

# Property Custodian Online Resolution Inventory Procedures

## Annual Inventory Instructions

This instruction provides step-by-step procedures to obtain the annual inventory listings, how to conduct the annual inventory, and how to record the inventory results as resolutions in Sunflower. The Review Campaign name is provided in the annual inventory announcement letter published by the NOAA PMO.

### To generate the inventory listings

Property Custodian (PC) login to Sunflower  
Select “Sunflower Enterprise Reports”



The screenshot shows a web interface with a blue header bar containing the text "To enter, click one of the the links below." Below the header are six yellow buttons, each containing a red underlined link: "Sunflower Enterprise Forms", "Sunflower Enterprise Reports", "Sunflower Enterprise HTML Transaction Pages", "Stock Asset Management", "Search Attachments and Comments", and "CD 50 / 52 Transaction Menu".

In the Sunflower Assets Reports Menu, select “Review Reports”



The screenshot shows a web interface titled "ASUT6000 Reports Main Menu". Below the title is a blue header bar with the text "To access a report menu, click one of the links below." Below the header are two columns of yellow buttons, each containing a red underlined link. The left column contains: "Agreement Reports", "Contract Reports", "Management Reports", "Sentry Reports", and "Finance Reports". The right column contains: "Inactive Reports", "Excess Reports", "Review Reports", "IT Component Reports", and "Administration Reports". Below these columns are two more yellow buttons: "User Defined Reports" and "Previously Run Report".

Select “Review Campaign Base Assets”  
PCs will select the applicable “Review Campaign”  
Select Interest Type “INVENTORY ASSET”  
Enter the Custodial Area Number

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**ASRV6010 Review Campaign Base Assets**

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**How Would You Like to Select the Assets that Appear on the Report?**

Review Campaigns   
2005 OS MIDYEAR  
2006 LARRY SCRIPT TEST  
2006 NESDIS ANNUAL INVENTORY  
2006 NMAO ANNUAL INVENTORY  
2006 NMFS ANNUAL INVENTORY  
2006 NOS ANNUAL INVENTORY  
2006 NTIA MIDYEAR

Interest Type

Bureau or Region

Property Accountability Office

Cust Area

Select Resolution Types “Open”  
Click “Submit”

User

Site/Off-Site Type  Stlv1 Type  Stlv1 Identifier  Stlv2 Type  Stlv2

Location

Resolution Types   
Open  
AGREEMENT ASSET IDENTIFIER CHANGE  
AGREEMENT ASSET FINAL EVENT  
AGREEMENT ASSET INITIAL EVENT  
ASSIGN COMPONENT  
BARCODE KEY  
BARCODE SCAN

Select “Acrobat format”

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**ASRV6010 Review Campaign Base Assets**

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**Choose an output format**

Acrobat    HTML    Text file export (Excel, Lotus 1-2-3, Access...)

Press  to run the report with the following parameters

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**Selection Criteria: 96849**

<b>Selected by</b>	<b>Value</b>
Review Campaign	2006 NESDIS ANNUAL INVENTORY
Interest Type	INVENTORY ASSET
Bureau or Region	
Property Accountability Office	
Cust Area	54016N344
Include Cust Area child Organizations	N
Description	

Click "Execute"  
Print the report.

### **Options for the advanced user:**

PCs may generate a text file by selecting "Text file export (Excel, Lotus 1-2-3, Access...)." The system will give you the option to save the text file and import into the desired application.

### **Conducting an Inventory**

Prior to the inventory, the PC should become familiar with the scope of the inventory; the definition of items which are accountable. Define the physical boundaries of the inventory; identify any organizational boundaries on a floor plan. PCs should use the Review Campaign Base Asset Report as a list of accountable items (sorted by barcode number.) If you use room numbers, a second report sorted by location is very useful in identifying items of interest.

PCs will conduct a physical sweep of the organization's area and initial the list for each sighted barcode. All off-site equipment that can be moved (e.g. computers, PDAs, etc.)

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will be brought on-site for existence verification, and, if necessary, installation of security updates, etc. Property Custodian will use NOAA Form 3740 (Hand receipts) and the Sunflower Current User Field to monitor accountable personal property maintained both on and off site. The Review Campaign Base Assets Report should be annotated with all inventory adjustments. PCs should screen the inventory findings for property associated with the UPR.

When the PC encounter untagged accountable property, the PCs will apply a barcode label and record a full description of the item; description, Manufacturer, model and serial number. If the PCs locate tagged accountable property which is not listed on the Review Campaign Base Assets Report, PCs will record a description of these assets and treat them as 'found' property.

PCs will use the following steps in reconciliation process:

### **Un sighted Assets**

- Circulated a list of **un sighted assets** within the organization to locate the asset or collect information related to the disposition of the asset.
- Screen all transfers, excess, and loan documentation
- Screen all hand receipts.
- Screen all Computer Help desk Logs.
- Contact the last known user.
- Review the last time assets were inventoried or sighted.
- Check to see if CD-52 Final Event Requests are pending.
- Submit Online CD-52 Final Event Request Delete – Lost or Stolen
- PCs will annotate the Final Event Request number on the Review Campaign

Base Assets Report

- **Record Declared Unaccounted Resolutions**

### **Tagged, Unmatched Assets**

- Reviewed the **tagged, unmatched assets** against Sunflower Records to identify whether a record exists and if they belong to another organization.
- If matched, the PCs will need to determine whether the asset should be transferred into the organization.
- PCs will submit an online Change Asset Detail Request (CAD) for assets to be transferred.
- PCs will annotate the barcodes and CAD Request Numbers on the Review Campaign Base Assets Report
- PCs will submit an Online CD-50 “Request to Create New Asset,” if the barcodes are not in Sunflower
- PCs will attach the acquisition documentation or submit Found Personal Property Certification for barcodes are not in Sunflower
- PCs will annotate the barcodes and Create New Asset Request Numbers on the Review Campaign Base Assets Report

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## Untagged "Found" Assets

- PCs will submit an Online CD-50 "Request to Create New Asset," if the barcodes are accountable **untagged "found" assets**.
- PCs will attach the acquisition documentation or submit Found Personal Property Certification for barcodes are not in Sunflower
- PCs will annotate the barcodes and Create New Asset Request Numbers on the Review Campaign Base Assets Report
- These assets are not part of the Base Campaign.

## Tagged, Sighted Assets

- PCs will annotate or check sighted assets Review Campaign Base Assets Report
- PCs will annotate location changes and /or Current Users for sighted assets on the Review Campaign Base Assets Report
- PCs will use the Annotated Review Campaign Base Assets Report to record inventory resolutions in Sunflower.

## Recording Inventory Results

Recording resolutions for the assets in Sunflower ensure that its assets are accounted for during a review campaign and provide an electronic history of the asset accountability.

## Online Declarative Resolutions or Online Physical Resolutions

PC should use the Sunflower HTML pages to process the inventory resolutions. Select "HTML Transaction pages" to record Online Declarative Resolutions or Online Physical Resolutions.

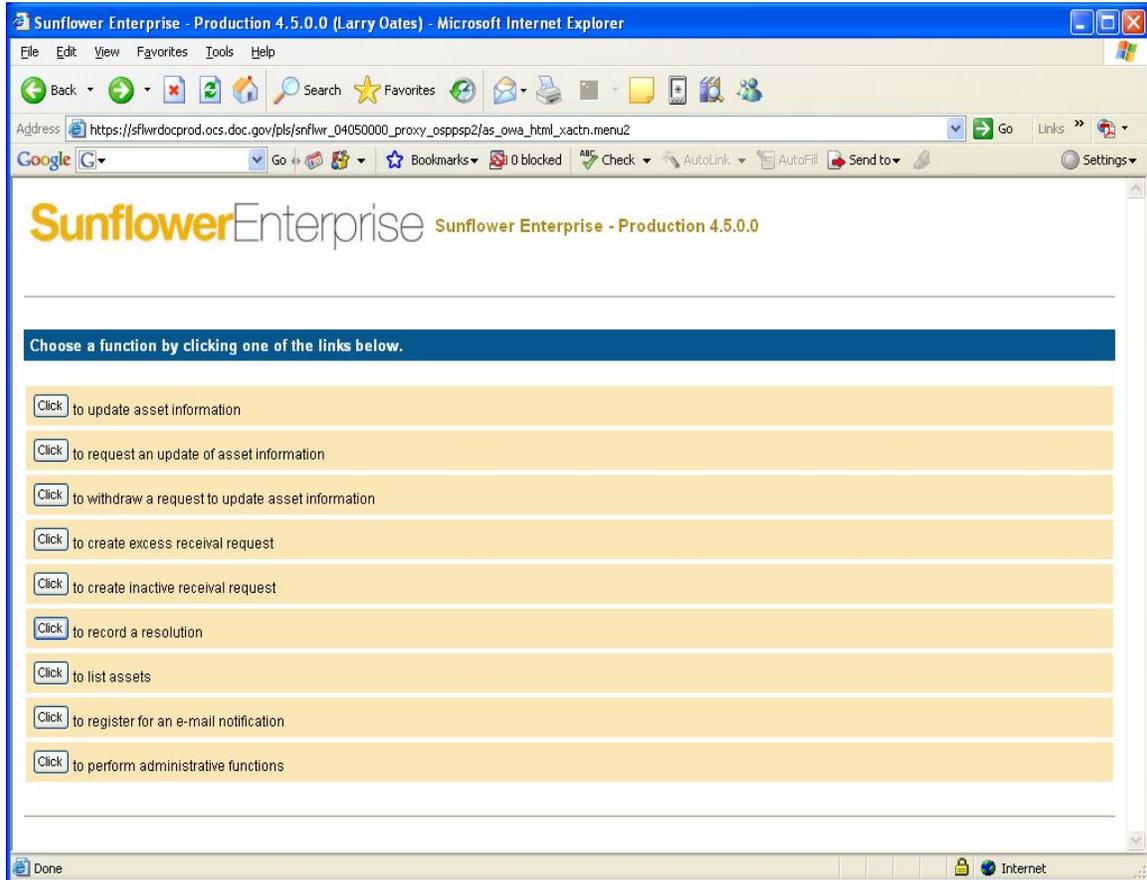


To enter, click one of the the links below.

- [Sunflower Enterprise Forms](#)
- [Sunflower Enterprise Reports](#)
- [Sunflower Enterprise HTML Transaction Pages](#)
- [Stock Asset Management](#)
- [Search Attachments and Comments](#)
- [CD 50 / 52 Transaction Menu](#)

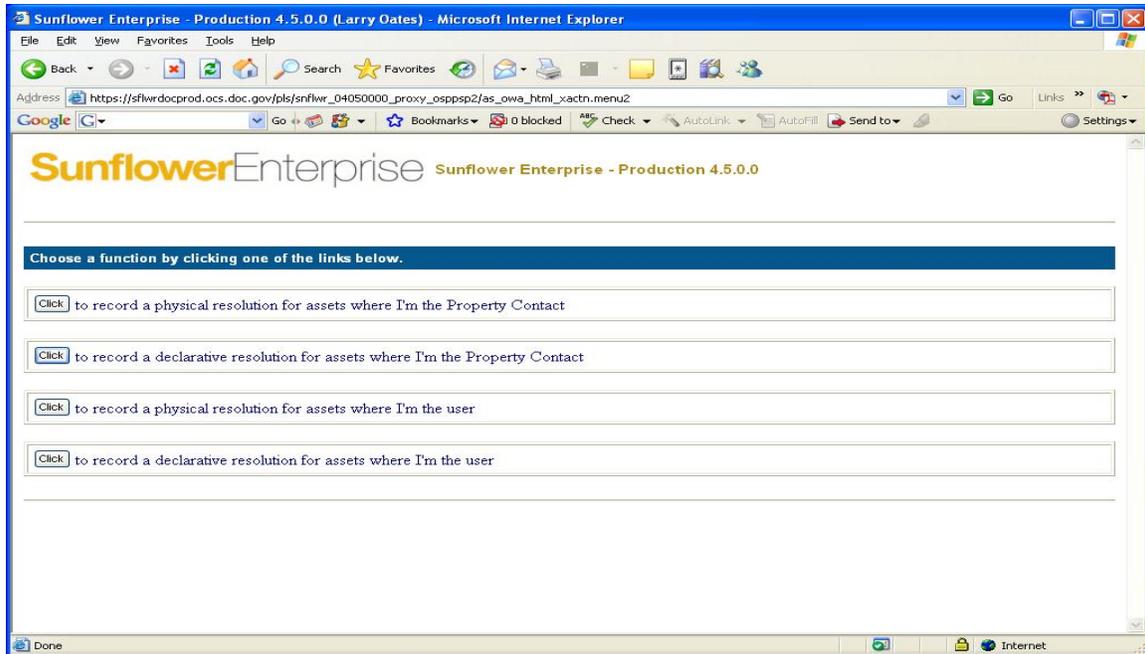
# Property Custodian Online Resolution Inventory Procedures

Select “to record a resolution”



PC will click on “to record a declarative resolution for assets where I’m the Property Contact” or “to record a physical resolution for assets where I’m the Property Contact”

# Property Custodian Online Resolution Inventory Procedures



## Online Declarative Resolutions

- NOAA Property Custodians will use this resolution for all property sighted that does not require a location change.
- NOAA Property Custodians will use this resolution for property with excess receivable request numbers.
- NOAA Property Custodians will use this resolution for property with Final Events Request **other than** Lost or Stolen property (i.e., returned to the vendor, trade-in, and cannibalized.)
- The Excess Receivable Request Number or Final Event Request Number must be annotated on the Annotated Inventory Listing.
- NOAA Property Custodians will also use this resolution for assets that you cannot see but you know exist. In some cases, the assets may be inaccessible because it is located at an off-site location or has been loaned out. These assets may be accounted by the documentation.

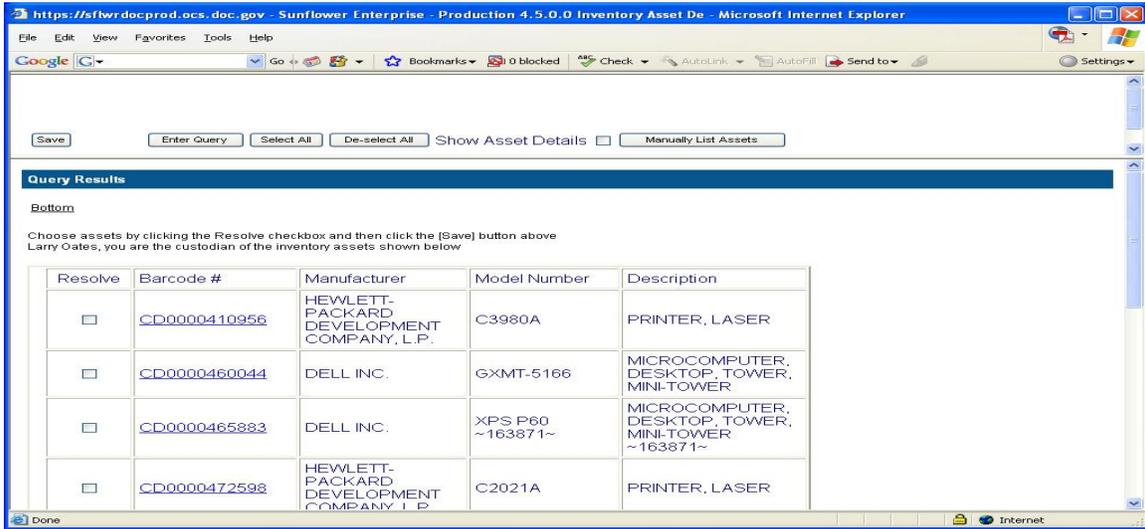
## Online Physical Resolutions

- NOAA Property Custodians will use only this resolution if there is a change in the property location.
- NOAA Property Custodians must enter the complete location of the property ( i.e. Site, Building and Room if applicable)
- The location change must be annotated on the Annotated Inventory Listing.
- NOAA Property Custodians will also use this resolution for those assets that you cannot scan but you can see and attest to the location of where they exist.

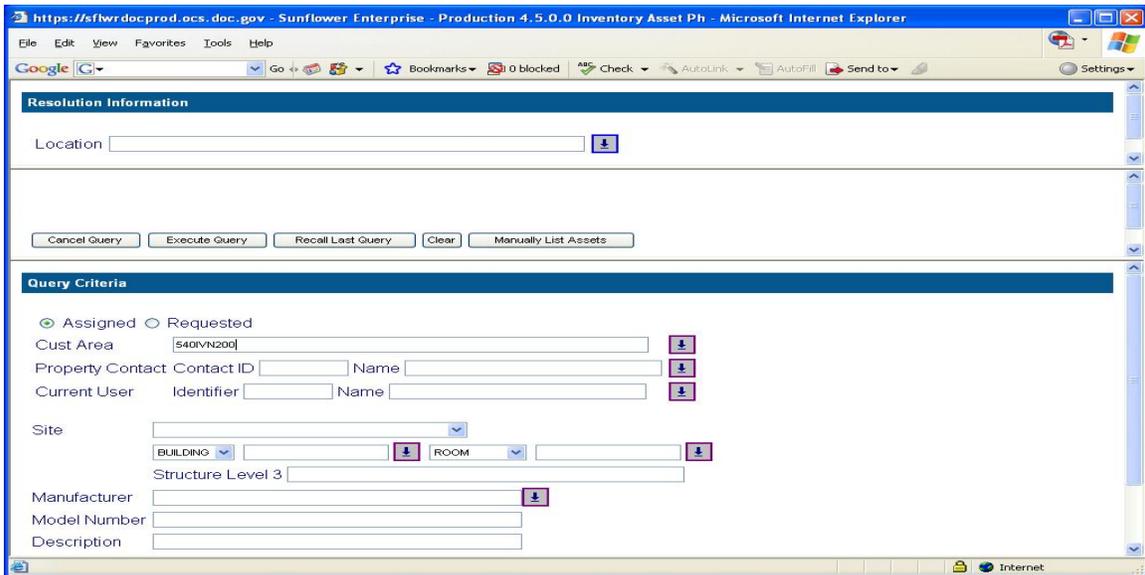
The following screen allows the PC to select a query of barcodes to be included in the resolution, or to enter the barcode manually.

# Property Custodian Online Resolution Inventory Procedures

## Click Enter Query



## Enter Custodial Area and click Execute Query



## Check property that was sighted.

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## Click Save to record your resolution



# Property Custodian Online Resolution Inventory Procedures

## Declared Unaccounted Resolutions

The PC should use Sunflower Enterprise Forms to record Declared Unaccounted Resolutions. **The Declared Unaccounted Resolutions are only used for assets with a CD-52 Final Event Reports for Lost or Stolen Assets.**

**Declared Unaccounted Resolutions** are used to remove an open item from the reporting cycle

- NOAA Property Custodians will use this resolution for unsighted property with a pending CD 52 Final Event Request for Lost or Stolen property.
- The Final Event Request Number must be annotated on the Annotated Inventory Listing.

## Create Declared Unaccounted Resolutions

Select: Sunflower Enterprise Forms



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Click Review

Click Create Resolutions

Click Create Inventory Asset

Type Declared Unaccounted

Justification: Lost/Stolen/Missing

Authorized By: Enter and select your name

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Resolutions

Type: DECLARE UNACCOUNTED  
Justification: LOST / STOLEN / MISSING  
Authorized By: Last Name\* First: Mid

Assets

Ck	Barcode #	Manufacturer / Model / Official Name*	Stock Number	Quantity	Unit of Measure
<input checked="" type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					
<input type="checkbox"/>					

Message

The justification level's long name, e.g. DEPARTMENT OF ENERGY  
Record: 1/1

Enter - The asset's barcode in the Barcode field of the Assets block.

Click - The Tab key and the asset information automatically populates.

Click - Save to create resolutions for the selected assets. Sunflower checks the Ok check box next to those assets for which a resolution was successfully created. If a resolution could not be successfully created, Sunflower indicates the reason in the Message field.

**The Property Custodian will initial bottom of each page of the Review Campaign Base Asset Report.**

### **Review Resolution Summary Report**

This report provides a summary of inventory resolutions. There should be no **“OPEN”** resolutions reflected on this report. This report should be printed and maintained in the Completed Inventory Folder.

Select – “Review Reports”

Select – “Review Resolution Summary”

Select – “The Review Campaign”

Select – “Interest Type (INVENTORY)”

Enter – “Custodial Area”

Click – “Submit”

Select – “Acrobat”

Print

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Sunflower Assets ASRV6030		Review Resolution Summary				Page 2 of 5 08/05/2005 15:04
<b>ONLINE PHYSICAL</b>						
<u>Flags</u>	<u>Count</u>	<u>% by Count</u>	<u>Value</u>	<u>% by Value</u>		
Sensitive	18	37.50	\$ 18,882.40	22.62		
Funded	0	.00	\$ 0.00	.00		
Bulk Purchase	0	.00	\$ 0.00	.00		
Estimate	0	.00	\$ 0.00	.00		
Workflow	0	.00	\$ 0.00	.00		
OTHER	9	47.92	\$ 99,329.21	99.17		
<b>Subtotal</b>	<b>27</b>	<b>0</b>	<b>\$ 129,211.61</b>	<b>97.41</b>		
<b>% of Totals</b>	<b>40.00</b>			<b>97.41</b>		
<b>ONLINE DECLARATIVE</b>						
<u>Flags</u>	<u>Count</u>	<u>% by Count</u>	<u>Value</u>	<u>% by Value</u>		
Sensitive	19	60.42	\$ 60,155.13	65.56		
Funded	0	.00	\$ 0.00	.00		
Bulk Purchase	0	.00	\$ 0.00	.00		
Estimate	0	.00	\$ 0.00	.00		
Workflow	0	.00	\$ 0.00	.00		
OTHER	10	52.63	\$ 154,138.44	60.83		
<b>Subtotal</b>	<b>19</b>	<b>0</b>	<b>\$ 214,293.57</b>	<b>62.01</b>		
<b>% of Totals</b>	<b>58.21</b>			<b>62.01</b>		
<b>CHANCE SHEWARD</b>						
<u>Flags</u>	<u>Count</u>	<u>% by Count</u>	<u>Value</u>	<u>% by Value</u>		
Sensitive	1	2.08	\$ 1,662.00	1.81		
Funded	0	.00	\$ 0.00	.00		
Bulk Purchase	0	.00	\$ 0.00	.00		
Estimate	0	.00	\$ 0.00	.00		
Workflow	0	.00	\$ 0.00	.00		
OTHER	0	.00	\$ 0.00	.00		
<b>Subtotal</b>	<b>1</b>	<b>0</b>	<b>\$ 1,662.00</b>	<b>.44</b>		
<b>% of Totals</b>	<b>1.49</b>			<b>.44</b>		

Sunflower Assets ASRV6030		Review Resolution Summary				Page 3 of 5 08/05/2005 15:04
<b>Totals</b>						
<u>Flags</u>	<u>Count</u>	<u>% by Count</u>	<u>Value</u>	<u>% by Value</u>		
Sensitive	48	100.00	\$ 91,599.33	100.00		
Funded	0	.00	\$ 0.00	.00		
Bulk Purchase	0	.00	\$ 0.00	.00		
Estimate	0	.00	\$ 0.00	.00		
Workflow	0	.00	\$ 0.00	.00		
OTHER	19	100.00	\$ 233,567.65	100.00		
<b>Subtotal</b>	<b>67</b>	<b>0</b>	<b>\$ 345,167.18</b>	<b>100.00</b>		
<b>% of Report Totals</b>	<b>100.00</b>			<b>100.00</b>		

## Submitting the Annual Inventory Package

At the completion of the Annual Inventory, PCs will certify and submit to their PAOs. The PAOs will certify and submit to their Staff/Line Office Property Manager (PM)

- Original copy of the Inventory Completion Certification signed and dated by the Property Accountability Office and Property Custodian.
- Copy of the initialed Review Campaign Base Assets report
- Copy of the Review Resolution Summary Report
- Copy of all support documentation, (i.e. Found Personal Property Certification, Online CD-50 Create in New Asset Request, Online CD-50 Excess Receive Request, and Online CD-52 Final Event Request.)

The Staff/Line Office PM will review inventory packages for completeness and submit the inventory packages to the Personal Property Management Branch.

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Property Accountability Officers and Property Custodians will retain a copy of the complete inventory package for future audits. (In compliance with DOC PPMM sec 4.805 (chain of custody) which states; Property Accountability Officer shall maintain, for each PC, signed listing of documents that evidence assumption of custodial responsibility by PCs.)

## Inventory Certification

NOAA Personal Property  
**Inventory Completion Certification Form**

I, \_\_\_\_\_, as Personal Property Custodian for  
*(Print name)*  
Custodial Area \_\_\_\_\_ certify that the Personal Property Listing as of  
date: \_\_\_/\_\_\_/\_\_\_ is completed.

Was this inventory conducted with a Barcode Scanner? Yes or No  
If yes, please provide the scanner barcode number: CD \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*(Please attached any additional comments if required)*

**Inventory Checklist:**  
 Inventory Certification has both PAO and PC signature  
 Submitted copy of initialed Review Campaign Base Assets  
 Inventory Resolutions has been recorded in Sunflower  
 Submitted copies of Online CD-5052 requests  
 Submitted copies of the Found Property Certifications

Property Custodian Signature: \_\_\_\_\_ Date: \_\_\_/\_\_\_/\_\_\_

Property Accountability Officer: \_\_\_\_\_  
*(Print name)*  
\_\_\_\_\_  
Date: \_\_\_/\_\_\_/\_\_\_  
*(Signature)*