Sunflower PPMS CD 50:
Add and Update Assets

User Guide
## Contents

- Introduction ........................................................................................................................................ 3
- Additional Functionality .................................................................................................................. 3
- Error Handling .................................................................................................................................. 4
- CD 50 Create New Asset ................................................................................................................ 4
  - Duplicate Asset Creation ............................................................................................................. 15
- CD 50 Maintain Asset Detail ........................................................................................................... 16
- Transfers ......................................................................................................................................... 20
  - Request Transfer .......................................................................................................................... 20
  - Accept Transfer ............................................................................................................................ 23
- Generate CD 50 Asset Transaction Report ..................................................................................... 27
Introduction

The Sunflower CD 50 transaction page allows Property Custodian(s) (PCS) the ability to create or update Inventory or Agreement Asset(s).

This Sunflower PPMS CD 50 User Guide provides instructions on how to “Add and Update Assets” through the CD 50 Maintain Assets Transaction Menu.

The CD 50 Maintain Assets Transaction Menu includes:

- Create New Asset CD 50 transaction page to create Inventory or Agreement Assets.
- Maintain Asset Detail CD 50 transaction page to modify Inventory or agreement assets.
- How the PC should approve of Inventory Asset(s) to other NOAA Custodial Area(s) and validation of the transaction page.
- Report creation of all NOAA asset(s) created or updated via the CD 50 transaction page.

Additional Functional Terms & Conditions:

To ensure data integrity and separations of duties and responsibilities, additional functional terms and conditions are as follows:

- Property Custodians cannot update Inventory Assets with an existing Excess Asset record through the Maintain Asset Detail screen – these records are view only.
- Property Custodians can only update Location, User and Attachments on Capital Assets. All other fields are view only.
- When Capital Asset records are created in the Create New Asset screen, i.e., assets $200,000 or more, a NOAA Financial Manager will receive email notification of this addition.
- Property Custodians can add attachments to retired Inventory Assets.
- Property Custodians will only be able to add/update Agreement Assets if they are authorized to transact on those Agreements.
- Property Custodians will not be able to transfer Agreement Assets; PPMB will have to be consulted to conduct these transactions.
- Only Property Custodians will be able to accept transfers.
• Property Custodians and Line Office Representatives will now receive emails on LOANED OUT assets at 30 days from when LOANED OUT assets and five (5) days due back. (If the Activity Status is set to LOANED OUT, the Expected Return Date will determine when the emails are sent.)

**Error Handling**

When an error is encountered, the error is because either a required value was left blank, or a value entered did not meet certain validation requirements. When an error is encountered in a pop-up window, then the PC either has left a required field blank or has entered a value that does not meet NOAA-specific requirements. If an error message appears in red at the top of the screen, the error means the value entered did not meet standard Sunflower validations, or that a value required by Sunflower was left blank.

**CD 50 Create New Asset**

The purpose of the Create New Asset page is to allow Property Custodian(s) the ability to create Inventory and Agreement assets in the Sunflower PPMS. To add a new asset to Sunflower:

1. In order to create Inventory Assets, Property Custodian(s) must be assigned the Inventory Clerk role and have an active Asset Center Representative Organization Contact for the Custodial Area.
2. In order to create Agreement Assets, Property Custodian(s) must be authorized to transact against the Agreement(s).
3. In addition, Property Custodian(s) must enter information in all required fields. Required fields are labeled with a red asterisk.
1. Enter the **CD 50 / 52 Transaction Menu**

2. Click **to create asset**
3. Select **Interest Type** (Inventory Asset or Agreement Asset)

**Note:** When adding **Agreement Assets**, Property Custodians (PCs) are required to select the Agreement. PCs will only see those Agreements they are authorized to transact.

4. Enter **Barcode #** – must begin with CD and have 12 characters
5. Click the **Attachment** button

### Maintain Attachments Barcode # CD1234567891

- **File**
- **Description**

6. Click the **Browse** button to located the file to be attached
7. Then, click the **Add** button.
8. Click on Close to close the Attachment pop up screen
   a. Alternately, click on Delete?, then Save to remove the attachment
9. Enter Serial Number
10. Select Custodial Area from the list of values - Accept the defaults in the pop-up window by placing check marks next to each option.
    a. Note: You will only see the Custodial Areas you are authorized to transact on

b. By accepting the defaults in the pop-up window, the Property Custodian, PAO, Property contact, Region, Personal Organization Code and Line Office fields will automatically populate.
11. Enter Current User
12. Open the Location window and enter Location

13. Enter Manufacturer
14. Enter Model Number

Note: If you do not see the Model Number you need, please stop entering the asset information and submit a Catalog Request Form to the Sunflower Management Center (help desk).
15. **Activity Type** will default to **Agency Owned** – change as needed

16. **Utilization Code** (Activity Status) will default to **In Service** – change as needed

**Note:** When **LOANED OUT** is selected as the **Utilization Code**, PCs must enter an **Expected Return Date** that is a date *after* the **Acquisition Date**. If other Utilization Codes are selected, the **Expected Return Date** field is not available. (See below for example).

17. **Condition Code** – defaults to **4 – Used – Major Repairs not Required**.
**Note:** Please contact your PPMB Line Office Representative if you feel the Condition Code needs to be changed.

18. Enter **Acquisition Date**

**Note:** **Responsibility Date** will default based on the Acquisition Date entered. This date can be updated in the CD50 to Maintain Asset screen.

19. **Initial Event** will default to **Purchase** – change as needed

20. **Flags** – select a value as needed. All items considered “Sensitive” would automatically receive the Sensitive flag once the record is saved.

**Note:** If you have any questions related to the purpose of the flags, please contact your Line Office Representative before selecting a value.

21. Open the **Asset Value** User Defined Fields (UDFs)
Each mandatory value (*) within the Asset Value Components window completed before saving the changes:

(a) Enter Fiscal Year (four digits)
(b) Enter Project (seven characters or less)
(c) Enter Fund Code (three to five characters)
(d) Enter Program (numeric, format should be NN-NN-NNN)
(e) Select Organization from the list of values - do not select an Organization with the word END in it
(f) Enter User Code or accept default of 000000
(g) Select Object Class Code from the list of values
(h) Enter Task (three characters)
(i) Enter Bureau or accept default of 14

Note: To add additional Asset Value Component, click the Add button and complete the information in the second Asset Value Component section. The PC may add as many Asset Value Components as needed, and all the values will add up to the total Asset Value on the asset record.
Note: To delete an Asset Value Component, click on the box above the component, then click the **Delete Checked** box. An example of a completed Asset Value Component window is shown above.

22. Select a Document Type
23. Enter a Document # - **NOTE** This number must match the document number on the UPR
24. Depending upon the type of asset, users may have to enter information in the User Defined Fields at the bottom of the screen before saving (look for the red asterisks to determine which fields are required). The examples below show vehicles, which have several mandatory fields to enter:
### FSC Code 2310 (Passenger Motor Vehicles)

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Organization Code</td>
<td>54-08-02-0002-00-00-00-02ANZ22</td>
</tr>
<tr>
<td>Common Name</td>
<td></td>
</tr>
<tr>
<td>DoC Capitalized Asset</td>
<td></td>
</tr>
<tr>
<td>Vehicle Weight</td>
<td></td>
</tr>
<tr>
<td>Warranty Begin Date</td>
<td>11/2012</td>
</tr>
<tr>
<td>Model Month/Year</td>
<td>11/2012</td>
</tr>
<tr>
<td>Number of Cylinders</td>
<td>06</td>
</tr>
<tr>
<td>Transmission</td>
<td>AUTOMATIC</td>
</tr>
<tr>
<td>Verified?</td>
<td></td>
</tr>
<tr>
<td>Armor Level</td>
<td>N/A</td>
</tr>
<tr>
<td>Law Enforcement</td>
<td>NO LAW ENFORCEMENT</td>
</tr>
<tr>
<td>Executive Fleet Designation</td>
<td></td>
</tr>
<tr>
<td>Green House Gas Score</td>
<td>2</td>
</tr>
<tr>
<td>Fleet Card Number</td>
<td></td>
</tr>
<tr>
<td>Line Office</td>
<td></td>
</tr>
<tr>
<td>Document Received Date</td>
<td></td>
</tr>
<tr>
<td>Export Control Class. No.</td>
<td></td>
</tr>
<tr>
<td>Fuel Tank Size (gallons)</td>
<td></td>
</tr>
<tr>
<td>Warranty End Date</td>
<td></td>
</tr>
<tr>
<td>Body Style</td>
<td>SUV</td>
</tr>
<tr>
<td>Vehicle Color</td>
<td>BLUE</td>
</tr>
<tr>
<td>License Tag Number</td>
<td>G42-52312</td>
</tr>
<tr>
<td>Primary Fuel Type</td>
<td>GASOLINE HYBRID</td>
</tr>
<tr>
<td>GSA Vehicle Type</td>
<td>LB SUV 4X2</td>
</tr>
<tr>
<td>EISA Section 141 Acquisitions</td>
<td></td>
</tr>
<tr>
<td>VAM Exempt</td>
<td></td>
</tr>
<tr>
<td>Equipment Code</td>
<td></td>
</tr>
</tbody>
</table>

**Important Note:** Users do not have to enter information in the following four fields, as the information for these fields will default when the user saves the record:

- Armor Level – will default to N/A
- EISA Section 141 Acquisitions – will default to Yes
- Executive Fleet Designation – will default to No
- VAM Exempt – will default to COV
FSC Code 2320 (Trucks and Tractors, Wheeled)

25. Once all required User Defined Fields are completed, (as necessary), click the Save button at the bottom.

Note: You should receive a message at the top saying Inventory/Agreement Asset CDXXXXXXXXXXX Created

INVENTORY ASSET CD1234567891 Created

(*Required)
26. Click the **Reset** button at the bottom to duplicate an asset

### Duplicate Asset Creation

Once a new asset record has been saved, PCs have the opportunity to create duplicate records. For example, if a PC were adding ten asset records for the same type of laptop, the duplication feature would be utilized. Once the previous asset record is saved:

1. Enter **Barcode #** – must begin with CD and have 12 characters
2. Open **Attachment** field – the attachment from the previous asset is available for you to copy to the new asset.

   3. To copy the attachment from the previously saved asset, click the **Copy** radio button
      a. Otherwise browse for a new file
   4. Click the **Copy** button to copy the attachment from the previous asset

**Note:** The new attachment shows above the document attached to the previous asset.
5. Click Close to close the Attachment window
6. Enter Serial Number
7. Update other information as needed, such as User and Location
8. Click the Save button at the bottom

**Note:** You should receive a message at the top saying *Inventory/Agreement Asset CDXXXXXXXXXX Created.*

**CD 50 Maintain AssetDetail**

Once Inventory or Agreement asset records have been created, PCs will use the **CD 50 Maintain Asset Detail** screen to update asset records.

Property Custodians can update all fields except the following:

1. Barcode
2. Interest Type
3. Initial Event
4. UPR Identifier

**Note:** PC(s) can request access to the Agreement Module through their Property Manager.

Users listed as Property Contacts on asset records should only be able to update the following fields:

1. Location
2. User
3. Attachments

**Note:** PC(s) can request access to the Agreement Module through their Property Manager.
1. Enter the **CD 50 / 52 Transaction Menu**
2. Click to maintain asset

![Sunflower Enterprise - Production 5.0.0.0](image)

Maintain Asset Detail
Marvel Kenneybrew

<table>
<thead>
<tr>
<th>Interest Type</th>
<th>INVENTORY ASSET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barcode #</td>
<td>CD1234567891</td>
</tr>
</tbody>
</table>

![Query button](image)

3. Enter an existing Barcode # and click on Query button – the existing asset information should appear

![Sunflower Enterprise - Production 5.0.0.0](image)

Maintain Asset Detail
Marvel Kenneybrew

<table>
<thead>
<tr>
<th>Interest Type</th>
<th>INVENTORY ASSET</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barcode #</td>
<td>CD1234567891</td>
</tr>
<tr>
<td>Serial Number/VIN/HIN</td>
<td>SM-1234567891</td>
</tr>
<tr>
<td>Current Custodial Area</td>
<td>540VN220 Requested Custodial Area</td>
</tr>
<tr>
<td>Property Custodian</td>
<td>KENNEYBREW MARVEL JR 62662</td>
</tr>
<tr>
<td>P A O*</td>
<td>540VN Region* NOAA-HQS</td>
</tr>
<tr>
<td>Property Contact</td>
<td>62662 Name KENNEYBREW MARVEL JR 62662</td>
</tr>
<tr>
<td>Current User *</td>
<td>572791 Name LEWIS LEON 572791</td>
</tr>
<tr>
<td>Location:*</td>
<td>SILVER SPRING, MD BUILDING 950MC4 ROOM 8610</td>
</tr>
<tr>
<td>Manufacturer*</td>
<td>360 HERO</td>
</tr>
<tr>
<td>Model Number*</td>
<td>65UNHUB-67U</td>
</tr>
<tr>
<td>Description</td>
<td>UNDERWATER SCUBA KIT</td>
</tr>
</tbody>
</table>
4. Update fields as needed
   a. As noted above, the following fields are the only fields that should be available for persons listed as Property Contacts on asset records
      i. Location
      ii. User
      iii. Attachments
   b. Property Custodians will not be able to update Barcode, Interest Type, Initial Event, and UPR Identifier, but will be able to update o

5. Click the Save button at the bottom
   a. You should receive a message at the top saying Inventory/Agreement Asset CDXXXXXXXXXX Modified
Transfers

The **CD 50 Maintain Asset Detail** screen is also used to request and accept transfers.

**Request Transfer**

1. Click on the **CD 50 / 52 Transaction Menu** link.
2. Click the **maintain asset** button.

3. Enter the **Barcode #** and click the **Query** button.
4. Enter the requested Custodial Area in the Requested Custodial Area field and hit Tab.

5. Select Custodial Area from the list of values - Accept the defaults in the pop-up window by placing check marks next to each option. Then click OK. **NOTE** If the pop-up does not immediately display look to see if it opened in another window.
Note: A message will appear asking if you would like to create a transfer request to the Custodian of that Custodial Area.

Would you like to create a transfer request to 540TVN200. An email will be sent to KENNEYBREW MARVEL JR 62682

Create Request  Cancel

6. Click the Create Request button.

Note: A message will appear indicating the request has been successfully created, and the requested PC will receive an email notifying them of the pending transfer request.

Request Sucessfully Created

Ok

Accept Transfer
To accept or deny the Transfer Request enter the Maintain Asset screen.
1. Click on the **CD 50 / 52 Transaction Menu** link.

2. Click the **maintain asset** button.
3. Enter the **Barcode #** for the transfer, and click the **Query** button.

4. Click on the **Action** button next to the **Requested Custodial Area**.
5. Click the Approve button to approve the transfer, or the Deny Request button to deny the transfer.

6. Update other information as needed, such as the User, Location and Organization Code.
Generate CD 50 Asset Transaction Report

The Asset Transaction Report displays a number of transaction types, such as:

- Inventory and Agreement Asset Additions
- Asset Changes
- Transfers
- Asset Value Changes
- Retirements

This report displays the:

- Barcode
- Line Office
- Custodial Area
- Name of person who conducted the transaction
- Transaction date/time
- Transaction Type

From the main menu:
1. Click on the **Sunflower Enterprise Reports** link

1. Click on the **User Defined Reports** link
2. Click on the **NOAA Specific CD50/52 Reports** link
3. Click on the **CD-50 Asset Transaction Report** link

4. As needed, select a **Line office**

5. Enter a **From Date** and a **To Date** **This is mandatory**

6. As needed, sort by either of the following:
   a. Custodial Area
   b. Barcode
   c. Line Office
   d. Transaction Date
   e. User Name

7. Click on the **Submit** button

8. Select your **Output Format**
   a. Acrobat
   b. HTML
   c. Text file(s) export (Excel, Lotus 1-2-3, Access...)
9. Click on the **Execute** button. The report will show transactions such as transfers, asset additions, asset changes, and asset value changes.