



# INVENTORY ASSETS

**T**he *Inventory Assets* chapter discusses the asset management processes that make up the day-to-day management of inventory assets. The discussion emphasizes those procedures that are used to manage and report on inventory assets from creation to retirement.

## KEY CONCEPTS

This chapter includes the following discussion points and concepts:

- About Inventory Assets
- Inventory Asset Roles
- Create Inventory Assets
- Maintain Inventory Assets
- Using the Inactive Module
- Using the Excess Module
- Retire Inventory Assets
- Management Reports

## ABOUT INVENTORY ASSETS

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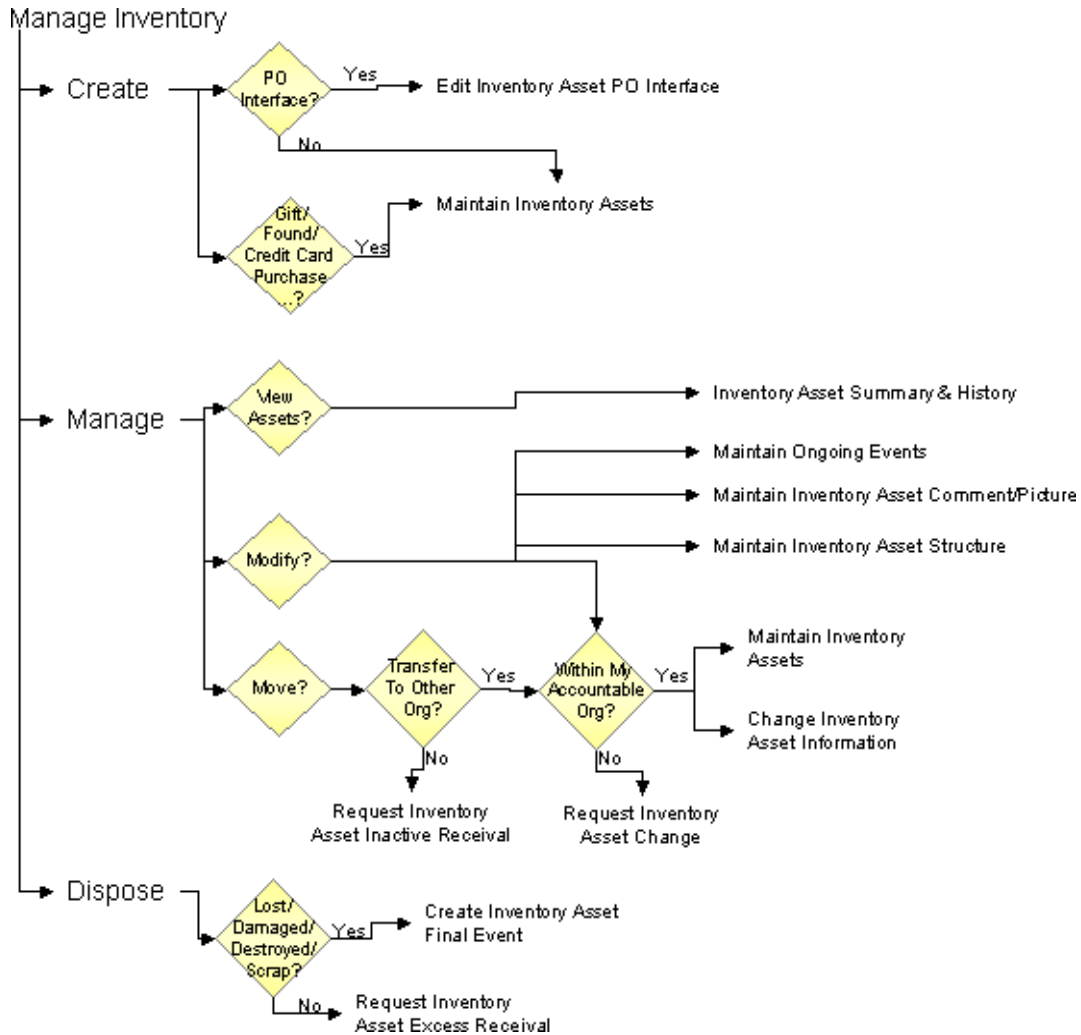
One of the primary tasks of asset management is the creation and maintenance of asset records, commonly referred to as inventory assets. From creation, to the retirement of an inventory asset, Sunflower Assets enables the ability to manage and oversee the organization's vast and diverse asset base.

Sunflower Assets provides the ability to monitor information about inventory assets and to create insightful reports that can be used to identify those assets requiring upgrades, maintenance or under utilization by an organization.

This chapter provides an examination of the different methods Sunflower Assets provides to capture information about inventory assets throughout the asset's lifecycle.

## INVENTORY ASSET MANAGEMENT WORKFLOW

The Management (MGMT) module handles three primary functions: creation, management and disposal of inventory assets. The workflow diagram below depicts these functions based on the menu items found within the Management module.



## INVENTORY ASSET ROLES

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

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

Sunflower's management roles include Inventory Managers, Inventory Clerks and Asset Center Representative (ACR). Depending upon the organizational structure, in a small, or centralized organization most of the users may be assigned as Inventory Managers responsible for performing all or many of the tasks related to asset management with a small number of users assigned as Inventory Clerks or Asset Center Representatives to carry out the daily business process.

For more information about Sunflower application roles, see Chapter 17, Roles.



## MANAGEMENT MENU ACCESS

The Management module uses three roles to manage inventory assets. These three roles are the **Inventory Manager**, **Inventory Clerk**, and **Asset Center Representative (ACR)**.

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

Menu Item	Role		
	Inventory Manager	Inventory Clerk	Asset Center Representative (ACR)
<b>Maintain Inventory Assets</b>	Yes	Yes	--
<b>Inventory Asset Summary and History</b>	Yes	Yes	Yes
<b>Manage Material</b>	Yes	Yes	--
<b>Asset Search</b>	Yes	Yes	Yes
<b>Material Search</b>	Yes	Yes	Yes
<b>Maintain Catalog Entries</b>	--	--	--
<b>Transfer Inventory Asset Value</b>	Yes	Yes	--
<b>Maintain Inventory Asset Ongoing Events</b>	Yes	Yes	Yes
<b>Create Inventory Asset Final Events</b>	Yes	Yes	--
<b>Edit Inventory Asset Interface Records</b>	Yes	Yes	--
<b>Edit Material Asset Interface Records</b>	Yes	Yes	--
<b>Edit Asset Structure Interface Records</b>	Yes	Yes	--
<b>Edit Container/Shipment Interface Records</b>	Yes	Yes	--
<b>Process Inventory Asset Interface Records</b>	Yes	Yes	--
<b>Process Inventory Asset PO Interface Records</b>	Yes	Yes	--
<b>Edit Asset Value Component Interface Records</b>	Yes	Yes	--
<b>Change Inventory Asset Information</b>	Yes	Yes	Yes
<b>Request Inventory Asset Change</b>	--	Yes	Yes
<b>Close Inventory Asset Requests</b>	Yes	Yes	Yes
<b>Maintain Inventory Asset User Fields</b>	Yes	Yes	Yes
<b>Maintain Inventory Asset Comment/Picture</b>	Yes	Yes	Yes
<b>Maintain Asset Structures</b>	Yes	Yes	Yes
<b>Search Map</b>	Yes	Yes	Yes
<b>Management Reports</b>	Yes	Yes	Yes

\*Inventory Clerks and Managers have access to the **Maintain Catalog Entries** screen if assigned the AS\_CATALOGER role.

## CREATE INVENTORY ASSETS

As a member of the property management team, one of the primary responsibilities is the creation of property records or inventory assets. Sunflower provides several methods to create inventory assets. Whether creating a simple asset from scratch, a composite asset from multiple purchase orders, or creating multiple inventory assets at once from a single purchase order line, Sunflower enables users to complete these and similar transactions with the Management module.

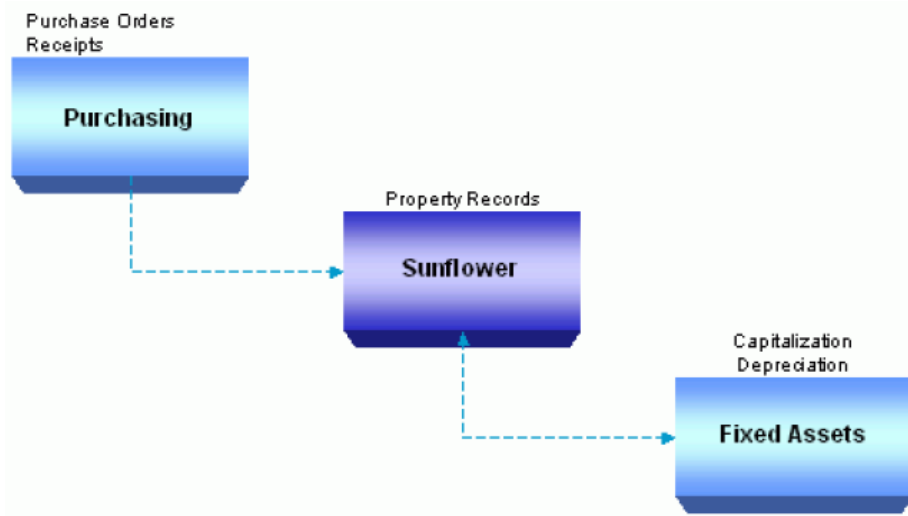
NOTE: If the Sunflower Sentry product is used to checkout assets from a **Check-In-Out Point**, assets will need to be assigned to those steward organizations and locations that make up Check-In-Out Points. For more information about creating Check-In-Out Points, see the Sentry Administration chapter in the The Sunflower Enterprise Administration Guide.

Users can either use an interface to import legacy data that designates the assets property characteristics such as steward organization and location, or this information can be assigned to the assets using the **Maintain Inventory Assets** screen. To establish inventory assets, follow the business requirements and policies as a guideline for creating asset records.

This section discusses the following topics:

- Single Asset Creation
- Mass Asset Creation
- Release and Accept New Assets

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



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

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

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

A Property Manager will determine which PO lines make up an asset. In order to capitalize the newly created asset, capital asset details should be reflected in the Sunflower Assets Finance module or a third party financial system via a real-time process interface. Alternatively, inventory asset records can be created from scratch in the Management module.

## SINGLE ASSET CREATION

Sunflower Assets simplifies the process of creating and maintaining assets. Asset management professionals will often find the need to add individual assets to the property management system of record. Sunflower Assets provides several screens and interfaces that simplifies the process of adding individual assets with or without purchase order information, updating asset information and transferring assets to and from the organization.

This section discusses how to create a single asset record using the following two methods:

- Create Assets Using the Maintain Inventory Assets Screen
- Create Assets Using the PO Interface Feature

### CREATE ASSETS USING THE MAINTAIN INVENTORY ASSETS SCREEN

The **Maintain Inventory Assets** screen is an integral feature in Sunflower Assets that will be used frequently in the day-to-day management of inventory assets. The **Maintain Inventory Assets** screen can be used to create or update asset records. For example, it could be used to track assets that the organization fabricates for custom applications. These assets were not purchased so there is no purchase order information to refer to when creating the asset records for the newly fabricated items. The **Maintain Inventory Assets** screen can be used to create asset records for the fabricated items.

In addition, the **Maintain Inventory Assets** screen enables users to update the descriptive information (e.g. **Location**, **Custodian**, and **Asset Condition**) for an inventory asset, as well as create catalog entries, or add a comment or picture.

Use the **Maintain Inventory Assets** screen to:

- Create Assets
- Modify Asset Details (e.g. custodian and location changes)

NOTE: Use the **Maintain Inventory Assets** screen for the assets to be managed with the Sunflower Sentry product by mapping the asset's steward and location information to the designated Check-In-Out Point. The steward in this case is the organization previously used to define the Check-In-Out Point.

Scenario: The following graphic illustrates how to create an asset

#### NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets

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

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

**NOTE:** In order for Sunflower to autogenerate a sequential number, enter the meta character (default is '.') then press the Tab key.

**Step 3.** Optionally, in order to track the asset record by a UUI, then place the cursor in the **Identifier** field and scan the UUI using a wedge scanner and press Tab. The **Capture UUI** window will appear. To save the UUI, press **Capture**.

Mark Value

Asset UII Type

Issuing Agency Code

Mark

Additional Elements

Additional Attributes

Medium

Mark Format

Symbology

EID Generated by

Generated by Others?

Bagged

Tagged

Generated for

Rendered?

Affixed?

Datetime

Identifier

Last Name

First Name

Mid

Search

Capture

Step 4. Enter the asset's information accordingly per the tables below.

Maintain Inventory Assets Field Terms

FIELD NAME	Description/Explanation
Identifier	Identifier assigned to an inventory asset (e.g. barcode, tag number, decal, or property identification number).
Type (Asset Identifier)	<p>The asset identifier Type assigned to the asset, (e.g. tageable, non-taggable, etc.). An example of how to use this feature is to indicate that an asset is being tracked but is not directly taggable. Organizations may have assets that would be impractical to try to affix a barcode or other type of identifier directly to the asset. By indicating that the asset is not directly taggable, staff can be alerted to look for the asset identifier in another logical location when indicating the asset is not taggable.</p> <p>Asset identifier types are maintained as Domains in the Administration module. Asset identifier types must be created before assigning them throughout the applica-tion.</p>
UII	This optional field allows organizations to capture an asset's UII identifier assigned by DOD and associate it to an inventory asset.

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## Maintain Inventory Assets Field Terms (Continued)

FIELD NAME	Description/Explanation
<b>Existing Interest Asset Type Identifier</b>	<p>Specifies the type of interest asset (e.g. inventory, agreement, inactive, excess etc.) Leave blank if this asset record does not exist in the systems as another interest asset type.</p> <p>For example, organizations may have an Inactive asset with its own Inactive Asset Identifier that users want to convert into an active Inventory asset. Users can reference an existing Inactive interest asset Type with its corresponding Inactive interest asset Identifier and Sunflower Assets will populate all of the corresponding information for that asset in the Maintain Inventory Assets fields.</p>
<b>Released?</b>	The default value is <b>N</b> . Upon saving, the value changes to <b>Y</b> to release the asset into ownership to the steward organization designated in the Steward field.
<b>Unique Name</b>	The Unique Name is a data set on items that is globally unique, unambiguous and robust enough to ensure that information is consistent through the life cycle of the asset and supports the multifaceted business applications and users.
<b>Default Location</b>	Specifies the default location for an inventory asset. For assets that are frequently borrowed from a Check-In-Out Point, the Default Location specifies the asset's location when it is not loaned out to a borrower.
<b>Copy to Location?</b>	Selecting this checkbox copies the value in the Default Location field to the Location field.
<b>Catalog Identifier</b>	The Catalog Identifier field automatically populates upon specifying the designated Manufacturer and Model Number combination. Alternatively, if the Catalog Identifier is known, users can enter the value here and the corresponding manufacturer and model number information is populated based on the Catalog Entry.
<b>Commodity Asset</b>	The Commodity Asset checkbox is marked if the asset is designated as an asset using the Commodity button at the bottom of this page.
<b>Material</b>	The Material asset checkbox is marked if the asset is designated as stock material that can be tracked using the Manage Material function.
<b>Parents</b>	<p>The Parents field displays the number of parent records for the current asset record that is being viewed. If an asset has a parent asset association, the number of associations displays in the Parents field. An asset can have multiple parents.</p> <p>Double click in the Parents field to view the detail parent record information on the Maintain Asset Structures screen where the parent record information can be viewed for the selected asset.</p>
<b>Children</b>	<p>The Children field displays the number of child records for the current asset record being viewed. If an asset has a child asset association, the number of associations displays in the Children field. An asset can have multiple children.</p> <p>Double click in the Children field to view the detail child record information on the Maintain Asset Structures screen where users can view the child record information for the selected asset.</p>
<b>C/A/P</b>	The C/A/P field indicates if there is a comment <b>C</b> , attachment <b>A</b> , or picture <b>P</b> attached to the selected inventory asset record.
<b>Manufacturer</b>	Double-click to select from the list of values a valid manufacturer name. If the value that is being looked for does not appear in the list of values, use the Administration module to add the new Manufacturer name to the list of valid Organizations. For more information about adding manufacturers, see the People and Organization chapter of the Sunflower Enterprise Administration Guide.
<b>Model Number</b>	Double-click to select from the list of values. If the value being looked for does not appear in the list of values, use the Management module Maintain Catalog Entries screen to add the corresponding manufacturer and model number combination.

## Maintain Inventory Assets Field Terms (Continued)

FIELD NAME	Description/Explanation
<b>Official Name</b>	The Official Name field automatically populates upon specifying the Manufacturer and Model Number. Create Official Names for Manufacturer and Model combinations by using the Maintain Catalog Entries screen. For example, the Apple computer in this example is assigned as a Computer-Personal. The Official Name could be changed to PC, Desktop, Laptop etc.
<b>Serial Number</b>	Enter the serial number for the asset. If there is no serial number for the asset, leave blank.
<b>Drawing No</b>	Enter the drawing number used to design and construct the asset. Generally used for architectural and construction projects.
<b>Initial Event</b>	Double-click to select from the list of values. This field can be extended to capture the business practice specific information. Asset Initial Events are maintained as Domains in the Administration module. Asset initial events must be set up before assigning them throughout the application.
<b>User Fields</b>	Double-Click to open up this complex field for data entry. In this case, the User Field captures the context based information for a <a href="#">Purchase</a> Initial Event has been extended to capture the Purchase Order, Purchase Order Line and Purchase Account information from a PO. Leave Blank if there is no corresponding PO information for the corresponding initial event. The user fields specific to the screens and interest assets can be defined. User fields enable users to personalize the application to provide additional information that is not available when using the standard application.
<b>Asset Value</b>	<p>Double-click to open the Asset Value Components block and specify the asset value components.</p> <p>Asset Value Types are Domains that are specified in the Administration module. Define these types based on the organization's business practices. The value components of an asset can be comprised of several different activities (e.g. acquisition cost, shipping, site preparation, installation, upgrades etc.).</p> <p>Enter the cost of the asset. Do not enter \$, commas, or.00. 1500 is the same as \$1,500.00.</p> <p>The Administration module can be used to extend the Asset Value Component user defined field (User Fields) to accommodate business practices.</p> <p>The <b>Cap?</b> (Capitalize?) field indicates if an asset is capitalized. An asset can be capitalized with the Finance module using the Capitalize Financial Assets screen. It is a display only field on this screen.</p>
<b>Acquisition Date</b>	Enter the date the asset was purchased. MM/DD/YYYY format. Double-click to use the Calendar function to select the date from Calendar pop-up window.
<b>Responsibility Date</b>	Enter the date in which the organization took ownership of the asset. MM/DD/YYYY format. Double-click to use the Calendar function to select the date from Calendar pop-up window.
<b>Asset Condition</b>	<p>Used to specify the current working quality of the property. Select from the list of values the appropriate condition of the asset.</p> <p>If the appropriate selection can be found, create the value in the Administration module by using the Maintain Asset Conditions screen.</p> <p>For more information about Asset Conditions, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.</p>
<b>Effective Date</b>	The date that the asset becomes active in the Sunflower Assets database. MM/DD/YYYY format. Double-click to use the Calendar function to select the date from Calendar pop-up window.



## Maintain Inventory Assets Field Terms (Continued)

FIELD NAME	Description/Explanation
<b>Expected Return Date</b>	When loaning property, enter the date that the property is expected to return. MM/DD/YYYY format. Double-click to use the Calendar function to select the date from Calendar pop-up window.
<b>Activity Status</b>	Used to specify the current state of the property. (e.g. In Service, Inactive, etc.) Activity statuses can be added using the Administration module Maintain Activity Statuses screen. For more information about Activity Statuses, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.
<b>Flags</b>	Double-click to open the Asset Flag complex field to specify special conditions for the asset. (e.g. sensitive, hazardous etc.) Leave blank if there are no special conditions to apply to the asset. In this case, the computer has been marked as sensitive. Although the computer itself may be benign, the data residing on the computer hard drive may be of a sensitive nature. To add asset flags, use the Administration module Define Asset Flags screen. (Other typical flags might be Flammable, Keep Dry, Corrosive, etc.) For more information about Asset Flags, see the User Extensibility chapter of the Sunflower Enterprise Administration Guide.
<b>Activity Type</b>	Enter the Activity Type for the asset. For example, if assets are needed for use on various research projects. Update the Activity Type field to reflect the project that is currently using the asset. For more information about Activity Types, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.
<b>Manager</b>	Specify the managing organization of the asset. Create managers by using the Administration module Maintain Organizations screen and assigning the organization as a <a href="#">Manager</a> organization structure.
<b>Owner</b>	Specify the owning organization of the asset. Create owners by using the Administration module Maintain Organizations screen and assigning the organization as an <a href="#">Owner</a> organization structure.
<b>Steward</b>	Specify the steward of the asset. Create stewards by using the Administration module Maintain Organizations screen and assigning the organization as a <a href="#">Steward</a> organization structure.
<b>Accepted?</b>	Specifies if an asset has been accepted by the steward organization. The default value is <a href="#">Y</a> (Yes).
<b>Rep</b>	The name of the Steward's primary ACR (Asset Center Representative).
<b>Custodian</b>	Specify the custodian of the asset. Select a Custodian by either their Last Name, First Name or Identifier. A Custodian identifier can be an employee ID or badge number that is unique to that individual.
<b>User</b>	Specify a specific user of the asset if applicable. Select a User by either their Last Name, First Name or Identifier. A User identifier can be an employee ID or badge number that is unique to that individual.
<b>Location</b>	Double-click to open the Location complex field and assign the asset location accordingly. Create locations using the Administration module Maintain Locations screen and its supporting maintenance screens to capture the organization's set of locations. For more information about setting up locations, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.

### Maintain Inventory Assets Field Terms (Continued)

FIELD NAME	Description/Explanation
<b>Document</b>	Enter the related asset Document information such as type of supporting documentation, documentation identifier, storage type and organization for an asset. Use the Administration module Maintain Domains screen to create and edit the Document Type and Document Storage Type domains to fit business practices. For more information about defining up document types, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.
<b>User Fields</b>	User Defined Fields (UDFs) data entry is based upon business practices/needs. User fields enable personalization of the application so that users can provide additional information that is not available when using the standard application. In this example, the UDF is a context free extension of the Inventory Asset State. The asset weight can be provided in this case.
<b>Global User Fields</b>	Global User Defined Fields (UDFs) data entry is also based upon business practices/needs. Global user field information is applicable to all interest asset states. This field is tied the Asset State. In this example, the UDF is a context based extension of the Asset State which is tied to the Catalog Entry Asset Type information for this asset.
<b>Add'l Information (Page 2)</b>	Click to display the pop-up window for Page 2 which contains the Catalog Entry information for this asset.
<b>Commodity</b>	Use the Commodity button to assign the Commodity/Material information.
<b>Comment/Picture/Attachment</b>	Click to open the Comments, Attachments and Pictures screen. Add any supporting comments, attachments or pictures for the asset.
<b>Re-Request</b>	Use the Re-Request button to create a new request to transfer the displayed asset if the prior request was denied.
<b>Configuration</b>	Use the Configuration button to create an asset configuration for the item. Note that this button will not be enabled unless user has proper configuration roles.
<b>Kit</b>	Use the Kit button to create an asset kit for the item. Note that this button will not be enabled unless user has proper kit roles

[Step 5](#). Click on the **Add'l Information** button to complete the additional fields per the descriptions below:

### Maintain Inventory Assets Additional Information (Page 2) Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
<b>Asset Type</b>	Displays the Asset Type assigned to this asset's catalog entry. Display only.
<b>Federal Supply Classification</b>	Displays the assigned Federal Supply Classification Group Number, Class Number, National Identification Number and long name for the asset. Display only. For more information about FSC codes, see the Domains and Documents chapter of the Sunflower Enterprise Administration Guide.
<b>Stock Number</b>	Specifies the assets internal stock number or identification. Display Only
<b>Service Life</b>	The assigned catalog entry service life (in years) for the specified asset type. Display only.
<b>Override:</b>	Use the Override Service Life field to enter an override value for the asset's service life.
<b>Salvage Value %</b>	The assigned catalog entry Salvage Value % for the specified asset type. Display only.
<b>Override:</b>	Use the Override Salvage Value % field to enter an override value for the asset's Salvage Value %. Enter a value between 1 and 100.

### Maintain Inventory Assets Additional Information (Page 2) Field Terms (Continued)

FIELD NAME	DESCRIPTION/EXPLANATION
<b>Replacement Value Override:</b>	The assigned catalog entry replacement value for the specified asset type. Display only. Use the Override Replacement Value field to enter an override value for the asset's replacement value.
<b>Expiration Date</b>	Users must specify an expiration date for perishable assets that have a shelf life. This field is required when the Shelf Life? Indicator is Y and the Extendible? Indicator is N.
<b>Shelf Life? Indicator</b>	Indicates whether an item requires an Expiration Date. This field is maintained on the Catalog.
<b>Inspection Due</b>	Users must enter an inspection due date for assets with an extendible shelf life. This field is required when the Shelf Life? Indicator is Y and the Extendible? Indicator is Y.
<b>Extendible? Indicator</b>	Indicates whether an item has an extendible shelf life and requires an Inspection Date. This field is maintained on the Catalog.

Step 6. Click the **Save** icon to close the **Add'l Information** window

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

#### Example:

•Click

## CREATE INVENTORY ASSETS

NOTE: To checkout assets with the Sunflower Sentry application, assets must be assigned authorized stewards and locations. These stewards and locations combinations map to designated Check-In-Out Points that are established with the Maintain Organization screen. For more information about establishing Check-In-Out Points, see the Sunflower Enterprise Administration Guide, Sentry Administration chapter.

**Step 8.** Click the **Summary and History** button on the toolbar to view the history record of the item

**Example:**

The screenshot displays the 'Inventory Asset Summary and History' window for asset 301. The window is titled 'Inventory Asset Summary and History - asmn2055 (Page 1 of 2)'. It features a top section for asset details and a main section for the timeline.

**Asset Details:**

- Assets: Identifier **301**, Identifier Type, Parents **0**, Children **0**, C/A/P, Current Identifier **301**
- Unique Name
- Default Location\* **View Map**

**Timeline Section:**

- Timeline** (selected) | Details
- UI: **None Captured**
- Other Identifiers: **INV / 301**
- Sort By: 1 **DATETIME DESC**, 2 **DATETIME DESC**, 3 **DATETIME DESC**
- Get Records**

**Timeline Table:**

Datetime	Category	Description	Attributes	Document?
12/11/2012 07:18:06	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST_2746_0	
12/11/2012 07:18:06	INITIAL EVENT	(INV 301) PURCHASE	123	

**Timeline Report** **Record Properties**

## CREATE ASSETS USING THE PO INTERFACE FEATURE

Use the Sunflower Assets PO Interface feature to create assets from PO information received from a purchasing system feed into the Sunflower application database. The PO Interface feature enables users to create one or more assets based on a single PO line item or create a single composite asset based on several PO line items from multiple purchase orders. For more information on using the PO Interface, see the **PO Interface Chapter** of this guide.

MASS ASSET CREATION

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

- Maintain Inventory Assets - Duplication
- PO Interface - Duplication

MAINTAIN INVENTORY ASSETS - DUPLICATION

If there are several assets of the same type (e.g. 20 Dell Inspiron 1150 Laptops) that are needed to create manually, use the **Maintain Inventory Assets - Duplication** feature to create new asset records based on a previous or newly created asset record. Supply each duplicated asset record with a unique asset **Identifier** and **Serial Number** and verify that the remaining information for each duplicate asset is accurate.

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

- NAVIGATION
- Click Mgmt
  - Click Maintain Inventory Assets

•Click

## CREATE INVENTORY ASSETS

**Step 1.** From the **Maintain Inventory Assets** screen, open the record to be duplicated.

**Step 2.** Click F4 or Ctrl + F6 to duplicate an asset or from the **Functions** menu, select **Record**, then **Duplicate**.

NOTE: Notice that **Duplicate Record** appears at the top of the screen.

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets Duplicate Record

UII None Captured

Other Identifiers (0)

Identifier\* 301 Type Existing interest asset Type Identifier Released? Y

Unique Name

Default Location\*

Catalog Identifier\* 2

Manufacturer DELL

Official Name COMPUTER, TABLET

Serial Number 38497JAOUR

Initial Event PURCHASE

Asset Value\* \$2,746.00

Asset Condition 1 UNUSED - GOOD

Activity Status IN SERVICE

Manager SUNFLOWER SYSTEMS

Steward ASSET CENTER 01

Custodian NAARON Last Name\* AARON

User 44A409 Last Name\* ANDERSON

Location\* ARLINGTON, VA, BUILDING\_1\_ROOM\_A

Document\* PURCHASE ORDER\_123

User Fields\* WARRANTY INCLUDED

Global User Fields\*

Flags\* S

Activity Type

Owner SUNFLOWER SYSTEMS

Rep

First NOAH Mid

First JOE Mid

Accepted? Y

Copy to Location? ☒

Parents Children C/A/P

Model D333

Model Name

Drawing No.

User Fields\* 123

Acquisition Date 12/01/2012 Responsibility Date 12/11/2012

Effective Date 12/11/2012 Expected Return Date

Add Information Commodity Comment / Picture / Attachment Re-Request Asset Configuration Asset Kit

**Step 3.** Enter a new **Identifier** for the duplicate asset.

**Step 4.** Enter a new **Serial Number**.

**Step 5.** Verify or update the remaining information.

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

PO INTERFACE - DUPLICATION

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

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

NAVIGATION

- Click Mgmt
- Click Process Inventory Asset PO Interface Records
- Click Next Block to Page 3
- Click Number in Duplicate field
- Click Times button

Enter the number of duplicate assets to create in the **Duplicate** field. Press the **Times** button to add the new assets in the **Assets** block where they are assigned incremental asset identifiers or a **Tag Needed** indicator. Verify that each asset has been assigned a valid asset identifier. Modify the details of each asset before saving. When using an alphanumeric value asset identifier, any number of initial alpha characters terminated by a numeric value of one or more digits increments the numeric portion of the asset identifier and is assigned to each duplicate asset.



## RELEASE AND ACCEPT NEW ASSETS

If organizations want to allow individuals to review and accept asset records prior to being officially recorded in the organizations inventory, they may use the Release and Accept feature. This feature enables control over the automatic release of assets into the organization at the time of creation. The factory setting of this function is set to **Y** to enable clerks and managers to create and release assets to the organization automatically. In order to require an inventory manager to review and release assets into the organization, set the parameter value from **Y** to **N** using the **ASSETS-MANAGEMENT-AUTOACCEPT** parameter in the **Enter Registered Application Values** screen. Once entered, an inventory manager must update the Released? field from **N** to **Y** in order to accept the asset into the organization.

Scenario: The following example guides users through the steps for releasing a new inventory asset.

### NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets

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

**Step 2.** Enter a new asset identifier that requires release in the **Identifier** field.

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

**Step 3.** Validate the information entered on the item.

- For more information, see "Maintain Inventory Assets Field Terms" on page 10.

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

Maintain Inventory Assets - asmin2010 (Page 1 of 2)

Inventory Assets

Other Identifiers (1) INV / 302

Identifier 302 Type Existing interest asset Type Identifier Released? N

Unique Name

Default Location\*

Catalog Identifier\* 2

Manufacturer DELL

Official Name COMPUTER, TABLET

Serial Number ALFJEIORJ

Initial Event PURCHASE

Asset Value\* \$2,349.00

Asset Condition 1 UNUSED - GOOD

Activity Status IN SERVICE

Manager SUNFLOWER SYSTEMS

Steward ASSET CENTER 01

Custodian NAARON

User 44A409

Location\* ARLINGTON, VA\_BUILDING\_1\_ROOM\_A

Document\*

User Fields\*

Global User Fields\*

Commodity Asset

Material

Parents

Children

C/A/P

Model D333

Model Name

Drawing No.

User Fields\* 345

Acquisition Date 12/01/2012

Responsibility Date 12/01/2012

Effective Date 12/11/2012

Expected Return Date

Flags\*

Activity Type

Owner SUNFLOWER SYSTEMS

Rep

First NOAH

Mid

First JOE

Mid

Accepted?

Buttons: Add Information, Cancel, Commit/Default/Attachment, Do Default, Test Configuration, Test 12

Step 4. To release a new inventory asset to a steward, change the **Released** indicator from **N** to **Y**.

Step 5. Press the **Save** icon to save the changes

Example:

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

Other Identifiers (1) INV / 302

Released? ☒

Identifier 302

Type Existing interest asset

Unique Name

Default Location\*

Catalog Identifier\* 2

Manufacturer DELL

Official Name COMPUTER, TABLET

Serial Number ALFJEIORJ

Initial Event PURCHASE

Asset Value\* \$2,349.00

Asset Condition 1 UNUSED - GOOD

Activity Status IN SERVICE

Manager SUNFLOWER SYSTEMS

Steward ASSET CENTER 01

Custodian NAARON

User 44A409

Location\* ARLINGTON, VA, BUILDING\_1\_ROOM\_A

Document\*

User Fields\*

Global User Fields\*

Commodity Asset

Material

Parents 0 Children 0 C/A/P

Model D333

Model Name

Drawing No.

User Fields\* 345

Acquisition Date 12/01/2012

Effective Date 12/11/2012

Responsibility Date 12/01/2012

Expected Return Date

Flags\*

Activity Type

Owner SUNFLOWER SYSTEMS

Rep

Accepted? N

First NOAH

Mid

First JOE

Mid

Add Information

Commodity

Comment / Picture / Attachment

Re-Request

Asset Configuration

Asset Kit

Step 6. Press the **Summary and History** button on the toolbar to review the timeline of the item

Example:

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets

Identifier: 302

Identifier Type:

Parents: 0

Children: 0

C/A/P:

Current Identifier: 302

Unique Name:

Default Location\*: 

View Map

Timeline

Details

☒ Include Events

☒ Include Resolutions

☒ Include Contract Reports

☒ Include Meter Readings

☒ Include Open Requests

☒ Include Closed Requests

☒ Include IUID/WAWF

☒ Include Configuration and Kitting

Other Identifiers: INV / 302

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

Get Records

Datetime	Category	Description	Attributes	Document?
12/11/2012 07:29:13	OPEN REQUEST	INVENTORY ASSET ACCEPT	ASSET CENTER 01	<div></div>
12/11/2012 07:27:00	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST __2349__0	<div></div>
12/11/2012 07:27:00	INITIAL EVENT	(INV 302) PURCHASE	345	<div></div>
				<div></div>
				<div></div>
				<div></div>
				<div></div>
				<div></div>
				<div></div>

Timeline Report

Record Properties

NOTE: A request for acceptance has been generated for the accepting steward organization that must be accepted through the Close Inventory Asset Request Form. See section under Maintain Inventory Assets for guidance on the form.

## MAINTAIN INVENTORY ASSETS

The Management module facilitates the detailed tracking of the relationships between assets, organizations and people as they change over time. After acquiring assets, these assets will need to be assigned a location, a responsible party and organization for each asset. Sunflower enables the user to maintain inventory assets by using several Management module screens to update the attributes of the inventory assets. Complimenting the **Maintain Inventory Assets** screen are the supporting Management module screens that enable the day-to-day management of the inventory assets. The **Maintain Inventory Asset Comment/Picture** screen provides the ability to attach supporting documentation, comments and pictures.

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

The **Change Inventory Assets Information** screen enables users to make simultaneous mass updates to multiple assets within the organization. Additionally, there are administration features such as the **Edit Inventory Asset User Fields** screen, that extend the existing functionality of the Management module screens to match business practices. Another useful Management module feature is the **Maintain Asset Structure** screen that can be used to manage Parent/Child asset structures. Finally, the Management module reports enable the viewing of details and history of inventory assets.

The following section illustrates several common management tasks that can be performed with the Management module.

- View Inventory Asset Details
- Edit Inventory Asset Records
- Edit Comments, Attachments and Pictures
- Maintain Asset Structures (Parent/Child Relationships)
- Transfer Assets
- Transfer Inventory Asset Value
- Maintain Inventory Asset Ongoing Events
- Maintain Inventory Asset User Fields

VIEW INVENTORY ASSET DETAILS

The **Asset Summary and History** screen is one of the most widely used screens in Sunflower Assets. The **Asset Summary and History** screens provide a view of the current and historical information of assets based on a specific interest asset (e.g. Agreement, Management, Finance, Inactive, and Excess). Use this screen to perform a quick search of current and historical information for a single asset or a group of assets. The **Inventory Asset Summary and History** screen provides a read-only view of any inventory asset record available within the system. Sunflower records the history of every change made to an asset.

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

- NAVIGATION
- Click Mgmt
  - Click Inventory Asset Summary and History

Datetime	Category	Description	Attributes	Document?

- Step 1. Navigate to the **Inventory Asset Summary and History** screen.
- Step 2. Select the **Include History** checkbox.
- Step 3. Enter the asset identifier in the **Identifier** field and press the tab key to display the summary page for the asset record.

Example:

NOTE: To view the history for multiple assets, Press the **Find** icon on the toolbar to navigate to the **Query Criteria** screen. Enter the search criteria and press the **Execute** button. Scroll up and down to observe the changes to the asset. The latest information displays as the current record reflecting the changes.

- Step 4. Click the **Details** icon adjacent to an attribute field on the **Inventory Asset Summary and History** screen to view the details of that attribute. For example, click the **Details** icon next to the **Manufacturer** field to display the **Maintain Organization** screen in display only mode.
- Step 5. Click the closeout box (X) to exit out of the **Maintain Organization** screen and return to the **Asset Summary and History** screen.
- Step 6. Click the **Timeline** tab to view the selected asset event, resolutions and requests history.

REVIEW THE ASSET EVENT HISTORY

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

Inventory Asset Summary and History- asmin2055 (Page 1 of 2)

Assets

Identifier 302

Identifier Type

Parents 0

Children 0

C/A/P

Current Identifier 302

Unique Name

Default Location\*

View Map

Timeline

Details

☒ Include Events

☒ Include Resolutions

☒ Include Contract Reports

☒ Include Meter Readings

☒ Include Open Requests

☒ Include Closed Requests

☒ Include IUID/WAWF

☒ Include Configuration and Kitting

Other Identifiers INV / 302

Sort By

1 DATETIME DESC

2 DATETIME DESC

3 DATETIME DESC

Get Records

Datetime	Category	Description	Attributes	Document?
12/11/2012 07:36:02	ONGOING EVENT	INVENTORY ASSET ACCEPT		
12/11/2012 07:29:13	CLOSED REQUEST	INVENTORY ASSET ACCEPT	ASSET CENTER 01	
12/11/2012 07:27:00	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST_2349_0	
12/11/2012 07:27:00	INITIAL EVENT	(INV 302) PURCHASE	345	

Timeline Report

Record Properties

Step 7. Select asset events whose history should be reviewed from the following checkboxes:

NOTE: Each of these events is check by default but can be unchecked according to the needs of the user.

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



- **Include Resolutions**  
Resolutions are a method for verifying that an asset record is accurate during a review campaign (Physical Inventory). For example, a resolution could be the barcode scan of an asset during a review campaign.
- **Include Contract Reports**  
Lists contract reports generated for the selected asset.
- **Include Meter Readings**  
Lists meter readings recorded against the selected asset.
- **Include Open Requests**  
Open Requests reflect a transaction that is still awaiting a conclusion. For example, if a transfer of an asset to another custodian is requested and that custodian has not closed the request by either accepting or denying the request, the request remains open and will appear on the **Timeline** grid as such. The requestor of the transfer can close the request by withdrawing the request.
- **Include Closed Requests**  
Closed requests reflect a transaction that has been completed.
- **Include IUID/WAWF**  
Lists whether the selected asset has generated a virtual asset, asset mark, and upload to the IUID Registry.
- **Include Configuration and Kitting**  
Lists configuration and kitting related transactions against the select asset.

**Step 8.** Optionally, to change the order in which the events are displayed, update the **Sort By** fields.

**Step 9.** Click the **Get Records** button to execute the query.

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

**Step 10.** Click the **Details** icon adjacent to a selected event on the **Timeline** grid to look at the details of an event.

**Step 11.** Click the closeout box (X) to exit out of the details view and return to the **Timeline** tab.

**Step 12.** The **UII** field displays the UII generated for the selected asset. If a UII has not been generated, the field displays **None Captured**.

**Step 13.** The **Other Identifier** field displays any other identifiers associated with the selected asset. Click the **Details** icon adjacent to this field to open the **View Asset Unique Identifier** screen.

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

**Step 14.** Click the **Timeline Report** button to open the **Asset Timeline** report criteria page.

**Step 15.** Click the **Record Properties** button to open the **Record Properties** inspector window.

## ASSET SUMMARY AND HISTORY FIELD TERMS

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

### Asset Summary and History Field Terms

FIELD NAME	DESCRIPTION/EXPLANATION
<b>Identifier</b>	The asset identifier is a unique tracking number for the assigned inventory asset. For example, a barcode, tag number or property identification number.
<b>Identifier Type</b>	Displays the identifier type, (e.g. barcode, RFID, or PIN).
<b>Parents</b>	The Parents field displays the number of parent records for the current asset record that are being viewed. If an asset has a parent asset association, the number of associations displays in the Parents field. An asset can have multiple parents. Double click in the Parents field to view the parent record information on the Maintain Asset Structures screen.
<b>Children</b>	The Children field displays the number of child records for the current asset record that is being viewed. An asset can have multiple children. Double click in the Children field to view the child record information on the Maintain Asset Structures screen.
<b>C/A/P</b>	The C/A/P field indicates if there is a comment <b>C</b> , attachment <b>A</b> or picture <b>P</b> attached to the selected inventory asset record.
<b>Current Identifier</b>	Displays the tracking identifier assigned to the inventory asset when the historical record was current.
<b>Unique Name</b>	Displays the unique name assigned to the inventory asset. The Unique Name is a data set on items that is globally unique, unambiguous and robust enough to ensure that information is consistent through the life cycle of the asset and supports the multifaceted business applications and users.
<b>Default Location</b>	Specifies the default location for an inventory asset. For assets that are frequently borrowed from a Check-In-Out Point, the Default Location specifies the asset's location when it is not loaned out to a borrower.
<b>View Map</b>	The View Map button will open a visual representation of the asset if it has been assigned to a location using Asset Mapping.
<b>Include History</b>	When selecting the Include History checkbox, the screen returns current and historical records for the selected inventory asset.  To view the other records, click the Previous Record and Next Record icons on the Tool Bar. If Include History is not selected, the screen returns only the current record for the inventory asset.
<b>Next/Previous Record Indicator</b>	The field adjacent to the Include History checkbox indicates if there are multiple records for the selected inventory asset. A <b>v</b> indicates that the most current record for the asset is being displayed. Scroll through the earlier records of an asset by selecting the Next Record icon to view the history of that inventory asset. A <b>^ v</b> indicates that users can select either the Previous Record icon or Next Record icon to view the other records for the selected inventory asset. A <b>^</b> indicates that users are viewing the earliest record entry for the inventory asset and the user can only scroll back through the inventory asset records using the Previous Record icon.
<b>Manufacturer</b>	Displays the name of the manufacturer of the asset.
<b>Model</b>	Displays the model number assigned to the asset by the manufacturer.
<b>Official Name</b>	Displays the organization's official description for the asset by a particular manufacturer and model combination.
<b>Material Checkbox</b>	Displays whether or not an asset is material. If checked, the asset is material, if unchecked, the asset is not material.
<b>Model Name</b>	Displays the model name assigned to the asset by the manufacturer.

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

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

Asset Summary and History Field Terms (Continued)

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

## MAINTAIN INVENTORY ASSETS

Many changes can occur over the course of an asset's lifecycle. The most common changes are those that affect the location, custodian, user and steward of the asset. There are several ways to update property records in Sunflower. The best way to accomplish the task will be based on the type of changes required and the roles that the users possess. Sunflower provides the ability to update records one at a time or in groups. Depending upon the user roles and the type of change, the process to update the asset record may require two steps: first to request the change, and the second to approve it.

The following examples illustrate how to:

- Update one asset record at a time through Maintain Inventory Assets
- Update multiple assets through Change Inventory Asset Information
- Request an asset change
- Accept an asset change request
- Deny or withdraw a requested change

UPDATE SINGLE ASSET RECORD THROUGH MAINTAIN INVENTORY ASSETS

In addition to using the **Maintain Inventory Assets** screen to create asset records, use the **Maintain Inventory Assets** screen to update an asset record.

NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets

The screenshot shows the 'Maintain Inventory Assets' window. The title bar reads 'Maintain Inventory Assets - asmn2010 (Page 1 of 2)'. The form includes fields for 'Identifier\*', 'Unique Name', 'Default Location\*', 'Catalog Identifier\*', 'Manufacturer', 'Official Name', 'Serial Number', 'Initial Event', 'Asset Value\*', 'Asset Condition', 'Activity Status', 'Manager', 'Steward', 'Custodian', 'User', 'Location\*', 'Document\*', 'User Fields\*', and 'Global User Fields\*'. There are also checkboxes for 'Existing interest asset', 'Commodity Asset', 'Material', 'Released?', 'Copy to Location?', 'Accepted?', and 'Flags\*'. Date fields for 'Acquisition Date', 'Effective Date', 'Responsibility Date', and 'Expected Return Date' are present. A 'Parents' section includes 'Children' and 'C/A/P' checkboxes. A 'Model' section includes 'Model Name' and 'Drawing No.'. A 'User Fields\*' section includes 'First' and 'Mid' name fields. A toolbar at the bottom contains buttons: 'Add Information', 'Commodity', 'Comment / Picture / Attachment', 'Re-Request', 'Asset Configuration', and 'Asset Kit'.

- Step 1. Navigate to the **Maintain Inventory Assets** screen.
- Step 2. Enter the asset identifier in the **Identifier** field. Press tab.
- Step 3. Update the record as required.
- Step 4. Press the **Save** icon to save the changes.
- Step 5. Press the **Summary and History** button on the toolbar to validate the changes have been saved.

**Example:** Below is a sample timeline for a user and location change

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets

Identifier

Identifier Type

Parents

Children

C/A/P

Current Identifier

Unique Name

Default Location\*

View Map

Timeline

Details

☒ Include Events

☒ Include Open Requests

Other Identifiers

☒ Include Resolutions

☒ Include Closed Requests

Sort By 1

☒ Include Contract Reports

☒ Include IUID/WAWF

2

☒ Include Meter Readings

☒ Include Configuration and Kitting

3

Get Records

Datetime	Category	Description	Attributes	Document?
12/11/2012 07:50:38	ONGOING EVENT	CHANGE LOCATION	AUSTIN, TX_BUILDING_2	
12/11/2012 07:50:38	ONGOING EVENT	CHANGE USER	MANNION BRIAN BMANNION	
12/11/2012 07:36:02	ONGOING EVENT	INVENTORY ASSET ACCEPT		
12/11/2012 07:29:13	CLOSED REQUEST	INVENTORY ASSET ACCEPT	ASSET CENTER 01	
12/11/2012 07:27:00	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST_2349_0	
12/11/2012 07:27:00	INITIAL EVENT	(INV 302) PURCHASE	345	

Timeline Report

Record Properties



## UPDATE MULTIPLE ASSETS THROUGH CHANGE INVENTORY ASSET INFORMATION

Use the **Change Inventory Asset Information** screen to apply updates to multiple assets all at the same time. The following data elements may be changed on this screen: **Steward, Custodian, User, Activity Status, Expected Return Date, Condition, Location, and Document**. Depending upon a user's role, they may not be able to successfully change the asset record through this form. For example, if a user is a steward contact of one organization and tries to change the steward to an organization for which they are not a contact, they will receive an error that he/she doesn't have sufficient privilege.

### NAVIGATION

- Click Mgmt
- Click Change Inventory Asset Information

The screenshot shows the 'Change Inventory Asset Information' window. The 'New Information' section has checkboxes for Steward, Custodian, User, Activity Status, Asset Condition, Location\*, Document\*, and Comment, each with a corresponding text field. There are also fields for Rep (First, Mid), Expected Return Date (checkbox), and Effective Date (12/11/2012). The 'Assets' section features a 'Select All' button and a table with columns 'Ok', 'Identifier', and 'Manufacturer / Model / Official Name'. The first row of the table is highlighted. A 'Message' field is at the bottom.

- Step 1. Navigate to the **Change Inventory Asset Information** screen.
- Step 2. Select (check) the field(s) to be changed on the asset record(s).
- Step 3. Enter the new information or select from the list of values for the selected fields. The comment field can be entered free form.
- Step 4. Place the cursor in the **Identifier** field of the **Assets** block.
- Step 5. Click the **Find** button to use the **Query Criteria** screen to find and populate the assets to be updated or enter them manually.
- Step 6. Enable the **Delta** checkbox in front of the assets to update.

Step 7. Click the **Save** icon to save the changes to the selected assets.

Example:

The screenshot shows a software window titled "Change Inventory Asset Information - asmn2020". It is divided into two main sections: "New Information" and "Assets".

**New Information Section:**

- Steward:** A checkbox is present, but the field is empty.
- Custodian:** Checked. Fields for "First" (NAARON) and "Last Name\*" (AARON) are filled.
- User:** Checked. Fields for "First" (TBUCCI) and "Last Name\*" (BUCCI) are filled.
- Rep:** Fields for "First" (NOAH) and "Mid" (THOMAS) are filled.
- Activity Status:** A dropdown menu is open, showing "Expected Return Date" and "Effective Date" (12/11/2012).
- Asset Condition:** A dropdown menu is open.
- Location\*:** ARLINGTON, VA \_ BUILDING \_ 2
- Document\*:** CUSTODIAN RECEIPT \_ 0000000201
- Comment:** An empty text field.

**Assets Section:**

- A "Select All" button is at the top left.
- A table lists assets with columns: "Ok", "Identifier", and "Manufacturer / Model / Official Name".
- Assets listed: 1 (TOSHIBA \_ T3100 \_ TELEVISION), 2 (DELL \_ D333 \_ COMPUTER, TABLET), 3 (DELL \_ D333 \_ COMPUTER, TABLET), 301 (DELL \_ D333 \_ COMPUTER, TABLET), and 506 (DELL \_ D333 \_ COMPUTER, TABLET).
- The row for Identifier 506 is highlighted in blue.
- Each row has a checkbox in the "Ok" column.

**Message:** Complete

Step 8. Review the **OK** checkbox and **Messages** to ensure that all changes processed successfully.

Step 9. To review the Timeline of an asset, place the cursor in the **Identifier** field of the item to review and press the **Summary and History** button on the toolbar.

Example:

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets

Identifier

Unique Name

Default Location\*

Identifier Type

Parents

Children

C/A/P

Current Identifier

View Map

Timeline

Details

☒ Include Events

☒ Include Resolutions

☒ Include Contract Reports

☒ Include Meter Readings

☒ Include Open Requests

☒ Include Closed Requests

☒ Include IUID/WAWF

☒ Include Configuration and Kitting

U/I

Other Identifiers

Sort By

1 DATETIME DESC

2 DATETIME DESC

3 DATETIME DESC

Get Records

Datetime	Category	Description	Attributes	Document?
12/11/2012 07:55:28	ONGOING EVENT	CHANGE LOCATION	ARLINGTON, VA_BUILDING_2	Y
12/11/2012 07:55:28	ONGOING EVENT	CHANGE USER	BUCCI HON THOMAS A PHD TBUCCI	Y
12/11/2012 07:55:28	ONGOING EVENT	CHANGE CUSTODIAN	AARON NOAH NAARON	Y
11/09/2012 19:34:09	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST_10000_0	
11/09/2012 19:34:09	INITIAL EVENT	(INV 3) PURCHASE		

Timeline Report

Record Properties

## CREATE REQUEST TO CHANGE ASSET INFORMATION

Users may not have the access to make all changes to the asset records on their own depending upon the policies of the organization. If users do not have sufficient privilege to update the location, custodian, user, or steward, they may use the Request Inventory Asset Change form to request the change. Another user with higher level privileges will review and either accept or deny the change. This form is most often used when transferring assets between stewards. The losing steward enters the request and the gaining steward accepts the request.

### NAVIGATION

- Click Mgmt
- Click Request Inventory Asset Change

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

**Step 2.** Edit the items that need to request a change for the selected assets. In this example, change of **Steward** to **Sunflower Systems**.

**Step 3.** Enter the asset identifier of the asset requesting to be transferred or changed and click the Tab key.

NOTE: Use the search function to query for a group of assets by clicking the **Find** button, entering the query criteria, and then pressing the **Execute** button.

**Step 4.** Ensure that the **Delta** checkbox is enabled for all assets to be transferred.

**Step 5.** Click the **Save** icon to save the transfer or change request.

Example:

Request Inventory Asset Change - asmn2030

Request Information

☒ Steward

ASSET CENTER 03

Rep

INVENTORY THREE INV03

☐ Custodian

Last Name\*

First

Mid

☐ User

Last Name\*

First

Mid

☐ Location\*

Comment

Transfer per request

Assets

Select All

Ok

Δ

Identifier

Manufacturer / Model / Official Name

☒

302

DELL\_ D333\_ COMPUTER, TABLET

☐

☐

☐

☐

☐

☐

☐

☐

☐

Message

Complete

Step 6. Review the **OK** and **Message** fields to ensure that the request saved successfully.

Step 7. Press the **Summary and History** button on the toolbar to view the open request

Example:

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets

Identifier

Identifier Type

Parents

Children

C/A/P

Current Identifier

Unique Name

Default Location\*

View Map

Timeline

Details

☒ Include Events

☒ Include Open Requests

Other Identifiers

☒ Include Resolutions

☒ Include Closed Requests

Sort By 1

☒ Include Contract Reports

☒ Include IUID/WAWF

2

☒ Include Meter Readings

☒ Include Configuration and Kitting

3

Get Records

Timeline Report

Record Properties

## REVIEW AND ACCEPT REQUESTED ASSET CHANGES

When requests are entered for asset changes, an individual with the appropriate roles and organizational contacts must review and either accept or deny the change. There are several ways to discover pending requests awaiting action that include:

- E-mail: Automatic Notification
- Inventory Assets with Requests Report
- Close Inventory Asset Requests
  - Deny Requests
  - Withdraw Requests
  - Accept Request and make additional changes

## INVENTORY ASSETS WITH REQUESTS REPORT

Use the **Inventory Assets with Requests** report to check for pending requests. To run a report perform the following:

### NAVIGATION

- Click Mgmt
- Click Management Reports
- or
- Click Reports
- Click Management Reports
- Click Inventory Assets with Requests


Sunflower Enterprise - Production 5.0.0.0

ASMN0000 Management Reports

To run a report, click one of the links below.

<a href="#">Inventory Assets (Global Information)</a>	<a href="#">Inventory Asset Utilization</a>
<a href="#">Asset Search</a>	<a href="#">Inventory Assets Pending Acceptance by Age</a>
<a href="#">Asset Structure</a>	<a href="#">Inventory Assets Pending Release by Age</a>
<a href="#">Asset Structure by Configured Totals</a>	<a href="#">Inventory Assets with Recently Denied Requests</a>
<a href="#">Inventory Asset Activity Summary by Asset Flag</a>	<a href="#">Inventory Assets with Requests</a>
<a href="#">Inventory Asset Activity Summary by Asset Type</a>	<a href="#">Material On-Hand</a>
<a href="#">Inventory Asset Initial Events</a>	<a href="#">Material On-Loan</a>
<a href="#">Inventory Asset Ongoing Events</a>	<a href="#">Material Transactions</a>
<a href="#">Inventory Asset Final Events</a>	<a href="#">Material Usage Statistics</a>
<a href="#">Inventory Asset History</a>	<a href="#">Material Receipt Ticket</a>
<a href="#">Inventory Asset Interface Processing Results</a>	<a href="#">Material Interface Processing Results</a>
<a href="#">Inventory Asset Summary by Asset Flag</a>	<a href="#">Purchase Order Aging Report</a>
<a href="#">Inventory Asset Summary by Asset Type</a>	<a href="#">High Volume Shipping Interface Processing Results</a>
<a href="#">Inventory Asset Timeline</a>	

[Previously Run Report](#)

[Reports Main Menu](#)

**Step 1.** Navigate to the **Management Reports** screen.

**Step 2.** Click the **Inventory Assets with Requests** report.

**Step 3.** Select the **Requested Steward** by clicking on the **Find** icon and selecting from the list of values.



Sunflower Enterprise Sunflower Enterprise - Production 5.0.0.0

Inventory Assets with Requests Management Reports Menu Submit Clear

Parameters  
Display Options  
Sorting and Grouping  
File Output

CURRENT Steward  
Requested Steward ASSET CENTER 01  
CURRENT Custodian  
Requested Custodian  
CURRENT User  
Requested User

Include the Steward's Child Organization  
Include the Steward's Child Organization

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Step 4. Click the **File Output** tab on the left side.

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Inventory Assets with Requests Management Reports Menu Submit Clear

Parameters  
Display Options  
Sorting and Grouping  
File Output

Choose an output format

Acrobat  
HTML  
Text file export (Excel, Lotus 1-2-3, Access ...)

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Step 5. Select the appropriate **File Output** and click the **Submit** button.

Step 6. Verify the selection criteria on the next screen and click the **eXecute** button.

## CLOSE INVENTORY ASSET REQUESTS

Use the **Close Inventory Asset Request** screen and the information provided by the **Inventory Assets with Requests** report to accept the requested changes to the asset record. If multiple field changes were requested to be updated on a single request, the acceptor will need to accept the change to each field.

### NAVIGATION

- Click Mgmt
- Click Close Inventory Asset Requests

**Step 1.** Navigate to the **Close Inventory Asset Requests** screen.

**Step 2.** Enter the **Identifier** for which the request was made in the **Identifier** field.

NOTE: Alternatively, click the **Find** icon to open **Query Criteria** screen to search for by the Requested information. Select the **Requested** radio dial and enter steward organization in the **Steward** field to search for assets that have been requested to take ownership of.

**Step 3.** Check the **A** (Accept) checkbox to accept the change to each field value that is being requested.

**Step 4.** Click the **Save** icon to save changes to the asset record.

NOTE: It is recommended to save after each decision or after making all inventory asset request decisions (Accept or Deny).

Example:

Close Inventory Asset Requests - asmn2040

Assets

Identifier

Manufacturer / Model / Official Name\*

Model Name

Serial Number

Drawing No.

A - Accept  
D - Deny  
W - Withdraw

☒ A ☐ D ☐ W

☐ ☐ ☐ Steward

☐ ☐ ☐ Custodian

☐ ☐ ☐ User

☐ ☐ ☐ Location

Denial/Withdrawal Reason

Message

Step 5. Review the **Message** field to ensure that the transaction saved successfully.

Step 6. Press the **Summary and History** button on the toolbar to view the timeline

Example:

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets

Identifier  Identifier Type  Parents  Children  C/A/P  Current Identifier

Unique Name

Default Location\*  [View Map](#)

**Timeline** Details

UII

☒ Include Events ☒ Include Open Requests ☒ Include Resolutions ☒ Include Closed Requests ☒ Include Contract Reports ☒ Include IUID/WAWF ☒ Include Meter Readings ☒ Include Configuration and Kitting

Other Identifiers  Sort By 1  2  3  [Get Records](#)

Datetime	Category	Description	Attributes	Document?
12/11/2012 08:09:40	ONGOING EVENT	CHANGE STEWARD	ASSET CENTER 03	<input type="checkbox"/>
12/11/2012 07:59:35	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 03_ Transfer per request	<input type="checkbox"/>
12/11/2012 07:55:28	ONGOING EVENT	CHANGE LOCATION	ARLINGTON, VA_ BUILDING_2	<input checked="" type="checkbox"/>
12/11/2012 07:55:28	ONGOING EVENT	CHANGE USER	BUCCI HON THOMAS A PHD TBUCCI	<input checked="" type="checkbox"/>
12/11/2012 07:50:38	ONGOING EVENT	CHANGE LOCATION	AUSTIN, TX_ BUILDING_2	<input type="checkbox"/>
12/11/2012 07:50:38	ONGOING EVENT	CHANGE USER	MANNION BRIAN BMANNION	<input type="checkbox"/>
12/11/2012 07:36:02	ONGOING EVENT	INVENTORY ASSET ACCEPT		<input type="checkbox"/>
12/11/2012 07:29:13	CLOSED REQUEST	INVENTORY ASSET ACCEPT	ASSET CENTER 01	<input type="checkbox"/>
12/11/2012 07:27:00	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST_2349_0	<input type="checkbox"/>
12/11/2012 07:27:00	INITIAL EVENT	(INV 302) PURCHASE	345	<input type="checkbox"/>

[Timeline Report](#) [Record Properties](#)

DENY REQUESTS

If a user has requested a change to the asset record that either is incorrect or requires additional information prior to acceptance, the approver can deny the request. Depending upon the organization’s setup, denial comments may be required.

NAVIGATION

- Click Mgmt
- Click Close Inventory Asset Request

Close Inventory Asset Requests - asmn2040

Assets

Identifier

Manufacturer / Model / Official Name\*

Model Name

Serial Number

Drawing No.

A - Accept  
D - Deny  
W - Withdraw

A D W  
☐ ☐ ☐ Steward   
☐ ☐ ☐ Custodian   
☐ ☐ ☐ User   
☐ ☐ ☐ Location

Denial/Withdrawal Reason

Message

- Step 1. Navigate to the **Close Inventory Asset Requests** screen.
- Step 2. Click the **Find** icon to open **Query Criteria** screen.
- Step 3. Select the **Requested** radio dial and enter the information of the requested **Steward, Custodian, User** or **Location**.
- Step 4. Select **Inventory** as the asset **Interest Type**.
- Step 5. Click the **Execute** button to retrieve the search results from the database.
- Step 6. Check the **D** (Deny) checkbox to deny the selected asset upon saving.
- Step 7. Enter a comment in the **Denial/Withdrawal Reason** field.
- Step 8. Click the **Save** icon to save the change to the request.

Example:

Close Inventory Asset Requests - asmn2040

Assets

Identifier: 302

Manufacturer / Model / Official Name\*: DELL\_0333\_COMPUTER, TABLET

Model Name:

Serial Number: ALFJEIORJ

Drawing No.:

A - Accept  
D - Deny  
W - Withdraw

A ☐ D ☒ W ☐

Steward: ASSET CENTER 01

Custodian:

User:

Location:

Denial/Withdrawal Reason: please provide documentation with the item

Message: Complete

- Step 9. Review the **Message** field to ensure that the transaction saved successfully.
- Step 10. Press the **Summary and History** button on the toolbar to view the timeline

Example:

Inventory Asset Summary and History - asmin2055 (Page 1 of 2)

Assets

Identifier

Identifier Type

Parents

Children

C/A/P

Current Identifier

Unique Name

Default Location\*

View Map

Timeline

Details

☒ Include Events

☒ Include Resolutions

☒ Include Contract Reports

☒ Include Meter Readings

☒ Include Open Requests

☒ Include Closed Requests

☒ Include IUID/WAWF

☒ Include Configuration and Kitting

Other Identifiers

Sort By 

1 DATETIME DESC

2 DATETIME DESC

3 DATETIME DESC

Get Records

Ull

Datetime	Category	Description	Attributes	Document?
12/11/2012 08:15:10	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 01__please accept this item_pleas	<input type="checkbox"/>
12/11/2012 08:09:40	ONGOING EVENT	CHANGE STEWARD	ASSET CENTER 03	<input type="checkbox"/>
12/11/2012 07:59:35	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 03__Transfer per request	<input type="checkbox"/>
12/11/2012 07:55:28	ONGOING EVENT	CHANGE LOCATION	ARLINGTON, VA__BUILDING__2	<input checked="" type="checkbox"/>
12/11/2012 07:55:28	ONGOING EVENT	CHANGE USER	BUCCI HON THOMAS A PHD TBUCCI	<input checked="" type="checkbox"/>
12/11/2012 07:50:38	ONGOING EVENT	CHANGE LOCATION	AUSTIN, TX__BUILDING__2	<input type="checkbox"/>
12/11/2012 07:50:38	ONGOING EVENT	CHANGE USER	MANNION BRIAN BMANNION	<input type="checkbox"/>
12/11/2012 07:36:02	ONGOING EVENT	INVENTORY ASSET ACCEPT		<input type="checkbox"/>
12/11/2012 07:29:13	CLOSED REQUEST	INVENTORY ASSET ACCEPT	ASSET CENTER 01	<input type="checkbox"/>
12/11/2012 07:27:00	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST__2349__0	<input type="checkbox"/>

Timeline Report

Record Properties

WITHDRAW REQUESTS

A requestor can withdraw their request to transfer an asset to another organization by selecting the **W** (Withdraw) check box.

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

NAVIGATION

- Click Mgmt
- Click Close Inventory Asset Request

The screenshot shows a web application window titled "Close Inventory Asset Requests - asrmn2040". The window contains a form with the following fields and controls:

- Assets** (Section Header)
- Identifier**: A text input field with a yellow highlight.
- Manufacturer / Model / Official Name\***: A text input field.
- Model Name**: A text input field.
- Serial Number**: A text input field.
- Drawing No.**: A text input field.
- Legend**:
  - A - Accept
  - D - Deny
  - W - Withdraw
- Form Controls**:
  - A D W**: Three checkboxes for Accept, Deny, and Withdraw. The **W** checkbox is checked.
  - Steward**: A text input field.
  - Custodian**: A text input field.
  - User**: A text input field.
  - Location**: A text input field.
  - Denial/Withdrawal Reason**: A large text input field.
  - Message**: A text input field.

- Step 1. Navigate to the **Close Inventory Asset Requests** screen.
- Step 2. Enter the asset identifier in the **Identifier** field and press Tab.
- Step 3. Check the **W** (Withdraw) checkbox to withdraw the asset request upon saving.
- Step 4. Enter a comment in the **Denial/Withdrawal Reason** field.
- Step 5. Click the **Save** icon to save changes to the asset request.



Example:

Close Inventory Asset Requests - asmn2040

Assets

Identifier

302

Manufacturer / Model / Official Name\*

DELL\_0333\_COMPUTER, TABLET

Model Name

Serial Number

ALFJEIORJ

Drawing No.

A - Accept

D - Deny

W - Withdraw

A

D

W

☐

☐

☒

Steward

ASSET CENTER 02

☐

☐

☐

Custodian

☐

☐

☐

User

☐

☐

☐

Location

Denial/Withdrawal Reason

made request by mistake

Message

Complete

- Step 6. Review the **Message** field to ensure that the transaction saved successfully.
- Step 7. Press the **Summary and History** button on the toolbar to view the timeline

Example:

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets

Identifier

Identifier Type

Parents

Children

C/A/P

Current Identifier

Unique Name

Default Location\*

View Map

Timeline

Details

☒ Include Events

☒ Include Open Requests

Other Identifiers

☒ Include Resolutions

☒ Include Closed Requests

Sort By 1

☒ Include Contract Reports

☒ Include IUID/WAWF

2

☒ Include Meter Readings

☒ Include Configuration and Kitting

3

Get Records

Datetime	Category	Description	Attributes	Document?
12/11/2012 08:19:06	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 02_made request by mistake	<input type="checkbox"/>
12/11/2012 08:15:10	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 01__please accept this item__pleas	<input type="checkbox"/>
12/11/2012 08:09:40	ONGOING EVENT	CHANGE STEWARD	ASSET CENTER 03	<input type="checkbox"/>
12/11/2012 07:59:35	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 03__Transfer per request	<input type="checkbox"/>
12/11/2012 07:55:28	ONGOING EVENT	CHANGE LOCATION	ARLINGTON, VA__BUILDING __2	<input checked="" type="checkbox"/>
12/11/2012 07:55:28	ONGOING EVENT	CHANGE USER	BUCCI HON THOMAS A PHD TBUCCI	<input checked="" type="checkbox"/>
12/11/2012 07:50:38	ONGOING EVENT	CHANGE LOCATION	AUSTIN, TX__BUILDING __2	<input type="checkbox"/>
12/11/2012 07:50:38	ONGOING EVENT	CHANGE USER	MANNION BRIAN BMANNION	<input type="checkbox"/>
12/11/2012 07:36:02	ONGOING EVENT	INVENTORY ASSET ACCEPT		<input type="checkbox"/>
12/11/2012 07:29:13	CLOSED REQUEST	INVENTORY ASSET ACCEPT	ASSET CENTER 01	<input type="checkbox"/>

Timeline Report

Record Properties

TRANSFER INVENTORY ASSET VALUE

The **Transfer Asset Value** screen provides the ability to transfer values of any interest asset to another asset of the same interest type. Use the **Transfer Inventory Asset Value** screen to transfer the inventory asset value from one asset to another inventory asset.

Scenario: The following graphic illustrates how to transfer asset value from one inventory asset to another. In this example, the inventory asset, **0102**, value is transferred to the inventory asset **0101**.

NAVIGATION

- Click Mgmt
- Click Transfer Inventory Asset Value

Transfer Inventory Asset Value - asmn2190 (Page 1 of 2)

To

IdentifierJAD01

ManufacturerDELLPOWEREDGE R610SERVER

Asset TypeADPEAUTOMATED DATA PROCESSING EQUIPMENT

Acquisition date09/17/2012Flags

Activity StatusIN SERVICEActivity Type

Document\*

User Fields\*

Global User Fields\*

From

IdentifierJAD02Asset Value\$300.00Total Transfer Value\*

ManufacturerDELLPROLIANT D360SERVER BLADE

Page 2

Comment

- Step 1. Navigate to the **Transfer Inventory Asset Value** screen.
- Step 2. Enter the identifier to transfer value to in the in the **Identifier** field of the **To** block.
- Step 3. Enter the identifier to transfer value from in the in the **Identifier** field of the **From** block.
- Step 4. Click the **Comment** button to enter any comments relevant to this inventory asset value transfer transaction.
- Step 5. Double click the **Total Transfer Value** field and enter the **Transfer** amount.

Value Type	Asset Value	User Fields*	Transfer	User Fields*
ACQUISITION COST	\$300.00		\$100.00	
Total Value	\$300.00		Total Transfer Value	\$100.00

- Step 6. Click the **Save** icon to return to the **Transfer Inventory Asset Value** screen.
- Step 7. Click the **Save** icon again to complete the transfer of value to the selected inventory asset.

EDIT COMMENTS, ATTACHMENTS AND PICTURES

The **Maintain Inventory Asset Comment/Picture** screen enables users with the ACR role to capture the condition of an inventory asset by attaching pictures, documents or comments associated with an inventory asset. This screen is provided from the main menu because the ACR does not have access to the **Maintain Inventory Assets** screen which is the alternative method for accessing the **Maintain Inventory Asset Comment/Picture** screen.

Scenario: The following graphic illustrates how to use the **Maintain Inventory Asset Comment/Picture** screen to add additional details for an inventory asset record by capturing comments, attaching pictures, and other related documents.

NAVIGATION

- Click Mgmt
- Click Maintain Inventory Asset Comment/Picture
- Click the Asset Identifier
- Click the Tab key

The screenshot shows a web browser window titled "Maintain Inventory Asset Comment/Picture - asmn2070". Inside the window, there is a section labeled "Assets" containing a table with the following data:

Identifier	Manufacturer	Model	Official Name
JAD01	DELL	POWEREDGE R610	SERVER

NAVIGATION

- Click the Comments tab

The screenshot shows a web browser window titled "Capture Comments, Pictures and Attachments - saut0060". The window has a search bar at the top containing "INVENTORY ASSET JAD01". Below the search bar are three tabs: "Comments", "Pictures", and "Attachments". The "Comments" tab is selected. The main area of the window is divided into three sections:

- Comment Type:** A dropdown menu with "COMMENT" selected.
- New Comment:** A large text area for entering a new comment.
- Comment History:** A list of previous comments. The first entry is: "\*\*\* ONE ADM ADM01 on 09/17/2012 13:39:56". Below this, the text "This server needs frequent repairs." is visible.

**Step 1.** Navigate to the **Maintain Inventory Asset Comment/Picture** screen.

**Step 2.** Enter the asset identifier in the **Identifier** field. In this case, the asset identifier is **JAD01**. The existing information for the selected inventory asset record will populate the screen.

**Step 3.** Click the Tab key to open the **Comments** screen for the specified asset.

**Step 4.** Select the type of comment to create from list of values. The choices are **Comment** or **Text**.

**Step 5.** Enter comments for the selected inventory asset record in the **New Comment** text area.

**Step 6.** Click the **Save** icon to save the updated comments.

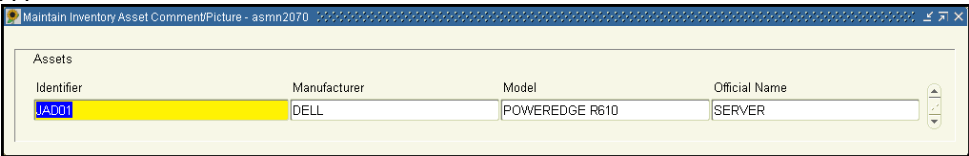
**NOTE:** The **Comment History** area displays the user ID, the date and time of previous comments and the new comments (upon saving).

ADD PICTURES

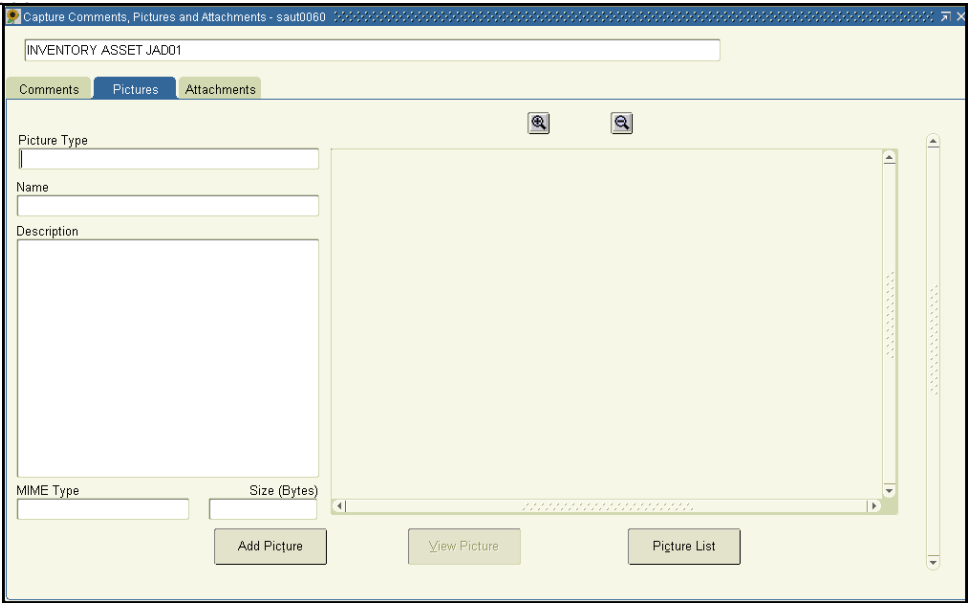
Use the **Pictures** tab to add pictures related to a specified asset with the **Add Picture** button. If there is more than one picture attached to an asset, use the **Picture List** button to view the list of pictures associated to the asset. Use the **View Picture** button to view a picture in a separate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

Scenario: The following graphic illustrates how to use **Capture Comments, Picture and Attachments** screen to attach a picture to an inventory asset record.

- NAVIGATION
- Click Mgmt
  - Click Maintain Inventory Asset Comment/Picture
  - Click the Asset Identifier
  - Click the Tab key



- NAVIGATION
- Click the Pictures Tab



- Step 1. Navigate to the **Maintain Inventory Asset Comment/Picture** screen.
- Step 2. Enter the asset identifier in the **Identifier** field and click Tab. The existing information for the selected inventory asset record will populate the screen.

**Step 3.** Click the Tab key to open the **Capture Comments, Pictures and Attachments** screen for the specified asset.

**Step 4.** Click the **Pictures** tab.

**Step 5.** Click the **Add Picture** button to open the **Picture Upload** screen.

**Step 6.** Navigate to the related asset picture file and choose the appropriate picture.

**Step 7.** Navigate to the **Maintain Inventory Asset Comment/Picture** screen.

## NAVIGATION

- Click Pictures tab
- Click Add Picture

**Step 8.** Click the **Browse** button to select a picture from a directory path where the picture resides.

**Step 9.** Select the type of picture to upload in the **Picture Type** field.

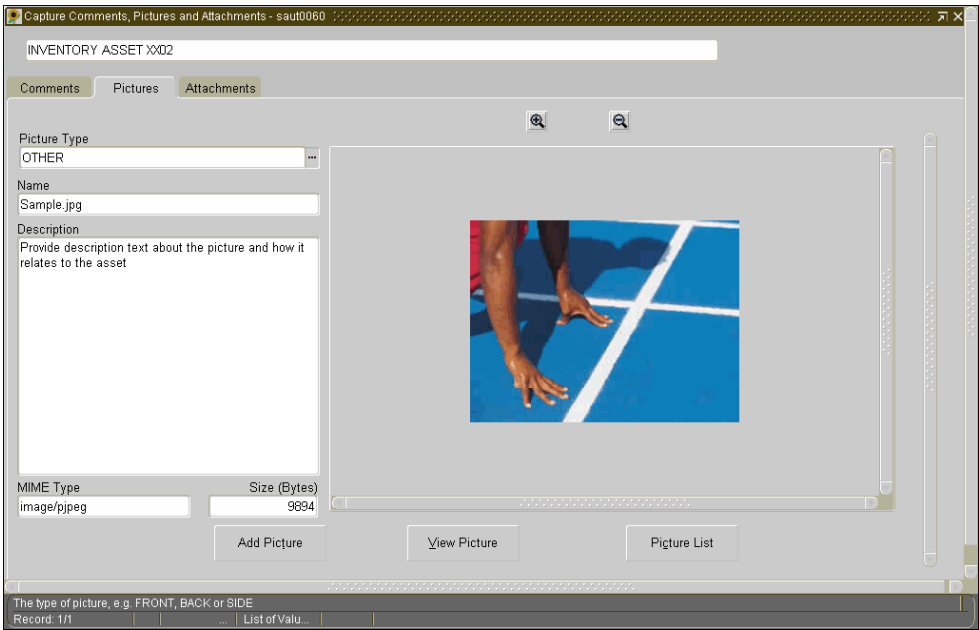
**Step 10.** Use the **Description** field to provide descriptive text about the picture and how it relates to the asset.

**Step 11.** Click the **Upload** button. If successful, a web page pops up indicating that the file uploaded successfully. Close the web page to return to Sunflower Assets.



Step 12. Click the **OK** button to display the picture.

**NAVIGATION**  
View the new picture  
Add more pictures as required



Step 13. Click the **Save** icon to save the changes.

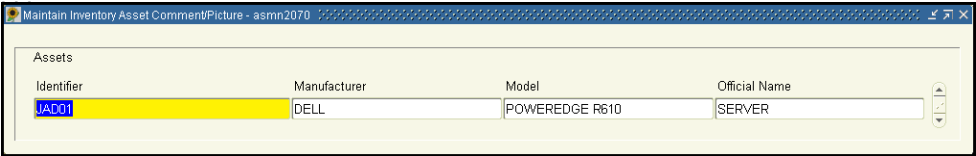
ADD ATTACHMENTS

Use the **Attachment** tab to add documents related to the specified asset with the **Add Attachment** button. If more than one attachment has been added to an asset record, use the **Attachment List** button to view the list of attachments associated to the asset.

Scenario: The following graphic illustrates how to upload an attachment to an inventory asset record.

NAVIGATION

- Click Mgmt
- Click Maintain Inventory Asset Comment/Picture
- Click Asset Identifier
- Click Tab key

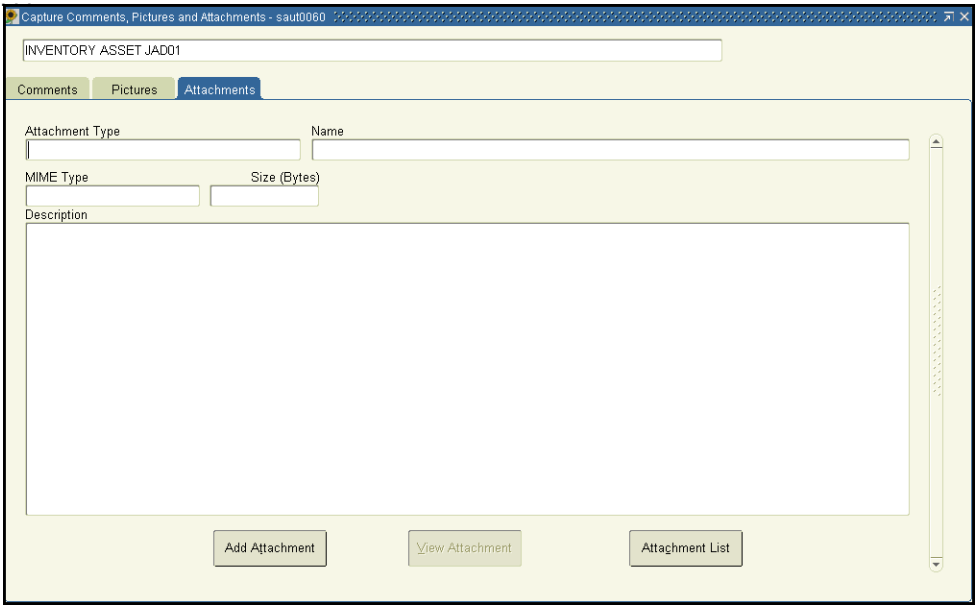


The screenshot shows a window titled "Maintain Inventory Asset Comment/Picture - asrm2070". It contains a table with the following data:

Identifier	Manufacturer	Model	Official Name
JAD01	DELL	POWEREDGE R610	SERVER

NAVIGATION

- Click Attachments tab



The screenshot shows a window titled "Capture Comments, Pictures and Attachments - saut0060". It has three tabs: "Comments", "Pictures", and "Attachments". The "Attachments" tab is active. It contains the following fields:

- Attachment Type:
- Name:
- MIME Type:
- Size (Bytes):
- Description:

At the bottom, there are three buttons: "Add Attachment", "View Attachment", and "Attachment List".

- Step 1.** Navigate to the **Maintain Inventory Asset Comment/Picture** screen.
- Step 2.** Enter the asset identifier in the **Identifier** field and click Tab. The existing information for the selected inventory asset record will populate the screen.
- Step 3.** Click the **Attachments** tab to open the **Attachment Upload** dialog box.

- Step 4. Click the **Browse** button to select an attachment from its location on the local or shared directory.
- Step 5. Use the **Attachment Type** field to select the type of attachment to be uploaded.
- Step 6. Use the **Description** field to provide descriptive text about the attachment and how it relates to the asset.
- Step 7. Click the **Upload** button. If successful, a web page pops up indicating that the file uploaded successfully. Close the web page to return to Sunflower Assets. Close the web page to return to Sunflower Assets.
- Step 8. Click the **OK** button to display the attachment.
- Step 9. Click the **Save** icon to save the changes.

## DOCUMENT SEARCH

Sunflower provides the ability to search for attachments and documents that are associated with asset records and agreements. Not only can the document search feature enable searching and retrieval of documents but it can also search and retrieve comments, or document content for specific formats such as MS Word documents, MS Excel and Adobe PDF files. The Document Search feature searches all attachments in the Sunflower database. The search and retrieval process will return a scored list of relevant items from which users can select one or more desired items to view.

NOTE: The search function is an Oracle text object that requires one extra table and 2 extra indexes. To enable the **Search Document** feature, use the scripts provided on the installation CD to run and install the search component.

Scenario: The following graphic illustrates how to search the Sunflower database for documents and attachments.

### NAVIGATION

- Click Search Attachments and Comments



**Step 1.** From the Production page, click the **Search Attachments and Comments** link. The search page displays.

NOTE: The Search menu is similar to a Report or HTML transaction page.

#### NAVIGATION

- Click Search Attachments and Comments
- Click appropriate search parameters
- Click Search

#### Step 2. Enter search parameters.

- Enter search terms in the **Search for** field or use the % wildcard to search for all documents and/or comments.
- Select one or more options in which to search for the key word(s).
  - *In comments*
  - *In attachment description*
  - *In attachment content*
- Select one or more **Attachment Types** to be retrieved if the keyword(s) have a match in the specified type. The list of choices depends on what is available in the database.
  - *Excel document*
  - *Graphic file (JPEG, BMP, GIF, etc.)*
  - *PDF document*
  - *Word document*

Step 3. Click the **SEARCH** button to return the results of the search criteria.

- NAVIGATION
- Click Search Attachments and Comments
  - Click Select search parameters
  - Click SEARCH
  - Click Select to view

SunflowerEnterpriseSunflower Enterprise - Production 5.0.0.0

Welcome: Adm One

Search forserver

☒ In comments? ☐ In attachment description? ☐ In attachment content?

Attachment Types

All TypesClear

☐ GIF ☐ JPEG ☐ Other ☐ PDF ☐ Word ☐ image/x-png ☐ text/xml

Search

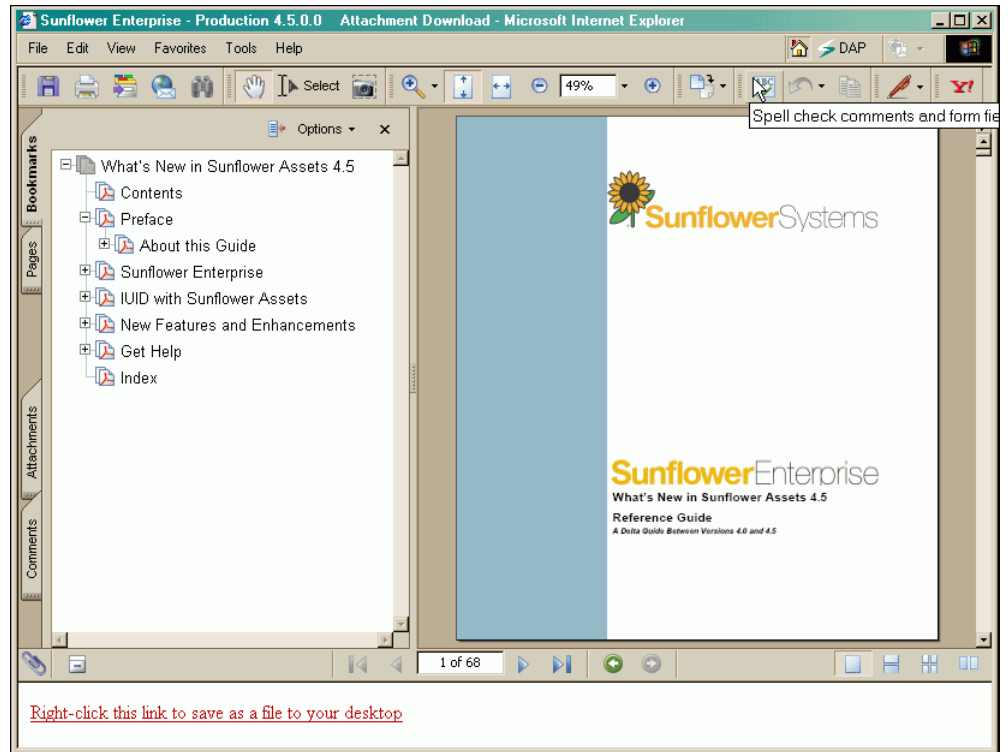
Search Results

Select	Comment Score	Name	Type	Size	Description	Captured For
<div>Open</div>						
	8		COMMENT/COMMENT	77	*** ONE ADM ADM01 on 09/17/2012 13:39:56 This server needs frequent repairs.	<u>INVENTORY ASSET JAD01</u>

**Step 4.** Check the select box and **OPEN** to view or simply click the document name link to view the details of the file.

#### NAVIGATION

- Click Search Attachments and Comments
- Click Select search parameters
- Click Search
- Click Select box
- Click Open to view



MAINTAIN ASSET STRUCTURES (PARENT/CHILD RELATIONSHIPS)

Most assets stand alone as individual assets; however, others may be related to one another. For example, one may have a vehicle that has a specific component, like a radio, included or mounted in the vehicle. Sunflower allows organizations to create structure types and create parent/child relationships between identified assets. This functionality allows users to see that assets are related to one another, but does not automatically apply attributes of the parent to children. For example, if one has a server rack as a parent of three servers. If a user changes the location of the server rack, the servers within the rack do not get the updated location. Scenario: The following graphic illustrates how to tell if an asset has an associated parent asset or children assets.

- NAVIGATION
- Click Mgmt
  - Click Inventory Asset Summary and History

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets

Identifier: JAD01

Identifier Type:

Parents: 0

Children: 1

Current Identifier: JAD01

Unique Name:

Default Location:

View Map

Timeline Details

UII: None Captured

Other Identifiers: INV / JAD01

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

Get Records

Datetime	Category	Description	Attributes	Document?
09/18/2012 07:14:11	PARENT/CHILD	ADD CHILD - INV JAD02 (COMPONENT 01)		
09/17/2012 11:40:52	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST_500_0	
09/17/2012 11:40:51	INITIAL EVENT	(INV JAD01) PURCHASE		

Timeline Report Record Properties

The **Parents** and **Children** fields display the number of parent and/or child records for the current asset record. An asset record can have multiple parents and children.

Double-click the **Parents** and **Children** field to view the respective information. Double-clicking on either field will open the **Maintain Asset Structures** screen where parent and child information can be viewed for the selected asset record.



Scenario: The following graphic illustrates how to view the parent-child relationship for a specific asset record and drill down for additional details. The **Related Assets** block of the **Maintain Asset Structures** screen lists the asset details of the child asset.

- NAVIGATION**
- Click Mgmt
  - Click Inventory Asset Summary and History
  - Click Double-click Parent or Child field
- or
- Click Mgmt
  - Click Maintain Asset Structures

The screenshot shows the 'Maintain Asset Structures' window for user 'asmin2015'. It features a table for the selected asset (JAD01) and a 'Related Assets' section below it.

Asset						
Type	Identifier	Manufacturer	Model	Official Name	P	C
INV	JAD01	DELL	POWEREDGE R610	SERVER		Y
Structure Type: COMPONENT 01				Display <input type="radio"/> Parents <input checked="" type="radio"/> Children		

Related Assets						
Ok	Type	Identifier	Manufacturer	Model	Official Name	P C
<input type="checkbox"/>	INV	JAD02	DELL	PROLIANT D360	SERVER BLADE	Y
User Fields* [Start Datetime: 09/18/2012 07:14:11 AM]						
<input type="checkbox"/>						
User Fields* [Start Datetime: ]						
<input type="checkbox"/>						
User Fields* [Start Datetime: ]						
<input type="checkbox"/>						
User Fields* [Start Datetime: ]						
<input type="checkbox"/>						
User Fields* [Start Datetime: ]						

Buttons: Children, Parents

Message: [ ]

Use the **Display Parents** or **Children** radio button selections to display parent or child assets in the **Related Assets** block. The **Children** and **Parents** buttons at the bottom of the screen perform the same function.

MAINTAIN INVENTORY ASSET ONGOING EVENTS

Sunflower uses the concept of **Ongoing Events** to support the various activities that occur during an asset's lifecycle. For example, an asset may require periodic diagnostic testing to validate whether the asset is in proper working order or if the asset requires maintenance. Use the **Maintain Inventory Ongoing Events** screen to record each instance that a designated asset receives diagnostic testing and if necessary, send out and record the maintenance of the asset. This provides an accurate history of assets and their maintenance records. **Ongoing Events** can be entered as either **Assets to Events** or **Events to Assets** by selecting the desired tab.

**Assets to Events:** allows users to enter multiple ongoing events to a *single asset*.

**Events to Assets:** allows users to enter a single ongoing event to *multiple assets*.

- NAVIGATION
- Click Mgmt
  - Click Maintain Inventory Asset Ongoing Events

Ok	Datetime	Ongoing Event	Event Details*	Document*	C/A/P
<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"/>					
<input type="checkbox"/>					

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

Step 2. Enter an asset identifier in the **Identifier** field.

NOTE: After entering a value in a field, hit the Tab key to move to the next field. Sunflower automatically populates default values when defaults are available.

Step 3. Place the cursor in the **Events** block

- Step 4. Update the **Date** of the event as necessary
- Step 5. Select the ongoing event from the LOV in the **Ongoing Event** field.
- Step 6. Double click in the **Event Details** field to enter any required values in the ongoing event User Defined Fields
- Step 7. Double click in the **Document** field to associate a document to the event.
- Step 8. Click the **Comment/Attachment/Pict...** button to enter any comments relevant to this asset and its ongoing event.
- Step 9. Click the **Save** icon to save the ongoing event.

Example:

The screenshot shows a software window titled "Maintain Inventory Asset Ongoing Events - asoe0010". It has two tabs: "Assets to Events" and "Events to Assets". The "Assets to Events" tab is active. Below the tabs, there is an "Asset" section with two fields: "Identifier" (containing "302") and "Descriptives\*" (containing "DELL\_D333\_COMPUTER, TABLET"). Below this is an "Ongoing Events" section containing a table with the following columns: "Ok", "Datetime", "Ongoing Event", "Event Details\*", "Document\*", and "C/A/P". The first row of the table is selected, showing a checked "Ok" box, the datetime "12/11/2012 08:33:45", the event "SHIPPED FOR REPAIR", details "DELL PEROT", document "CUSTODIAN RECEIPT\_0000000202", and an empty "C/A/P" field. Below the table, there are fields for "Created by" (containing "FELDMAN DR JOHN A JR JFELDMAN") and "Message" (containing "Complete"). To the right of these fields is a button labeled "Comment / Attachment / Picture".

Ok	Datetime	Ongoing Event	Event Details*	Document*	C/A/P
<input checked="" type="checkbox"/>	12/11/2012 08:33:45	SHIPPED FOR REPAIR	DELL PEROT	CUSTODIAN RECEIPT_0000000202	
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

- Step 10. Click on the **Summary and History** button on the toolbar to view the asset timeline

Example:

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets

Identifier Type

Parents 0

Children 0

C/A/P

Identifier 302

Current Identifier 302

Unique Name

Default Location\*

View Map

Timeline

Details

☒ Include Events

☒ Include Resolutions

☒ Include Contract Reports

☒ Include Meter Readings

☒ Include Open Requests

☒ Include Closed Requests

☒ Include IUID/WAWF

☒ Include Configuration and Kitting

Other Identifiers INV / 302

Sort By 1 DATETIME DESC

2 DATETIME DESC

3 DATETIME DESC

Get Records

UUI None Captured

Datetime	Category	Description	Attributes	Document?
12/11/2012 08:33:45	ONGOING EVENT	SHIPPED FOR REPAIR	DELL PEROT	Y
12/11/2012 08:19:06	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 02_made request by mistake	
12/11/2012 08:15:10	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 01__please accept this item__pleas	
12/11/2012 08:09:40	ONGOING EVENT	CHANGE STEWARD	ASSET CENTER 03	
12/11/2012 07:59:35	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 03__Transfer per request	
12/11/2012 07:55:28	ONGOING EVENT	CHANGE LOCATION	ARLINGTON, VA__BUILDING__2	Y
12/11/2012 07:55:28	ONGOING EVENT	CHANGE USER	BUCCI HON THOMAS A PHD TBUCCI	Y
12/11/2012 07:50:38	ONGOING EVENT	CHANGE LOCATION	AUSTIN, TX__BUILDING__2	
12/11/2012 07:50:38	ONGOING EVENT	CHANGE USER	MANNION BRIAN BMANNION	
12/11/2012 07:36:02	ONGOING EVENT	INVENTORY ASSET ACCEPT		

Timeline Report

Record Properties

## MAINTAIN INVENTORY ASSET USER FIELDS

The **Maintain Inventory Assets User Fields** screen enables the ACR role to set the user-defined fields for an inventory asset. Alternatively, the Inventory Manager and Inventory Clerk roles can designate the asset user defined field value by using the **Maintain Inventory Assets** screen. A user with the ACR role does not have access to the **Maintain Inventory Assets** screen and as a result, must use this screen to perform this function

### NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets User Fields

Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/> JADD01	DELL	POWEREDGE R610	SERVER
User Fields* <input type="text"/>			
Message <input type="text"/>			
<input type="checkbox"/>			
User Fields* <input type="text"/>			
Message <input type="text"/>			
<input type="checkbox"/>			
User Fields* <input type="text"/>			
Message <input type="text"/>			
<input type="checkbox"/>			
User Fields* <input type="text"/>			
Message <input type="text"/>			
<input type="checkbox"/>			
User Fields* <input type="text"/>			
Message <input type="text"/>			

**Step 1.** Navigate to the **Maintain Inventory Assets User Fields** screen.

**Step 2.** Enter the asset identifier in the **Identifier** field and press the Tab key to display the asset's information.

**NOTE:** To find a particular asset or to find a group of assets, click the **Find** icon to display the **Query Criteria** screen. Enter the information known (steward, location, user, etc.). Be sure to select the **Requested** check box near the top of the screen. Click the **Execute** button at the bottom of the screen.

- Sunflower finds all the assets that match the criteria. The bottom of the screen indicates the number of records found matching the criteria. To move between multiple records, use the up and down arrow keys, or click the **Previous Record** and **Next Record** icons in the toolbar.
- If a particular asset should not change, de-select the check box next to the asset.

- Step 3. Place the cursor in the **User Fields** field and double click or click the **Edit** icon to display the pop-up window.
- Step 4. Enter the appropriate information for the user field.
- Step 5. Click the **Save** icon to save the user field updates and return to the **Maintain Inventory Asset User Fields** screen.

## USING THE INACTIVE MODULE WITH INVENTORY ASSETS

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

The Inactive module provides an effective way to manage storage facilities. For example, there are many cases when assets are ordered for pending projects and the owning organization is not yet ready to utilize the asset. This asset may require special storage that can be better handled by a warehouse facility that manages the receipt and storage of assets. Alternatively, an asset could be used and in good condition but the organization has no further use for the asset. By sending the asset to an inactive storage facility, give the entire enterprise the opportunity to search for assets that may be put back into service. Instead of purchasing a brand new asset, the asset can be reused, reducing the costs of purchases for an asset supporting the goals of the entire enterprise. Lastly, there are certain assets that require very specific storage conditions; the Inactive module enables users to specify unique requirements related to assets so that the assets are stored in the proper condition.

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

- Request an Inactive Receipt Request
- Withdraw Inactive Receipt Request
- Request Inactive Asset Redeployment
- Withdraw Inactive Redeployment Requests

## CREATE AN INACTIVE RECEIVAL REQUEST

There are times when users may want to store an asset for later use. The asset may be a new asset that has been purchased and designated for a project that is not yet ready to utilize the asset. This asset may require special storage that can be better handled by an organization that oversees controlled property storage. Alternatively, an asset could be used and in good condition but the organization has no further use for the asset. By sending the used asset to an inactive storage facility, give the entire enterprise the opportunity to search for and request that the inactive asset be transferred to their organization and put to use for another project that supports the goals of the entire enterprise. To assure that the assets have proper storage and can be made available when needed, request that the assets be placed in an inactive mode and stored under the proper conditions.

Sunflower provides the Inactive module to handle inactive assets requests for Agreement Assets, Inventory Assets, Financial Assets and Excess Assets. This section covers the inactive asset request process.

### NAVIGATION

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

**Step 6.** Navigate to the Request Inventory Asset Inactive Receival screen.

**Step 7.** Enter the inactive request pickup and deliver-to locations.

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



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

**Step 8.** Enter the asset identifier in the **Identifier** field for the item requesting an inactive receival. The **Manufacturer**, **Model**, and **Official Name** fields auto-populate.

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

**Step 9.** Use the **Inactive Type** field to select the type of storage required for the asset. Specify detailed storage instructions with the **Unique Requirements** text box below.

**Step 10.** Specify whether the asset is available for loan (**Y** for Yes or **N** for No) to others during its inactive period.

**Step 11.** Enter the duration of the asset's inactive period in the **Duration (yrs)** field. The length of the inactive period is designated in years (e.g, 0.5 = 1/2 year).

**Step 12.** Enter the account to charge storage and related costs for the inactivating the asset in the **Recharge Identifier** field.

**Step 13.** Specify any special considerations for the handling and storage of the asset (e.g. hazard, special storage needs, etc.) in the **Unique Rqmts** text box.

**Step 14.** Specify any general comments (e.g. pick up times, etc.) in the **Comment** text box.

**Step 15.** Double-click in the **Additional Information\*** field to enter any other pertinent information associated with the inactive receival request

NOTE: Unless the **ASSET REQUEST UDF** attribute set is configured by an Administrator, there will not be any **Additional Information** fields.

**Step 16.** Click the **Save** icon to save the request. Notice the system generated request number. This number will be used to complete the inventory asset inactive receival request later.

## Example:

Request Inventory Asset Inactive Receive - asin2120

Request Information

Make inactive in-place? ☐

Pick-up Location \* ARLINGTON, VA\_BUILDING\_1\_ROOM\_B

Deliver-to Location \* ARLINGTON, VA\_BUILDING\_2

Assets

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 302	DELL	D333	COMPUTER, TABLET

Request No 181 Inactive Type INACTIVE

Available to others? ☒ Y Duration (yrs) 1 Recharge Identifier NONE

User JFELDMAN Last Name\* FELDMAN First JOHN Mid A

Unique Rqmts NONE

Comment Please provide 2 hours notice prior to pickup

Additional Information\*

Message Complete

Step 17. Click the **Summary and History** button to view the timeline

Example:

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets

Identifier

Identifier Type

Parents

Children

C/A/P

Current Identifier

Unique Name

Default Location\*

View Map

Timeline

Details

☒ Include Events

☒ Include Resolutions

☒ Include Contract Reports

☒ Include Meter Readings

☒ Include Open Requests

☒ Include Closed Requests

☒ Include IUID/WAWF

☒ Include Configuration and Kitting

Other Identifiers

Sort By 

1 DATETIME DESC

2 DATETIME DESC

3 DATETIME DESC

Get Records

Datetime	Category	Description	Attributes	Document?
12/11/2012 08:41:42	OPEN REQUEST	INACTIVE RECEIVAL	181__N__INACTIVE__Y_FELDMAN DR JOHN A JR.	<input type="checkbox"/>
12/11/2012 08:33:45	ONGOING EVENT	SHIPPED FOR REPAIR	DELL PEROT	<input checked="" type="checkbox"/>
12/11/2012 08:19:06	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 02__made request by mistake	<input checked="" type="checkbox"/>
12/11/2012 08:15:10	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 01__please accept this item__pleas	<input checked="" type="checkbox"/>
12/11/2012 08:09:40	ONGOING EVENT	CHANGE STEWARD	ASSET CENTER 03	<input checked="" type="checkbox"/>
12/11/2012 07:59:35	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 03__Transfer per request	<input checked="" type="checkbox"/>
12/11/2012 07:55:28	ONGOING EVENT	CHANGE LOCATION	ARLINGTON, VA__BUILDING__2	<input checked="" type="checkbox"/>
12/11/2012 07:55:28	ONGOING EVENT	CHANGE USER	BUCCI HON THOMAS A PHD TBUCCI	<input checked="" type="checkbox"/>
12/11/2012 07:50:38	ONGOING EVENT	CHANGE LOCATION	AUSTIN, TX__BUILDING__2	<input checked="" type="checkbox"/>
12/11/2012 07:50:38	ONGOING EVENT	CHANGE USER	MANNION BRIAN BMANNION	<input checked="" type="checkbox"/>

Timeline Report

Record Properties

## WITHDRAW INACTIVE RECEIVAL REQUEST

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

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

### NAVIGATION

- Click Inactive
- Click Withdraw Inactive Receival Request

The screenshot shows a web-based form titled "Withdraw Inactive Receival Request - asmn2120". The form is organized into several sections. At the top, there's a "Requests" section with a table-like structure. Below this, there are various input fields and checkboxes. The "Ok Request No" field is highlighted in yellow. The "Withdraw Reason" field is also highlighted in yellow. The "Message" field is at the bottom.

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

**Step 2.** Enter the inactive request number that was generated when the original request was made to inactivate the asset in the **Request No** field.

**Step 3.** Enter **Withdraw Reason** if required

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

Example:

Withdraw Inactive Receival Request - asmn2120

Requests

Ok Request No	Identifier	Manufacturer	Model	Official Name	
<input checked="" type="checkbox"/>	181	INV 302	DELL	D333	COMPUTER, TABLET

Inactive Type

INACTIVE

Available to others?

Y

Duration (yrs)

1

Recharge Identifier

NONE

Pick-up Location

ARLINGTON, VA\_\_BUILDING\_\_1\_\_ROOM\_\_B

Deliver-to Location

ARLINGTON, VA\_\_BUILDING\_\_2

User

FELDMAN DR JOHN A JR JFELDMAN

Unique Requirements

NONE

Comment

Please provide 2 hours notice prior to pickup

Withdraw Reason

found use within department

Additional Information\*

Message

Complete

Step 5. Click the **Summary and History** button to view the timeline

Example:

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets

Identifier

Identifier Type

Parents

Children

C/A/P

Current Identifier

Unique Name

Default Location\*

View Map

Timeline

Details

☒ Include Events

☒ Include Resolutions

☒ Include Contract Reports

☒ Include Meter Readings

☒ Include Open Requests

☒ Include Closed Requests

☒ Include IUID/WAWF

☒ Include Configuration and Kitting

Other Identifiers

Sort By

1

2

3

Get Records

U/I

Datetime	Category	Description	Attributes	Document?
12/11/2012 08:41:42	CLOSED REQUEST	INACTIVE RECEIVAL	181__N__INACTIVE__Y_FELDMAN DR JOHN A JR.	<input type="checkbox"/>
12/11/2012 08:33:45	ONGOING EVENT	SHIPPED FOR REPAIR	DELL PEROT	<input checked="" type="checkbox"/>
12/11/2012 08:19:06	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 02__made request by mistake	<input type="checkbox"/>
12/11/2012 08:15:10	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 01__please accept this item__pleas	<input type="checkbox"/>
12/11/2012 08:09:40	ONGOING EVENT	CHANGE STEWARD	ASSET CENTER 03	<input type="checkbox"/>
12/11/2012 07:59:35	CLOSED REQUEST	CHANGE STEWARD	ASSET CENTER 03__Transfer per request	<input type="checkbox"/>
12/11/2012 07:55:28	ONGOING EVENT	CHANGE LOCATION	ARLINGTON, VA__BUILDING__2	<input checked="" type="checkbox"/>
12/11/2012 07:55:28	ONGOING EVENT	CHANGE USER	BUCCI HON THOMAS A PHD TBUCCI	<input checked="" type="checkbox"/>
12/11/2012 07:50:38	ONGOING EVENT	CHANGE LOCATION	AUSTIN, TX__BUILDING__2	<input type="checkbox"/>
12/11/2012 07:50:38	ONGOING EVENT	CHANGE USER	MANNION BRIAN BMANNION	<input type="checkbox"/>

Timeline Report

Record Properties

## REQUEST INACTIVE ASSETS

Users may request inactive assets for use. To do so, users complete an Inactive Asset Redeployment Request. After receiving the redeployment request, the controlled property storage organization can place the asset back in service. This describes how to redeploy an inactive inventory asset using the **Request Inactive Asset Redeployment** screen.

### NAVIGATION

- Click Inactive
- Click Request Inactive Asset Redeployment

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

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

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

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

**Step 5.** Double-click in the **Additional Information\*** field to enter any other pertinent information associated with the inactive receipt request

**NOTE:** Unless the **ASSET REQUEST UDF** attribute set is configured by an Administrator, there will not be any **Additional Information** fields.

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

**Example:**

The screenshot shows a web application window titled "Request Inactive Asset Redeployment - asin2130". The window contains the following fields and sections:

- Request Information:**
  - Deliver-to Location \***: A text field containing "ARLINGTON, VA\_BUILDING\_1\_ROOM\_B".
- Assets:**
  - A table with columns: **Ok**, **Identifier**, **Manufacturer**, **Model**, and **Official Name**.
  - Row 1: ☒ in the **Ok** column, "NA23" in the **Identifier** column, "FORD" in the **Manufacturer** column, "EXPLORER" in the **Model** column, and "TRUCK" in the **Official Name** column.
- Request No**: A text field containing "182".
- Comment**: A text area containing "Please provide a day notice".
- Message**: A text field containing "Complete".

**Step 7.** Click the **Summary and History** button to view the timeline



Example:

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

Assets

Identifier  Identifier Type  Parents 0  Children 0  C/A/P

Unique Name

Default Location\*

Timeline Details

UII

☒ Include Events ☒ Include Open Requests Other Identifiers

☒ Include Resolutions ☒ Include Closed Requests

☒ Include Contract Reports ☒ Include IUID/WAWF

☒ Include Meter Readings ☒ Include Configuration and Kitting

Sort By 1  2  3

Datetime	Category	Description	Attributes	Document?
12/11/2012 08:49:57	RESOLUTION	INACTIVE REDEPLOY	FELDMAN DR JOHN A JR JFELDMAN	<input type="button" value="Q"/>
12/11/2012 08:49:57	OPEN REQUEST	INACTIVE REDEPLOY	182 _ARLINGTON, VA _BUILDING _1 _ROOM _B_	<input type="button" value="Q"/>
11/15/2012 09:54:03	ONGOING EVENT	SENT FOR REPAIRS		<input type="button" value="Q"/>
11/14/2012 14:23:58	ONGOING EVENT	CHANGE USER	RAZA ANNAM ARAZA	<input type="button" value="Q"/>
11/14/2012 14:23:58	ONGOING EVENT	CHANGE CUSTODIAN	RAZA NAEEM NRAZA	<input type="button" value="Q"/>
11/14/2012 14:23:57	ONGOING EVENT	INTO INACTIVE		<input type="button" value="Q"/>
11/14/2012 14:23:57	INITIAL EVENT	(INA INA23) RECEIVE INACTIVE ASSET		<input type="button" value="Q"/>
11/14/2012 14:18:52	CLOSED REQUEST	INACTIVE RECEIVAL	86 _Y _INACTIVE _Y _RAZA ANNAM ARAZA _2_	<input type="button" value="Q"/>
11/14/2012 14:14:49	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST _35000 _0	<input type="button" value="Q"/>
11/14/2012 14:14:49	INITIAL EVENT	(FIN ANNAMTEST0202) PURCHASE		<input type="button" value="Q"/>

## WITHDRAW INACTIVE REDEPLOYMENT REQUESTS

If a request was made to redeploy an asset and that asset cannot be placed back into service, it can be withdrawn.

Scenario: The following graphic illustrates how to use the **Withdraw Inactive Redeployment Request** screen to withdraw a request to re-use an inactive asset.

### NAVIGATION

- Click Inactive
- Click Withdraw Inactive Redeployment Request

Withdraw Inactive Redeployment Request - asmn2120

Requests

Ok Request No	Identifier	Manufacturer	Model	Official Name
<input type="checkbox"/>				

Deliver-to Location

Comment

Message

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

**Step 2.** Enter the request number from the original inactive asset redeployment request in the **Request No** field.

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

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

Example:

Withdraw Inactive Redeployment Request - asmn2120

Requests

Ok Request No	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/> 182	INA_INA23	FORD	EXPLORER	TRUCK

Deliver-to Location

Comment

ARLINGTON, VA\_\_BUILDING\_\_1\_\_ROOM\_\_B

Please provide a day notice

Message

Complete

Step 5. Click the **Summary and History** button to view the timeline

## USING THE INACTIVE MODULE WITH INVENTORY ASSETS

Example:

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

Assets

Identifier:  Identifier Type:  Parents: 0 Children: 0 C/A/P:

Unique Name:  Current Identifier:

Default Location:  View Map

Timeline Details

UII:

Other Identifiers:

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

Get Records

Datetime	Category	Description	Attributes	Document?
12/11/2012 08:49:57	RESOLUTION	INACTIVE REDEPLOY	FELDMAN DR JOHN A JR JFELDMAN	<input type="checkbox"/>
12/11/2012 08:49:57	CLOSED REQUEST	INACTIVE REDEPLOY	182 _ARLINGTON, VA _BUILDING _1 _ROOM _B_	<input type="checkbox"/>
11/15/2012 09:54:03	ONGOING EVENT	SENT FOR REPAIRS		<input type="checkbox"/>
11/14/2012 14:23:58	ONGOING EVENT	CHANGE USER	RAZA,ANNAM ARAZA	<input type="checkbox"/>
11/14/2012 14:23:58	ONGOING EVENT	CHANGE CUSTODIAN	RAZA NAEEM NRAZA	<input type="checkbox"/>
11/14/2012 14:23:57	ONGOING EVENT	INTO INACTIVE		<input type="checkbox"/>
11/14/2012 14:23:57	INITIAL EVENT	(INA INA23) RECEIVE INACTIVE ASSET		<input type="checkbox"/>
11/14/2012 14:18:52	CLOSED REQUEST	INACTIVE RECEIVAL	86 _Y _INACTIVE _Y _RAZA ANNAM ARAZA _2_	<input type="checkbox"/>
11/14/2012 14:14:49	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	ACQUISITION COST _35000 _0	<input type="checkbox"/>
11/14/2012 14:14:49	INITIAL EVENT	(FIN ANNAMTEST0202) PURCHASE		<input type="checkbox"/>

Timeline Report Record Properties

## USING THE EXCESS MODULE FOR INVENTORY ASSETS

When an asset reaches the end of its active life and is no longer useful, organizations may choose to use the excess module to screen and process their assets for disposal. The excess process includes the creation of **excess receipt request** to transition the active asset into an excess asset. The appropriate party or organization responsible for receiving, reviewing and acting upon requests can either deny, accept or withdraw a request. If accepted, the asset in question becomes an **excess asset**.

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

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

This section discusses how to:

- Request Inventory Asset Excess Receipt
- Withdraw Inventory Asset Excess Receipt
- Manage Denied Inventory Asset Excess Receipt
- Create Excess Asset Reservations

## REQUEST INVENTORY ASSET EXCESS RECEIVAL

A user with the proper role (e.g. inventory clerk, inventory manager,) can create an excess receival request and a manager that oversees the disposal of assets for the organization can generate the excess assets from the receival request. After creating the request, the system can generate an E-mail to notify the requestor and other interested parties.

NOTE: Excess managers cannot create excess receival requests.

### NAVIGATION

- Click Excess
- Click Request Excess Receival
- Click Request Inventory Asset Excess Receival

Request Inventory Asset Excess Receival - asex2120

**Request Information**

Excess in-place? ☐

Pick-up Location \*

Deliver-to Location \*

**Assets**

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

Request No.

Asset Condition

Comment

Additional Information\*

Message

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

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

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

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

**Step 5.** Enter the asset identifier of the inventory asset to excess in the **Identifier** field. Click the Tab key to populate **Manufacturer**, **Model**, and **Official Name**.

**Step 6.** Select the asset condition that best describes the asset's current state.

**Step 7.** Use the **Comment** text box to specify any special circumstances or delivery considerations.

**Step 8.** Double-click in the **Additional Information\*** field to enter any other pertinent information associated with the inactive receival request

**NOTE:** If the **ASSET REQUEST UDF** attribute set is not configured by an Administrator, there will not be any **Additional Information** fields.

**Step 9.** Click the **Save** icon to save the excess receival request. The system generates a **Request No** (Number).

**Example:**

The screenshot shows a software window titled "Request Inventory Asset Excess Receival - asex2120". The window is divided into two main sections: "Request Information" and "Assets".

**Request Information:**

- "Excess in-place?" is checked with a checkbox.
- "Pick-up Location \*" is an empty text field.
- "Deliver-to Location \*" is an empty text field.

**Assets:**

Ok	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> 2	DELL	D333	COMPUTER, TABLET

Below the table, the following fields are visible:

- "Request No" is 184.
- "Asset Condition" is 1 (highlighted in yellow) and "UNUSED - GOOD".
- "Comment" is "IN CUBE".
- "Additional Information\*" is an empty text field.
- "Message" is "Complete".

**Step 10.** Click the **Summary and History** button to view the timeline

USING THE EXCESS MODULE FOR INVENTORY ASSETS

Example:

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

Assets

Identifier  Identifier Type  Parents 0 Children 0 C/AP

Unique Name

Default Location\*

Timeline

Details

☒ Include Events

☒ Include Open Requests

Other Identifiers

☒ Include Resolutions

☒ Include Closed Requests

☒ Include Contract Reports

☒ Include IUID/WAWF

☒ Include Meter Readings

☒ Include Configuration and Kitting

Sort By 1  2  3



WITHDRAW INVENTORY ASSET EXCESS RECEIVAL

If a request was made to excess an asset and that asset can be placed back into service, it can be withdrawn.

Use the **Withdraw Excess Receival Request** screen to withdraw a request to excess an inventory asset.

NAVIGATION

- Click Excess
- Click Withdraw Excess Receival Request

Requests

Ok Request No	Identifier	Manufacturer	Model	Official Name
<input type="checkbox"/>				

Asset Condition

Pick-up Location

Deliver-to Location

Comment

Withdraw Reason

Additional Information\*

Message

- Step 1. Navigate to the **Withdraw Excess Receival Request** screen.
- Step 2. Enter the request number in the **Request No** field.
- Step 3. Click the **Tab** key to populate the screen.
- Step 4. Optionally, enter the reason for withdrawing the request in the **Comment** field.
- Step 5. Click the **Save** icon to withdraw the request

**Example:**

Withdraw Excess Receival Request - asmn2120

Requests

Ok Request No	Identifier	Manufacturer	Model	Official Name
<input checked="" type="checkbox"/> 184	INV 2	DELL	D333	COMPUTER, TABLET

Asset Condition: 1 UNUSED - GOOD

Pick-up Location:

Deliver-to Location:

Comment: IN CUBE

Withdraw Reason: found use

Additional Information\*:

Message: Complete

Step 6. Click the **Summary and History** button to view the timeline

Example:

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

Assets

Identifier

Identifier Type

Parents  0

Children  0

C/A/P

Unique Name

Default Location\*

View Map

Current Identifier  2

Timeline

Details

☒ Include Events

☒ Include Resolutions

☒ Include Contract Reports

☒ Include Meter Readings

☒ Include Open Requests

☒ Include Closed Requests

☒ Include IUID/WAWF

☒ Include Configuration and Kitting

Other Identifiers  INV / 2

Sort By 

1 DATETIME DESC

2 DATETIME DESC

3 DATETIME DESC

Get Records

Datetime	Category	Description	Attributes	Document?
12/11/2012 09:19:35	RESOLUTION	INACTIVE SEND TO EXCESS	FELDMAN DR JOHN A JR JFELDMAN	<input type="checkbox"/>
12/11/2012 09:19:35	CLOSED REQUEST	EXCESS RECEIVAL	184_Y_UNUSED - GOOD_IN CUBE_found use	<input type="checkbox"/>
12/11/2012 07:55:28	ONGOING EVENT	CHANGE LOCATION	ARLINGTON, VA_BUILDING_2	<input checked="" type="checkbox"/>
12/11/2012 07:55:28	ONGOING EVENT	CHANGE USER	BUCCI HON THOMAS A PHD TBUCCI	<input checked="" type="checkbox"/>
12/11/2012 07:55:28	ONGOING EVENT	CHANGE CUSTODIAN	AARON NOAH NAARON	<input checked="" type="checkbox"/>
11/11/2012 15:49:51	ONGOING EVENT	MATERIAL ISSUED	1_100_ASSET CENTER 01_FELDMAN DR JOHN	<input checked="" type="checkbox"/>
11/09/2012 19:19:16	ONGOING EVENT	CHANGE LOCATION	ARLINGTON, VA_BUILDING_1	<input type="checkbox"/>
11/09/2012 19:08:49	INITIAL EVENT	(INV 2) PURCHASE		<input type="checkbox"/>
11/09/2012 19:08:48	ONGOING EVENT	ASSET VALUE/QUANTITY INCREASE	50000000213_100_100	<input type="checkbox"/>
				<input type="checkbox"/>

Timeline Report

Record Properties

## REQUEST EXCESS ASSETS

Excess assets are generated daily, weekly or otherwise depending upon the policies and procedures of the organization. Once generated, excess assets are placed into a review cycle that goes through one or more review periods. The review cycle enables authorized personnel to search for assets that are available for reuse. Review periods are beneficial to the organization because they enable users to find assets that have been designated as reusable excess assets that in many cases, are more cost effective than purchasing a new asset. Depending upon the policies the organization may choose to post a list of excess assets to a web page for users outside of the organization or for those who do not have access to Sunflower. Users within the organization that have access to Sunflower can review the list of excess assets by either using reports or the Asset Search screen.

There are a variety of ways to search for excess assets that are available for use by the organization. The following methods are available to search for available excess assets in the database:

- Use Asset Search (online search)
- Asset Search Report Output
- Excess Asset Report

USE ASSET SEARCH

By using the **Asset Search** screen to find assets that have been designated as excess the organization can (rather than purchasing a new asset) utilize an existing asset that is available for use and place an Excess Asset Reservation with the organization that is storing the unused asset.

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

- NAVIGATION
- Click Mgmt
  - Click Asset Search

The screenshot shows the 'Asset Search - asmn2130' window. In the 'Search Criteria' section, the 'Manufacturer' field is set to 'DELL' and the 'Excess Assets' checkbox is checked. Below this, a table lists search results with columns for Identifier, Manufacturer, Model, and Official Name. The first row is highlighted in blue.

Assets Identifier	Manufacturer	Model	Official Name
EXC JSFTESTEX	DELL	D333	COMPUTER PERSONAL
EXC QPTEST_M_F_A_I_E	DELL	D333	COMPUTER PERSONAL
EXC QPTEST_A_E	DELL	D333	COMPUTER PERSONAL
EXC JSFTESTEX2	DELL	D333	COMPUTER PERSONAL
EXC TSTB368C-RETAG	DELL	D333	COMPUTER PERSONAL
EXC JSFEX01	DELL	D333	COMPUTER PERSONAL

A 'Report' button is located at the bottom right of the results table.

- Step 1.** Navigate to the **Asset Search** screen. The **Asset Search** screen is available from the Agreement, Management, Finance, Inactive and Excess modules.
- Step 2.** Check the **Excess Asset** checkbox to limit the asset search to excess assets. Specify at least one criteria in the **Search Criteria** block.
- Step 3.** Click the **Find** icon to return the results of the **Asset Search** criteria.
- Optionally, click the **Report** button to generate a printable report of the search results.

## ASSET SEARCH REPORT OUTPUT

Enter the reporting criteria to return a report that can be setup as either a PDF or HTML output such as the following example. Any selection criteria that is entered on this screen will be the default values in the HTML based report if clicking the **Report** button after selecting the criteria.

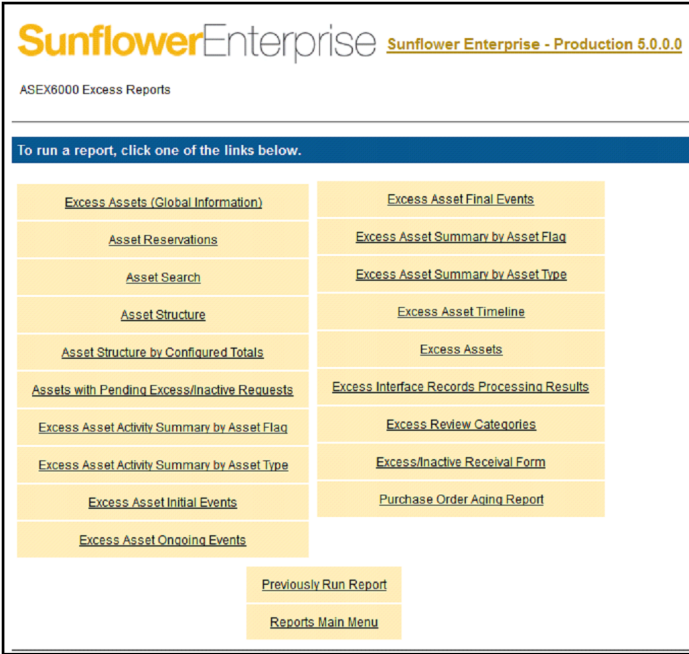
Sunflower Enterprise		Asset Search				Page 2 of 4	
ASMN6120						09/26/2012 13:56	
Identifier	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Acquisition date
EXC 0209		COMPUTER PERSONAL	DELL	D333	9384093284	\$ 5,500.00	01/01/1998
	Steward : EXCESS CENTER Custodian : TWO E X EX02 Phone : 510.223.1221 User : Phone :				Location : AUSTIN, TX :		
EXC JSFTESTEX		COMPUTER PERSONAL	DELL	D333	AS3EOMRIIE	\$ 10,000.00	08/22/2012
	Steward : ASSET CENTER 02 Custodian : Phone : User : Phone :				Location : LIVERMORE, CA BUILDING : EXCESS ROOM : RC		
EXC QPTEST_M_F_A_I_E		COMPUTER PERSONAL	DELL	D333		\$ 1,000.00	09/05/2012
	Steward : EXCESS CENTER Custodian : TWO E X EX02 Phone : 510.223.1221 User : Phone :				Location : LIVERMORE, CA BUILDING : EXCESS ROOM : RC		
EXC QPTEST_A_E		COMPUTER PERSONAL	DELL	D333		\$ 1,000.00	09/05/2012
	Steward : EXCESS CENTER Custodian : TWO E X EX02 Phone : 510.223.1221 User : Phone :				Location : LIVERMORE, CA BUILDING : EXCESS ROOM : RC		
EXC JSFTESTEX2		COMPUTER PERSONAL	DELL	D333	ETSTEST	\$ 10,000.00	09/06/2012
	Steward : EXCESS CENTER Custodian : TWO E X EX02 Phone : 510.223.1221 User : Phone :				Location : LIVERMORE, CA BUILDING : EXCESS ROOM : RC		

EXCESS ASSETS REPORT

Use the **Excess Assets** report to check for available excess assets. To run a report perform the following:

NAVIGATION

- Select Excess
- Select Excess Reports
- or
- Select Reports
- Select Excess Reports
- Select Excess Assets (Global Information)



- Step 1.** Navigate to the **Excess Reports** screen.
- Step 2.** Click the **Excess Assets (Global Information)** report.
- Step 3.** Enter the appropriate parameters to generate the **Excess Asset (Global Information)** report.

Sunflower Enterprise

Sunflower Enterprise - Production 5.0.0.0

Excess Assets (Global Information)

[Excess Reports Menu](#)

Parameters

Display Options

Sorting and Grouping

File Output

Identifiers and Attributes

Catalog

Location

Responsibility and Accountability

User Fields

Manufacturer

DELL

Model

Official Name

Stock Number

Asset Type Category

Asset Type

ASMN6030

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Build 20120914



EXCESS ASSETS REPORT OUTPUT

Review the **Excess Assets (Global Information)** report output to determine if there are any excess assets available for the organization. The following report reveals several excess assets available for redeployment to the organization.

Sunflower Enterprise			Excess Assets (Global Information)				Page 3 of 5		
ASMN6030							09/26/2012 14:01		
Identifier	Type	Flags	Official Name	Manufacturer	Model	Serial Number	Asset Value	Eff Date	
0209			COMPUTER PERSONAL	DELL	D333	9384093284	\$ 5,500.00	09/06/2012	
JSPEX01			COMPUTER PERSONAL	DELL	D333		\$ 1,000.00	09/26/2012	
JSPTSTEX			COMPUTER PERSONAL	DELL	D333	AS3BOMEIIE	\$ 10,000.00	08/22/2012	
			Agreement: LEASE 1999-02-01			Begin Date: 01/01/1999	End Date:		
JSPTSTEX2			COMPUTER PERSONAL	DELL	D333	ETSTEST	\$ 10,000.00	09/06/2012	
			Agreement: LEASE 1999-01-01			Begin Date: 01/01/1999	End Date:		
QPTST_A_E			COMPUTER PERSONAL	DELL	D333		\$ 1,000.00	09/05/2012	
			Agreement: LEASE 1999-01-01			Begin Date: 01/01/1999	End Date:		
QPTST_M_F_A_I_E			COMPUTER PERSONAL	DELL	D333		\$ 1,000.00	09/05/2012	
			Agreement: LEASE 1999-01-01			Begin Date: 01/01/1999	End Date:		
TST8368C-RETAG			COMPUTER PERSONAL	DELL	D333		\$ 100.00	09/24/2012	

After determining the available excess assets, navigate back to the **Create Excess Asset Reservation** screen and submit a request for the desired excess assets.

## CREATE EXCESS ASSET RESERVATIONS

If an organization wants to utilize an excess asset, a user may create an excess asset reservation. The excess manager may review and deploy the asset via a request or deny the request.

Scenario: The following graphic illustrates how to create an excess asset reservation.

### NAVIGATION

- Click Excess
- Click Create Excess Asset Reservation

Asset Reservations				
Date	12/11/2012 09:26:40			
Reserved by	FELDMAN DR JOHN A JR JFELDMAN			Phone 202-222-2222
Organization	[Redacted]			Duration [Redacted]

Assets					
Ok	Identifier	Manufacturer	Model	Official Name	Number of Reservations
<input checked="" 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"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Message [Redacted]

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

**Step 2.** Click the Tab key to populate the screen. The screen automatically populates the **Date**, **Reserved by**, **Phone**, and **Organization** fields (based on login).

**Step 3.** Enter the amount of time (days) for the reservation life span in the **Duration** field.

**Step 4.** Enter the identifier of the excess asset and click the Tab key. The **Manufacturer**, **Model**, and **Official Name** populate.

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

**Example:**

[illegible]

## RETIRE INVENTORY ASSETS

At some point, organizations will no longer be accountable for property. The property may have been:

- Lost
- Scrapped
- Sold
- Destroyed
- Donated
- Exchanged

When the organization is no longer accountable for a piece of property, the inventory asset will be retired by recording a final event. The final event type will be based upon the reason the organization is no longer accountable (i.e. theft, donated, exchanged, etc). In addition, additional information related to the event, such as the authorizing document and event details may be recorded.

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

This section will cover:

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

CREATE AN INVENTORY ASSET FINAL EVENT

The asset final event process is a function that only an Inventory Clerk or Inventory Manager can perform. Multiple assets may be final evented at the same time.

- NAVIGATION
- Click Mgmt
  - Click Create Inventory Asset Final Events

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

- Step 1. Navigate to the **Create Inventory Asset Final Events** screen.
- Step 2. Specify the date of the asset final event. The current date is the default value.
- Step 3. Select the event type from the list of values (LOV) from the **Asset Final Event** field for the inventory asset.
- Step 4. Double-click in the **User Fields**, to open the additional final event information fields.
- NOTE: These fields configured by the administrator. Not all final events have user fields. Save to close this window.
- Step 5. Double-click in the **Document field**, to open the **Maintain Documents** screen and enter the related asset final event document information. **Save** to close this window.
- Step 6. Enter the identifier of the excess asset and click the Tab key. The **Manufacturer**, **Model**, and **Official Name** populate.

NOTE: The **Find** button may be used to locate multiple assets to be retired.

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

Example:

Create Inventory Asset Final Events - asmn2080

Final Events

Date

12/11/2012

Final Event

DONATION

User Fields\*

BRENT ELEMENTARY\_\_WASHINGTON\_\_DC\_\_US\_\_20003

Document\*

CUSTODIAN RECEIPT\_0000000203

Comment

COMPUTERS FOR SCHOOLS PROGRAM

Assets

Ok	Identifier	Manufacturer / Model / Official Name*
<input checked="" type="checkbox"/>	302	DELL_D333_COMPUTER, TABLET
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

Message Complete

Step 8. Click the **Summary and History** button to view the timeline

Example:

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets

Identifier

Unique Name

Default Location\*

View Map

Identifier Type

Parents

Children

C/A/P

Current Identifier

Timeline

Details

☒ Include Events

☒ Include Resolutions

☒ Include Contract Reports

☒ Include Meter Readings

☒ Include Open Requests

☒ Include Closed Requests

☒ Include IUID/WAWF

☒ Include Configuration and Kitting

Other Identifiers

Sort By

1 DATETIME DESC

2 DATETIME DESC

3 DATETIME DESC

Get Records

UUI

Timeline Report

Record Properties

## REMOVE A FINAL EVENT

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

### NAVIGATION

- Click Mgmt
- Click Create Inventory Asset Final Events

The screenshot shows a software window titled "Create Inventory Asset Final Events - asrmn2080". The window is divided into two main sections. The top section, labeled "Final Events", contains several input fields: "Date" (with a calendar icon and the value 12/11/2012), "Final Event" (highlighted in yellow), "User Fields\*", "Document\*", and "Comment". The bottom section, labeled "Assets", contains a table with three columns: "Ok", "Identifier", and "Manufacturer / Model / Official Name\*". There are 10 rows in the table, each with a checkbox in the "Ok" column. At the bottom of the window is a "Message" field.

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

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

**Step 3.** Select the event type from the list of values (LOV) from the **Asset Final Event** field for the inventory asset. In this case, the asset final event type is a transfer.

**Step 4.** Click the **Find** icon to search the database.

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

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

**Step 7.** Click the **Save** icon to remove the final event from the selected asset.



Example:

Create Inventory Asset Final Events - asmn2080

Final Events

Date

12/11/2012

Final Event

DONATION

User Fields\*

BRENT ELEMENTARY\_WASHINGTON\_DC\_US\_20003

Document\*

CUSTODIAN RECEIPT\_0000000203

Comment

COMPUTERS FOR SCHOOLS PROGRAM

Assets

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

Message

Step 8. Navigate through the menu **Mgmt > Inventory Asset Summary and History** to view the timeline

Example:

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets

Identifier

Identifier Type

Parents

Children

C/A/P

Current Identifier

Unique Name

Default Location\*

View Map

Timeline

Details

☒ Include Events

☒ Include Open Requests

Other Identifiers

Sort By 1

2

3

Get Records

☒ Include Resolutions

☒ Include Closed Requests

☒ Include Contract Reports

☒ Include IUID/WAWF

☒ Include Meter Readings

☒ Include Configuration and Kitting

UUI

None Captured

Timeline Report

Record Properties

REACTIVATE INVENTORY ASSETS

Use the **Maintain Inventory Assets** screen to reactivate an asset. This may occur if an item is lost during an inventory campaign and then the item is found at a future point. When an item is reactivated, the user will need to enter a new initial event for the item. The timeline of the asset will show that the organization was not accountable for a period of time between the retirement of the asset and the reactivation of the item.

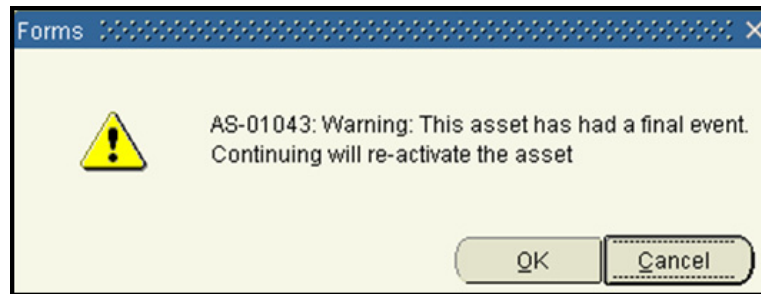
NAVIGATION

- Click Mgmt
- Click Maintain Inventory Asset

The screenshot shows the 'Maintain Inventory Assets' screen. The 'Identifier\*' field is highlighted in yellow. The form includes various input fields for asset details, checkboxes for asset types and status, and a bottom navigation bar with buttons for 'Add Information', 'Commodity', 'Comment / Picture / Attachment', 'Re-Request', 'Asset Configuration', and 'Asset Kit'.

- Step 1.** Navigate to the **Maintain Inventory Asset** screen.
- Step 2.** In the **Identifier** field, enter the asset identifier to re-activate and press Enter to display the asset's information.

NOTE: A prompt message will note that this action will re-activate the asset, thereby reinstating the asset.



Step 3. Press **OK**

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

Step 4. Select the method of acquisition in the **Initial Event** field from the LOV. Common values for Contract Reports customers are Purchased or Furnished.

Step 5. Double Click in the **User Fields** to display any additional fields to capture acquisition information. This is configured by the administrator and is optional.

Step 6. Update any of the other fields as required.

Step 7. Optionally, double click in the **Document** field to associate a reference document to the asset record.

Step 8. Click the **Save** icon to reactivate the asset

Example:

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

Other Identifiers (1) INV / CWM07

Identifier	Type	Existing interest asset	Type	Identifier	Released?
CWM07					Y

Unique Name

Default Location\*

Catalog Identifier\* 105

Manufacturer DELL

Official Name COMPUTER, DESKTOP

Serial Number CWM07

Initial Event FURNISHED

Asset Value\* \$700.00

Asset Condition 4 USED - GOOD

Activity Status RETIRED

Manager SUNFLOWER SYSTEMS

Steward ASSET CENTER 01

Custodian NAARON

User

Location\* ARLINGTON, VA\_\_BUILDING\_\_1\_\_ROOM\_\_A

Document\*

User Fields\*

Global User Fields\*

Commodity Asset

Material

Parents 0 Children 0 C/A/P C

Model GX 720

Drawing No.

User Fields\*

Acquisition Date 11/12/2012

Effective Date 12/11/2012

Responsibility Date

Expected Return Date

Flags\*

Activity Type

Accepted? N

Owner SUNFLOWER SYSTEMS

Rep

First NOAH Mid

First Mid

Add1 Information

Commodity

Comment / Picture / Attachment

Re-Request

Asset Configuration

Asset Kit

Step 9. Click the **Summary and History** button to view the timeline

Example:

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets

Identifier

Identifier Type

Parents

Children

C/A/P

Unique Name

Current Identifier

Default Location\*

View Map

Timeline

Details

☒ Include Events

☒ Include Resolutions

☒ Include Contract Reports

☒ Include Meter Readings

☒ Include Open Requests

☒ Include Closed Requests

☒ Include IUID/WAWF

☒ Include Configuration and Kitting

Other Identifiers

Sort By 

1 DATETIME DESC

2 DATETIME DESC

3 DATETIME DESC

Get Records

Datetime

Category

Description

Attributes

Document?

12/11/2012 09:39:54

CLOSED REQUEST

INVENTORY ASSET ACCEPT

COLLIN STEWARD

☐

12/11/2012 09:39:54

ONGOING EVENT

CHANGE LOCATION

ARLINGTON, VA \_BUILDING\_1\_ROOM\_A

☐

12/11/2012 09:39:54

ONGOING EVENT

CHANGE CUSTODIAN

AARON NOAH NAARON

☐

12/11/2012 09:39:54

ONGOING EVENT

CHANGE STEWARD

ASSET CENTER 01

☐

12/11/2012 09:39:54

ONGOING EVENT

INVENTORY ASSET ACCEPT

☐

12/11/2012 09:39:54

INITIAL EVENT

(INV CWM07) FURNISHED

☐

11/13/2012 01:58:07

RESOLUTION

BARCODE KEY

ARLINGTON, VA HOPKINS SCOTT SHOPKINS

☐

11/12/2012 13:08:59

RESOLUTION

INVENTORY ASSET FINAL EVENT

☐

11/12/2012 13:08:59

FINAL EVENT

(INV CWM07) LOST

☐

11/12/2012 11:44:40

INITIAL EVENT

(INV CWM07) PURCHASE

☐

Timeline Report

Record Properties

## MANAGEMENT REPORTS

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

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.

Sunflower provides the following reports with the Management module:

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

The **Inventory Assets (Global Information)** report shows detail and summary information of accountable assets. Use the **Inventory Assets (Global Information)** report to display accountable asset details.

### **Asset Search Report**

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

### **Asset Structure Report**

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

### **Asset Structure with Configured Totals**

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

### **Inventory Asset Activity Summary by Asset Flag**

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

### **Inventory Asset Activity Summary by Asset Type**

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

### **Inventory Asset Final Events**

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

### **Inventory Asset History**

The **Inventory Asset History** report shows the detailed changes, and who made them, for accountable assets.

### **Inventory Asset Initial Events**

The **Inventory Asset Initial Events** report shows the details of accountable asset initial events (e.g. purchase, construction and transfers).

### **Inventory Asset Interface Processing Results**

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

### **Inventory Asset Ongoing Events**

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

### **Inventory Asset Summary by Asset Flag**

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

### **Inventory Asset Summary by Asset Type**

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



### **Inventory Asset Timeline**

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

### **Inventory Asset Utilization**

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

### **Inventory Assets Pending Acceptance by Age**

The **Inventory Assets Pending Acceptance by Age** report displays a summary of assets awaiting acceptance by age and steward.

### **Inventory Assets Pending Release by Age**

The **Inventory Assets Pending Release by Age** report displays a summary of accountable assets pending release to the initial custodian by age and steward.

### **Inventory Assets with Recently Denied Requests**

The **Inventory Assets with Recently Denied Requests** report shows accountable assets with denied requests.

### **Inventory Assets with Requests**

The **Inventory Assets with Requests** report shows accountable assets with open change steward, custodian, user and location requests.

### **Purchase Order Aging Report**

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

### **High Volume Shipping Interface Processing Results**

Use the **High Volume Shipping Interface Processing Results** report to support the Sunflower PackTrak interface for shipments.