



EXCESS ASSETS

Excess is the process used to remove property from an organization and ultimately retire one or more assets. Proper and efficient disposal of excess material is an important and sensitive matter subject to federal regulations. The Excess module enables organizations to create, receive, and manage excess assets. The first step towards retiring an asset is to create an excess request. The excess request signifies the intent to turn an asset into an excess asset and formally dispose of the asset. This chapter discusses the many functions of the Excess module and how to dispose of assets and discharge capital and non-capital obligations.

KEY CONCEPTS

This chapter includes the following discussion points and concepts:

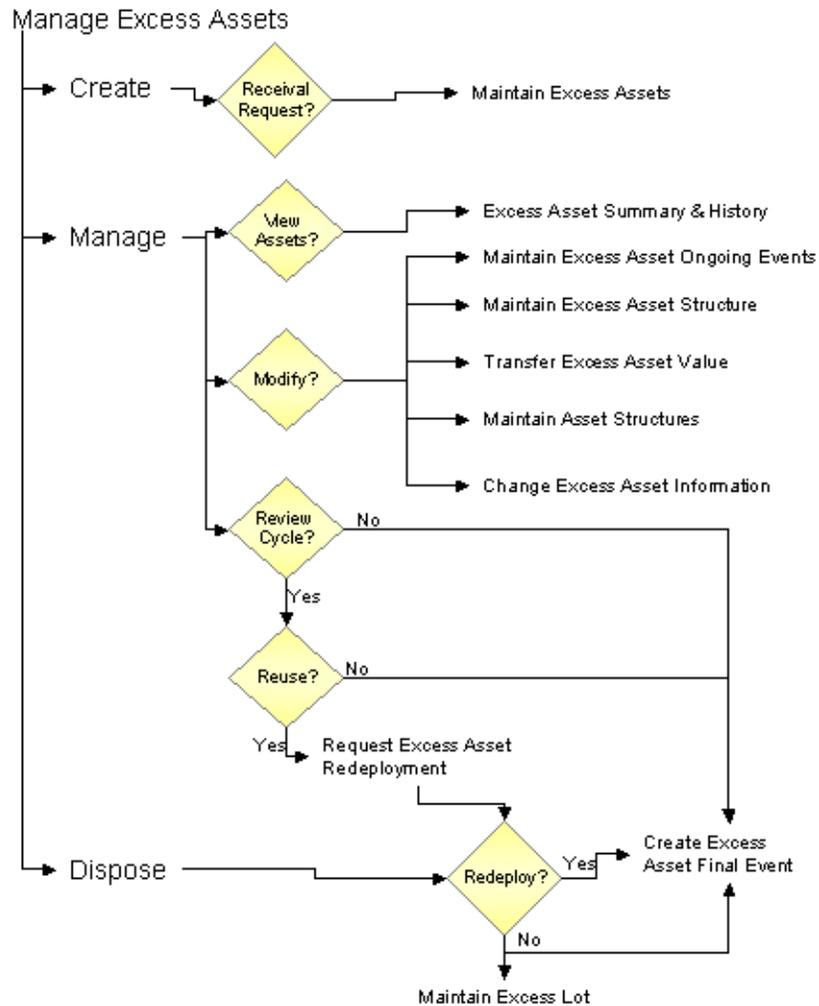
- About Excess Assets
- Excess Roles
- Excess Setup
- Create Excess Assets
- Screen Assets
- Define Screening Periods
- Extend Excess Asset/Batch Review
- Manage Excess Asset Reservations
- Retire Excess Assets
- Excess Reports

ABOUT EXCESS ASSETS

The Excess module is used to create and manage assets that are currently not in-use. The starting point for this chapter is to look at excess receipt requests through the use of reports and the process used to create excess assets from requests. Additionally, this section discusses how to manage assets awaiting disposal throughout the excess review cycle and the process for returning excess assets to in-service or dispose and retire excess assets.

EXCESS MODULE WORKFLOW

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



EXCESS ROLES

Depending upon the organizational structure a small, or centralized, organization may assign its users as Managers who are responsible for performing all or many of the tasks related to excess management. However, larger, or decentralized, organizations may choose to assign users who are responsible for the excess of assets one of the two applicable roles based on the types or number of excess assets for which they are responsible.

For example, one may choose to assign one user who is only responsible for specific excess assets, whether in quantity or type, a limited role (e.g. Excess Clerk) versus another user who has a greater level of responsibility and who manages all excess assets within the system (e.g. Excess Manager).

EXCESS MENU ACCESS

When assigning roles to users, it is important to map out the functional responsibilities of the users and then decided based on the tasks that each user must perform the appropriate role. Only then will the appropriate application roles be able to be assigned. The chart below lists role access to the menu items within the Excess module by the related Excess roles.

MENU ITEM	ROLE		
	EXCESS MANAGER	EXCESS CLERK	ACR
Maintain Excess Assets	Yes	Yes	--
Excess Asset Summary and History	Yes	Yes	Yes
Asset Search	Yes	Yes	Yes
Maintain Catalog Entries*	--	--	--
Change Excess Asset Information	Yes	Yes	--
Transfer Excess Asset Value	Yes	Yes	--
Maintain Excess Asset Ongoing Events	Yes	Yes	--
Create Excess Asset Final Events	Yes	Yes	--
Edit Excess Asset Interface Records	Yes	Yes	--
Process Excess Asset Interface Records	Yes	Yes	--
Process Excess Asset PO Interface Records	Yes	Yes	--
Edit Asset Value Component Interface Records	Yes	Yes	--
Batch Excess Assets	Yes	Yes	--
Extend Excess Asset/Batch Review	Yes	Yes	--
Create Excess Asset Reservation	Yes	Yes	Yes
Maintain Excess Asset Reservations	Yes	Yes	Yes
Maintain Excess Review Requirements	Yes	--	--
Maintain Excess Review Rules	Yes	--	--
Maintain Excess Lot Masters	Yes	Yes	--
Maintain Excess Lots	Yes	Yes	--
Create Excess Lot Final Events	Yes	Yes	--
Request Excess Receival	--	--	Yes
Withdraw Excess Receival Request	--	--	Yes
Deny Excess Receival Request	Yes	Yes	--
Maintain Asset Structures	Yes	Yes	Yes
Search Map	Yes	Yes	Yes
Excess Reports	Yes	Yes	Yes

*Excess Clerks and Managers have access to the **Maintain Catalog Entries** screen if assigned the AS_CATALOGER role.

EXCESS MANAGER VS. EXCESS CLERK

What is the difference between the manager and clerk roles? The table above illustrates that both roles have almost the exact same type of access within the Excess module. The difference between the two roles is only apparent when taking into account the organizational structure. The Excess Manger has access to and can manipulate (create, update, retire) excess assets throughout the organization. On the other hand, the Excess Clerk has just about the same capabilities as that of the Excess Manager but only for those organizations for which the clerk has an assigned responsibility.

EXCESS SETUP

Before using the Excess module, there are several setup steps to complete that include:

- Define Excess Review Categories
- Define Asset Conditions
- Define Excess Review Rules
- Define Excess Review Types
- Define Excess Review Requirements

DEFINE EXCESS REVIEW CATEGORIES

The first step to setting up the Excess module is to define the **Excess Review Categories**. Think of it as splitting the stream of assets coming into the excess center into smaller streams based on certain rules. Assets that have little value may go directly to **Scrap** or **Salvage**. Assets that do have value may be screened for reuse, and then sold if no one (within the organization) wants them. There may be special governmental requirements for some assets (usually based on dollar value) to be listed on the federal GSA system (called EADS or FEDS) for a time before they may be disposed.

NAVIGATION

- Click Admin
- Click Domains
- Click Maintain Domains

Id Code	Description	Begin Date	End Date
5000000784	EADS	09/18/2011	
5000000780	EXPEDITED	09/18/2011	
5000000781	NON REP	09/18/2011	
5000000783	NORMAL	09/18/2011	
5000000782	SCRAP	09/18/2011	

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

Step 2. Click the **Find** icon and then click the **Next Record** icon until the appropriate value in the **Name** field displays.

Step 3. Create several **Excess Review Categories** as shown above.

Step 4. In this example, there are three separate sub-streams.

- Assets that have value, but are not required to post on the GSA system.
- Assets that have value and need to be listed at GSA before they may be disposed.
- Assets that have little value and will go directly to final disposition (will not be screened at all).



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

DEFINE ASSET CONDITIONS

Asset Conditions are used to describe the current state of an asset (e.g. new, used, salvage etc.). The asset conditions table is used as a LOV for one of the rules related to excess assets. The only asset condition that is defined from the factory is **UNKNOWN**.

Scenario: The following graphic illustrates how to create the asset conditions.

NAVIGATION

- Click Admin
- Click Domains
- Click Maintain Asset Conditions

Id	Code	Description	Rank	Begin Date	End Date
50000001363	1	UNUSED - GOOD	1		
50000001364	2	UNUSED - FAIR	2		
50000001365	3	UNUSED - POOR	3		
50000001366	4	USED - GOOD	4		
50000001367	5	USED - FAIR	5		
50000001368	6	USED - POOR	6		
50000001369	7	REPAIRS REQUIRED - GOOD	7		
50000001370	8	REPAIRS REQUIRED - FAIR	8		
50000001371	9	REPAIRS REQUIRED - POOR	9		
50001242877	DATE	DATE CONDITION	12	08/01/2012	10/01/2012
50000001372	S	SALVAGE	10		
303083	UNK	UNKNOWN	999		
50000001373	X	SCRAP	11		

Step 1. Navigate to **Maintain Asset Conditions** screen.

Step 2. Click the **Find** icon twice.

Step 3. Provide values for the **Code**, **Description** and **Rank** for each asset condition.

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

NOTE: The most common codes in use by government today are shown in the above example. The **Rank** field is used to measure comparisons in the rule definitions, rather than the actual code. This allows numeric codes to be combined with alphanumeric ones, and still be able to specify ranges in the rules.

DEFINE EXCESS REVIEW RULES

Use the **Maintain Excess Review Rules** screen to create rules that define each asset review category required for the organization. Use standard criteria such as the minimum and maximum age, acquisition value, and condition to create the rules. Additionally, use **User Defined Fields** to add criteria specific to the organization's **Business Rules** and **Regulations**. Now, set up the rules for each of the **Excess Review Categories**.

NAVIGATION

- Click Excess
- Click Maintain Excess Review Rules

Excess Review Categories						
Rw Category <input type="text"/>						
Excess Review Rules						
Min Age Yrs	Max Age Yrs	Minimum Acquisition Value	Maximum Acquisition Value	Best Condition	Worst Condition	User Fields*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Step 1. Navigate to the **Maintain Excess Review Rules** screen.

Step 2. Click the **Find** icon twice.

Step 3. Click the **Next Record** icon until reaching the appropriate category.

Step 4. Enter the **Minimum Acquisition Value**.

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

NAVIGATION

- Click Excess
- Click Maintain Excess Review Rules

Excess Review Rules						
Min Age Yrs	Max Age Yrs	Minimum Acquisition Value	Maximum Acquisition Value	Best Condition	Worst Condition	User Fields*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Step 6. Click the **Previous Block** icon, then the **Next Record** icon to navigate to the next **Excess Review Category**.

NOTE: Multiple rules entered on one line are treated as a Boolean “AND” condition, those on separate lines are treated as a Boolean “OR”.

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

NAVIGATION

- Click Excess
- Click Maintain Excess Review Rules

Min Age Yrs		Max Age Yrs		Minimum Acquisition Value	Maximum Acquisition Value	Best Condition	Worst Condition	User Fields*
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				

Step 8 Click the **Previous Block** icon, then the **Next Record** icon until reaching the appropriate review category.

Step 9 Specify the appropriate **Excess Review Rules**.

Step 10 Click the **Save** icon.

DEFINE EXCESS REVIEW TYPES

After defining excess asset sub-streams and their rules, one must define what happens to each stream. Begin by defining a code table. Generally, when an asset comes into the excess center that is suitable for reuse, an attempt is made to locate people who will be willing to claim and reuse the asset. Usually, priority is first given to those that would benefit the organization most, if an asset is reissued.

A typical scenario for a government organization is as follows:

The organization that actually purchased the asset is given first shot. Then other governmental organizations in a larger and larger scope, widening out like the layers of an onion. Each group involved is given a certain amount of time in which they may claim the asset exclusively, before including the next group. People in the higher priority groups can still claim assets when lower priority groups are included, but if they wait that long they will have to compete on an even basis with those groups. Reservations are automatically made on a first come, first served basis (individual reservation priorities can be adjusted, if necessary. But this has to be done manually).

NAVIGATION

- Click Admin
- Click Maintain Domains

The screenshot shows a web application window titled 'Maintain Domains - saad0010'. The 'Name' field is set to 'EXCESS REVIEW TYPE'. Below it is a table with the following data:

Id	Code	Description	Begin Date	End Date
50001016716	AGENCY	AGENCY		
50001016717	GSA	GSA		
50001016715	INTERNAL	INTERNAL		
50001016719	LOC 01	LOCAL 01		
50001016720	LOC 02	LOCAL 02		
50001016721	LOC 03	LOCAL 03		
50001016722	LOC 04	LOCAL 04		
50001016723	LOC 05	LOCAL 05		
50001016724	LOC 06	LOCAL 06		
50001016725	LOC 07	LOCAL 07		
50001016726	LOC 08	LOCAL 08		
50001016727	LOC 09	LOCAL 09		
50001016728	LOC 10	LOCAL 10		
50001017666	LOC XX	LOCAL XX		
50001016718	STATE	STATE		

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

Step 2. Click the **Find** icon once.

Step 3. Click the **Next Record** icon until the appropriate **Name** field displays.

Step 4. Define the **Excess Review Types**.

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

DEFINE EXCESS REVIEW REQUIREMENTS

The next process for setting up the excess module is to define the screening periods that will occur for each **Excess Review Category** (sub-stream). This process enables one to specify which groups of people will have an opportunity to select and reuse assets in the excess process for a specified period of time. The definition created will allow the first group of people, internal to the owning organization, to have the first opportunity to reuse excess assets. This group will have 30 days in which they have exclusive access to new excess assets. After that initial screening period, access to these assets is opened up to local government and schools for another 30 days. After that screening period, if no one from either group has claimed the asset, it will be listed on the GSA system for 60 days. Use the **Maintain Excess Review Requirements** screen to define screening category types and to create or modify the duration of each *phase* of the screening period for a given category. Each phase is known as a **review type**.

NAVIGATION

- Click Excess
- Click Maintain Excess Review Requirements

Review Type	Rank	Review Days
AGENCY	1	30
INTERNAL	1	30
GSA	2	30
STATE	2	21
LOCAL 01	3	10
LOCAL 02	3	10
LOCAL 03	3	10
LOCAL 04	3	10
LOCAL 05	3	10

Step 1. Navigate to the **Maintain Excess Review Requirements** screen.

Step 2. Click the **Find** icon twice.

Step 3. Click the **Next Record** icon until the appropriate **Review Category** displays.

Step 4. Add **Excess Review Types** for the review category.

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

Scenario: If no one has claimed an asset for the entire length of time it has spent in the various screening periods (after 120 days in this case), then the asset will be available for public sale or disposal. We have done our best to reuse the asset, but now it still has to be gotten rid of (and recover whatever value possible).

NAVIGATION

- Click Excess
- Click Maintain Excess Review Requirements

Review Type	Rank	Review Days
AGENCY	1	30
INTERNAL	1	30
GSA	2	30
STATE	2	21
LOCAL 01	3	10
LOCAL 02	3	10
LOCAL 03	3	10
LOCAL 04	3	10
LOCAL 05	3	10

Step 6. Click the **Previous Block** icon and then click the **Next Record** icon until the **Review Category** displays the appropriate category.

Step 7. Add **Excess Review Types** for the category, as shown above.

Step 8. Select the appropriate **Rank** for the category.

Step 9. Enter the number of applicable days for review in the **Review Days** field.

Step 10. Click the **Save** icon.

NOTE: It is possible for two or more screening periods to run concurrently. This may be done by simply assigning them the same **Rank** number. An asset will be considered to be in both screening periods at the same time, when it is at that point in its excess processing.

Step 11 Click the **Previous Block** icon and then click the **Next Record** icon until the appropriate **Review Category** displays.

NAVIGATION

- Click Excess
- Click Maintain Excess Review Requirements

Review Type	Rank	Review Days
AGENCY	1	30
INTERNAL	1	30
GSA	2	30
STATE	2	21
LOCAL 01	3	10
LOCAL 02	3	10
LOCAL 03	3	10
LOCAL 04	3	10
LOCAL 05	3	10

Result: The excess environment is now set up and ready to be used for creating excess assets.

CREATE EXCESS ASSETS

An excess asset is any asset that is being prepared to remove (dispose of) from the organization. Use the Excess menu to manage all asset disposal activities. The first step in the excess process is the creation of an excess asset. Excess assets can be created in several ways, such as:

- **Create From Scratch**

Use the **Maintain Excess Assets** screen to create an excess asset from scratch. This is the same process as creating any other interest asset from scratch. This procedure will not be covered in this chapter since it has been discussed thoroughly in the Inventory Management chapter.

- **Create From Another Interest Asset**

Receive assets into excess that have already been entered into Sunflower Assets; this is likely to be the most common method that will be used in order to create excess assets from inventory, or other asset types, within the system.

- **Create From An Excess Receival Request**

Another common method used to create excess assets is the creation of an excess asset from an excess receival request. Assets can be received into excess directly from a request entered by a user who does not have the direct ability to create an excess asset.

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

Maintain Excess Assets Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
Identifier	Identifier assigned to an Excess asset (e.g. barcode, tag number, decal, or property identification number).
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. Organizations 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, staff can be alerted 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. Asset identifier types must be created before assigning them throughout the application.

Maintain Excess Assets Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
Existing Interest Asset Type Identifier	<p>Specifies the type of interest asset (e.g. inventory, agreement, inactive, excess etc.) Leave blank if this asset record does not exist in the systems as another interest asset type.</p> <p>For example, users may have an Inactive asset with its own Inactive Asset Identifier that users want to convert into an Excess asset. Users can reference an existing inactive interest asset Type with its corresponding inactive interest asset identifier and Sunflower populates all of the corresponding information for that asset in the Maintain Excess Assets fields.</p>
Unique Name	<p>The Unique Name is a data set on items that is globally unique, unambiguous and robust enough to ensure that information is consistent through the life cycle of the asset and supports the multifaceted business applications and users.</p>
Default Location*	<p>Specifies the default location for an excess 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.</p>
Catalog Identifier*	<p>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.</p> <p>For more information about Catalog Entries, see the Catalog Management chapter of the Sunflower Enterprise Administration Guide.</p>
Commodity	<p>The Commodity asset checkbox is marked if the asset is designated as an asset using the Commodity button at the bottom of this page.</p>
Parents	<p>The Parents field displays the number of parent records for the current asset record that is being viewed. If an asset has a parent asset association, the number of associations displays in the Parents field. An asset can have multiple parents.</p> <p>Double click in the Parents field to view the detail parent record information on the Maintain Asset Structures screen where the parent record information can be viewed for the selected asset.</p>
Children	<p>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.</p> <p>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.</p>
C/A/P	<p>The C/A/P field indicates if there is a comment C, attachment A, or picture P attached to the selected excess asset record.</p>
Manufacturer	<p>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.</p>
Model	<p>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.</p>

Maintain Excess Assets Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
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 the case of a Purchase Initial Event, for example, the User Field may be extended to capture information on 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.
Asset Value*	<p>Double-click to open the Asset Value Components block and specify the asset value components.</p> <p>Asset Value Types are Domains that 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.).</p> <p>Enter the cost of the asset. Do not enter \$, commas, or .00. 1500 is the same as \$1,500.00.</p> <p>Users can use the Administration module to extend the Asset Value Component user defined field (User Fields) to accommodate the business practices.</p> <p>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.</p>
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	<p>Used to specify the current working quality of the property. Select from the list of values the appropriate condition of the asset.</p> <p>If users cannot find the appropriate selection, users can create the value in the Administration module by using the Maintain Asset Conditions screen.</p> <p>For more information about Asset Conditions, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.</p>
Effective Date	The date that the asset becomes active in the Sunflower database. MM/DD/YYYY format. Double-click to use the Calendar function to select the date from Calendar pop-up window.

Maintain Excess Assets Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
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.
Lot Identifier	When an asset has been placed into a Lot for disposal purposes, (e.g. Auction, Sale, Donation, etc.), this field displays the identifier of the Lot.
Flags*	<p>Double-click to open the Asset Flag complex field to specify special conditions for the asset. (e.g. sensitive, hazardous etc.) Leave blank if there are no special conditions to apply to the asset. In this case, the computer has been marked as sensitive. Although the computer itself may be benign, the data residing on the computer hard drive may be of a sensitive nature.</p> <p>To add asset flags, use the Administration module Define Asset Flags screen. (Other typical flags might be Flammable, Keep Dry, Corrosive, etc.)</p> <p>For more information about Asset Flags, see the User Extensibility chapter of the Sunflower Enterprise Administration Guide.</p>
Review Category	To begin an asset's screening process, users should select a Review Category, such as Full Screening, Computers for Learning, or Scrap.
Batch/Line	Once an excess asset is batched for screening, this field displays the Batch and Line the asset is in.
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.
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.
Location*	<p>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.</p> <p>For more information about setting up locations, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.</p>
Document*	<p>Enter the related asset Document* information such as type of supporting documentation, documentation identifier, storage type and organization for an asset.</p> <p>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.</p> <p>For more information about defining up document types, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.</p>

Maintain Excess 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 information specific to the configuration parameters of this asset.
Asset Kit	Click to open Asset Kit screen and enter information specific to the kitting parameters of this asset.

CREATE EXCESS ASSETS FROM OTHER INTEREST ASSETS

Use the **Maintain Excess Assets** screen to create excess assets directly from another property record within the system. When creating an asset from another interest asset one has the option to rename the asset should it be beneficial to the organization.

Renaming (or retagging) of the asset enables one to track the asset based on naming conventions that are specific to the organization versus that of another organization that may be, or may have been, responsible for the asset at a point in time during the assets lifecycle. For example, the excess department may have a certain set of naming conventions that it uses to track assets that are sent to them for disposal in comparison to the naming convention specified for the asset at its time of origination. Renaming an asset is optional and should be based upon the business processes and procedures. Renaming does not remove any other identifiers associated to the asset and as a result, each organization can continue to track an asset based on the naming convention by which they know the asset.

Scenario: The following graphic illustrates how to create an excess asset in order to begin the disposal process to discard an asset that is no longer needed by the organization. Inventory asset XX31 has been released to excess. Create an excess asset with an identifier of EXX31.

NAVIGATION

- Click Excess
- Click Maintain Excess Assets

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

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

Step 3. Enter the type and ID of the existing asset in the **Existing Interest Asset Type** and **Identifier** field.

Step 4. Enter the asset's information accordingly.

Step 5. Click the **Save** icon to create the "new" Excess Asset.

REQUEST INACTIVE ASSET EXCESS RECEIVAL

Unless one is an Excess Manager or Excess Clerk, they will not have the ability to directly create an excess asset as described in the prior section. As a result, it is likely that those individuals that want to dispose of assets will create a request to the Excess department/group in order to receive the desired assets into excess. Therefore, based upon one's role within the organization when an asset is no longer useful, one will create a request for an excess asset, commonly called an Excess Receival Request. Later, when the asset has been disposed of or transferred out of the organization, the asset will be retired and any capital asset retirements will be reviewed and posted to the financial management system.

Excess receival requests enable users who do not have the authority to directly create an excess asset to request an asset for disposal. Users can only work with assets that are a part of the organizations to which they belong or are responsible. In this manner, a user can create an excess receival request to authorized personnel who can generate excess assets from the receival requests. Excess receival requests can be made for other interest assets (inventory, inactive etc.) property records to the excess group. The Excess group can in turn decide to accept or deny these requests.

Below is a sample of the **Excess Receival Request** screen that individuals outside of the Excess group use to request the disposal of their assets.

NAVIGATION

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

Request Inactive Asset Excess Receival - asex2120

Request Information

Excess in-place?

Pick-up Location *

Deliver-to Location * LIVERMORE, CA_BUILDING_EXCESS_ROOM_RC

Assets

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

Request No

Asset Condition

Comment

Additional Information*

Message

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

Step 2. In the **Request Information** block, determine if the asset should be excessed in place by selecting the **Excess in-place** checkbox.

Step 3. If the asset will not be excessed in place, enter the appropriate **Pick up Location*** and **Deliver to Location***.

Step 4. In the **Assets** block, enter the **Identifier** of the asset to be excessed. Press tab.

NOTE: The **Manufacturer**, **Model Number** and **Official Name** will populate based on the Identifier selected.

Step 5. Select the appropriate **Asset Condition** from the LOV.

Step 6. Optionally, enter a supporting **Comment**.

Step 7. Optionally, if extended, enter **Additional Information***.

Step 8. Click **Save**.

NOTE: A request number will generate in the **Request No** field. Record this number for reference.

NOTE: The following section will take a look at the report that can be used to view Excess Requests that are in the system and are awaiting approval by the Excess organization.

EXCESS RECEIVAL FORM

Use the **Excess Receival Form** report to view those assets for which excess requests have been created. Another useful report is the **Assets with Pending Excess Requests** report which provides summary information about newly created excess asset requests. The difference between the two reports is the level of detail each report provides.

The **Excess Receival Form** report provides a more detailed view where each excess request is displayed on a single page with details such as barcodes and signature lines, which are particularly useful when sending representatives into the field to pick up assets, especially where sign off is required (signature lines and other details are provided in the comments area). Also notice that this report contains the asset's barcode which can be very useful when using barcode scanning technology. The barcodes on the report allow the use of the report to scan the asset into excess using tools such as Sunflower ExcessTrak.

The following reports can be used to view and manage excess receival requests:

- **Excess Receival Form** report
- **Assets with Pending Excess/Inactive Requests** report

EXCESS RECEIVAL FORM SAMPLE REPORT

Sunflower Enterprise	Excess Receival Form																					
ASMN6110		05/26/2006 14:51																				
1004																						
																						
: : : 07/05/1998																						
<table border="0" style="width: 100%;"> <tr> <td style="width: 50%;">Identifier : INV 0131</td> <td style="width: 50%;">Model : T11209</td> </tr> <tr> <td>Manufacturer : TEKTRONIX</td> <td>Asset Type : LABORATORY EQUIPMENT</td> </tr> <tr> <td>Official Name : OSCILLOSCOPE</td> <td>UoM :</td> </tr> <tr> <td>Quantity :</td> <td>Value : \$ 4,750.00</td> </tr> <tr> <td>Description :</td> <td>Acquisition Date : 01/01/1990</td> </tr> <tr> <td>Serial Number : 01</td> <td>Owner : SUNFLOWER SYSTEMS</td> </tr> <tr> <td>Flags :</td> <td>Rep :</td> </tr> <tr> <td>Manager : SUNFLOWER SYSTEMS</td> <td>Phone : 925.371.0136</td> </tr> <tr> <td>Steward : SUNFLOWER SYSTEMS</td> <td>Alternate Phone : 510.220.8432</td> </tr> <tr> <td>Custodian : PRAZIER TIMOTHY M 050167</td> <td></td> </tr> </table>			Identifier : INV 0131	Model : T11209	Manufacturer : TEKTRONIX	Asset Type : LABORATORY EQUIPMENT	Official Name : OSCILLOSCOPE	UoM :	Quantity :	Value : \$ 4,750.00	Description :	Acquisition Date : 01/01/1990	Serial Number : 01	Owner : SUNFLOWER SYSTEMS	Flags :	Rep :	Manager : SUNFLOWER SYSTEMS	Phone : 925.371.0136	Steward : SUNFLOWER SYSTEMS	Alternate Phone : 510.220.8432	Custodian : PRAZIER TIMOTHY M 050167	
Identifier : INV 0131	Model : T11209																					
Manufacturer : TEKTRONIX	Asset Type : LABORATORY EQUIPMENT																					
Official Name : OSCILLOSCOPE	UoM :																					
Quantity :	Value : \$ 4,750.00																					
Description :	Acquisition Date : 01/01/1990																					
Serial Number : 01	Owner : SUNFLOWER SYSTEMS																					
Flags :	Rep :																					
Manager : SUNFLOWER SYSTEMS	Phone : 925.371.0136																					
Steward : SUNFLOWER SYSTEMS	Alternate Phone : 510.220.8432																					
Custodian : PRAZIER TIMOTHY M 050167																						
Asset Condition : USED - GOOD																						
Pick-up Location LIVERMORE BUILDING : E ROOM : 220	Deliver-to Location LIVERMORE BUILDING : 2000 ROOM : RCV																					
Comment :																						
HAZARDOUS WASTE APPROVAL _____ DATE _____																						
TRANSPORTATION APPROVAL _____ DATE _____																						
ASSET CENTER REPRESENTATIVE APPROVAL _____ DATE _____																						

ASSETS WITH PENDING EXCESS/INACTIVE REQUESTS

The Assets With Pending Excess/Inactive Requests report provides similar information to the Excess Receival Form report, but in a summarized fashion. This report provides only the essential elements required to review the request for disposal.

Request No	Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value
1004	INV 0131		OSCILLOSCOPE	TEKTRONIX	T11209	01	\$ 4,750.00
Asset Condition : 4 USED - GOOD Steward : SUNFLOWER SYSTEMS Custodian : FRAZIER TIMOTHY M 050167 User : Pick-up Location : LIVERMORE BUILDING : E ROOM : 220							
Request : EXCESS RECEIVAL Requester : OWNER REPOSITORY Requester Phone : Deliver-to Location : LIVERMORE BUILDING : 2000 ROOM : RCV							
1063	INV 0151		COMPUTER MINI	HEWLETT-PACKARD	9000	99701	\$ 3,900.00
Asset Condition : Steward : SUNFLOWER SYSTEMS Custodian : FRAZIER KRISTEN S 020966 User : Pick-up Location : LIVERMORE BUILDING : G ROOM : 200							
Request : INACTIVE RECEIVAL Requester : OWNER REPOSITORY Requester Phone : Deliver-to Location : LIVERMORE BUILDING : INACTIVE ROOM : RCV							
1005	INV 0231		OSCILLOSCOPE	TEKTRONIX	T11209	02	\$ 4,750.00
Asset Condition : 4 USED - GOOD Steward : SUNFLOWER SYSTEMS Custodian : FRAZIER TIMOTHY M 050167 User : Pick-up Location : LIVERMORE BUILDING : E ROOM : 220							
Request : EXCESS RECEIVAL Requester : OWNER REPOSITORY Requester Phone : Deliver-to Location : LIVERMORE BUILDING : 2000 ROOM : RCV							
1064	INV 0251		COMPUTER MINI	HEWLETT-PACKARD	9000	99702	\$ 3,900.00
Asset Condition : Steward : SUNFLOWER SYSTEMS Custodian : FRAZIER KRISTEN S 020966 User : Pick-up Location : LIVERMORE BUILDING : G ROOM : 200							
Request : INACTIVE RECEIVAL Requester : OWNER REPOSITORY Requester Phone : Deliver-to Location : LIVERMORE BUILDING : INACTIVE ROOM : RCV							

CREATE EXCESS ASSETS FROM RECEIVAL REQUESTS

Assets can be received into excess directly from a request entered by another user. Use the **Maintain Excess Assets** screen to create the excess asset from the receipt request by using the Asset Request Number (ASR). The ASR is a unique identifier that is system generated from excess (and inactive) receipt requests.

NAVIGATION

- Click Excess
- Click Maintain Excess Assets

Excess Assets

Excess Identifier: SDHINV1

Type: Existing Interest Asset (Type Identifier: ASR 161)

Unique Name: [Empty]

Default Location*: [Empty]

Catalog Identifier*: 2

Manufacturer: DELL

Official Name: COMPUTER, TABLET

Serial Number: 98099089

Initial Event: RECEIVE EXCESS ASSET

Asset Value*: \$1,500.00

Asset Condition: 4 USED - GOOD

Lot Identifier: [Empty]

Rww Category: [Empty]

Manager: SUNFLOWER SYSTEMS

Steward: SUNFLOWER SYSTEMS

Custodian: [Empty] Last Name*: [Empty]

User: [Empty] Last Name*: [Empty]

Location*: NEW YORK

Document*: [Empty]

User Fields*: [Empty]

Global User Fields*: [Empty]

Commodity:

Parents: 0 Children: 0 C/A/P: [Empty]

Model: D333

Model Name: [Empty]

Drawing No.: [Empty]

User Fields*: [Empty]

Acquisition Date: 12/07/2012

Effective Date: 12/07/2012

Responsibility Date: 12/07/2012

Expected Return Date: [Empty]

Flags*: [Empty]

Batch/Line: [Empty] / [Empty]

Owner: SUNFLOWER SYSTEMS

Rep: LAST NAME THAT IS LIKE LEYRES THAT IS

First: [Empty] Mid: [Empty]

First: [Empty] Mid: [Empty]

Buttons: Add1 Information, Commodity, Comment / Picture / Attachment, Asset Configuration, Asset Kit

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

Step 2. Enter a new identifier for the excess asset.

Step 3. Enter **ASR** (asset request number) in the **Type** field of the asset to be excessed.

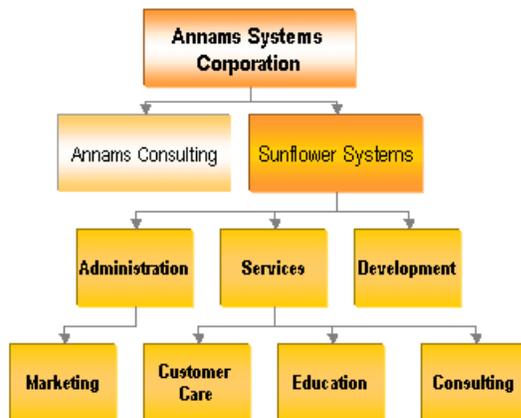
Step 4. Enter the ASR identifier in the **Existing Asset Identifier** field. Click the **Tab** key. The form auto-populates with data based on the ASR.

Step 5. Click the **Save** icon to create the Excess Asset.

SCREEN ASSETS

Screening is an integral part of the excess process that enables users to inform internal and external organizations about excess assets that are available for reuse. Screening periods are generally categorized into two sections, internal and external screening. Internal screening is a period in which first priority is given to a designated organization or group of organizations (such as intra-organizational screening). The external screening period enables users to offer assets that are intended to retire to a broader group of potential parties who may be interested in redeploying the asset for their own use. The types of assets and the extent and duration in which organizations have access to review excess assets will be defined by the user, based on the organization's Business Procedures and Policies.

For example:



The organization called Sunflower Assets has internal and external screening periods defined for excess assets as follows:

Internal Screening (within the organization)

Excess assets, with the exception of security equipment (e.g. computer equipment), could have a 10-day *internal departmental* screening period to determine whether the assets can be reutilized. Assets that are not considered security equipment will have a 10-day *departmental* screening period during which the assets will be made available to departments that roll up to

Sunflower Assets (e.g. Marketing, Development, Consulting, etc.). The screening process will consist of posting available excess assets to a page on the Sunflower Assets intranet. If one of the organizations within Sunflower Assets is interested in a posted excess asset then the custodian of that organization will make a request to the excess department for that asset and arrange for receipt of the property. Once the asset is picked up or received by the requestor, the excess department will record the retirement of the excess asset.

If the asset is considered security equipment, then a diagnostic test is performed in order to validate whether the asset is in proper working order and any maintenance required for the asset is recorded using the **Maintain Ongoing Events** screen (see the events chapter of the Sunflower Enterprise Administration Guide). If the asset passes inspection, then the owning organization decides whether the asset can be reused internally (to its organization); if so, a transfer is initiated. If the asset does not pass inspection, or does pass inspection but is no longer needed, then the asset is submitted for external screening.

External Screening (“Government” organizations)

Externally, reportable and non-reportable assets are submitted to the General Services Administration (GSA) for up to 21 days unless an agency claims the asset before the end of the 21-day period. Once the screening period is over, the assets are taken out of GSA Excess and submitted for donation for a period of 5 days. If the assets are not donated, then GSA makes the assets available to the public for sale for a period of 21 days. Any proceeds of sold assets are documents and forwarded to the owning organization who then retires the asset with the appropriate final event type.

Sunflower Assets initiates the screening process by **batching** excess assets for review.

BATCH ASSETS FOR SCREENING

To use screening cycles that manage the disposal of excess assets, perform the following:

- Define Excess Review Requirements
- Define Excess Review Rules
- Batch Excess Assets

BATCH EXCESS ASSETS

After creating excess assets, the excess assets should be batched together. Batching does a number of things. It assigns a start time clock to each asset in the batch. Batching enables excess centers to move assets through the excess process with discrete time boundaries such as days or weeks. The batching process gives the excess staff control over the clock that moves the assets through their process. It will also automatically assign each asset to an Excess Review Category, based on the rules that have been defined.

Batching starts the excess asset screening process. The batching process evaluates excess assets according to review criteria; and then assigns a batch number, report number, and line number. Use the **Batch Excess Assets** screen to begin screening and group excess assets for tracking through the screening process. The batch number can be a combination of codes such as the Fiscal Year, the Julian date, and a number combination. Only excess assets that meet the rules defined with the **Maintain Excess Review Rules** screen are subject to screening.

NAVIGATION

- Click Excess
- Click Batch Excess Assets

The screenshot shows a window titled "Batch Excess Assets - asex2070". Inside the window, there is a form titled "Excess Batch". The form contains three input fields: "Identifier" with the value "RB08222012", "Batch Date" with the value "08/22/2012", and "Excess Asset Count" with the value "8". Below these fields is a checkbox labeled "Add assets to existing batch" which is currently unchecked.

Step 1. Navigate to the **Batch Excess Assets** screen.

Step 2. Enter a batch identifier in the Identifier field and click the Tab key. (e.g. Fiscal Year + Julian Date + Sequence Number)

Step 3. Batch Date displays the date the batch was created.

Step 4. Click the **Save** icon to batch all assets that have not been batched to-date.

NOTE: View the **Excess Asset Count** field to see how many excess assets were batched for screening.

NOTE: Optionally use the **Excess Asset (Global Information)** report to view those assets that have completed the necessary screening cycles and are ready for disposal.

ADD EXCESS ASSETS TO AN EXISTING BATCH

Excess assets can be added to an existing batch instead of creating a new batch.

NAVIGATION

- Click Excess
- Click Batch Excess Assets

The screenshot shows a web browser window titled "Batch Excess Assets - asex2070". The main content area is titled "Excess Batch" and contains three input fields: "Identifier" with the value "RB08222012", "Batch Date" with the value "08/22/2012", and "Excess Asset Count" with the value "8". Below these fields is a checkbox labeled "Add assets to existing batch" which is checked.

Step 1. Navigate to the **Batch Excess Assets** screen.

Step 2. With the cursor in the **Identifier** field, click the **List** icon and select the desired batch from the LOV.

Step 3. Check the **Add assets to existing batch** checkbox to add any new assets meeting the screening criteria to the existing batch.

Step 4. Click the **Save** icon to add any new assets that have not been batched to-date to the existing batch.

NOTE: View the **Excess Asset Count** field to see how many additional excess assets were batched for screening.

MANAGE EXCESS ASSET RESERVATIONS

The screening process may consist of: posting the list of excess assets to an internal website; emailing the information to a distribution list; or requesting that users generate reports (e.g. **Excess Asset (Global Information)** report) to view the list of available assets. During the internal screening process, if an organization would like one of the posted excess assets, then the requesting department will make a request to the department handling excess assets to make the appropriate arrangements. This request is known as an **Excess Asset Reservation**.

NAVIGATION

- Click Excess
- Click Create Excess Asset Reservation

The screenshot shows a web application window titled "Create Excess Asset Reservation - asex2020". The interface is divided into two main sections:

- Asset Reservations:** This section contains several input fields:
 - Date:** 09/12/2012 15:40:38
 - Reserved by:** ONE.ADM.ADM01
 - Organization:** (Redacted with a yellow bar)
 - Phone:** (Redacted with a yellow bar)
 - Duration:** (Redacted with a yellow bar)
- Assets:** This section contains a table with the following columns: "Ok", "Identifier", "Manufacturer", "Model", "Official Name", and "Number of Reservations". The first row is highlighted in light blue and has a checked checkbox in the "Ok" column. There are 10 rows in total, each with a search icon in the "Number of Reservations" column.

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

Step 1. Navigate to the **Create Excess Asset Reservations** screen.

Step 2. The following fields populate with:

- Current date and time, **Date**
- Userid based upon user login, **Reserved by**
- User phone number, **Phone**
- User asset center, **Organization**

Step 3. Enter the amount of time (days) for the reservation life span.

Step 4. Enter an **Identifier** for the excess asset and click the **Tab** key.



NOTE: The **Manufacturer**, **Model**, and **Official Name** populate.

[Step 5](#). Click the **Save** icon.

RETIRE EXCESS ASSETS

Assets can be disposed of one at a time or together in lots. The lotting process requires two steps which includes the creation of a lot master to which one can add one or more lots of assets. The following section discusses how to perform the final phases of disposal and retire those assets by using each of the methods mentioned here.

Once an asset has been removed from service by sale, auction, donation, transfer, or other means, the asset is retired. Assets may be retired individually or in groups (lots). Key attributes such as the **Date** on which the asset was removed from service and **Retirement Type**, referred to as the **Event Type**, are required. If the asset is retired from the accountable organization and is transferred to another organization, one can specify the receiving organization, contact name, and phone number for the new person responsible for the asset.

The following section illustrates how to retire individual assets or assets that are part of a lot that require retirement.

- Create Lot Masters
- Add Lots to Lot Masters
- Record an Excess Lot Final Event
- Create an Excess Asset Final Event
- Redeploy an Excess Asset into Service
- Reverse Excess Asset Final Events
- Reinstate Retired Excess Assets

CREATE LOT MASTERS

While one can retire assets one at a time, they can also dispose of assets in groups, called lots. One or more lots are disposed of in **Lot Masters**. Lotting is particularly useful when one has assets that are being disposed of in bulk. For example, one can group all donated assets for retirement on a monthly basis. The first step is to create the lot master which defines the type (e.g. sale, auction, donation etc.) and valid dates for the organization responsible for the lot master and, secondly create a lot (or lots) to add to the lot master. After creating a lot, assets should be added to that lot. Use the **Maintain Excess Lot Masters** screen to create or update one or more lot masters for auctions, sales, donations, scrap, etc.

NAVIGATION

- Click Excess
- Click Maintain Excess Lot Masters

Type	Lot Master Identifier	Begin Date	End Date	Organization	User Fields*
AUCTION	JAD04	09/12/2012	09/29/2012	ASSET CENTER 02	

Step 1. Navigate to the **Maintain Excess Lot Masters** screen.

Step 2. Enter the long name for the lot master type or select from the LOV in the **Type** field.

- If one does not find the Lot Master Type that they are looking for from the LOV in the Type field, use the Administration module Maintain Domains screen to create the Lot Master Type.
- Select the Lot Master Type simple domain and insert a row for the desired Lot Master Type. For more information about creating simple domains, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.

Step 3. Enter an identifier for the lot master in the **Lot Master Identifier**.

Step 4. Enter first date that the lot master is valid for use in the **Begin Date** field.

Step 5. Enter last date that the lot master is valid for use in the **End Date** field.

Step 6. Enter the name of the organization who is sponsoring the auction in the **Organization** field.

Step 7. Click the **Save** icon to save the new **Lot Master**.

ADD LOTS TO LOT MASTERS

After creating a lot master, one can create lots for excess assets. Each lot is associated to a lot master. Once an asset is tied to a lot, the asset location is automatically updated for the lot's location.

NAVIGATION

- Click Excess
- Click Maintain Excess Lots

Excess Lots

Lot Master Type: AUCTION Lot Master Identifier: CRP2

Lot Identifier: JAD04 Final Event: _____

Location*: _____

User Fields*: _____

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

Message: _____

Step 1. Navigate to the **Maintain Excess Lots** screen.

Step 2. Enter the identifier for the lot master in the **Lot Master Identifier** and click the Tab key. The **Lot Master Type** field auto-populates.

Step 3. Enter a lot identifier for the lot in the **Lot Identifier** field. Use an identifier to describe the type of assets that are in the lot, (e.g. computers, trucks, desks, etc.).

Step 4. Select the **Location** of the lot (assets).

Step 5. Enter the **Identifier** for the excess assets.

Step 6. Click the **Save** icon to save the new lot.

RECORD AN EXCESS LOT FINAL EVENT

When a lot is disposed of, record a final event for the lot which, in turn, automatically creates a final event for each excess asset that is a part of the specified lot. For example, if a third party sold a lot of assets for the organization through an auction and they provide a receipt of sale, record the sale using the **Create Excess Lot Final Events** screen.

NAVIGATION

- Click Excess
- Click Create Excess Lot Final Events

The screenshot shows a software window titled "Create Excess Lot Final Events - asex2100". The window is divided into two main sections. The top section, "Final Events", contains a "Date" field with the value "09/12/2012", a "Final Event" dropdown menu set to "EXCESS REDEPLOY", and two empty text input fields labeled "User Fields*" and "Document*". The bottom section, "Excess Lots", contains a table with four columns: "Ok", "Lot Master Type", "Lot Master Identifier", and "Lot Identifier". The first row of the table is highlighted in light blue. Below the table is a "Message" text input field.

- Step 1. Navigate to the **Create Excess Lot Final Events** screen.
- Step 2. Specify the date of sale (or other disposition) in the **Date** field.
- Step 3. Select the appropriate **Final Event** type.
- Step 4. Double-click in the **User Fields*** and enter any required values based on the Final Event type selected. Click **Save** to close this window.
- Step 5. Double-click in the **Document*** field to open the Maintain Documents screen.
- Step 6. Enter the related asset final event document information.
- Step 7. Click **Save** to close this window.

- Step 8. In the **Lot Master Identifier** field, select the appropriate value from the LOV. The **Lot Master Type** should populate automatically.
- Step 9. Select the appropriate **Lot Identifier** from the LOV.
- Step 10. Click the **Save** icon to save the lot final event record.

CREATE EXCESS ASSET FINAL EVENT

When retiring individual assets (that have not been disposed of through a lot), use the **Create Excess Asset Final Events** screen to specify the final disposition of the assets.

Scenario: The following graphic illustrates how to retire asset **EXX02**, transferred today to the Department of Transportation, per the details of transfer document **55**.

NAVIGATION

- Click Excess
- Click Create Excess Asset Final Events

Ok	Identifier	Manufacturer / Model / Official Name*
<input checked="" type="checkbox"/>	EXX02	HEWLETT-PACKARD_9000_COMPUTER MINI_X0
<input type="checkbox"/>		

- Step 1.** Navigate to the **Create Excess Asset Final Events** screen and enter the data provided by the table shown above.
- 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 **Final Event** field for the excess asset.
- Step 4.** Double-click in the **User Fields** to enter additional information about the retirement. Save to close this window.
- Step 5.** Double-click in the **Document field**, to open the **Maintain Documents** screen and enter the related asset final event document information. Save to close this window.
- Step 6.** Enter the identifier of the excess asset and click the Tab key. The **Manufacturer, Model, and Official Name** populate.



[Step 7](#). Click the **Save** icon to save the asset final event record.

REDEPLOY AN EXCESS ASSET INTO SERVICE

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

NAVIGATION

- Click Excess
- Click Create Excess Asset Final Events

Final Events

Date: 12/07/2012

Final Event: EXCESS REDEPLOY

User Fields*: ASSET CENTER 01 __ANDERSON JOE 44A409 __INDIANAPOLIS __BUILDING __123 COLTS CIRCLE

Document*

Comment

Assets

Ok	Identifier	Manufacturer / Model / Official Name*
<input checked="" type="checkbox"/>	RBINV03	TOSHIBA __T3100 __TELEVISION
<input type="checkbox"/>		

Message: Complete

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

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

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

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

NOTE: If the asset previously had another Interest, such as Inventory, once saved this will generate a Change Steward, 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 excess 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 Steward, Change Location and Change Custodian.

NAVIGATION

- Click Excess
- Click Excess Asset Summary and History

The screenshot shows the 'Excess Asset Summary and History' application window. At the top, the 'Assets' section contains fields for Identifier (RBINV03), Identifier Type, Parents (0), Children (0), C/A/P (C), and Current Identifier (RBINV03). Below this is the 'Timeline' tab, which includes a 'Details' sub-tab. The 'Timeline' section has several checkboxes for filtering events: 'Include Events', 'Include Resolutions', 'Include Contract Reports', 'Include Meter Readings', 'Include Open Requests', 'Include Closed Requests', 'Include IUID/WAWF', and 'Include Configuration and Kitting'. A 'Sort By' dropdown menu is set to 'DATETIME DESC'. The main area displays a table of events with columns for Datetime, Category, Description, Attributes, and Document?.

Datetime	Category	Description	Attributes	Document?
12/07/2012 01:01:42	OPEN REQUEST	CHANGE CUSTODIAN	ANDERSON JOE 44A409	
12/07/2012 01:01:42	OPEN REQUEST	CHANGE LOCATION	INDIANAPOLIS__BUILDING__123 COLTS CIRCLE	
12/07/2012 01:01:42	OPEN REQUEST	CHANGE STEWARD	ASSET CENTER 01	
12/07/2012 00:58:51	FINAL EVENT	(EXC RBINV03) EXCESS REDEPLOY	ASSET CENTER 01__ANDERSON JOE 44A409__INC	
11/12/2012 15:49:45	INITIAL EVENT	(EXC RBINV03) RECEIVE EXCESS ASSET		
11/12/2012 12:51:32	ONGOING EVENT	BARCODE READER TRANSACTION	50000005784_50000005790_50000005786__BCR-1:	
11/12/2012 12:51:32	ONGOING EVENT	CHANGE LOCATION	AUSTIN, TX	
11/12/2012 12:51:31	ONGOING EVENT	INTO EXCESS		
11/11/2012 13:29:36	RESOLUTION	INACTIVE SEND TO EXCESS	CLERK2 INVENTORY INV02	
11/11/2012 13:29:36	CLOSED REQUEST	EXCESS RECEIVAL	23_Y_USED - GOOD__Color is funny	

REVERSE AN EXCESS ASSET FINAL EVENT

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

NAVIGATION

- Click Excess
- Click Create Excess Asset Final Events

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

Final Events Section:

- Date: 08/27/2012
- Final Event: EXCESS TRANSFER
- User Fields*: ACME PREFAB
- Document*: (empty)
- Comment: (empty)

Assets Section:

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

Message: (empty)

Step 1. Navigate to the **Create Excess 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 Excess
- Click Excess Asset Summary and History

Assets Identifier: 0455 Identifier Type: Parents: 0 Children: 0 C/A/P: Current Identifier: 0455

Unique Name: Default Location*: View Map

Timeline Details

UII: None Captured

Other Identifiers: EXC / 0455

Sort By: 1 DATETIME DESC, 2 DATETIME DESC, 3 DATETIME DESC

Get Records

Datetime	Category	Description	Attributes	Document?
12/07/2012 01:29:43	ONGOING EVENT	REMOVED FINAL EVENT	08/27/2012 09:52:30_EXCESS TRANSFER_EXCES	
09/12/2012 15:56:55	RESOLUTION	ONLINE DECLARATIVE	MANAGER GEN REVIEW 1 SR REV MGR	
08/22/2012 16:57:26	ONGOING EVENT	CHANGE CUSTODIAN		
08/22/2012 16:57:25	ONGOING EVENT	INTO EXCESS		
08/22/2012 16:57:25	INITIAL EVENT	(EXC 0455) RECEIVE EXCESS ASSET		
12/09/2000 11:59:50	ONGOING EVENT	ADDED TO AGREEMENT	1999-02-01 LEASE_SUBJECT TO AGREEMENT	
12/09/2000 11:59:50	INITIAL EVENT	(AGR 0255) SUBJECT TO AGREEMENT		
12/09/2000 11:24:03	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST_6500_0	
12/09/2000 11:24:03	INITIAL EVENT	(INV 0255) PURCHASE		

Timeline Report Record Properties

REINSTATE RETIRED EXCESS ASSETS

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

NAVIGATION

- Click Excess
- Click Maintain Excess 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.

EXCESS REPORTS

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

There are several output options available for the reports.

- PDF (Adobe Acrobat)
- HTML
- Text

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

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

Excess Assets (Global Information) Report

The **Excess Assets (Global Information) Report** is a catch-all report that shows detail and summary information of excess assets based on a variety of optional parameters.

Asset Reservations Report

The **Asset Reservations Report** shows the details of excess assets with outstanding reservations.

Asset Search Report

The **Asset Search Report** searches the asset repository for assets matching a description, manufacturer or model; used for asset review. Allows the user to search across all interest types.

Asset Structure Report

The **Asset Structure Report** shows parent/child relationships between assets. Allows the user to search across all interest types.

Asset Structure by Configured Totals Report

The **Asset Structure by Configured Totals Report** shows parent/child relationships through configuration totals. Allows the user to search across all interest types.

Assets with Pending Excess/Inactive Requests Report

The **Assets with Pending Excess/Inactive Requests Report** lists assets with pending inactive/excess requests. Allows the user to search across all interest types.

Excess Asset Summary by Asset Flag Report

The **Excess Asset Summary by Asset Flag Report** summarizes excess asset value and count by asset flag. Search parameter is by date range.

Excess Asset Final Events Report

The **Excess Asset Final Events Report** shows assets based on the type, date and details of their final events.

Excess Asset Activity Summary by Asset Type Report

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

Excess Asset Initial Events Report

The **Excess Asset Initial Events Report** shows assets based on the type, date and details of their excess initial events.

Excess Asset Ongoing Events Report

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

Excess Asset Activity Summary by Asset Flag Report

The **Excess Asset Activity Summary by Asset Flag Report** shows the details of excess asset activity grouped by asset flag.

Excess Asset Summary by Asset Type Report

The **Excess Asset Summary by Asset Type Report** summarizes excess asset value and count by asset type.

Excess Asset Timeline Report

The **Excess Asset Timeline Report** displays the event timeline of excess assets over a time period, similar to the Excess Asset Summary and History screen.

Excess Assets Report

The **Excess Assets Report** shows the details of excess (disposal) assets.

Excess Interface Processing Results Report

The **Excess Interface Processing Results Report** shows the results of processing the contents of interface table as_load_excess_assets.

Excess Review Categories Report

The **Excess Review Categories Report** shows groups of excess assets within a certain Review Category.

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.

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.