

# Sunflower Assets Basic Terminology

Benjamin F. Folsom III  
Sunflower Systems  
12 June 2007  
Department of Commerce

# Objectives

After this session, you should

- Know more about Sunflower than you do now
- Understand the basic data fields associated to an asset in Sunflower

# Sunflower Terminology & Asset Forms

- Sunflower contains many fields that capture information about property
- Some fields are required, others are not
- Complex fields, identified by an asterisk, have additional data fields that are accessed by double-clicking
- Many fields require users to select data elements from a list of values

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

Identifier	EX101	Type		Existing interest asset		Type	Identifier	Released?	<input checked="" type="checkbox"/>
Default Location*	NASHVILLE__BUILDING__1223__ROOM__6500								
Catalog Identifier*	63	<input type="checkbox"/> Commodity Asset	Parents	0	Children	0	C/P/A		
Manufacturer	HEWLETT PACKARD		Model	NC6000					
Official Name	CPU		Model Name						
Serial Number			Drawing No.						
Initial Event	PURCHASE		User Fields*						
Asset Value*	\$1,500.00		Acquisition Date	05/22/2007	Responsibility Date	05/22/2007			
Asset Condition	1	UNUSED GOOD	Effective Date	05/22/2007	Expected Return Date				
Activity Status	IN SERVICE		Flags*			Activity Type			
Manager	ANNAMS SYSTEMS CORPORATION		Owner	U.S. AIR FORCE					
Steward	NASHVILLE FIELD OFFICE		Accepted?	<input checked="" type="checkbox"/>	Rep	FOSTER GAIL S CBN - 13673			
Custodian		Last Name*	First		Mid				
User		Last Name*	First		Mid				
Location*	NASHVILLE__BUILDING__1223__ROOM__6500								
Document*	FORM DD1149 REQUISITION AND INVOICE/SHIPPING DOCUMENT__1149-101								
User Fields*									
Global User Fields*									

# What Are the Asset Data Categories?

Question	Data Category
How do you identify it?	<b>IDENTIFIERS</b>
What is it?	<b>CATALOG</b>
Where is it?	<b>LOCATION</b>
How did you get it?	<b>INITIAL EVENT</b>
When did you get it?	<b>DATES</b>
Who has it? Who owns it? Who is responsible for it?	<b>ORGANIZATIONS AND PEOPLE</b>
How much did it cost?	<b>ASSET VALUE</b>
What condition is it in?	<b>CONDITION</b>
What is its status?	<b>STATUS</b>
What kind of activity?	<b>ACTIVITY TYPE</b>
What is particular about it?	<b>FLAGS</b>
What document supports it?	<b>DOCUMENT</b>
When did you last “touch” it?	<b>RESOLUTIONS</b>
What did you do to it?	<b>ONGOING EVENTS</b>
How did you dispose of it?	<b>FINAL EVENT</b>

# Identifiers

## How Do You Identify It?

- Use the **Identifier** fields to name the asset
- Fields include:
  - Asset Identifier
  - Serial Number
- Important: The asset Identifier must be unique across the organization

# Catalog

## What Is It?

- Use the **Catalog** fields to indicate what the item is and who made it
- Fields include but are not limited to:
  - ◆ Catalog Identifier
  - ◆ Manufacturer Name
  - ◆ Model Number
  - ◆ Model Name
  - ◆ Official Name
  - ◆ Asset Type
  - ◆ Stock Number
  - ◆ FSC Code
- You must have a catalog entry to create an asset



# Catalog

## What Is It?

- Each asset must be tied to one Catalog entry

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

Identifier	EX101	Type	<input type="checkbox"/>	Existing interest asset	<input type="checkbox"/>	Type	Identifier	Released?	<input type="checkbox"/>
Default Location*	NASHVILLE BUILDING 1223 ROOM 6500								
Catalog Identifier*	63	<input type="checkbox"/> Commodity Asset	Parents	0	Children	0	C/P/A	<input type="checkbox"/>	
Manufacturer	HEWLETT PACKARD	Model	NC6000						
Official Name	CPU	Model Name							
Serial Number		Drawing No.							
Initial Event	PURCHASE	User Fields*							
Asset Value*	\$1,500.00	Acquisition Date	05/22/2007	Responsibility Date	05/22/2007				
Asset Condition	1 UNUSED GOOD	Effective Date	05/22/2007	Expected Return Date					
Activity Status	IN SERVICE	Flags*		Activity Type					
Manager	ANNAMS SYSTEMS CORPORATION			Owner	U.S. AIR FORCE				
Steward	NASHVILLE FIELD OFFICE			Accepted?	Y	Rep	FOSTER GAIL S CBN - 13673		
Custodian		Last Name*		First		Mid			
User		Last Name*		First		Mid			
Location*	NASHVILLE BUILDING 1223 ROOM 6500								
Document*	FORM DD1149 REQUISITION AND INVOICE/SHIPPING DOCUMENT__1149-101								
User Fields*									
Global User Fields*									

# Catalog

## What Is It?

- Sunflower features a centrally managed Catalog
- The Catalog entries consist of the following fields:

- Catalog Identifier
- Manufacturer
- Model Number
- Model Name
- Official Name
- Asset Type

- You must have a Catalog entry to create an asset

Maintain Catalog Entries - asmn0020 (Page 1 of 2)

Catalogs

Identifier  Reviewed?  Y Begin Date  End Date

Manufacturer\*

Model

Official Name

Model Name

Asset Type

Service Life (yrs)  Salvage Value

Override Service Life (yrs)  Override Salvage Value %

Replacement Value

Federal Supply Classification

Stock Number  Unit of Measure

User Fields\*

Comment / Picture / Attachment

- If you know the Catalog Identifier, you can enter the Identifier and the rest of the Catalog information will automatically populate.
- If you do not know the Catalog Identifier, the Manufacturer and Model Number can be used to locate the unique catalog item.

# Locations

## Where Is It Located?

- Use the **Locations** fields to indicate where to find the item
- Fields include:
  - ◆ Site
  - ◆ Structure Level 1 (Building)
    - Type
    - Identifier
  - ◆ Structure Level 2 (Room)
    - Type
    - Identifier
  - ◆ Structure Level 3 (Place)

# Locations

## Site

- Sites are groups of buildings
- Example: A college or university

Site: Sunflower University



# Locations

## Structure Level 1

- Structure Level 1 is a lower level location description. Generally, SL1 is used to identify the building

### Site: Sunflower University



**SL1 Type:** Building  
**SL1 ID:** Computer Science Dept



**SL1 Type:** Building  
**SL1 ID:** Library

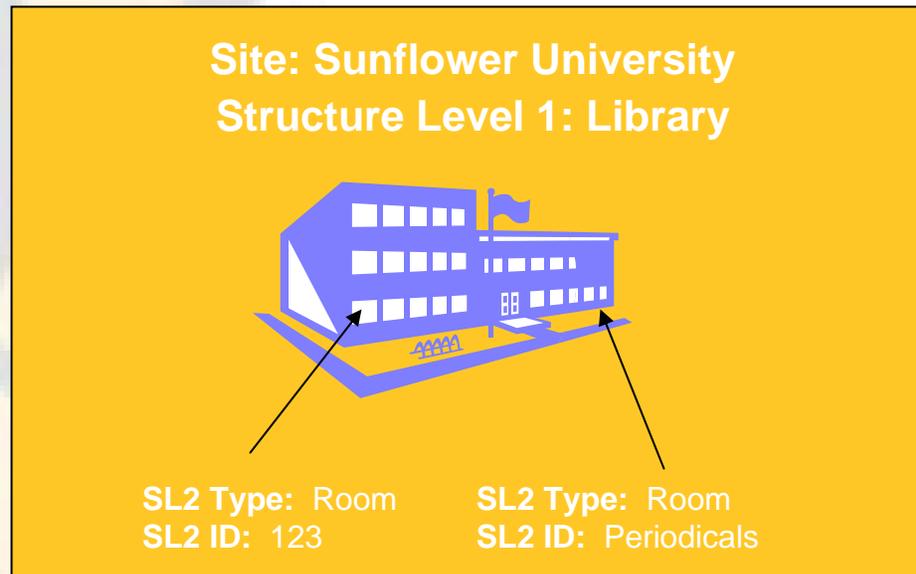


**SL1 Type:** Bus  
**SL1 ID:** 111

# Locations

## Structure Level 2

- Structure Level 2 is a location within Structure Level 1. Most commonly, SL2 is a room.



# Locations

## Structure Level 3

- Structure Level 3 is a free form field that can be used to provide clarification on an asset's location

Site: Sunflower University  
Structure Level 1: Library  
Structure Level 2: Room 123



SL3: Workstation #1      SL3: Workstation #4

The image shows a server rack with two workstations. The workstation on the left is labeled 'SL3: Workstation #1' and the workstation on the right is labeled 'SL3: Workstation #4'. Arrows point from the labels to the respective workstations in the photograph.

# Initial Event

## How Did You Get It?

- Use the **Initial Event** fields to indicate how you acquired the item
- The **Initial Event** information is broken down into two parts:
  - ◆ **Initial Event Type:** How did you get it?
  - ◆ **Initial Event User Fields:** What additional specific information do you have or require to document the acquisition?
- Examples of **Initial Event Types** are:
  - ◆ Purchase Order
  - ◆ Issued
  - ◆ Found on Station

# Dates

## When Did You Get It?

- The **Dates** fields help you to identify critical moments in the asset's lifecycle
- Fields include:
  - ◆ Acquisition Date
  - ◆ Effective Date
  - ◆ Responsibility Date
  - ◆ Expected Return Date



# Organizations and People

Who...?

- Use the **Organizations** and **People** fields to indicate who has a hand in managing the asset or asset record
- Fields include:
  - ♦ Manager: *Organization* that has the overall responsibility for the asset
  - ♦ Owner: *Organization* that has title to the asset
  - ♦ Steward: *Organization* that has day-to-day responsibility for the asset
  - ♦ Custodian: *Person* who has day-to-day responsibility for the asset record
  - ♦ User: *Person* who has day-to-day use of the asset

# Organizations and People

Who...?

<b>ROLE</b>	<b>EXAMPLE</b>
<b>Manager</b>	<b>US Senate</b>
<b>Owner</b>	<b>US Government</b>
<b>Steward</b>	<b>Senator Smith's Office</b>
<b>Custodian</b>	<b>Office Manager John</b>
<b>User</b>	<b>Senator Smith</b>

# Organizations and People

Who...?

- Organization information is entered into a single field in Sunflower
- For each person, the following fields exist:
  - ◆ Identifier: an employee number or other reference number assigned by the HR system
  - ◆ First Name
  - ◆ Last Name
  - ◆ Middle Initial
- If you do not know the identifier of an individual, you can use the person's name to find the identifier

# Asset Value

## What Is Its Value?

- Use the **Asset Value** field to indicate the acquisition cost of the asset
- Can be made up of more than one Asset Value Component
- An example of another Asset Value Component is Installation Cost

Maintain Inventory Assets - asmn2010 (Page 3 of 3)

Asset Value Components

Value Type	Asset Value	User Fields*	Cap?
ACQUISITION COST	\$1,000.00	101-101__TAPE	No
INSTALLATION COST	\$500.00		No

# Status

## What Is Its Status?

- Use the **Condition** fields to indicate the condition of the asset.
- Is the asset new? Used? In good condition?
- Fields include:
  - Condition Code
  - Condition Description

# Status

## What Is Its Status?

- Use the **Status** field to indicate how the asset is currently being used
- Fields include:
  - ♦ Activity Status: Is it in service? Is it inactive? Is it excess property?

# Activity Type

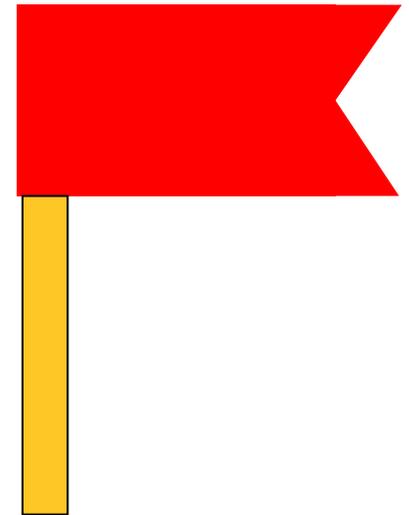
What is its type of activity?

- Use this to determine what or which type of activity the asset will support
- Examples: Assigned to Lab, Field Use, International Deployment
- This specific list of values will be determined by the customer based on business practices

# Flags

## What Is Particular About It?

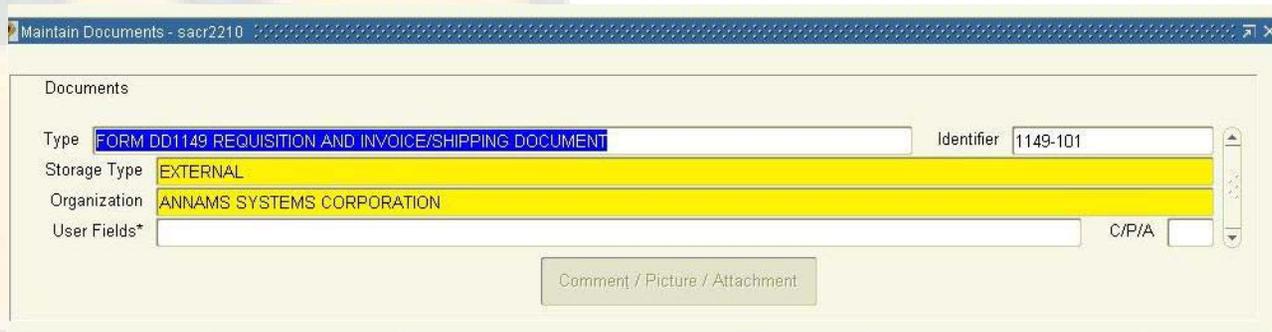
- Use the **Flag** fields to indicate special attributes of the asset
- These attributes are organization-specific and will be based upon specific business practices
- Can be used to indicate an asset that is
  - ◆ Portable
  - ◆ Sensitive
  - ◆ Hazardous



# Document

## How Did You Receive It?

- The document field is used to associate a form, letter, invoice or other document that supports the asset record
- Fields include
  - ◆ Type (Transfer Request, Purchase Order, Packing Slip, etc)
  - ◆ Identifier (the unique name of the document)
  - ◆ Storage Type (internal or external)
  - ◆ Organization (responsible for managing the document)



The screenshot shows a software window titled "Maintain Documents - sacr2210". The window contains a form with the following fields:

Documents	
Type	FORM DD1149 REQUISITION AND INVOICE/SHIPPING DOCUMENT
Identifier	1149-101
Storage Type	EXTERNAL
Organization	ANNAMS SYSTEMS CORPORATION
User Fields*	<input type="text"/> C/P/A <input type="checkbox"/>

At the bottom of the form, there is a button labeled "Comment / Picture / Attachment".

# Resolutions

## When Did You Last Touch It?

- Use **Resolutions** to record information related to the last time the item was verified (i.e., last physical inventory information)
- Fields include:
  - ◆ Type
  - ◆ Location
  - ◆ Person

Resolutions

Type: ONLINE PHYSICAL  Update Location?

Location\*: NASHVILLE\_BUILDING\_1223\_ROOM\_6500

Recorded By: HMCMICHAEL Last Name\*: MCMICHAEL First: HOPE Mid:

Assets

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	EX101	HEWLETT PACKARD	NC6000	CPU
<input type="checkbox"/>				

Message: ORA-04062: signature of package "SNFLWR\_REPOS.AS\_RESOLUTION" has been changed

# Ongoing Events

What did you do to it?

- Ongoing Events record actions that are taken against an asset during its lifetime. Sample Ongoing Events include:
  - ◆ Change of Location
  - ◆ Change of User
  - ◆ Change of Custodian
  - ◆ Calibration
  - ◆ Preventive Maintenance
  - ◆ Capital Rehabilitation
- Fields include:
  - ◆ Ongoing Event Type: What did you do to the item?
  - ◆ Ongoing Event Date: When did you do it?
  - ◆ Ongoing Event User Fields: Additional information
- Many Ongoing Events are generated automatically in Sunflower

# Final Events

## How Do You Dispose Of It?

- Use **Final Events** to indicate how the organization retired the asset
- Fields include:
  - ◆ Final Event Type: How did you dispose of the item?
  - ◆ Final Event Date: When did you dispose of the item?
  - ◆ Final Event Document: How is it documented?
  - ◆ Final Event User Fields: Additional information

# Final Events

## How Do You Dispose Of It?

- Final Event Type:
  - ◆ Select the appropriate Final Event Type from the list
- Final Event Date:
  - ◆ Enter the date of the disposal in the Final Event Date field into Sunflower
- Examples of Final Events include:
  - ◆ Donated
  - ◆ Lost, Damaged or Destroyed
  - ◆ Obsolete
  - ◆ Traded In

# Final Events

## How Do You Dispose Of It?

- Final Event Documents:
  - ♦ Although the document fields are not required, many organizations use them to store pertinent information:
    - n Document Number: What document number supports the disposal
    - n Document Type: What document type supports the disposal
    - n Document Organization: What organization controls the document
    - n Storage Location: Where the document is stored
  - ♦ For some final event types, additional information is required for the final event

# Quick Summary of Sunflower Asset Fields

Agreement Asset Summary and History - asmn2055 (Page 1 of 3)

Assets Identifier Type Parents  Children  C/A/P

Identifier Asset Identifier (Barcode/Tag) Current Identifier

Unique Identifier

Summary And History Timeline

Include history

Manufacturer	Manufacturer of Asset	Model	Manufacturer Model Number
Official Name	Description of Asset – Laptop, Printer	Model Name	Manufacturer Model Name
Serial Number	Asset Serial Number	Drawing No	
Initial Event	How you acquired the asset	User Fields*	Acquisition Details - document supporting acquisition
Final Event	How you disposed of the asset	User Fields*	Disposition Details- document supporting disposition
Asset Value*	Actual or Estimated Cost of Asset	Acquisition Date	PO Date      Responsibility Date      Receipt Date
Asset Condition	Condition of Asset	Effective Date	Record Effective Date      Expected Return Date
Act Status/Type	Asset Status – In Service, Excess, Inactive	Flags	Activity Type      Type of Activity Supported
Manager	Org having global responsibility for asset	Owner	Org having title to asset
Steward	Org having day-to-day responsibility for asset	Rep	Person responsible for Steward Org
Custodian	Person having day-to-day responsibility for asset record		
User	Person having day-to-day use of the asset		
Location*	Actual Location of Asset – Site, Building Number, Room Number		
Document*	Document information of supporting documentation for latest asset action		
User Fields*	Additional Asset Information		
Global User Fields*	Additional Asset Information		

Creator Information      Interest Details



**Sunflower**Systems

A large, faint, stylized sunflower graphic in the background, with a dark center and yellow petals, partially overlapping the text.

**Sunflower**Enterprise