

# Sunflower PPMD CD 52: Retiring Assets Job Aid

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## To Request Retirement of an Asset(s)

Access the CD 52 **to request retirement of asset** screen by navigating to: CD 50 / 52 Transaction Menu > to request retirement of asset.

1. Select the **Interest Type** (Agreement, Excess or Inventory)
2. Select the **Final Event Type**
3. Enter the **Detailed Circumstances and Justification** for retirement.
4. Add an **Attachment**, as needed, by clicking on the **Attachment** button and browsing for a document to attach.
5. Complete the **User Defined Fields**. Any field with a red asterisk is required.
6. For Recycled Final Events only, all users must select **SCRAP** as the Condition Code in the UDF section.  
**Requests cannot be saved until you acknowledge that all assets on the Recycled request are SCRAP.**
  - In addition to the mandatory fields on Recycled requests, you must enter the following information:
    - i. Vendor Address
    - ii. Vendor Phone Number
    - iii. Location of Property
  - The following fields will be auto-populated once you enter an asset in the bottom section of the screen. (This information will then populate the printed NOAA 37-50 document):
    - i. NOAA Line Office
    - ii. NOAA Organization Code
    - iii. Name of Property Custodian
    - iv. Custodial Area of Assets
    - v. PC's Phone Number
    - vi. Name of PAO
  - **Note: Name of Vendor Signing 37-50** will be completed in the "approval" screen, once the NOAA PC gets the 37-50 signed by the vendor.
7. At the bottom of the screen enter a **Barcode** and hit **tab** to see the asset information.
  - **Note 1:** All assets on one request must be assigned to the same Custodial Area. If any assets have a Custodial Area that differs from the Custodial Area on the first asset listed, users will receive an error message and the asset in question will be removed from the request.
  - **Note 2:** To manually remove assets from the request, click the radio button next to the **Barcode** of the asset you wish to remove, and then click the **Remove** button.
  - **Note 3:** To add additional lines to the asset section, click on the **Add** button.
  - **Note 4:** If you are using Google Chrome as your browser, you may notice that previously entered Barcode Numbers begin to appear as you type. You can ignore these, or (as needed), select one if you wish to request retirement on that asset.
  - **Note 5:** Optionally, to add assets to a request, users can also click on the **Enter Query** button to query off of parameters such as Custodial Area, User, Location, Manufacturer, Model,

Description, or Serial Number. Once you have entered your parameters, click on **Execute Query**. (Instructions on this can be found below).

8. Enter additional assets as needed, so long as they are in the same Custodial Area. Below is a screenshot of NOAA assets entered onto a Recycled request. Note that several of the other UDFs have been populated, such as NOAA Line Office and NOAA Organization Code:
9. Click the **Save Draft** button to save the request.
  - **Note 1:** Once saved, **OK** will appear next to each asset on the request, and users will see a pop-up message providing them with the Request Number and reminding them to the “Submit” the request, or to write down the Request Number to query at a later time. The request will not be submitted until the Submit Request button is clicked, so if your intent is to immediately submit the request, click **OK**, then **Submit Request**.
  - **Note 2:** Users will also receive an email notification when drafts are saved. This notification will contain the Request Number, and a note that all requests not “submitted” within 30 days will be purged from the system.
  - **Note 3:** Each asset on the request will have the same Request Number. In this way, approvers will be able to mass approve (or deny) all assets on one request.
10. Once the draft of the request has been saved, click **Submit Request** to officially submit the retirement request. Once submitted, a Timeline Event for OPEN REQUEST – FINAL EVENT will be logged for each asset on the request. The next approver in line will also be notified of the retirement request via email.
  - **Note:** If you receive an error message after submitting – for example in the event an asset you entered does not have the required User Defined Fields assigned – you can fix the error, and then click the **Back to Entry page** button, just above the top asset. This will allow you to essentially ‘reset’ the asset portion of the request screen, then re-save the request without having to re-enter all the data at the top of the screen.
11. Once a request is submitted, as needed click on either the **Print CD-52** or the **NOAA 37-50 Form** buttons to print the CD-52 or 37-50 document. The NOAA 37-50 document will be available on Recycled Final Event requests only (see below for example).

### ***Query for Assets on a Request***

1. An alternate method to manually typing assets into the bottom section of the screen is to query assets. Click on the **Enter Query** button to query for assets.
2. Once a query is entered, a list of assets meeting the query criteria will appear.
3. Click on the box under **Request** to save assets on that request, (or to save all assets to the request, click the **Select All** button), then click the **Save** button.
  - **Note:** A green **Ok** will appear next to each asset saved to the request, and you will receive a message with your Request Number reminding you to then ‘submit’ the request.
4. Remember to **Submit Request** if you are ready to do so.

## Query Existing Retirement Requests

Once a request has been saved **but not officially submitted**, users can query the request and add assets or delete assets. (Once requests have been officially submitted, requesters cannot do anything on this screen.) To query an existing request navigate to CD 50 / 52 Transaction Menu > to request retirement of asset.

1. Click on the **Existing Request** radio button.
2. Enter the existing **Request Number**.
3. Click on the **Query Request** button. The existing request will appear.
4. To add assets to an existing request:
  - a. Add assets below the last asset on the request. As needed, click the **Add** button above the first asset to generate additional rows.
5. To remove assets from the existing request:
  - a. Click on the box next to the **Barcode** of the asset you wish to remove, and then click the **Remove** button.
- **Note:** No Timeline event will be shown on the Summary and History screens for assets removed from requests that have not been submitted. It will be as if a request for retirement was never made.
6. Once all assets have been added/removed, click the **Save Draft** button.
7. If you are ready to official submit the retirement request, click on the **Submit Request** button. This will create a Timeline Event for OPEN REQUEST – FINAL EVENT for each asset on the request, and the next approver in line will be notified of the retirement request. All screens will then look like those above once a request is submitted.
  - **Note:** Each asset will have the same Request Number. In this way, approvers will be able to mass approve (or deny) all assets on one request.
8. Click on the **Print CD-52** or **NOAA 37-50 Form** button, as needed, to print the CD-52 or 37-50 document. (The 37-50 document is used by NOAA only for Recycled Final Event requests).

## Approve Retirement Requests

Once a request has been saved, approvers can query the request by navigating to CD 50 / 52 Transaction Menu > to accept/deny retirement of assets. Remember that when approving, every asset on the request will be approved. **Print out the NF 37-50 only after PPMB has approved the first time.**

1. Enter either the **Request Number** or a **Barcode Number** of one of the assets on the request, and click on the **Submit** button.
  - **Note:** The request should appear, and all the assets on the request should be listed at the bottom.
2. Review the **Attachments** as needed by clicking on the **Attachment** button.
3. Review the CD-52 or 37-50 documents by clicking on the **Print CD-52 Form** or **Print NOAA 37-50 Form** buttons (NOAA 37-50 button only available on RECYCLED requests).
4. Click on the **User Fields** box to review the information contained within the User Defined Fields. Approvers can make updates to the UDFs, as required.

5. Click on **Submit** to submit any changes to the UDFs. These UDFs will appear on the Timeline of any approved retirement requests.
  - **Note: NOAA PCs approving RECYCLED requests:** please ensure the vendor signing the 37-50 prints his or her name legibly on the printed 37-50 document – if PPMB cannot read the name of the vendor on the attached 37-50, they may reject your retirement request.
  - **Note: NOAA PCs uploading the signed 37-50 for Recycled requests,** the **Name of the Vendor** who signed the 37-50 must be entered here so the RPMO can complete the approval of the request.
6. If you are the next approver in line to approve the request your name will be highlighted in yellow. To approve all assets on the request, click on the **Accept All** radio button next to your name, enter **Comments**, and then **Save**. Comments shall remain visible for all approvers in the hierarchy.
  - **Note 1:** If there is another approver in line, that approver will be emailed indicating a request needs to be acted upon.
  - **Note 2:** Once the final approver in the hierarchy approves, each asset's Timeline will show a CLOSED REQUEST – COMPLETED Timeline event, as well as a FINAL EVENT for whichever Final Event Type was selected at the time of request.

## Deny Retirement Requests

Once a request has been saved, approvers can query the request by navigating to CD 50 / 52 Transaction Menu > to accept/deny retirement of assets. Remember that when denying, every asset on the request will be denied.

1. Enter either the **Request Number** or a **Barcode Number** of one of the assets on the request, and click on the **Submit** button.
  - **Note:** The request should appear, and all the assets on the request should be listed at the bottom.
2. If you are the next approver in line to approve the request your name will be highlighted in yellow. To deny all assets on a request, click on the **Deny All** radio button next to your name, add **Comments**, then **Save**. Comments shall remain visible for all approvers in the hierarchy.
  - a. When approvers save a denial, they shall receive the message: **“Are you sure you want to deny retirement for all assets on this request?”** Users will be able to select **“OK”** or **“Cancel”**.
    - **Note 1:** If assets are denied, each asset's Timeline will show a CLOSED REQUEST – DENIED Timeline event, the date/time the request was closed will appear, and the Closed Reason (if entered) will appear from the Comments entered next to the approver's name.
    - **Note 2:** Once denied a request cannot be re-used. Requesters should submit a new request, as needed.
    - **Note 3:** The status at the top of the request will change to **Closed: Denied**.

- **Note 4:** All previous approvers shall be emailed indicating the request has been closed as DENIED.

## Withdraw Assets from Retirement Requests

Once a request has been saved, approvers can query the request by navigating to CD 50 / 52 Transaction Menu > to accept/deny retirement of assets.

1. Enter either the **Request Number** or a **Barcode Number** of one of the assets on the request, and click on the **Submit** button.
  - **Note:** The request should appear, and all the assets on the request should be listed at the bottom.
2. If you are the next approver in line to approve the request your name will be highlighted in yellow. To withdraw assets, click on the radio button next to the appropriate assets(s), enter a **Withdraw Comment**, and then click the **Withdraw Checked** button.
  - **Note 1:** If an asset is withdrawn from a request, the asset will appear crossed out on the request, and the Timeline will show a CLOSED REQUEST – WITHDRAWN Timeline event. The Timeline will also show the date/time the request was closed, along with any Withdraw Comments that were entered (see below screenshots for example).
  - **Note 2:** If assets on a request are being withdrawn for different reasons, users should withdraw one asset at time, and enter separate **Withdraw Comments** for each asset. In this way, the Summary and History of each asset will show its specific **Withdraw Comment**, however the approval screen will only show the last comment entered.
  - **Note 3:** If all assets on a request are withdrawn, the entire requests **Status** will be updated to **Withdrawn** and the entire request will be CLOSED.
  - **Note 4:** All previous approvers shall be emailed indicating the request for that asset has been closed as WITHDRAWN.
  - **Note 5:** Once an asset is withdrawn from a retirement request, users will have to submit new retirement requests to get the asset retired (i.e., once withdrawn that asset is no longer on that request, so new requests must be made.)

## Summary and History

Users can access the various (Inventory, Agreement, Excess) Summary and History screens to review information about retirement requests. From Sunflower's main menu, navigate to Sunflower Enterprise Forms > Mgmt > Inventory Asset Summary and History. (Use Agree and Excess modules to view Summary and History for Agreement and Excess Assets).

1. Enter the **Barcode Number** and tab.
2. To view the status of a request, click on the Request Timeline Event, then the **Record Properties** button.
  - **Note:** This will tell you whether the request was COMPLETED, DENIED, EXPIRED, OVERRIDDEN or WITHDRAWN; and who the request was closed by.
3. Click on the magnifying glass next to the **Attributes** to see the **Closed Date/Time** and **Closed Reason**.

## Resync Approvers

If NOAA PPMB staff update an approver while another is on vacation, (for example), approvers can then 'resync' the approver list so the new approver can process requests. This will change the name of any approvers who have *not* already approved a request. (Non-NOAA approvers do not have to use this functionality, as anyone who is a Contact of the Bureau/Region Organization can approve a request.) Once a request has been saved, approvers can query the request by navigating to CD 50 / 52 Transaction Menu > to accept/deny retirement of assets.

1. Click **Resync Approvers**.
  - **Note:** The user will get a message asking if you'd like to update your list of approvers.
2. Click **OK**. A message will appear indicating the resync operation is complete. The approver list will then change.

## Assets with Final Event Requests Report

The **Assets with Final Event Requests report** displays the status of assets Final Event requests, whether open or closed (approved, denied, expired or withdrawn). From the main menu:

1. Click on the [Sunflower Enterprise Reports](#) link.
2. Click on the [User Defined Reports](#) link.
3. Click on the [NOAA Specific CD50/52 Reports](#) link.
4. Click on the [Assets with Final Event Requests](#) link.
5. Select the desired parameters.
6. Click on the **Submit** button.
7. Select your **Output Format**.
  - a. Acrobat
  - b. HTML
8. Click on the **Execute** button. The report will show the status of Final Event requests based on the parameters selected.