

NOAA Personal Property Management Branch Manual Dashboard User Guide

1. Open the Excel Pivot File.



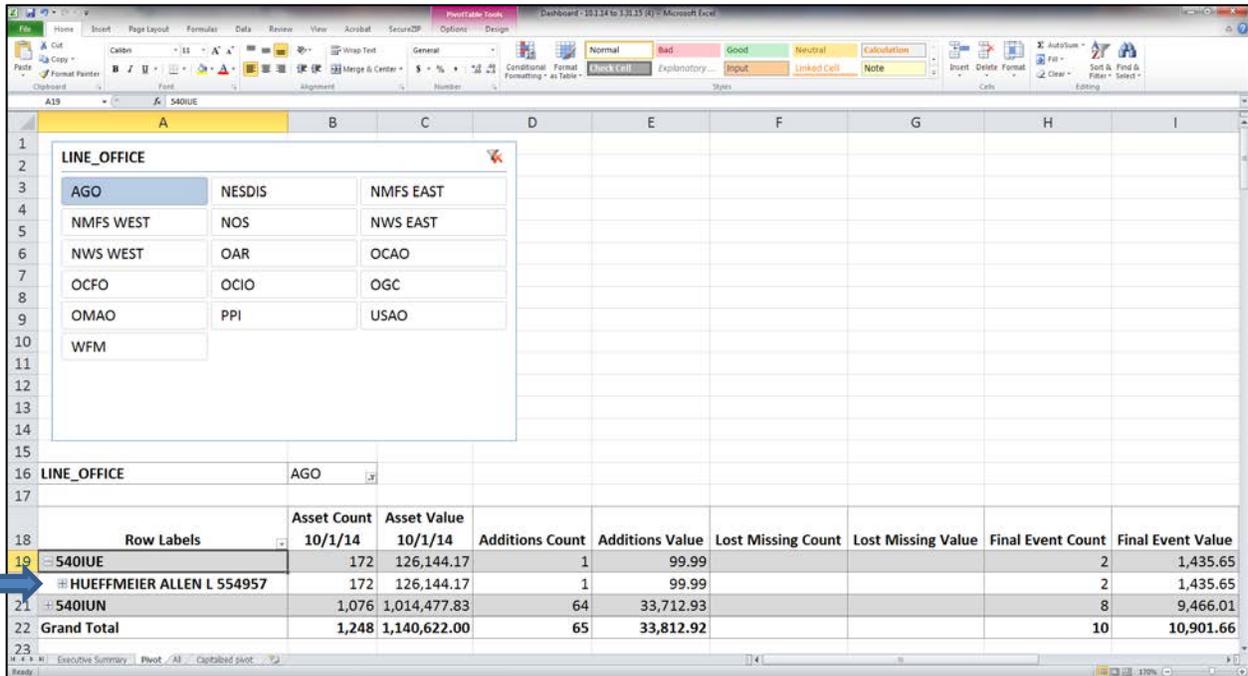
2. The Dashboard is displayed.

Row Labels	Asset Count 10/1/14	Asset Value 10/1/14	Additions Count	Additions Value	Lost Missing Count	Lost Missing Value	Final Event Count	Final Ev
54001E	846	91,135,452.74	55	704,721.88			3	
54001W	2,638	305,467,891.75	107	444,677.24			38	
54002M	745	5,874,904.09	26	228,176.96			29	2
54002W	3,576	14,064,446.77	107	257,192.36			95	2
54003E	5,014	40,899,467.60	116	201,201.39	54	59,532.55	367	8

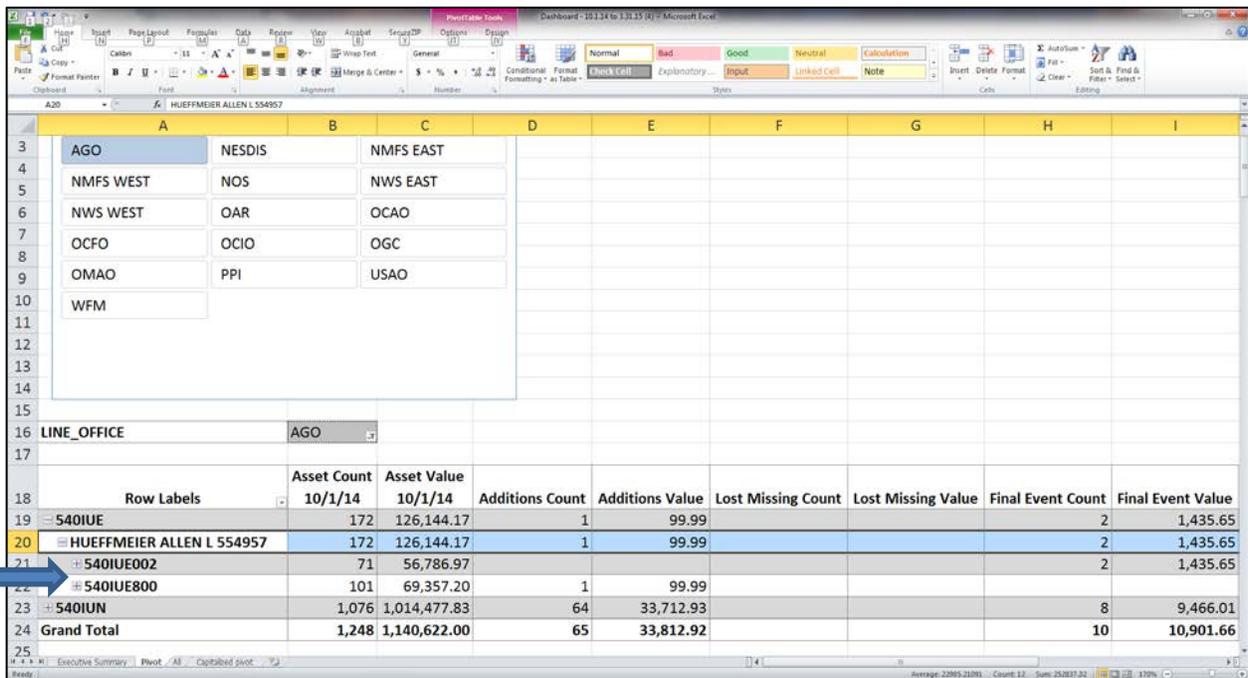
3. Click on the appropriate Line Office to display the Property Accountability Officer (PAO) Area(s) and Asset Transaction Details.

Row Labels	Asset Count 10/1/14	Asset Value 10/1/14	Additions Count	Additions Value	Lost Missing Count	Lost Missing Value	Final Event Count	Final Event Value	QC Missing Notifications	QC I Noti
5401UE	172	126,144.17	1	99.99			2	1,435.65		0
5401UN	1,076	1,014,477.83	64	33,712.93			8	9,466.01		1
Grand Total	1,248	1,140,622.00	65	33,812.92			10	10,901.66		1

4. Click on the PAO Area to display the PAO.



5. Click on the PAO's name to display the corresponding Custodial Area(s).



- Click on the Custodial Area and a list of all Property Custodians (PCs) under this PAO will be displayed, as well as the PCs total active asset count.

Row Labels	Asset Count 10/1/14	Asset Value 10/1/14	Additions Count	Additions Value	Lost Missing Count	Lost Missing Value	Final Event Count	Final Event Value
540IUE	172	126,144.17	1	99.99			2	1,4
HUEFFMEIER ALLEN L 554957	172	126,144.17	1	99.99			2	1,4
540IUE002	71	56,786.97					2	1,4
MCCONNELL MICHAEL 540513	71	56,786.97					2	1,4
69	71	56,786.97					2	1,4
540IUE800	101	69,357.20	1	99.99				
540IUN	1,076	1,014,477.83	64	33,712.93			8	9,4
Grand Total	1,248	1,140,622.00	65	33,812.92			10	10,9

- Drill down further, if necessary, to select additional PC(s) and scroll across to view the transaction activity.

Row Labels	Asset Count 10/1/14	Asset Value 10/1/14	Additions Count	Additions Value	Lost Missing Count	Lost Missing Value	Final Event Count	Final Event Value
540IUE	172	126,144.17	1	99.99			2	1,4
HUEFFMEIER ALLEN L 554957	172	126,144.17	1	99.99			2	1,4
540IUE002	71	56,786.97					2	1,4
MCCONNELL MICHAEL 540513	71	56,786.97					2	1,4
69	71	56,786.97					2	1,4
540IUE800	101	69,357.20	1	99.99				
SCIBONA GARY 562175	101	69,357.20	1	99.99				
102	101	69,357.20	1	99.99				
540IUN	1,076	1,014,477.83	64	33,712.93			8	9,4
Grand Total	1,248	1,140,622.00	65	33,812.92			10	10,9

Dashboard Executive Summary Sample

NOAA Personal Property Summary
FY2016 (12.01.15 - 12.31.15)

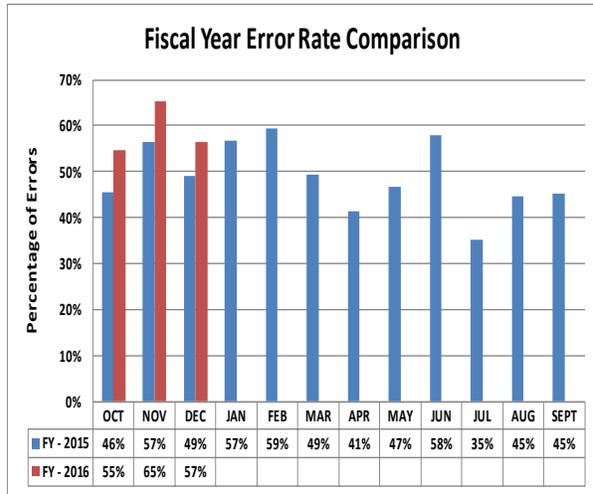
Line Office	Number of PAOs	Number of PCs	Asset Count	Asset Value	Number of Capitalized Assets	Value of Capitalized Assets	Total Number of Additions	Total Number of Barcodes	Number of Barcodes with Errors	Total Number of Errors	Error Rate	Number of Lost Missing	Value of Lost Missing
AGO	2	6	1257	\$1,094,045.60									
NESDIS	9	42	22948	\$5,847,777,048.15	132	\$5,411,888,375.60	414	414	147	240	36%		
NMFS EAST	18	58	17863	\$55,731,055.86	16	\$11,776,355.50	63	63	35	66	56%	3	\$885.94
NMFS WEST	19	65	21377	\$71,877,289.12	15	\$9,202,218.40	290	289	172	404	60%	13	\$6,172.94
NOS	8	50	19527	\$120,359,310.72	48	\$43,513,340.58	54	54	24	74	44%	5	\$20,631.75
NWS EAST	12	116	40236	\$680,696,121.70	680	\$524,034,083.47	666	660	445	1251	67%	14	\$325,448.59
NWS WEST	10	102	28555	\$782,249,203.50	775	\$686,484,603.19	247	247	193	550	78%	14	\$47,215.55
OAR	16	32	16997	\$131,838,530.30	49	\$53,466,560.00	162	162	87	136	54%		
OCAO	8	16	1126	\$6,172,924.27	3	\$3,477,535.81	1	1	1	2	100%		
OCFO	1	3	1593	\$8,976,485.14	6	\$6,070,824.79	27	27	1	2	4%		
OCIO	1	15	4656	\$78,137,259.45	26	\$41,956,781.82	40	40	17	43	43%		
OGC	10	9	987	\$1,292,734.27						0			
OMAO	5	40	7880	\$697,922,669.11	93	\$660,233,373.84	78	77	25	38	32%		
PPI	1	1	90	\$66,167.97						0			
USAO	1	10	1099	\$1,477,541.47			15	15	13	16	87%		
WFM	1	3	732	\$528,451.40			1	1	0	0	0%		
TOTAL	122	568	186923	\$8,486,196,838	1,843	\$7,452,104,053.00	2,058	2,050	1,160	2,822	57%	49	\$400,354.77

QC Error Notification Notes

** Errors below are based on the number of errors per barcode **

Error Rate is based on the number of barcodes QC'd with errors

Incorrect Record Errors			Untimely Entry Errors			Missing Documentation Errors		
Month	FY - 2015	FY - 2016	Month	FY - 2015	FY - 2016	Month	FY - 2015	FY - 2016
OCT	1012	1190	OCT	599	1006	OCT	236	397
NOV	762	1173	NOV	376	1490	NOV	119	455
DEC	583	839	DEC	444	1419	DEC	111	564
JAN	1018		JAN	585		JAN	196	
FEB	583		FEB	623		FEB	88	
MAR	631		MAR	188		MAR	139	
APR	638		APR	276		APR	155	
MAY	672		MAY	224		MAY	142	
JUN	775		JUN	467		JUN	230	
JUL	949		JUL	637		JUL	450	
AUG	1082		AUG	1572		AUG	1121	
SEPT	1153		SEPT	1266		SEPT	787	
% of Total Errors	47%	46%	% of Total Errors	35%	39%	% of Total Errors	18%	15%



DASHBOARD LEGEND	
Total Number of Additions:	The total number of additions extracted from the Sunflower CD50 Transaction Report
Total Number of Barcodes:	The total number of barcodes reviewed by the Quality Control Team
Total Number of Barcodes with errors:	The total number of barcodes that were cited by the Quality Control Team
Error Rate:	The total number of barcodes that were cited divided by the total number of barcodes reviewed by the Quality Control Team
Total Number of errors	The total number of errors cited within the data range for each individual barcode (i.e. Missing, Incorrect, Untimely)

Total number of PAOs and PCs – Total sum of all PAOs and PCs by line office that have transactions associated with them in Sunflower. Some transactions do not have a PAO/PC associated with the custodial area. This data is generated from the Organizational Performance Report in Sunflower.

Asset Count and Asset value – The actual balance of all assets in Sunflower as of the date range selected for the dashboard. This data is generated from the Organizational Performance Report in Sunflower.

Total count and value of Capitalized Assets – The sum of all Capitalized assets and their values by line office as of the date range selected. This data is generated from the Organizational Performance Report in Sunflower, pulling from the financial data module.

Total Number of Additions – The sum of additions by line office for the date range selected. This includes all additions from the inventory and agreement module generated from the CD50 Asset Transaction report in Sunflower.

Total Number of Barcodes – The total number of barcodes reviewed by the Quality Control team. This includes all additions from the inventory and agreement module generated from the CD50 Asset Transaction report in Sunflower, **excluding additions by LORs and PPMP Team Leads**.

Total Number of Barcodes with Errors – The total number of Barcodes that were cited by the Quality Control team based on the barcodes that were reviewed. Each barcode is counted once for having an error, despite the amount of errors that were cited. This data is generated from the QC Ongoing Events Report in Sunflower. Keep in mind, the QC team reviews transactions from the previous day(s) on the actual business day of review.

See example below:

QC Review Date	Transaction Dates
Thursday 01/14/16	Wednesday 01/13/16
Monday 01/04/16	Thursday 12/31/15 – Sunday 01/03/16 (Friday 01/01/16 holiday)
Monday 02/01/16	Friday 01/29/16 – Sunday 01/31/16

Total Number of Errors – The total number of error types for each barcode. Each barcode can have up to 3 types of errors (Incorrect Record, Untimely or Missing Documentation).

Error Rate Percentage – The total number of barcodes with errors divided by the total number of barcodes reviewed by the quality control team.

See example below:

Total number of Barcodes	Total Number of Barcodes with errors	Error Rate Percentage
NWS 10	NWS 5	$5 / 10 \times 100 = 50\%$
OAR 50	OAR 7	$7 / 50 \times 100 = 14\%$

Total count and value of Lost Missing – Sum of all lost missing assets by line office as of the date range selected. This data is generated from the Organizational Performance Report in Sunflower.

Questions & Answers

Q: What do you consider an acceptable error rate?

A: 20% is an acceptable error rate.

Q: After I correct an Incorrect Record Notification, will the QC Ongoing Summary count decrement by 1?

A: No, because the error existed at the time the Quality Control was performed.

Q: I have been asked by several PCs whether approval was obtained from WFMO to officially use this as a method to evaluate custodians.

A: This is a PPMB performance tracking tool, you would need to discuss this with the WFMO if you want to use this as a method of evaluation.

Q: Are you going to show how to drill down within the dashboard?

A: Yes, the drill down was displayed during the webinar.

Q: We are not getting reconciled invoices fast enough to be timely. We are not always getting suitable packing slips. In those cases how do we avoid errors?

A. Work with your PM, PAO and Budget office to find a way to streamline your processes.

Q: What if PCs are busy with other duties?

A: This an internal issue to discuss with your Supervisor.

Q: So how will the dashboard be used by NOAA?

A: The Dashboard will provide an overview of performance for your Line/Staff Office. The Dashboard will also allow Property Managers and Supervisors to view individuals' performance on property specific performance Critical Elements.

Q: What about instances when it is awarded by contract, however the invoice simply doesn't come in time?

A: If an invoice does not come in time, consider using one of the other three documents to support acquisition cost. The Contract/Purchase Order or packing slips are also acceptable documentation to support acquisition cost.

Q: is there an ability to drill down to the PAO level?

A: Yes. Click on the appropriate Line Office to display the Property Accountability Officer (PAO) Area(s) and Asset Transaction Details, and then click on the PAO Area to display the PAO.

Q: NWS might need to negotiate with NWSEO to use in performance.

A. This is an internal NWS issue.

Q: I have three INCORRECT RECORD NOTIFICATIONS in my QC Ongoing Summary. What is an incorrect record notification? What errors cause this notification?

A: An Incorrect Record Notification is an error code which identifies that the proper documentation is not attached to support or the attachment contradicts at least one of the following User Defined Fields: acquisition cost, acquisition date, description of personal property, fund code, manufacture, model number, OCC, organization code, program code, project code, serial number, tag number, task code, vin number.

Q: Is there a way to check to see what errors were corrected?

A: Yes. This data can be generated from the QC Ongoing Events Report in Sunflower and selecting the Status of "cleared". In the barcode record, under Inventory Asset Summary and history the timeline will show the letter 'C' meaning cleared, next to the error and the QC history block will show the date, time, person who corrected the error and the initial error. If under the Inventory Asset Summary and history the timeline shows the letter 'Y', it means the error has not been updated /corrected.

Q: Will untimely errors ever show cleared?

A: No.

Q: Why are the PCs getting penalized for errors like incorrect OCCs, etc...? This is acquisition and budget issue.

A. PPMB's responsibility is to provide notification to the L/O or S/O and Pc's must follow-up with the Budget/Finance Office for DLAs, and complete OCC corrections in Sunflower. PCs need to engage their acquisition and budget personnel to ensure the correct OCCs are being used for purchases. The OCC link is below:

http://www.pps.noaa.gov/forms_guides/guides_aids_tools/accountable_property_and_object_class_codes.html

Q: My QC Ongoing Summary says I have 3 incorrect record notifications. Where do I go to find the barcodes for these three? I do not see them in my QC Ongoing Event report.

A: In order to see the barcodes that have errors, refer to the "Barcodes W/ Errors" tab in the Dashboard report. In addition, you can go to Sunflower and run the user defined "Ongoing Events Report," select the date range and select the Ongoing Event type of "Incorrect Record Notification" which gives all the barcodes with those errors for a selected time frame.

Q: Will it be used in SES performance?

A: This is an internal decision.