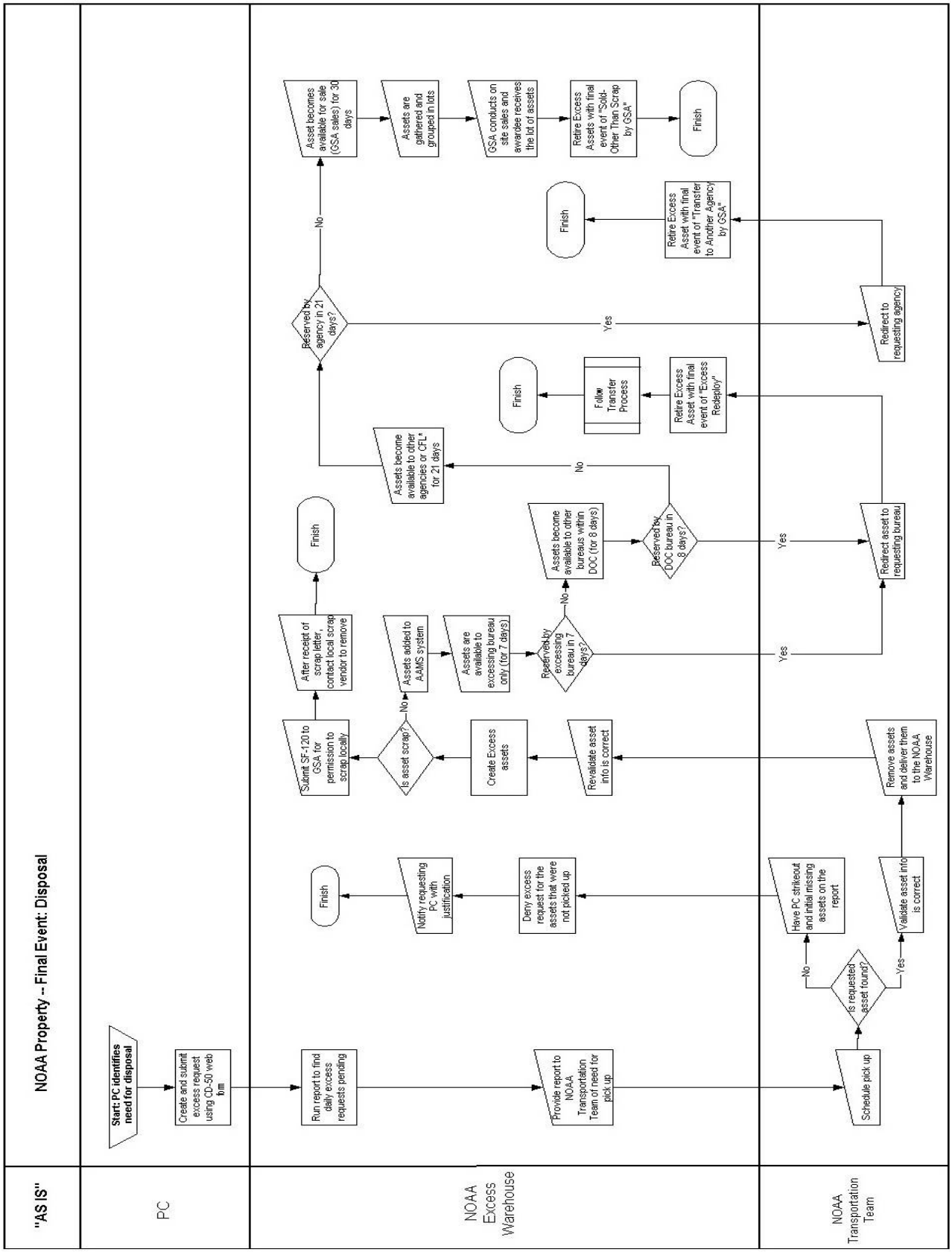
ITA International (OIO) Disposal Business Process Flow



NTIS Disposal Business Process Flow



NOAA Excess Business Process Flow (FYI only)



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