Sunflower PPMS CD 50:

Add and Update Assets

User Guide
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Introduction

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

The Sunflower PPMS CD 50 User Guide provides instructions on how to “Add and Update Assets” through the CD 50/52 Transaction Menu.

The CD 50/52 Transaction Menu includes functions to:

- Create Inventory or Agreement Asset(s);
- Maintain and modify Inventory or Agreement asset(s);
- To approve Inventory Asset(s) to other NOAA Custodial Area(s) and validation of the transaction page.
- Report NOAA asset(s) created or updated via the CD 50 transaction page.

Additional Functional Terms & Conditions:

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

- Property Custodian(s) cannot update an Inventory Asset(s) with a current Excess Asset record, through the Maintain Asset Detail screen, because Inventory Asset records under the maintain assets function are view only.
- Property Custodian(s) can only update Location, User and Attachments of Capital Assets, all other fields under this function are view only.
- When Capital Asset records are created in the “Create Asset” screen, i.e., assets $200,000 or more, the NOAA Financial Manager will receive an email notification. However, Property Custodian(s) can add attachments to retired Inventory Assets.
- Property Custodian(s) can add/update Agreement Assets, only if authorized to transact Agreements asset(s).
- Property Custodian(s) are authorized to transfer Agreement Assets. However, the PC(s) should contact PPMB to approve and execute the transaction(s).
- Only Property Custodian(s) can accept transfers.
• Property Custodian(s) and Line Office Representative(s) will now receive emails notifications related to LOANED OUT assets, 30 days and five (5) days before asset(s) are due back. (When the Activity Status is set to LOANED OUT, the Expected Return Date will determine when the email notifications are sent.)

Error Handling
When an error is encountered, the error message indicates 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, 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 indicates the value entered did not meet standard Sunflower validations, or a value required by Sunflower was left blank.

CD 50 Create New Asset
The purpose of the Create Asset page is to allow Property Custodian(s) the ability to create Inventory and Agreement asset(s) in the Sunflower PPMS. To add a new asset to Sunflower:

1. Property Custodian(s) must be assigned the Inventory Clerk role and have an active Asset Center Representative Organization Contact for the Custodial Area, in order to create Inventory Asset(s).
2. Property Custodian(s) must be authorized to transact against the Agreement(s), in order to create Agreement Asset.
3. Additionally, 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:** Property Custodians PC(s) are required to select the Agreement, when adding Agreement Assets. PC(s) will only see those Agreement(s) they are authorized to transact.

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

6. Click the **Browse** button to located the file to be attached;
7. Then, click the **Add** button.
8. Click on **Close** to exit 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 a check mark next to each option.
   a. **Note**: The Custodial Area(s) authorized to transact will be listed.

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

13. Enter **Manufacturer**;
14. Then, Enter **Model Number**.

**Note:** If the required Model Number is not listed, stop entering the asset information, and submit a Catalog Request Form to the Sunflower Management Center (Help desk).
15. The Activity Type will default to Agency Owned – change as needed.
16. The Utilization Code (Activity Status) will default to In Service – change as needed.

Note: When LOANED OUT is selected as the Utilization Code, the PC(s) must enter an Expected Return Date; i.e., a date after the Acquisition Date. The Expected Return Date field is not available, if other Utilization Codes are selected. (See below for example).

17. Condition Code – defaults to 4 – Used – Major Repairs not Required;
Note: Please contact your PPMB Line Office Representative, if the default Condition Code should be changed.

18. Enter the Acquisition Date;

Note: The Responsibility Date will default, based on the Acquisition Date entered. The Responsibility Date can be updated in the CD 50 to Maintain Asset screen.

19. The Initial Event will default to Purchase – change as needed.
20. Select the Asset Flags value as required. “Sensitive” assets will automatically receive the Sensitive flag once the record is saved.

Note: Please contact your Line Office Representative before selecting a value, if there are any questions related to the purpose of the flags.

21. Open the Asset Value User Defined Fields UDF(s);
The Mandatory values (*) within the Asset Value Components window must be completed before saving the changes:

- Enter **Fiscal Year** (four digits);
- Enter **Project** (seven characters or less);
- Enter **Fund Code** (three to five characters);
- Enter **Program** (numeric, format should be NN-NN-NN-NNN);
- Select **Organization** from the list of values - do not select an Organization with the word **END**.
- Enter **User Code** or accept default (000000);
- Select **Object Class Code** from the list of values;
- Enter **Task** (three characters);
- Then, Enter **Bureau** or accept default of (14).

**Note:** To add additional Asset Value Components, click the **Add** button and complete the information in the second Asset Value Component section. The PC(s) may add as many Asset Value Components as needed. The values should equal the total Asset Value of 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. Then, Enter a Document #.

** NOTE** Likewise, the document 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>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></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></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></td>
</tr>
<tr>
<td>Primary Fuel Type</td>
<td>GASOLINE HYBRID</td>
</tr>
<tr>
<td>GSA Vehicle Type</td>
<td>LD 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:** Information in the following fields is not required and will save to the default value when the record is saved:

- Armor Level – defaults to N/A
- EISA Section 141 Acquisitions – I defaults to Yes
- Executive Fleet Designation – I defaults to No
- VAM Exempt – defaults to **COV FSC Code 2320 (Trucks and Tractors, Wheeled)**
25. Click the **Save** button at the bottom, once the required User Defined Fields are completed, (as required).

**Note:** Inventory/Agreement Asset CDXXXXXXXXXXX created will appear at the top of the screen.

26. Click the **Reset** button at the bottom to duplicate an asset;
Duplicate/Multiple Asset Creation

PC(s) have the opportunity to create duplicate records, once a new asset record has been saved. For example, if two (2) or more asset records for the same type of laptop are added, the duplication feature is utilized.

When 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 to copy to the new asset record.

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 is shown above the document attached to the previous asset.
5. Click Close to exit 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: Inventory/Agreement Asset CDXXXXXXXXXXX created will appear at the top of the screen.

To add multiple asset records of the same make and model, please click on the link below for guidance related Multiple Asset Creation.


CD 50 Maintain Asset Detail

PC(s) will use the CD 50 Maintain Asset Detail screen to update asset records, once Inventory or Agreement asset records have been created.

Property Custodian(s) 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 the Line Office Property Manager (PM).

Users listed as Property Contacts on asset records can only update the following fields:
1. Location
2. User
3. Attachments

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

1. Enter the **CD 50 / 52 Transaction Menu**
2. Click **to maintain asset**

3. Enter an existing **Barcode #** and click on **Query** button – the asset information should appear.
4. Update fields as needed
   a. As noted above, the following fields are the only fields that are available for the Property Contact(s) on the asset record(s).
      i. Location
      ii. User
      iii. Attachments
   b. Property Custodian(s) cannot update the Barcode, Interest Type, Initial Event, and UPR Identifier under the Maintain Asset function. However, PC(s) can view only under this function.

5. Click the **Save** button at the bottom
   a. An **Inventory/Agreement Asset message**: CDXXXXXXXXXX modified will appear at the top of the screen.
Transfers

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

**Request Transfer**

Note: Property Custodian(s) now have the ability to transfer assets (Inventory Assets only) to other Department of Commence Bureau's.
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 Custodial Area in the Custodial Area field and hit Tab.
5. Select **Custodial Area** from the list of values. Then click **OK**.

6. **NOTE** If the pop-up does not immediately display, check for the display in another window.
7. An additional pop-up will appear to create a transfer request.

![Transfer Request Pop-up]

8. Click the **Create Request** button.

**Note:** A message will appear to indicate the request has been successfully created. The PC(s) will receive an email notification of the pending transfer request.

![Success Message]

**Accept Transfer**

Enter the Maintain Asset screen, to accept or deny the Transfer Request.

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. Click the **Close** button

**Note:** A message will appear to indicate the request has been successfully closed. The sending PC(s) will receive an email notification of the accepted request.
7. Information updates, such as the Line Office, Location, or Personal Organization Code are no longer required. The information from the accepting custodial area is automatically updated in the asset record fields.
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

In addition, the Asset Transaction 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 **Sunflower Enterprise Reports**

1. Click on **User Defined Reports**
2. Click on **NOAA Specific CD50/52 Reports**

    **Assets with Excess/Inactive Requests**
    - Assets with Final Event Requests
    - Assets with Change Detail Requests
    - Reactivated Assets Details

    **Edit Inventory Asset Interface Report**
    - Edit Inventory Asset Interface Progress Report

    **Physical Inventory Certification Status Report**
    - CD-50 Asset Transaction Report
3. Click on CD-50 Asset Transaction Report

4. Select a **Line office** as required;

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

6. Sort by either of the following, as required:
   a. Custodial Area
   b. Barcode
   c. Line Office
   d. Transaction Date
   e. User Name

7. Click on the **Submit** button;

8. Select the **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; i.e. transfers, asset additions, asset changes, and asset value changes.
END OF USER GUIDE
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