



## MANAGE PHYSICAL INVENTORY

**C**onducting a physical inventory is a key task in any organization; therefore the setup and the execution of the campaign should be carefully planned. With any physical inventory it is important that organizations not only be able to account for the assets in their possession, but to ensure the asset records are accurate and up-to-date. Sunflower's Review module allows for both accounting for and updating asset records, and to tailor the physical inventory process to fit an organization's inventory plan, no matter how long the inventory (review) campaign lasts or how many or which type of assets must be found. This chapter discusses how to set up, perform, and closeout review campaigns, and provides several considerations to help determine how to set up and manage review campaigns.

### KEY CONCEPTS

This chapter includes the following discussion points and concepts:

- About The Review Module
- Considerations in Using the Review Module
- Set Up Review Campaigns
- Execute Review Campaigns
- Review Reports
- The Barcode Module

## ABOUT THE REVIEW MODULE

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Sunflower enables users to manage and perform concurrent physical inventories. The physical inventory process begins by creating a review campaign. The review campaign defines the parameters within which the physical inventory can be conducted. One of the first steps to conducting a review campaign is to define the baseline of the physical inventory. The baseline specifies the base level of assets that are to be accounted for within a review campaign. After defining the baseline criteria, freeze the baseline to establish the base of assets for review. In addition, define the methods (e.g. MobileTrak barcode scanning, manual entry etc.) that will be used to locate and validate the assets that are found during the physical inventory process.

The Review (physical inventory) module enables recording, tracking, and modifying information about the assets within the organization that are a part of the general inventory. Some or all of the functionality provided within the Review module is available to users who have been assigned to one of the roles used to manage inventory (e.g. Review Manager or Review Clerk). This chapter discusses the many functions that can be accomplished by using the Review module.

The primary benefit of Sunflower's Review module is its flexibility. The module allows users to:

- Create single or multiple review campaigns
- Define the assets that should be found within each campaign
- Define the types of "finds" (Resolutions) that will be accepted for each campaign
- Define the people that will be allowed to "find" the assets for each campaign
- Log Resolutions to note whether an asset has been found or not found
- Run reports to track the progress of each review campaign

The goal at the end of each review campaign should be to have 100% of a campaign's assets with associated Resolutions; meaning that each asset should have a Resolution noting that the user has either conclusively found that asset or has looked and did not find that asset. **In either scenario, (found or not found), Sunflower maintains a record of the associated Resolutions for each asset**, allowing users to track the progress and the success rate of each review campaign.

## CONSIDERATIONS IN USING THE REVIEW MODULE

Before starting a review campaign a number of considerations should be taken into account to ensure the campaign meets the organization's stated goals. To help in deciding how to set up campaigns, review the following questions and answers:

### **Why are you conducting the campaign?**

This is a key question that should be asked before beginning any review campaign. For many organizations the answer is simple: "The law says we have to do an annual wall-to-wall campaign, so we have to go out and find everything." But there may be other reasons to conduct a campaign: maybe you're involved in a building move so you want to run a campaign and account for only the assets that are being moved. Or perhaps your organization has been losing laptops at an unacceptable rate so you decide to conduct a review campaign just on laptops. No matter the answer, Sunflower's Review module allows you set up multiple review campaigns based on your needs; and the campaigns can be run concurrently or consecutively depending on your needs.

### **When is it happening?**

Any review campaign's time frame should be limited so users understand how long they have to find assets and update the asset records. The Review module allows you to set specific time frames for each campaign so that the scope of the campaign is closely managed. We'll learn more about how to set up and define time frames for campaigns in the **Create Review Campaigns** section below.

### **What are you looking for?**

As decided by the purpose of the campaign(s) the Review module allows you to specifically choose the baseline (or base) of assets you include in a review campaign. For wall-to-wall campaigns the base would include every asset in your organization. But in our building move example the base would include only the assets in one building that are moving to the next. And in our laptop example the base would include only assets where the Official Name is "Laptop". We'll learn more about how to define your asset base in the **Create Base Assets** section below.

Along with the capability to choose which assets you include in the base, you can freeze the base assets in each review campaign to prevent the scope of the campaign from spiraling out of control. For example, if at the beginning of the campaign your base is 1,000 assets, that is the number of assets you will need to find: no more, no less. This allows you to keep close tabs on the progress of the campaign without the target number of assets constantly shifting. We'll learn more about how to freeze your asset base in the **Freeze Base Assets** section below.

### How are you finding your assets?

Different methods of “finding” assets should be considered when conducting a review campaign. The Review module allows you to define these methods for each of your campaigns through the set up of **Resolutions**. For example, you may allow your inventory staff to confirm the existence of a laptop in your laptop campaign through visual verification, allowing them to log **Online Physical** Resolutions (i.e., “I have seen the asset and can verify its existence.”) But if you are running a campaign on sensitive nuclear or biological materials, you may only accept a **Barcode Scan** Resolution, to ensure that the asset was, in fact, found.

Sunflower also supports “inventory by exception” Resolutions, where day-to-day events such as location changes or maintenance activities are taken under consideration. In these examples, any time an asset's location is changed or a maintenance activity is logged Sunflower will count these as valid Resolutions for a given review campaign. In this way inventory staff won't then have to physically log an inventory “find” since the location change or maintenance events each counted as “finds” in and of themselves.

Finally, while we've discussed “positive” Resolutions that show assets were found, Sunflower also allows you to log “negative” Resolutions, which allows users to indicate an asset was looked for but not found as part of a review campaign. We'll learn more about how to set up valid resolutions in the Define Valid Resolution Types section below.

### Who is finding your assets?

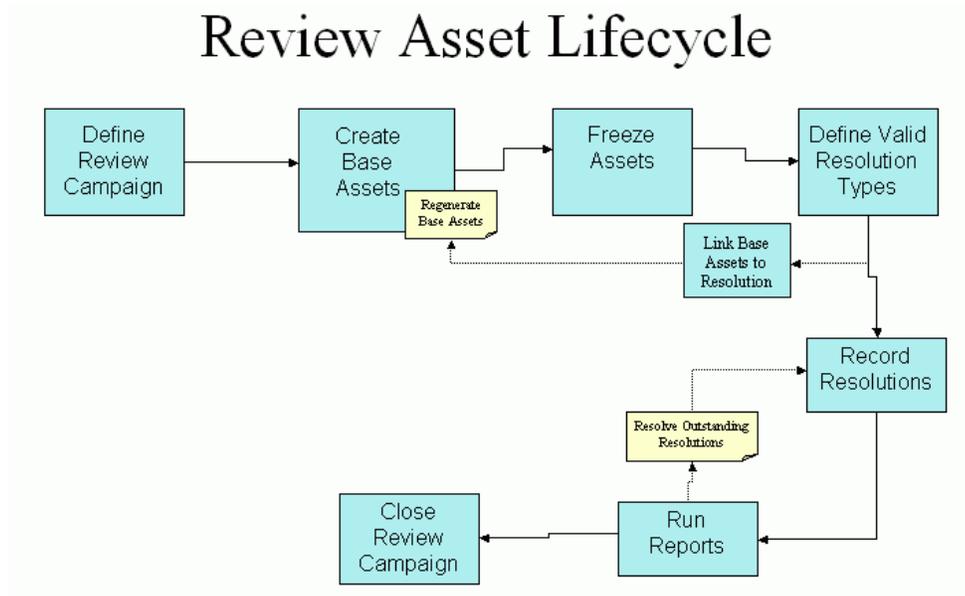
In some cases you may want to limit the types of people who can “find” certain assets. For example, with nuclear or biological materials you may only want the Property Manager finding these sensitive assets; whereas with laptops you may have an inventory contractor, a user of the laptop, or a summer intern log Barcode Scan Resolutions for these assets. Sunflower provides the capability to limit who can log which Resolutions so that security concerns are taken fully into account. We'll learn more about how to define the valid users in the **Define Valid Resolution Types** section below.

Let's now have a look at the process of setting up and conducting a review campaign.

## REVIEW CAMPAIGN LIFECYCLE

The review campaign lifecycle starts with the setup of the campaign and ends with closing the campaign. In between users will search for assets, log resolutions, run reports to track progress of the campaign, and continue to search for assets. The review process consists of the following stages:

1. Define the review campaign
2. Create and freeze the assets in the base of the campaign
3. Define the criteria for valid asset finds (resolutions)
4. Link the base assets with the valid resolutions
5. Record resolutions
6. Run reports to track progress of the campaign
7. Close the review campaign



## REVIEW ROLES AND MENU ACCESS

There are two roles associated with the Review Module: **Review Manager** and **Review Clerk**. The main difference between the two roles is that Review Managers can set up and execute review campaigns, while Review Clerks are limited to executing the campaigns only. See the table below for a more detailed listing of the screens each role can access.

MENU ITEM	ROLE	
	REVIEW MANAGER	REVIEW CLERK
<b>Maintain Review Campaigns</b>	Yes	--
<b>Maintain Base Frozen Statuses</b>	Yes	--
<b>Maintain Valid Resolution Types</b>	Yes	--
<b>Maintain Review Base</b>	Yes	--
<b>Relink Base Assets with Resolutions</b>	Yes	--
<b>Edit Resolution Interface Records</b>	Yes	Yes
<b>Process Resolution Interface Records</b>	Yes	Yes
<b>Lookup Resolutions</b>	Yes	Yes
<b>Create Resolutions</b>	Yes	Yes
<b>Delete Resolutions</b>	Yes	Yes
<b>Maintain Review Accruals</b>	Yes	Yes
<b>Review Reports</b>	Yes	Yes

## REVIEW MANAGER VS. REVIEW CLERK

What is the difference between the manager and clerk roles? One can tell from the table above that there is a significant difference in the type of access provided for these roles within the Review module. The difference between the two roles is related to their functions as well as organizational structure. The Review Manager has access to and can edit (create, manage and close) the physical inventory process throughout an organization. On the other hand, the Review Clerk does not have creation capabilities and can only perform tasks related to the physical inventory process. Additionally, the Review Clerk can only perform management functions related to physical inventory for those departments to which the clerk has been assigned. The Sunflower Administrator must specify at what level within the organization a Review Clerk can work with the organization's assets by defining them as an Organization Contact. For more information about Organization Contacts, see the Roles chapter of the Sunflower Enterprise User Guide.

### REVIEW MANAGER

The Review Manager has the ability to manage (e.g. create, modify, retire) all review campaigns within Sunflower. Additionally, the Review Manager is responsible for general administration tasks such as the definition and maintenance of list of values that support the Review module. Some of the tasks the Review Manager role can perform are as follows:

- Create Review Campaigns
- Define Valid Resolutions
- Define the Review Base

### REVIEW CLERK

The Review Clerk does not have creation capabilities and can only perform tasks related to management of the physical inventory process. Additionally, the Review Clerk can only perform functions for those departments to which the clerk has been assigned as an Asset Center Representative (ACR). Some of the tasks the Review Clerk role can perform are as follows:

- Create Resolutions
- Lookup Resolutions
- Maintain Review Accruals

## SETUP REVIEW CAMPAIGNS

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As noted above, a Review Manager sets up the review campaign(s). This should be done once the inventory plan is in place, and before the inventory staff begins looking for assets. The steps outlined in this section include:

1. Create Review Campaigns
2. Create Base Assets
3. Freeze Base Assets
4. Define Valid Resolution Types
5. Link Base Assets to Existing Resolutions
6. Close Review Campaign

This section discusses how to:

- Create Review Campaigns
- Create Base Assets
- Freeze Base Assets
- Link Base Assets to Existing Resolutions
- Execute Review Campaigns
- Review (Physical Inventory) Reports

## CREATE REVIEW CAMPAIGNS

The first step in the physical inventory process is to set up the review campaign by giving it a name, (e.g., “Organization XX 2011 Annual Campaign”), identifying the sponsor of the campaign, (the group that cares about it), identifying which type of assets will be inventoried, (Inventory, Excess, etc.), identifying the base source, (i.e., determining how to identify which assets that will be included in the campaign), and outlining the dates of the campaign.

Scenario: Use the **Maintain Review Campaigns** screen to create a review campaign.

### NAVIGATION

- Click Review
- Click Maintain Review Campaigns

The screenshot shows a web application window titled "Maintain Review Campaigns - asrv2010". The main content area is titled "Review Campaigns" and contains a form with the following fields and values:

- Name: REVIEW CAMPAIGN 2
- Sponsor: ASSET CENTER XX
- Campaign Type: INVENTORY
- Sample Type: POPULATION
- Base Source: RULE GENERATED
- Audit of: (empty)
- Culminated by: (empty)
- Begin Date: 07/01/1998
- Expected End Date: (empty)
- Actual End Date: (empty)
- User Fields\*: (empty)

At the bottom of the form, there are three buttons: "Comment", "Freeze Status", and "Resolutions". A "Frozen?" checkbox is checked with a "Y" value.

**Step 1.** Navigate to the **Maintain Review Campaigns** screen.

**Step 2.** Enter the name of the review campaign in the **Name** field.

NOTE: This name should be distinct.

**Step 3.** Select the name of the organization that is administering the campaign in the **Sponsor** field.

**Step 4.** Select the type of review campaign that will be performed in the **Campaign Type** field.

- The **Campaign Type** is the asset interest type for the campaign one plans to perform (e.g. Inventory, Inactive etc.)

- Define Campaign Types with the Administration module's **Maintain Domains** screen. This is an activity that a Review Manager or Sunflower System Administrator role can perform.

**Step 5.** Select the sample type that should be used to create the base (e.g. **Population**) in the **Sample Type** field.

- The **Sample Type** determines how to create the base. For example, a **Population** sample type includes all assets in baseline.
- Use **Random Sample** to select a subset of the assets in the baseline.
- If the sample type is a **Random Sample**, then a pop-up window displays allowing one to specify the sample size and the number of assets to include in the sample.
- Define sample types with the Administration module's **Maintain Domains** screen.

**Step 6.** Select the base source method in the **Base Source** field.

- The **Base Source** establishes the method that will be used when considering assets for a review campaign. The selected method creates the list of assets that should be audited.
- **Rule Generated Rule Generated Base Source** types are a set of predefined rules to determine which assets are the subject of the review.
- **Campaign** - used to audit another campaign
- **Direct File Load** - load a list of assets created from an external program
- **User Created SQL** – if the rules do not meet the available choices, create custom SQL based rules.

**Step 7.** Enter the name of the previous review campaign in the **Audit of** field if this review campaign is an audit of a previous campaign.

- Click the **List** icon for a list of review campaigns.
- Select the name of a prior review campaign for which is being audited. This is an optional field.

**Step 8.** Use the **Culminated by** field to specify whether the campaign definition that is being created is validated against a prior campaign.

- Click the **List** icon for a list of review campaigns.
- The **Culminated by** field refers to the population campaign that will be used to validate this campaign. Use this field with a sample type of a **Random Sample**.

**Step 9.** Enter the date that the review campaign begins in the **Begin Date** field.

- Double-click in the field to display the calendar pop up screen.

**Step 10.** Enter the date that the review campaign is expected to end in the **Expected End Date** field.

- Double-click in the field to display to display the calendar pop up screen. This is an optional field.

**Step 11.** Enter the date the review campaign actually ends in the **Actual End Date** field.

- Double-click in the field to display the calendar pop up screen. When this date is entered, any resolutions logged after this date will not count for that campaign.
- Leave this field blank until the review cycle has been completed.

**Step 12.** The **Frozen?** field automatically populates when the review campaign is frozen.

**Step 13.** Enter user-defined values (if applicable) in the **User Fields** field. Double-click to edit this field.

**Step 14.** Click the **Save** icon.

**Step 15.** Define the acceptable resolutions for the review campaign by clicking the **Resolutions** button to display the **Maintain Valid Resolution Types** screen.

Enter the valid resolution types if applicable, then click the **Save** icon to return to the **Maintain Review Campaigns** screen.

**Step 16.** Click the **Comment** button at the bottom of the screen to display the **Capture Comments, Pictures, and Attachments** screen if a comment should be entered for a review campaign.

- Add comments, pictures or attachments as needed.
- Click the **Save** icon to return to the **Maintain Review Campaigns** screen.

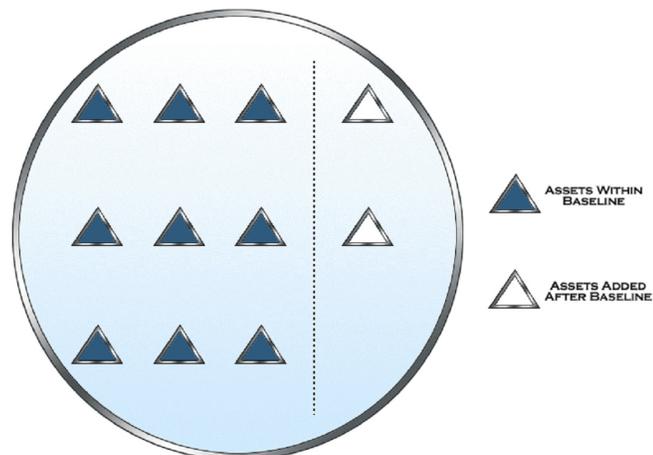
**Step 17.** Click the **Save** icon to save the review campaign.

## CREATE BASE ASSETS

After defining the campaign, the base should be defined. The base (baseline) determines all of the organization's assets to be included in the campaign, or a subset of the assets such as laptops or nuclear materials.

All existing assets contained in the Sunflower database as of the creation of the base can be subject to a review campaign. Assets that are added to Sunflower **after** the base is created would not be part of an existing base (or review campaign). Again, this prevents any scope creep in the number of assets that are required to be found, and therefore provides a solid target to shoot for to complete the review campaign.

Once a base is created for a review campaign, only assets that are part of the base will be linked to the review campaign. In the illustration below, assets represented on the left of the dotted line (turquoise triangles) are part of the base, and those to the right of the dotted line (in white) are not. As the inventory staff begins logging Resolutions (“finds”) for any base assets, those assets would show as being “found” **as part of that review campaign**. If staff find any of the assets that are **not** part of the base, these would be shown in Sunflower as “found”, but would **not** be shown as “found” **as part of that review campaign**. In other words, Sunflower will let users acknowledge that an asset was “found” whether it is part of a review campaign base or not, but if an asset is not part of the base it would not be linked to that review campaign.



## CREATION METHODS

There are a number of sources a Review Manager can use to create a base - these are called the Base Source rules. These are used to define how the base is created, but not necessarily which assets will be part of the base (that will be done later). The valid Base Sources are:

- **Rule Based** - use when the assets that one wants to include in the base can be selected using Sunflower attributes (e.g., Stewards, Asset Value, Official Name, etc.).
- **Campaign** - use when one wants to audit the results of a previous review campaign.
- **Direct File Load** - use when one wants to load base assets from an external program.
- **User Create SQL** - use when the review base requirements are so complex that one must define the base using their own query statement.

More detailed explanations of each Base Source are found on the following pages.

**RULE BASED**

Use a **Rule Based** base source when the assets that should be included in the base can be selected using Sunflower attributes (see table below for examples). One or more rules can be selected to further narrow the base of assets. For example, one may want to find only vehicles of a certain Steward that are over \$25,000. The attributes one would select would be:

- OFFICIAL NAME = VEHICLES
- STEWARD = ASSET CENTER XX
- ASSET VALUE > \$25,000

In this example these rules use an **AND** condition - meaning for an asset to be included in the base of that campaign it must have an Official Name of Vehicle **AND** a Steward of Asset Center XX **AND** an Asset Value greater than \$25,000; the more **AND** conditions used the more narrow the base becomes.

Sunflower will also accommodate **OR** conditions, where, using the above example again, one could include assets in the base that have Official Name of Vehicle **OR** are in Steward Asset Center XX **OR** have an Asset Value greater than \$25,000. In this case, the base would include any assets that meet either of those conditions - so we would see all Vehicles, all assets in Steward Asset Center XX, and all assets over \$25,000, so the base would be much larger than if the **AND** condition were used.

RULE BASED ATTRIBUTES FOR CREATING AN ASSET BASE	
ACQUISITION DATE	INACTIVE ASSET START DATE
ACTIVITY STATUS	INACTIVE TYPE
ACTIVITY TYPE	INTEREST ASSET TYPE
AGREEMENT	INVENTORY ASSET START DATE
AGREEMENT ASSET START DATE	LEVEL 1 STRUCTURE
AGREEMENT TYPE	LEVEL 2 STRUCTURE
ASSET SUB TYPE	MANAGER
ASSET TYPE	MANUFACTURER
ASSET VALUE	MODEL
CONDITION	OFF SITE LOCATION TYPE
CUSTODIAN	OFFICIAL NAME
EXCESS ASSET START DATE	OWNER
FINANCIAL ASSET START DATE	SITE
FINANCIAL CARRIER	STEWARD
FLAG	SUBSET
FSC CLASS	SUBSET ASSET START DATE
FSC GROUP	SUBSET TYPE
FSC NATIONAL STOCK NUMBER	USER

## CAMPAIGN

Use the **Campaign** base source when one wants to audit the results of a previous review campaign. Sunflower can create a base by random sampling the base of a prior campaign. In other words, the **Campaign** base source creates a subset of base assets from a previous campaign's baseline. This feature can be used to verify the results of a closed campaign.

NOTE: The sample type selection to support this base source rule must be **Random Sample**.

## DIRECT FILE LOAD

Use the **Direct File Load** base source when using an external program to select the base assets for the review campaign. For example, if using a statistical sampling algorithm program to determine the review campaign's base, load the file created from this process with the **Direct File Load** base source process.

The following steps are required to use the **Direct File Load** base source type:

- Step 1. Produce a file from an external source (e.g. extract from Microsoft Excel, SASS etc.).
- Step 2. Load data from the external source into the **AS\_LOAD\_BASE\_ASSETS** table with the **Process Resolutions Interface Records** screen.

Required fields for this table load are:

- *BSAS\_INTEREST\_ENTITY\_NAME*
- *BSAS\_INTEREST\_IDENTIFIER*
- *SOURCE\_LOAD\_GROUP*
- *SOURCE\_RECORD\_GROUP*

- Step 3. Select a **Campaign** (e.g. Inventory, Agreement, Inactive, Excess, etc.).
- Step 4. Select a **Sample Type (Population)**.
- Step 5. Create the **Asset Base**.

## USER CREATED SQL

It is possible to write a custom query and have that query deliver the baseline. This is useful when the review base requirements are so complex that one must define their own query statement. To do this, Click the **Free** button of the **Base Rules** block to write the query statement as a SQL statement.

When the previous base source type rules do not create the desired criteria for selecting the review campaign asset base, create a custom SQL based rule to capture the desired results. Below is an example of a SQL derived base source rule for a review campaign that selects inactive assets with a start date of 01/01/1990 or later.

```

SELECT AS_ASSETS.ID
FROM
    AS_ASSET_STATES,
    AS_ASSETS
WHERE
    EXISTS (SELECT 'x'
            FROM AS_INACTIVE_ASSETS INAS
            WHERE INAS.ASSET_ID = AS_ASSETS.ID
            AND INAS.START_DATETIME > TO_DATE('01/01/1990', 'MM/DD/YYYY')
            AND NVL(INAS.STOP_DATETIME, SYSDATE) <= SYSDATE)
AND
    AS_ASSETS.ASSET_STATE_ID_LAST = AS_ASSET_STATES.ID

```

## SAMPLE TYPES

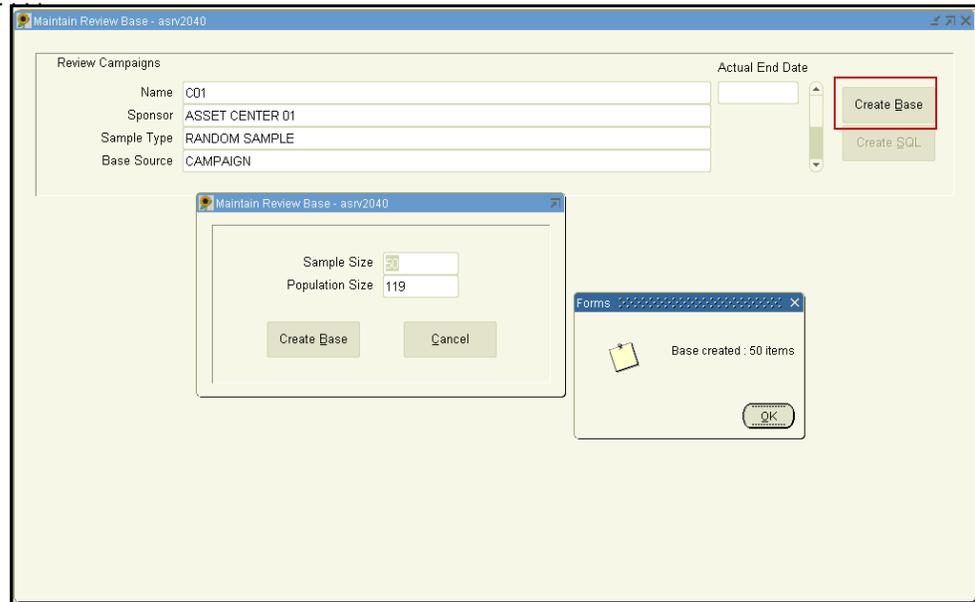
**Sample Types** are used to define whether the base assets will be chosen from the entire **Population** of assets or from a **Random Sample** of a previous review campaign. Use **Random Sample** only when the **Campaign** Base Source is selected.

### GENERATING A REVIEW BASE

Scenario: The following graphic illustrates how to use the **Maintain Review Base** screen to specify which assets to include in the baseline for the review campaign. In this example, six assets make up the asset base for the Steward organization “Asset Center XX”. In this example, the **Base Source** is **Rule Generated**, meaning the Review Manager will use out-of-the-box rules to create the base. In this case, **Base Rule Details - Criteria** (Base Rule) is **Steward = Asset Center XX**, so only that Steward's assets are part of the base.

#### NAVIGATION

- Click Review
- Click Maintain Review Base



**Step 1.** Navigate to the **Maintain Review Base** screen.

**Step 2.** Enter the desired review campaign name of the review campaign in the **Name** field and click the **Find** icon.

- The other fields in the **Review Campaign** block automatically populate upon making the selection.
- If the **Base Source** of the review campaign is **Rule Generated** or **User Created SQL**, Sunflower displays additional blocks on the screen.
- To retrieve the base information for all review campaigns, place the cursor in the **Name** field and click the **Find** icon. Use the **Previous Record** and **Next Record** icons to navigate through the records.

**Step 3.** Enter the tracking number assigned to the base rule in the **Identifier** field of the **Base Rules** block.

NOTE: If a base rule already exists for the review campaign, click the **Insert Record** icon to add a new base rule. Enter multiple identifiers as required (e.g. XXA & XXB, the asset base will be the accumulated total of both entries).

#### For Rule Generated Review Bases:

**Step 4.** Enter the type of criteria to add in the **Attribute** field of the **Base Rule Details - Criteria** block.

NOTE: Click the **Insert Record** icon to add a new base rule or click the **Criteria** button and use the **Base Rule Details - Criteria** block to select the criteria for the additional rule.

NOTE: All conditions for a single rule constitute an **AND** condition. Multiple rules (Identifiers) constitute an **OR** condition.

**Step 5.** Enter the relational operator that to be used for the expression in the **Operator** field (e.g. =, >=, etc.).

**Step 6.** Enter the value to be used for the expression in the **Operand** field.

- The value selected in the attribute field determines the list of possible operands. For example, **STEWARD = ASSET CENTER XX** means that one is creating a review campaign for all assets assigned to the **ASSET CENTER XX** steward.
- Here is another example involving the two separate steward organizations. To create an asset base for two separate steward organizations, one will need to create two sets of rules with separate identifiers. If using one identifier to create a rule attempting to capture the two organizations, the assets will need to belong to both steward organizations to be part of the asset base, which Sunflower does not allow. Therefore, two Identifiers should be used, with one Steward Organization in each.

NOTE: The **Operand** phrase should not begin with "WHERE" or "AND."

If the Sunflower attributes provided are not sufficient to define the asset base, click the **Free** button in the **Base Rules** block and enter a custom SQL phrase in the **Base Rules Details - Free Text** box.

Another option is to click the **Next Block** icon to open the same **Base Rules Details - Free Text** box. The SQL statement that is entered in the **Text** box is an addendum to the existing SQL script generated by the selected business rules. To add another condition for an attribute that is not a part of the Rule Generated attribute set, then add the desired attribute in the **Base Rules Details - Free Text** box. The additional attribute will be added to the Rule Generated SQL script to further filter the desired asset base.

For example, Agreement assets can utilize the **Alternate Id 1** attribute to track assets. Insert the condition, `ALTERNATE_IDENTIFIER_1 = 'XYZ123'`, in the **Base Rules Details - Free Text** box and click the **Create SQL** button to add the statement to the existing SQL. Click the **Next Block** icon to view the modified SQL statement in the **Base Creation Statements** block as illustrated below.

Base Rule Details - Free

Text

```
ALTERNATE_IDENTIFIER_1 = 'XYZ123'
```

Base Creation Statements

Text

```
SELECT AS_ASSETS.ID
FROM
  AS_ASSET_STATES,
  AS_ASSETS
WHERE
  ALTERNATE_IDENTIFIER_1 = 'XYZ123' AND EXISTS (
  SELECT 'x'
  FROM AS_INVENTORY_ASSETS IVAS
  WHERE IVAS.ASSET_ID = AS_ASSETS.ID
  AND IVAS.START_DATETIME > TO_DATE('01/01/1980', 'MM/DD/YYYY')
```

### For User Created SQL Review Bases:

**Step 1.** Enter the text of the SQL statement in the **Text** box field of the **Base Creation Statements** block.

NOTE: The select clause of the SQL statement entered must return only the **AS\_ASSETS.ID** column.

**Step 2.** Click the **Save** icon or the **Create SQL** button to save the SQL statement for the review base.

**Step 3.** Click the **Create Base** button.

**Step 4.** Click the **Save** icon to save the rules for the review base.

### For Direct File Load Review Bases:

If the review campaign **Base Source** is **Direct File Load** or the **Sample Type** is **Random Sample**, Sunflower displays additional windows to capture the required information.

**Step 1.** Enter the value that identifies the review campaign's asset base in the **AS\_LOAD\_BASE\_ASSETS** table in the **Source Load Group** field. Click the **List** icon for a list of source load groups.

**Step 2.** Click the **Create Base** button. Sunflower displays a dialog box with the number of base assets created.

**Step 3.** Click the **Save** icon to save the rules for the review base.

### For Random Sample Review Bases:

**Step 1.** Enter the number of assets that to include in the asset base in the **Sample Size** field.

**Step 2.** Click the **Create Base** button. Sunflower displays a dialog box with the number of base assets created.

**Step 3.** Click the **Save** icon to save the rules for the review base.

To view the SQL script that r base rule is creating, click the **Next Block** icon to cycle through to the screen to retrieve the **Base Creation Statements** block revealing the actual SQL script. This is a helpful tool for diagnostic tuning of SQL scripts before committing the script to create the asset base. Alternatively, view the SQL script that was used to create an asset base in the **AS\_BASE\_CREATION\_STATEMENTS** table in the **TEXT** column.

## FREEZE BASE ASSETS

After specifying the asset base for the review campaign, use the Maintain Base Frozen Statuses screen to freeze the asset base. Sunflower will not accept resolutions for a review campaign until its base is frozen. Freezing the base prevents the set of base assets from changing once the campaign has started (i.e., scope creep). Additionally, this feature enables one to capture auditable campaign results by tracking the number of positive and negative Resolutions against the number of base assets. NOTE: One cannot add or remove assets of a frozen asset base. However, to modify the base of assets during a campaign, one must first unfreeze the base, re-generate the base, then re-freeze the base.

Scenario: The following graphic illustrates how to use the Maintain Base Frozen Statuses screen to freeze the asset base.

### NAVIGATION

- Click Review
- Click Maintain Base Frozen Statuses

The screenshot shows the 'Maintain Base Frozen Statuses' application window. The window title is 'Maintain Base Frozen Statuses - asrv2020'. The interface is divided into two main sections: 'Review Campaigns' and 'Base Frozen Statuses'.  
 In the 'Review Campaigns' section, there are three input fields: 'Name' (containing 'REVIEW CAMPAIGN 2'), 'Sponsor' (containing 'ASSET CENTER XX'), and 'Actual End Date' (empty).  
 In the 'Base Frozen Statuses' section, there is a table with three columns: 'Datetime', 'Frozen?', and 'Comment Display (Text Only)'. The first row of the table contains the value '08/24/1998 11:05:25' in the 'Datetime' column, 'Y' in the 'Frozen?' column, and a large empty text area in the 'Comment Display (Text Only)' column. Below the table is a 'Comment' button.

**Step 1.** Navigate to the **Maintain Base Frozen Statuses** screen.

**Step 2.** Enter the desired review campaign name in the **Name** field and click the **Find** icon to retrieve and freeze or unfreeze a specific review campaign's base.

NOTE: The other fields in the **Review Campaigns** block automatically populate upon making a selection.

NOTE: To retrieve the base information for all review campaigns, place the cursor in the **Name** field and click the **Find** icon. Use the **Previous Record** and **Next Record** icons to navigate through the records.

- Step 3. Specify whether to freeze or unfreeze the base. To freeze the base, enter **Y** in the **Frozen?** field. To unfreeze the base, enter **N** in the **Frozen?** field.
- Step 4. Click the **Comment** button at the bottom of the screen to display the **Capture Comments, Pictures, and Attachments** screen if one wants to enter a comment about freezing the asset base.
- Step 5. Add comments, pictures or attach supporting documentation as needed. Click the **Save** icon to return to the **Maintain Base Frozen Statuses** screen.
- Step 6. Click the **Save** icon to freeze or unfreeze the review campaign's base.

## DEFINE VALID RESOLUTION TYPES

As noted earlier there are several different ways to capture asset “finds” - these are defined in Sunflower as resolutions. For each review campaign one must specify the types of resolutions that will be accepted for that campaign. The object of the campaign should be to log resolutions for 100% of the assets in that campaign.

While ideally most of the assets are found, there are times when assets cannot be found. Therefore Sunflower allows one to enter both positive and negative resolution types. The most conventional resolution method is to find the asset at a physical location and scan or manually key the asset's barcode using a barcode scanner.

A Declaration is another resolution method used to declare assets that are lost or cannot be found. Use a Declared Unaccounted resolution type to declare an item missing, while a Confirmed Unaccounted resolution type may be used to indicate that the asset is definitively not in one's possession.

Additionally, use the Online Physical resolution type for those assets that cannot be scanned but can be seen, thus verifying assets' location and existence. Conversely, use the Online Declarative resolution type for those assets that cannot be seen but one knows exist. (Such as a satellite or a computer at someone's home). Or in some cases, the asset may be inaccessible because it is located at an off-site location, has been loaned out, or is Contractor Acquired Property. In these situations, the only way that these assets may be accounted for is if a document is created attesting that the organization, or a contractor, has possession of the assets.

Finally, define Resolution Types that support “Inventory by Exception”. In this case everyday asset events such as maintenance activities, location and user updates, and transfers will be logged as resolutions. In this way these activities will count as valid “finds” for a review campaign, which then means one would not have to physically scan or log an online resolution for these assets since the events themselves will count as resolutions.

Use the **Maintain Valid Resolution Types** screen to define the types of finds, or resolutions, that are acceptable for the assets in the baseline. This screen enables one to select one or more applicable Resolution Types and the valid persons that can create resolutions against the campaign within a specified time frame. For example, define the valid resolution type for a given campaign to be a barcode scan by the steward or the custodian of an asset, but not by the user.

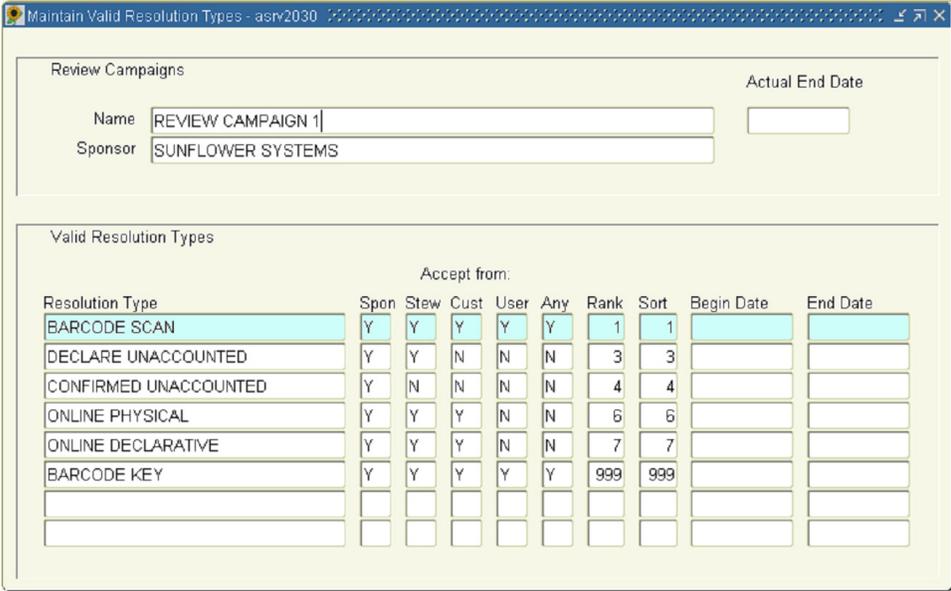
The date ranges allows one to limit when certain Resolution Types will count against that campaign. For example, one may wish to allow Barcode Scans to be valid throughout the entire campaign; while preferring to limit Confirmed Unaccounted Resolution Types to be logged towards the end of a campaign to ensure people have had enough time to find the assets.

Sunflower Administrators can define additional Resolution Types as needed, either event-based, declarative, or physical types. An example of an event-based resolution type is when a Work Order is completed.

Organizations can choose to have this event generate an automatic resolution. Please refer to the Administrator User Guide section on how to maintain Complex Domains.

Scenario: The following graphic illustrates how to enter the accepted resolution types for the campaign.

- NAVIGATION**
- Click Review
  - Click Maintain Valid Resolution Types



Step 1. Navigate to the **Maintain Valid Resolution Types** screen.

Step 2. Enter the desired review campaign name in the **Name** field and click the **Find** icon to retrieve. The other fields in the **Review Campaigns** block automatically populate upon making a selection.

NOTE: To retrieve the Resolution information for all review campaigns, place the cursor in the **Name** field and click the **Find** icon. Use the **Previous Record** and **Next Record** icons to navigate through the records.

**Step 3.** Enter the acceptable resolution types for the campaign in the **Resolution Type** field of the **Valid Resolution Types** block. Click the **List** icon for a list of resolution types.

NOTE: When using MobileTrak, select Barcode Scan, Barcode Key or both as valid resolution types.

**Step 4.** Enter a **Y** in the fields from whom the resolutions can be accepted, otherwise, enter an **N** in the **Accept from** fields.

The following are definitions of each of the fields:

- **Sponsor** - An asset center representative of the review campaign's sponsor.
- **Steward** - An asset center representative of the asset's steward.
- **Custodian** - The Custodian of the asset.
- **User** - The user of the asset.
- **Any** - Anyone.

**Step 5.** Enter the preference rank assigned to the resolution type for this campaign in the **Rank** field.

NOTE: One (1) is the highest rank possible. This determines which find counts if found by more than one method or resolution type.

**Step 6.** Enter the sort order assigned to the resolution type in the **Sort** field.

NOTE: The sort order determines the order that the resolution type is presented when reporting on assets found.

**Step 7.** Enter the first date the resolution type can be accepted in the **Begin Date** field.

NOTE: Double-click in the field to open the calendar function window. If one does not want to restrict when one can accept the resolution type, leave this field blank. Begin and End Dates are optional. Resolutions logged after this date will count against this campaign.

**Step 8.** Enter the last date the resolution type can be accepted in the **End Date** field.

NOTE: Double-click in the field to open the calendar function window. If one does not want to restrict when one can accept the resolution type, leave this field blank. Begin and End Dates are optional. Resolutions logged before this date will count against this campaign.

NOTE: Any resolutions logged outside these dates will be logged, but will not count against the campaign.

**Step 9.** Click the **Save** icon to save the resolution types for the review campaign.

## LINK BASE ASSETS TO EXISTING RESOLUTIONS

During a review campaign, one may choose to modify the base assets of the campaign, (to include a large number of new assets, for example); or change the valid resolutions for that campaign. Should one make either of these changes, one will need to re-align the frozen baseline with the campaign's valid resolution types using the Relink Base Assets with Resolutions screen. This enables one to link any of the new base assets with any existing or new resolutions. This step should also be conducted any time one sets up a new campaign.

Scenario: The following graphic illustrates how to use the Relink Base Assets with Resolutions screen to update the campaign.

### NAVIGATION

- Click Review
- Click Relink Base Assets with Resolutions

The screenshot shows a window titled "Relink Base Assets with Resolutions - asrv2050". Inside the window, there is a section titled "Open Review Campaigns with Frozen Bases". Below this title is a table with two columns: "Link" and "Sponsor". The table contains several rows, each representing a review campaign. The first row is "INACTIVE REVIEW A" with a checkbox in the "Link" column and "SUNFLOWER SYSTEMS" in the "Sponsor" column. The second row is "REVIEW CAMPAIGN 1" with a checkbox in the "Link" column and "SUNFLOWER SYSTEMS" in the "Sponsor" column. The third row is "REVIEW CAMPAIGN 2" with a checked checkbox in the "Link" column and "ASSET CENTER XX" in the "Sponsor" column. The remaining rows are empty, with checkboxes in the "Link" column and blank fields in the "Sponsor" column.

Link	Name	Sponsor
<input type="checkbox"/>	INACTIVE REVIEW A	SUNFLOWER SYSTEMS
<input type="checkbox"/>	REVIEW CAMPAIGN 1	SUNFLOWER SYSTEMS
<input checked="" type="checkbox"/>	REVIEW CAMPAIGN 2	ASSET CENTER XX
<input type="checkbox"/>		

**Step 1.** Navigate to the **Relink Base Assets with Resolutions** screen.

**Step 2.** Enter the desired review campaign name in the **Name** field and click the **Find** icon to retrieve. The other fields in the **Review Campaigns** block automatically populate upon making the selection.

**NOTE:** To retrieve information for all review campaigns, place the cursor in the **Name** field and click the **Find** icon. Use the **Previous Record** and **Next Record** icons to navigate through the records.

**Step 3.** Select the **Link** check box next to the review campaign that is needed to relink with the modified resolutions.



Step 4. Click the **Save** icon to relink the base assets.

## CLOSE REVIEW CAMPAIGN

Once the campaign is complete it is important to close it so no further resolutions can be logged against that campaign. Entering an Actual End Date on the Maintain Review Campaigns screen will ensure that any resolutions logged after that date will not be counted for that campaign.

Scenario: The following graphic illustrates how to close a campaign.

### NAVIGATION

- Click Review
- Click Maintain Review Campaigns

The screenshot shows a window titled 'Maintain Review Campaigns - asrv2010'. The main area is titled 'Review Campaigns' and contains the following fields:

- Name: ANNUAL REVIEW CAMPAIGN
- Sponsor: SUNFLOWER SYSTEMS
- Campaign Type: INVENTORY
- Sample Type: POPULATION
- Base Source: RULE GENERATED
- Audit of: (empty)
- Culminated by: (empty)
- Begin Date: 10/07/2011
- Expected End Date: 12/31/2011
- Actual End Date: 12/15/2011
- User Fields\*: (empty)

At the bottom of the form are three buttons: 'Comment', 'Freeze Status', and 'Resolutions'. The 'Actual End Date' field is highlighted in yellow.

**Step 1.** Navigate to the **Maintain Review Campaigns** screen.

**Step 2.** Click the **Find** button.

**Step 3.** Enter the name of the review campaign in the **Name** field.

**Step 4.** Click the **Find** button.

**Step 5.** Enter the date the review campaign actually ends in the **Actual End Date** field.

**NOTE:** Double-click in the field to display a calendar for selection of dates. This date freezes the results of the campaign.

**Step 6.** Click the **Comment** button at the bottom of the screen to display the **Capture Comments, Pictures, and Attachments** screen if one wants to enter a comment for a review campaign closure.

NOTE: Add comments, pictures or attach supporting documentation as needed. Click the **Save** icon to return to the **Maintain Review Campaigns** screen.

[Step 7](#). Click the **Save** icon to close the review campaign.

## EXECUTE REVIEW CAMPAIGNS

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As noted in the pages above, through a combination of the online screens and the barcode scanner, users will log resolutions in an attempt to complete each review campaign. Again, the goal of each review campaign should be to log resolutions against 100% of each campaign's base assets.

Once users begin logging resolutions they will use the Review Reports to track the progress of the campaign. As one runs reports and determines there are assets still missing, continue to look for these assets and log resolutions as they are found. If one still has assets with open resolutions towards the end of the campaign, it is at this time that one should log “negative” resolutions, such as Declare or Confirmed Unaccounted, for these assets. Once logging these resolutions, it is a good idea to run a report listing assets with these “negative” resolution types to determine which assets should then be retired (final evented) in Sunflower. The steps outlined in this section include:

1. Record Resolutions
2. Record Resolutions using HTML pages
3. Lookup Resolutions
4. Load Resolutions from an External Source
5. Delete Resolutions
6. Maintain Review Accruals
7. Process Resolution Interface Records
8. Correct Resolution Interface Errors
9. Run Reports to Track Progress of Campaign

## RECORD RESOLUTIONS

Once the review campaign is setup by the Review Manager, users can then begin to search for assets and log resolutions against that campaign. There are several ways to log resolutions. Users can:

- Log Barcode Scan or Barcode Key resolutions using a barcode scanner with Sunflower's MobileTrak software
- Log resolutions online using the **Create Asset Resolutions** screen
- Log resolutions online using Sunflower's HTML pages

The Review Manager defines who is eligible to log resolutions for each review campaign. For example, an organization may or may not allow people listed as "users" on asset records to log resolutions through the HTML pages. Or perhaps the organization will allow anyone - including summer interns - to log assets using the barcode scanner, but will not allow anyone to log online resolutions through the Sunflower forms or HTML pages.

Sunflower is flexible and will allow users to log resolutions for any type of interest asset. For this reason, each interest type module has its own screen with which users may log resolutions (e.g., Inventory, Agreement, Excess, etc.) This is the Create Asset Resolutions screen.

## CREATE RESOLUTIONS

The **Create Resolutions** screen should be used to log resolutions for assets that are found but not scanned, or for asset assets that simply cannot be found. Users can create resolutions for the various interest assets that Sunflower supports (e.g. Agreement, Inventory, Finance, Inactive and Excess assets).

Scenario: The following graphic illustrates how to use the Create Resolutions screen to create resolutions for an inventory asset that is part of a review campaign.

### NAVIGATION

- Click Review
- Click Create Resolutions
- Click Create Inventory Asset Resolutions

The screenshot shows the 'Create Inventory Asset Resolutions' window. The 'Resolutions' section contains the following fields:

- Type: ONLINE PHYSICAL
- Location\*: LIVERMORE\_BUILDING\_B\_ROOM\_E
- Recorded By: 050167
- Last Name\*: FRAZIER
- First: TIMOTHY
- Mid: M
- Update Location? (checked)

The 'Assets' section is a table with the following columns: Ok, Identifier, Manufacturer / Model / Official Name\*, Location\*, Stock Number, Quantity, and Unit of Measure. The first row is checked and populated with the following data:

Ok	Identifier	Manufacturer / Model / Official Name*	Location*	Stock Number	Quantity	Unit of Measure
<input checked="" type="checkbox"/>	0101	APPLE_M5555_COMPUTER PORTAL	SAN FRANCISCO			EA
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

A 'Message' field is located at the bottom of the screen.

**Step 1.** Navigate to the **Create Inventory Asset Resolutions** screen.

**Step 2.** Enter the resolution type in the **Type** field of the **Resolutions** block.

- Sunflower displays additional fields depending on the resolution type that is chosen.
- Click the **List** icon to display a list of possible resolution types.

**Step 3.** Enter the resolution information in the displayed fields.

**Step 4.** Enter the asset's identifier in the **Identifier** field of the **Assets** block. Click the Tab key and the asset information automatically populates.

**NOTE:** By default, assets displayed in the **Assets** block have the delta check box checked, indicating that when committing the record, a resolution will be created for the checked assets. If one does not want to create a resolution for a particular asset, uncheck the check box next to that respective asset.

NOTE: To search for assets, place the cursor in the **Identifier** field and click the **Find** icon top open the **Query Criteria** screen. Enter the criteria for the assets that one wants to create a resolution. Click the **Execute** button to return the desired assets. Here, users can query based on Resolution Types and/or Review Campaigns. All Resolution Types are available in the list of values, including “Open”, so users can query off all assets in a Review Campaign that have Open Resolutions.

#### NAVIGATION

- Click Find

**Step 5.** If using the Query Criteria screen to search for assets, enter the search parameters and click on **Execute** when complete.

**Step 6.** Click the **Save** icon to create resolutions for the selected assets.

Sunflower checks the **Ok** check box next to those assets for which a resolution was successfully created. If a resolution could not be successfully created, Sunflower indicates the reason in the **Message** field.

If one makes a request to create resolutions for multiple assets, the bottom of the screen indicates the number of assets for which the resolution was successfully created. For example, (**Transaction complete. Successfully saved 12 of 12 records**), indicating that resolutions for all twelve assets were successfully created.

## CREATE RESOLUTIONS USING HTML PAGES

Users can log resolutions through the Sunflower Enterprise HTML Transaction Pages using the to record a resolution button. The HTML pages allow Custodians and Users of assets to record resolutions on any assets where they are listed as a Custodian or a User.

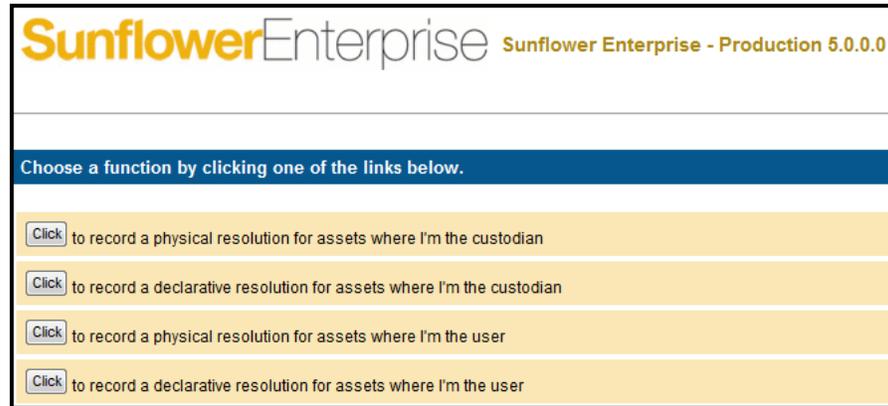
Scenario: The following graphic illustrates how to use the to record a resolution HTML page to log a resolution. Navigate to the Sunflower Enterprise HTML Pages, to record a resolution button.

The screenshot displays the 'Resolution Information' section with a 'Location' dropdown menu set to 'LVERMORE'. Below this are several buttons: 'Save', 'Enter Query', 'Select All', 'De-select All', 'Show Asset Details' (with a checkbox), and 'Manually List Assets'.

The 'Query Results' section shows a table with the following data:

Resolve	Identifier	Manufacturer	Model	Official Name	Resolution Date
<input checked="" type="checkbox"/>	0101	APPLE	M5555	COMPUTER PORTABLE	10/07/2011 07:50:19
<input checked="" type="checkbox"/>	0102	DELL	D333	COMPUTER PERSONAL	
<input checked="" type="checkbox"/>	0103	GATEWAY	SOLO 9100	COMPUTER PORTABLE	
<input checked="" type="checkbox"/>	0104	GATEWAY	SOLO 9100	COMPUTER PORTABLE	
		FORD MOTOR			05/07/1998

NOTE: Depending on whether the person logged in is listed as the User or the Custodian, select one of the buttons displayed in the screenshot below.



- Step 1.** Depending on which button is selected above, the screen will populate any assets where the person logged in is listed as the User or the Custodian.
- Alternatively, the user can query for assets using the **Enter Query** button, entering the search criteria, then clicking on the **Execute Query** button. Here, users can query by Resolution Type and/or Review Campaign. All Resolution Types are available in the list of values, including "Open", so users can query off all assets in a Review Campaign that have Open Resolutions.

Cancel Query Execute Query Recall Last Query Clear Manually List Assets

**Query Criteria**

Assigned  Requested

Steward

Custodian Identifier  Name  OWNER REPOSITORY

User Identifier  Name

Site

BUILDING  ROOM

Structure Level 3

Manufacturer

Model

Official Name

Serial Number

Identifier

Unique Name

Resolution Type

Review Campaign

**Step 2.** Enter the Location where the asset(s) were found (for physical resolutions).

- Alternatively, if logging a declarative resolution, one does not select a location, simply query the assets.

**Step 3.** Click the **Select All** button to log resolutions for all of the assets listed; or hit the Resolve button next to each Identifier to log a resolution for single assets.

**Step 4.** Click the **Save** button.

- Sunflower will place a green **OK** under the Resolve column for each asset indicating the resolutions were saved.

## LOOKUP RESOLUTIONS

Sunflower keeps a complete history of resolutions recorded over time for assets, as well as a history of which campaigns those resolutions were applied to. Users can review the resolutions using the **Lookup Resolutions** screen.

Scenario: The following graphic illustrates how to lookup the asset resolutions that have been previously recorded for an inventory asset.

### NAVIGATION

- Click Review
- Click Lookup Resolutions
- Click Lookup Inventory Asset Resolutions

Review Campaign	Begin Date	End Date
ANNUAL REVIEW CAMPAIGN	10/07/2011	
REVIEW CAMPAIGN 1	05/01/1998	

**Step 1.** Navigate to the **Lookup Inventory Asset Resolutions** screen.

**Step 2.** Enter the asset identifier in the **Identifier** field of the **Assets** block. Use the asset identifier to retrieve information about the resolution which includes:

- The type of resolution used to find the asset (e.g. barcode scan, online physical, declared accounted, etc.)
- The name of the campaign(s) to which the resolution is linked. There may be multiple resolutions for an asset.

**NOTE:** To search for assets, place the cursor in the **Identifier** field and click the **Find** icon top open the **Query Criteria** screen. Enter the criteria for the assets that one wants to create a resolution. Click the **Execute** button to return the desired assets.

- The **Resolutions** block displays the resolution type and other information about the resolution.

- The **Review Campaigns** block displays review campaign information if the resolution is linked to a review campaign.

**Step 3.** With the cursor in the **Resolutions** block, use the **Previous Record** and **Next Record** icons to navigate through the resolutions.

## DELETE RESOLUTIONS

Use the Delete Resolutions screen to remove a recorded resolution. This screen enables users to search on and delete resolutions for one asset at a time.

Scenario: The following graphic illustrates how to delete the asset resolution that had been previously recorded.

### NAVIGATION

- Click Review
- Click Delete Resolutions
- Click Delete Inventory Asset Resolutions

Review Campaign	Begin Date	End Date
ANNUAL REVIEW CAMPAIGN	10/07/2011	
REVIEW CAMPAIGN 1	05/01/1998	

**Step 1.** Navigate to the **Delete Inventory Asset Resolutions** screen.

**Step 2.** Enter the asset identifier in the **Identifier** field of the **Assets** block.

**NOTE:** To search for assets, place the cursor in the **Identifier** field and click the **Find** icon top open the **Query Criteria** screen. Enter the criteria for the assets that one wants to create a resolution. Click the **Execute** button to return the desired assets.

- The **Resolutions** block displays the resolution type and other information about the resolution.
- The **Review Campaigns** block displays review campaign information if the resolution is linked to a review campaign.

**Step 3.** With the cursor in the **Resolutions** block, use the **Previous Record** and **Next Record** icons to navigate to the resolutions that one wants to delete.

Step 4. Click the **Remove Record** icon.

Step 5. Click the **Save** icon to delete the resolution.

## MAINTAIN REVIEW ACCRUALS

A review accrual is a way for an organization to offset losses during a review campaign by counting items they find during the campaign. For example: While performing a campaign users may run across five assets that should be tagged but aren't. Users tag these, and then add the asset record through Sunflower Assets or Sunflower's MobileTrak.

Then, using the Maintain Review Accruals functionality, one would designate the five new items as accruals for the campaign. When the report is run, these assets will be displayed as review accruals for the selected campaign. So while one may have lost five or more assets as part of a campaign, the review accrual allows offsetting these losses by finding other assets.

### NAVIGATION

- Click Review
- Click Maintain Review Accruals

**Step 1.** Enter the interest asset type (Inventory, Excess, etc.) and the asset identifier in the **Type/Identifier** fields. Click the Tab key to display the asset's information.

NOTE: The **Datetime** field automatically populates in the **Review Accruals** block.

**Step 2.** Double-click in the **Location** field to display the **Maintain Locations** screen and enter the location that asset was found. Click the **Save** icon to return to the **Maintain Review Accruals** screen.

**Step 3.** Enter the name of the review campaign on which the asset is reportable in the **Review Campaigns** field of the **Reportable on** block.

**Step 4.** Click the **Save** icon to save the accrual information.

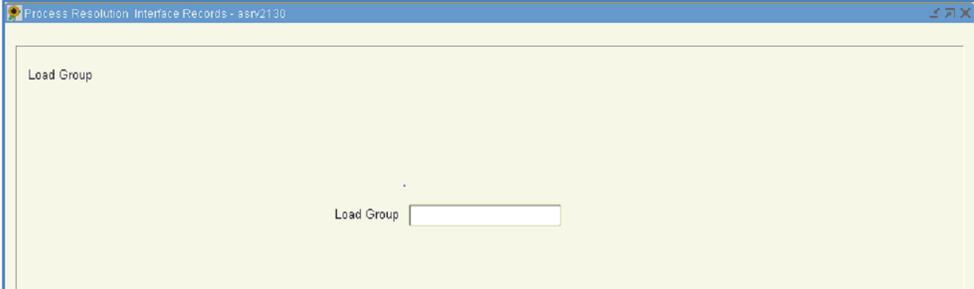
## LOAD RESOLUTIONS FROM AN EXTERNAL SOURCE

Use the **Process Load Resolutions** screen to mass load resolutions from any external source such as a spreadsheet or barcode scanner. When an upload occurs, the group of assets uploaded is assigned a “Load Group”. If any errors occur with that upload, (such as an invalid Operator Identifier or invalid Location entered in the barcode scanner), this screen can be used to re-process these resolutions en masse once the errors are corrected in Sunflower.

For example, if an invalid Location is entered for 20 assets on the barcode scanner, these resolutions would error out because Sunflower doesn't recognize the Location. Once that Location is added in Sunflower's reference tables, this screen would be used to re-process that Load Group, which would then link those resolutions with the asset records. Put another way, once the new Location is added Sunflower now recognizes this Location as valid, so Sunflower would now allow users to link the resolutions with those asset records.

### NAVIGATION

- Click Review
- Click Process Load Resolutions



The screenshot shows a web application window titled "Process Resolution Interface Records - 38rv2130". The main content area is a light yellow box. At the top left of this box is the text "Load Group". In the center of the box, there is a label "Load Group" followed by a white text input field.

**Step 1.** Navigate to the **Process Load Resolutions** screen.

**Step 2.** Enter the value that identifies the external source in the source **Load Group** field.

**Step 3.** Click the **Save** button to mass load the resolutions.

## EDIT RESOLUTION INTERFACE RECORDS

The **Edit Resolution Interface Records** screen is used to correct data that errored out while processing resolutions from the **Process Load Resolutions** screen or from the barcode scanner. This screen is used to update one asset record at a time (whereas on the previous pages we re-processed errors, correcting several errors at a time.) An example of when one may need to use this screen is if inputting an invalid Operator Identifier in the scanner while scanning assets. Upon upload, Sunflower would reject the Operator Identifier and place the resolution record in the **Edit Resolution Interface Records** screen. (Think of this screen as a “holding tank”, where errors are placed to be corrected before having the resolutions applied to the asset records.) In this example, this screen would be used to update the Operator Identifier to a valid Operator name, and once that is done the resolution would be applied to the asset record.

### NAVIGATION

- Click Review
- Click Edit Resolution Interface Records

The screenshot shows the 'Edit Resolution Interface Records' window. At the top, there are fields for 'Load Group' (BCR-111011142407), 'Record Group' (E1-6), and 'Processed'. Below this is an error message: 'SA-01090: Unable to determine value for AS\_RESOLUTION.PERSON\_ID from value 'Identifier: ADM, '(Identifier:INV - 0101 Type:Date/Time:08/31/2011 23:28:04 Site:1 Stk1:TRUCK Stk2:TRACK NUM Stk3:'. The main form has several sections: 'Interest Entity', 'Prefix' (INV), 'Name' (0101), 'Asset ID', 'Quantity', 'Asset Mark Id', 'Unit of Measure', 'Device Id', 'Device Identifier' (0000000051), 'Resolution Type Id', 'Code' (BCK), 'Description', 'Recorded by' (ADM), 'Recorded on' (08/31/2011 23:28:04), 'Timezone' (GMT), 'Upd Loc?' (N), 'Location', 'Site' (5000000020), 'Code' (1), 'Site', 'Structure Level 1', 'Stk1', 'Code' (TRUCK), 'Stk1 Type', 'Structure Level 2', 'Code' (TRACK NUM), 'Stk2 Type', 'Structure Level 3', and 'Mail Stop'.

The **Edit Resolution Interface Records** screen displays the information that was entered using either Sunflower's MobileTrak software or the Process Load Resolutions screen. If records appear on this screen, the information likely requires edits before the resolutions can be applied to the asset records.

The above example tells us that at least one error is preventing the resolution from being linked to the asset record. If one has trouble interpreting the error, look for key words in the error message. In this case, it appears the PERSON\_ID of the person logging the resolution through MobileTrak is invalid, so the user must input a valid name into the Edit Resolution Interface Records screen. Upon saving the correction, if one has multiple errors for a record, the next error message will appear and will need correction. Once all errors are

corrected and saved for a record the resolution would be applied to the asset. If one has multiple records with errors, scroll through the error messages by clicking the next record icon or the arrow keys on the keyboard to review all of the error messages.

- Step 4.** Navigate to the Review module's **Edit Resolution Interface Records** screen.
- Step 5.** To retrieve a specific load group, click the **Find** icon, enter the desired load group, and click the **Find** icon again.
- Step 6.** To retrieve all the load groups, place the cursor in the **Load Group** field, press the **Execute Query** key (From the **Help** menu, choose **Keys** to see which key is assigned as the **Execute Query** key). Use the **Previous Record** and **Next Record** icons to navigate to the desired resolution.
- Step 7.** Correct Resolution errors as needed, then click the **Save** icon. This will save one record. To save additional records, use the arrow keys on the keyboard and save each time.

## EDIT INTEREST ASSET INTERFACE RECORDS

While the Edit Resolution Interface Records screen described above allows users to correct errors in order to link resolutions to asset records, the various **Edit Interest Asset Interface Records screens** are used to ensure asset receipts and updates are processed correctly.

For example, if an invalid Catalog entry is used to receive a new asset through the barcode scanner (or through upload), that record would error out upon upload and be placed in the asset's corresponding Edit Asset Interface screen (Agreement, Inventory, Excess, etc.). In this example, the user would either have the new Catalog entry added, then process the error in the Edit Asset Interface screen; or the user would update the Catalog in the Edit Asset Interface screen to a correct value.

Other examples of when a user may have to use this screen is if an invalid person is entered into the scanner, or if an invalid Location is selected when updating or adding assets.

### NAVIGATION

- Click Review
- Click Edit Inventory Asset Interface Records.

**Step 1.** Navigate to the **Inventory (Agreement, etc.) Edit Inventory Asset Interface Records** form.

**Step 2.** Click the **Find** button.

**Step 3.** Enter the **Load Group** or **Record Group**.

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

**Step 5.** Review the error message at the top of the screen.

**Step 6.** Click the **Go To Error** button.

**Step 7.** Correct the error on one of the various tabs, then click the **Save** button.

**NOTE:** If an asset has multiple errors, at this point a new error message will appear to be corrected. If the asset had only one error, the new information entered will be applied to the asset record.

## REVIEW (PHYSICAL INVENTORY) REPORTS

There are a variety of Review reports that can help track the progress of the review campaigns.

Reports such as the Review Campaign Base Assets with Resolution Information report will allow one to determine which of the campaign's assets have open resolutions vs. which of the campaign's assets have received resolutions.

Reports such as the Executive Review Resolution Summary and Review Resolution Summary show managers the progress of each campaign by numbers, percentages and dollar values of assets found, not found and with open resolutions.

Additional review reports are available to allow one to determine who is logging which resolutions, and whether or not assets have been found at a location different than what is listed on the asset record. And like all Sunflower reports, the Review reports display real-time information. Therefore, assuming resolutions have been logged throughout the day, a report run in the afternoon will differ from a report run in the morning.

There are several output options available for 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. The following list includes reports that can be used to manage the inventory review cycle:

### **Review Campaign Properties Report**

The **Review Campaign Properties Report** to display the details of the campaign parameters.

### **Review Resolution Summary Report**

The **Review Resolution Summary Report** displays a summary of physical inventory results. This report displays percentages by count and value of assets that have been found and not found, broken out by Flag.

### **Executive Review Resolution Summary Report**

The **Executive Review Resolution Summary Report** is a summary of the campaign progress and status.

### **Review Campaign Base Assets Report**

The **Review Campaign Base Assets Report** shows the details of the review campaign base assets by resolution type (e.g. open, barcode scan and barcode key) for a selected review campaigns.

### **Review Campaign Base Assets with Resolution Information Report**

The **Review Campaign Base Assets with Resolution Information Report** provides users a detailed view of all the assets in a given Review Campaign, and whether the assets have resolutions or still need to be given resolutions. This report allows users to see exactly what has been found and what hasn't; and if resolutions were logged, it shows what Resolution Types the assets were given. As needed, the printed report can also be used to capture hand-written changes to asset details.

### **Base Asset Interface Processing Results Report**

The **Base Asset Interface Processing Results Report** displays the results of processing the contents of interface table AS\_LOAD\_BASE\_ASSETS, a mechanism which is used to load review baselines from files.

### **Review Resolution Summary by Person Report**

The **Review Resolution Summary by Person Report** displays a summary, by resolution type and person, of resolutions captured for a selected set of review campaigns.

### **Current Resolutions at Different Location than Asset Report**

The **Current Resolutions at Different Location than Asset Report** displays assets whose last physical inventory review occurred at a different location than the location of the asset record.

### **Review Accruals Report**

The **Review Accruals Report** displays untagged assets found, and lost assets recovered, for a selected set of review campaigns.

### **Retired Assets with Resolution Report**

The **Retired Assets with Resolution Report** displays a summary of assets that are retired and had resolutions recorded against them after the Final Event.

### **Overages Report**

The **Overages Report** displays items that are found during an inventory that are not in the Review Base and are not in the any of the interest modules (Agreement, Management, etc.).

**Resolution Interface Processing Results Report**

The **Resolution Interface Processing Results Report** displays resolution errors and successes once assets are uploaded from the scanner, (if using Sunflower's MobileTrak). Any errors should be corrected in the Edit Resolution Interface Records screen.

## BARCODE MENU

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The Barcode Module is used to review changes made to records through MobileTrak, and to help review and correct MobileTrak errors thorough more user-friendly screens.

Two screens and are available through the Barcode Module: **Difference Detail by Asset** and **Error Detail by Error Code**. **Difference Detail by Asset** shows the error messages for individual assets, provides an easy way to view changes made to asset records - showing both Old (Current) Values and New (As Recorded) Values, and allows navigation to the **Edit Interface Record** screen to correct error messages.

The **Error Detail by Error Code** screen allows viewing and correcting multiple assets containing the same error message.

## DIFFERENCES DETAIL BY ASSET

The **Differences Detail by Asset** screen provides the ability to review and correct errors that occurred in MobileTrak by allowing users to compare Old (Current) Values and New (As Recorded) Values, (i.e. values that were previously on asset records to values that were updated in the scanner). The screen also displays information on assets that are added in MobileTrak through the Receiving process. Authorized users can use this screen in lieu of the **Edit Interface Records** screens to review, correct and process information, allowing the corrected data to be applied to the asset records.

NOTE: Much like in the Edit Interface Records screens, assets with no errors do not appear on this screen.

The **Differences Detail by Asset** screen can be queried by Load Group or Record Group, and will display errors for one asset at a time. Once records are queried, the error message for the asset will appear, along with the Current and New values, so users can easily determine what was changed during the scanning process.

The table below outlines the functionality available on the Differences Detail by Asset screen:

FIELD NAME	DESCRIPTION
<b>Transaction type</b>	The text above the Show All? button denotes whether the transaction is an Update Record or New Asset transaction.
<b>Show All? button</b>	Used to toggle between only the information that was updated on the asset record and all the information on the asset record. If checked, the screen will show all the asset information; if unchecked (the default) it will only show information that was updated during the scanning process.
<b>Code</b>	As a field is highlighted at the bottom of the screen, the name of this field will change based on which value was selected below. Depending upon the field that is selected, changes to the record are either typed here or selected from a valid list of values. For example, if the Custodian Last Name field is selected the Code will change to Custodian Last Name and the user can select a new last name from the list of values.
<b>Change button</b>	Processes any changes entered in the Code field. Once the information has been updated in that field, (Last Name, for example), the Change button will update the information on the screen. Note: Changes are processed upon saving.
<b>Field/Context</b>	Displays the name of the field.
<b>Old (Current) Value</b>	Displays the value that was on the asset record before scanning, or, if no changes were made, the current value.
<b>New (As Recorded) Value</b>	Displays the value input during the scanning process.
<b>Print Report button</b>	Generates the Bar Code Reader (BCR) Upload - Differences Detail by Asset report. This report displays all asset information, whether that information was updated or not. Note: Running this report directly from the Differences Detail by Asset screen shows information for that one record only. If run through the menu paths in Forms, (Barcode > Barcode Reports), generate this report by Load Group and see all the records associated with that Load Group.
<b>Edit Interface Record button</b>	Takes the user directly to the corresponding Edit Interface Record screen, (e.g. Agreement or Inventory), where errors can also be reviewed, corrected and processed. Note: This takes the user to that specific Interest's Edit Asset Interface screen. For example, if an Agreement Asset is scanned, this button will take the user to the Edit Agreement Asset Interface Records screen. If an Inventory Asset is scanned, this button will take the user to the Edit Inventory Asset Interface Records screen. Note: When an update is made in the Edit Inventory (or Agreement, etc.) Asset Interface Records screen, the update is automatically made in the Differences Detail by Asset screen. Note: From the Edit Asset Interface Record screens, users will have to re-query to see other records. When this screen is first entered through the Differences Detail by Asset screen, the user is taken only to that specific record.

**NAVIGATION**

- Click Barcode
- Click Differences Detail by Asset

Update Inventory Asset

Show All? Code

Modified?	Field/Context	Old (Current) Value	New (As Recorded) Value
<input checked="" type="checkbox"/>	Code	1	LATITUDE E3500
<input checked="" type="checkbox"/>	Model	D333	
<input checked="" type="checkbox"/>	Official Name	COMPUTER PERSONAL	
<input checked="" type="checkbox"/>	Manager Code	SFS	
<input checked="" type="checkbox"/>	Steward Code	SCOTT	
<input checked="" type="checkbox"/>	Existing Interest Identifier	SDHBC5	
<input checked="" type="checkbox"/>	Site Class	2	MIAMI
<input checked="" type="checkbox"/>	Site Description	ARLINGTON	
<input checked="" type="checkbox"/>	Structure Level 1 Type Code		BUILDING
<input checked="" type="checkbox"/>	Structure Level 2 Type Code		ROOM
<input checked="" type="checkbox"/>	recorder_first_name		TINA
<input checked="" type="checkbox"/>	recorder_middle_name		E

**Step 1.** Navigate to the **Differences Detail by Asset** form.

**Step 2.** Execute a query by **Load Group** or **Record Group**.

**Step 3.** Click in the field that needs updating.

Differences Detail by Asset: asmn2210

Load Group: BCR-120411085443    Record Group: SF50TEST-2

Identifier: SDHBC5    Recorded by: HOPKINS TINA E THOPKINS

SA-01090: Unable to determine value for AS\_ASSET.CATALOG\_ID from value 'mfr\_id: mfr\_code: mfr\_name:DELL model\_no:LATITUDE E3500' (Identifier: SDHBC5 INV - Site:MIAMI, FL Stn:1:BUILDING Stn2:ROOM Structure Level 3)

Update Inventory Asset    Model: LATITUDE E3500

Show All?   

Field/Context	Old (Current) Value	New (As Recorded) Value
<input checked="" type="checkbox"/> Code	1	
<input checked="" type="checkbox"/> Model	D333	LATITUDE E3500
<input checked="" type="checkbox"/> Official Name	COMPUTER PERSONAL	
<input checked="" type="checkbox"/> Manager Code	SFS	
<input checked="" type="checkbox"/> Steward Code	SCOTT	
<input checked="" type="checkbox"/> Existing Interest Identifier	SDHBC5	
<input checked="" type="checkbox"/> Site Class	2	MIAMI
<input checked="" type="checkbox"/> Site Description	ARLINGTON	
<input checked="" type="checkbox"/> Structure Level 1 Type Code		BUILDING
<input checked="" type="checkbox"/> Structure Level 2 Type Code		ROOM
<input checked="" type="checkbox"/> recorder_first_name		TINA
<input checked="" type="checkbox"/> recorder_middle_name		E

Step 4. Enter or search for the correct value in the field above the **Change** button.

Catalog Entries

Find: %

Model Number	Manufacturer
D333	DELL
TEST	DELL
X1	DELL
X2	DELL

Existing Interest Identifier: SDHBC5

Site Class: 2    MIAMI

Site Description: ARLINGTON

Structure Level 1 Type Code: BUILDING

Structure Level 2 Type Code: ROOM

recorder\_first\_name: TINA

recorder\_middle\_name: E

Step 5. Enter or select the correct value then hit **Change**.

Differences Detail by Asset - asmn2210

Load Group: BCR-120411095443    Record Group: SF50TEST-2  
 Identifier: SDHBC5    Recorded by: \_\_\_\_\_

SA-01090: Unable to determine value for AS\_ASSET.CATALOG\_ID from value 'mfr\_id: mfr\_name:DELL model\_no:LATTITUDE E3500' (Identifier: SDHBC5 INV - Site:MIAMI, FL Stn1:BUILDING Stn2:ROOM Structure Level 3)

Update Inventory Asset    Model: X1

Show All?   

Field/Context	Old (Current) Value	New (As Recorded) Value
<input checked="" type="checkbox"/> Code	1	
<input checked="" type="checkbox"/> Model	D333	X1
<input checked="" type="checkbox"/> Official Name	COMPUTER PERSONAL	TEST
<input checked="" type="checkbox"/> Manager Code	SFS	
<input checked="" type="checkbox"/> Steward Code	SCOTT	
<input checked="" type="checkbox"/> Existing Interest Identifier	SDHBC5	
<input checked="" type="checkbox"/> Site Class	2	MIAMI
<input checked="" type="checkbox"/> Site Description	ARLINGTON	
<input checked="" type="checkbox"/> Structure Level 1 Type Code		BUILDING
<input checked="" type="checkbox"/> Structure Level 2 Type Code		ROOM
<input checked="" type="checkbox"/> recorder_first_name		TINA
<input checked="" type="checkbox"/> recorder_middle_name		E

Step 6. Click **Save**, and the new information will be applied to the asset record.

Differences Detail by Asset - asmn2210

Load Group: BCR-120411095443    Record Group: SF50TEST-2  
 Identifier: SDHBC5    Recorded by: \_\_\_\_\_

OK (Identifier:SDHBC5 INV - Site:MIAMI, FL Stn1:BUILDING Stn2:ROOM Structure Level 3)

Update Inventory Asset    Model: X1

Show All?   

Field/Context	Old (Current) Value	New (As Recorded) Value
<input checked="" type="checkbox"/> Code	1	
<input checked="" type="checkbox"/> Model	D333	X1
<input checked="" type="checkbox"/> Official Name	COMPUTER PERSONAL	TEST
<input checked="" type="checkbox"/> Manager Code	SFS	
<input checked="" type="checkbox"/> Steward Code	SCOTT	
<input checked="" type="checkbox"/> Existing Interest Identifier	SDHBC5	
<input checked="" type="checkbox"/> Site Class	2	MIAMI
<input checked="" type="checkbox"/> Site Description	ARLINGTON	
<input checked="" type="checkbox"/> Structure Level 1 Type Code		BUILDING
<input checked="" type="checkbox"/> Structure Level 2 Type Code		ROOM
<input checked="" type="checkbox"/> recorder_first_name		TINA
<input checked="" type="checkbox"/> recorder_middle_name		E

As noted above, the **Bar Code Reader Upload - Differences Detail By Asset** report displays all asset information, whether that information was updated or not. This report contains a column indicating whether or not a value was updated (Y) or not (N), as well as the Old (Current) and new (As Recorded) Values shown on the screen.

NOTE: Running this report directly from the Differences Detail by Asset screen shows information for that one record only. If run through the menu paths in Forms, (Barcode > Barcode Reports), generate this report by Load Group and see all the records associated with that Load Group.

Modified?	Field/Context	Old (Current) Value	New (As Recorded) Value
Y	Serial Number The serial number assigned by the manufacturer		894802
Y	Manufacturer Name The organization's name, e.g. SUNFLOWER SYSTEMS		FORD MOTOR COMPANY
Y	Model The model number assigned by the manufacturer		TAURUS
Y	Official Name The institution's nomenclature for this mfr/model pair		SIGAN
Y	Custodian Identifier An identifier assigned by the institution, e.g. badge no		ACR1
Y	Custodian First The person's first name, e.g. JANE		CENTER
Y	Custodian Mid Init The person's middle name, e.g. ELIZABETH		REP
Y	Custodian Last Name The person's last name, e.g. SMITH		ASSET
Y	Manager Name The organization's name, e.g. SUNFLOWER SYSTEMS		SCOTT'S ORG
Y	Steward Name The organization's name, e.g. SUNFLOWER SYSTEMS		SCOTT'S ORG
Y	User Identifier An identifier assigned by the institution, e.g. badge no		W CHURCHILL
Y	Site Class The site's class, e.g. B2		DC
Y	Structure Level 1 Type Code The structure level 1 type's short name, e.g. BLDG		BUILDING

As noted above the various Edit Interface screens (shown below) can be accessed from the **Differences Detail by Asset** screen. For information on how to process error corrections through this screen, please refer to **Edit Interest Asset Interface Records** section of this User Guide.

Load Group  Record Group  Device Identifier

SA-01090 Unable to determine value for AS\_ASSET PERSON\_ID\_CUSTODIAN from value Identifier ACR1 ASSET, CENTER REP (Identifier:SDHADD02 Site:WASHINGTON, DC Site:BUILDING Site:ROOM Structure Level 3) Processed 03/21/2012 18:44:43

Action  Existing Interest Identifier

Interest Entity  Prefix  Name  Asset ID

Inventory Asset Id

Identifier

Unique Name

Asset Identifier Type  Code  Description

Manager  Code  Name

Owner  Code  Name

Steward  Code  Name

Catalog  Identifier\*

Manufacturer  Code  Name

Model  Model Name

Official Name

Asset Type  Class  Classification

Serial Number  Drawing No.

Flags: 1  2  3  4  5  6  7  8  9  10

Acquisition Date  Responsibility Date  Effective Date

Release Datetime  Accept Datetime  Expected Return Date

## BCR UPLOAD ERROR DETAIL BY ERROR CODE

The **BCR Upload Error Detail by Error Code** screen displays all assets that errored out for a particular reason, providing users a view of all assets that had the same error, and the ability to 'mass update' the assets with a single, valid value. The screen also provides the ability to update one asset at a time through the **Edit Interface Records** screens.

Each **Load Group** may have multiple error messages associated with it. These can be displayed by scrolling through the **Error Code/Context** fields. In the example below, the Load Group has at least two (2) errors, as noted in the **#Rows** field. Users should correct each of the errors found in this screen.

Also in the example below, both asset records were scanned with an invalid Custodian, so this screen can be used to update those assets with a valid Custodian.

### NAVIGATION

- Click Barcode
- Click Error Detail by Error Code

Load Group: BCR-120320054944

Error Code/Context: 502 AS-00502: INVALID CUSTODIAN #Rows: 2

Custodian Identifier: Last Name \*: First: Mid

Mass Update

Select All Unselect All

Ok Δ	Identifier	Custodian	Custodian Identifier	Last Name *	First Name	Mid
<input type="checkbox"/>	SDHADD1		ACR1	ASSET	CENTER	REP
<input type="checkbox"/>	SDHADD2		ACR1	ASSET	CENTER	REP
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

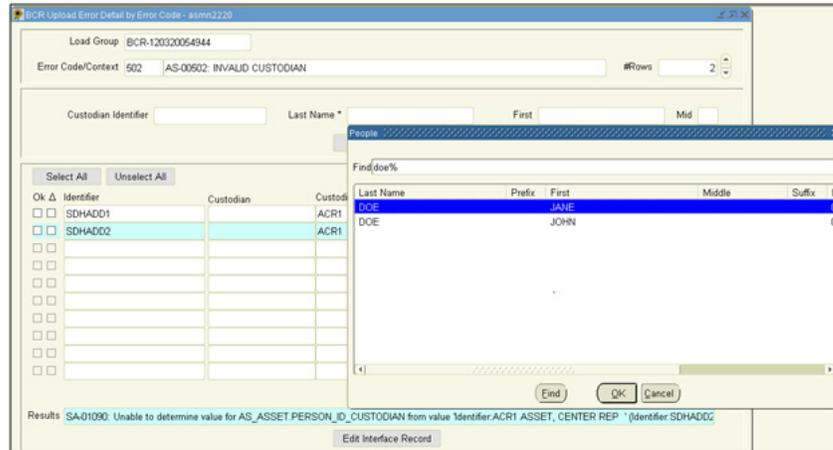
Results: SA-01090: Unable to determine value for AS\_ASSET.PERSON\_ID\_CUSTODIAN from value Identifier.ACR1 ASSET, CENTER REP ' (Identifier.SDHADD1

Edit Interface Record

**Step 1.** Navigate to the **Error Detail by Error Code** screen.

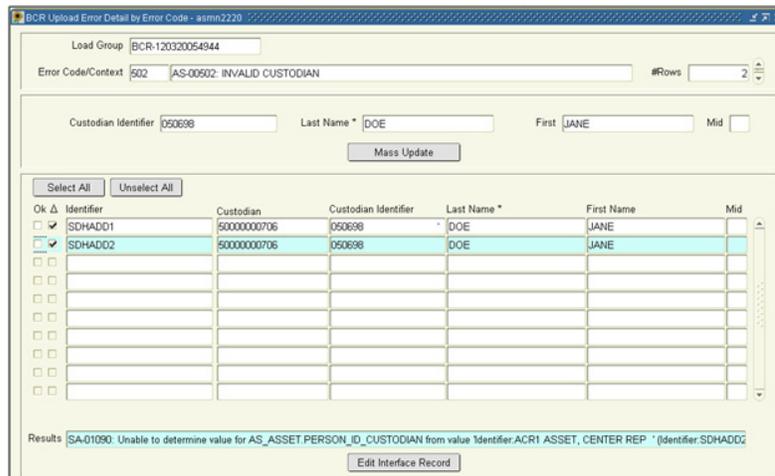
**Step 2.** Query by **Load Group**.

**Step 3.** Using the example above, enter or select a value **Custodian** above the **Mass Update** button.



Step 4. Once the value is selected, click on the **Select All** button, then click **Mass Update**.

- Alternatively, only select certain values by checking the delta (triangle) box to the left of the Identifier.



Step 5. **Save** the record. The changes will be applied to the asset records.

BCR Upload Error Detail by Error Code - asmn2220

Load Group: BCR-120320054944

Error Code/Context: 502 AS-00502: INVALID CUSTODIAN #Rows: 2

Custodian Identifier: 050698 Last Name \*: DOE First: JANE Mid:

Mass Update

Select All Unselect All

Ok	Identifier	Custodian	Custodian Identifier	Last Name *	First Name	Mid
<input checked="" type="checkbox"/>	SDHADD1	50000000706	050698	DOE	JANE	
<input checked="" type="checkbox"/>	SDHADD2	50000000706	050698	DOE	JANE	
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

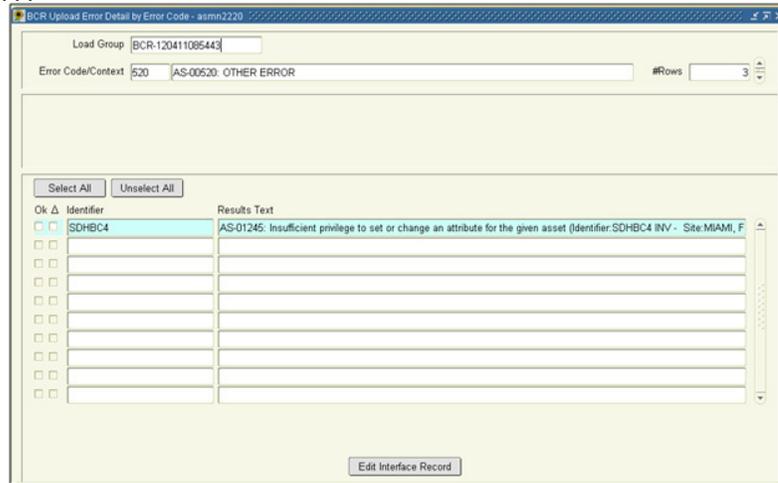
Results: OK (Identifier:SDHADD1 Site:WASHINGTON, DC SIV1-BUILDING SIN2-ROOM Structure Level 3)

Edit Interface Record

In other cases errors may have to be corrected through the **Edit Interface Record** screen, as there is no place on the **BCR Upload Error Detail by Error Code** screen to correct the error. The example below shows that the person scanning in MobileTrak is not authorized to update the record, therefore someone with authorization must use the **Edit Interface Record** screen to process the changes.

**NAVIGATION**

- Click Barcode
- Click Error Detail by Error Code



**Step 1.** Navigate to the **Error Detail by Error Code** form.

**Step 2.** Query by **Load Group**.

**Step 3.** Click on the **Edit Interface Record** button.

Step 4. An authorized user should correct the necessary errors here.

Step 5. Click **Save** to apply the information to the asset record.

## BARCODE REPORTS

Two reports are available in the Barcode menu to help manage the physical inventory process: the **BCR Upload Differences Detail By Asset** and the **Updates Made Through Inventory** report.

### BCR UPLOAD DIFFERENCES DETAIL BY ASSET REPORT

The **BCR Upload Differences Detail By Asset** report, as noted above, displays information on assets that errored out during the barcode scanning process. This allows users to determine which information was changed on the assets and decide whether the information should be processed or not. The report includes all information on the assets, whether information was updated on the asset in MobileTrak or not.

#### NAVIGATION

- Click Barcode
- Click Barcode Reports
- Click BCR upload Differences Detail By Asset report

**Step 1.** Navigate to **Barcode Reports**.

**Step 2.** Select **BCR upload Differences Detail By Asset** report.

**Step 3.** Select either the specific **Load Group** from the list of values to see all the assets associated with that Load Group, or select a particular **Record Group** (which will display one asset at a time).

**Step 4.** **Submit** and **Execute** the report.

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Load Group : BCM-120320054944      Record Group : SPLOTNET-3  
New Asset: SCNR0002

Modified?	Field/Context	Old (Current) Value	New (As Recorded) Value
N	Serial Number The serial number assigned by the manufacturer	SCNR0002	SCNR0002
Y	Code The asset condition's short name, e.g. 1, 2 and X	1	
N	Manufacturer Name The organization's name, e.g. SUNFLOWER SYSTEMS	DELL	DELL
N	Model The model number assigned by the manufacturer	D333	D333
N	Official Name The institution's nomenclature for this mfr/model pair	COMPUTER PERSONAL	COMPUTER PERSONAL
N	Custodian Identifier An identifier assigned by the institution, e.g. badge no	444409	444409
N	Custodian First The person's first name, e.g. JANE	JOE	JOE
N	Custodian Last Name The person's last name, e.g. SMITH	ANDERSON	ANDERSON
Y	Manager Code A alias for the organization, e.g. SFS	SFS	
N	Manager Name The organization's name, e.g. SUNFLOWER SYSTEMS	SUNFLOWER SYSTEMS	SUNFLOWER SYSTEMS
Y	Steward Code A alias for the organization, e.g. SFS	SCOTT	
N	Steward Name The organization's name, e.g. SUNFLOWER SYSTEMS	SCOTT'S ORG	SCOTT'S ORG
Y	Deer Identifier An identifier assigned by the institution, e.g. badge no	SDRPEINS	CYR18212R

Note that the report contains a column indicating whether or not a value was **Modified (Y)** or not (**N**), as well as the **Old (Current) Value** and **New (As Recorded) Value** shown on the screen.

## UPDATES MADE THROUGH INVENTORY REPORT

The **Updates Made Through Inventory** report contains a summary of the transactions within a particular Load Group. This report can be generated to include transactions occurring within a certain date range, as well.

### NAVIGATION

- Click Barcode
- Click Barcode Reports
- Click Updates Made Through Inventory

The screenshot displays the Sunflower Enterprise interface for the 'Updates Made Through Inventory' report. The header includes the Sunflower Enterprise logo and version information (Production 5.0.0.0). The main content area is titled 'Updates Made Through Inventory' and features a sidebar on the left with expandable sections: Parameters, Display Options, Sorting and Grouping, and File Output. The main form area contains a 'Load Group' dropdown menu and a date range selector labeled 'Include Updates Between' with input fields for '01/01/2009' and '07/30/2012'. At the top right of the form area, there are buttons for 'Barcode Reports Menu', 'Submit', and 'Clear'. The footer of the page contains the text 'ADMIN212 Sunflower Systems (c) 2012 All rights reserved Build 02202012'.

**Step 1.** Navigate to **Barcode Reports**.

**Step 2.** Select **Updates Made Through Inventory** report.

**Step 3.** Select the report parameters - in the example below a date range has been selected.

**Step 4.** **Submit** and **Execute** the report.

Load Group	Identifier	Condition	Catalog	Manager	Steward	Custodian	User	Location
BCN-120314175537	0	0	0	0	0	0	1	1
BCN-120320064944	2	0	0	0	0	0	1	1
BCN-120327163110	3	3	0	0	3	3	0	3
BCN-120409113910	0	0	0	0	0	0	1	0
BCN-120409114515	0	0	2	0	0	0	0	0
BCN-120409122152	1	0	0	0	0	0	0	0
BCN-120411084443	0	0	1	0	0	0	0	1
BCN-120411090549	1	0	0	0	0	0	0	0

The report displays a summary of the number of assets given various updates, such as Catalog, Steward, Custodian, User or Location updates. This example shows several Load Groups within the date range selected.