Section 6
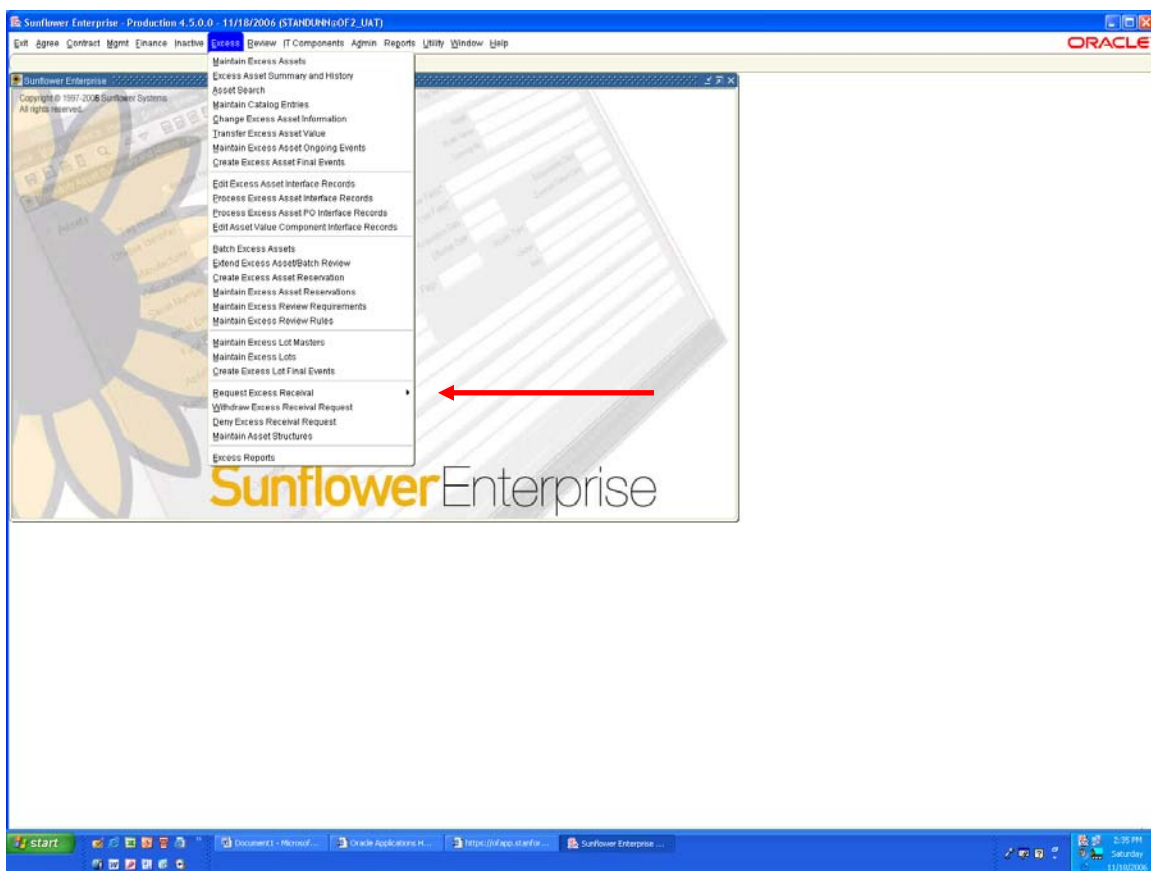
Creating Excess Requests

Sunflower User's Guide

Revised August 2013

Sunflower is used solely for administrative record dispositions, not to generate a pickup request for physical equipment disposal. Excess methods that may fall under the administrative category include, but are not limited to, Return to Manufacture, Transfer to Outside Institution, Return to Sponsor, Trade-Up, Stolen. Any excess requests that do not require physical pickup due to extenuating circumstances, e.g. offsite disposal, scrap requests that do not require pickup, cannibalization, require specific approval by a PSR.

If you have a request that requires physical pickup, stop here. Instead, please use the SPARC Excess Request application for all disposals requiring physical pickup by Surplus Sales, PSSI, or the Labor Shop.


To create an excess request, select the Excess pull-down menu. Place the cursor on "Request Excess Receival" – 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 web site 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.
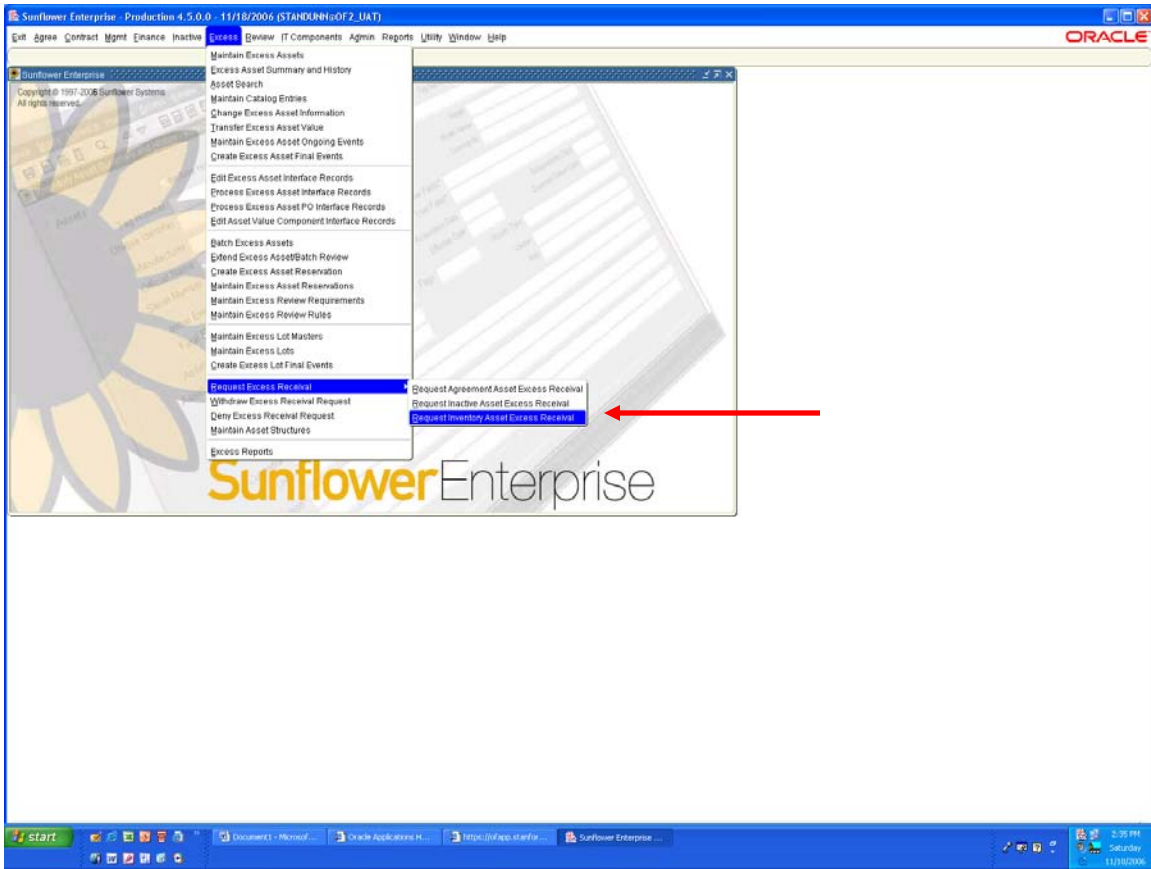
From the choices in the sub-menu, select "Request Inventory Asset Excess Receival".
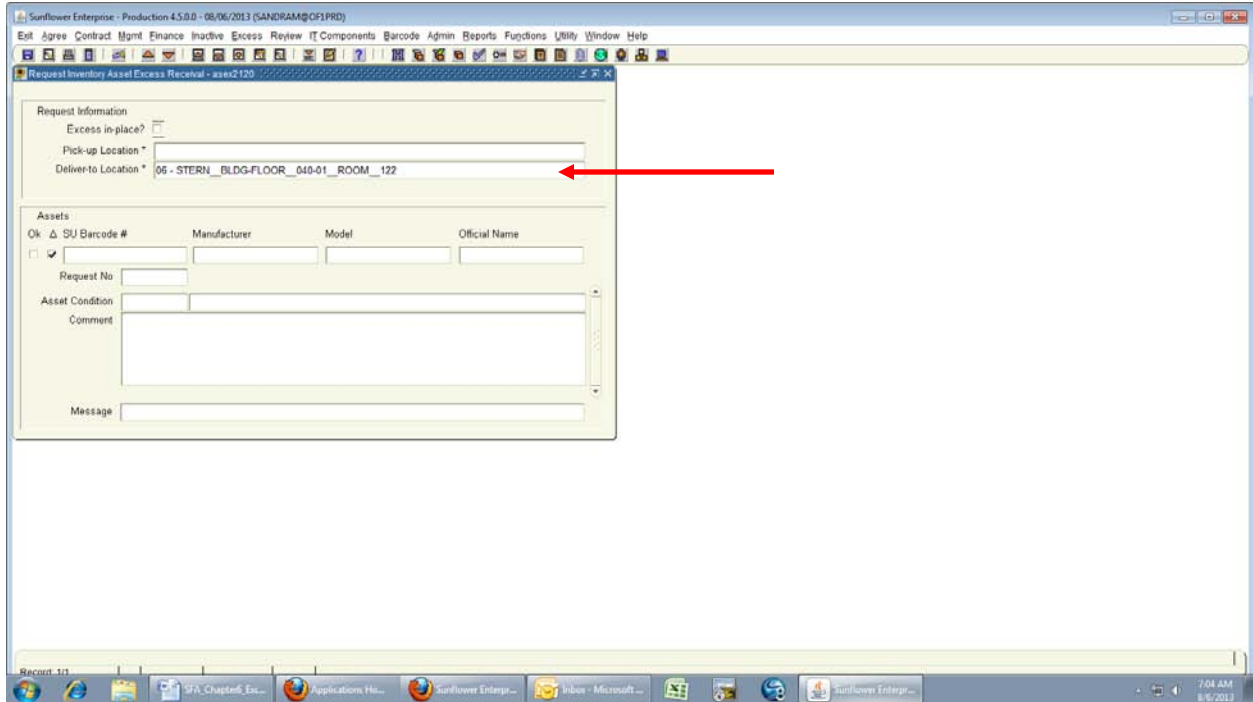
A new window opens, into which you will enter the data about the item being excessed. <u>Do Not Save</u> until you are completely done – once saved, an excess request cannot be edited or modified, only cancelled (withdrawn).

The Deliver-to field will auto-populate with a location. DO NOT CHANGE THIS INFO. The report PMO runs to monitor and process record retirements is dependent on this location data.

You do not need to include any information regarding pickup location, since there is no physical collection required.

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.

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
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.

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. You will need to open an additional browser session to do this.

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.
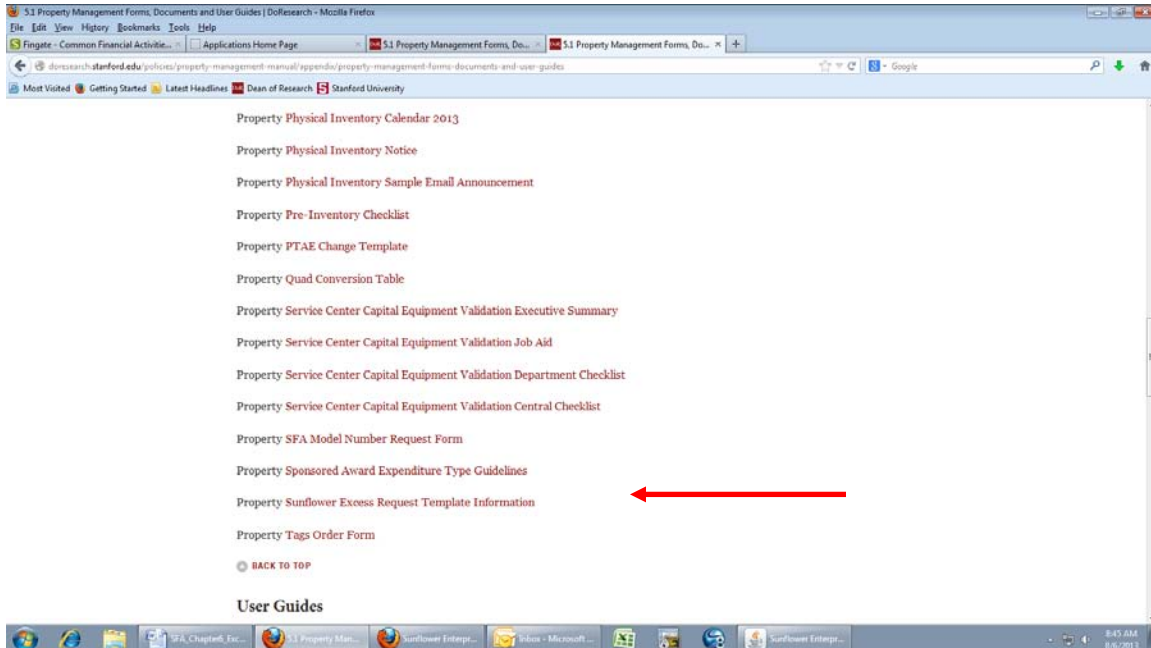
To access the Excess templates, go to the Property Management (PMO) page of the Dean of Research (DoR) website.
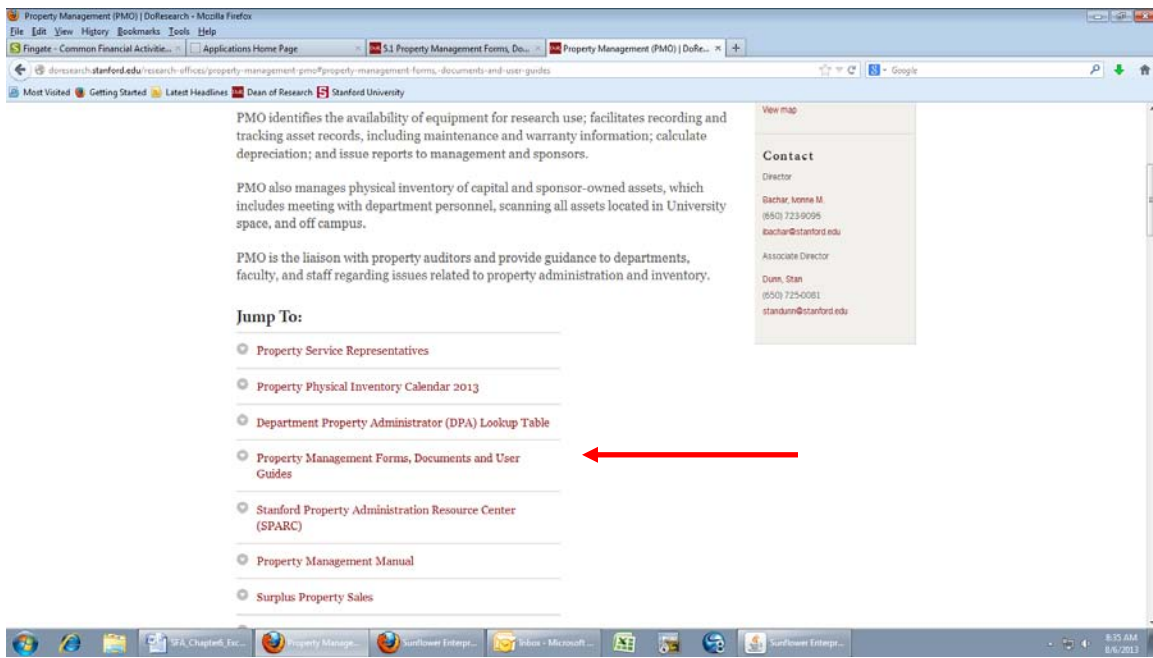
In the "Jump To" menu, select "Property Management Forms, Documents and User Guides".
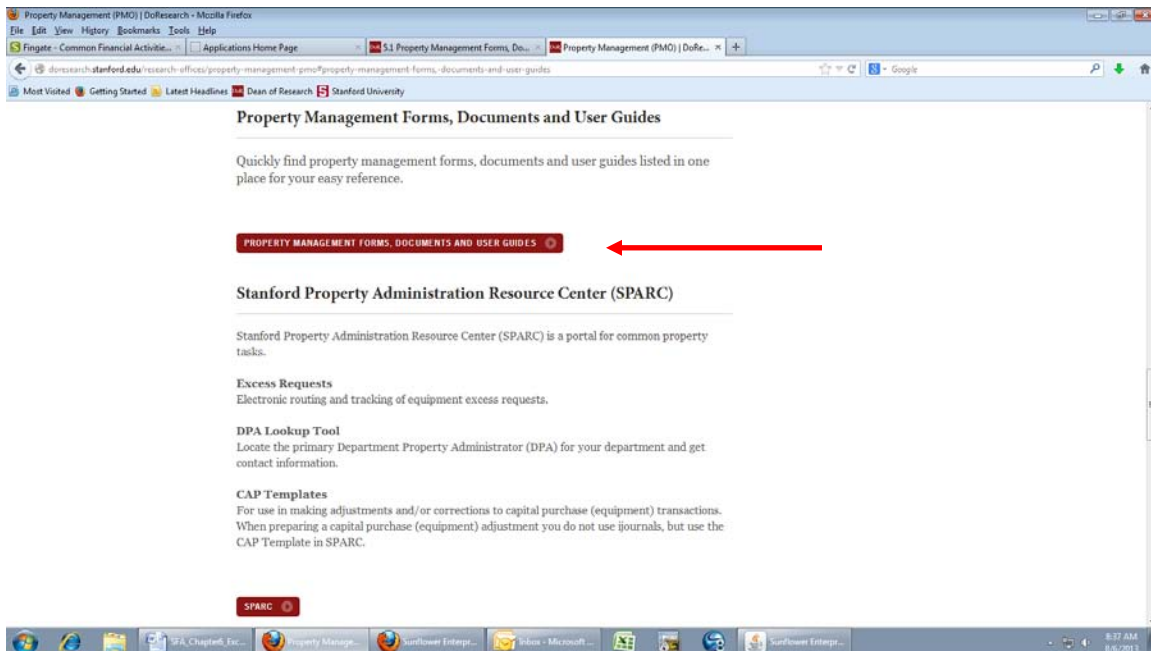
Then click on the red "Property Management Forms, Documents and User Guides" link.

Scroll down to the Forms and Documents section and click on "*Sunflower Excess Request Template Information*".
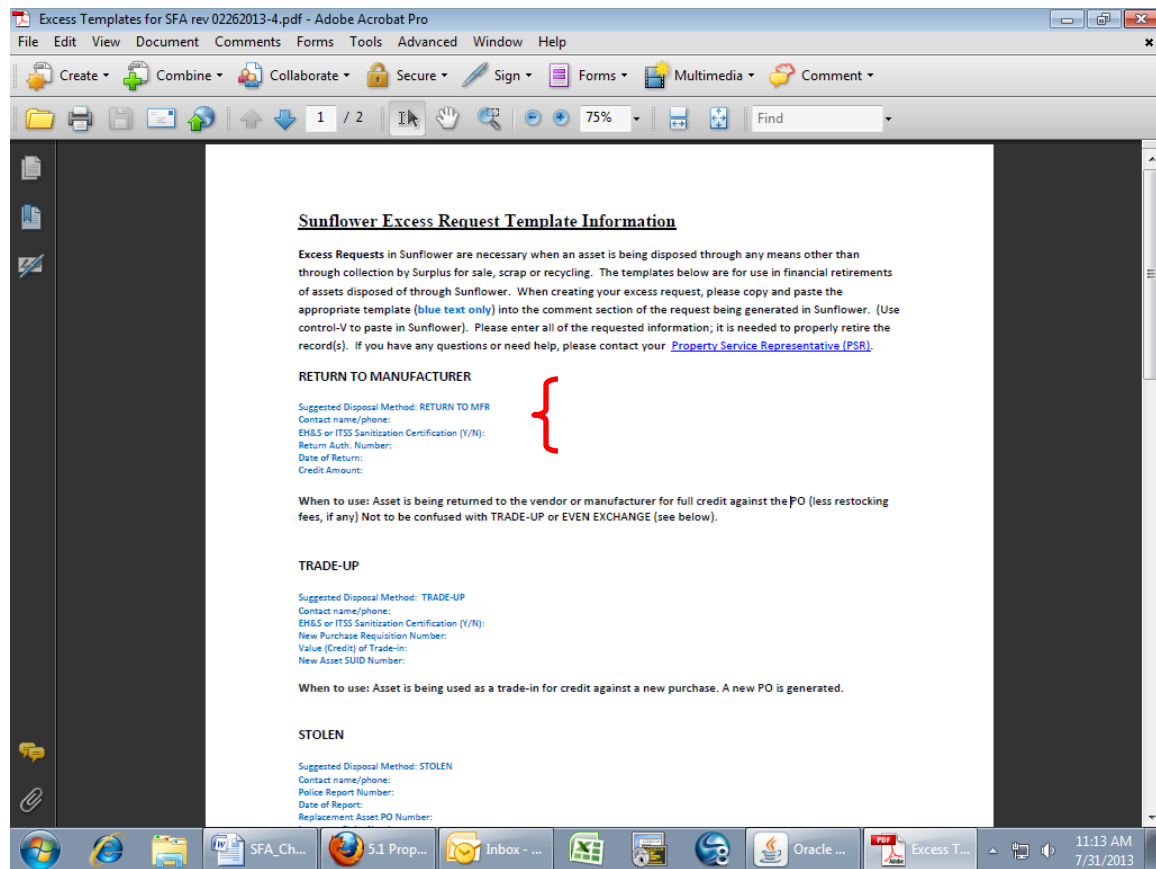
To select the template text for your excess request, highlight the blue text for the method you need, and copy the text by simultaneously pressing the Ctrl key and the C key (Ctrl-C) . Go back to your active Sunflower session. (Click the Java icon at the bottom of the screen – it looks like a steaming coffee cup).

Place your cursor in the Comment fields, 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.

In this example, we have cut and pasted the template information for "Return to Mfr".

NOTE: You may need to use your up and down arrow keys to access all lines of the template information after you paste it into the comments section.

Use Control-V to Paste!
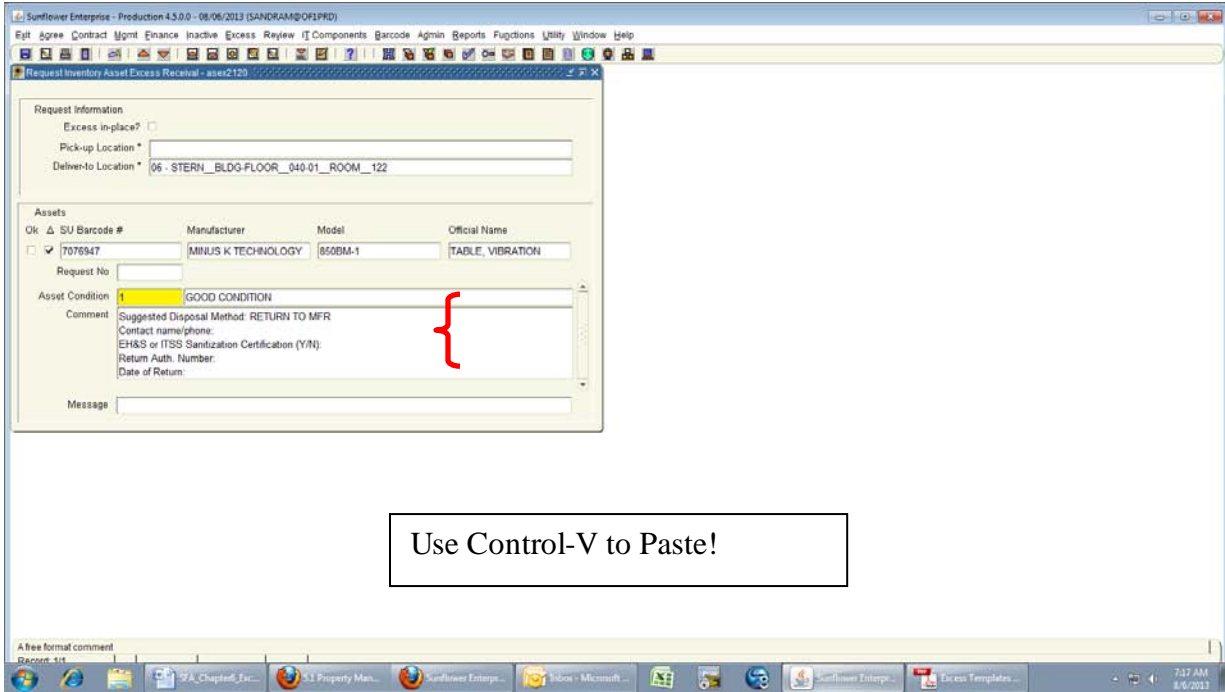
Note: Sunflower does not recognize 'right-click' actions on the mouse. You must use the control key function for copying, pasting, and other actions.

Next, please fill in the pertinent information for the template.

Always include the contact name and number of the person who would be appropriate to contact should any questions arise about the transaction – in most cases this is you, the DPA.

Other information is specific to the type of disposal being requested. Enter as appropriate, but please answer all questions. Contact your PSR if you need some guidance on any of these.

Be sure you complete all lines of requested information. Use the up and down arrow keys as needed to scroll through the template lines.
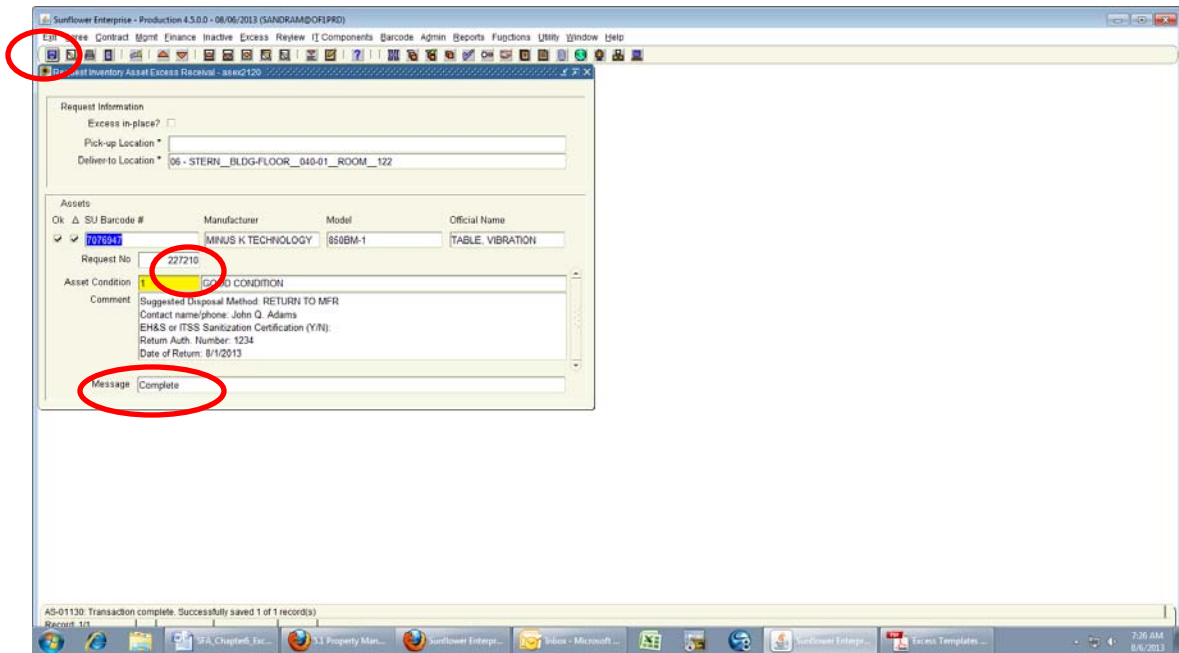
Once the template info is complete, click on the SAVE icon in the upper left corner.

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.
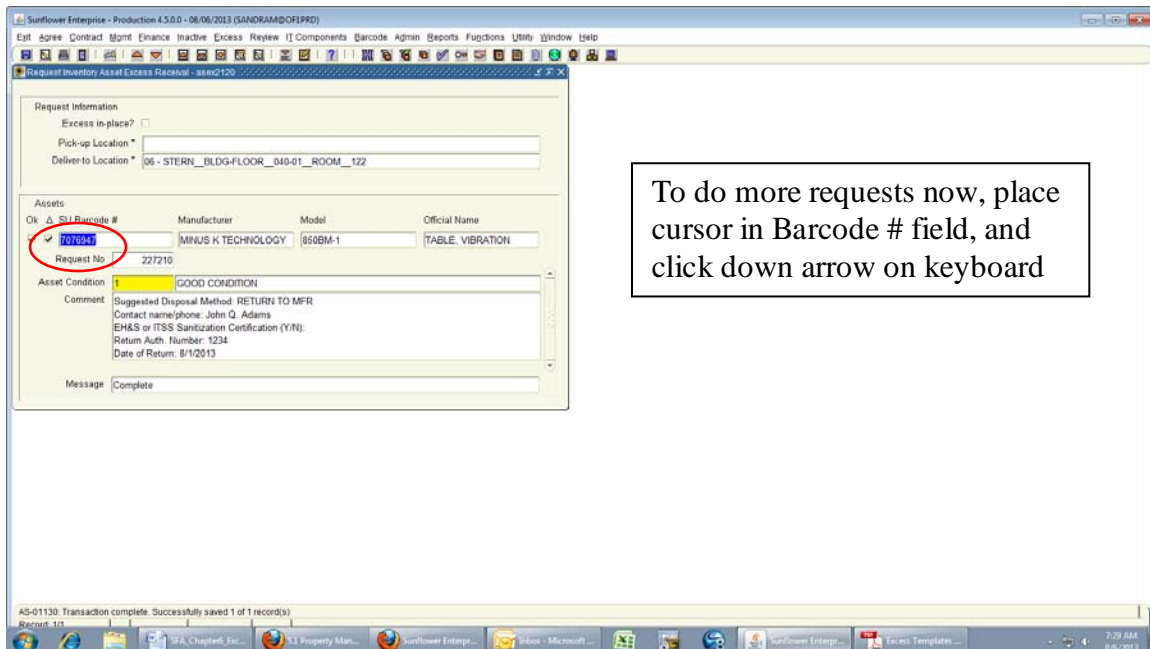
If you have additional requests to generate, you can generate more requests by placing the cursor in the SU Barcode # (tag) field and pressing the "down arrow" key on your keyboard (the arrow keys are usually located toward the lower right corner of the keyboard). This will blank out the lower part of the form for the next asset's data entry.

Tip: If doing multiple requests that all have the same template information, copy the template again (use control-C to copy) here in Sunflower, with all of the information filled out, so you just need to paste it in the subsequent comment fields for the other requests.
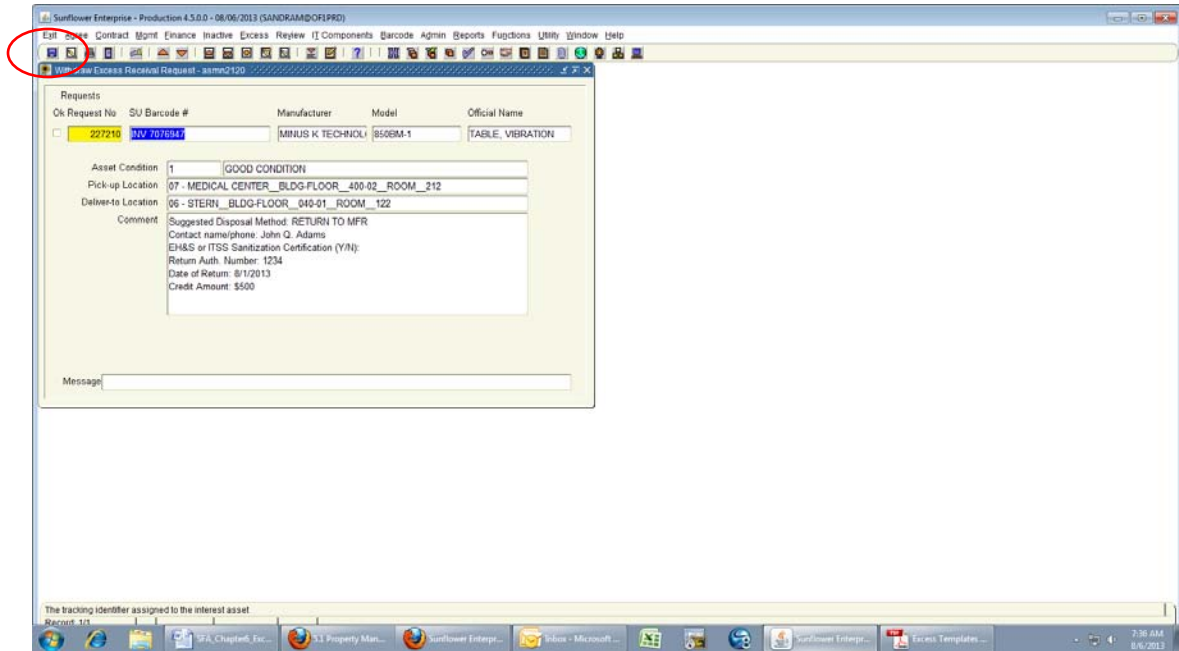
WITHDRAWING AN EXCESS REQUEST
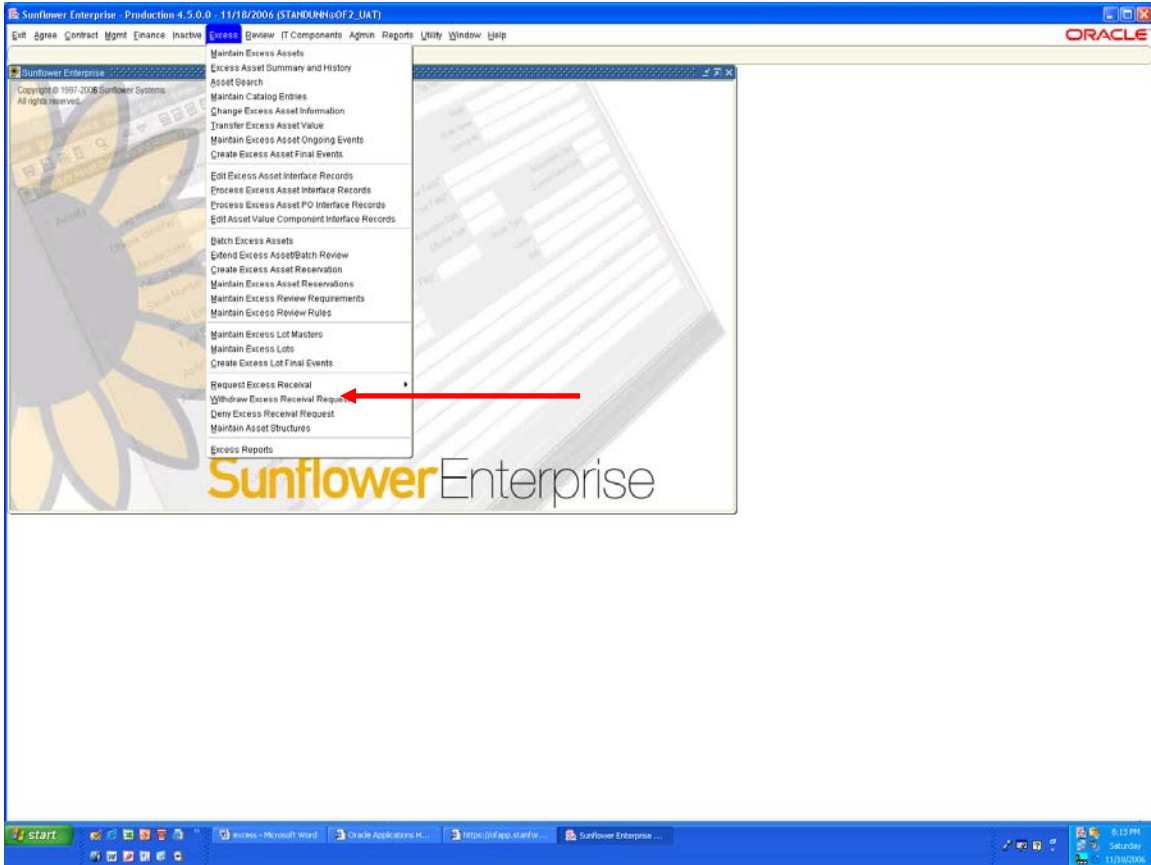
From the Excess pull-down menu, select the choice "Withdraw Excess Receival Request"
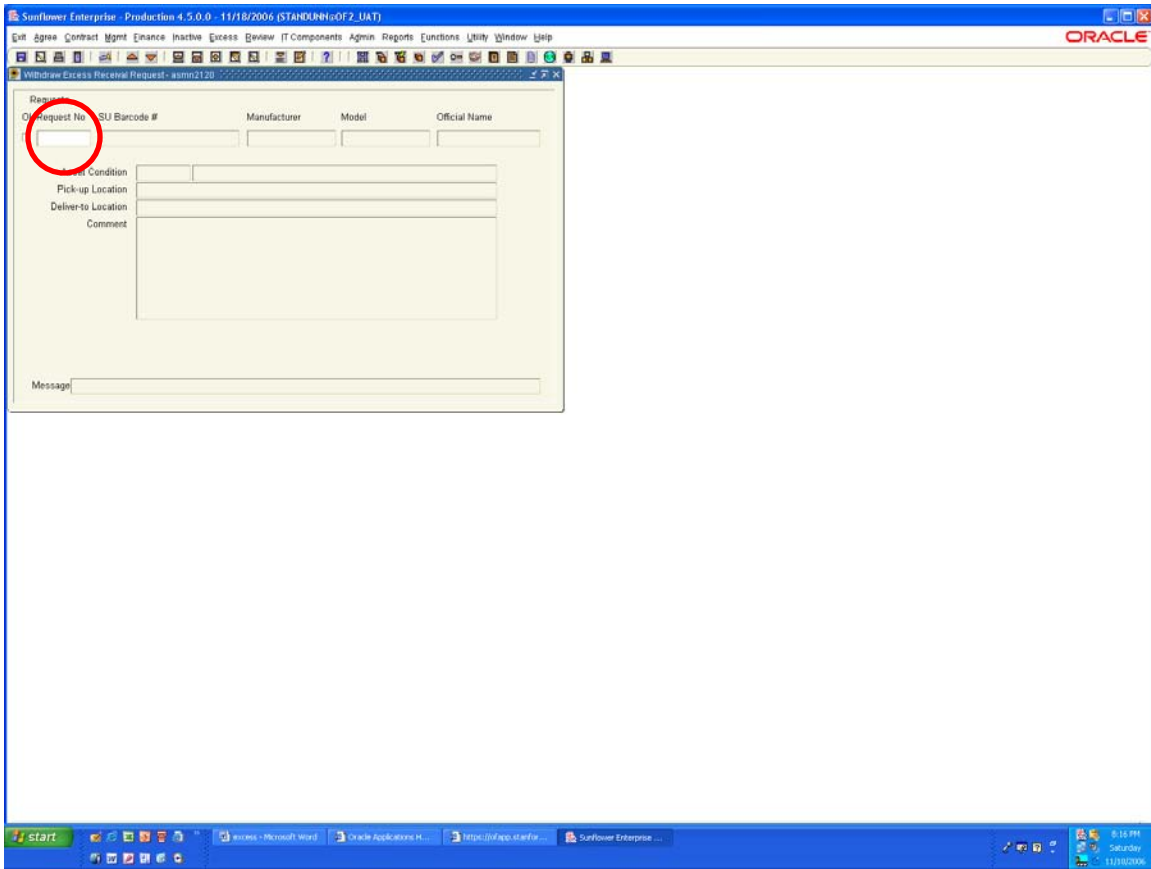
Enter the number of the request you want to withdraw in the "Request No" box, and click TAB.

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.