6

INACTIVE ASSETS

Inactive asset management is the field of asset management overseeing assets that are in storage. The Inactive Assets chapter defines the process of converting an asset into an inactive asset, discusses the activities of users who manage the inactive assets portion of the asset lifecycle and addresses the steps required to re-utilize and redeploy inactive assets.

KEY CONCEPTS

This chapter includes the following discussion points and concepts:

- About Inactive Assets
- Inactive Roles
- Inactive Receival Requests
- Create Inactive Assets
- Manage Inactive Assets
- Re-Utilize Inactive Assets
- Excess Inactive Assets
- Retire Inactive Assets
- Inactive Reports

ABOUT INACTIVE ASSETS

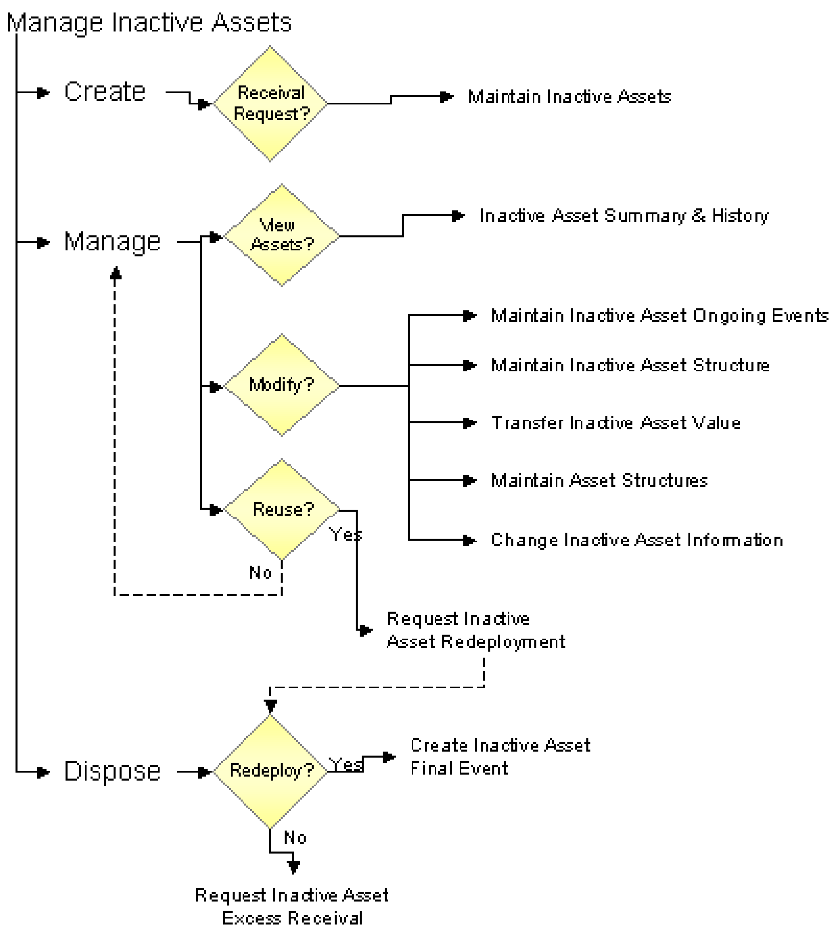
The Inactive module enables users to create and manage assets that are currently not in-use or that users want to designate for storage. This chapter starts by looking at:

- Inactive receival requests
- Inactive asset reports
- Inactive assets creation from inactive receival requests.

Additionally, this chapter demonstrates how to manage inactive assets throughout the storage period and the process for returning inactive assets to service or disposal of inactive assets from storage.

INACTIVE MODULE WORKFLOW

The Inactive module handles the following primary functions: creation, management, and disposal of assets. The workflow diagram below depicts this process based on the menu items found within the inactive module to help users obtain the desired objectives.



INACTIVE 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 users have to manage the 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 process.

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 Inactive module.

The Inactive module roles include Inactive Managers and Inactive Clerks. Depending upon the organizational structure, users may find that in a small or centralized organization, organizations assign most of the users as managers responsible for performing all or many of the tasks related to property storage management with a small number of users assigned as Inactive Clerks to carry out the daily business process.

For more information about Sunflower application roles, see the Roles chapter in the Sunflower Enterprise 5.0 User Guide.

INACTIVE MENU ACCESS

When assigning roles, 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 Inactive module based upon the related Inactive module roles.

	ROLE		
MENU ITEM	INACTIVE MANAGER	INACTIVE CLERK	ACR
Maintain Inactive Assets	Yes	Yes	--
Inactive Asset Summary and History	Yes	Yes	Yes
Manage Material	Yes	Yes	--
Asset Search	Yes	Yes	Yes
Material Search	Yes	Yes	Yes
Maintain Catalog Entries*	--	--	--
Change Inactive Asset Information	Yes	Yes	--
Transfer Inactive Asset Value	Yes	Yes	--
Maintain Inactive Asset Ongoing Events	Yes	Yes	--
Create Inactive Asset Final Events	Yes	Yes	--
Edit Inactive Asset Interface Records	Yes	Yes	--
Edit Material Asset Interface Records	Yes	Yes	--
Process Inactive Asset Interface Records	Yes	Yes	--
Process Inactive Asset PO Interface Records	Yes	Yes	--
Edit Asset Value Component Interface Records	Yes	Yes	--
Request Inactive Receival	--	--	Yes
Withdraw Inactive Receival Request	--	--	Yes
Deny Inactive Receival Request	Yes	Yes	--
Request Inactive Asset Redeployment	Yes	Yes	Yes
Withdraw Inactive Redeployment Requests	Yes	Yes	Yes
Maintain Asset Structures	Yes	Yes	Yes
Search Map	Yes	Yes	Yes
Inactive Reports	Yes	Yes	Yes

NOTE: Inactive Clerks and Managers have access to the **Maintain Catalog Entries** screen if organizations assign them the AS_CATALOGER role.

INACTIVE MANAGER VS. INACTIVE CLERK

Based on the table above, both roles have virtually the same type of access within the Inactive module. The difference between the two roles is only apparent when taking into account the organizational structure. The Inactive Manger has access to and can manipulate (create, update, or retire) inactive assets throughout the organization. On the other hand, the Inactive Clerk has the same capabilities as that of the Inactive Manager but only for the organization for which the clerk has an assigned responsibility.

INACTIVE RECEIVAL REQUESTS

From Sunflower's perspective, any asset may be stored as inactive by first creating a request to a person/ group (e.g. inactive department, warehouse, etc.) to turn an active asset into an inactive asset. In other words, users are transferring the responsibility of the asset to another group.

Creation of an inactive asset is a two-part process performed by an individual in the steward organization (e.g. Inventory Clerk or ACR) and an Inactive Clerk. For example, if the ACR is performing the activity, the first step in the process is to create an inactive receival request. After creating the request, an Inactive Manager can create the inactive asset from the inactive receival request. An asset cannot become an inactive asset until the inactive receival request is accepted, however; if this function is performed by an Inactive Manager, then an active asset may be converted to an inactive asset directly and by-pass the request process.

In addition, there are times when users may want to store an asset for later use. The asset may be a new asset that has been purchased and designated for a project that is not yet ready to utilize the asset. This asset may require special storage that can be better handled by the inactive asset organization such as a warehouse management facility. Alternatively, an asset could be used and in good condition but the organization has no current use for the asset. By sending the used asset to an inactive storage facility, users give the entire enterprise the opportunity to search for and request the transfer of non-utilized assets to their organization and put to use for another project that supports the goals of the entire enterprise. In order to assure that the assets have proper storage and can be made available when needed, users can request that the assets be placed in an inactive mode and stored under the proper conditions.

Sunflower provides the Inactive module to handle inactive asset requests for Agreement Assets, Inventory Assets, Financial Assets and Excess Assets. This section covers inactive receival requests.Specifically, how to:

- Create Inactive Receival Requests
- Withdraw Inactive Receival Requests
- Accept Inactive Receival Requests
- Deny Inactive Receival Requests

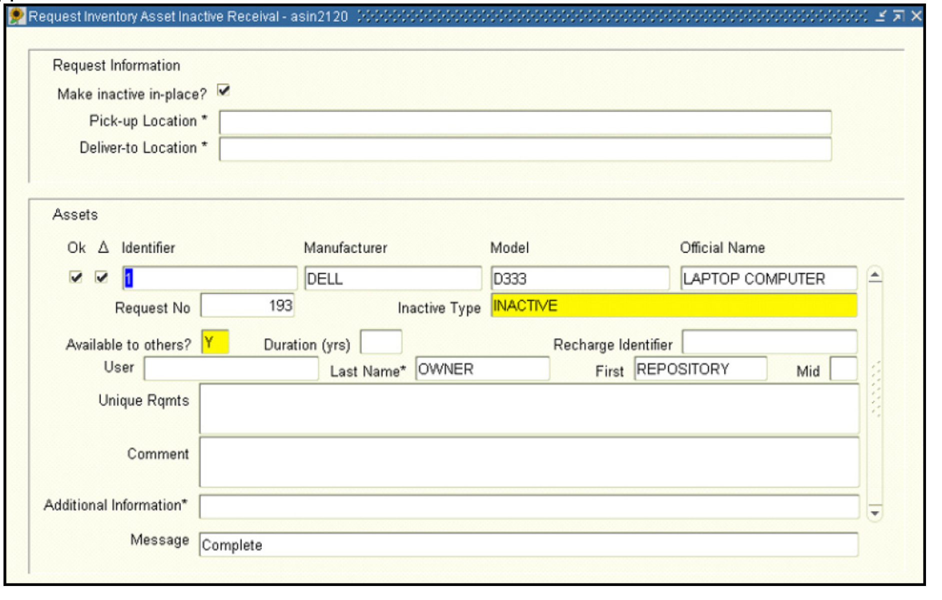
CREATE INACTIVE RECEIVAL REQUESTS

A change in accountability is a two-part process that is only complete when the requested party accepts the change/transfer request. The transfer of assets is a transfer of responsibility that takes place through a handshake process known as a request and acceptance of an asset. If a request for transfer is made, the requested steward can either accept or deny the transfer of the assets in question.

Scenario: The following graphic illustrates how to create an inactive asset by using an inactive receival request. Later on in this chapter, users will learn how to accept an inactive receival request to create an inactive asset. Inventory Asset, **XX04**, will not be needed by the organization for at least the next 6 months. As a result users have decided to store it in a warehouse. Any charges required in collecting and shipping to the warehouse should bill to account **A11201**. The asset should be kept dry and may not be used by other interested individuals.

NAVIGATION

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



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

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

NOTE: Users have the option of making the inventory asset inactive without moving the asset to a storage facility by selecting the **Make inactive in-place?** checkbox. This checkbox also overrides the **Pick-up Location** and **Deliver-to Location** fields.

NOTE: 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 **Make inactive in-place** option to accommodate this type of business practice.

Step 3. Enter the asset identifier in the **Identifier** field for the item users are requesting.

Step 4. The **Manufacturer**, **Model**, and **Official Name** fields auto-populate.

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

Step 5. Use the **Inactive Type** field to select the type of storage required for the asset.

NOTE: Users can specify detailed storage instructions with the **Unique Requirements** text box below.

Step 6. Specify whether the asset is available for loan (**Y** for Yes or **N** for No) to others during its inactive period.

Step 7. Enter the duration of the asset's inactive period in the **Duration (yrs)** field. The length of the inactive period is designated in years (e.g, 0.5 = 1/2 year).

Step 8. Enter the account to charge storage and related costs for inactivating the asset in the **Recharge Identifier** field.

Step 9. 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 10. Specify any general comments (e.g. pick up times, etc.) in the **Comment** text box.

Step 11. Enter **Additional Information*** by double clicking on the complex field. Click **Save** to return to the **Request Inventory Asset Inactive Receival** screen.

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

NOTE: Notice the system generated request number. This number will be used to complete the inventory asset inactive receival request later.

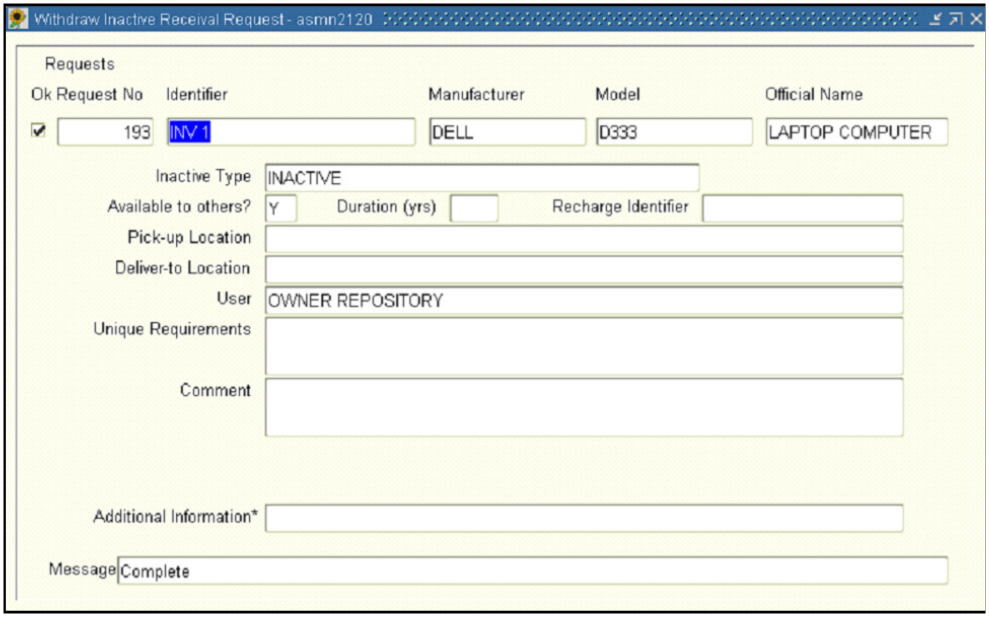
WITHDRAW INACTIVE RECEIVAL REQUESTS

Use the **Withdraw Inactive Receival Request** screen to withdraw a prior request to inactivate an asset. The user will need the **Request No** (request number) that was obtained upon saving the **Inventory Asset Inactive Receival** request in order to perform this action.

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

NAVIGATION

- Click Inactive
- Click Withdraw Inactive Receival



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

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

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

ACCEPT INACTIVE RECEIVAL REQUESTS

Use the **Maintain Inactive Assets** screen to create inactive assets based upon the inactive asset receival requests. This is the second part of the two-part process for creating an inactive asset from another interest asset. The following example illustrates how to create an inactive asset based on an inactive receival request. Notice that this screen is similar to the **Maintain Inventory Assets** screen. The distinction is that users are creating a new inactive asset from an existing inventory asset. In order to create an inactive asset, the following information is needed:

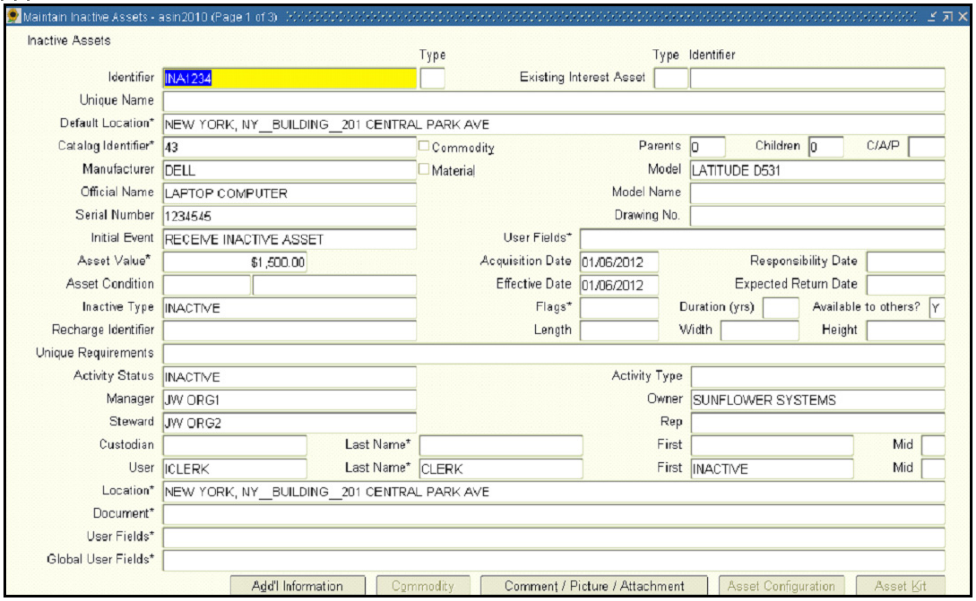
- New identifier for the inactive asset
- Request # (number)
- Existing interest asset type and identifier

The **Asset Request Number** and the interest asset identifier can be found on the **Excess/Inactive Receival Form** report. Use either piece of information from the report to retrieve the pending inactive assets.

Scenario: Use the **Asset Request Number** generated from the inactive receival request to create an inactive asset.

NAVIGATION

- Click Inactive
- Click Maintain Inactive Assets



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

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

NOTE: This new identifier can be the same identifier as that of the existing asset identifier.

NOTE: The new inactive asset identifier is based upon the business processes and procedures.

Step 3. Specify the **Existing Interest Asset Type** as **ASR**. (Asset Request)

Step 4. Enter the **Asset Request Number**.

NOTE: The **ASR** number was created during the receival request process. Click the Tab key to display the asset's information. Alternatively, users that are assigned the Inactive Manager role can create inactive assets using this screen without using the request process by specifying the existing interest asset type (e.g. inventory, agreement, etc.) and their respective identifier.

Step 5. Enter the appropriate information in the following fields to add the inactive interest asset-specific information:

- **Inactive Type** -- indicates what type of inactive status to assign to the asset.

- **Available to others?** -- indicates if the asset can be used by others while in its inactive status.
- **Length/Width/Height** -- indicates the asset's dimensions for storage purposes.
- **Recharge Identifier** -- indicates the identifier assigned to the recharge general ledger account.
- **Unique Requirements** -- indicates any unique storage requirements for the asset.

Step 6. Update the new inactive asset's information, as needed. (e.g. **Asset Condition** as **USED - GOOD**. **Location** updates etc.)

Step 7. Click the **Save** icon to save the inactive asset record.

NOTE: If a value is not entered in a required field, Sunflower prompts the user to do so.

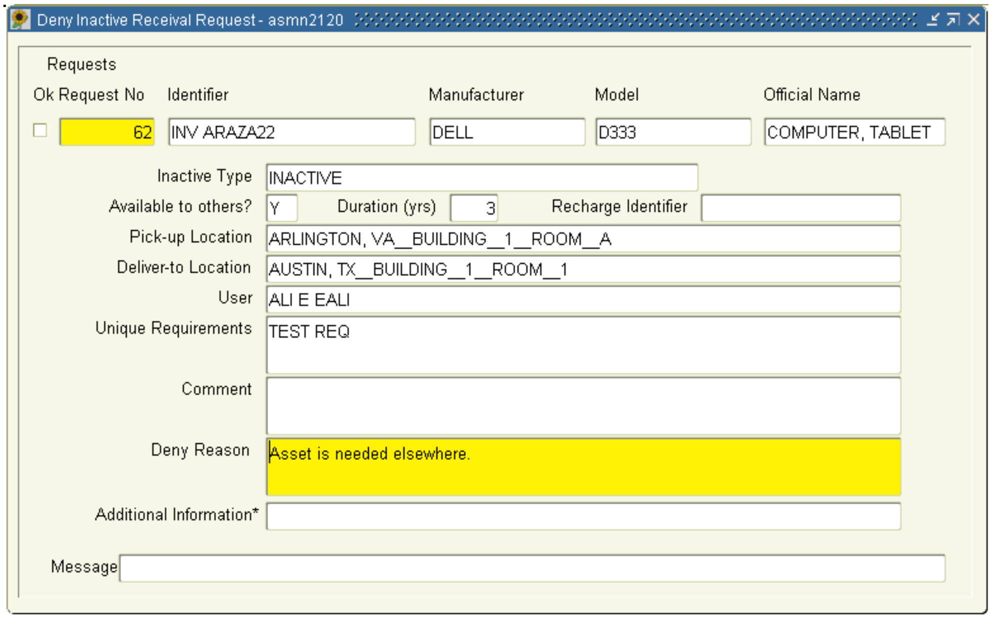
DENY INACTIVE RECEIVAL REQUESTS

In addition to accepting receival requests, users can also deny receival requests. Use the **Excess/Inactive Receival Form** report to determine if there are any outstanding requests for excess or inactive asset transfers to the organization.

Scenario: The following graphic illustrates how to use the Deny Inactive Receival Request screen to deny the inactive receival request number, **62**, to store a computer, tablet, because the property is needed elsewhere.

NAVIGATION

- Click Inactive
- Click Deny Inactive Receival Request



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

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

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

NOTE: Depending upon how the system is configured, denial transactions may or may not require a Deny Reason.

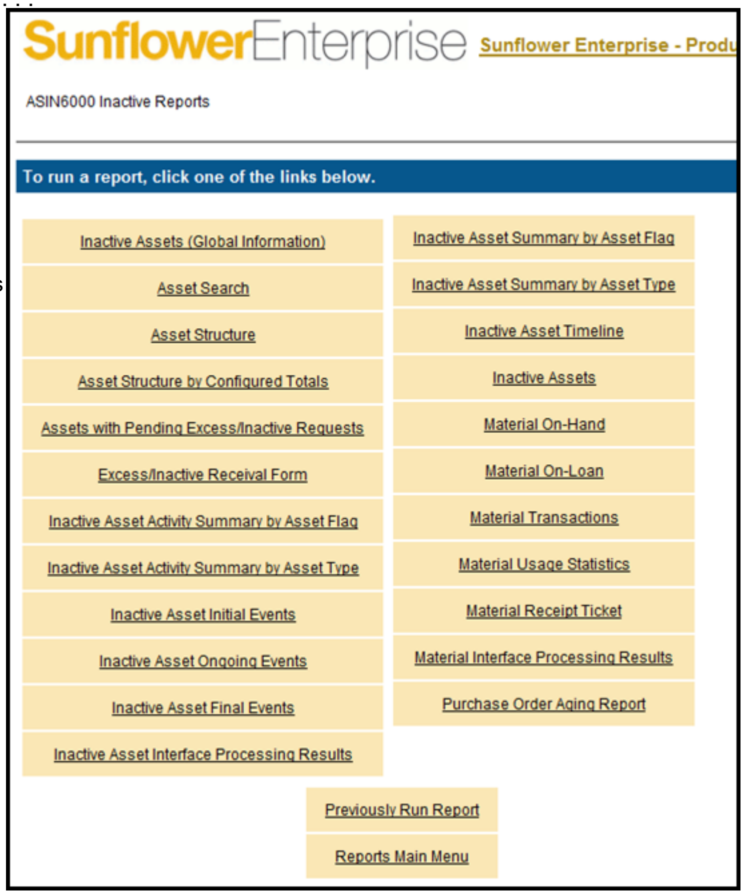
Assets with Pending Excess/Inactive Requests Report

The **Assets with Pending Excess/Inactive Requests** report enables users to review pending inactive and excess asset receival requests that are awaiting review and approval.

Use the **Assets with Pending Excess/Inactive Requests** report to check for pending requests. To run a report, perform the following:

Navigation

- Click Inactive
- Click Inactive Reports
- or...
- Click Reports
- Click Inactive Reports
- Click Assets with Pending Excess/Inactive Requests



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

Step 2. Click the **Assets with Pending Excess/Inactive Requests** report.

ASSETS WITH PENDING EXCESS/INACTIVE REQUESTS REPORT PARAMETERS

The following report parameters were used to generate the report.

ASSETS WITH PENDING EXCESS/INACTIVE REQUESTS REPORT OUTPUT

Review the **Assets with Pending Excess/Inactive Requests** report output to determine if there are any outstanding excess or inactive requests for the property storage organization.

The report output includes the following:

- Report title page and summary of criteria used to create the report.
- Report details (pay special attention to the Request Number and the Identifier).
- End of report page.
- This report is also available in Txt output format.

Report Output

```
Sunflower Enterprise            Assets With Pending Excess/Inactive Requests                 Page 2 of 8
ASMN6100                                                                                05/22/2006 16:18

Request No Identifier          Flags     Official Name   Manufacturer     Model      Serial Number         Asset Value

      1063 INV 0151                      COMPUTER MINI   HEWLETT-PACKARD  9000       98701            $        3,900.00

   Asset Condition :
           Steward : SUNFLOWER SYSTEMS                             Request : INACTIVE RECEIVAL          - 08/21/1998
         Custodian : FRAZIER KRISTEN S 020866                    Requester : OWNER REPOSITORY
              User :                                       Requester Phone :
  Pick-up Location : LIVERMORE                          Deliver-to Location : LIVERMORE
                     BUILDING : G   ROOM : 200                               BUILDING : INACTIVE   ROOM : RCV

      1064 INV 0251                      COMPUTER MINI   HEWLETT-PACKARD  9000       98702            $        3,900.00

   Asset Condition :
           Steward : SUNFLOWER SYSTEMS                             Request : INACTIVE RECEIVAL          - 08/21/1998
         Custodian : FRAZIER KRISTEN S 020866                    Requester : OWNER REPOSITORY
              User :                                       Requester Phone :
  Pick-up Location : LIVERMORE                          Deliver-to Location : LIVERMORE
                     BUILDING : G   ROOM : 200                               BUILDING : INACTIVE   ROOM : RCV

      1065 INV 0351                      COMPUTER MINI   HEWLETT-PACKARD  9000       98703            $        3,900.00

   Asset Condition :
           Steward : SUNFLOWER SYSTEMS                             Request : INACTIVE RECEIVAL          - 08/21/1998
         Custodian : FRAZIER KRISTEN S 020866                    Requester : OWNER REPOSITORY
              User :                                       Requester Phone :
  Pick-up Location : LIVERMORE                          Deliver-to Location : LIVERMORE
                     BUILDING : G   ROOM : 200                               BUILDING : INACTIVE   ROOM : RCV

      1066 INV 0451                      COMPUTER MINI   HEWLETT-PACKARD  9000       98704            $        3,900.00

   Asset Condition :
           Steward : SUNFLOWER SYSTEMS                             Request : INACTIVE RECEIVAL          - 08/21/1998
         Custodian : FRAZIER KRISTEN S 020866                    Requester : OWNER REPOSITORY
              User :                                       Requester Phone :
  Pick-up Location : LIVERMORE                          Deliver-to Location : LIVERMORE
                     BUILDING : G   ROOM : 200                               BUILDING : INACTIVE   ROOM : RCV
```

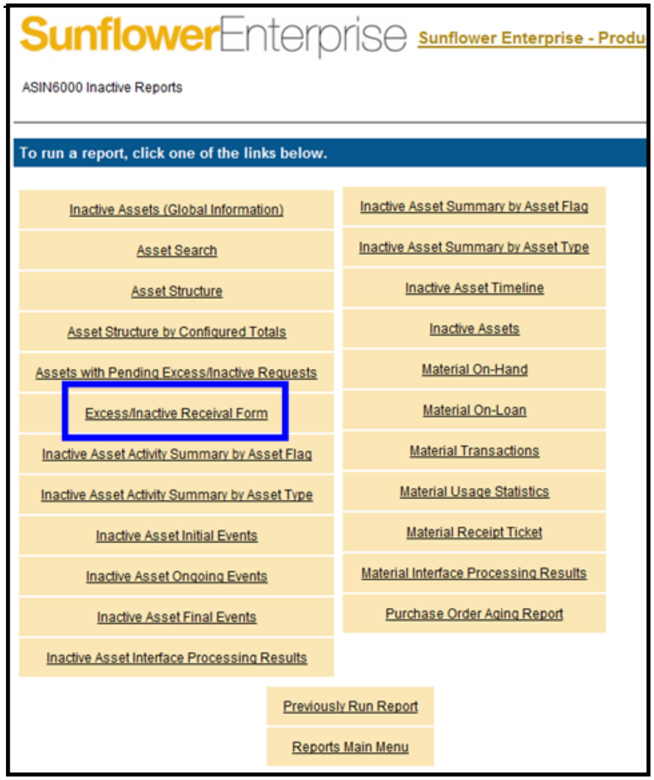
EXCESS/INACTIVE RECEIVAL FORM

The **Excess/Inactive Receival Form** report prints a generic form, with a barcode, that can be used for excess and inactive asset pick-up. This form also tells users if there are any outstanding excess or inactive requests for the property storage organization.

Use the **Excess/Inactive Receival Form** report to print the form for excess and inactive asset pick-up. To print the form, perform the following:

NAVIGATION

- Click Inactive
- Click Inactive Reports
- or...
- Click Reports
- Click Inactive Reports
- Click Excess/Inactive Receival Form

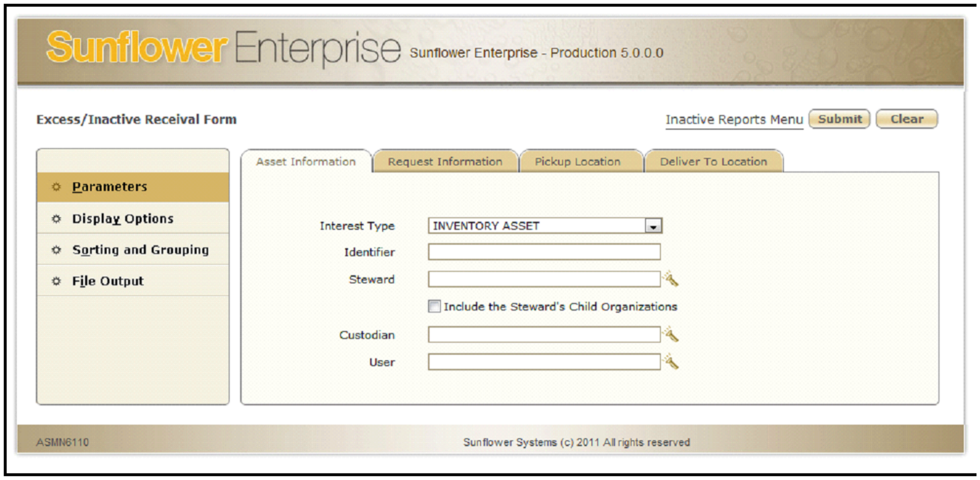


Step 1. Select either **Inactive > Inactive Reports** or **Reports > Inactive Reports**.

Step 2. Click the **Excess/Inactive Receival Form**.

Assets with Excess/Inactive Receival Form Report Parameters

The following report parameters were used to generate the report.



EXCESS/INACTIVE RECEIVAL FORM REPORT OUTPUT

Review the **Excess/Inactive Receival Form** report output to determine if there are any outstanding requests for excess or inactive asset transfers to the organization. The following report reveals several assets that have been requested for transfer to the inactive organization.

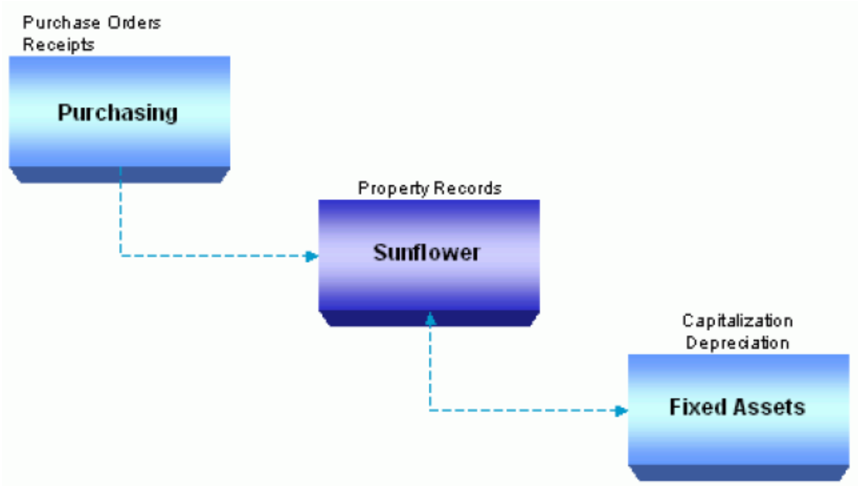
```
Sunflower Enterprise                    Excess Receival Form
ASMN6110                                                              01/25/2012 15:50

  Request No : 121
   Requester : FELDMAN BENJAMIN N BFELDMAN               Phone :
        date : 01/05/2012                      Alternate Phone :

  Identifier : INV BFELDMAN07
Manufacturer : NICOLAS ORG                           Model: LAPTOP
    Official : LAPTOP                           Asset Type: LAPTOP
        Name
    Quantity :                                         UoM:
 Description :
      Serial :                                      Value:  $        10,000.00
      Number
       Flags :                            Acquisition Date: 12/28/2011
     Manager : JSF MANAGER                           Owner: SUNFLOWER SYSTEMS
     Steward : JSF CHILD STEWARD                       Rep:
   Custodian :                                       Phone:
                                           Alternate Phone:
   Condition : SCRAP

   Pick-up Location                      Deliver-to Location
   ARLINGTON, VA                         EXCESS WAREHOUSE
    :      :                              :      :

              Comment : comment
```

CREATE INACTIVE ASSETS

Sunflower simplifies the process of creating and maintaining assets for the organization. As an asset management professional, users will often find the need to add individual assets to the property management system of record. Sunflower provides several screens and interfaces that simplify the process of adding individual assets (with or without purchase order information), updating asset information and transferring assets to and from the organization. Whether creating a simple asset from scratch, a composite asset from multiple purchase orders, or if users need to create multiple inactive assets at once from a single purchase order line, Sunflower enables users to complete these and similar transactions with the Inactive module. In this section, users will learn how to inactivate asset records using the following methods:

- Create Inactive Assets From Inactive Receival Requests
- Create Inactive Assets From Scratch (Maintain Inactive Assets screen)
- Mass Asset Creation

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



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

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

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

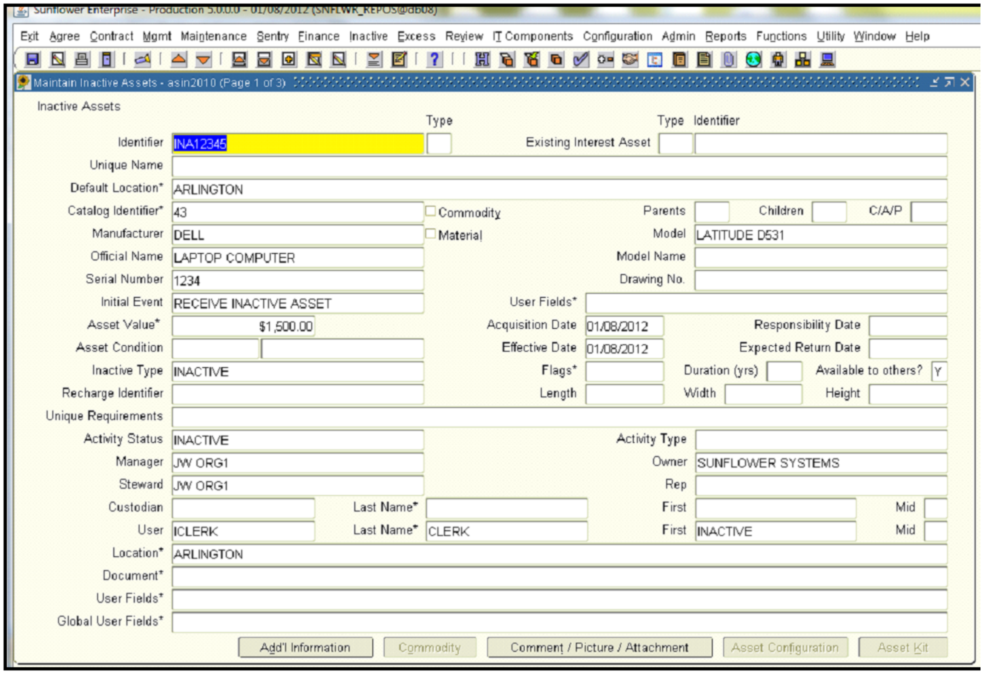
A Property Manager will determine which PO lines make up an asset. If users want to capitalize the newly created asset, users can reflect the capital asset details in the Sunflower Assets Finance module or a 3rd party financial system via a real-time process interface. Alternatively, users can create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

CREATE INACTIVE ASSETS FROM INACTIVE RECEIVAL REQUESTS

Staff throughout the organization will make requests for inactive asset receival as the need to store assets arise. Once the request is made, how do the counterparts in the property storage know that pending requests are awaiting approval? Depending on the internal business process, the property storage staff can use reports to review pending asset receival requests and approve or deny receival requests as deemed appropriate.

NAVIGATION

- Click Inactive
- Click Maintain Inactive Assets



Step 1. Enter Inactive asset **Identifier.**

Step 2. Tab to **Existing Interest Asset Type** field.

Step 3. Enter or select **ASR** (for asset request), then tab to the next **Identifier** field.

Step 4. Enter the **Request Number** in the **Identifier field,** then tab - the asset information should populate the screen.

Step 5. Make updates to the record as needed, then **Save**.

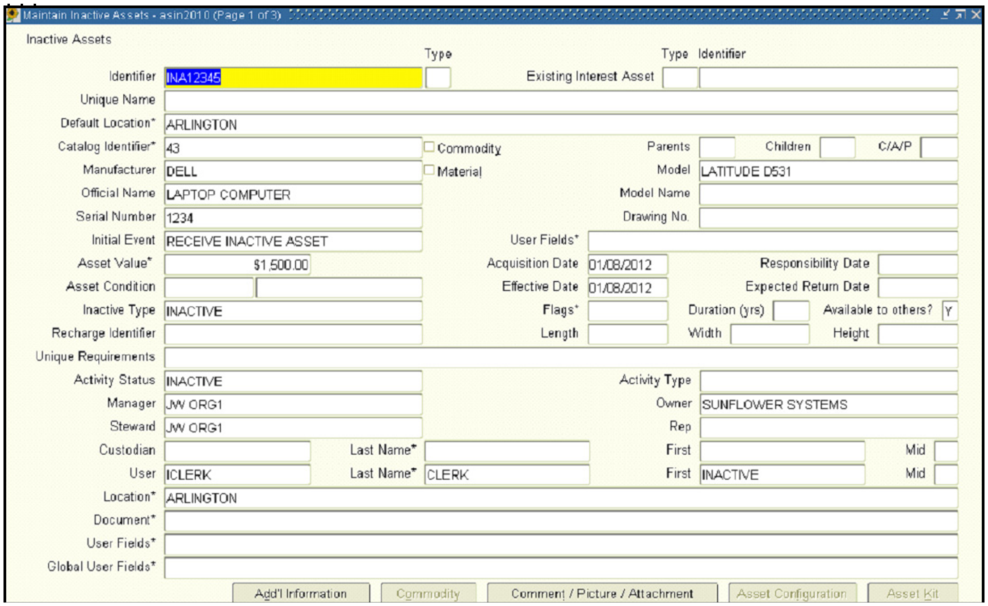
Create Inactive Assets from Scratch

Similar to the role that the **Maintain Inventory Assets** screen plays in the management of inventory assets, the **Maintain Inactive Assets** screen is an integral feature that can be used frequently in the day-to-day management of inactive assets. Use the **Maintain Inactive Assets** screen to create inactive assets in an ad hoc manner. For example, users may want to track assets that the organization fabricates for custom applications and stores until they are ready to be deployed for active service. These assets were not purchased so there is no purchase order information to refer to when creating the asset records for the newly fabricated items. In addition, the **Maintain Inactive Assets** screen enables users to update the descriptive information (e.g. **Location**, **Custodian**, and **Asset Condition**) for an inactive asset, as well as create catalog entries, add comments, attachments or pictures.

Scenario: The following graphic illustrates how to create an inactive asset from scratch. In this example, users will learn how to create an inactive asset record for a new computer that users want to store until it is ready for active service deployment.

Navigation

- Click Inactive
- Click Maintain Inactive Assets



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

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

Step 3. Enter the core asset information accordingly.

Step 4. Enter the appropriate information in the following fields to add the inactive interest asset-specific information:

- **Inactive Type** -- indicates what type of inactive status to assign to the asset.
- **Available to others?** -- indicates if the asset can be used by others while in its inactive status.
- **Length/Width/Height** -- indicates the asset's dimensions for storage purposes.
- **Recharge Identifier** -- indicates the identifier assigned to the recharge general ledger account.
- **Unique Requirements** -- indicates any unique storage requirements for the asset.

Step 5. Update the new inactive asset's information, as needed. (e.g. **Asset Condition** as **USED - GOOD**. **Location** updates etc.)

Step 6. Click the **Save** icon to save the inactive asset record.

NOTE: If users do not enter a value in a required field, Sunflower prompts users to do so.

MAINTAIN INACTIVE ASSETS FIELD TERMS

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

Maintain Inactive Assets Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
Identifier	Identifier assigned to an inactive asset.
Type (Asset Identifier)	The asset identifier Type assigned to the asset, (e.g.taggable, non-taggable, etc.). An example of how users might use this feature is to indicate that an asset is being tracked but is not directly taggable. Users may have assets that would be impractical to try to affix a barcode or other type of identifier directly to the asset. By indicating that the asset is not directly taggable, users can alert the staff to look for the asset identifier in another logical location when indicating the asset is not taggable. Asset identifier types are maintained as Domains in the Administration module. Users must create the asset identifier types before users can assign them throughout the application.
Existing Interest Asset Type **Identifier**	Specifies the type of interest asset (e.g. inventory, agreement, inactive, excess etc.) Leave blank if this asset record does not exist in the systems as another interest asset type. For example, users may have an inventory asset with its own inventory asset identifier that users want to convert into an inactive asset. Users can reference an existing inventory interest asset Type with its corresponding inventory interest asset identifier and Sunflower populates all of the corresponding information for that asset in the Maintain Inactive Assets fields.
Unique Name	The Unique Name is a data set on items that is globally unique, unambiguous and robust enough to ensure that information is consistent through the life cycle of the asset and supports the multifaceted business applications and users. The Unique Name enables organizations to track an asset irrespective of the custodians who are accountable for the asset during its lifetime.
Default Location*	Specifies the default location for an inventory asset. For assets that are frequently borrowed from a Check-In-Out Point, the Default Location* specifies the asset's location when it is not loaned out to a borrower.
Catalog Identifier*	The Catalog Identifier field automatically populates upon specifying the designated Manufacturer and Model Number combination. Alternatively, if users know the Catalog Identifier*, users can enter the value here and the corresponding manufacturer and model number information is populated based on the Catalog Entry. For more information about Catalog Entries, see the Catalog Management chapter of the Sunflower Enterprise Administration Guide.
Commodity	The Commodity asset checkbox is marked if the asset is designated as an asset using the Commodity button at the bottom of this page.
Parents	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 detail parent record information on the Maintain Asset Structures screen where users can view the parent record information for the selected asset.

Maintain Inactive Assets Field Terms (Continued)

Field Name	Description/Explanation
Children	The Children field displays the number of child records for the current asset record that users are viewing. If an asset has a child asset association, the number of associations displays in the Children field. An asset can have multiple children. Double click in the Children field to view the detail child record information on the Maintain Asset Structures screen where users can view the child record information for the selected asset.
C/A/P	The C/A/P field indicates if there is a comment C, attachment A, or picture P attached to the selected inactive asset record.
Manufacturer	Double-click to select from the list of values a valid manufacturer name. If the value users are looking for does not appear in the list of values, use the Administration module to add the new Manufacturer name to the list of valid Organizations. For more information about adding manufacturers, see the People and Organization chapter of the Sunflower Enterprise Administration Guide.
Commodity	The Commodity checkbox is marked if the asset is designated as an asset using the Commodity button at the bottom of this page.
Material	The Material asset checkbox is marked if the asset is designated as stock material that can be tracked using the Manage Material function in the Inactive Module
Model	Double-click to select from the list of values. If the value users are looking for does not appear in the list of values, use the Management module Maintain Catalog Entries screen to add the corresponding manufacturer and model number combination.
Official Name	The Official Name field automatically populates upon specifying the Manufacturer and Model Number. Create Official Names for Manufacturer and Model combinations by using the Maintain Catalog Entries screen.
Serial Number	Enter the serial number for the asset. If there is no serial number for the asset, leave blank.
Drawing No	Enter the drawing number used to design and construct the asset. Generally used for architectural and construction projects.
Initial Event	Double-click to select from the list of values. This field can be extended to capture the business practice specific information. Asset Initial Events are maintained as Domains in the Administration module. Users must set up the asset initial events before users can assign them throughout the application.
User Fields	Double-Click to open up this complex field for data entry. In this case, the User Field captures the context based information for a Purchase Initial Event has been extended to capture the Purchase Order, Purchase Order Line and Purchase Account information from a PO. Leave Blank if there is no corresponding PO information for the corresponding initial event. Users can define the context for the user fields specific to the screens and interest assets. User fields enable users to personalize the application to provide additional information that is not available when using the standard application.

Maintain Inactive Assets Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
Asset Value*	Double-click to open the Asset Value Components block and specify the asset value components. Asset Value Types are Domains that users specify in the Administration module. Users will define these types based on the organization's business practices. The value components of an asset can be comprised of several different activities (e.g. acquisition cost, shipping, site preparation, installation, upgrades etc.). Enter the cost of the asset. Do not enter $, commas, or.00. 1500 is the same as $1,500.00. Users can use the Administration module to extend the Asset Value Component user defined field (User Fields) to accommodate the business practices. The **Cap?** (Capitalize?) field tells users if an asset is capitalized. Users can capitalize an asset with the Finance module using the Capitalize Financial Assets screen. It is a display only field on this screen.
Acquisition Date	Enter the date the asset was purchased. MM/DD/YYYY format. Double-click to use the Calendar function to select the date from Calendar pop-up window.
Responsibility Date	Enter the date in which the organization took ownership of the asset. MM/DD/YYYY format. Double-click to use the Calendar function to select the date from Calendar pop-up window.
Asset Condition	Used to specify the current working quality of the property. Select from the list of values the appropriate condition of the asset. If users cannot find the appropriate selection, users can create the value in the Administration module by using the Maintain Asset Conditions screen. For more information about Asset Conditions, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.
Effective Date	The date that the asset becomes active in the Sunflower database. MM/DD/YYYY format. Double-click to use the Calendar function to select the date from Calendar pop-up window.
Expected Return Date	When loaning property, enter the date that users expect to have the property returned. MM/DD/YYYY format. Double-click to use the Calendar function to select the date from Calendar pop-up window.
Inactive Type	Indicates the type of inactive status assigned to the asset.
Flags*	Double-click to open the Asset Flag complex field to specify special conditions for the asset. (e.g. sensitive, hazardous etc.) Leave blank if there are no special conditions to apply to the asset. In this case, the computer has been marked as sensitive. Although the computer itself may be benign, the data residing on the computer hard drive may be of a sensitive nature. To add asset flags, use the Administration module Define Asset Flags screen. (Other typical flags might be Flammable, Keep Dry, Corrosive, etc.) For more information about Asset Flags, see the User Extensibility chapter of the Sunflower Enterprise Administration Guide.
Duration (yrs)	Enter the duration of the asset's inactive period in the Duration (yrs) field.The length of the inactive period is designated in years (e.g, 0.5 = 1/2 year).
Available to others?	Indicates if the asset can be used by others while in its inactive status.

Maintain Inactive Assets Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
Recharge Identifier	Enter the recharge general ledger account to charge storage and related costs for inactivating the asset in the Recharge Identifier field.
Length **Width** **Height**	Length/Width/Height -- indicates the asset's dimensions for storage purposes.
Unique Requirements	Specify any special considerations for the handling and storage of the asset (e.g. hazard, special storage needs, etc.) in the Unique Requirements text box.
Activity Status	Used to specify the current state of the property. (e.g. In Service, Inactive, etc.) Organizations can add activity statuses using the Administration module Maintain Activity Statuses screen. For more information about Activity Statuses, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.
Activity Type	Enter the Activity Type for the asset. For example, users may want to use an asset for various research projects. Organizations can update the Activity Type field to reflect the project that is currently using the asset.
Manager	Specify the managing organization of the asset. Organizations create managers by using the Administration module Maintain Organizations screen and assigning the organization as a Manager organization structure.
Owner	Specify the owning organization of the asset. Organizations create owners by using the Administration module Maintain Organizations screen and assigning the organization as an Owner organization structure.
Steward	Specify the steward of the asset. Organizations create stewards by using the Administration module Maintain Organizations screen and assigning the organization as a Steward organization structure.
Rep	The name of the Steward’s primary ACR (Asset Center Representative).
Custodian	Specify the custodian of the asset. Organizations can select a Custodian by their Last Name, First Name or Identifier. A Custodian identifier can be an employee ID or badge number that is unique to that individual. Organizations create individuals in Sunflower applications by using the Administration module Maintain People screen.
User	Specify a specific user of the asset if applicable. Organizations can select a User by their Last Name, First Name or Identifier. A User identifier can be an employee ID or badge number that is unique to that individual. Organizations create individuals in Sunflower applications by using the Administration module Maintain People screen.
Location*	Double-click to open the Location* complex field and assign the asset location accordingly. Organizations can create locations using the Administration module Maintain Locations screen and its supporting maintenance screens to capture the organization’s set of locations. For more information about setting up locations, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.
Document*	Enter the related asset Document* information such as type of supporting documentation, documentation identifier, storage type and organization for an asset. Organizations can use the Administration module Maintain Domains screen to create and edit the Document Type and Document Storage Type domains to fit the business practices.

Maintain Inactive Assets Field Terms (Continued)

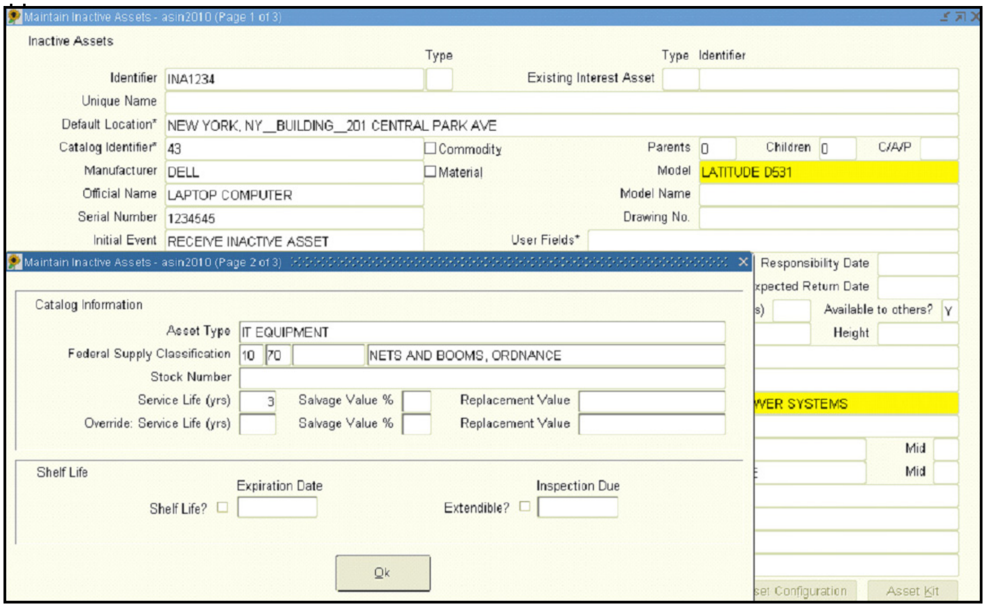
FIELD NAME	DESCRIPTION/EXPLANATION
User Fields	User Defined Fields (UDFs) data entry is based upon the business practices/ needs. User fields enable users to personalize the application so that users can provide additional information that is not available when using the standard application. In this example, the UDF is a context free extension of the Inventory Asset State. Users can provide the asset weight in this case.
Global User Fields*	Global User Defined Fields (UDFs) data entry is also based upon the business practices/needs. Global user field information is applicable to all interest asset states. This field is tied the Asset State. In this example, the UDF is a context based extension of the Asset State which is tied to the Catalog Entry Asset Type information for this asset.
Additional Information	Click to display the pop-up window for Additional Information which contains the Catalog Entry and Shelf Life information for this asset.
Commodity	Click to open the Commodity Information screen to enter commodity specific units of measure and quantities.
Comment/Picture/ Attachment	Click to open the Comments, Pictures and Attachments screen. Add any supporting comments, pictures or attachments for the asset.
Asset Configuration	Click to open Asset Configuration screen and enter or view configuration information. May be disabled if user does not have appropriate roles.
Asset Kit	Click to open Asset Kit screen and enter or view kit information. May be disabled if user does not have appropriate roles.

MAINTAIN INACTIVE ASSETS - ADDITIONAL INFORMATION

Use the **Additional Information** button to view additional catalog information. Most of these fields are displayed only when viewed in this manner. Organizations must use the **Maintain Catalog Entries** screen to create or edit the **Catalog Information**. users can, however, use this screen to provide override values for **Service Life**, **Salvage Value %** or **Replacement Value**.

NAVIGATION

- Click Inactive
- Click Maintain Inactive Assets
- Click Additional Information



Maintain Inactive Assets Additional Information Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
Asset Type	Displays the type of asset assigned to this asset's catalog entry. Display only.
Federal Supply Classification	Displays the assigned Federal Supply Classification Group Number, Class Number, National Identification Number and long name for the asset. Display only.
Stock Number	Specifies the assets internal stock number or identification. Display Only
Service Life **Override:**	The assigned catalog entry service life (in years) for the specified asset type. Display only. Users can use the Override Service Life field to enter an override value for the asset's service life.
Salvage Value % **Override:**	The assigned catalog entry Salvage Value % for the specified asset type. Display only. Users can use the Override Salvage Value % field to enter an override value for the asset's Salvage Value %. Enter a value between 1 and 100.
Replacement Value **Override:**	The assigned catalog entry replacement value for the specified asset type. Display only. Users can use the Override Replacement Value field to enter an override value for the asset's replacement value.
Shelf Life	The Shelf Life checkbox displays if the asset has a shelf life based on the catalog entry of that asset.
Extendible?	The Extendible? checkbox displays if the asset's Shelf Life is extendible based on the catalog entry of that asset. The Inspection Date field can be used to enter an inspection date for extending the asset's shelf life.

MASS ASSET CREATION

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

- Maintain Inactive Assets - Duplication
- PO Interface - Duplication

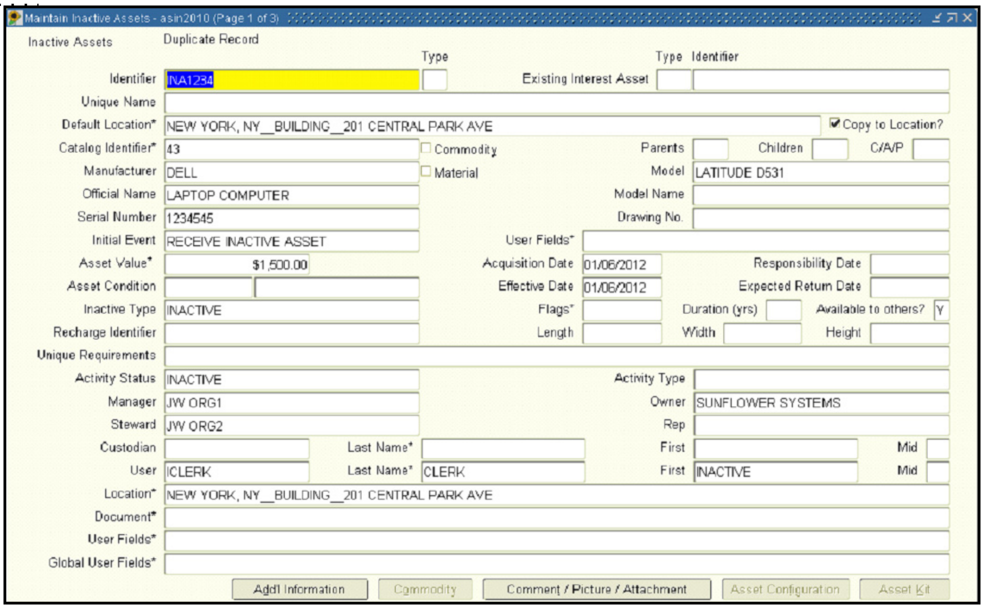
MAINTAIN INACTIVE ASSETS - DUPLICATION

If organizations have several assets of the same type that need to created and placed in storage until they are ready to be issued, use the **Maintain Inactive Assets Duplication** feature to create new asset records with the same descriptive text. Users must supply the duplicate assets with a unique asset **Identifier** and **Serial Number**. After duplicating the new assets, verify and update the **Location**, **Custodian**, and **User** information for each duplicate asset.

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

NAVIGATION

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



Step 1. Click either F4 or Shift + F6 to duplicate an asset. Notice that **Duplicate Record** appears at the top of the screen.

Step 2. Enter a new **Identifier** for the duplicate asset.

Step 3. Enter a new **Serial Number**.

Step 4. Verify or update the **Location**, **Custodian**, and/or **User Fields**.

Step 5. Click the **Save** icon to save the asset record.

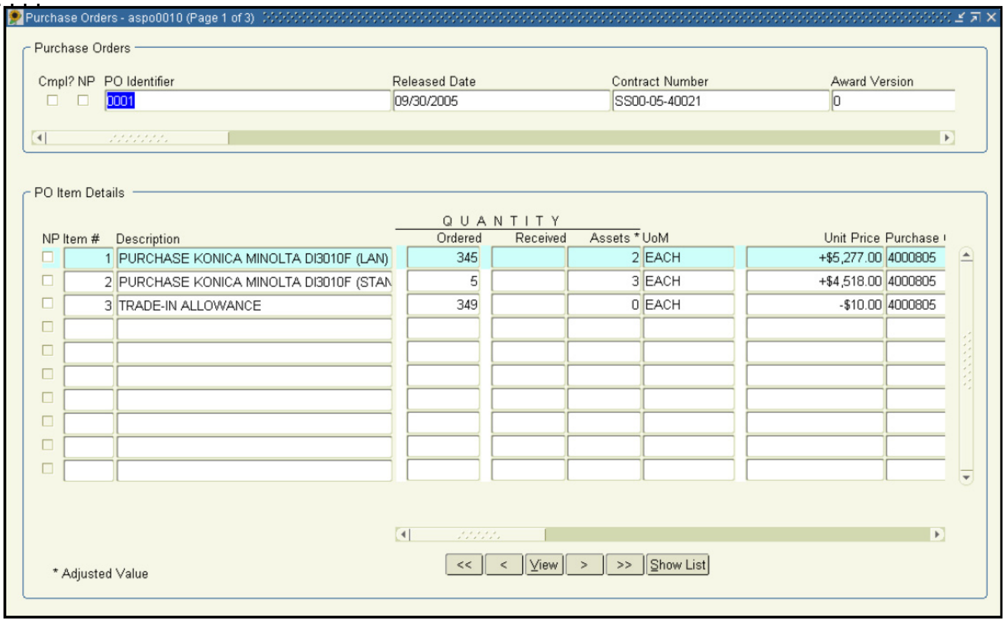
PO Interface - Duplication

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

Scenario: The following graphic illustrates how to create duplicate records with the PO Interface. For more information about how to use the PO Interface to allocate line items, see the PO Interface Chapter.

NAVIGATION

- Click Inactive
- Click Process Inactive Asset PO Interface Records
- Enter Number in Create field
- Place cursor in the identifier field
- Click Create button
- Click Save icon

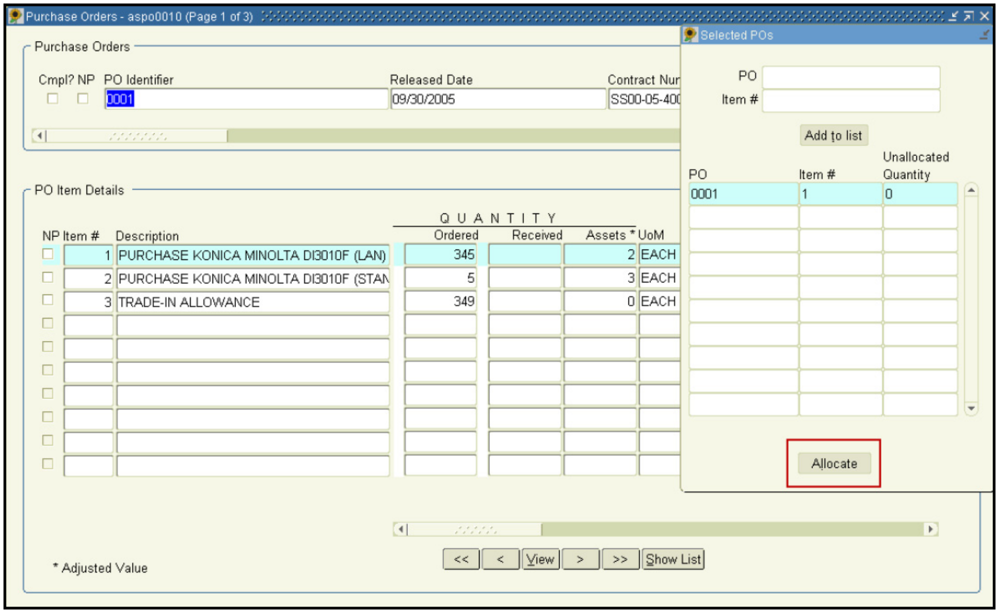


Step 1. From the Inactive menu, select **Process Inactive Assets PO Interface Records.** The **Purchase Order** form appears.

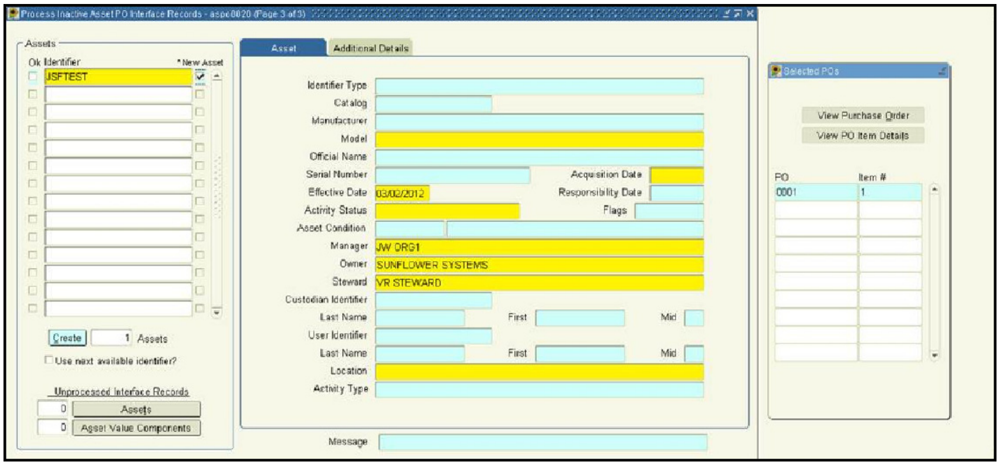
Step 2. Enter the appropriate **PO Identifier** or click **F8** to select from all available Purchase Order numbers.

Step 3. Click the **Show List** button at the bottom of the form. This will bring up a second window, **Selected POs**.

Step 4. From the **Purchase Order** form, click “>” to select one line item or “>>” to select all lines.



Step 5. Click the **Allocate** button from the **Selected POs** window.



Step 6. Enter the number of duplicate assets to create in the field next to the **Create** button.

Step 7. Press the **Create** button.

- The new assets are created and indicated in the **Assets** block by either the **Tag Needed** indicator or by incremented asset identifiers.
- Assign a valid asset identifier to each asset.
- If necessary, modify the details of each asset before saving. When using an alphanumeric value; any number of initial alpha characters terminated by a numeric value of one or more digits increments the numeric portion of the asset identifier and is assigned to each duplicate asset.

NOTE: Users will need to update information on the **Assets** tab for each asset accordingly. For example, **Serial Number**, **Activity Type**, **Manager**, **Custodian**, **Steward** and **Location** may vary for each asset record.

Step 8. Click the **Save** button.

MANAGE INACTIVE ASSETS

The Inactive module facilitates the detailed tracking between the relationships of assets, organizations and people as they change over time. After acquiring the assets, users will need to assign a location, a responsible party and organization for each asset. Sunflower enables users to maintain the inactive assets by using several Inactive module screens to update the attributes of the inactive assets. Complementing the **Maintain Inactive Assets** screen are the supporting Inactive module screens that can assist users in the day-to-day management of the inactive assets.

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

The **Change Inactive Assets Information** screen enables users make simultaneous mass updates to multiple assets within the organization. Another useful Inactive module feature is the **Maintain Asset Structure** screen that enables users to manage the diverse set of Parent/Child asset structures. Finally, the Inactive module reports enable organizations to view the details and history of the inactive assets.

The following sections will detail how to use the above inactive module features to manage and capture the inactive assets and related activities efficiently.

- View Inactive Asset Details
- Edit Inactive Asset Details

Further functions that can be used to manage inactive assets are covered extensively in the Inventory Assets chapter as follows:

- Edit Inventory Asset Records
- Edit Comments, Pictures and Attachments
- Maintain Asset Structures
- Transfer Assets
- Transfer Inventory Asset Value
- Maintain Inventory Asset Ongoing Events
- Maintain Inventory Asset User Fields

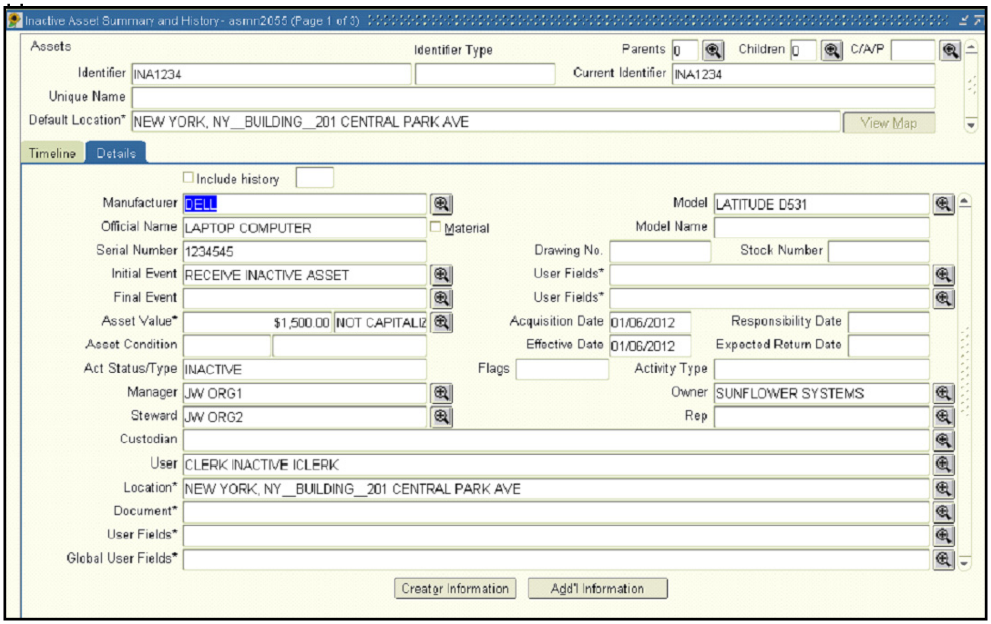
VIEW INACTIVE ASSET DETAILS

The **Asset Summary and History** screen is one of the most widely used screens. The **Asset Summary and History** screens enable organizations to view the current and historical information for assets based on a specific interest asset (e.g. Agreement, Management, Finance, Inactive, and Excess). A quick search to find current and historical information for a single asset or a group of assets can be performed. Sunflower maintains a history of every change made to an asset.

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

NAVIGATION

- Click Inactive
- Click Inactive Asset Summary and History



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

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

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

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

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

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

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

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

Step 8. Click the **Timeline** tab to view the selected asset event, resolutions and requests history.

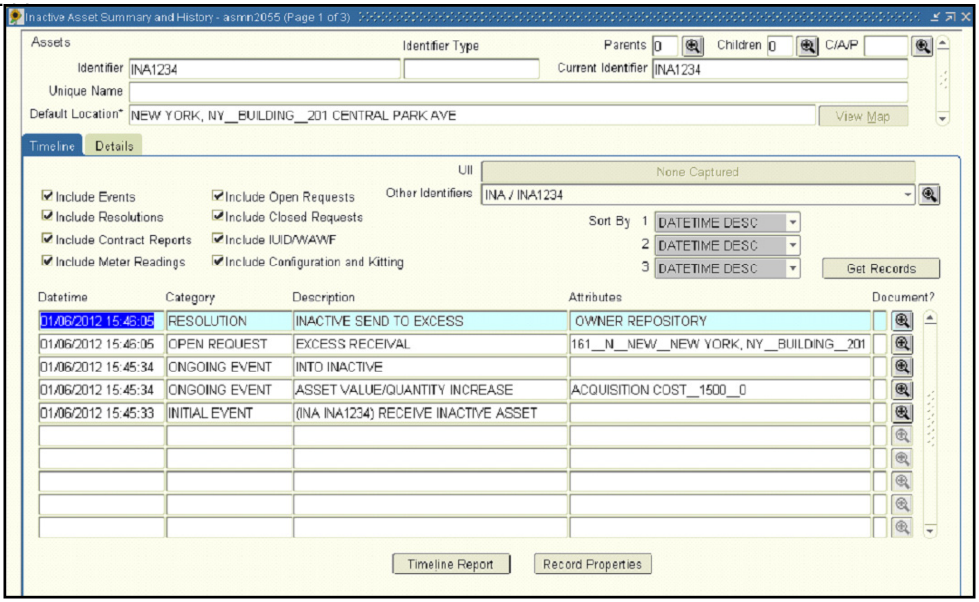
REVIEW THE ASSET EVENT HISTORY

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

Scenario: The following graphic illustrates how to use the **Asset Summary and History Timeline** tab to review the history of an asset. This is a display only screen.

NAVIGATION

- Click Inactive
- Click Inactive Asset Summary and History
- Select the Include History checkbox
- Click the Timeline tab



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

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

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

- **Include Events**

  Events reflect the asset activity that occurs during the lifecycle of the asset. For example, **Initial Events** (e.g. Purchase, Subject to Agreement, Receive Inactive Asset), **Ongoing Events** (e.g. Change of Custodian, Change of User, Change of Location, Added to Agreement, Asset Value/Quantity Increase) and **Final Events** (e.g. Transfers, Retire, Lost Damaged Or Destroyed, Obsolete Asset).

- **Include Resolutions**

  Resolutions are a method for verifying that an asset record is accurate during a review campaign (Physical Inventory). For example, a resolution could be the barcode scan of an asset during a review campaign.

- **Include Open Requests**

  Open Requests reflect a transaction that is still awaiting a conclusion. For example, if users request a transfer of an asset to another custodian and that custodian has not closed the request by either accepting or denying the request, the request remains open and will appear on the **Timeline** grid as such. The requestor of the transfer can close the request by withdrawing the request.

- **Include Closed Requests**

  Closed requests reflect a transaction that has been completed.

- **Include Reports**

  Lists reports generated for the selected asset.

- **Include IUID/WAWF**

  Lists whether the selected asset has generated a virtual asset, asset mark, and uploads to the IUID Registry.

- **Include Meter Readings**

  Include events related to Maintenance and Meter Readings.

- **Include Configuration and Kitting**

  Include events related to adding, updating, or removing the asset as part of a Configuration or Kit.

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

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

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

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

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

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

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

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

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

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

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

ASSET SUMMARY AND HISTORY FIELD TERMS

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

Asset Summary and History Field Terms

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

Asset Summary and History Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
Material	The Material checkbox is marked if the asset is designated as stock material that can be tracked using the Manage Material function in the Inactive Module.
Model Name	Displays the model name assigned to the asset by the manufacturer.
Serial Number	Displays the serial number assigned to the asset by the manufacturer.
Drawing Number	Displays the drawing number used to design and construct the asset. Generally used for architectural and construction project use.
Stock Number	Displays the internal Stock Number assigned to the asset's catalog entry. Display Only.
Initial Event	Displays the asset initial event type. For example, Purchase, Fabrication or Transfer. An initial event is the asset's method of acquisition. Sunflower enables users to establish the initial event types that best suit the organization. Use the Administration module to define other Asset Initial Event Types for the organization by using the Maintain Asset Event Types screen, select the Asset Initial Event Type category, and then add the Asset Event Type.
User Fields*	Displays user field information associated with the initial event.
Final Event	Displays the asset final event type. For example, Excess Sale or Transfer. A final event is the method for recording the retirement of an asset. Sunflower enables users to capture each interest asset's final event. Use the Management module to further define asset final events for the organization by using the Create Inventory Asset Final Events screen.
User Fields	Displays user field information associated with the final event.
Asset Value	Displays the value entered for the asset. Press the Edit icon to display the asset value component and summary detail. The field adjacent to Asset Value specifies if the asset is capitalized or not capitalized. Capitalize an asset with the Finance module using the Capitalize Financial Assets screen.
Acquisition Date	Displays the date the asset was acquired.
Responsibility Date	Displays the date the organization became responsible for the asset.
Asset Condition	Displays the current condition of the asset.
Effective Date	Displays the date the asset state becomes effective.
Expected Return Date	Displays the expected return date of an asset that has been loaned, stored, or sent out for repair.
Act Status/Type	Displays the current active status of an asset such as In Service or Storage.
Flags	Displays the flags assigned to an asset.
Activity Type	Displays the asset's activity type. For example, the asset may be used for various research projects. View the Activity Type field for the project that is currently using the asset. Create activity types with the Administration module by using the Maintain Domains screen, select the Activity Type domain and modify or add a new activity type.
Manager	Displays the organization that manages the asset. A Manager may be the child organization of an Owner in a parent-child hierarchical structure.

Asset Summary and History Field Terms (Continued)

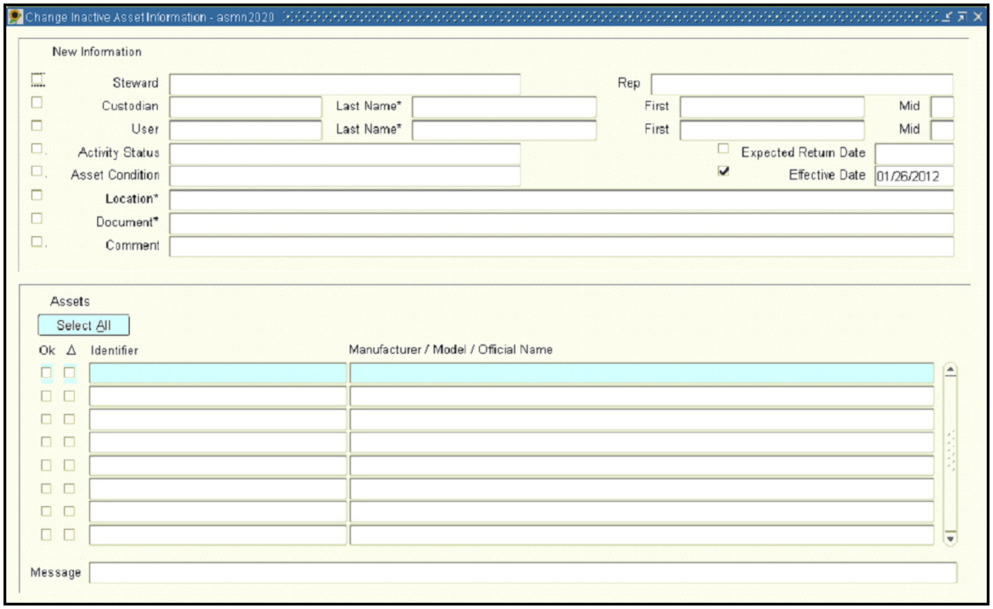
FIELD NAME	DESCRIPTION/EXPLANATION
Owner	Displays the organization that owns the asset. An Owner is the highest level of authority in a parent-child hierarchical structure. It can be the parent of a Manager.
Steward	Displays the organization that is the steward of an asset. A Steward may be the child organization of a Manager in a parent-child hierarchical structure.
Rep	Displays the name of the steward’s primary asset center representative.
Custodian	Displays the asset’s custodian. A custodian is the person in possession of and responsible for the control and care of an asset.
User	Displays the user of an asset. The person that is authorized to use an asset.
Location*	Displays the asset’s location.
Document*	Displays the type of supporting documentation, documentation identifier, storage type and organization for an asset.
User Fields*	Displays user field information associated with the Inventory Asset.
Global User Fields*	Displays global user field information applicable to the Core Asset record.
Creator Information	Click to open the Creator Information display box to view the Transaction Creator Information. 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.
Additional Information	Click the Additional Information button to open the interest asset details screen. In this case, the Inactive Asset Details screen is open and available for editing.

UPDATE MULTIPLE INACTIVE ASSET RECORDS

If users have made a request to redeploy an asset, or if assets are moved about within the storage facility, then the asset record should be updated by the appropriate individual to reflect the asset's current status. Use the **Change Inactive Asset Information** screen to update the asset records with new information such as location, steward, and/or custodian.

NAVIGATION

- Click Inactive
- Click Change Inactive Asset Information



Step 1. In the **New Information** block, enter the appropriate values. Options include **Steward, Custodian, User, Activity Status, Expected Return Date, Asset Condition, Location, Document** and **Comment.**

Step 2. Enter **Document** information.

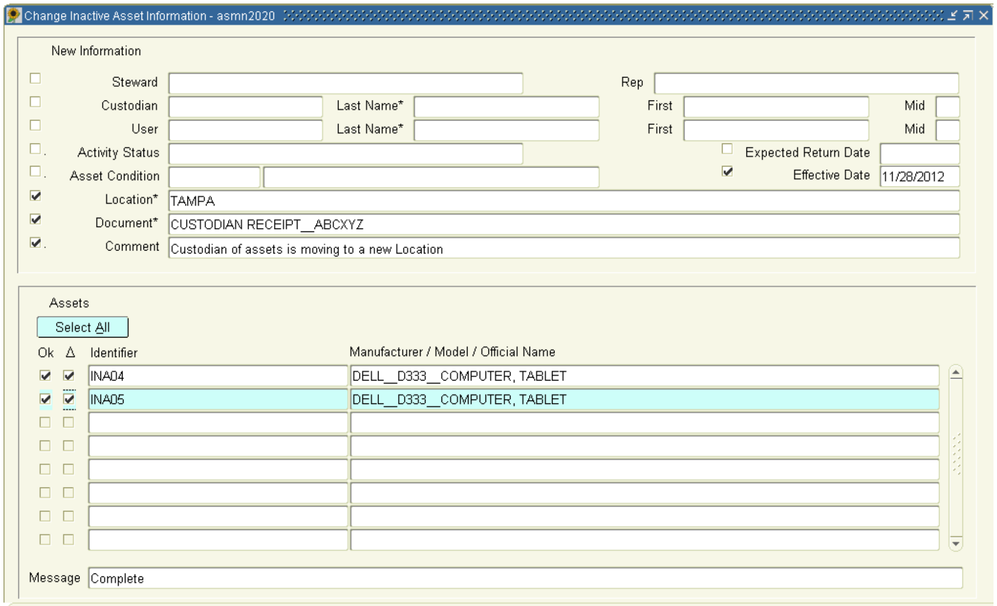
Step 3. Enter **Comments** as appropriate.

Step 4. Enter the asset **Identifiers**, or use the **Find** icon to search for multiple asset records.

NOTE: The query searches and retrieves from the database the assets assigned to the selected site and displays them in the **Assets** block. Users can now update the assets with the new information.

Step 5. Ensure the delta checkbox next to the asset identifiers are selected. Otherwise updates will not be made to the asset(s)

Step 6. Click the **Save** icon to save the changes to the selected assets.

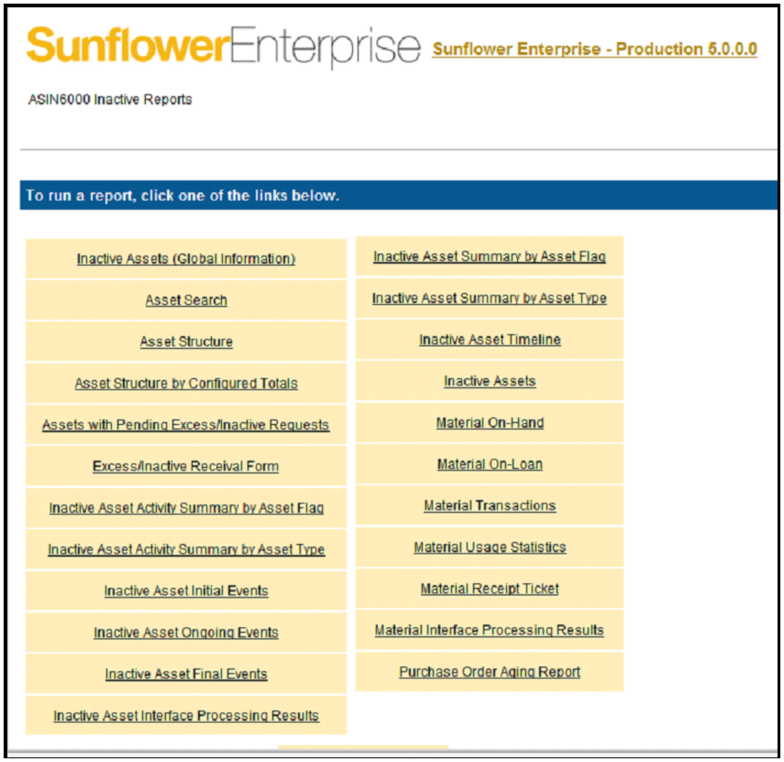


INACTIVE ASSETS REPORT

Use the **Inactive Assets** report to show the details of inactive assets. To run a report, perform the following:

NAVIGATION

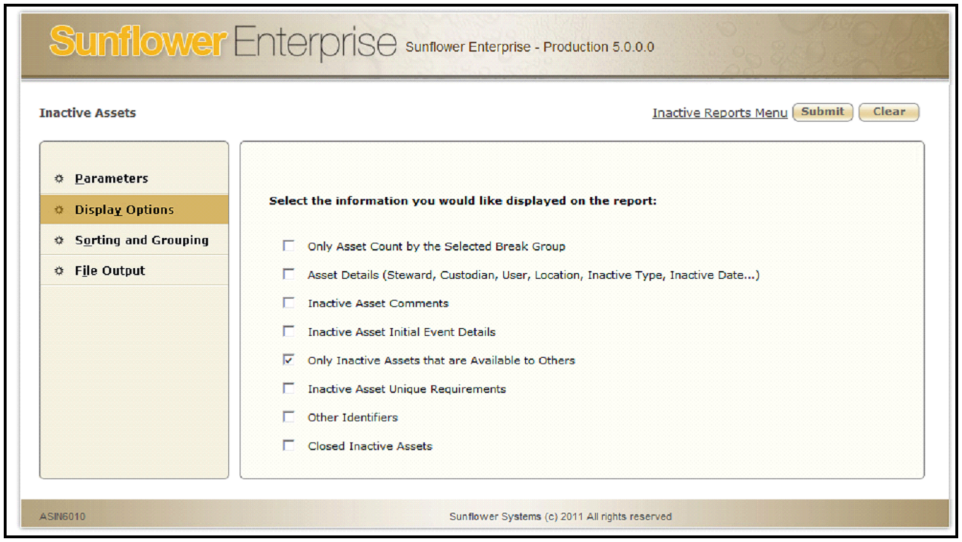
- Click Inactive
- Click Inactive Reports
- or...
- Click Reports
- Click Inactive Reports
- Click Inactive Assets



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

Step 2. Click the **Inactive Assets** report.

The following report parameters were used to generate the report.



INACTIVE ASSETS REPORT OUTPUT

Review the **Inactive Assets Report** output to determine if there are any inactive assets that are available for use. The following report reveals several inactive assets that are available for use.

Sunflower Enterprise — **Inactive Assets** — Page 2 of 3
ASIN6010 — 01/26/2012 13:05

Identifier	Flags	Official Name	Manufacturer	Model	Serial Number		Asset Value	Acq Date
ASL.I1		LAPTOP COMPUTER	DELL	LATITUDE D531	ASL.I1	$	500.00	01/15/2012
ASL.I2		LAPTOP COMPUTER	DELL	LATITUDE D531	ASL.I2	$	500.00	01/15/2012
BFELDMAN04		LAPTOP	NICOLAS ORG	LAPTOP	BFELDMAN04	$	10,000.00	12/28/2011
CONFIGINV001		LAPTOP COMPUTER	DELL	LATITUDE D531		$	10,000.00	01/11/2012
INA1234		LAPTOP COMPUTER	DELL	LATITUDE D531	1234545	$	1,500.00	01/06/2012
INA12345		LAPTOP COMPUTER	DELL	LATITUDE D531	1234	$	1,500.00	01/08/2012
JUDY31		PENS	JW PENS	PEN1		$	11.00	01/10/2012
JUDY32		BRUSHES	JW BRUSHES	BRUSH1		$	11.00	01/10/2012
MTINA1		LAPTOP COMPUTER	DELL	LATITUDE D531		$	.00	12/15/2011
MTINA2		LAPTOP COMPUTER	DELL	LATITUDE D531		$	.00	12/15/2011
				Total :	**10.00**	**$**	**24,022.00**	
				Report Total :	**10**	**$**	**24,022.00**	

NOTE: There are several assets that are available for use while in storage.

RE-UTILIZE INACTIVE ASSETS

When an asset is available for use during its inactive period, or the appropriate custodian of the asset requests to redeploy the asset to active status, a request for redeployment is made to the organization handling inactive assets. This organization can then place the asset back in service.

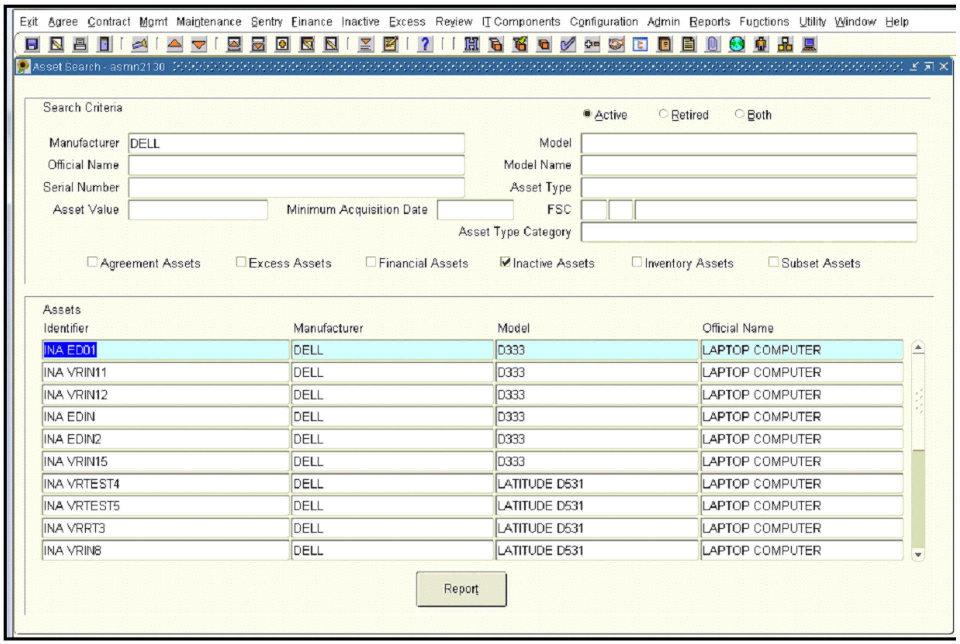
SEARCH FOR INACTIVE ASSETS

Users may find that another organization has inactivated an asset that users can utilize in the own organization. By using the **Asset Search** screen to find assets that have been designated as inactive, users can discover that rather than purchasing a new asset, users can utilize an existing asset.

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

NAVIGATION

- Click Inactive
- Click Asset Search



Step 1. Navigate to the **Asset Search** screen.

NOTE: The **Asset Search** screen is available from the Agreement, Management, Finance, Inactive and Excess modules.

Step 2. Check the **Inactive Asset** checkbox to limit the asset search to excess assets.

Step 3. Specify at least one criteria in the **Search Criteria** block.

Step 4. Click the **Find** icon to return the results of the **Asset Search** criteria.

ASSET SEARCH REPORT

Alternatively, users can click the **Report** button to open up the **Asset Search** HTML based report. Enter the reporting criteria to return a report that can be setup as either a PDF or HTML output. Any selection criteria that users enter on this screen will be the default values in the HTML based report if users click the **Report** button after selecting the criteria.

Sunflower Enterprise — Asset Search — Page 2 of 4

ASMN6120 — 05/22/2006 15:13

Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acq Date
INA IXX01		DESK 6 FT	STEELCASE	DESK 6 FT		$ 800.00	01/01/1990
	Steward : SUNFLOWER SYSTEMS Custodian : DOE JOHN 050598 Phone : 555.1234 User : FRAZIER KRISTEN S 020866 Phone : 925.371.0136			Location : LIVERMORE BUILDING : E WHG : XX			
INA I0101		DESK 6 FT	STEELCASE	DESK 6 FT		$ 800.00	01/01/1990
	Steward : SUNFLOWER SYSTEMS Custodian : DOE JOHN 050598 Phone : 555.1234 User : FRAZIER KRISTEN S 020866 Phone : 925.371.0136			Location : LIVERMORE BUILDING : E WHG : 01			
INA I0201		DESK 6 FT	STEELCASE	DESK 6 FT		$ 800.00	01/01/1990
	Steward : SUNFLOWER SYSTEMS Custodian : DOE JOHN 050598 Phone : 555.1234 User : FRAZIER KRISTEN S 020866 Phone : 925.371.0136			Location : LIVERMORE BUILDING : E WHG : 02			
INA I0301		DESK 6 FT	STEELCASE	DESK 6 FT		$ 800.00	01/01/1990
	Steward : SUNFLOWER SYSTEMS Custodian : DOE JOHN 050598 Phone : 555.1234 User : FRAZIER KRISTEN S 020866 Phone : 925.371.0136			Location : LIVERMORE BUILDING : E WHG : 03			
INA I0401		DESK 6 FT	STEELCASE	DESK 6 FT		$ 800.00	01/01/1990
	Steward : SUNFLOWER SYSTEMS Custodian : DOE JOHN 050598 Phone : 555.1234 User : FRAZIER KRISTEN S 020866 Phone : 925.371.0136			Location : LIVERMORE BUILDING : E WHG : 04			
INA I0501		DESK 6 FT	STEELCASE	DESK 6 FT		$ 800.00	01/01/1990
	Steward : SUNFLOWER SYSTEMS Custodian : DOE JOHN 050598 Phone : 555.1234 User : FRAZIER KRISTEN S 020866 Phone : 925.371.0136			Location : LIVERMORE BUILDING : E WHG : 05			

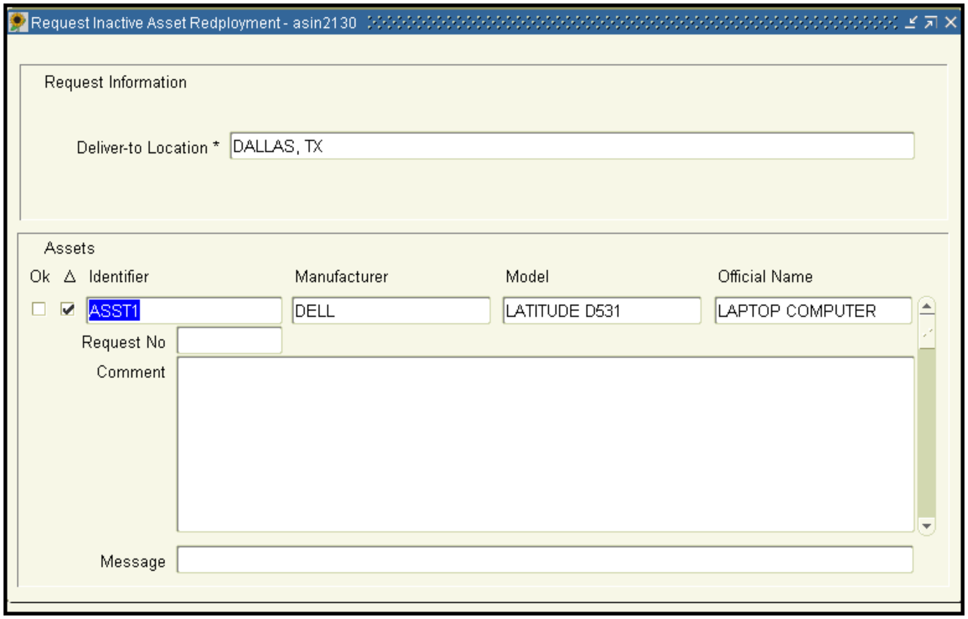
Request Inactive Asset Redeployment

Use the **Request Inactive Asset Redeployment** screen to redeploy an inactive inventory asset. Send a request for redeployment to the organization handling inactive assets when making an asset available for use during its inactive period or to redeploy an inactive asset to active status. After receiving a redeployment request, the property storage organization can place the asset back in service.

Scenario: The following graphic illustrates how to how to request that an inactive asset be redeployed. The user wants an asset to be placed back into service and delivered to the office.

NAVIGATION

- Click Inactive
- Click Request Inactive Asset Redeployment



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.

Step 4. Click the Tab key to populate **Manufacturer**, **Model**, and **Official Name**.

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

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

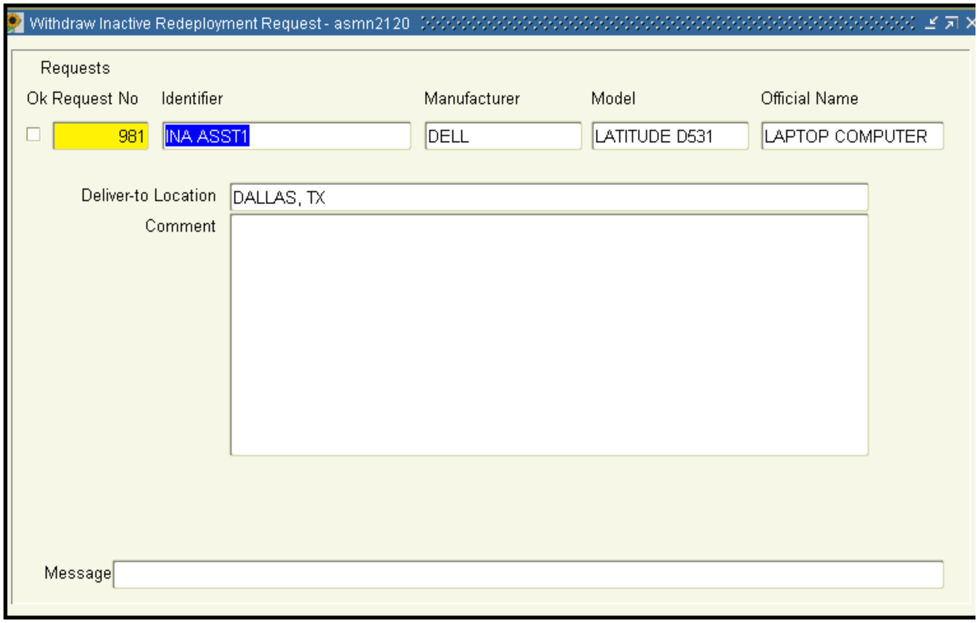
WITHDRAW INACTIVE REDEPLOYMENT REQUESTS

If a request was made to redeploy an asset and that asset cannot be placed back into service, users can withdraw the redeployment request. Use the **Withdraw Inactive Redeployment Request** screen to withdraw a request to re-use an inactive asset.

Scenario: The following graphic illustrates how to withdraw a redeployment request.

NAVIGATION

- Click Inactive
- Click Withdraw Inactive Redeployment Request



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

Step 2. Enter the request number (**901**) 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

Sunflower contains functionality to help organization manage excess property. If an organization chooses to utilize the Excess module, assets within the inactive 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 Inactive assets, the discussion provided in this section addresses the excess process and highlights the nuances of excessing Inactive 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
- Utilize Excess Assets
- Create Excess Asset Reservations

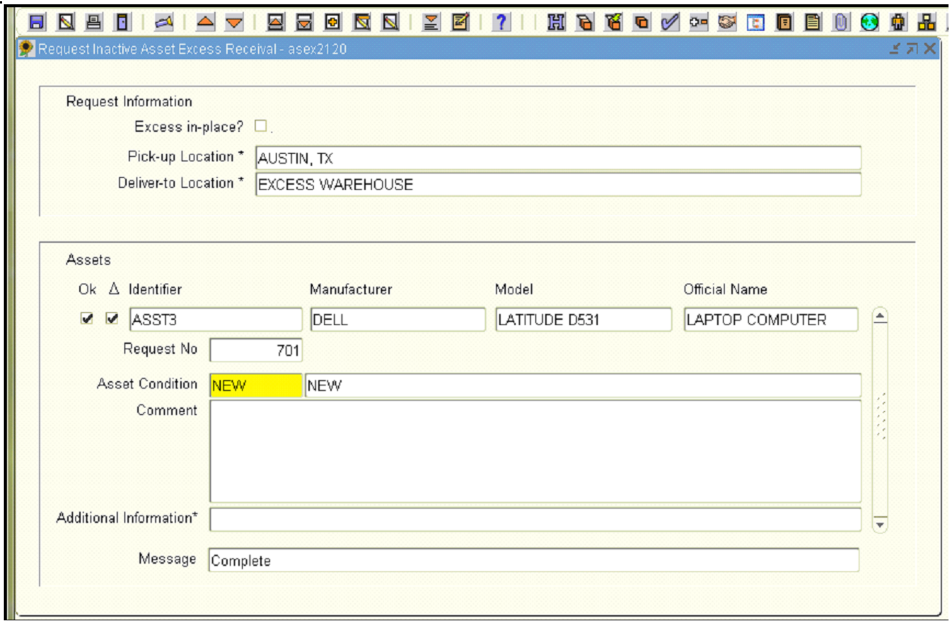
Request Inactive Asset Excess Receival

Recall that users can only work with assets that are a part of the organization to which they belong to or that they are authorized to work with. An authorized user can create an excess receival request and a manager that oversees the disposal of assets can generate the excess assets from the receival request. After creating the request, the system can generate an E-mail to notify the requestor and other interested parties.

Scenario: The following graphic illustrates how to create an excess asset receival request for inactive assets. A request has been sent for a used but in good condition asset (**I0102**) to excess for potential redeployment. The asset should be picked up from its current location and sent to the excess storage facility.

Navigation

- Click Excess
- Click Request Excess Receival
- Click Request Inactive Asset Excess Receival



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

Step 2. Select the **Excess in-place?** checkbox for the asset to remain in its current location but in the Excess state. Selecting this option overrides the **Pick-up Location** and **Deliver-to Location** required fields.

Step 3. Specify the **Pick-up Location** of the asset that to excess by double-clicking in the **Location** field and entering the relevant information.

Step 4. Specify the **Deliver-to Location** of the asset that to excess by double-clicking in the **Location** field and entering the relevant information.

Step 5. Enter the asset identifier of the inactive asset that to excess in the **Identifier** field.

Step 6. Click the Tab key to populate **Manufacturer**, **Model**, and **Official Name**.

Step 7. Select the asset condition that best describes the asset's current state.

Step 8. Use the **Comment** text box to specify any special circumstances or delivery considerations.

Step 9. Double click in the **Additional Information*** field to enter in request UDF information.

Step 10. Click the **Save** icon to save the redeployment request. The system generates a redeployment **Request No** (Number).

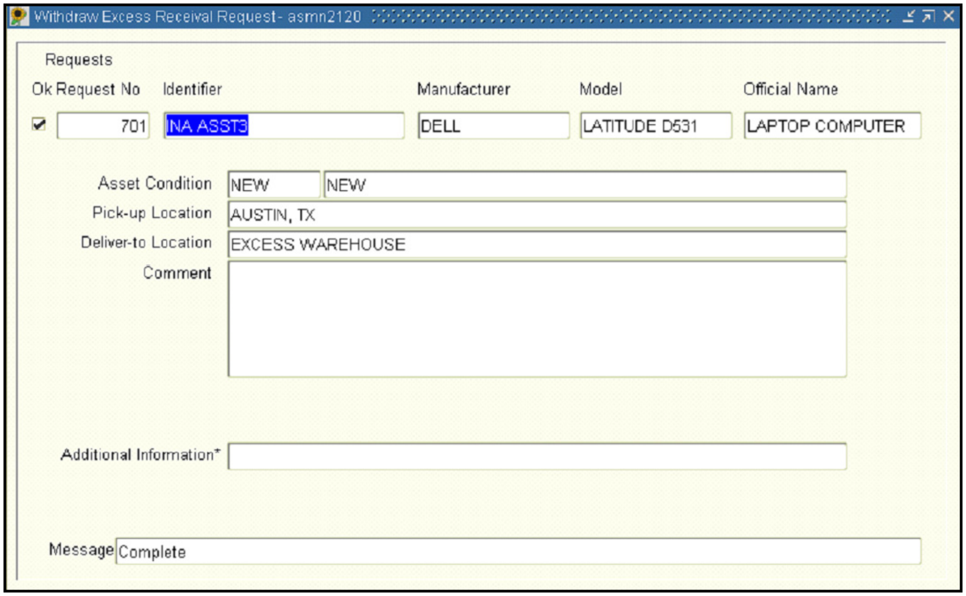
WITHDRAW INACTIVE ASSET EXCESS RECEIVAL

If a request was made to excess an asset and that asset can be placed back into service, users can withdraw the excess request.

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

NAVIGATION

- Click Excess
- Click Withdraw Excess Receival Request



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

Step 2. Enter the request number (**1162**).

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

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

RETIRE INACTIVE ASSETS

Retirement of assets is the process used within Sunflower to physically or financially remove accountability of property from an organization. With Inactive Assets, this could include retiring the Inactive Asset to redeploy it into the field as an Inventory or Agreement Asset.

The following section describes the procedures used to initiate the excess process which includes details on how to:

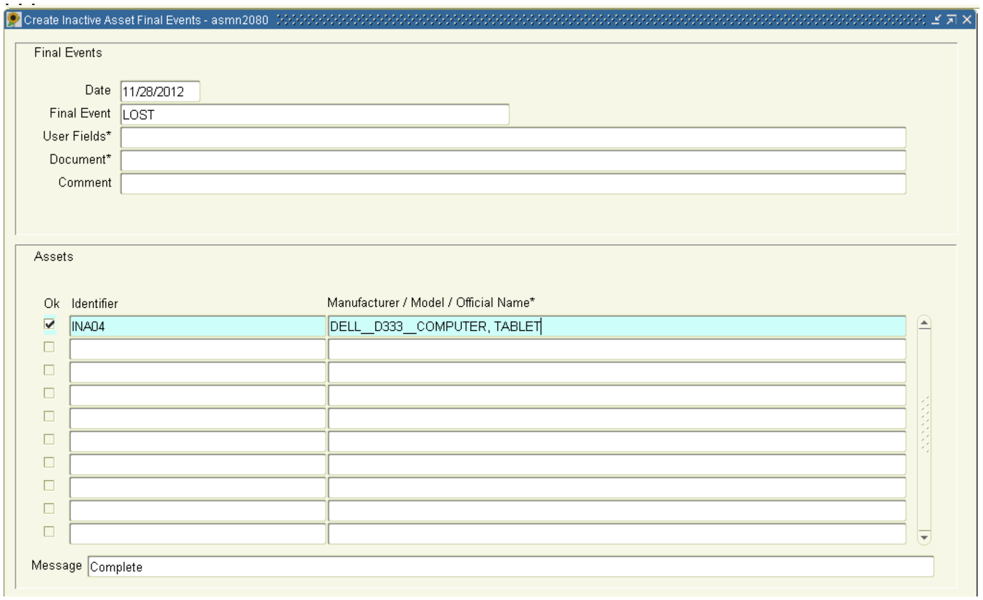
- Create an Inactive Asset Final Event
- Redeploy an Inactive Asset into Service
- Reverse Inactive Asset Final Events
- Reinstate Retired Inactive Assets

CREATE AN INACTIVE ASSET FINAL EVENT

Scenario: The following graphic illustrates how to use the **Create Inactive Asset Final Events** screen to specify the final disposition of an asset, which has been lost.

NAVIGATION

- Click Inactive
- Click Create Inactive Asset Final Events



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

Step 2. Specify the **Date** of the asset final event. The current date is the default value.

Step 3. Select the event type from the list of values (LOV) from the **Asset Final Event** field for the inactive asset.

Step 4. Double-click in the **Document field**, to open the **Maintain Documents** screen and enter the related asset final event document information. Save to close this window.

Step 5. Enter **Comments**, as needed.

Step 6. Enter the identifier of the inactive asset and click the Tab key. The **Manufacturer**, **Model**, and **Official Name** populates.

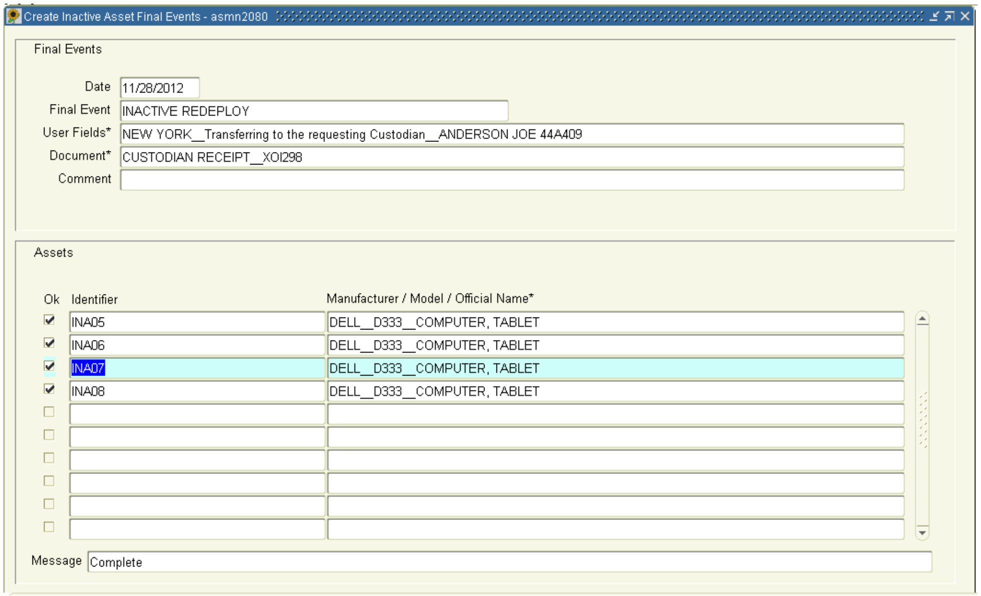
Step 7. Click the **Save** icon to save the final event.

REDEPLOY AN INACTIVE ASSET INTO SERVICE

In many cases an organization may need to redeploy an Inactive Asset back into service as an Inventory or Agreement Assets. In this case, the user will retire the Inactive Asset, and generate a transfer request to the Steward organization that requires the asset.

NAVIGATION

- Click Inactive
- Click Create Inactive Asset Final Events



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

Step 2. Specify the **Date** of the asset final event. The current date is the default value.

Step 3. Select the **Inactive Redeploy** final event type from the list of values (LOV) from the **Asset Final Event** field for the inactive asset.

Step 4. Double-click in the **User fields,** and enter the new **Location, Comments** and **Custodian.**

NOTE: If the asset previously had another Interest, such as Inventory, once saved this will generate a Change Location and Change Custodian request, which the new Custodian can then accept.

Step 5. Double-click in the **Document field**, to open the **Maintain Documents** screen and enter the related asset final event document information. Save to close this window.

Step 6. Enter **Comments**, as needed.

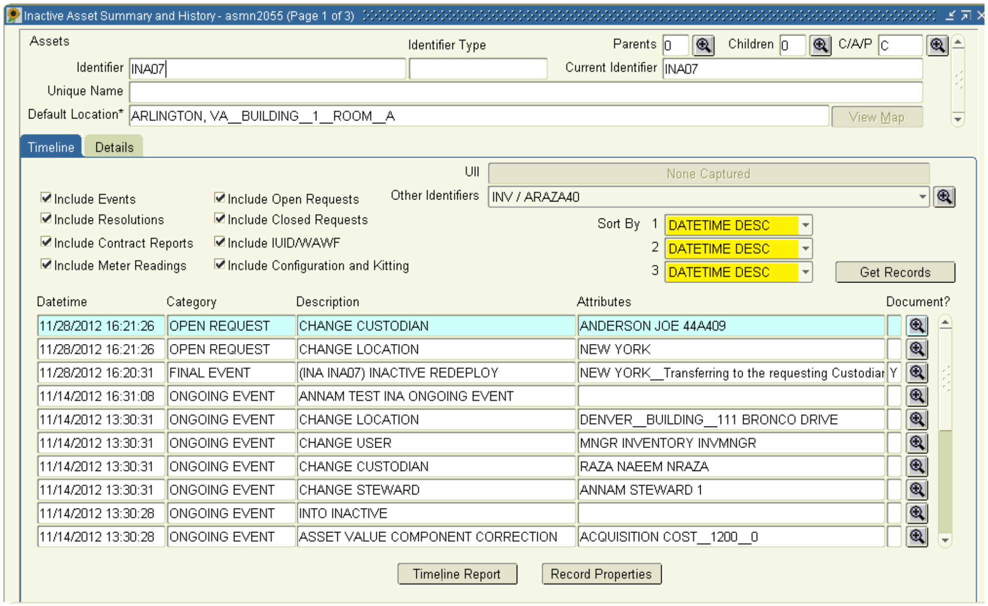
Step 7. Enter the identifier of the inactive asset and click the Tab key. The **Manufacturer**, **Model**, and **Official Name** populates.

Step 8. Click the **Save** icon to save the final event.

NOTE: The Summary and History of an asset with an existing Inventory interest is shown below, with the Open Request Timeline events for Change Location and Change Custodian.

NAVIGATION

- Click Inactive Asset Summary and History

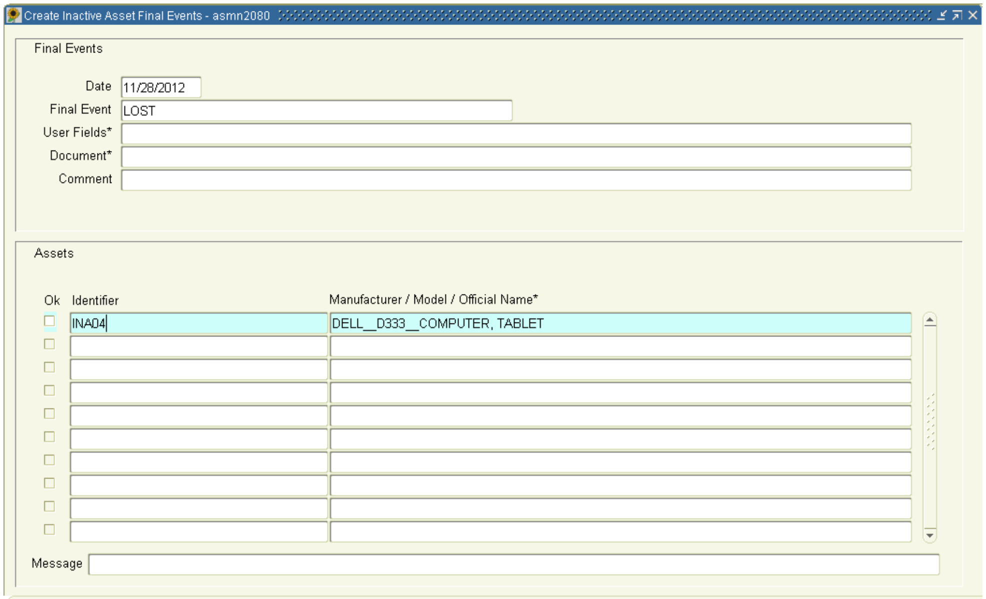


REVERSE INACTIVE ASSET FINAL EVENTS

In the scenario where a user accidentally retires an inactive asset, users can reverse the final event to bring the asset back into Inactive status.

NAVIGATION

- Click Inactive
- Click Create Inactive Asset Final Events



Using the **Create Inactive Asset Final Events** screen.

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

Step 2. Click the **Find** icon to search off the **Date** and **Final Event** type.

Step 3. Click the **Find** icon to search the database.

Step 4. Use the arrow keys on the keyboard or the **Next Record** button to scroll through the records and search for the asset to reverse the Final Event on.

Step 5. Place cursor in the **Identifier** field for the asset to reverse.

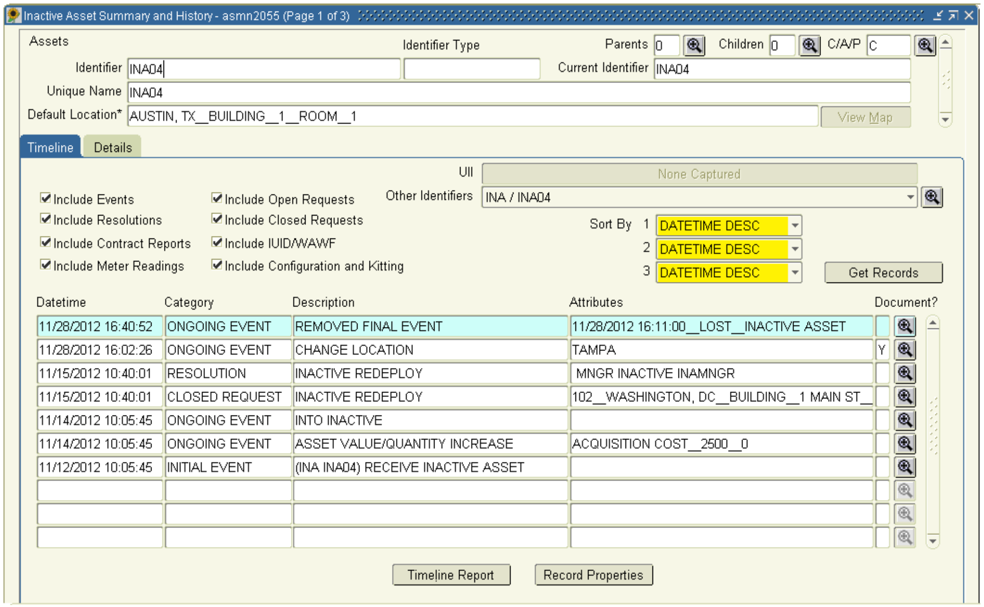
Step 6. Click the **Remove Record** icon to remove the specifically indicated asset record.

Step 7. Click the **Save** icon to reinstate the selected asset.

NOTE: The Summary and History will display a **Removed Final Event** Timeline event, as shown below.

NAVIGATION

- Click Inactive
- Click Inactive Asset Summary and History



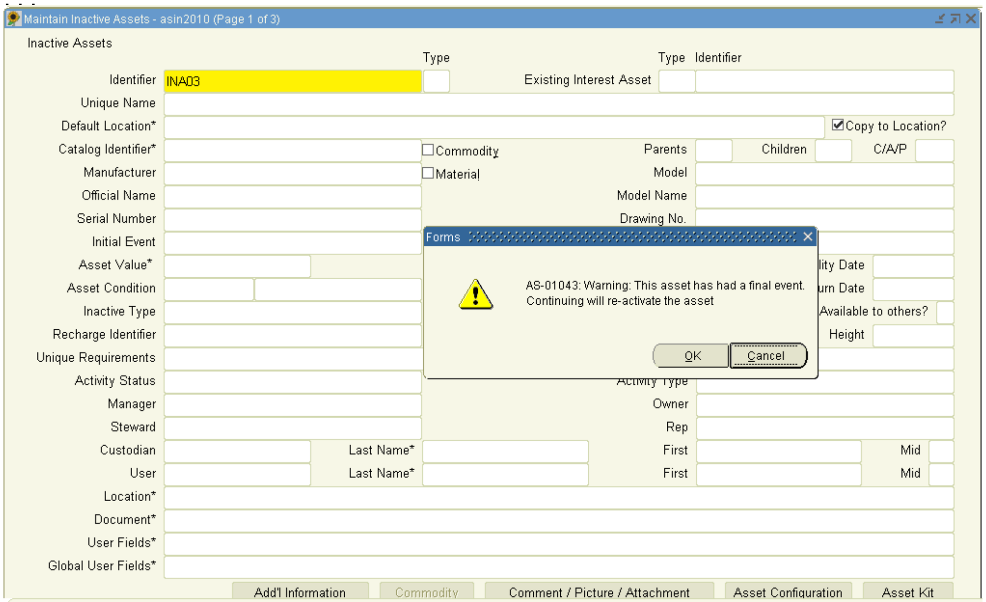
REINSTATE INACTIVE ASSETS

In the event that an Inactive Asset is lost, then found, users can reinstate inactive assets, placing them back into Inactive status.

Use the **Maintain Inactive Assets** screen to reinstate retired assets.

NAVIGATION

- Click Inactive
- Click Maintain Inactive Assets



Step 1. Enter the **Identifier** and **Tab.**

Step 2. Click **OK** to acknowledge re-activation of the asset.

Step 3. Make other updates to the asset as required.

Step 4. Click **Save** to save the record.

INACTIVE REPORTS

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

There are several output options available for the reports.

- PDF (Adobe Acrobat)
- HTML
- Text

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

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

Inactive Assets (Global Information) Report

The **Inactive Assets (Global Information) Report** shows detail and summary information of inactive assets.

Asset Search Report

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

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 value of asset in relation to its configuration structure.

Assets with Pending Excess/Inactive Requests Report

The **Assets with Pending Excess/Inactive Requests Report** list assets with pending inactive/excess requests.

Excess/Inactive Receival Form Report

The **Excess/Inactive Receival Form Report** prints a generic form, with barcode, that can be used for excess and inactive asset pick-up.

Inactive Asset Activity Summary by Asset Flag Report

The **Inactive Asset Activity Summary by Asset Flag Report** summarizes inactive asset activity grouped by asset flag.

Inactive Asset Activity Summary by Asset Type Report

The **Inactive Asset Activity Summary by Asset Type Report** shows the details of inactive asset activity by asset type.

Inactive Asset Initial Events Report

The **Inactive Asset Initial Events Report** shows detailed information for initial events, e.g. material returned, material loaned.

Inactive Asset Ongoing Events Report

The **Inactive Asset Ongoing Events Report** shows detailed information for ongoing events, e.g. maintenance, repairs and mileage captured, for inactive assets for a time period.

Inactive Asset Final Events Report

The **Inactive Asset Final Events Report** shows the details of inactive asset final events, e.g. removed from storage, transferred to excess and abandonment.

Inactive Asset Interface Processing Results Report

The **Inactive Asset Interface Processing Results Report** shows the results of processing the contents of interface table AS_LOAD_INACTIVE_ASSETS.

Inactive Asset Summary by Asset Flag Report

The **Inactive Asset Summary by Asset Flag Report** summarizes inactive asset value and count by asset flag.

Inactive Asset Summary by Asset Type Report

The **Inactive Asset Summary by Asset Type Report** summarizes inactive asset value and count by asset type.

Inactive Asset Timeline Report

The **Inactive Asset Timeline Report** displays the event timeline of inactive assets over a time period.

Inactive Assets Report

The **Inactive Assets Report** shows the details of inactive assets.

Purchase Order Aging Report

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

NOTE: Many of the above reports are similar to those detailed in the Inventory Assets and Agreements Chapters.