



# AGREEMENTS

**T**he *Agreements* module enables users to manage the assets assigned to Agreements, (e.g. leases, warranties) between the organization and external organizations.

Users can also create intra-organizational Agreements and track the activity status of each asset associated with an Agreement using an extensive menu of reporting functions. This chapter places strong emphasis on the setup of Agreements and Agreement assets for the on-going management of assets with contractual ties.

## KEY CONCEPTS

This chapter will include the following discussion points and concepts:

- About Agreements and Agreement Assets
- Agreement Roles
- Agreement Setup
- Create Agreements
- Create Agreement Assets
- Maintain Agreement Assets
- Maintain Agreements
- Retiring Agreement Assets
- Working with Inactive Module
- Working with Excess Module
- Edit Agreement Asset Interface Records

- Agreement Reports

## ABOUT AGREEMENTS AND AGREEMENT ASSETS

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One of the important tasks related to asset management is managing assets that are associated to an agreement. Through the Agreements (Agree) Module, Sunflower enables users to record the creation and capture the events of an Agreement asset throughout its lifecycle. From creation to retirement of an Agreement asset, users can easily manage and oversee the organization's vast and diverse asset base.

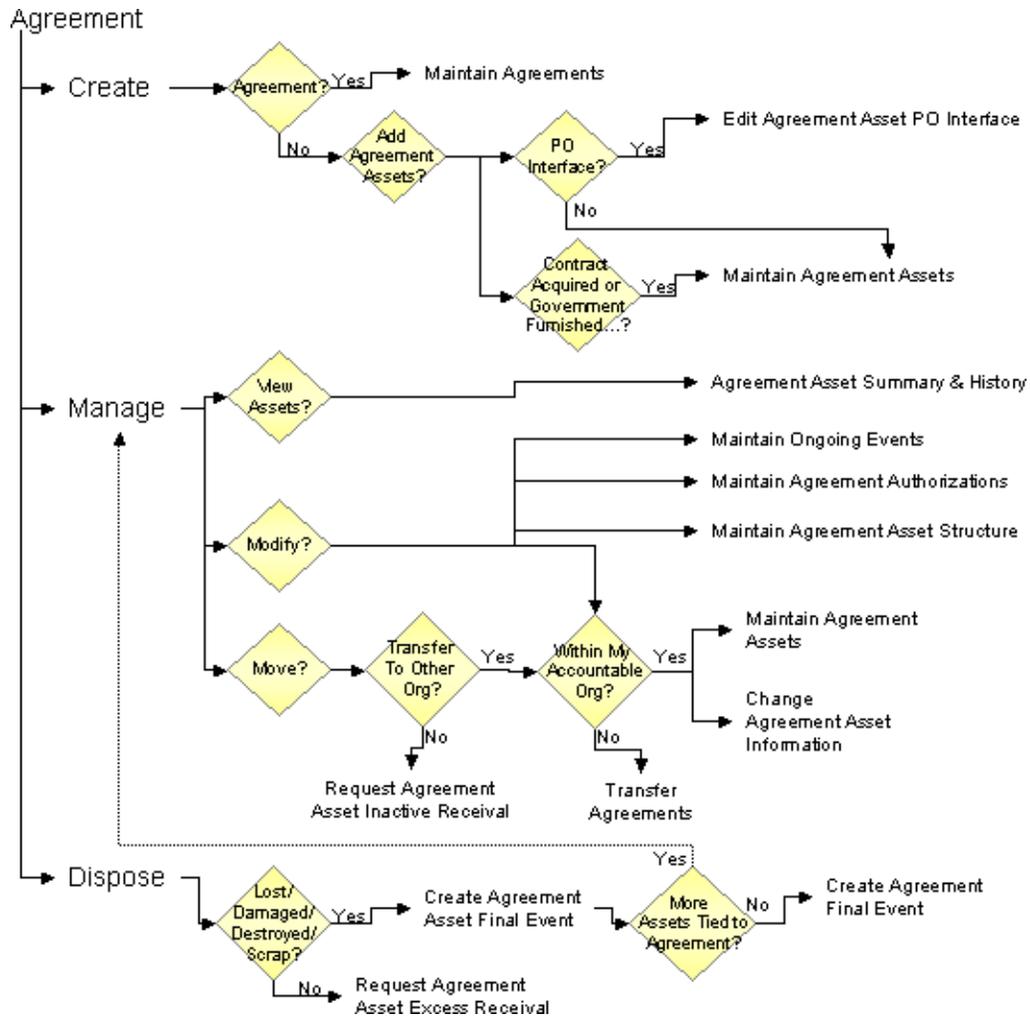
The Sunflower Agreement module captures information needed by asset managers during the initial phases of an Agreement by tracking and tagging assets as they become associated with an Agreement. Users can associate assets to Agreements such as a property pass, warranty, or lease as well as move, transfer or dispose of a group of assets at the Agreement level. In addition, the Agreements module supports the reporting of asset activity for standard government reports (refer to the Sunflower Contract Reports User Guide for more information about government reporting). The Agreements module manages assets associated with both formal and informal contracts that can include:

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

The following sections discuss and illustrate Sunflower Assets Agreements module.

## AGREEMENT MODULE WORKFLOW

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



## AGREEMENT ROLES

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

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

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

Whether the organization chooses to assign a user as a manager or a clerk will depend upon the limitations that one wishes to impose on that user. For example, the organization may choose to assign one user who is only responsible for specific Agreements, whether in quantity or type, a limited role (e.g. Agreement Clerk) within the application versus another user who has a greater level of responsibility and who manages all Agreements within the system (e.g. Agreement Manager).

**Agreement Managers:** Can manage and modify all Agreement and all Agreement assets

**Agreement Clerks:** Can manage and modify Agreements (and associated assets) only on which the clerk is authorized to transact and asset associated to those Agreements.

## AGREEMENT AND CONTRACT MENU ACCESS

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

MENU ITEM	ROLE	
	AGREEMENT MANAGER	AGREEMENT CLERK
<b>Maintain Agreement Assets</b>	Yes	Yes
<b>Agreement Asset Summary and History</b>	Yes	Yes
<b>Manage Material</b>	Yes	Yes
<b>Asset Search</b>	Yes	Yes
<b>Material Search</b>	Yes	Yes
<b>Maintain Catalog Entries</b>	--	--
<b>Transfer Agreements</b>	Yes	Yes
<b>Transfer Agreements Asset Value</b>	Yes	Yes
<b>Maintain Agreement Asset Ongoing Events</b>	Yes	Yes
<b>Create Agreement Asset Final Events</b>	Yes	Yes
<b>Edit Agreement Asset Interface Records</b>	Yes	Yes
<b>Edit Material Asset Interface Records</b>	Yes	Yes
<b>Process Agreement Asset Interface Records</b>	Yes	Yes
<b>Process Agreement Asset PO Interface Records</b>	Yes	Yes
<b>Edit Asset Value Component Interface Records</b>	Yes	Yes
<b>Maintain Agreements</b>	Yes	Yes
<b>Maintain Agreement Authorizations</b>	Yes	--
<b>Maintain Agreement Business Events</b>	Yes	Yes
<b>Change Agreement Asset Information</b>	Yes	Yes
<b>Request Agreement Asset Change</b>	Yes	Yes
<b>Close Agreement Asset Requests</b>	Yes	Yes
<b>Maintain Asset Structures</b>	Yes	Yes
<b>Search Map</b>	Yes	Yes
<b>Agreement Reports</b>	Yes	Yes

In addition, the Agreement Manager has access to several Administration module screens that are necessary for the setup up of the Agreement module to manage and report on assets according to the organization's business processes. These will be discussed in the Agreements Setup section of this chapter.

## AGREEMENT MANAGER AND AGREEMENT CLERK

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

In addition to the access granted by Sunflower user roles, the **Maintain Agreement Authorizations** screen enables users to specify an Agreement Clerk's access to specific agreements or agreement types.

## AGREEMENT MANAGER

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

- Create Agreement Types
- Create Sources for Agreement Assets
- Create Classifications for Agreement Assets
- Create and Modify Agreements
- Create and Modify Agreement Assets
- Authorize Users to transact on Agreement

## AGREEMENT CLERK

The **Agreement Clerk** can only create and modify Agreements on which the clerk is authorized and can only create or modify assets associated to those Agreements.

## AGREEMENT SETUP

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The Agreement module requires the following setup before Agreements or Agreement assets can be created:

- Create Agreement Types
- Create Agreement Asset Sources
- Create Agreement Classifications
- Create Valid Agreement Asset Classifications
- Create Agreements
- Create Authorized users

If working with Sunflower Contract Reports in conjunction with the Agreement Module, there are additional setup steps required. For more information on the setup required for using Sunflower Contract Reports, refer to the Contract Reports Administration Guide.

### CREATE AGREEMENT TYPES

Before creating Agreements, the organization must setup the supporting infrastructure that the Agreements will use going forward. Agreement Types are set up in the Administration module under Maintain Domains. In order to create Agreements and associate assets to those Agreements, the organization must first define Agreement Types. Common Agreement Types are Leases, Warranties, Property Passes, or Software Agreements.





**Step 5.** Enter a date that an Agreement asset source becomes active in the **Begin Date** field.

**NOTE:** Providing a **Begin Date** is optional. If the Agreement asset source is always valid, leave this field blank.

**Step 6.** Enter a date that an Agreement asset source becomes inactive in the **End Date** field.

**NOTE:** Providing an **End Date** is optional. If the Agreement asset source is always valid, leave this field blank.

**Step 7.** Click the **Save** icon to save the Agreement asset sources.



NOTE: Providing an **End Date** is optional. If the Agreement asset classification is always valid, leave this field blank.

[Step 6](#). Click the **Save** icon.

## MAINTAIN VALID AGREEMENT ASSET CLASSIFICATIONS

After defining Agreement asset classifications, Agreement asset classifications must be assigned (mapped) to Agreement types on which they will be valid. The **Maintain Valid Agreement Asset Classifications** screen enables users to make these assignments. This mapping of Agreement asset classifications to Agreement types limits choices to those creating Agreement assets.

Scenario: The following graphic illustrates how to assign valid Agreement asset classifications to an Agreement type.

### NAVIGATION

- Click Admin
- Click Domain
- Click Maintain Valid Agreement Asset Classifications

Code	Description	Begin Date	End Date
LT LEASE	LONG TERM LEASE		
LTO	LEASE TO OWN		
OWNED	ORGANIZATION OWNED		

**Step 1.** Navigate to the **Maintain Valid Agreement Asset Classifications** screen.

**Step 2.** Click the **Find** icon and use the **Next Record** icon to find the desired Agreement type.

**Step 3.** Select the short name of the Agreement asset classification in the **Code** field. The rest of the fields automatically populate with the associated Agreement asset classification information.

**Step 4.** Enter a date that an Agreement asset classification becomes active for an Agreement type in the **Begin Date** field.

**NOTE:** Providing a **Begin Date** is optional. If the Agreement asset classification is always valid, leave this field blank.

**Step 5.** Enter a date that an Agreement asset classification becomes inactive for an Agreement type in the **End Date** field.

**NOTE:** Providing an **End Date** is optional. If the Agreement asset classification is always valid, leave this field blank.

**Step 6.** Add rows as needed to assign the Agreement asset classifications that support the selected Agreement type.

**Step 7.** Click the **Save** icon to save the Agreement asset classifications to Agreement type mappings.

## CREATE AGREEMENTS

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Once Agreement Types have been created, individual Agreements can be created. Before associating assets to an Agreement, users must first create an Agreement. This section describes and illustrates how to create an Agreement, including how to:

- Specify Agreement Types
- Specify Agreement Parties
- Specify Agreement Contacts
- Specify Valid Agreement Asset Sources

## CREATE AN AGREEMENT

Use the **Maintain Agreements** screen to define an Agreement.

Scenario: The following graphic illustrates how to create a new Agreement.

### NAVIGATION

- Click Agree
- Click Maintain Agreements

The screenshot displays the 'Maintain Agreements' interface. At the top, the title bar reads 'Maintain Agreements - asag2020'. The main form area is titled 'Agreements' and contains the following fields:

- Identifier:** LEASE-01
- Type:** LEASE
- Parent Identifier:** (empty)
- Type:** (empty)
- Begin Date:** 11/28/2012
- Scheduled End Date:** (empty)
- End Date:** (empty)
- Agr User Fields\*:** (empty)

Below the main form is a 'Text' button and a series of tabs: Parties, Contacts, Valid Sources, Assets, Modifications, Authorized, IUID Upload, and IUID Reconciliation (Not Started). The 'Parties' tab is selected, showing two sections:

- Entered into by:**
  - Organization:** ASSET CENTER 01
  - Organization EID:** (empty)
  - Sponsor:** HUMAN RESOURCES
- Entered into with:**
  - Organization:** ACME RESOURCES
  - Or Person:** (empty)
  - Last Name\*:** (empty)
  - First:** (empty)
  - Mid:** (empty)

**Step 1.** Navigate to the **Maintain Agreements** screen.

**Step 2.** Enter the Agreement identifier in the **Identifier** field for the new Agreement. In this example, the Agreement identifier is **LEASE-01**.

**Step 3.** Select the Agreement type from the **Type** field. In this case, the Agreement type is **Lease**.

**Step 4.** The **Parent Identifier** and the related **Type** fields are primarily used for sub-contracts and are optional.

**Step 5.** Enter the start date for the Agreement in the **Begin Date** field.

**Step 6.** Enter the anticipated end date of the Agreement in the **Scheduled End Date** field. If the Agreement is open ended, this field can remain blank.

**Step 7.** Optionally, double click in the **User Fields** and enter any additional information that is desired relate to the agreement.

- Step 8. Specify the internal organization that is party to the Agreement and the asset center that is the sponsor of the Agreement in the **Entered into by** block. In this case, the internal organization is **ASSET CENTER 01** and their sponsor is **Human Resources**. Note: The Sponsor field is optional.
- Step 9. Specify the organization or Person in the **Entered into with** block. In this example, the organization, **ACME Resources**, is the external party to the Agreement. If the external party to the Agreement is a person and not an organization, leave the **Organization** field blank and enter the name of the person with which the Agreement is entered.
- Step 10. Click on the **Contacts** tab. Enter any internal or external contacts associated to the Agreement by selecting the names from the LOV.

NOTE: To use the list of values, the people must be in Sunflower. Depending upon the configuration of the application, the user may have access to add new internal or external people by pressing the **Edit** button.

The screenshot shows a software interface for managing agreements. At the top, the window title is 'Maintain Agreements - asag2020'. The main area is titled 'Agreements' and contains several input fields: 'Identifier' (LEASE-01), 'Type' (LEASE), 'Parent Identifier', 'Begin Date' (11/28/2012), 'Scheduled End Date', and 'End Date'. Below these fields is a 'Text' button. A horizontal tab bar is visible, with 'Contacts' selected. Under the 'Contacts' tab, there are two sections: 'Internal Contacts' and 'External Contacts'. Each section has fields for 'Initiated By', 'Agr Admin', 'Prop Admin', and name fields (Last Name\*, First, Mid). In the 'Internal Contacts' section, the last name is 'ANDERSON' and the first name is 'JOE'. In the 'External Contacts' section, the last name is 'DAVIS' and the first name is 'ANN'.

- Step 11. Click on the **Valid Sources** tab. This tab enables users to specify one or more sources from which assets can be selected for the Agreement. Select the Source or Sources from which assets can be selected for this Agreement. This is an optional step.

Step 12. Use the **Begin Date** field to limit the valid asset source assignment to no earlier than a specific date. This field is optional and may be left blank. Use the **End Date** field to limit the valid asset source assignment to no later than a specific date. This field is optional and may be left blank.

The screenshot shows a software window titled 'Maintain Agreements - asag2020'. The main area is titled 'Agreements' and contains several input fields: Identifier (LEASE-01), Parent Identifier, Begin Date (11/28/2012), Scheduled End Date, Type (LEASE), and End Date. Below these fields is a 'Text' button and a row of tabs: Parties, Contacts, Valid Sources (selected), Assets, Modifications, Authorized, IUID Upload, and IUID Reconciliation (Not Started). The 'Valid Sources' tab displays a table with the following data:

Description	Begin Date	End Date
AUDIOVISUAL DEPARMENT		
INFO TECHNOLOGY DEPARTMENT		

Step 13. Click the **Save** icon to save the new Agreement.

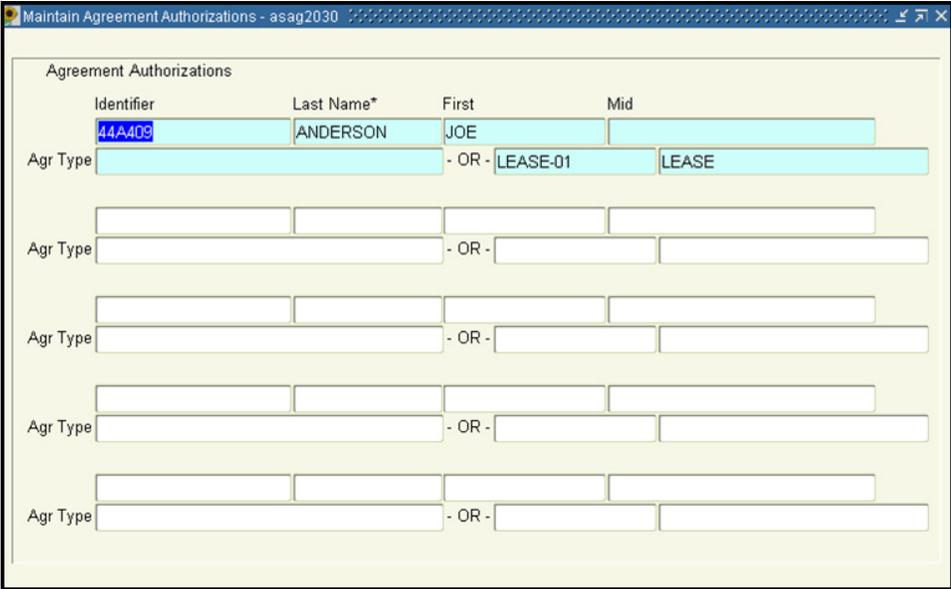
### CREATE AUTHORIZED USERS

Use the **Maintain Agreement Authorizations** screen to authorize personnel to work with Agreements and Agreement assets (addition, modification, or retirement of Agreement assets). An organization can use this screen to authorize personnel to work with specific Agreement types *or* specifically identified Agreements. The following example illustrates how to assign authorization for a specific Agreement and for a group of Agreements.

### ASSIGN AUTHORIZATION TO MANAGE AGREEMENTS BY AGREEMENT TYPE

Scenario: The following graphic illustrates how to use the **Maintain Authorizations** screen in order to assign a user, **Joe Anderson** - the lease administrator for the organization, the authority to manage and administer all Agreements with the Agreement Type "Lease".

- NAVIGATION**
- Click Agree
  - Click Maintain Agreement Authorizations



- Step 1. Navigate to the **Maintain Agreement Authorizations** screen.
- Step 2. Enter the identifier (e.g. badge number or employee number) of the person that is authorized to work with Agreements in the **Identifier** field.
  - If the identifier is unknown, enter their last name in the **Last Name** field and press **Enter** to display a list of people with the same last name.



**Step 3.** Select the Agreement Type (e.g. Lease) on which the user will be authorized in the **Type** field.

**Step 4.** Click the **Save** icon.

## ASSIGN AUTHORIZATION TO MANAGE SPECIFIC AGREEMENTS

Organizations may choose to authorize an individual to administer a specific Agreement or several specific Agreements defined by **Agreement Identifier** (and not **Agreement Type**).

Scenario: The following graphic illustrates how to give a user authority to manage a specific Agreement by entering the Agreement Identifier on the Maintain Agreement Authorizations screen rather than the Agreement Type.

### NAVIGATION

- Click Agree
- Click Maintain Agreement Authorizations

Identifier	Last Name*	First	Mid
44A409	ANDERSON	JOE	LEASE

Agr Type [ ] - OR - [ ]

Agr Type [ ] - OR - [ ]

Agr Type [ ] - OR - [ ]

Agr Type [ ] - OR - [ ]

**Step 1.** Navigate to the **Maintain Agreement Authorizations** screen.

**Step 2.** Enter the identifier (e.g. badge number or employee number) of the person that is authorized to work with Agreements in the **Identifier** field.

- If the identifier is unknown, enter their last name in the **Last Name** field and press **Enter** to display a list of people with the same last name.

**Step 3.** Leave the **Agreement Type** field blank and select the Agreement **Identifier** for the Agreement on which the user will be authorized in the field to the right of **Agreement Type**.

**Step 4.** Click the **Save** icon.

## ADDING COMMENTS, PICTURES OR ATTACHMENTS TO AN AGREEMENT

Click the **Text** button on the **Maintain Agreements** screen use the **Capture Comments, Pictures and Attachments** screen to capture the terms and conditions of an Agreement, attach pictures, or attach documents associated with an Agreement. Depending on the entry path used to get to the **Capture Comments, Pictures and Attachments** screen, the supporting documentation, comments and pictures are associated with either the Agreement, Agreement assets or Agreement modifications.

- If accessing this screen from the **Maintain Agreements** screen, then comments are associated with the Agreement.
- If accessing this screen from the **Agreement Modifications** screen, then comments are associated with Agreement modifications.
- If accessing this screen from the **Maintain Agreement Assets** screen, then comments are associated with the Agreement asset.

Scenario: The following graphic illustrates how to use this screen to add text comments to an Agreement.

### NAVIGATION

- Click Agree
- Click Maintain Agreements
- Click the Text button

The screenshot shows a web application window titled "Capture Comments, Pictures and Attachments - saut0060". The main content area has a search bar containing "AGREEMENT LEASE 2000-XX-01". Below the search bar are three tabs: "Comments", "Pictures", and "Attachments", with "Comments" being the active tab. Under the "Comments" tab, there is a "Comment Type" dropdown menu currently set to "TEXT". Below that is a "New Comment" section with a text input field containing the placeholder text "Add comments about about the agreement. Add pictures and/or upload files.". At the bottom of the screen is a "Comment History" section, which is currently empty. The interface includes standard web controls like scroll bars and a close button in the top right corner.

## ADD PICTURES

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

Scenario: The following graphic illustrates how to use this screen to attach a picture to an Agreement.

### NAVIGATION

- Click Agree
- Click Maintain Agreements
- Click the Text button
- Click the Pictures tab

**Step 1.** Navigate to the **Maintain Agreements** screen.

**Step 2.** Click the **Text** button

**Step 3.** Click the **Pictures** tab.

**Step 4.** Click the **Add Picture** button to open the **Picture Upload** screen.

Step 5. Navigate to the related asset picture file and choose the appropriate picture.

**NAVIGATION**

- Click Pictures tab
- Click Add Picture

**Picture Upload**

File  
C:\Documents and Settings\esoria\My Documents\My Pictures\Sample.jpg Browse...

Picture Type  
OTHER

Description  
Provide a description about the attached picture and its relation to the agreement and agreement assets.

Upload Cancel

Step 6. Click the **Browse** button to select a picture from a directory path where the picture resides.

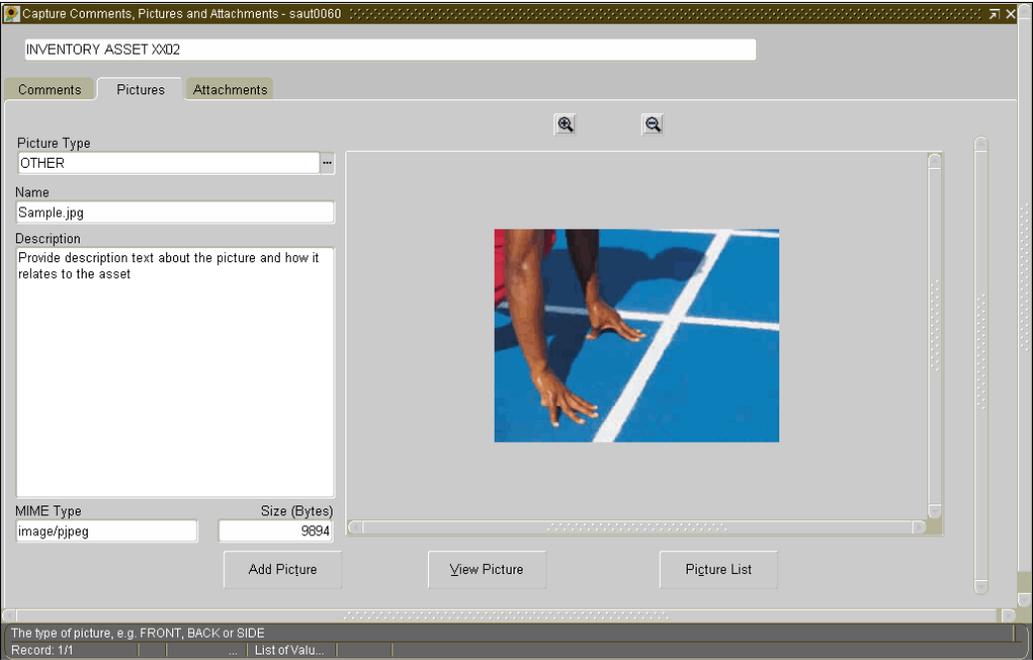
Step 7. Select the type of picture that to upload in the **Picture Type** field.

Step 8. Use the **Description** field to provide descriptive text about the picture and how it relates to the asset.

Step 9. Click the **Upload** button. If successful, a web page pops up indicating that the file uploaded successfully.

Step 10. Close the web page to return to Sunflower.

Step 11. Click the **OK** button to display the picture.



Step 12 Click the **Save** icon to save the changes.

## ADD ATTACHMENTS

Use the **Attachment** tab to add documents related to the specified Agreement with the **Add Attachment** button. If there is more than one attachment for an Agreement, use the **Attachment List** button to view the list of attachments associated to the Agreement. The **View Attachment** button displays a given attachment in a separate web browser from that can be downloaded or saved to a local directory.

Scenario: The following graphic illustrates how to upload an attachment to an Agreement.

### NAVIGATION

- Click Agree
- Click Maintain Agreements
- Click the Text button
- Click the Attachments key
- Click Add Attachment
- Specify details
- Click Upload

The screenshot shows a web browser window titled "Capture Comments, Pictures and Attachments - saut0060". The main content area is for "INVENTORY ASSET X002". There are three tabs: "Comments", "Pictures", and "Attachments". The "Attachments" tab is selected. Below the tabs, there are several input fields: "Attachment Type" (dropdown menu set to "OTHER"), "Name" (text box containing "Training Sample Word Doc.doc"), "MIME Type" (text box containing "application/msword"), "Size (Bytes)" (text box containing "24064"), and "Description" (text area containing "Sample Attachment file."). At the bottom of the dialog, there are three buttons: "Add Attachment", "View Attachment", and "Attachment List". A status bar at the very bottom indicates "Record: 1/1" and "List of Valu...".

**Step 1.** From the **Maintain Agreements** screen, click the **Text** button.

**Step 2.** Click the **Attachments** tab to open the **Attachment Upload** dialog box.

**Step 3.** Click the **Browse** button to select an attachment from its location on a local or shared directory.

**Step 4.** Use the **Attachment Type** field to select the type of attachment that is being uploaded.

**Step 5.** Use the **Description** field to provide descriptive text about the attachment and how it relates to the asset.

**Step 6.** Click the **Upload** button. If successful, a web page pops up indicating that the file uploaded successfully.

Step 7. Close the web page to return to Sunflower.

Step 8. Click the **OK** button to display the attachment.

Step 9. Click the **Save** icon to save the changes.

## CREATE AGREEMENT ASSETS

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There are two methods for creating Agreement assets and adding them to an Agreement:

- Use the **Assets** tab on the **Maintain Agreements** screen or
- Create Agreement assets from the **Maintain Agreement Assets** screen

The first method requires creating an Agreement asset from an existing interest asset such as an inventory asset. The second method enables users to create Agreement assets without an existing interest asset. The following section illustrates how to create Agreement assets using both methods.

## USE THE MAINTAIN AGREEMENTS SCREEN TO CREATE AGREEMENT ASSETS

Scenario: The following graphic illustrates how to add assets to an Agreement. In this example, the existing inventory asset, **ASSETXX**, is being added to the **LEASE-01** lease as **AUDIO VISUAL EQUIPMENT**.

### NAVIGATION

- Click Agree
- Click Maintain Agreements

The screenshot shows the 'Maintain Agreements - asag2020' window. The 'Assets' tab is active, displaying a table of 'Agreement Assets'. The table has columns for 'Ok', 'Existing Asset', 'Manufacturer', 'Model', and 'Official Name'. The first row is selected, showing an existing asset 'ASSETXX' with manufacturer 'NIKON', model '915153-T', and official name 'CAMERA, VIDEO'. The 'Agr Classification' is set to 'LEASE TO OWN'. The 'Identifier' field is populated with 'ASSETXX'. The 'Source' field is populated with 'AUDIOVISUAL DEPARTMENT'. The 'Agr User Fields\*' field is empty. The 'Message' field at the bottom shows 'Complete'.

- Step 1. On the **Maintain Agreements** screen, click the **Find** icon and enter the Agreement to which assets will be added.
- Step 2. Click the **Find** icon again. The Agreement information is displayed.
- Step 3. Click the **Assets** tab
- Step 4. Press the **Insert** record icon or scroll down to the first available row.
- Step 5. Select the existing interest asset type in the **Interest Type** field (e.g. INV)
- Step 6. Enter the existing asset identifier in the **Identifier** field. The **Manufacturer**, **Model**, and **Official Name** fields automatically populate upon tabbing out this field.
- Step 7. Enter the **Agreement Interest Type** asset identifier in the **Identifier** field. An existing interest asset identifier can be used or create a new Agreement asset identifier to suit the business practices.
- Step 8. Specify a valid **Agreement Asset Source**, if applicable, for the asset. This field is optional



[Step 9](#). Specify a valid **Agreement Asset Classification**, if applicable, for the asset. This field is optional.

[Step 10](#). Click the **Save** icon to add the asset to the Agreement.

USE THE MAINTAIN AGREEMENT ASSETS SCREEN TO CREATE NEW AGREEMENT ASSETS

Users can also use the **Maintain Agreement Assets** screen to create Agreement assets and associate those assets to an Agreement. As mentioned above, agreement assets can be created on this screen with or without an already existing interest asset.

Scenario: The following graphic illustrates how to create an Agreement asset for which another interest asset does NOT yet exist. The required data fields will be populated for the new asset. Once the asset record is saved, the asset is tied to Agreement selected, **LEASE-01**.

NAVIGATION

- Click Agree
- Click Maintain Agreement Assets

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

Step 2. Select the appropriate Agreement **Identifier** from the LOV.

NOTE: An agreement asset cannot be created unless it is associated with an Agreement that already exists in Sunflower. In this case, the Agreement identifier is **LEASE-01**. The **Agreement Selection** window closes and the **Maintain Agreements Assets** screen appears.

**Step 3.** Enter an Agreement interest asset identifier in the **Identifier** field, e.g. ASSETYY.

NOTE: The Agreement asset identifier can be the same as an existing interest asset, but for this scenario, there is no existing interest asset so a new Identifier will be assigned to the Agreement asset according to the business practices.

NOTE: If the user would like a system generated identifier, press the meta character (default meta character is.) and press the Tab key.

**Step 4.** In the **Manufacturer** field select a value from the drop down.

**Step 5.** In the **Model** field, select the appropriate model number from the LOV.

NOTE: The **Catalog ID**, **Official Name**, and **Model Name** fields will default based upon the **Manufacturer** and **Model** Number.

NOTE: If a Manufacturer or Model Number does not appear in the LOV, the values must be added by the Sunflower Administrator or Sunflower Cataloger.

**Step 6.** Enter the appropriate serial number in the **Serial Number** field.

NOTE: This is an optional field, but if a value is populated, it must be unique for the manufacturer and model number combination.

**Step 7.** Optionally, enter a value in the **Drawing Number** field. This can be used to store the bill of material number or engineering drawing number.

**Step 8.** Select the method of acquisition in the **Initial Event** field from the LOV.

**Step 9.** Double Click in the **User Fields** to display any additional fields to capture acquisition information. This is configured by the administrator and is optional.

**Step 10.** Double Click in the **Asset Value** field to enter the asset's value. Click save to return to the main screen.

**Step 11.** Enter the appropriate dates in the following date field:

- Acquisition Date: The date the item was purchased or obligated
- Responsibility Date: The date the item was actually received
- Effective Date: The effective date of the property information. This date will display on the asset timeline as the initial event date.

**Step 12.** Select the **Asset Condition** from the LOV.

**Step 13.** Specify any alternate IDs for the Agreement assets in the **Alternate Id 1, 2, and 3** fields.

NOTE: Used if the asset has one or more alternate tracking identifiers. Alternate Ids 1-3 - are additional tag numbers that can be associated with an Agreement asset by using an alternative Id (e.g. vendor's tag number or an organization's project affiliated Id, etc.)

Step 14. Specify the asset source in the **Asset Source** field.

Step 15. Specify the Agreement asset's classification in the **Agr Classification** field.

Step 16. Select the organization information (e.g. **Manager, Owner, Steward**) for the Agreement asset.

Step 17. Select the Custodian of the asset by clicking in the **Last Name** field and selecting from the LOV.

Step 18. Select the User of the asset by clicking in the **Last Name** field and selecting from the LOV.

Step 19. Select the location information by double-clicking in the **Location** complex field and selecting a Site, Structure Level One and Structure Level Two. (Site is the only required Location field). Click save to return to the main screen.

Step 20. The **Add'I Information** button opens the **Catalog Information** screen where catalog entry information may be reviewed and enter override data for properties such as **Service Life** and **Salvage Value**.

Step 21. The **Comment/Picture/Attachment** button allows a user to add a comment or update a picture or attachment to the Agreement Asset.

Step 22. The **Commodity** button opens the **Commodity** screen to enter information about commodity assets, (e.g. screws, pencils, etc.).

NOTE: This button is only active when an asset has been designated as a commodity. If the Agreement asset is created from an existing asset, the existing asset must be specified as a commodity for this button to be active on this screen.

Step 23. Click the **Save** icon to create the new Agreement asset.

## USE THE MAINTAIN AGREEMENT ASSETS SCREEN TO CREATE AGREEMENT ASSETS FROM EXISTING ASSETS

In the previous example, an Agreement Asset that did not have an existing interest was created on the Maintain Agreement Assets Screen. In the following scenario, an Agreement Asset will be created from an existing Inventory Asset on this screen. Note: When creating Agreement assets from an existing interest asset, users can reuse the existing interest asset Identifier or users can create a new Agreement asset Identifier. This is based on the organization's business practices. Scenario: The following graphic illustrates how to create an Agreement Asset from an existing Inventory Asset.

### NAVIGATION

- Click Agree
- Click Maintain Agreement Assets

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

**Step 2.** Select the appropriate Agreement **Identifier** from the LOV.

NOTE: An agreement asset cannot be created unless it is associated with an Agreement that already exists in Sunflower. In this case, the Agreement identifier is **LEASE-01**. The **Agreement Selection** window closes and the **Maintain Agreements Assets** screen appears.

**Step 3.** Enter an Agreement interest asset identifier in the **Identifier** field. In this scenario, the same Identifier will be used as the Inventory Asset Identifier: **ASSETAA**.

**Step 4.** In the **Existing Interest asset** field, select **INV** for Type

**Step 5.** Enter the Inventory Asset Identifier (**ASSETAA**) and hit tab. The asset information is displayed.

**Step 6.** Enter any additional data that is needed for the Agreement Asset. Two fields that may need completion are **Asset Source** and **Agreement Asset Classification** since these fields do not appear on the Inventory Asset Record.

**Step 7.** Click **Save** to create the Agreement Asset.

## USE AGREEMENT ASSET SUMMARY AND HISTORY TO REVIEW THE AGREEMENT ASSET

Use the **Agreement Asset Summary and History** screen to review the history of an Agreement asset. The screen displays the current record as well as a timeline of the asset's lifecycle. The **Agreement Asset Summary and History** screen has two tabs: **Timeline** and **Details**. The **Timeline** tab shows a line by line view of each transaction performed on the asset. The **Details** tab gives a view of the asset at each state in its history.

Scenario: The following graphic illustrates how to review the current record of the **ASSETXX** Agreement asset.

### NAVIGATION

- Click Agree
- Click Agreement Asset Summary and History

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

Assets Identifier: **ASSETXX** Identifier Type: Parents: 0 Children: 0 C/A/P: 0  
 Unique Name: Current Identifier: **ASSETXX**  
 Default Location\*: View Map

Timeline Details

Ull: None Captured  
 Other Identifiers: AGR, INV / ASSETXX  
 Sort By: 1 DATETIME DESC, 2 DATETIME DESC, 3 DATETIME DESC  
 Get Records

Datetime	Category	Description	Attributes	Document?
12/02/2012 11:13:47	ONGOING EVENT	CHANGE LOCATION	ARLINGTON, VA_ BUILDING__1	
12/02/2012 11:13:47	ONGOING EVENT	CHANGE STEWARD	ASSET CENTER 02	
12/02/2012 11:13:27	ONGOING EVENT	CHANGE CUSTODIAN	ANDERSON JOE 44A409	
11/28/2012 16:53:02	ONGOING EVENT	ADDED TO AGREEMENT	LEASE-01 LEASE_ SUBJECT TO AGREEMENT	
11/28/2012 16:53:02	INITIAL EVENT	(AGR ASSETXX) SUBJECT TO AGREEMENT		
11/28/2012 16:43:25	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST_4500__0	
11/28/2012 16:43:25	INITIAL EVENT	(INV ASSETXX) PURCHASE		

Timeline Report Record Properties

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

**Step 2.** Enter the Agreement asset identifier, **ASSETXX**, in the **Identifier** field and press tab or enter.

**Step 3.** The **Timeline** tab displays the historical timeline of the Agreement Asset

NOTE: Click on the magnifying glass to display attributes about any event

NOTE: Click on **Record Properties** to display the creator information for any event

**Step 4.** Click on the **Details** tab to see the details of the asset.

NOTE: The current state of the asset is displayed on this tab. Use the scroll bar to scroll through previous states of the asset.

## AGREEMENT ASSET SUMMARY AND HISTORY FIELD TERMS

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

### Agreement Asset Summary and History Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
<b>Include History</b>	When users select the Include History checkbox, the screen returns current and historical records for the selected Agreement asset. To view the other records, click the Previous Record and Next Record icons on the Tool Bar.
<b>Next/Previous Record Indicator</b>	The field adjacent to the Include History checkbox indicates if there are multiple records for the selected Agreement asset. A v indicates that users are viewing the most current record for the asset. Users can scroll through the earlier records of an asset by selecting the Next Record icon to view the history of that Agreement asset. A ^ v indicates that users can select either the Previous Record icon or Next Record icon to view the other records for the selected Agreement asset. A ^ indicates that users are viewing the earliest record entry for the Agreement asset and users can only scroll back through the Agreement asset records using the Previous Record icon.
<b>Parents</b>	The Parents field displays the number of parent records for the current asset record that users are viewing. If an asset has a parent asset association, the number of associations displays in the Parents field. An asset can have multiple parents. Double click in the Parents field to view the parent record information on the Maintain Asset Structures screen.
<b>Children</b>	The Children field displays the number of child records for the current asset record that users are viewing. An asset can have multiple children. Double click in the Children field to view the child record information on the Maintain Asset Structures screen.
<b>C/A/P</b>	The C/A/P field indicates if there is a comment <b>C</b> , attachment <b>A</b> or picture <b>P</b> attached to the selected Agreement asset record.
<b>Identifier</b>	The asset identifier is a unique tracking number for the assigned Agreement asset. For example, a barcode, tag number or property identification number.
<b>Identifier Type</b>	Displays the identifier type, (e.g. barcode, RFID, or PIN).
<b>Current Identifier</b>	Displays the tracking identifier assigned to the Agreement asset when the historical record was current.
<b>Unique Name</b>	Displays the unique name assigned to the Agreement asset.
<b>Manufacturer</b>	Displays the name of the manufacturer of the asset.
<b>Model Number</b>	Displays the model number assigned to the asset by the manufacturer.
<b>Official Name</b>	Displays the organization's official description for the asset by a particular manufacturer and model combination.
<b>Model Name</b>	Displays the model name assigned to the asset by the manufacturer.
<b>Serial Number</b>	Displays the serial number assigned to the asset by the manufacturer.
<b>Drawing No</b>	Displays the drawing number used to design and construct the asset. Generally used for architectural and construction project use.
<b>Stock Number</b>	Displays the stock number associated with a material Agreement asset.

## Agreement Asset Summary and History Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
<b>Initial Event</b>	Displays the asset initial event type. For example, <a href="#">Purchase</a> , <a href="#">Fabrication</a> or <a href="#">Transfer</a> . An initial event is the asset's method of acquisition. Sunflower enables users to establish the initial event types that best suit the organization. Users can use the Administration module to define other Asset Initial Event Types for the organization by using the Maintain Asset Event Types screen, select the <a href="#">Asset Initial Event Type</a> category, and then add the Asset Event Type.
<b>User Fields</b>	Displays user field information associated with the initial event.
<b>Final Event</b>	Displays the asset final event type. For example, <a href="#">Excess Sale</a> or <a href="#">Transfer</a> . A final event is the method for recording the retirement of an asset. Sunflower enables users to capture each interest asset's final event. Users can use the Management module to further define asset final events for the organization by using the Create Inventory Asset Final Events screen.
<b>User Fields</b>	Displays user field information associated with the final event.
<b>Asset Value</b>	Displays the value entered for the asset. Press the Edit icon to display the asset value component and summary detail. The field adjacent to Asset Value specifies if the asset is capitalized or not capitalized. Users can capitalize an asset with the Finance module using the Capitalize Financial Assets screen.
<b>Acquisition Date</b>	Displays the date the asset was acquired.
<b>Responsibility Date</b>	Displays the date the organization became responsible for the asset.
<b>Asset Condition</b>	Displays the current condition of the asset.
<b>Effective Date</b>	Displays the date of the last asset transaction. (event)
<b>Expected Return Date</b>	Displays the expected return date of an asset that has been loaned, stored, or sent out for repair.
<b>Act Status/Type</b>	Displays the current active status of an asset such as <a href="#">In Service</a> or <a href="#">Storage</a> .
<b>Flags</b>	Displays the flags assigned to an asset.
<b>Activity Type</b>	Displays the asset's activity type. Users can create activity types with the Administration module by using the Maintain Domains screen, select the <a href="#">Activity Type</a> domain and modify or add a new activity type.
<b>Manager</b>	Displays the organization that manages the asset. A Manager may be the child organization of an Owner in a parent-child hierarchical structure.
<b>Owner</b>	Displays the organization that owns the asset. An Owner is the highest level of authority in a parent-child hierarchical structure. It can be the parent of a Manager.
<b>Steward</b>	Displays the organization that is the steward of an asset. A Steward may be the child organization of a Manager in a parent-child hierarchical structure.
<b>Rep</b>	Displays the name of the steward's primary asset center representative.
<b>Custodian</b>	Displays the asset's custodian. A custodian is the person in possession of and responsible for the control and care of an asset.
<b>User</b>	Displays the user of an asset. The person that is authorized to use an asset.
<b>Location</b>	Displays the asset's location.

**Agreement Asset Summary and History Field Terms (Continued)**

FIELD NAME	DESCRIPTION/EXPLANATION
<b>Document</b>	Displays the type of supporting documentation, documentation identifier, storage type and organization for an asset.
<b>User Fields</b>	Displays user field information associated with the Inventory Asset.
<b>Global User Fields</b>	Displays global user field information applicable to the Core Asset record.
<b>Creator Information</b>	Click to open the Creator Information display box to view the Transaction Creator Information. Users can click the Next Record and Previous Record icons to view the different asset state transactions for an asset. The Transaction Creator Information captures the date and time, and the creator of each transaction.
<b>Add'l Information</b>	Click to open the Add'l Information display box to view additional information associated with the Agreement asset.

## MAINTAIN AGREEMENT ASSETS

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The Agreement module facilitates the detailed tracking of the relationships between assets, organizations and people as they change over time. After users acquire the assets, users will need to assign a location, a responsible party and organization for each asset.

Sunflower enables users to maintain the Agreement assets by using several Agreement module screens to update several of the attributes of the Agreement assets.

- The **Maintain Agreement Assets** form can be used to update property records one asset at a time.
- The **Change Agreement Asset Information** form can be used to conduct updates on groups of agreement assets in a single transaction.
- The **Request Agreement Asset Change** and **Close Agreement Asset Change** forms provide users with lower level roles the ability to request and supervisors the ability to approve mass changes to agreement assets.
- The **Transfer Agreements** form allows the transfer of one or multiple assets between agreements. Users may update other information at the time of transfer, including the source and classification.
- The **Maintain Asset Structure** screen that enables users to manage the diverse set of Parent/Child asset structures.
- The **Maintain Agreement Asset Ongoing Events** form allows organizations to record events such as repairs, shipments, etc against one or multiple agreement assets.

The following section illustrates several common management tasks that users can perform in the Agreements module to manage and track the Agreement assets.

## CHANGE AGREEMENT ASSET INFORMATION ON MAINTAIN AGREEMENT ASSETS SCREEN

Common properties such as Activity Status, Location, and User will change throughout an asset's lifecycle and Sunflower enables users to capture these changes to reflect the most current information for the Agreement assets. Use the **Maintain Agreement Assets** screen to edit an Agreement asset.

Scenario: The following graphic illustrates how to edit the Agreement asset, **XX62**.

### NAVIGATION

- Click Agree
- Click Maintain Agreement Assets

The screenshot shows a software window titled "Maintain Agreement Assets - asag2010 (Page 1 of 3)". The form contains the following fields and values:

- Agreement Assets for DOD 2000-XX-01
- Ull: None Captured
- Other Identifiers (1): AGR, INV / XX62
- Identifier: XX62 (highlighted in yellow)
- Existing Interest asset: INV XX62
- Unique Name: (empty)
- Default Location\*: (empty)
- Catalog Identifier\*: 1
- Manufacturer: APPLE
- Official Name: COMPUTER PORTABLE
- Serial Number: XX62
- Initial Event: SUBJECT TO AGREEMENT
- Asset Value\*: \$6,500.00
- Asset Condition: (empty)
- Alternate Id 1: (empty)
- Asset Source: GOVERNMENT FURNISHED PROPERTY
- Activity Status: IN SERVICE
- Manager: SUNFLOWER SYSTEMS
- Steward: SUNFLOWER SYSTEMS
- Custodian: 020866
- User: (empty)
- Location\*: GENERAL OFF SITE\_2600 BOLLINGER CANYON\_SAN RAMON\_CA\_USA\_94583
- Document\*: (empty)
- User Fields\*: (empty)
- Global User Fields\*: (empty)

Additional fields on the right side of the form include:

- Type: (empty)
- Type Identifier: (empty)
- Parents: 0
- Children: 0
- C/AVP: (empty)
- Material: (checkbox, unchecked)
- Model: M5555
- Model Name: DUO DOCK
- Drawing No.: (empty)
- User Fields\*: (empty)
- Acquisition Date: 12/09/2000
- Responsibility Date: 12/09/2000
- Effective Date: 08/03/2012
- Expected Return Date: (empty)
- Alternate Id 2: (empty)
- Alternate Id 3: (empty)
- Flags\*: (empty)
- Activity Type: (empty)
- Owner: SUNFLOWER SYSTEMS
- Rep: (empty)
- First: KRISTEN
- Mid Init: SP
- First: CARL
- Mid Init: (empty)

Buttons at the bottom: Add1 Information, Commodity, Comment / Picture / Attachment, Asset Configuration, Asset Kit.

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

Step 2. Select the appropriate Agreement.

NOTE: The **Agreement Selection** window closes and the **Maintain Agreements Assets** screen appears.

Step 3. Enter an Agreement interest asset identifier in the **Identifier** field.

Step 4. Press the **Tab** button to display the asset's information.

Step 5. Change the data in the appropriate fields.

Step 6. Click the **Save** icon to create the new Agreement asset.

NOTE: Click the **Summary and History** icon to view the changes that were made on the Agreement Asset Summary and History Screen.

## CHANGE AGREEMENT ASSET INFORMATION ON THE CHANGE AGREEMENT ASSET INFORMATION SCREEN

Many changes can occur over the course of an asset’s lifecycle. The most common changes are those that affect the location, custodian and user asset. There are several ways to manage property records based on the type of changes required. While it is possible to change the information for a single record using the **Maintain Agreement Assets** screen, the **Change Agreement Asset Information** screen provides the ability to make updates to multiple assets at the same time.

Scenario: The following graphic illustrates how to use the **Change Agreement Asset Information** screen to update the location of multiple assets at once. In this example, the assets assigned to the **ASL-N2** contract have been moved to a new location, Room**101** in Building **BURRUS** at the **Blacksburg** Site.

### NAVIGATION

- Click Agree
- Click Change Agreement Asset Information

Ok	Δ	Identifier	Manufacturer / Model / Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ASL-N1-01	DELL_D333_COMPUTER PERSONAL_ASL-N1-01
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ASL-N1-09	DELL_D333_COMPUTER PERSONAL_ASL-N1-09
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ASL-N1-10	DELL_D333_COMPUTER PERSONAL_ASL-N1-10
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ASL-N1-13	DELL_D333_COMPUTER PERSONAL_ASL-N1-13
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ASL-N1-14	DELL_D333_COMPUTER PERSONAL_ASL-N1-14
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ASL-N1-18	DELL_D333_COMPUTER PERSONAL_ASL-N1-18
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ASL-N1-C1	DELL_D333_COMPUTER PERSONAL_ASL-N1-C1
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ASL-N3-09	FORD MOTOR COMPANY_TAUROS_SEDAN_ASL-N3-09

- Step 1. Navigate to the **Change Agreement Asset Information** screen
- Step 2. On the top part of the form under **New Information**, enter the new information that will apply to the selected agreement asset (in this example, the new location is entered by double-clicking in the **Location** complex field in the **New Information** block.).
- Step 3. Similar changes can be made for the **Cust Org** (Custodian Organization), **Custodian**, **User** and **Document** fields.

**Step 4.** To return only the assets assigned to the ASL-N2 contract, place the cursor in the **Identifier** field of the **Assets** block and click the **Find** icon to open the **Query Criteria** screen. Enter the appropriate search criteria and click the **Execute** button to execute the query. The query searches and retrieves from the database and displays them in the **Assets** block. users can now assign the new location to all or some of the assets.

**NOTE:** Users can select or un-select any assets that users do not want to apply changes to by unchecking the delta checkbox next to the agreement asset identifiers.

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

## REQUEST AGREEMENT ASSET CHANGE

In the event that the user does not have sufficient authority or roles to process updates to agreement assets, they may request the updates through the **Request Agreement Asset Changes** screen. When a request is made, an individual with more authority may approve or deny the request. This screen is similar to the Change Agreement Asset Information screen, but when transactions are saved on this screen, a request is saved only. The asset information will not be changed until the request is accepted by another user (refer to next section on closing Agreement Asset Requests).

Scenario: The following graphic illustrates how to use the **Request Agreement Asset Change Screen** to request a change of User, Custodian and Location of an Agreement asset.

### NAVIGATION

- Click Agree
- Click Request Agreement Asset Change

The screenshot shows a software window titled "Request Agreement Asset Change - asrm2030". It is divided into two main sections: "Request Information" and "Assets".

**Request Information:**

- Steward
- Custodian: CMCKINSTRIE (Last Name: MCKINSTRIE, First: COLLIN, Mid: )
- User: SMITH (Last Name: SMITH, First: JOHN, Mid: )
- Location: ARLINGTON, VA\_BUILDING\_1002\_ROOM\_21523-B
- Comment: (empty)

**Assets:**

There is a "Select All" button. Below it is a table with the following columns: "Ok", "Identifier", and "Manufacturer / Model / Official Name".

Ok	Identifier	Manufacturer / Model / Official Name
<input checked="" type="checkbox"/>	ASSETXX	NIKON_915153-T_CAMERA, VIDEO
<input type="checkbox"/>		

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

**Step 1.** Navigate to the **Request Agreement Asset Change** screen

**Step 2.** Under **Request Information**, select or enter the new information

**Step 3.** Under **Assets**, enter the Identifier for the Agreement Asset(s) for which the user is requesting a change.

**NOTE:** Instead of manually entering agreement asset identifiers, the search screen can alternatively be used to retrieve many agreement assets based on search criteria.

**Step 4.** Click the **Delta** next to the assets that will be changed

Step 5. Click the **Save** icon to save the request.

## CLOSE AGREEMENT ASSET REQUESTS

Once a request has been made to change agreement asset information, the request must be closed as Accepted or Denied. If accepted by another user, the changes to the agreement asset will be made. If denied, the agreement asset information will not be changed.

Scenario: The following graphic illustrates how to use the **Close Agreement Request Screen** to request a change of User, Custodian and Location of an Agreement asset.

### NAVIGATION

- Click Agree
- Click Close Agreement Asset Requests

Close Agreement Asset Requests - asmn2040

Assets

Identifier: ASSETXX

Manufacturer / Model / Official Name\*: NIKON\_915153-T\_CAMERA, VIDEO

Model Name: [ ]

Serial Number: 252352

Drawing No.: [ ]

A - Accept  
D - Deny  
W - Withdraw

A	D	W	Field
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Steward
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Custodian: MCKINSTRIE COLLIN CMCKINSTRIE
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	User: SMITH JOHN
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Location: ARLINGTON, VA_BUILDING_1002_ROOM_21523-B

Denial/Withdrawal Reason: [ ]

Message: Complete

**Step 1.** Navigate to the **Close Agreement Asset Request** screen

**Step 2.** Enter the Identifier of the asset with a request for change, in this case, **ASSETXX**, and tab or enter.

**Step 3.** The requested information is displayed. Click in the **A** column next to each field to accept the change. Click in the **D** column to deny the change.

**Step 4.** Click **Save**.

## MAINTAIN AGREEMENT ASSET ONGOING EVENTS

Sunflower uses the concept of **Ongoing Events** to support the various activities that occur during an asset's lifecycle. For example, an asset may require a periodic diagnostic test to validate whether the asset is in proper working order. Use the **Maintain Agreement Ongoing Events** screen to record events that occur to an Agreement Asset during its lifecycle.

NOTE: Sunflower automatically captures factory delivered ongoing events that occur for Sunflower transactions. The **Maintain Agreement Asset Ongoing Events** screen provides a mechanism for users to capture ongoing events that users create in addition to the factory delivered values using the **Administration** module **Maintain Asset Event Types** screen such as a Maintenance ongoing event. There are two ways to apply **Ongoing Events** within the **Maintain Agreement Ongoing Events** screen, **Assets to Events** or **Events to Assets**.

Scenario: The following graphic illustrates how to capture an ongoing event for maintenance. In this example, the **ASL-N1-02** asset is being sent out for repair.

### NAVIGATION

- Click Agree
- Click Maintain Agreement Asset Ongoing Events

Ok	Datetime	Ongoing Event	Event Details*	Document*	C/A/P
<input checked="" type="checkbox"/>	08/03/2012 18:16:48	SENT FOR REPAIR			
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

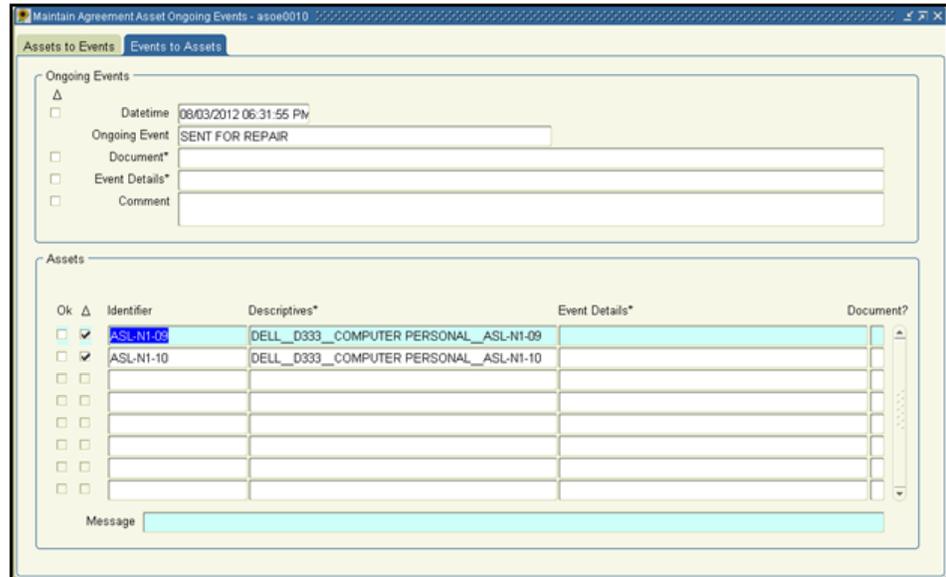
- Step 1. Navigate to the **Maintain Agreement Assets Ongoing Events** screen.
- Step 2. Click **Assets to Events** tab.
- Step 3. Enter an asset identifier in the **Identifier** field.

- Step 4. The **Datetime** field will populate with today's date, enter the date of the event by changing this field.
- Step 5. Select the ongoing event from the LOV in the **Ongoing Event Type** field. In this example, it is **SENT FOR REPAIR**.
- Step 6. Double click the **Event Details** complex field to enter additional information.
- Step 7. Double click the **Document** field to enter document information associated with the **Ongoing Event**.
- Step 8. Click the **C/A/P** button to enter any comments relevant to this asset and its ongoing event.
- Step 9. Click the **Save** icon to save the event.

Scenario: The following graphic illustrates how to capture an ongoing event for maintenance for multiple assets. In this example, **ASL-N1-09** and **ASL-N1-10** asset are being sent out for repair.

**NAVIGATION**

- Click Agree
- Click Maintain Agreement Asset Ongoing Events



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

**Step 2.** Click **Events to Assets** tab.

**Step 3.** The **Datetime** field will populate with today's date, enter the date of the event by changing this field.

**Step 4.** Select the ongoing event from the LOV in the **Ongoing Event Type** field. In this example, it is **SENT FOR REPAIR**.

**Step 5.** Double click the **Document** field to enter document information associated with the **Ongoing Event**.

**Step 6.** Double click the **Event Details** complex field to enter additional information.

**Step 7.** Enter comments in the **Comments** field.

**Step 8.** Enter asset identifiers in the **Identifier** fields, in this case, **ASL-N1-09** and **ASL-N1-10**.

**NOTE:** After entering a value in a field, hit the **Tab** key to move to the next field.

**Step 9.** Click the **Save** icon to save the event.

## TRANSFER AGREEMENT ASSETS

The **Transfer Agreements** screen allows users to transfer assets from one Agreement to another. This screen enables users to transfer a single Agreement asset or multiple Agreement assets in one step. This screen also allows for other changes to be made to the Agreement asset along with the transfer.

Scenario: The following graphic illustrates how to transfer 2 assets from their current Agreement to a new Agreement. In this example, Lease **1998-01-01** is going to be replaced by lease **1999-01-01**. Transfer all of the assets associated with the **1998-01-01** Lease to the **1999-01-01** Lease. In addition, the user on the assets will be changed to **Carl Miller** and location changed to **Livermore** Site in Building **121**, Room **101**.

### NAVIGATION

- Click Agree
- Click Transfer Agreements

- Step 1. Navigate to the **Transfer Agreements** screen.
- Step 2. Enter the **new** Agreement identifier in the **Agr Identifier** field.
- Step 3. Enter the new user information in the **User** field.
- Step 4. Enter the new location information in the **Location** complex field. Double-click the **Location** field to open the complex field and enter the new location.
- Step 5. Place the cursor in the **Identifier** field of the **Assets** block. The Agreement assets can be entered manually, or users can click the **Find** icon to open the **Query Criteria** screen. Enter the existing Agreement identifier in the **Agreement Identifier** field and click the **Execute** button to execute

the query. The query searches and retrieves from the database the Agreement assets assigned to the selected Agreement identifier and displays them in the **Assets** block.

NOTE: User can deselect any assets that are not wanted to apply changes to by unchecking the delta checkbox next to the inventory asset identifiers.

[Step 6](#). **Save** to commit the changes to the selected assets.

## CREATE PARENT/CHILD RELATIONSHIPS

Users can create Parent/Child relationships between Agreement assets that are related by using the **Maintain Asset Structures** screen. In the scenario below, **ASSETYY** will be made a child of **ASSETXX**.

### NAVIGATION

- Click Agree
- Click Maintain Asset Structures

- Step 1. Navigate to the **Maintain Asset Structures** screen.
- Step 2. Select **Agreement** in the **Type** field.
- Step 3. Enter the Identifier of the asset that will be the Parent asset in the **Identifier** field, in this case, **ASSETXX**.
- Step 4. In the **Structure Type** field, select **EMBEDDED IN AN ASSET**
- Step 5. The **Child** radio button is selected by default, indicating that all assets entered on the bottom part of the form will be children of **ASSETXX**.
- Step 6. Under **Related Assets**, select **AGREEMENT** as the type
- Step 7. Enter the **Identifier** of the Agreement asset that will be the child of **ASSETXX** and hit tab.
- Step 8. The asset information is displayed.
- Step 9. Click **Save** to create the Parent/Child Structure.

NOTE: Additional asset identifiers may be added under Related Assets if the parent asset will be a parent to more than one agreement asset.

## MAINTAIN AGREEMENTS

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As discussed in the previous sections, the management of Agreements and their assets consists of numerous tasks that an Agreement Clerk or Manager perform on a daily basis such as the update, transfer, and removal of assets. The following section illustrates several common management tasks that users can perform in the Agreements module to manage and track the Agreement Record itself, such as:

- View Assets on an Agreement
- Edit Agreements
- Track Modifications to Agreements
- Apply Events to an Agreement
- Close Agreements

## VIEW ASSETS ON AGREEMENT

Use the **Assets** tab to view all active assets currently assigned to the selected Agreement. This tab provides the ability to view assets in greater detail by clicking the **aSsets** button, which will take users to the Maintain Agreement Assets screen.

### NAVIGATION

- Click Agree
- Click Maintain Agreements
- Click the Assets tab

The screenshot shows the 'Maintain Agreements - asag2020' window. At the top, there are input fields for 'Identifier' (2012-XX-01), 'Parent Identifier', 'Begin Date' (08/01/2012), 'Scheduled End Date' (08/01/2013), 'End Date', and 'Agr User Fields\*'. Below these is a 'Text' button. A navigation bar contains tabs: 'Parties', 'Contacts', 'Valid Sources', 'Assets' (selected), 'Modifications', 'Authorized', 'IUID Upload (0)', and 'IUID Reconciliation (Not Started)'. Below the tabs is a sub-section titled 'Agreement Assets' with a 'Click aSsets to go to ASAG2010 Maintain Agreement Assets' button and a 'Ull Wizard' button. The main area contains a table with the following data:

Ok Existing Asset	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/> AGR 2012-XX-01-ABC	ACME PREFAB	T568FHY	TRAILER FOUNDATION
<input type="checkbox"/> AGR 2012-XX-01-DEF	ACME PREFAB	T568FHY	TRAILER FOUNDATION
<input type="checkbox"/> AGR 2012-XX-01-GHI	ACME PREFAB	T568FHY	TRAILER FOUNDATION

Below the table is a 'Message' input field.

**Step 1.** Navigate to the **Maintain Agreements** screen.

**Step 2.** Click the flashlight icon to enter query mode

**Step 3.** Enter the Agreement Identifier in the **Agreement Identifier** field.

**Step 4.** Click the flashlight again. The agreement is displayed.

**Step 5.** Click the **Assets** tab to view assets currently assigned to this agreement. Use the scroll bar to view additional assets.

**Step 6.** Click the **aSsets** button to view detailed information about a particular asset.

## EDIT AGREEMENTS

When the parameters of an agreement change, the Agreement record should reflect those changes. For example, if assets on a contract are to be extended for use beyond the original scheduled end date, apply the change to the Agreement accordingly. Use the **Maintain Agreements** screen to update the scheduled end date on the contract to reflect this extension or any other parameters (e.g. authorizations, modifications, assets, contacts etc.) for the Agreement.

Scenario: The following graphic illustrates how to update an Agreement. In this example, the scheduled end date of the **2012-XX-01** Agreement is being moved out a year from **08/01/2013** to **08/01/2014**.

### NAVIGATION

- Click Agree
- Click Maintain Agreements

**Step 1.** Navigate to the **Maintain Agreements** screen.

**Step 2.** Click the **Find** button to enter query mode.

**Step 3.** Enter the criteria that match the Agreement to update. (**2012-XX-01**)

**Step 4.** Click the **Find** button again to execute the query.

**Step 5.** Using the **Scheduled End Date** field, extend the expected end date of the lease one year. (**08/01/2014**)

Step 6. Click the **Save** icon to update the Agreement.

## MAINTAIN AGREEMENT BUSINESS EVENTS

Sunflower uses the concept of Business Events to support the various activities that occur during an Agreement's life cycle. For example, a lease for a vehicle may need to be extended or a modification may be made to a contract to accommodate for unforeseen events. Applying Business Events to Agreements allows for the accurate recording, tracking and reporting of these activities.

### SPECIFY THE DETAILS OF A SINGULAR AGREEMENT

Scenario: The following graphic illustrates how to use the **Maintain Agreement Business Events** screen to specify the details of the extension of a singular Agreement, including the reason and the actual Agreement document.

#### NAVIGATION

- Click Agree
- Click Maintain Agreement Business Events

The screenshot shows the 'Maintain Agreement Business Events' window. At the top, there are two tabs: 'Entities to Events' (selected) and 'Events to Entities'. Below the tabs is an 'Agreement' section with fields for Identifier (LEASE-01), Type (LEASE), Begin Date (11/28/2012), and End Date. Below that is a 'Business Events' table with columns: Ok, Business Event Date, Business Event Type, Business Event UDF\*, Document\*, and C/A/P. The first row is checked and contains the date 12/02/2012 01:07:30 PM, the type CONTRACT MODIFICATION, and the UDF EXTENDED PER TERMS OF LEASE. At the bottom, there is a 'Created by' field with the value OWNER REPOSITORY, an 'On' field with the value 12/02/2012 01:07:46 PM, and a 'Message' field with the value Complete. A 'Comment / Attachment / Picture' button is also visible.

**Step 1.** Navigate to the **Maintain Agreement Business Events** screen. The **Entities to Events** tab is selected.

**Step 2.** Select the Agreement to add an event to in the **Identifier** field.

**Step 3.** Select the event type to apply to the Agreement in the **Business Event Type** field. The date and time will automatically populate.

- Step 4. Double click within the **Business Event UDF** field to add details, in this case the reason for the modification as applicable.
- Step 5. Double click in the **Document** field to add the document associated with the event if applicable.
- Step 6. Click the **Comment/Picture/Attachment** button to enter any comments relevant to this Agreement Business event or add a document or picture.
- Step 7. Click the **Save** icon.

## SPECIFY THE DETAILS FOR MORE THAN ONE AGREEMENT

Scenario: The following graphic illustrates how to use the **Maintain Agreement Business Events** screen to specify the details of a modification made to more than one Agreement

### NAVIGATION

- Click Agree
- Click Maintain Agreement Business Events

Ok	Identifier	Type	Business Event UDF*	Document?	C/A/P
<input checked="" type="checkbox"/>	LEASE-01	LEASE	LEASE EXTENSION-3 MONTHS		
<input checked="" type="checkbox"/>	2012-1111	LEASE	LEASE EXTENSION-3 MONTHS		
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

- Step 1. Navigate to the **Maintain Agreement Business Events** screen. Click the **Events to Entities** tab.
- Step 2. Select the event type to be added in the **Business Event Type** field. The date and time should auto-populate.
- Step 3. Double click in the **Document** field to add the document associated with the event.
- Step 4. Double click within the **Business Event UDF** field to add details
- Step 5. Add a comment in the **Comment** box if needed.
- Step 6. Enter the identifiers of the Agreements that will be modified in the **Identifier** fields. The **Type** will auto populate.
- Step 7. Double click in the **Business UDF** field to add any additional information associated with the particular Agreement.
- Step 8. Click the change icon to check it.

Step 9. Click the **Save** icon. The **OK** boxes should now be checked.

## SPECIFY AGREEMENT MODIFICATIONS

Use the **Maintain Agreements Agreement Modifications** tab to specify any formal changes related to an Agreement and its associated assets. The benefits of this tab is to provide a mechanism for capturing details such as updates, extensions, asset additions, deletions or any details that affect the parameters of the Agreement. Click the **Modifications** tab on the **Maintain Agreements** screen to open the tab. Use of this screen is optional.

Scenario: The following graphic illustrates how to add modifications to an Agreement.

### NAVIGATION

- Click Agree
- Click Maintain Agreements

**Step 1.** Navigate the to **Maintain Agreement** Screen. Click the flashlight to put the form into query mode.

**Step 2.** Type the Agreement Identifier for the Agreement that is being modified in the **Identifier** field.

**Step 3.** Click the flashlight again to retrieve the Agreement

**Step 4.** Click the **Modifications** tab to view the **Agreement Modifications** screen.

**Step 5.** The **Modifications Date** field defaults to the current date when entering a new modification. This date can be edited to reflect the actual timing of the Agreement modification. Previous modifications associated with the Agreement display the date entered for those modifications.

**Step 6.** Enter the **Modification Identifier**.

**Step 7.** Use the **Text** button to capture comments regarding the modifications that have been made to the Agreement. The **Text** button opens the **Capture Comments, Pictures, and Attachments** screen.

**Step 8.** Click the **Save** icon to save the changes.

## IUID UPLOAD TAB AND IUID RECONCILIATION TAB

The **IUID Upload** tab and **IUID Reconciliation** tab are used in conjunction with the Sunflower Contract Reports Solution. These tabs are discussed in detail in the Sunflower Contracts Reports User Guide.

## CLOSE AN AGREEMENT

When an Agreement ends and all Agreement assets are removed from the Agreement, close (retire) the Agreement. To close an Agreement use the **Maintain Agreements** screen by specifying a date in the **End Date** field. Assets cannot be added to a closed Agreement. It is necessary to remove all assets from an Agreement before retiring the Agreement.

Scenario: The following graphic illustrates how to close Agreement **LEASE-01** by specifying the end date for the Agreement.

### NAVIGATION

- Click Agree
- Click Maintain Agreements

The screenshot shows a web application window titled 'Maintain Agreements - asag2020'. The main content area is titled 'Agreements' and contains several input fields. The 'Identifier' field is highlighted in yellow and contains the text 'LEASE-01'. The 'Type' field contains 'LEASE'. The 'Begin Date' field is highlighted in yellow and contains '11/26/2012'. The 'End Date' field is highlighted in blue and contains '12/02/2012'. Below these fields is a 'Text' button. A navigation bar below the main form contains tabs for 'Parties', 'Contacts', 'Valid Sources', 'Assets', 'Modifications', 'Authorized', 'IUID Upload (0)', and 'IUID Reconciliation (Not Started)'. The 'Parties' tab is selected, showing two sections: 'Entered into by' and 'Entered into with'. The 'Entered into by' section shows 'Organization' as 'ASSET CENTER 01' (highlighted in yellow) and 'Sponsor' as 'HUMAN RESOURCES'. The 'Entered into with' section shows 'Organization' as 'ACME RESOURCES' and 'Or Person' with fields for 'Last Name\*', 'First', and 'Mid'.

**Step 1.** Navigate to the **Maintain Agreements** screen.

**Step 2.** Click the **Find** button to enter query mode.

**Step 3.** Enter the Agreement **Identifier**.

**Step 4.** Click the **Find** button again to execute the query.

**Step 5.** In the **Agreements** block, in the **End Date** field, enter the date the Agreement closes.

**Step 6.** Click the **Save** icon to close the Agreement.

**NOTE:** A closed Agreement cannot have additional assets associated with it.

## RETIRE AGREEMENT ASSETS

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At some point, items will no longer be covered by the agreement. Items may:

- Be returned to the organization when the lease has expired
- Be returned from a person or organization under a property pass
- No longer be covered under a warranty
- Lost, Damaged, Destroyed, or Stolen.

When the item is no longer covered under the agreement, the agreement asset will be retired by recording a final event. The final event type will be based upon the reason the user is no longer accountable (i.e. theft, returned, etc). In addition, additional information related to the event, such as the authorizing document and event details may be recorded.

Once the item is retired in Sunflower, the history of that item can be reviewed in the **Agreement Asset Summary and History** form as well as in reports. In addition, if the organization becomes accountable for the property again on the same agreement or another, the user may reactivate the item by providing a new initial event related to the reinstatement. This chapter will also cover how to remove a final event in case one was recorded in error.

This section will cover:

- Retiring an Agreement Asset
- Reactivating an Agreement Asset
- Removing a Final Event from an Agreement Asset

## RETIRE AGREEMENT ASSETS

Use the **Create Agreement Asset Final Events** screen to retire Agreement assets.

### NAVIGATION

- Click Agree
- Click Create Agreement Asset Final Events

The screenshot shows a web application window titled "Create Agreement Asset Final Events - asmin2080". The window is divided into two main sections: "Final Events" and "Assets".

**Final Events Section:**

- Date:** 12/20/2012 (with a calendar icon)
- Final Event:** A yellow highlighted dropdown menu.
- User Fields\*:** A text input field.
- Document\*:** A text input field.
- Comment:** A text input field.
- Generate DD1149:** A button located below the input fields.

**Assets Section:**

Ok	Identifier	Manufacturer / Model / Official Name*
<input type="checkbox"/>		

**Message:** A text input field at the bottom of the window.

**Step 1.** Navigate to the **Create Agreement Asset Final Events** screen.

**Step 2.** Enter the retirement date in the **Date** field. Defaults to the current date.

**Step 3.** Specify the final event type in the **Final Event** field.

**NOTE:** **Final Event** is a key field that defines the reasons for the retirement (e.g. abandoned, returned, etc.).

**Step 4.** Specify additional details in the **User Fields** if the final event that users select has been extended.

**Step 5.** Double-click in the **Document** field to open the **Maintain Documents** screen and enter any documentation to support the retirement of the Agreement asset.

**Step 6.** Enter the Agreement asset identifiers that users are retiring in the **Identifier** field or press the **Find** button to search for assets. In this example, the Agreement asset identifier is **B123456**. The fields automatically populate with the manufacturer, model number and official name of the asset.

**Step 7.** Click the **Save** icon to retire the Agreement asset.

[Step 8](#). Press the **Summary and History** button on the toolbar to review changes made to the asset record.

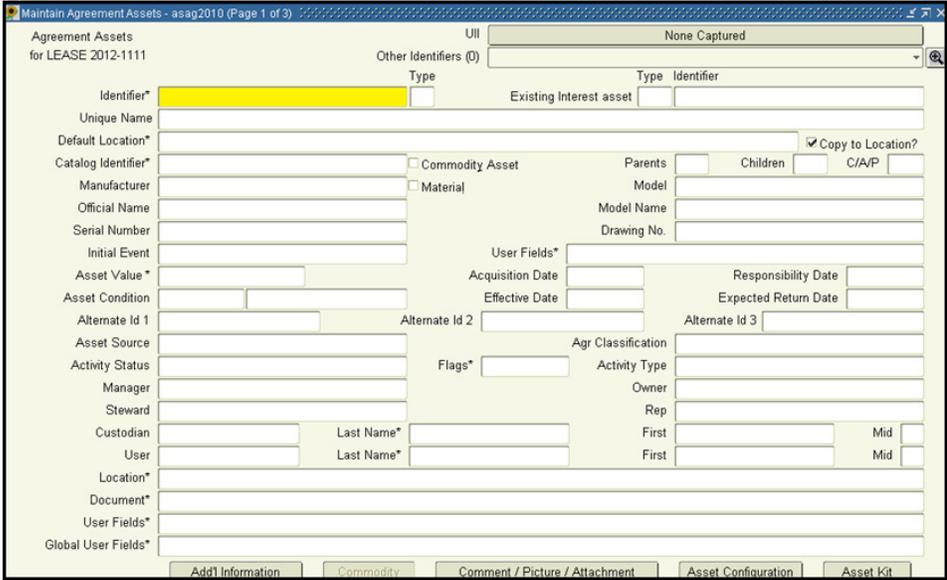
NOTE: Note the Removed from Agreement and Final Event.

REACTIVATE AN AGREEMENT ASSETS

Use the **Maintain Agreement Assets** screen to reactivate an asset on an agreement. The agreement can either be the one that it had been on previously, or a new agreement. The timeline of the asset will show that the organization was not accountable for a period of time between the retirement of the asset and the reactivation of the item. Note that users will need to provide the agreement and a new initial event at a minimum. The rest of the fields will default from the previous record, but can be updated as necessary.

NAVIGATION

- Click Agree
- Click Maintain Agreement Assets
- Select the Agreement
- Click the Tab key



- Step 1.** Navigate to the **Maintain Agreements Assets** screen.
- Step 2.** Select the appropriate **Agreement** from the list of values and press the Tab key.
- Step 3.** Enter an Agreement interest asset identifier in the **Identifier** field.

NOTE: The user will receive a message indicating that the item is retired, do you want to reactivate.

- Step 4.** Press **Continue**

NOTE: Values will default from the previous asset record with the exception of initial event type, source, and classification. All fields may be updated, but we will describe only these in this instruction.

- Step 5.** Select the method of acquisition in the **Initial Event** field from the LOV.

- Step 6.** Double Click in the **User Fields** to display any additional fields to capture acquisition information. This is configured by the administrator and is optional.
- Step 7.** Optionally, double click in the **Document** field to associate a reference document to the asset record. **Save** the record to return to the **Maintain Agreement Assets** form.
- Step 8.** Click the **Save** icon to create the new Agreement asset.
- Step 9.** Press the **Summary and History** button on the toolbar to review changes made to the asset record.

**NOTE:** Note the Initial Event and Added to Agreement Events. If the item changed source or classification, those events will be displayed as well.

## REMOVING AGREEMENT ASSET FINAL EVENTS

If an asset was retired in error and that deletion should not be reported, the final event may be removed from the item. We recommend that this process be done by Managers only, although clerks have the system authority to do so.

### NAVIGATION

- Click Agree
- Click Create Agreement Asset Final Events

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

**Final Events Section:**

- Date:** 12/20/2012 (with a calendar icon)
- Final Event:** A dropdown menu currently showing a yellow highlight.
- User Fields\*:** A text input field.
- Document\*:** A text input field.
- Comment:** A text input field.
- Generate DD1149:** A button located below the input fields.

**Assets Section:**

Ok	Identifier	Manufacturer / Model / Official Name*
<input type="checkbox"/>		

At the bottom of the window, there is a **Message** text input field.

**Step 1.** Navigate to the **Create Agreement Asset Final Events** screen.

**Step 2.** Press the **Find** button to enter query mode

**Step 3.** Specify the **Date** of the Agreement asset final event.

**Step 4.** Enter the event type from the list of values (LOV) from the **Asset Final Event** field for the inventory asset.

**Step 5.** Click the **Find** icon to search the database.

**Step 6.** Scroll through the final event records until locating the one with the asset that should not have been retired.

**Step 7.** Place cursor in the **Identifier** field for the asset that users want to reverse.

**Step 8.** Click the **Remove Record** icon to remove the indicated asset record.

**Step 9.** Click the **Save** icon to reinstate the selected asset.

**Step 10.** Press the **Summary and History** button on the toolbar to review changes made to the asset record.

**NOTE:** Note the Removed from Agreement and Final Event are no longer displayed on the Timeline. The Removed Final Event line is recorded to identify when the event was removed from the asset.

## WORKING WITH THE INACTIVE MODULE

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

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

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

- Agreement Asset Inactive Receival Request
- Withdraw Inactive Receival Request
- Request Inactive Asset Redeployment
- Withdraw Inactive Redeployment Requests

## AGREEMENT ASSET INACTIVE RECEIVAL REQUEST

Use the **Request Agreement Asset Inactive Receival** screen to initiate the storage process. The inactive receival screen provides the ability to either request the pickup and storage locations for an inactive asset or to store the asset in its current location. Additionally, use this screen to specify details such as the duration of storage, whether the asset may be used by others while stored, a recharge ID to charge against for any cost incurred to move and store an asset, unique requirements or general comments.

Scenario: The following graphic illustrates how to request to inactivate an asset, **0455**, a portable computer, for 6 months in a controlled environment. During the interim, this asset will be available to others for use.

### NAVIGATION

- Click Inactive
- Click Request Inactive Receival
- Click Request Agreement Asset Inactive Receival

The screenshot shows a web application window titled "Request Agreement Asset Inactive Receival - asin2120". The form is divided into two main sections: "Request Information" and "Assets".

**Request Information:**

- "Make inactive in-place?" checkbox is unchecked.
- "Pick-up Location \*" is an empty text field.
- "Deliver-to Location \*" contains the text "LIVERMORE\_BUILDING\_INACTIVE\_ROOM\_RCV".

**Assets:**

Ok	Δ	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0455	APPLE	M5555	COMPUTER PORTABLE

Below the table, the following fields are visible:

- "Request No" is 1496.
- "Inactive Type" is INACTIVE TYPE TEST (highlighted in yellow).
- "Available to others?" dropdown is set to Y.
- "Duration (yrs)" is an empty field.
- "Recharge Identifier" is an empty field.
- "User" is ADM09.
- "Last Name\*" is NINE.
- "First" is ADM.
- "Mid Init" is an empty field.
- "Unique Rqmts" is an empty text area.
- "Comment" contains the text "May be loaned out during inactive period."
- "Additional Information\*" is an empty text area.
- "Message" contains the text "Complete".

**Step 1.** Navigate to the **Request Agreement Asset Inactive Receival** screen.

**Step 2.** Enter the inactive request **Pick-up** and **Deliver-to** locations.

**Step 3.** Users have the option of making the inventory asset inactive but not moved to a storage facility by selecting the **Make inactive in-place?** checkbox. This checkbox also overrides the **Pick-up Location** and **Deliver-to Location** fields.

**Step 4.** In some cases, it may be more practical for users to store the inactive asset in a designated area that the organization can control according to the asset's requirements. Use the inactive in-place option to accommodate this type of business practice.

**Step 5.** Enter the asset identifier in the **Identifier** field for the item users are requesting an inactive receipt. The **Manufacturer**, **Model**, and **Official Name** fields automatically populate.

**NOTE:** The **Request No** (Number) is auto-generated upon saving. This number is used for tracking and reporting, and if required to withdraw the request.

**Step 6.** Use the **Inactive Type** field to select the type of storage required for the asset. Specify detailed storage instructions with the Unique Requirements text box below.

**Step 7.** Specify whether the asset is available for loan (**Y** for Yes or **N** for No) to others during its inactive period.

**Step 8.** Enter the duration of the asset's inactive period in the **Duration (yrs)** field. The length of the inactive period is designated in years (e.g, 0.5 = 1/2 year). This optional.

**Step 9.** Enter the account to charge storage and related costs for the inactivating the asset in the **Recharge Identifier** field.

**Step 10.** Specify any special considerations for the handling and storage of the asset (e.g. hazard, special storage needs, etc.) in the **Unique Rqmts** text box.

**Step 11.** Specify any general comments (e.g. pick up times, etc.) in the **Comment** text box.

**Step 12.** Click the **Save** icon to save the request. Notice the system generated request number. This number is used to complete the Agreement asset inactive receipt request later.

## WITHDRAW INACTIVE RECEIVAL REQUEST

Use the **Withdraw Inactive Receival Request** screen to withdraw a prior request to inactivate an asset. The user will need the **Request No (1496)** from our last example) that is obtained upon saving the Agreement asset inactive receival request in order to perform this action.

Scenario: The following graphic illustrates how to withdraw an inactive request. In this example, it is request number, **1496**, from the previous example.

### NAVIGATION

- Click Inactive
- Click Withdraw Inactive Receival

Ok Request No	Identifier	Manufacturer	Model	Official Name
<input type="checkbox"/> 1496	AGR 0455	APPLE	M5555	COMPUTER PORTABLE

Inactive Type: INACTIVE TYPE TEST

Available to others?  Y Duration (yrs)  Recharge Identifier

Pick-up Location: LIVERMORE\_BUILDING\_121\_ROOM\_101

Deliver-to Location: LIVERMORE\_BUILDING\_INACTIVE\_ROOM\_RCV

User: NINE ADM ADM09

Unique Requirements:

Comment: May be loaned out during inactive period.

Additional Information\*:

Message:

**Step 1.** Navigate to the **Withdraw Inactive Receival Request** screen.

**Step 2.** Enter the inactive request number that was generated when the original request was made to inactivate the asset in the **Request No** field. In this case, it is request number, **1496**. Click the Tab key to bring up the asset information.

**Step 3.** Click the **Save** icon to withdraw the inactive receival request.

## REQUEST INACTIVE ASSET REDEPLOYMENT

When a user locates an asset that they would like to use, a request for redeployment can be created and sent to the organization handling the inactive assets (e.g. warehouse or facilities management). The creation of a redeployment request notifies the appropriate party that the requested inactive asset has been changed to an active status and redeployed to the requestor for use during the predefined storage duration. This section will show users how to redeploy an inactive Agreement asset using the **Request Inactive Asset Redeployment** screen.

Scenario: The following graphic illustrates how to an inactive asset redeployment form for inactive asset **ASL-N3-10**, a car, that is requested to be delivered by the end of the month to Building **E**, Room **XX** in **Livermore**.

### NAVIGATION

- Click Inactive
- Click Request Inactive Asset Redeployment

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	ASL-N3-10	FORD MOTOR COMPANY	TAURUS	SEDAN

Request No: 1498

Comment: [Text Area]

Message: Complete

**Step 1.** Navigate to the **Request Inactive Asset Redeployment** screen.

**Step 2.** Specify the address for delivery of the asset that users want to redeploy by double-clicking in the **Location** field and entering the relevant information.

**Step 3.** Enter the asset identifier of the inactive asset that users want to redeploy in the **Identifier** field. Click the Tab key to populate **Manufacturer**, **Model**, and **Official Name**.

**Step 4.** Use the **Comment** text box to specify any special circumstances or delivery considerations.



Step 5. Click the **Save** icon to save the redeployment request. The system generates a redeployment **Request No** (Number).

## WITHDRAW INACTIVE REDEPLOYMENT REQUESTS

Use the **Withdraw Inactive Redeployment Request** screen to withdraw a request to re-use an inactive asset.

Scenario: The following graphic illustrates how to issue a redeployment withdrawal request for asset **ASL-N3-10**, a car using the request number, **1498**, generated from the initial redeployment request.

### NAVIGATION

- Click Inactive
- Click Withdraw Inactive Redeployment Request

Ok Request No	Identifier	Manufacturer	Model	Official Name
<input type="checkbox"/> 1498	INA ASL-N3-10	FORD MOTOR COM	TAURUS	SEDAN

Deliver-to Location: LIVERMORE\_BUILDING\_E\_ROOM\_XX

Comment: [Empty text area]

Message: [Empty text field]

**Step 1.** Navigate to the **Withdraw Inactive Redeployment Request** screen.

**Step 2.** Enter the request number (**1498**) from the original Inactive Asset Redeployment Request in the **Request No** field.

**Step 3.** Click the **Tab** key to populate the screen.

**Step 4.** Click the **Save** icon to withdraw the request.

## WORKING WITH THE EXCESS MODULE

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

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

This section discusses how to:

- Request Agreement Asset Excess Receival
- Withdraw Agreement Asset Excess Receival

## REQUEST AGREEMENT ASSET EXCESS RECEIVAL

Excess receival requests enable users who do not have the authority to directly create an excess asset to request an asset for disposal. Recall that users can only work with assets that are a part of the organization(s) to which they belong to or that they are authorized to work with. An authorized user can create an excess receival request and a manager that oversees the disposal of assets for the organization can generate the excess assets from the receival request.

Scenario: The following graphic illustrates how to create an excess asset receival request for Agreement asset **0456**, a portable computer. The computer is used but in good condition and should be picked up from its current location in **Livermore**, Building **E**, Room **07** and sent to an excess warehouse in **Livermore**, **Excess** Building, Room **RC**.

### NAVIGATION

- Click Excess
- Click Request Excess Receival
- Click Request Agreement Asset Excess Receival

Ok	Δ	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0456	APPLE	M5555	COMPUTER PORTABLE

Request No: 1499

Asset Condition: 4 USED - GOOD

Comment: [Empty]

Additional Information\*: [Empty]

Message: Complete

**Step 1.** Navigate to the **Request Agreement Asset Excess Receival** screen.

Step 2. Select one of the following:

- **Excess in-place?** checkbox if users want the asset to remain in its current location but in the Excess state. Selecting this option overrides the **Pick-up Location** and **Deliver-to Location** required fields.
- **Pick-up Location** of the asset that users want to excess by double-clicking in the **Location** field and entering the relevant information (shown in the figure above). Also specify the **Deliver-to Location** of the asset that users want to excess by double-clicking in the **Location** field and entering the relevant information.

Step 3. Enter the asset identifier of the inventory asset that users want to excess in the **Identifier** field. Click the Tab key to populate **Manufacturer**, **Model**, and **Official Name**.

Step 4. Select the asset condition that best describes the asset's current state.

Step 5. Use the **Comment** text box to specify any special circumstances or delivery considerations.

Step 6. Click the **Save** icon to save the redeployment request. The system generates a redeployment **Request No** (Number).

## WITHDRAW AGREEMENT ASSET EXCESS RECEIVAL

Once users have made a request to excess an asset, users can withdraw the request as long as the assets has not been converted to an excess asset. Use the **Withdraw Excess Receival Request** screen to withdraw a request to excess an asset. To withdraw a request users must use the request number generated for the excess receival.

Scenario: The following graphic illustrates how to withdraw an excess receival request, for the Agreement asset **0456** using the generated request number, **1499**, generated when the excess receival request was created.

### NAVIGATION

- Click Excess
- Click Withdraw Excess Receival Request

The screenshot shows a web application window titled "Withdraw Excess Receival Request - asmn2120". The main content area is titled "Requests" and contains a table with the following data:

Ok Request No	Identifier	Manufacturer	Model	Official Name
<input type="checkbox"/> 1499	AGR 0456	APPLE	M5555	COMPUTER PORTABL

Below the table, there are several input fields:

- Asset Condition: 4 (USED - GOOD)
- Pick-up Location: LIVERMORE\_BUILDING\_E\_ROOM\_07
- Deliver-to Location: LIVERMORE\_BUILDING\_EXCESS\_ROOM\_RC
- Comment: (empty)
- Withdraw Reason: Entered in by mistake. (highlighted in yellow)
- Additional Information\*: (empty)
- Message: (empty)

**Step 1.** Navigate to the **Withdraw Excess Receival Request** screen.

**Step 2.** Enter the request number, **1499** in the **Request No** field.

**Step 3.** Click the **Tab** key to populate the screen.

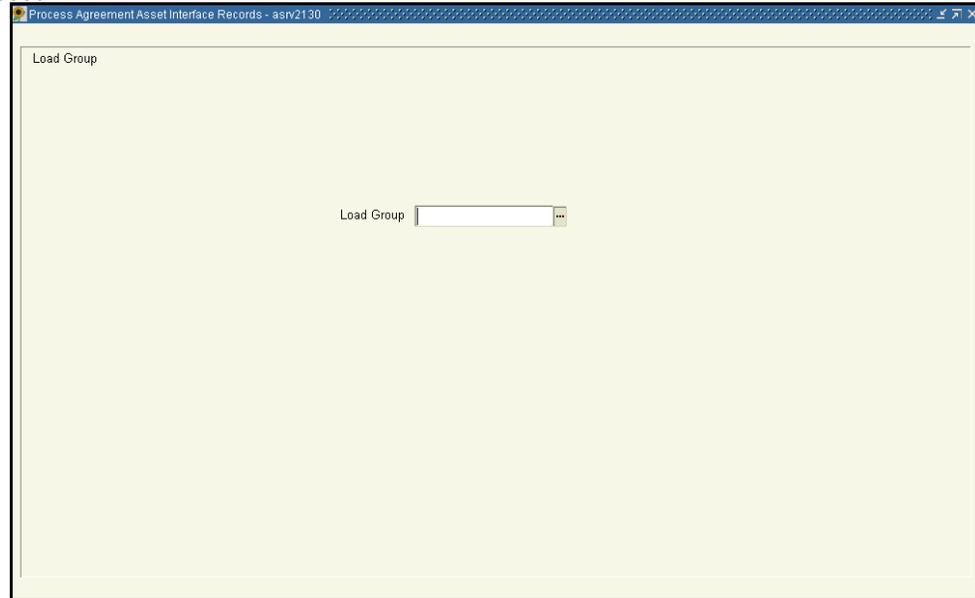
**Step 4.** Click the **Save** icon to withdraw the request.

## PROCESS AGREEMENT ASSET INTERFACE RECORDS

Use the **Process Agreement Asset Interface Records** screen to load data to the interface tables.

### NAVIGATION

- Click Agree
- Click Process Agreement Asset Interface Records



The screenshot shows a web browser window titled "Process Agreement Asset Interface Records - asrv2130". The main content area has a light yellow background. At the top left, the text "Load Group" is displayed. In the center of the page, there is a label "Load Group" followed by a text input field and a small icon with three dots.

**Step 1.** Navigate to the **Process Agreement Asset Interface Records** form.

**Step 2.** Select the **Load Group** to be processed from the list of values.

**Step 3.** Press the **Save** icon to process the load group.

## EDIT AGREEMENT ASSET INTERFACE RECORDS

After interface records have been processed, use the **Edit Agreement Asset Interface Records** screen to move data from the interface tables to the Agreement asset record tables and to correct any errors that occur while attempting to load assets created with an Interface.

### NAVIGATION

- Click Agree
- Click Edit Agreement Asset Interface Records

The **Edit Agreement Asset Interface Records** screen displays the information that was entered by using the load interfaces. However, the information may require validation and corrections before the data can move from the interface tables to the asset record tables.

After reviewing the data, Click the **Save** icon to commit the record and determine if the load was successful or if the record requires further edits.

## REVIEWING ERRORS IN THE INTERFACE TABLES

Invalid data from the interface tables *cannot* be loaded into the asset record tables until the data is corrected. Review the error messages and edit the data accordingly.

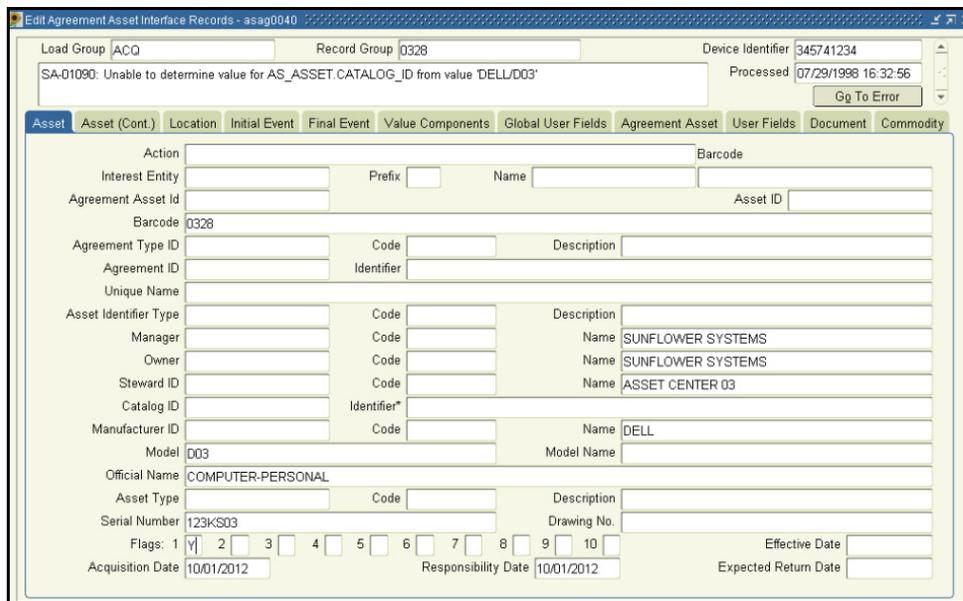
The screenshot shows a software window titled "Edit Agreement Asset Interface Records - asag0040". At the top, there are input fields for "Load Group" (ACG), "Record Group" (0328), and "Device Identifier" (345741234). Below these is an error message: "SA-01090: Unable to determine value for AS\_ASSET.CATALOG\_ID from value 'DELL/D03'". To the right of the error message is a "Processed" timestamp (07/29/1998 16:32:56) and a "Go To Error" button. A tabbed interface is visible with tabs for "Asset", "Asset (Cont.)", "Location", "Initial Event", "Final Event", "Value Components", "Global User Fields", "Agreement Asset", "User Fields", "Document", and "Commodity". The "Asset" tab is active, displaying a form with various fields:

- Action: [ ] Barcode: [ ]
- Interest Entity: [ ] Prefix: [ ] Name: [ ]
- Agreement Asset Id: [ ] Asset ID: [ ]
- Barcode: 0328
- Agreement Type ID: [ ] Code: [ ] Description: [ ]
- Agreement ID: [ ] Identifier: [ ]
- Unique Name: [ ]
- Asset Identifier Type: [ ] Code: [ ] Description: [ ]
- Manager: [ ] Code: [ ] Name: SUNFLOWER SYSTEMS
- Owner: [ ] Code: [ ] Name: SUNFLOWER SYSTEMS
- Steward ID: [ ] Code: [ ] Name: ASSET CENTER 03
- Catalog ID: [ ] Identifier\*: [ ]
- Manufacturer ID: [ ] Code: [ ] Name: DELL
- Model: D03 Model Name: [ ]
- Official Name: COMPUTER-PERSONAL
- Asset Type: [ ] Code: [ ] Description: [ ]
- Serial Number: 123KS03 Drawing No.: [ ]
- Flags: 1  2  3  4  5  6  7  8  9  10
- Acquisition Date: 10/01/2012 Responsibility Date: 10/01/2012 Effective Date: [ ]
- Expected Return Date: [ ]

**CORRECTING ERRORS IN THE INTERFACE TABLES**

Use the **Edit Agreement Asset Interface Records** screen to correct any errors that occur while attempting to move data from the interface tables to the asset records tables. The following example tells us that at least one error is preventing the data from loading to the asset records tables. If one has trouble spotting the error on this screen, click the **Go To Error** button and the cursor displays in the field requiring an edit. Update the information accordingly. If there are multiple errors for an asset record, scroll through the error messages by clicking the **Next Record** icon to review all of the error messages.

Click through the tabs to view additional interface table data.



## PROCESS AGREEMENT ASSET PO INTERFACE RECORDS

The following table defines the purpose of each field on the **Process Agreement Asset PO Interface Records** screen.

### Process Agreement Asset PO Interface Records Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
<b>Cmpl?</b>	The Cmpl? (completed) flag is used to denote POs whose processing, in regards to allocating assets, is complete. Check the Cmpl? box and save to indicate that the processing of the highlighted PO is complete. Users cannot select PO Line Items from a PO marked as complete. If one wishes to modify a completed PO, uncheck the Cmpl? box. Completed records get sorted last in a query.
<b>NP</b>	If users want to indicate that all of the line items (Item #) for the selected PO are non-property, check the NP box in the Purchase Orders block and all of the Item #s in the PO Items Detail block will be marked as non-property (NP). If users check a PO Identifier as NP, users cannot allocate any of the PO Items from that PO. If users mark a particular Item # as NP, users cannot select that particular PO Item for allocation. If users wish to change the non-property status of the PO or PO Item, uncheck the NP box. Non-property POs are sorted last when users query for POs.
<b>PO Identifier</b>	The purchase order identifier containing property items waiting to be allocated.
<b>PO Item Details</b>	
<b>NP</b>	Non-property line item. Users cannot allocate non-property line items.
<b>Item #</b>	Line item number of the selected purchase order.
<b>Description</b>	Description of the selected line item.
<b>Quantity Ordered</b>	The quantity ordered for the selected line item.
<b>Quantity Recv'd</b>	The quantity received for the selected line item.
<b>Quantity Assets</b>	The quantity assigned as assets for the selected line item.
<b>UoM</b>	Unit of Measure for the selected line item.
<b>Price</b>	The price per unit of the selected line item.
<b>Label 1 - 30</b> <b>Value 1 -30</b>	There are up to 30 value and label combinations that users can define to meet the purchasing system requirements and practices. These 30 sets of name/value pairs reside in the following three tables - AS_PO_HEADERS, AS_PO_ITEMS and AS_PO_SUB_ITEMS. Each pair consists of a label column and a value column. Users can define their own names for each field and its associated value. Users can define their own code in the user-defined <a href="#">as_po_interfaceu</a> package procedures to examine these values and determine if users want to store them in the user-defined fields of the purchase order, the asset value component, or the asset initial event.

## EDIT ASSET VALUE COMPONENT INTERFACE RECORDS

### NAVIGATION

- Click Agree
- Click Edit Asset Value Component Interface Records

**Step 1.** Navigate to the **Edit Asset Value Component Interface Records** form.

**Step 2.** Press the **Find** (Flashlight) icon to view the available Load Groups. Use up and down arrow keys to select appropriate **Load Group**.

**Step 3.** View and correct the errors accordingly.

**NOTE:** If one has trouble spotting the error on this screen, click the **Go To Error** button and the cursor displays in the field requiring an edit. Update the information accordingly.

**NOTE:** If there are multiple errors for an asset record, scroll through the error messages by clicking the **Next Record** icon to review all of the error messages.

**Step 4.** Click the **Save** icon to commit the record and determine if the load was successful or if the record requires further edits.

## AGREEMENT REPORTS

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

There are several output options available for reports.

- PDF (Adobe Acrobat)
- HTML
- Text

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

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

### **Agreement Assets Report**

The **Agreement Assets** report shows the details of assets associated with Agreements, (e.g. leases, warranties and grants).

### **Agreement Assets (Global Information) Report**

The **Agreement Assets (Global Information)** report shows detail and summary information of assets associated with an Agreement. Use the **Agreement Assets (Global Information)** report to display Agreement details as well as all assets associated with an Agreement.

### **Agreement Activity Report**

The **Agreement Activity** report is used to show a summary of additions and deletions, for a time period, for one or more Agreements. users can search for and retrieve summary activity reports for assets in numerous ways. For example, if users are responsible for multiple Agreements, users can generate a report that displays the summary activity for assets associated with respective Agreements and more.

### **Agreement Additions and Deletions**

The **Agreement Additions and Deletions** report shows the details of asset additions and deletions, for a time period, for one or more Agreements. Use the **Agreement Additions and Deletions** report to view assets that have been added or deleted to an Agreement over a period of time.

### **Agreement Asset Activity Summary by Asset Flag**

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

### **Agreement Asset Activity Summary by Asset Type**

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

### **Agreement Asset Interface Processing Results**

The **Agreement Asset Interface Processing Results** report shows the results of processing the contents of AS\_LOAD\_Agreement\_ASSETS interface table.

### **Agreement Asset Ongoing Events**

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

### **Agreement Asset Summary by Asset Flag**

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

### **Agreement Asset Summary by Asset Type**

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

### **Agreement Asset Utilization**

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

### **Asset Search Report**

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

**Purchase Order Aging Report**

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

**Agreement Asset Initial Events Report**

The **Agreement Asset Initial Events** report shows the details of accountable asset initial events (e.g. lease, loan and subject to agreement).

**Agreement Asset Final Events Report**

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

**Agreement Asset Timeline Report**

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

**Agreement Listing Report**

The **Agreement Listing** report displays the details of agreements.

**Asset Structure Report**

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

**Asset Structure by Configured Totals Report**

The **Asset Structure by Configured Totals** report shows parent/child relationships between assets and the value of the individual components and parent structure.

**Events on Agreements Report**

The **Events on Agreements** report displays details of business events for agreement assets for a time period.