

## What's New with Sunflower CD-52 Retirement Functionality?

August 2013

### Request Retirement

1. **Users are limited to placing assets from one Custodial Area on one request.**  
If a PC is assigned to more than one Custodial Area and has assets from both Custodial Areas to retire, *two separate requests* must be made, one for each Custodial Area.
2. **Final Event Types are limited based on the Interest Type (Inventory, Agreement, Excess) selected.**  
This functionality mirrors standard Sunflower functionality, where certain Final Events are not valid for certain Interest Types.
3. **Each request is limited to one Interest Type (Inventory, Agreement, Excess).**  
If users need to request retirement for multiple Interest Types, (such as Inventory and Agreement,) then *two separate requests* must be made, one for each Interest Type.
4. **Drafts of retirement requests can be saved and assets can be added or removed before officially submitting a request.**  
Users can save a draft of a retirement request without submitting, and return to the request to add or remove assets or update other information, such as user defined fields, (UDFs). Once the requests are submitted, however, users' ability to update the information on the request is limited.
  - a. Requests created *but not officially submitted* will be purged from the system every 30 days.
  - b. When drafts are saved, users will receive an email notification as a reminder to submit, and to provide the Request Number in case it was forgotten.
5. **Once a draft request is "Saved", users then have to "Submit Request".**  
Because users can now "save" a draft of a request and return to it to add or remove assets (see #4 above), to complete the request process users must now use a "Submit Request" button to officially submit the request. Once this button is used the request will effectively be locked for the requestor, and the next approver in line will then be able to approve the request.
6. **The Document Number is now called Request Number.**  
The Document Number, which is generated upon saving a retirement request and placed on the printed CD52, is now called Request Number.

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### Approve /Deny / Withdraw Retirement Requests

1. **Approvers can now approve or deny retirement for multiple assets at once; or withdraw individual assets from requests.**

Rather than having to separately approve or deny retirement for each request (i.e., each asset), Approvers will now be able to approve or deny *all* assets on a request, or withdraw individual assets. Once approved and saved, every asset on a request will be retired (or the request will be closed as *Denied* if the request is denied). Any individual assets that are withdrawn will show the request as being closed as *Withdrawn*.

- If all assets on a request are withdrawn, then the entire request will be closed as *Withdrawn*.

2. **Approvers can query requests by Request Number or by the Barcode Number of one of the assets on the request.**

If an approver queries by the Barcode Number of one of the assets on the request, the query will show the request with all the assets on it.

3. The existing **Assets with Final Event Requests** report will be updated with new parameters and new information being displayed on the report. New parameters to run the report by include **Request Number** and **Final Event Type**. The report will also now show:

- a. The PAO
- b. The date a request was closed (approved, denied, overridden, expired or withdrawn)
- c. The Approval Status, which will indicate either who is next in line to approve the request or will show request as closed, withdrawn, etc.
- d. The date an approver acted upon a request