Section 6
Creating Excess Request
To create an excess request, select the Excess pull-down menu. Place the cursor on “Request Excess Receipt” – the only selection that has a small arrow to the right, indicating that a sub-menu exists. The sub-menu will appear.

NOTE: You will need to retrieve text from another website during this process, which requires having a second internet browser window open – do not use one of the current three windows in use by Sunflower (2 ‘ofweb’ and one ‘java’) as this can cause an error that may result in the loss of your work.
From the choices in the sub-menu, select “Request Inventory Asset Excess Receival”.
A new window opens, into which you will enter the data about the item being exceeded.

Pick-up Location is first. Double-click on the field in order to enter the information about the location from which the item is to be picked up.

(If there is no pickup, such as an excess for a trade-up, or return to manufacturer, or another method that does not involve a physical action, this field can be left blank, and the current location in the property record will auto-populate here.)

**Note:** If a “No pickup” request is needed using the EXCESS disposal method a PSR-PMO approval is need before submitting the request. Place “NO PICKUP and Approved by (the approver)” in the comments below the EXCESS template.

See next page for location entry details.
Fill in the location field the same way any location is entered:

Enter (or double click and select from the choices) the Quad.

Next, in the blank field to the right of the “BLDG-FLOOR” field, enter the building and floor combination (or double-click and select from the list of choices). The list of choices for this field include building names, so if uncertain, scrolling through the list may assist you in finding the building you want.

After the building is selected, enter (or again, double-click for the selection) the room number, in the field to the right of the “ROOM” field. Please do not enter notes in the room field. Place notes under the template.

Note: Once a Quad is selected, the list of possible buildings is limited to those in that Quad. Likewise, once a building-floor combination is selected, the list of rooms will be limited to rooms on that floor. (this does not work in reverse – you must start with the quad)
Deliver-to Location for Excess (09-STADIUM_110-01_101) which also includes SCRAP, SALE and VEHICLE disposals. You must enter the deliver to location. Do not leave blank.

If this excess request is for any of the financial disposal methods (ALL OTHERS), it is very important that the deliver-to location be changed to the correct location for the method of excess:

ALL OTHERS – STERN_040-01_122

**CAUTION:** If the deliver-to location is left as EXCESS, the item may be picked up and recycled, which cannot be reversed. You cannot retrieve the asset after it has been scrapped, and your department will not be reimbursed for any losses sustained.
The next piece of information to enter is the barcode tag number of the item. When you enter the tag number (the last seven digits) and click tab, the Manufacturer, Model and Official Name of the asset will automatically populate in their respective fields.

*(for items to dispose without barcodes, use the SPARC portal’s excess application)*


Also enter the condition of the item. You can either double-click and select from the choices in the list, or simply enter the number that corresponds to the correct condition of the item, as follows:

1 - Good Condition  (NEVER used for items being scrapped! We don’t scrap good stuff!)
2 – Poor Condition
3 – Minor Repair
4 – Major Repair
5 – Beyond Repair

Next, you need to enter some information specific to the method of disposal you are using – see next page. Do Not Save until you are completely done – once saved, an excess request cannot be edited or modified, only cancelled (withdrawn).
To enter the information about the specific excess method, you will need to retrieve and paste an “excess template” into the comment field of the request. Please select the template from the official PMO web site’s excess page. You will need to open an additional browser session to do this. From any computer on the Stanford network, you can access this page simply by entering the word “excess” (no quotes) in the address bar.

The page address is http://ora.stanford.edu/ora/pmo/disposal/DPA_excess_text.asp

Note: as mentioned earlier – do not use one of the three windows in use by Sunflower, as this may result in the loss of your current work. Open this page in a new browser window.
To select the template text for your request, you can either click on the excess method (see the list indicated by the arrow in the above screenshot) or you can click in the text box itself (the one for EXCESS is shown here – other choices can be found by scrolling down on the same web page)

By clicking on the method name or within the text box will perform both the select and copy functions for the entire text – you do not need to highlight or right-click or hit control-c – the system will automatically perform the copy function for you.
In this example, we have selected the text box for EXCESS, and the text has been automatically highlighted and copied by simply clicking once within the box.

Go back to your active Sunflower session.
By placing your cursor in the Comment field, and using Control-V (hold down the key on your keyboard marked “Ctrl” and simultaneously press the letter “V”) you will paste the text from the excess template selected.

Note: Sunflower does not recognize ‘right-click’ actions on the mouse. You must use the control key function for copying, pasting, and other actions.
Next, please fill in the pertinent information for the template.

You do not need to add any manufacturer or description, as this has already populated from the property record.

Always include the contact name and number of the person who would be appropriate to contact for assistance with picking up the item (for example, gaining entry to a locked room).

If the item requires Labor assistance (i.e. is large or heavy, requiring more than one person to move) you must create the labor “customer-funded work request” BEFORE completing the excess request. The SR number is required under Labor Work Order.

Refrigerators, Freezers or any equipment using Freon/other coolants that are environmental hazard must include a PSSI “customer-funded work request”. PSSI is the only entity authorized to collect these items.

**Note:** Incubators are also included for PSSI disposal because some have cooling mechanisms that require special removal.

If the asset required Environmental Health & Safety cleaning due to potential radioactivity or hazardous biological residue, that must be completed prior to creating the request, and a “Y” entered here, indicating that has been completed.
ALERT! If you need to add notes to the request please do so at the bottom of the template.
Do not use the room or mailstop fields for notes.

Once the template info is complete, click on the SAVE icon in the upper left corner.

When your request successfully saves, it will indicate so by generating a Request Number, and stating “Complete” in the Message box at the bottom of the screen.

You might want to write down the request number for printing the pickup form later. This is not required, as you will still be able to find the request under your name or department – which is actually easier if you have several requests at one time.
If you have additional requests to generate, and they have the same pick-up and deliver-to locations, you can skip re-entering the location data and generate more requests by placing the cursor in the SU Barcode # (tag) field and pressing the “down arrow” key on your keyboard (the arrow keys are usually located toward the lower right corner of the keyboard). This will keep the locations intact, and blank out the lower part of the form for the next asset’s data entry.
WITHDRAWING AN EXCESS REQUEST

From the Excess pull-down menu, select the choice “Withdraw Excess Receival Request”
Enter the number of the request you want to withdraw in the “Request No” box, and click TAB.
The data from the request will populate all fields. Double-check to ensure this is the request you mean to withdraw. Once you are certain, click the SAVE icon. That’s all there is to it, the request is withdrawn.
This is what the screen should look like when a withdrawn request is completed successfully.
PREVIOUSLY DISPOSED ASSETS

When an asset has already been disposed of you will encounter the message seen on the screenshot above (AS-01035: xxxxxxx (SU ID) is no longer active). Do not click OK. Click on the X on top of the dialog box and also click on the X at the top of the window.
When the box appears with options to save changes click NO and the box will disappear. Please check the summary and history of the record. If there are any discrepancies please contact your PSR. To dispose of the item please use the non bar-coded disposal application in the SPARC Portal https://sparc.stanford.edu/ and reference that item has previously been disposed of in Sunflower.