

ROLE MANAGEMENT FORM INSTRUCTIONS

The Sunflower Role Management Form is used by the Property Management Officer (PMO) to request the addition, modification or retirement of a Sunflower (PPMS) login ID. This form allows for multiple entries. To input another row, simply tab in the last cell and a new row will be created.

Please fill out all fields that are not shaded on the form on page 2. All fields are required. There are four tables in the form, one for each of the following DOC property roles: Property Custodian, Property Accountability Officer, Property Management Officer and Query.

Requested By: Requester's name. Note: only PMOs can submit this form.

Date: Date of request

Email: Requestor's email address

Phone: Requestor's phone number

Action: The type of request needed for the requested entry: **Add, Mod: Previous, Mod: Current and Delete**

Name: Provide the person's last name, first name, and middle initial.

Org/Bureau: Provide the organization/bureau the person is employed under.

Effective Date: Provide date this change will be effective

Custodial Area: Provide the custodial area the person will be responsible managing asset records for

Primary Contact? Indicate if the person is the primary contact for the Custodial Area. The Primary Contact's name is displayed in the Prop Custodian field on the asset record

Excess Clerk Role (Manager for PMO) (Y/N) Mark Y if the person will need access to the Excess module. Only users who manage excess assets will need access to the Excess module

Finance Clerk Role (Y/N) Mark Y if the person will need access to the Finance module. Only users who manage capital assets in the PPMS Finance module will need this access

Inventory Clerk Role (Y/N) Mark Y if the person will need access to the Management module. This is the module where all assets are entered and managed for the Bureaus.

Review Clerk Role (Manager for PAO and PMO) (Y/N) Mark Y if the person will need access to the Review module. The Review Clerk role will allow a PC to correct errors after resolutions are uploaded as well as run reports. The Review Manager module allows users to set up and manage Review Campaigns as well as resolve errors and run reports.

Query (Not for PC, PAO or PC) (Y/N) Mark Y if the person only needs access to view records and run reports.

Submit the completed form to the Sunflower Helpdesk (sunflowerhelpdesk@doc.gov).



ROLE MANAGEMENT FORM

PMO Name: _____
 Email Address: _____

Date: _____
 Telephone Number: _____

The Sunflower Role Management Form is used to request the addition, modification or retirement of a PPMS User ID.

ADD/MODIFY/DELETE RECORD: PROPERTY CUSTODIAN									
ACTION: Add Mod: previous Mod: current Delete	NAME (Last Name, First Name, MI)	Bureau	Effective Date	Custodial Area	Primary Contact?	Excess Clerk Role (Y/N)	Finance Clerk Role (Y/N)	Inventory Clerk Role (Y/N)	Review Clerk Role (Y/N)

ADD/MODIFY/DELETE RECORD: PROPERTY ACCOUNTABILITY OFFICER									
ACTION: Add Mod: previous Mod: current Delete	NAME (Last Name, First Name, MI)	Bureau	Effective Date	Custodial Area	Primary Contact?	Excess Clerk Role (Y/N)	Finance Clerk Role (Y/N)	Inventory Clerk Role (Y/N)	Review Manager Role (Y/N)

ADD/MODIFY/DELETE RECORD: PROPERTY MANAGEMENT OFFICER									
ACTION: Add Mod: previous Mod: current Delete	NAME (Last Name, First Name, MI)	Bureau	Effective Date	Custodial Area	Primary Contact?	Excess Manager Role (Y/N)	Finance Clerk Role (Y/N)	Inventory Clerk Role (Y/N)	Review Manager Role (Y/N)

ROLE MANAGEMENT FORM

ADD/MODIFY/DELETE RECORD: QUERY (View only, no update rights)					
ACTION: Add Mod: previous Mod: current Delete	NAME (Last Name, First Name, MI)	Bureau	Effective Date	Custodial Area	Query (Y/N)