SUNFLOWER USER GUIDE

Accessing Sunflower Enterprise Assets
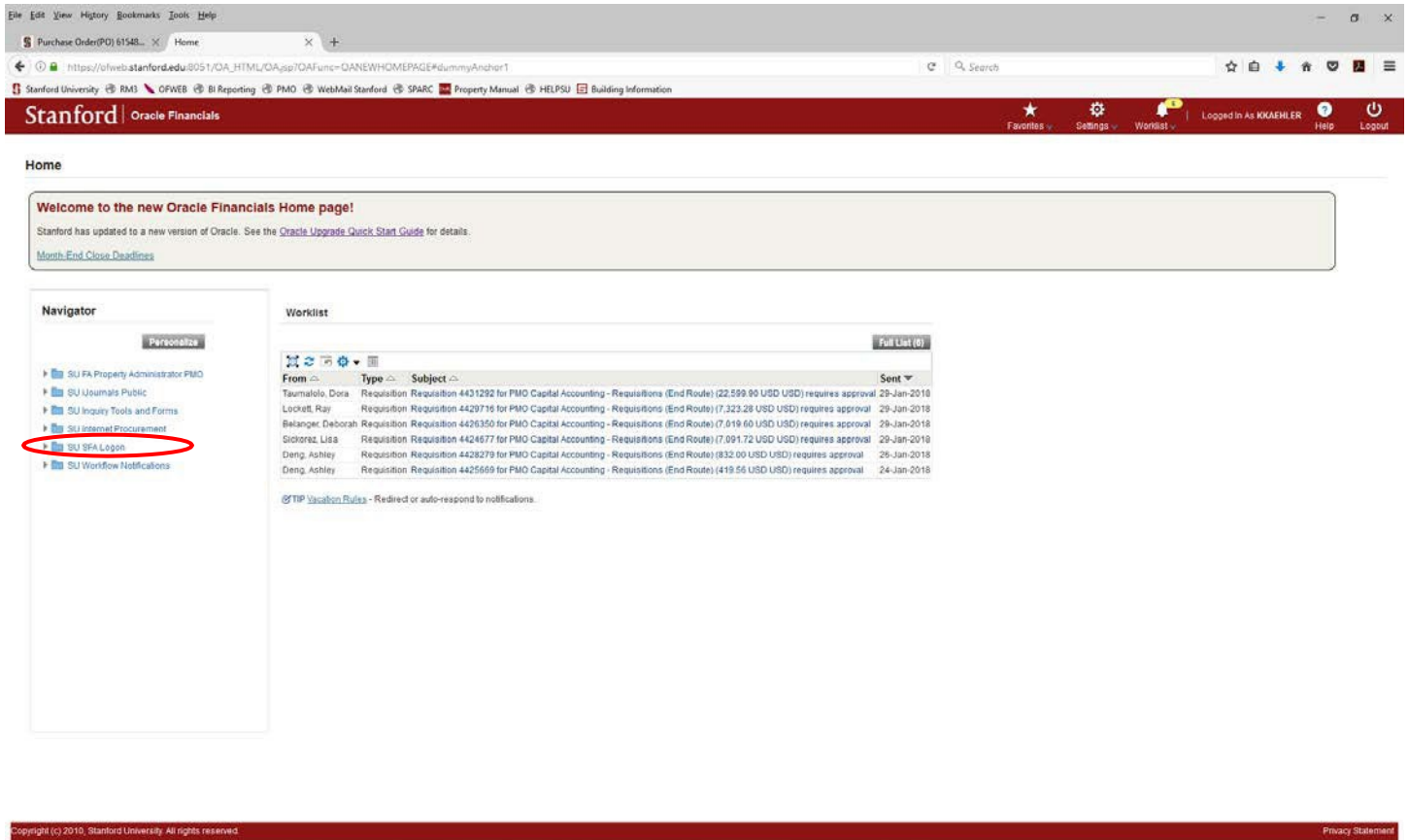
Access to Sunflower is through the Oracle Financials portal, which can be found by typing in 'ofweb' into your browser or by typing ofweb.stanford.edu in the address bar of your internet browser (when in the campus network).

Click on the SU SFA Logon link.

Note: Sunflower, as with all other Oracle applications, works best in Mozilla Firefox.
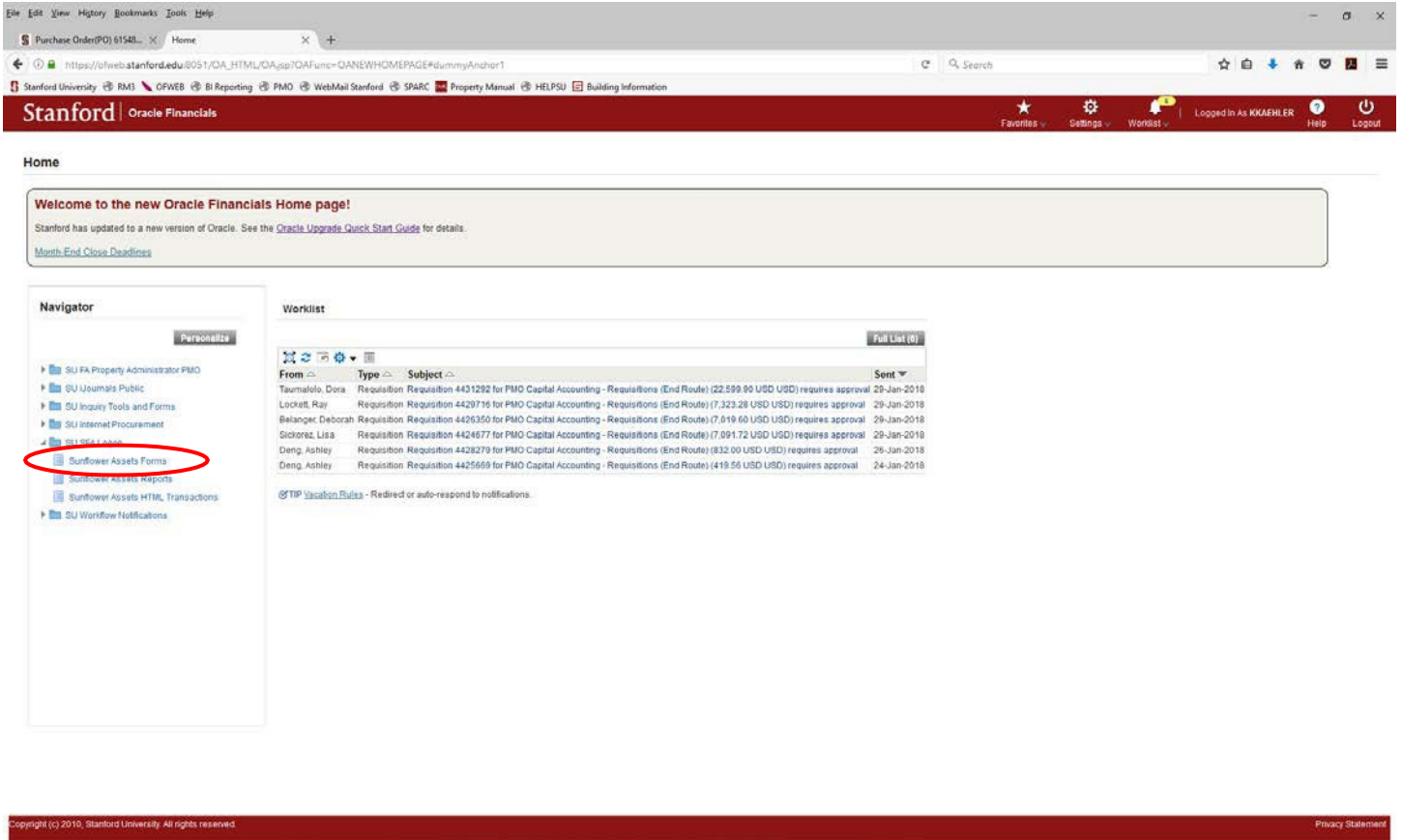
The above screen will appear. There are three choices for Sunflower entry. Forms, Reports, and HTML Transactions. Unless you only wish to run a report, the best choice is to access via Forms – reports can be accessed from there as well.

This action will open one internet browser window and will launch a java application. It is important that the windows remain open for the system to work. They may be minimized but should not be closed.

Note: HTML Transactions is currently not in use, so this link is inactive. Also, some people who have been granted reporting access only will see only the Reports link.
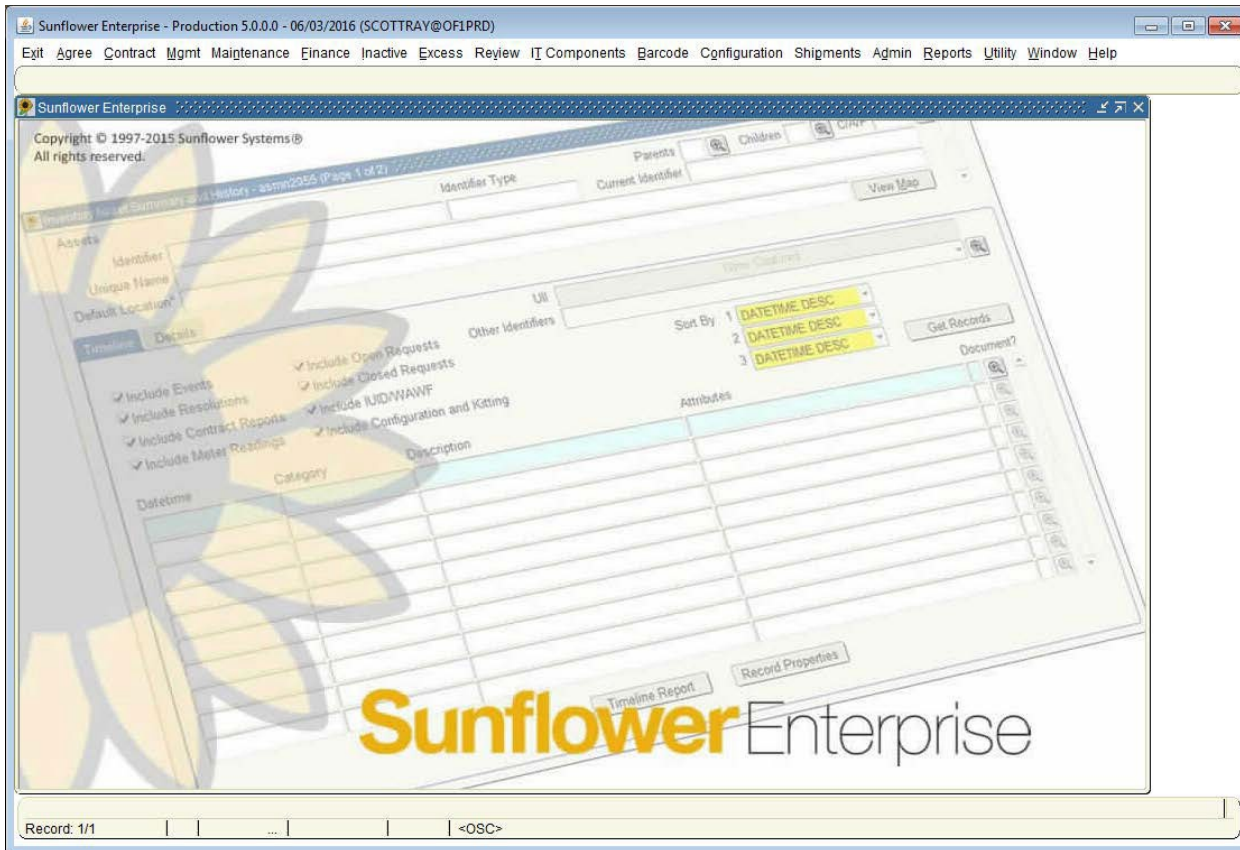
If you encounter an error message, please contact your PPM.
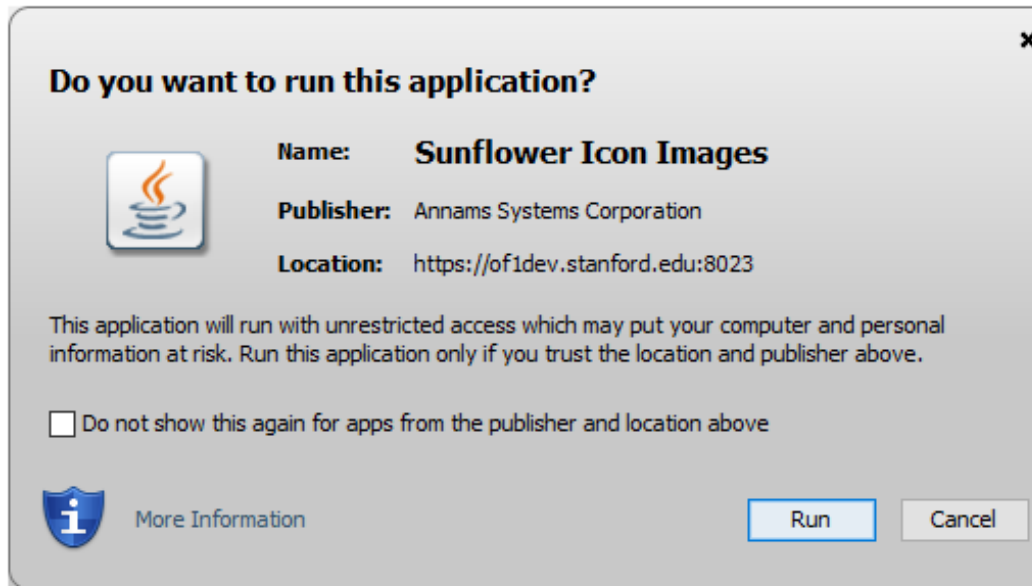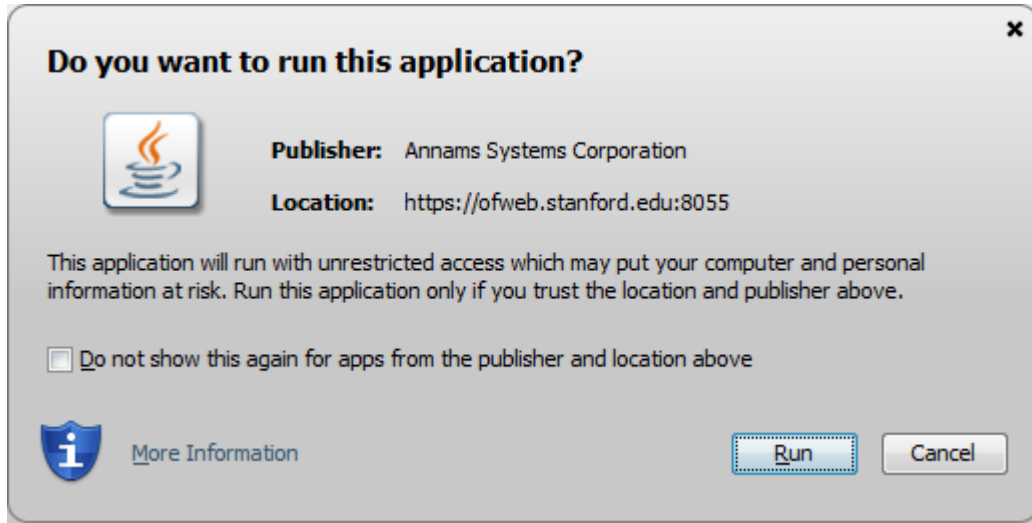
This is an example of the two prompts you will see after you click on the Sunflower Assets Forms link.
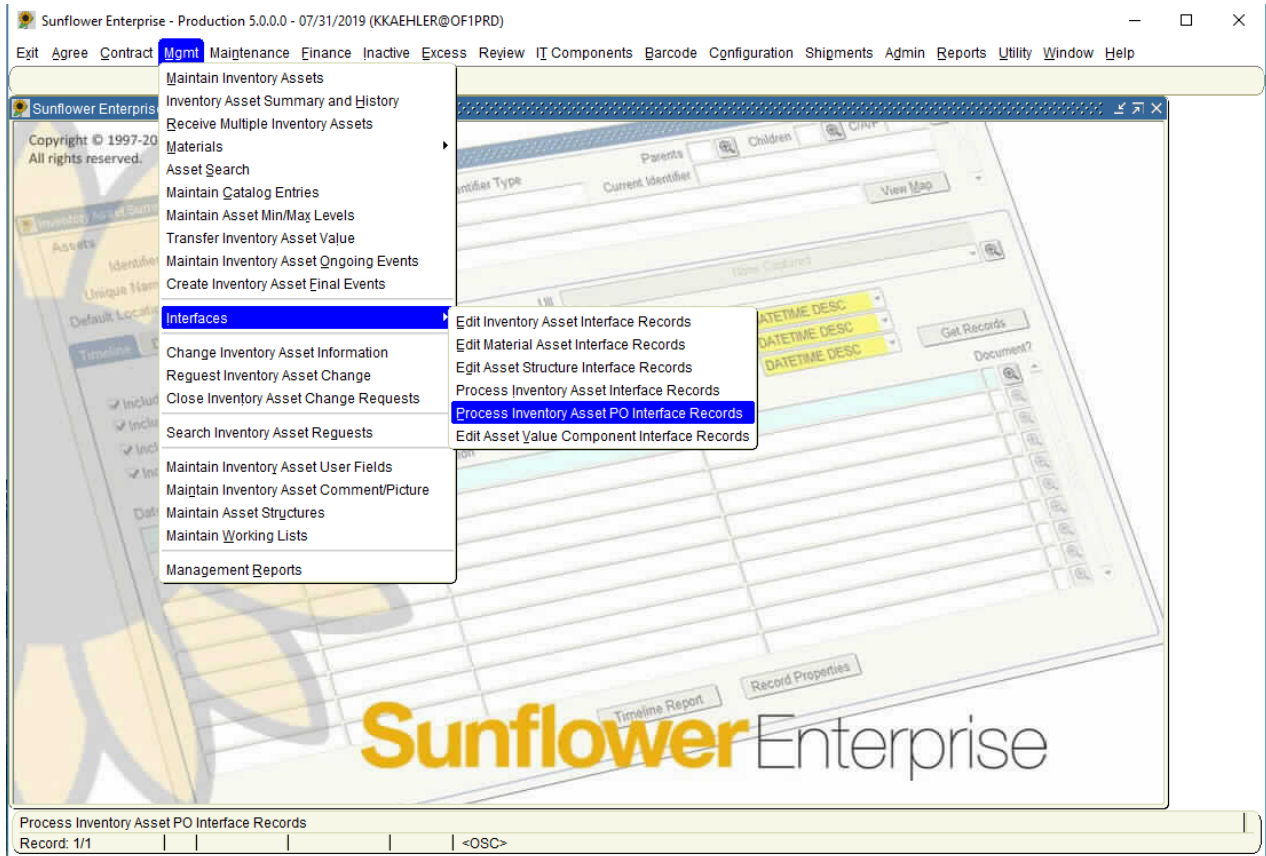
Be sure to select 'run' on each.

This is the screen you will see once you have successfully logged into Sunflower.

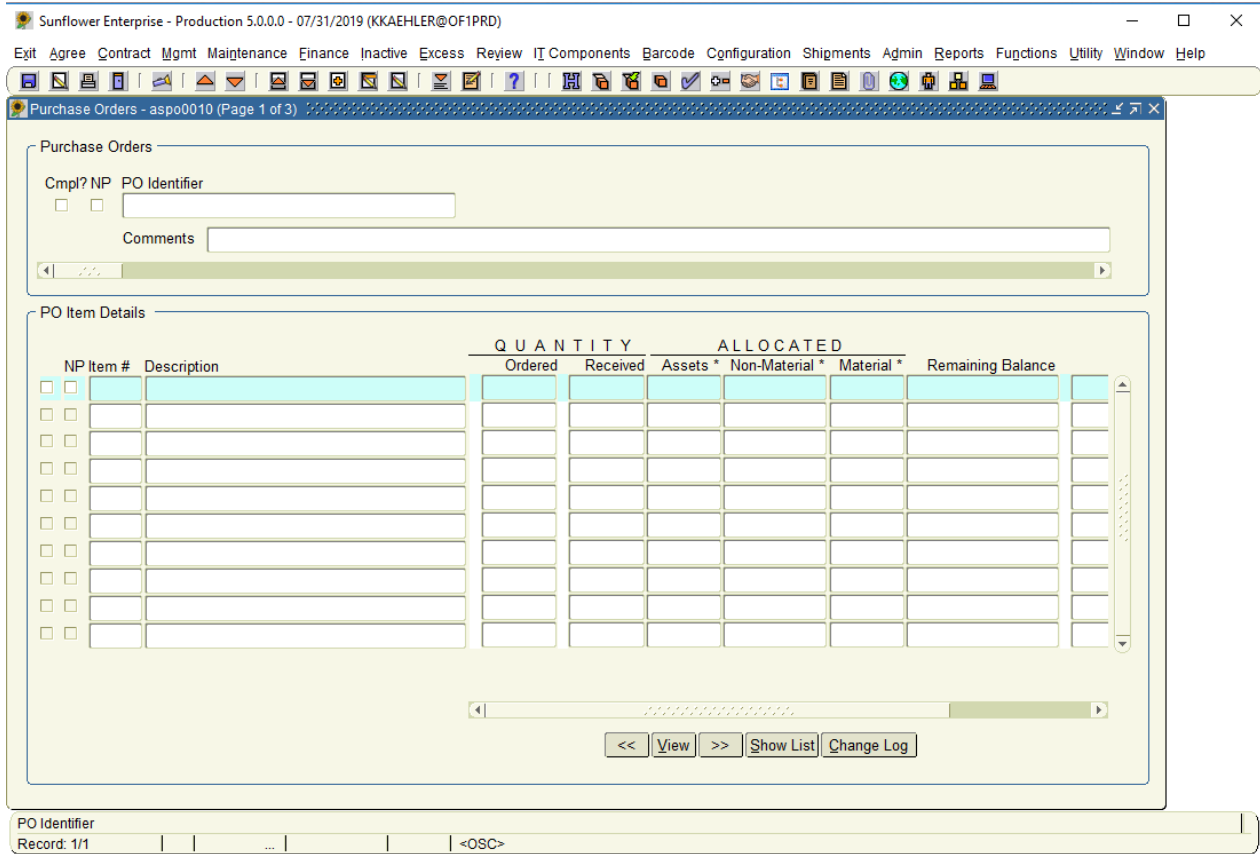# SUNFLOWER USER GUIDE

Creating Records through the PO Interface

For use with Stanford property only

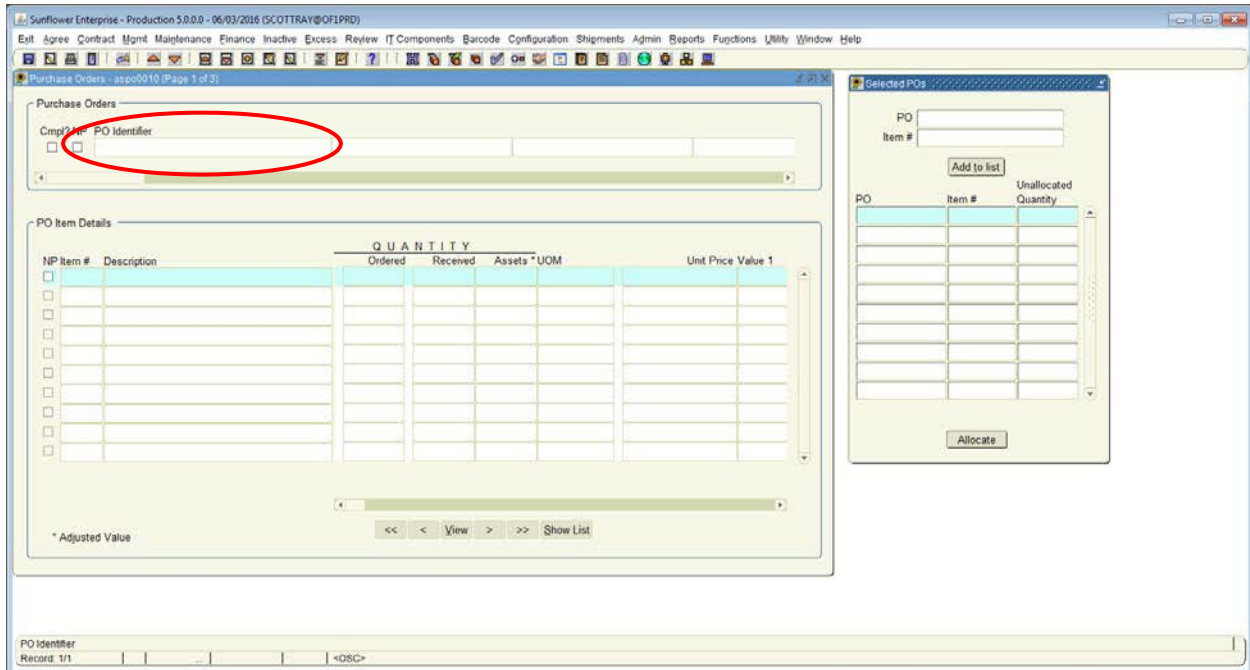From the Mgmt pull-down menu, select the choice "Interfaces" then "Process Inventory Asset PO Interface Records".

To make the screens more user-friendly, it is recommended that you maximize the size of the active window. To do this, click on the box shape in the upper right corner of the active screen.

There are three symbols here, a "minus sign", a "box", and an "X". Click on the one that looks like a box.

Now, use your mouse to place the cursor on the dark "title bar" of the Allocation screen. Holding the mouse button you can drag the screen to the right, into the blank area, so both screens are fully visible.

These last few steps have been optional, but most people find it much easier to work with the data when all of the information is fully visible.

Click the Show List button on the bottom bar and the Allocation box opens. Holding the mouse button in the blue title bar, you can also drag the box to an open screen area, making all of the information visible.

The next step is to enter the PO number in the PO field. Then hit the 'enter' or 'tab' key on your keyboard.

If the PO is available in the interface, the information will populate in the data fields (see next page)

If the PO is not in the interface, you will receive an error message stating "no identifier found"

Note: It takes an overnight process in Oracle Financials for a PO to migrate into Sunflower after it has been received in the iProcurement system.
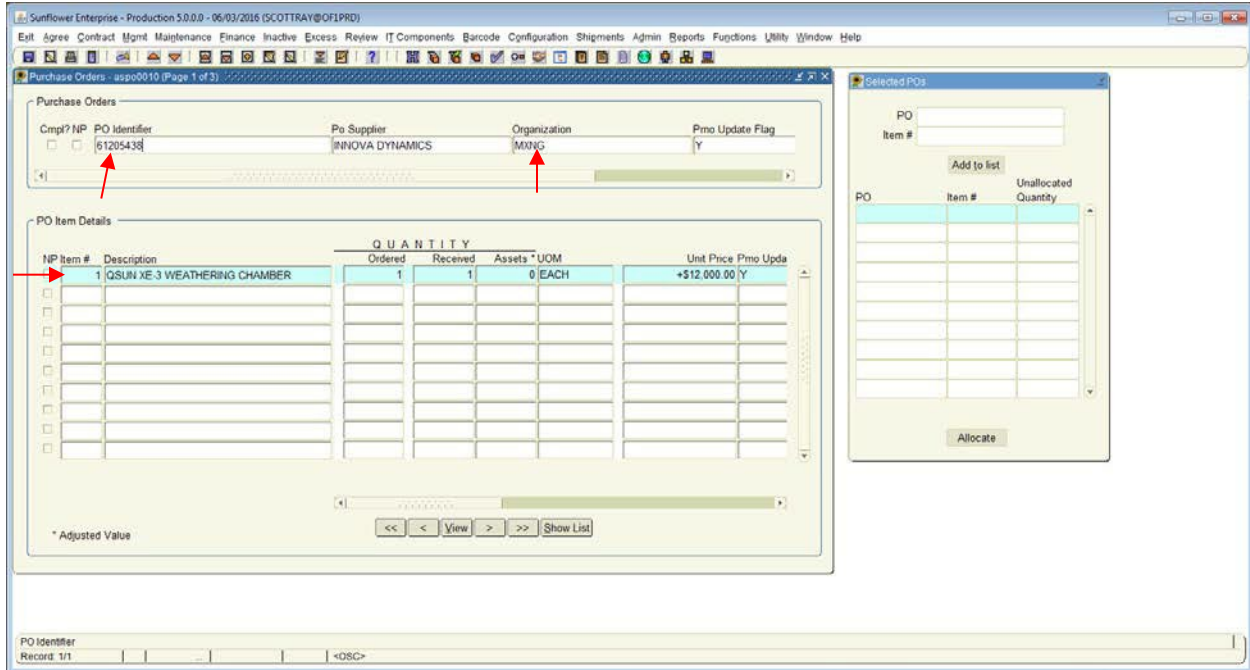
Here is an example of a PO in the interface. Notice that in the header box the PO number, the Supplier, and the four-alpha org code appear. The PO lines appear below, in the PO Item Details screen.

Note: You can search for POs using the 4-alph org code as well. To do this, click on the flashlight icon, hit the tab key twice to position the cursor in the correct field, enter the org code with a % sign on both sides of it (for example %WZAU%), and click the flashlight icon again. All POs that involve that org will be available to view and process. Place the cursor in the PO number field, and use the up and down arrow keys on your keyboard to scroll through the POs.

Hint: When you first click the flashlight icon, the titles of the fields may disappear. This is OK, just hit tab twice to place the cursor in the correct field.
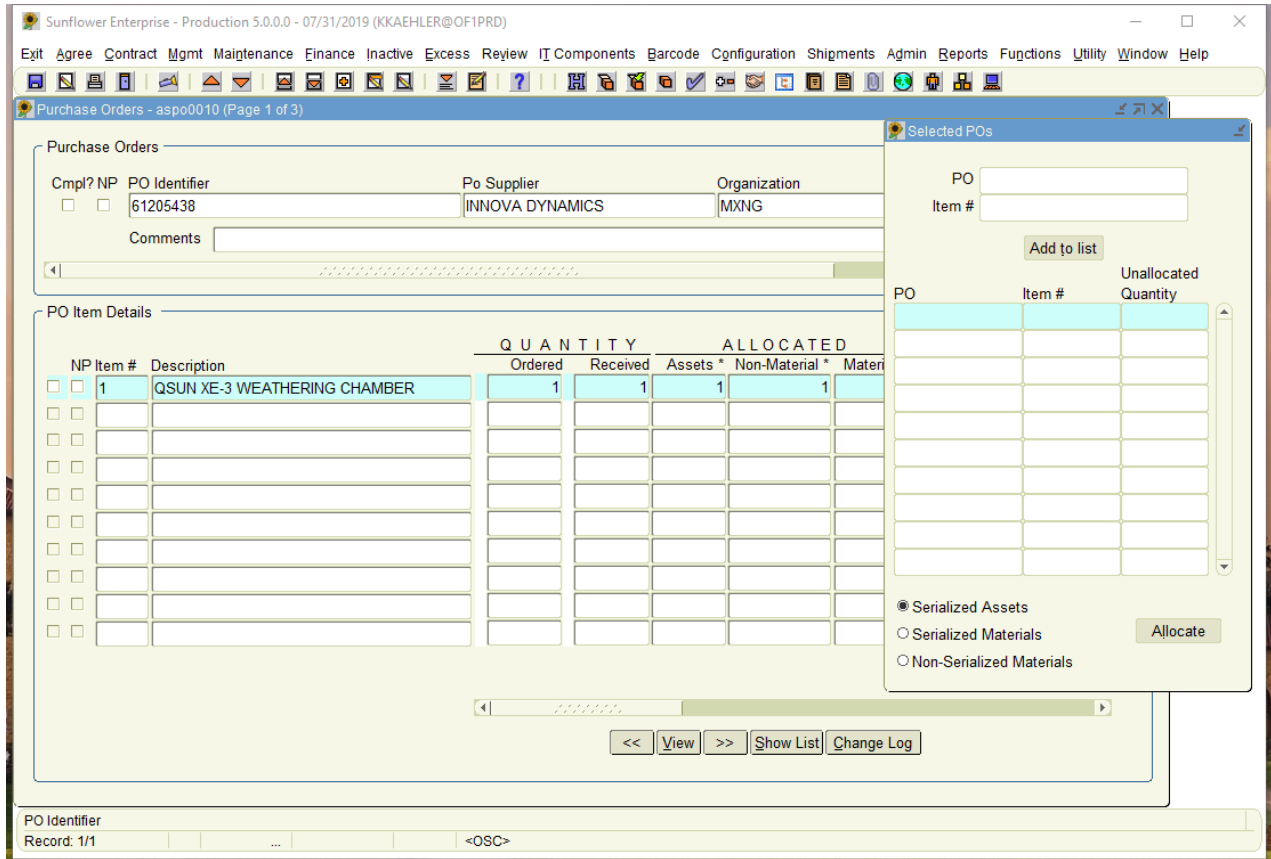
Click the small box to the far left of the line you wish to include on your record. Repeat this action for each line you wish to include in the asset record.

Note: If *ALL* of the lines in the PO should be included, you can move them all at once by using the " >> " button. If you move a line into the Allocation screen in error, you can remove it by highlighting it in the Allocation screen, and clicking on the " << " button.
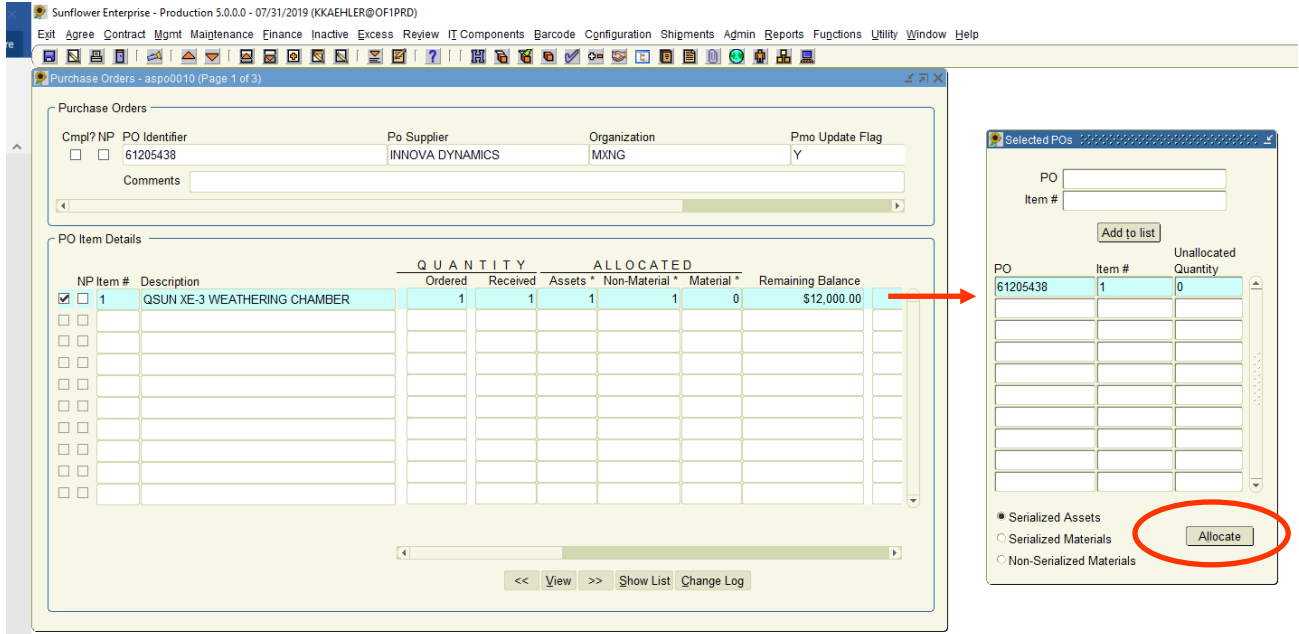
Notice that the line(s) selected have entered the Allocation screen. Once you have all of the lines you want in the Allocation screen, click the "Allocate" button.

Note: If more than one PO is involved in the asset being recorded, before hitting the "Allocate" button, you may search for and process additional POs, again selecting the lines to move into the Allocation screen. The Allocation screen can hold as many lines from as many POs as necessary.

Hint: If your asset involves multiple POs, make sure all of the POs are in the PO Interface before you begin the process.

This is the Asset Information Entry screen, where you will input the physical information about the asset. In the background, all of the lines you have allocated for this record are "rolled together" financially into this single record.

Enter the SUID tag number (the last seven digits of the barcode tag) in the "Tag Needed" field. When completed hit the 'tab' key, creating the framework for the Asset Record and moving your curser to the Identifier Type field.

The identifier type field is where you can enter 'taggable' or untaggable' you can select an option, or type "T" and tab for Taggable, or "U" and tab for Untaggable. Continue tabbing until your curser is in the "Model" field. Enter the first 2 or 3 characters of the model number and then double click on the field. A list of choices will pop up, which includes all model numbers in the database that begin with those characters. This list is arranged alphabetically by manufacturer name. These combinations are referred to as "catalog items".

Note: Occasionally, a manufacturer may be in the system with two different spellings, so beginning by selecting the manufacture name could result in your not being able to find the model number. Since model number is a field required by the program, you will not be able to move the cursor from the model number field and will have to close the window, losing all of the work you've just done. Always start with the model number to avoid this.

Hint: Fields highlighted in yellow are mandatory.

In this example, the first two characters of the model number are "XE". When that is entered in the field, and we double-click, we get a list of all model numbers that begin with XE. Simply scroll down the list, highlight the manufacturer/model/description you want, then click the OK button.

Note: If the model number you need is not on the list, and you've verified that the number is correct, please contact your PPM to have the new model number added to the database. This is a real-time entry, and the selection will be immediately available for you to use.

Notice that all of the fields that pertain to the make and model automatically populate in the appropriate fields.

When entering the serial number, please omit any spaces, dashes, or other non-alphanumeric characters. This will facilitate searches based on serial numbers in the future.

If there is no serial number, please leave the field blank – do not enter "none", "NA", "NV", or any other entry of that sort. If you do, subsequent entries using the same model combination could run into difficulty, as the system will not permit catalog items with identical serial numbers.

Use the tab key to move through the next field, and allow "effective date" to default to the date you are entering the record. The acquisition date should be the date the item was physically received (or installation completed, if being installed by the vendor).

Activity status defaults to "In Service", which is correct unless you will be placing the asset into storage for at least thirty days.

The next field is the "Flags" field, which is optional. If you wish to enter the Flags field information, double-click in the "Flags" field.

A pop-up box appears with 6 fields. A "Y" or "N" must be entered into each of these fields, indicating whether the asset meets the specific criteria for each.

- **Capital** means the asset cost $5,000 or more (including tax & freight).

- **Sensitive** means the asset could contain electronic data, or is a high theft item.

- **Electronic Waste** means the asset requires special disposal to prevent electronic components from entering landfills.

- **Hazardous** means the asset will be used in a lab environment that is subject to biohazards or radiological contaminants and/or contains Freon.

- **Bulk** is rarely used. If the PO has 25 or more identical items, each of which is over $400, the items could be considered a bulk purchase. Contact your PPM if you think this may be the case.

- **Donated** is self-explanatory – contact your PPM though!!

Tip: You can navigate between the fields simply by hitting the down or up arrow on your keyboard.

Once all of the fields are populated with Y or N, you must SAVE the data by clicking on the blue save icon in the upper left corner.

Notice that the Flags field has populated with the corresponding first letter of each box marked with a 'Y'.

Next, enter the appropriate condition. Double-click on the field, and the 5 choices will appear. (New assets should be "good condition")

Next, enter the appropriate Business Unit, Owner, Department based on your department and the ownership of the asset. Contact your PPM if you are unsure which to choose.

Tip: Entering just the first few characters of any of these fields and hitting Tab will bring up a narrowed-down list of choices to select from, or will even auto populate the field if there is only one choice in the database that begins with that sequence.

The name of the primary DPA for the department will automatically populate in the DPA field.

The next field to complete is the Custodian field. The Custodian is the person who has control over the asset's use and movement – usually a PI or Administrative Manager.

To select the name, type the last name of the custodian into the "Last Name" field, and hit the Tab key. A list of all personnel with that last name will appear, as seen on the next page.

Note: The first field in the Custodian line is the employee ID number. Skip that field and go to the field for the custodian's last name.
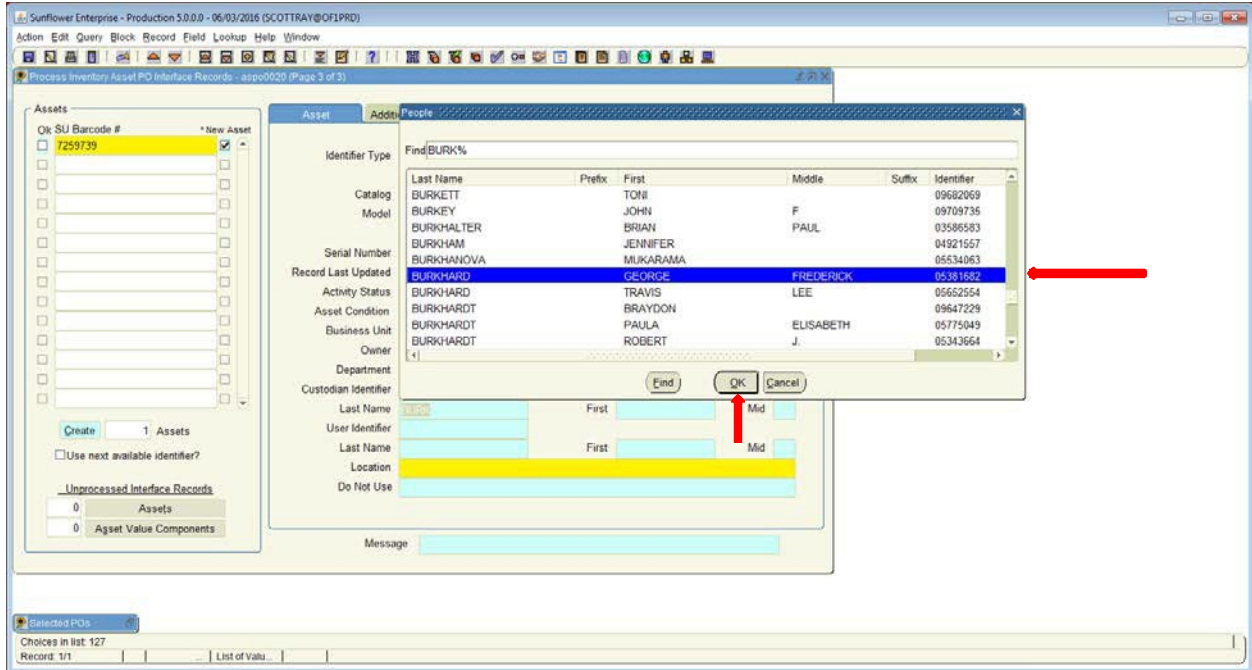
From the list that appears, highlight the name of the custodian and click the OK button. All of the custodian fields will populate accordingly, as shown on the next page.

User should be completed the same way as the custodian field. If the user is not a Stanford employee, or is a group of people, leave this field blank – there is an additional space for entering free-form user names.

Location is an important and required field. To enter a location, you must first double-click on the field, and a pop-up multi-part field will appear.

The multi-part location screen consists of 5 fields. "Quad" is where you enter the Quad number.

Double-click on this field for the list of quads. Highlight the quad you want and click OK.

There is a quad name/number conversion chart available at:
https://mapssecure.stanford.edu/sims/campus_queries/address.cfm

Next is "Building-Floor", which is the blank field underneath Quad. You can enter the number directly, or double-click for a list of buildings in the selected quad.

"Room" number is treated the same way as building – double-click and you get a list of all rooms in the selected building.

Note: Room numbers are in numeric order, but there's a catch – the order first lists all rooms that are purely numeric, then lists all rooms that are alphanumeric, and finally lists all rooms that are purely alphabetic.

Tip: If you already know the Quad, Bldg-Floor and room combination you can enter the numbers and hit tab to move quickly through each field.

Once all of the location fields are completed, be sure to SAVE the data by clicking on the blue save icon in the upper left corner.

Notice the information entered in the location screen populates as a string of data in the main record. By placing the cursor in this field, you can scroll left and right to view the data in the string.

You are ALMOST done.

Next click on the "Additional Details" tab at the top of the page.

When the new tab opens, look for the "Global User Fields" towards the bottom and double click inside the box.

This will open the final screen you need to complete.

In this tab you can enter additional description details and location detail. For example: if the asset was located in a box on a shelf on the right lab bench, you could enter that in the location detail section.

The other area of importance is the "Year Manufactured" box. Please complete this with the appropriate date and once finished click the "save" icon.
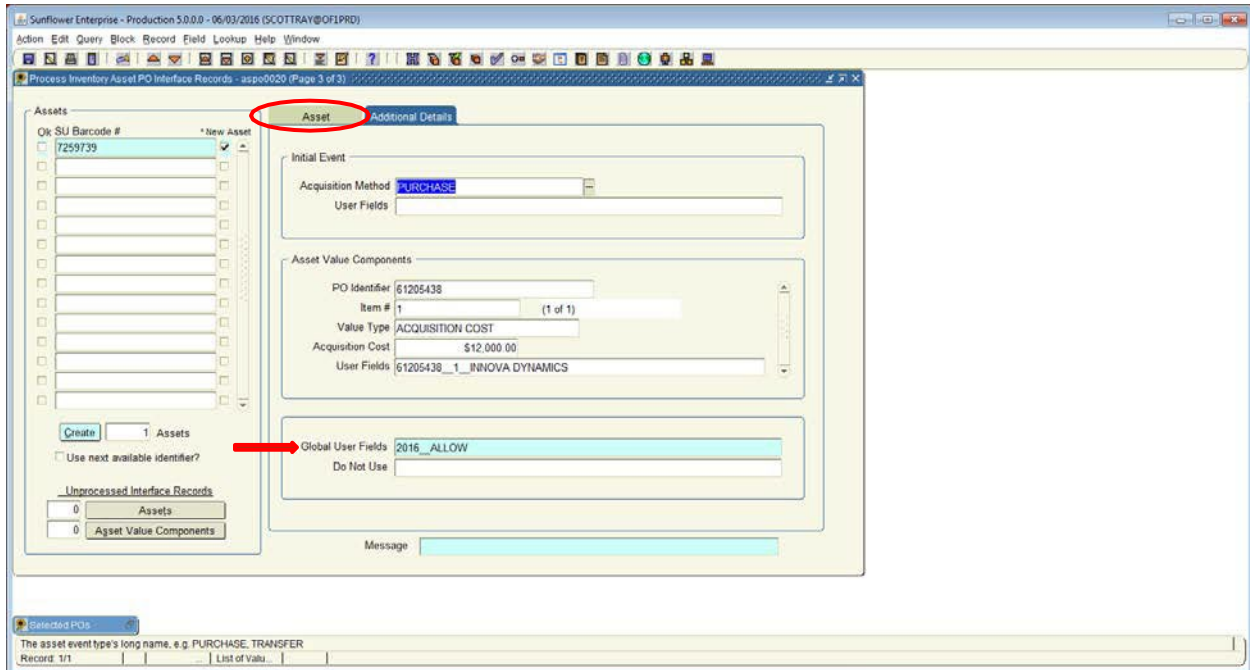
Once saved, you will return to the to the additional details tab.

Next click on the assets tab to return to the original page.

NOTE: The record is not yet saved.
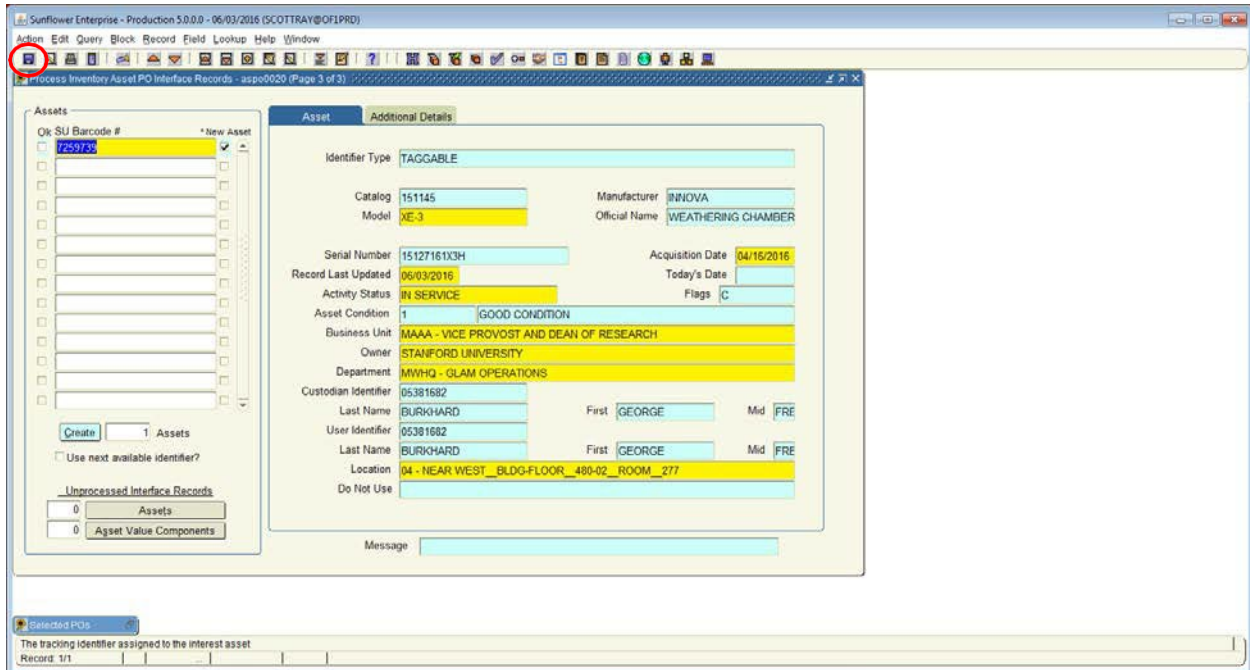
Review the information one final time and when ready, select the "save" icon to save the record.
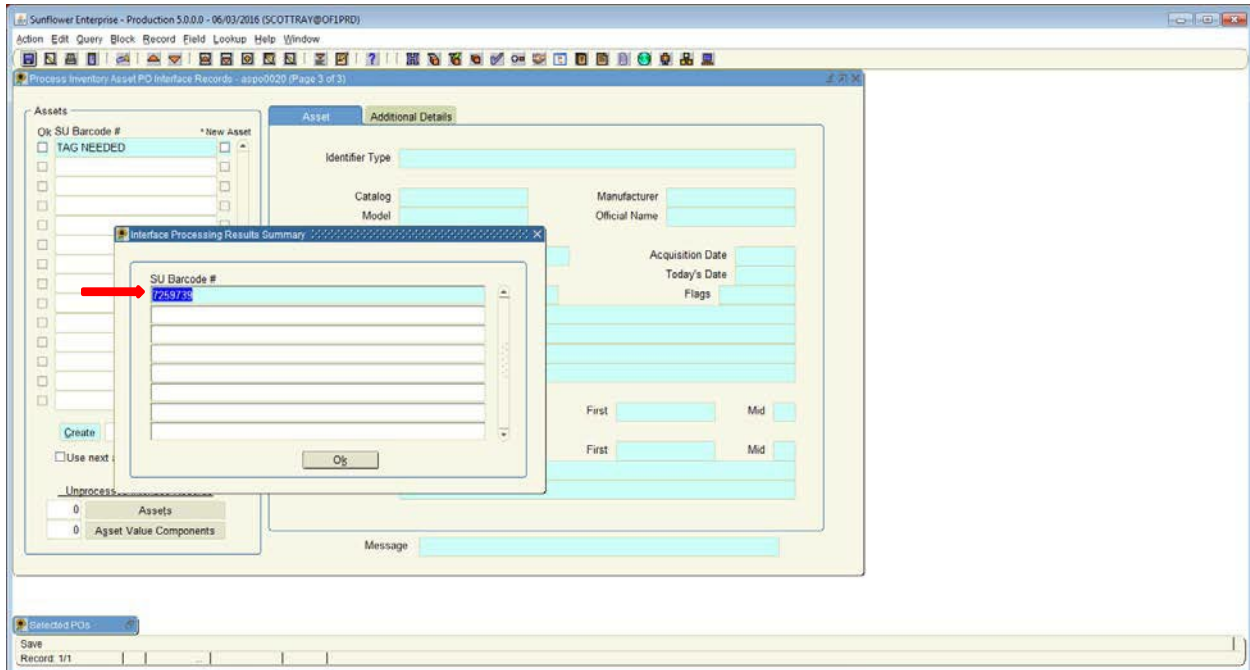
You will receive the confirmation above if the record saves correctly. If it does not save you will see an "N" on the far right of the pop-up box.
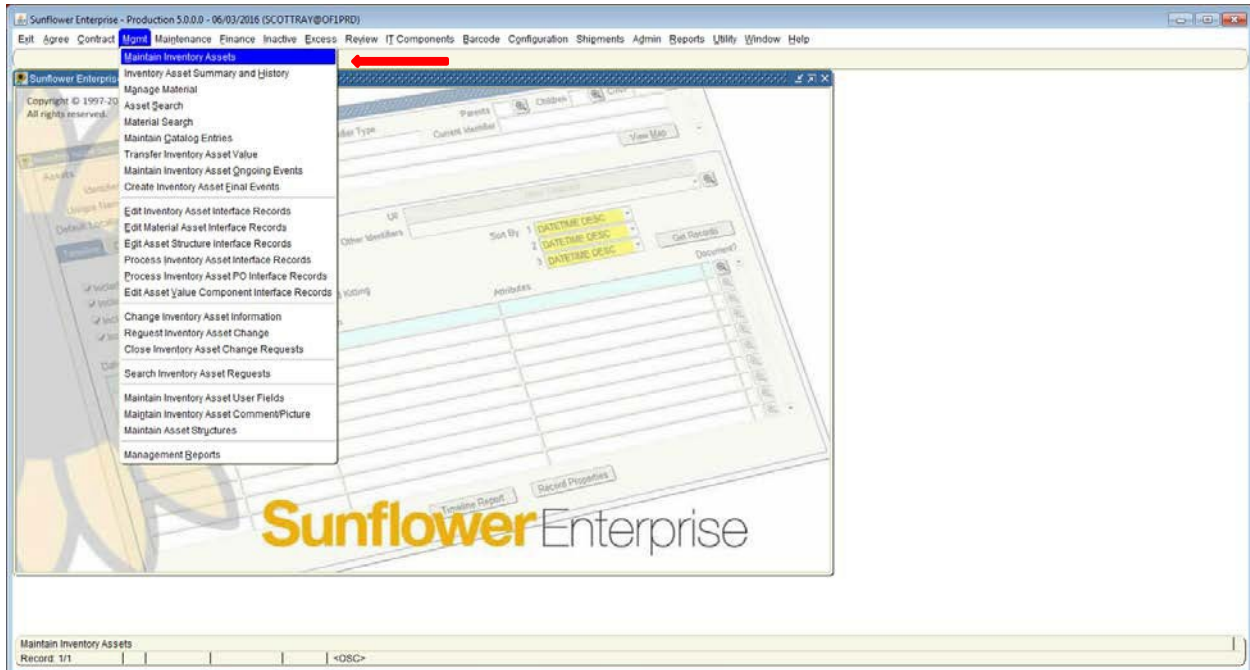
IF you would like to visit the newly created record. Close the open windows within Sunflower and to the "MGMT" tab and select "Maintain Inventory Assets".

A blank record will open.

Enter the new tag number and hit tab. The record will populate with the newly created asset information.

SUNFLOWER USER GUIDE

Creating an Asset Record from Scratch

For use with Stanford property
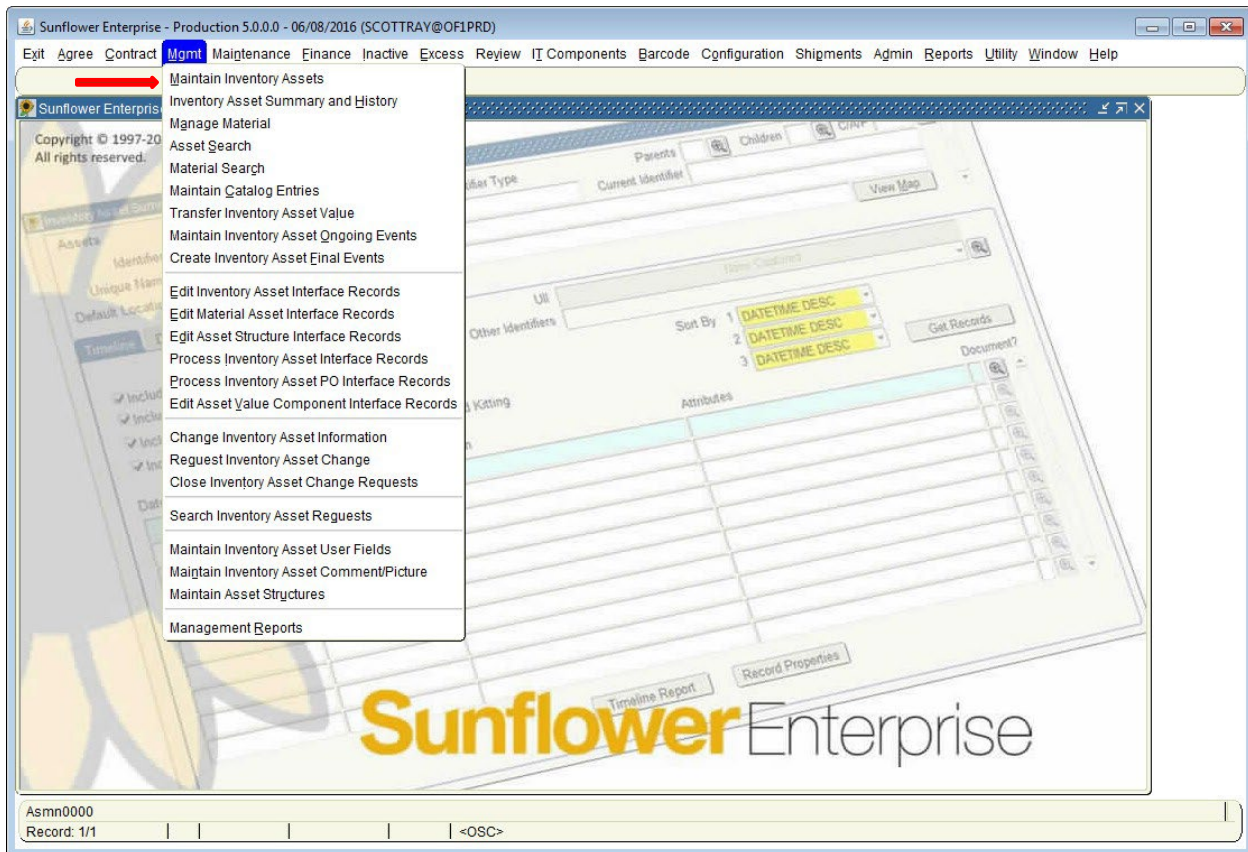
To create a record from scratch use the Maintain Inventory Assets from the Mgmt pull-down menu.

Note: If the PO information exists in the PO interface, please create the record in that module, in order to correctly capture the financial data that flows into Sunflower from the Oracle financial systems.

The screen that appears is also the screen you normally see for maintaining records, but all fields are blank.

Enter the SU Barcode tag number in the first field (SU Barcode #), then hit enter or tab.

The Acquisition Method and the Activity Status automatically default to Purchase and In Use – these can be changed to other values as needed when you get to them. The "existing interest asset" fields are not used, nor is default location, so skip those and place the cursor directly in the field for Model.
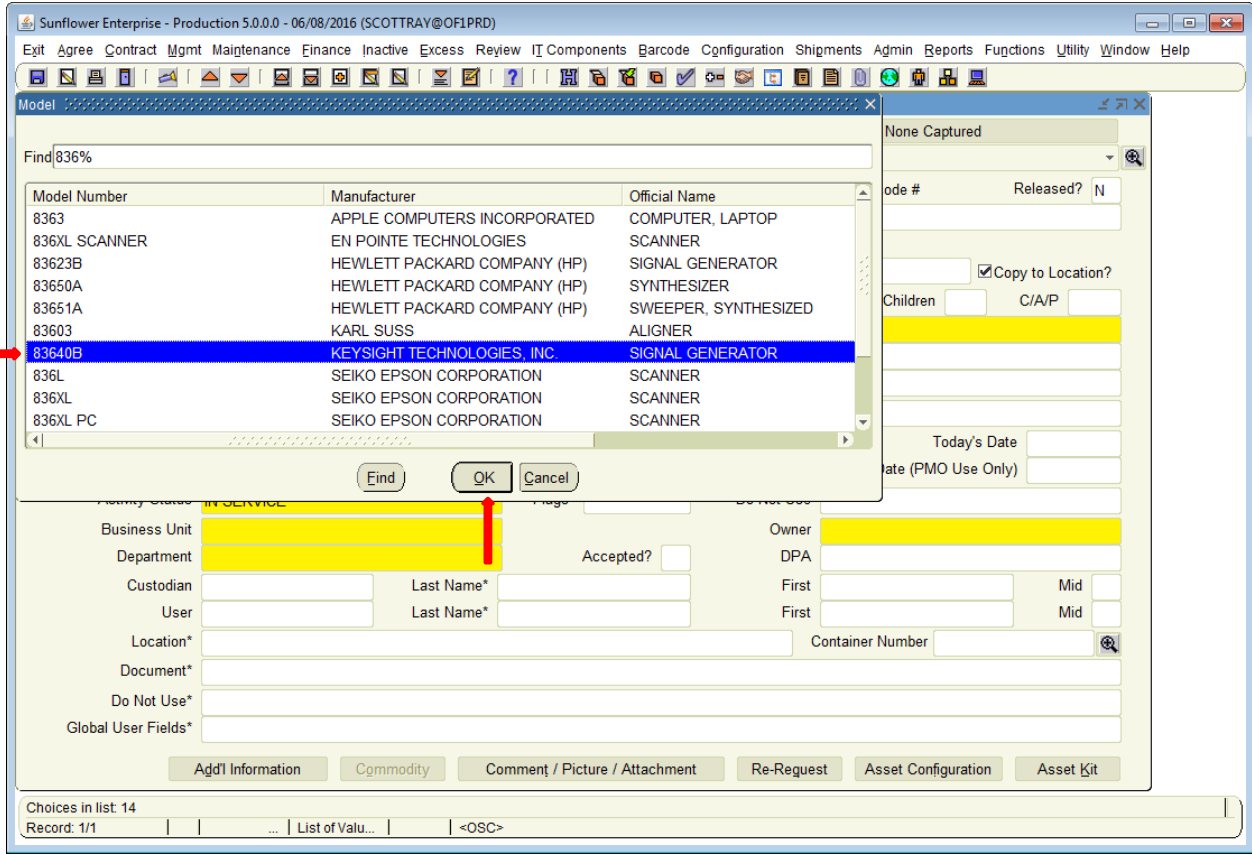
Enter the first few characters of the model number and then double-click on the field. The list of all catalog combinations that have model numbers beginning with those characters will appear. This list is arranged in alphabetical order by Manufacturer. Scroll through the list until you find the correct combination. Highlight that and click the OK button.

Note: If you do not see the combination you need, please contact your PPM and request a new catalog entry.

After you've selected the model combination, enter the serial number for the asset. If there is no serial number, leave the field blank.

Note: Serial number is one the most useful pieces of information you can enter for an asset. It can be used as a secondary verification method, should the Property tag fall off. Always ensure you record the serial number whenever possible.
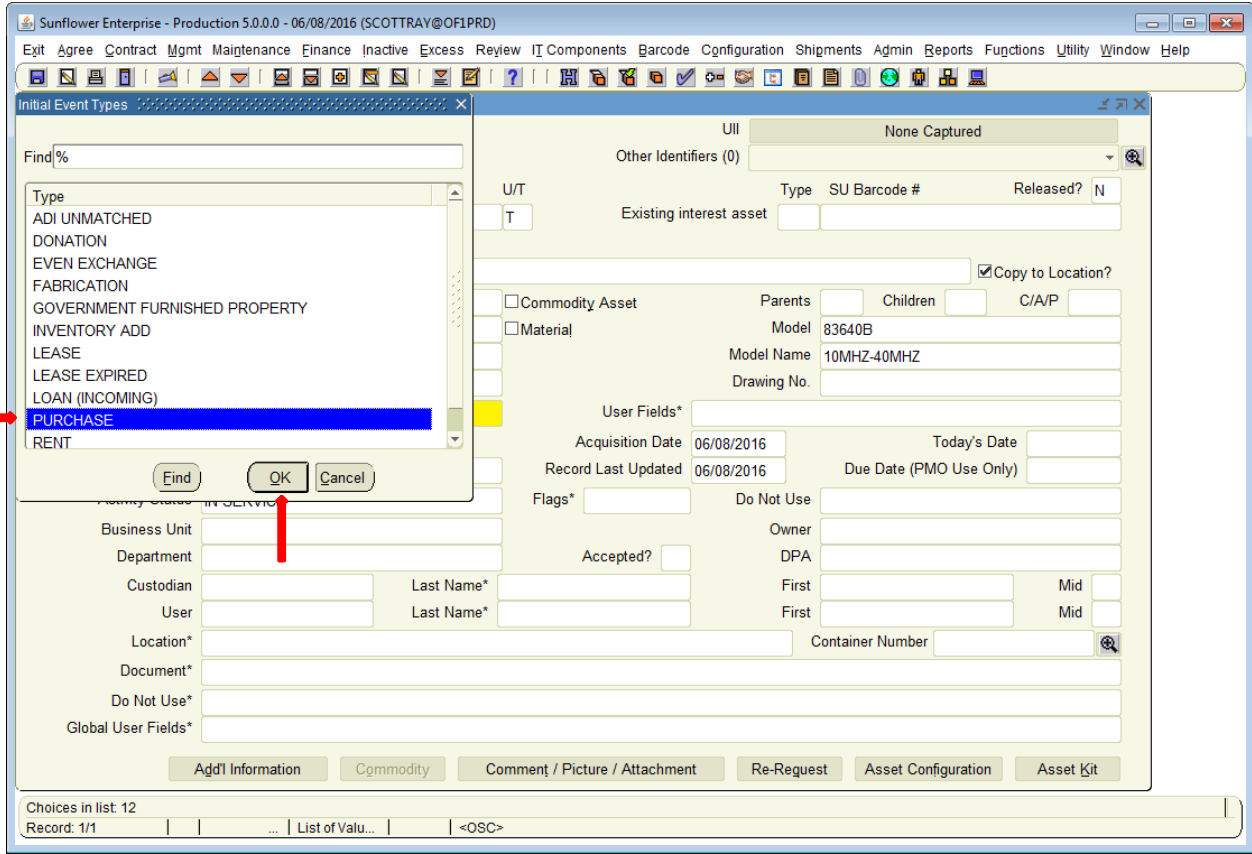
Acquisition method, as noted earlier, defaults to Purchase. If that needs to be changed, double-click on the field for acquisition method to obtain the list of values. Select the appropriate choice and click the OK button.

Next, double-click in the acquisition cost field to open a sub-window. Here you will enter the cost and purchasing information for the item.

Note: If this is a capital asset, it is important that the correct purchase information be entered here for reconciliation by the Property Management Office.

Enter the cost (including tax and freight) and then double-click on the Purchase Information field. This will open a window for entering purchase order information.

In this window, enter the PO number. There are also fields to record the purchase account number (project and task) and funding source award number.

Even if the record is non-capital, or for departmental use only, it's a good idea to at least enter the PO number in the record. Much information can be found on the PO.

After entering the data in the various fields, click on the *SAVE* icon.

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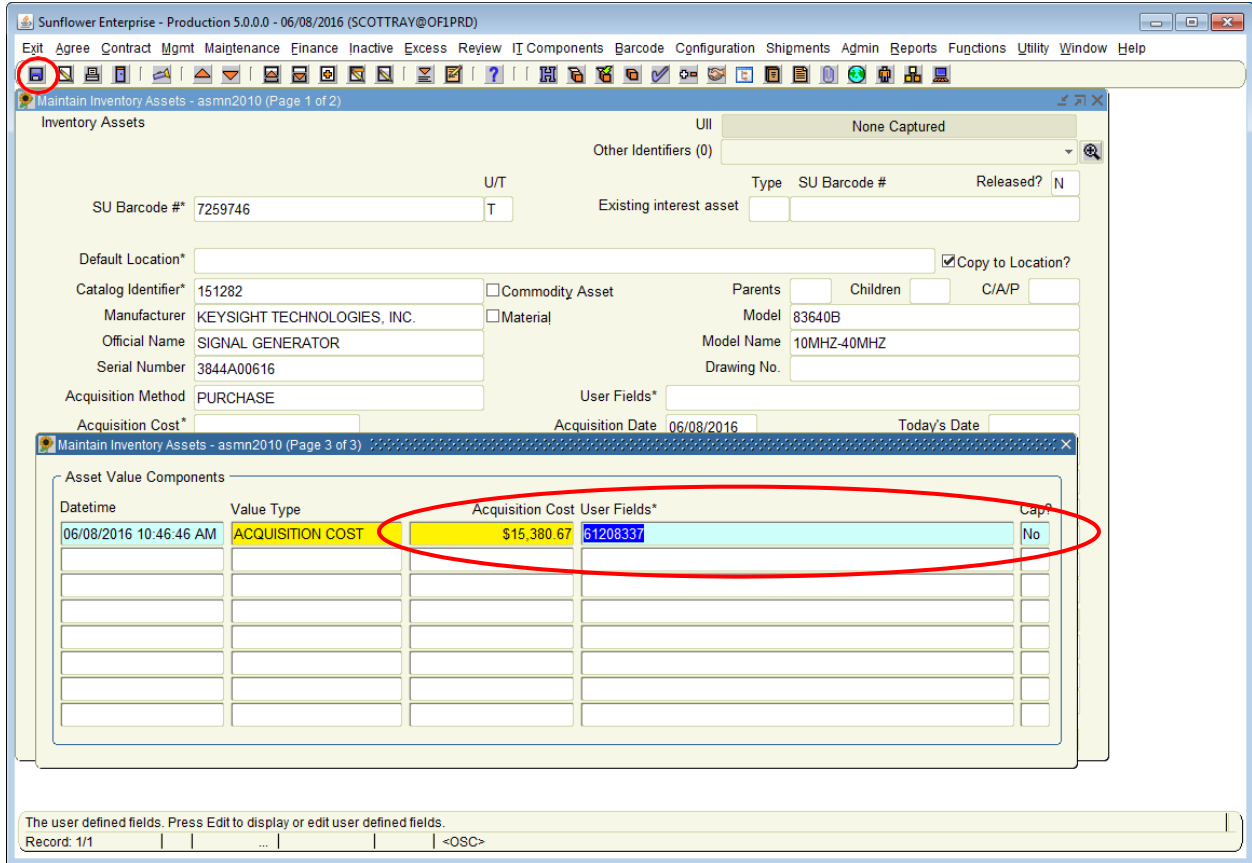
When you save the submenu for PO information, the data becomes a string in the Asset Value Components window. The "Cap?" box defaults to no – just ignore it, we don't use the Sunflower financial module.

Now click on the *SAVE* icon again, to save the entire block of acquisition cost data.

Next is the Acquisition Date – this is the date the item is physically received. If the asset record is for a non-capital item, this can be approximate – otherwise it should be as exact as possible. Ideally, this date should match the receiving date in the purchasing system.

The "Record Last Updated" and "Not in Use" date fields have no benefit or effect for the university, but are required by the application, so let them default to the current date.
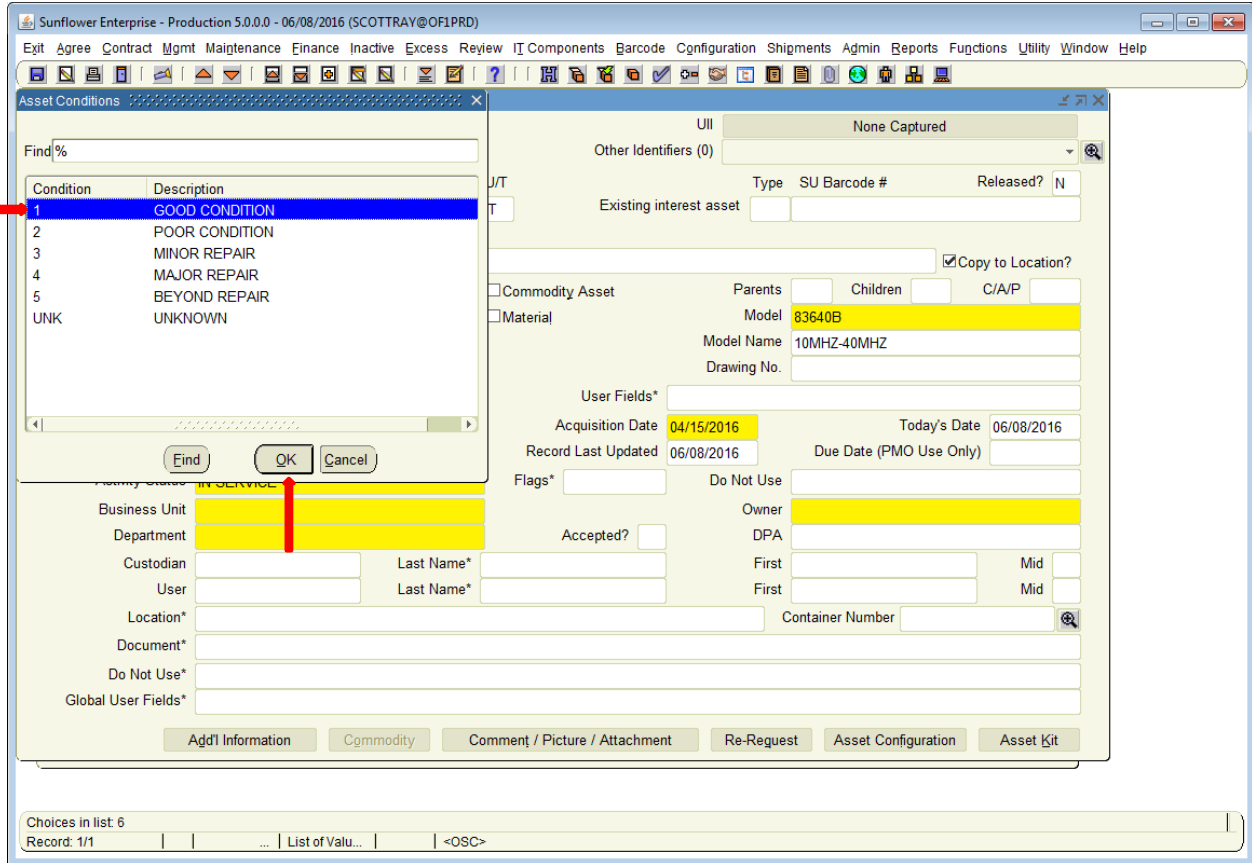
Asset condition is usually "Good" for a new acquisition. Double-click on the field for the list of choices, or simply enter the appropriate number (1 for Good) in the first condition field and hit TAB. The condition description will populate automatically.

The screen defaults to "In Service" for the Activity Status. If the asset will be in storage, or otherwise not in use for an extended period of time, double-click on this field and select "Inactive". (Please do not use Excess as an activity status – that is automatic when the excess record is completed.)

Flags is an optional form, if you wish to include this information, double-click on this field to access the sub-window.
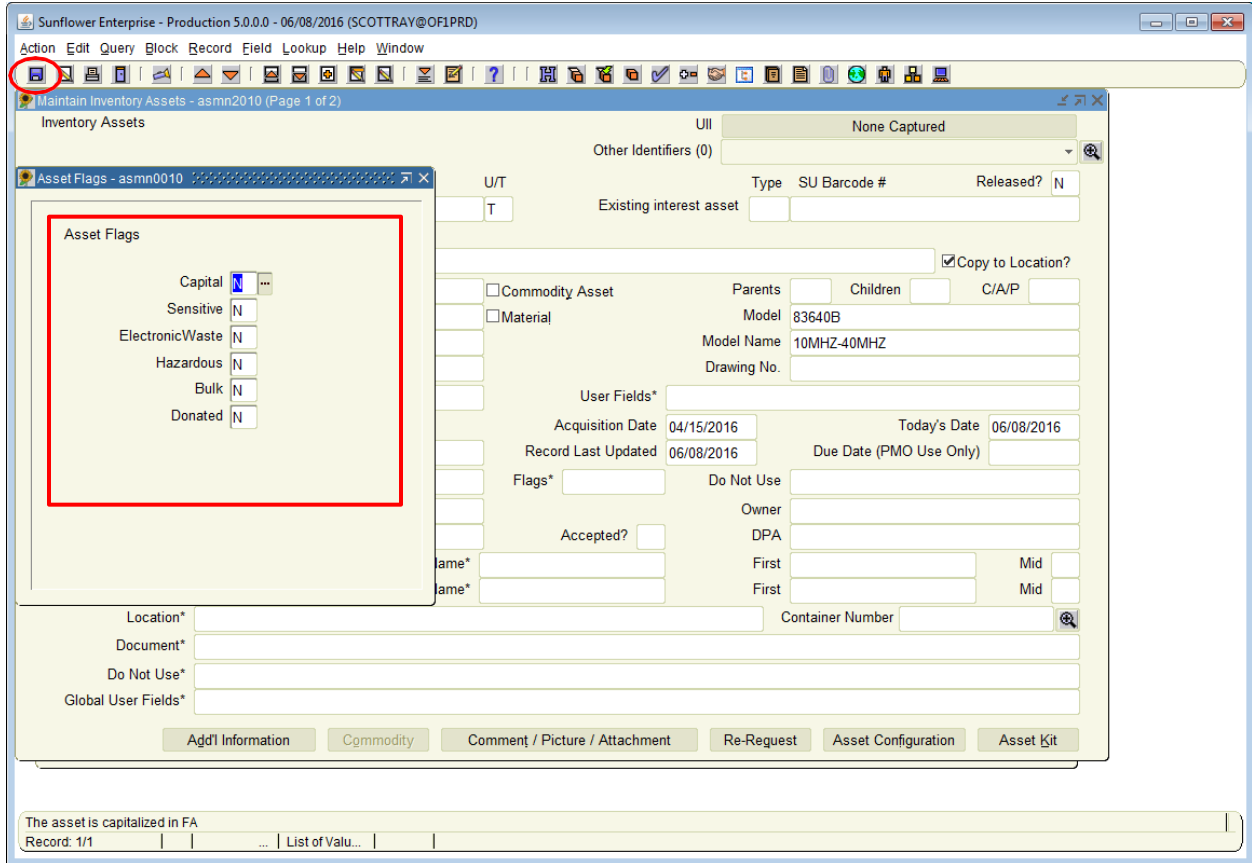
Enter a **Y** or **N** in each of the boxes as they pertain to the asset.

Capital – $5K or more (incl. tax and freight) and useful life over one year

Sensitive – capable of holding data or electronic information

Electronic Waste – contains electronic circuitry so requires recycling

Hazardous – will be used in a biohazard or radioactive lab setting and/or contains Freon

Bulk – Contact PPM before using, requires approval – see property manual

Donated – the equipment was donated to the university

After entering an answer to each of the criteria, click on the SAVE icon to save the attributes.

Tip: You can use the down arrows to quickly navigate through each box.

After saving the flags, the field will populate with the first letter of each of the attributes that apply (for example C = <u>Capital</u>).
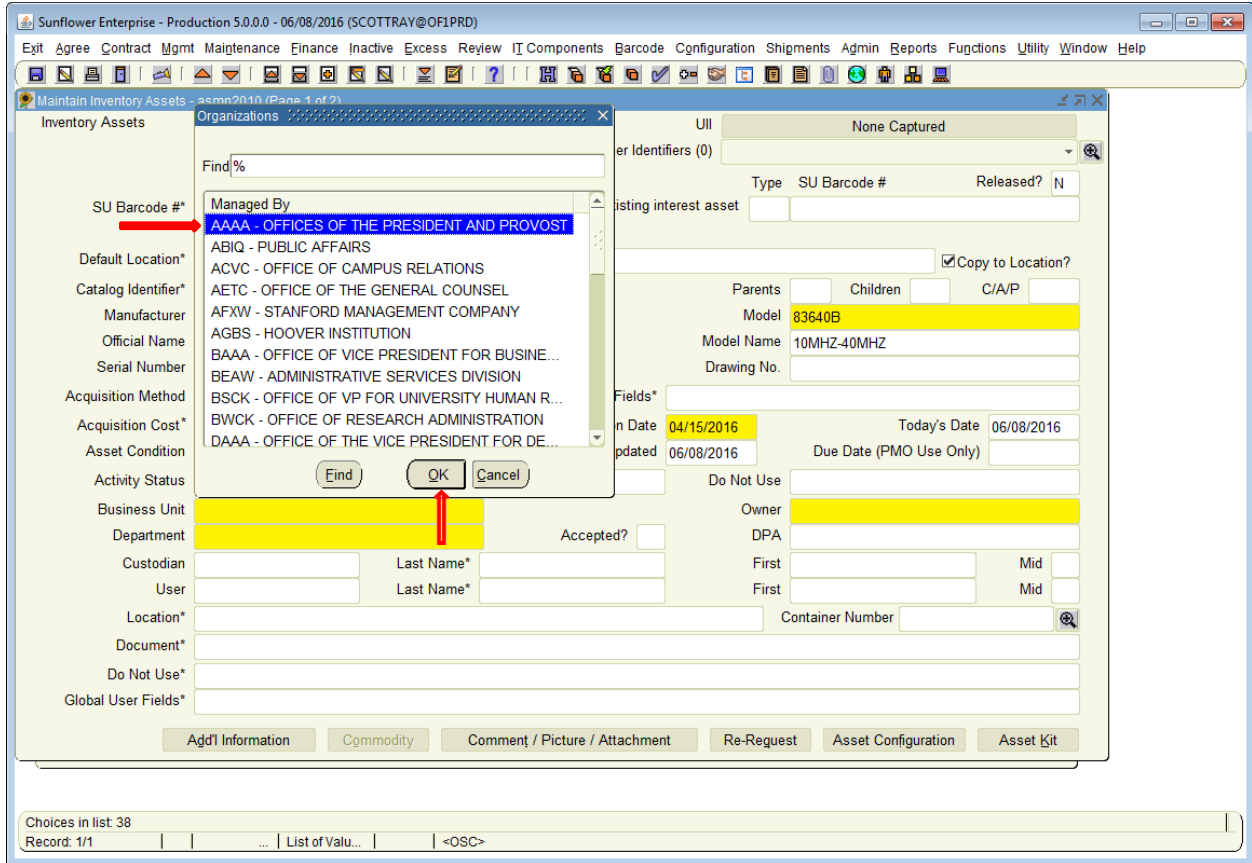
Business Unit is the overarching area of the University that your departments falls under. These are high-level organizations such as a School or major Administrative group. Either double-click on the field for the entire list, or enter the first few characters to narrow it down for faster selection.

Double-click on, or highlight the correct choice and hit OK to complete the field.
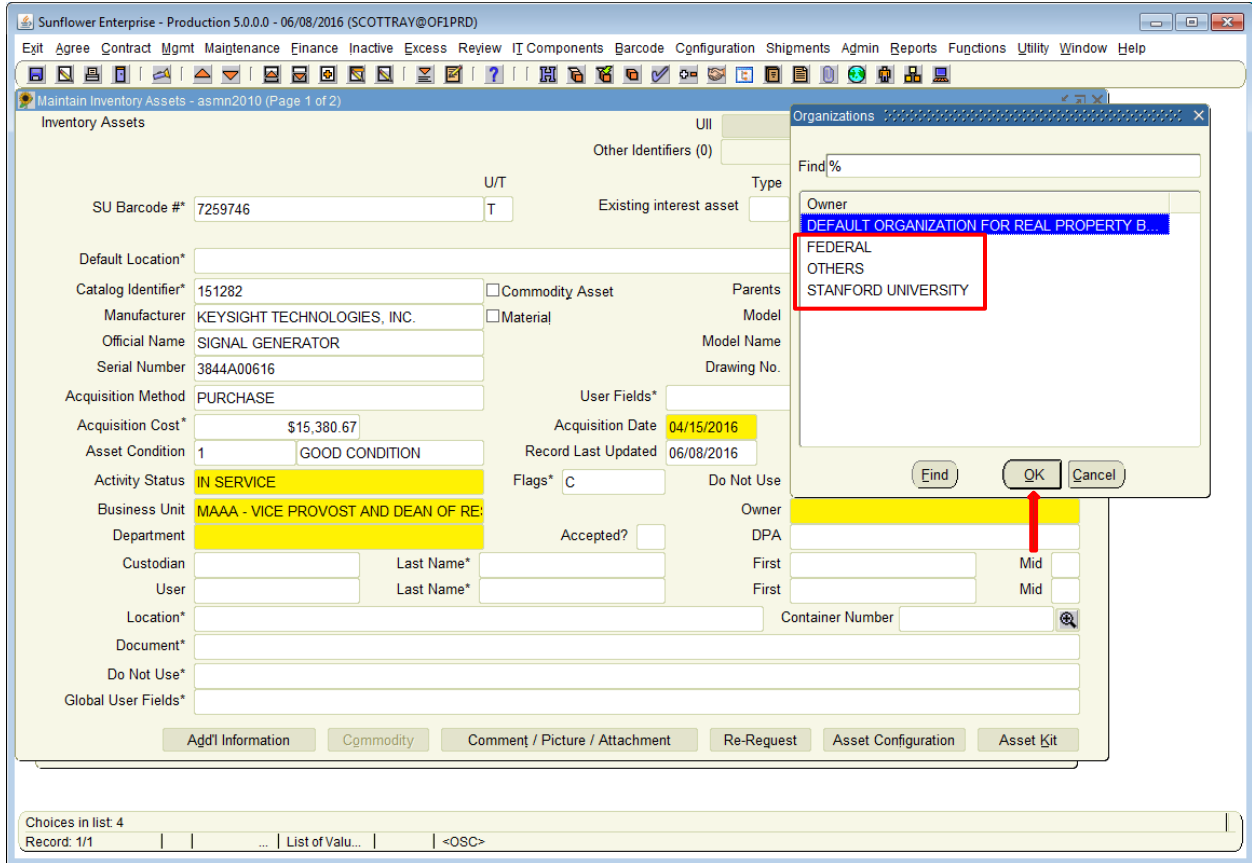
The next field is Owner, which can be one of three choices: "Stanford University", "Federal", or "Others". Select from the double-click list of values and hit OK,

Hint: As a shortcut, simply enter the first letter of the choice you want (S, F, O) and hit TAB.
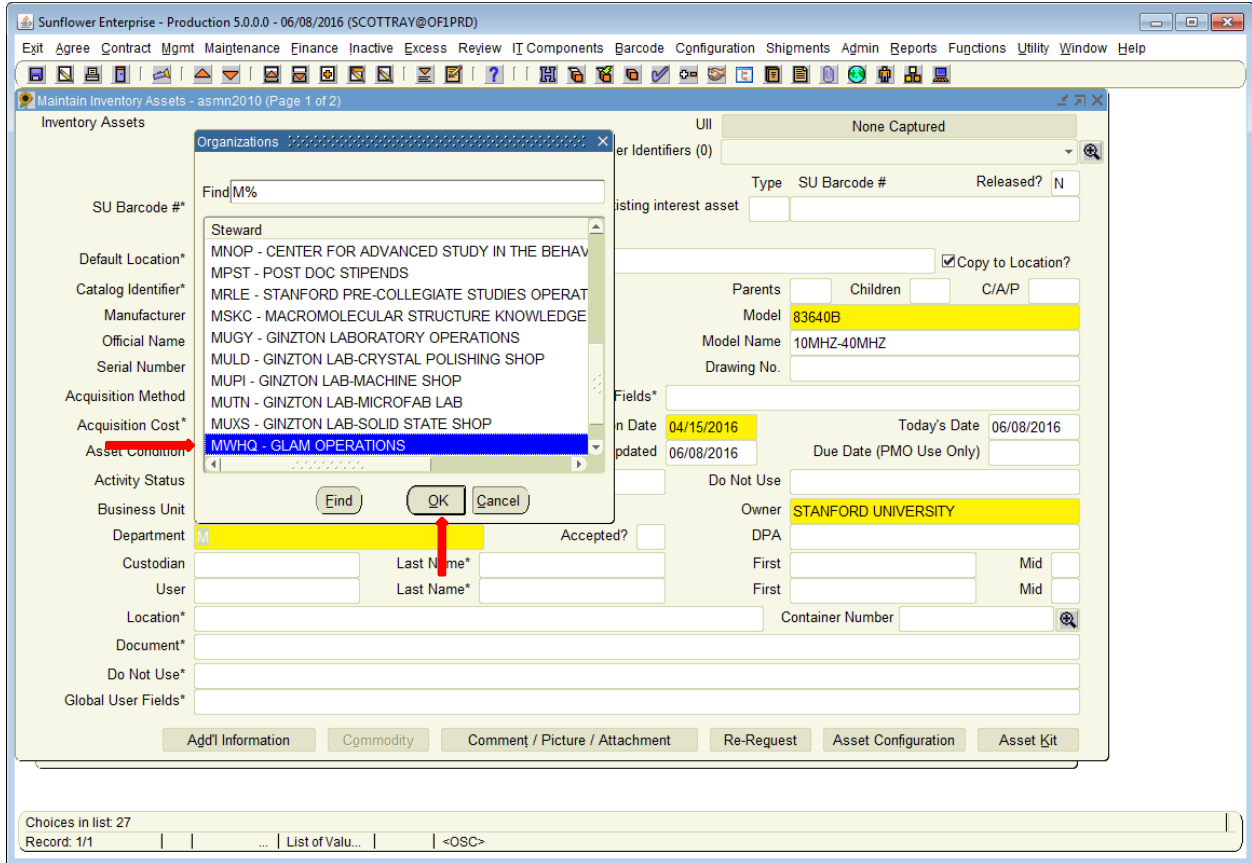
Now enter your Department name in the Department field (aka Steward). Again, you can either type in the name, or double-click in the field and select from the list of values.

Typing the first few characters before double-clicking (or hitting TAB) will bring up a shorter list for faster selection.
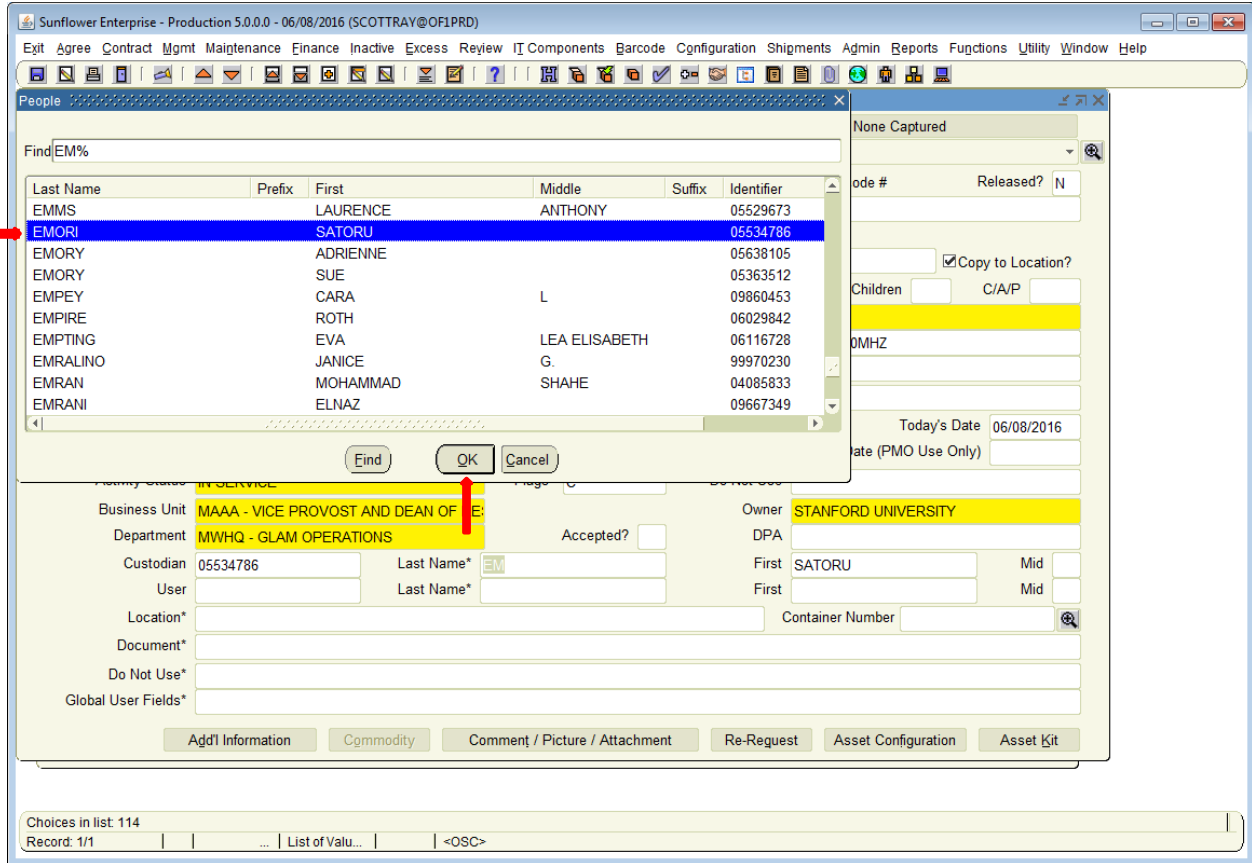
Enter the last name (or first few characters) of the Custodian into that field and hit TAB. From the resulting list of values, select the correct name and double-click on it or hit the OK button.

The custodian should be the person who has authority over the use, movement, and ultimate disposition of the asset. This could be a PI, a lab manager, or office administrator. It must be a permanent employee of the University (not a student or a temporary affiliate).

Do the same for the User, if desired (this is an optional field). This should be the day-to-day user of the item. The only requirement for user is that they be in the Human Resources system (PeopleSoft).

Note: To record a group or a non-Stanford user, there is a free-form field in Global User Fields that can be used for that.

The multi-part location screen consists of 5 fields. "Quad" is where you enter the Quad number. Double-click on this field for the list of quads. Highlight the quad you want and click OK.

Next is "Building-Floor", which is the blank field underneath Quad. You can enter the number directly, or double-click for a list of buildings in the selected quad.

Tip: If you already know the Quad, Bldg-Floor and room combination you can enter the numbers and hit tab to move quickly through each field.

"Room" number is treated the same way as building – double-click and you get a list of all rooms in the selected building.

Note: Room numbers are in numeric order, but there's a catch – the order first lists all rooms that are purely numeric, then lists all rooms that are alphanumeric, and finally lists all rooms that are purely alphabetic.

When all information has been entered, select the "Save" icon to return to the main screen.

After location information has been entered. You will see the full Quad-Bldg.-Floor-Room combination listed within the location field on the record.

Finally, select "Global User Fields" towards the bottom and double click inside the box.

This will open the final screen you need to complete.

This is where you can enter additional description and location detail information. You need to also note the year of manufacture.

Once finished, click on the "Save" icon and you will return to the record.

Once you return to the record, you will see the full list of information entered in the Global User Fields.

To save the record, click on the "Save" icon one final time and the record will be saved.

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Sunflower Asset Record Maintenance
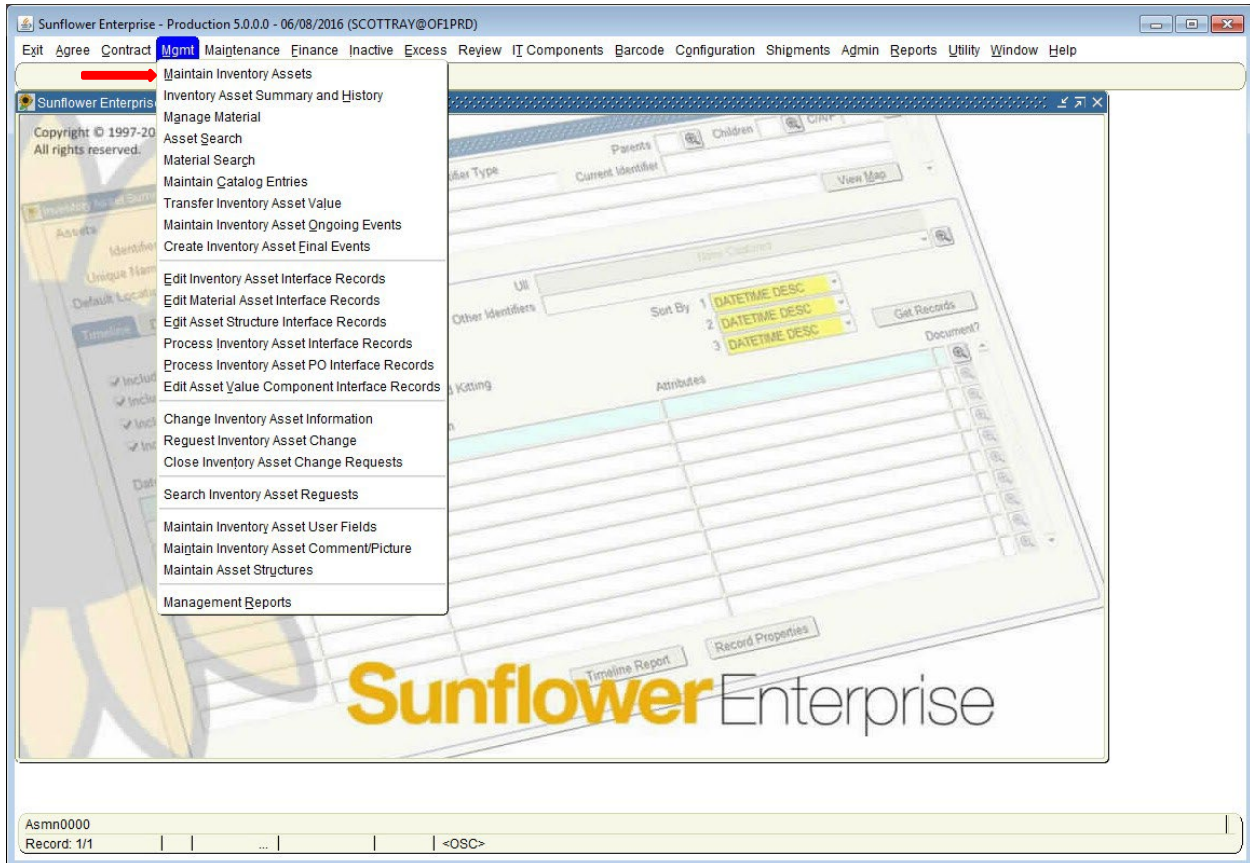
To change or update information in the Sunflower record, access the record through the Mgmt pull-down menu, selecting "Maintain Inventory Assets"

Enter the tag number of the record you want to access, then hit either Tab or Enter.

The record fields will populate with the current data.

Most of the fields are available for updating, with some notable exceptions. Among those fields that are protected from update are:

- Cost and purchase data
- Department Name (unless you are authorized for both depts.)
- Mfr/Model/Description (catalog combination)

To change these elements, contact your PPM. However, other fields, such as location, custodian, user, activity status, and the global user field, can be updated at any time.

Simple fields, such as serial number, can be updated simply by deleting the current data, entering the new information, and clicking the Save icon. More complex changes, such as Custodian, Location and Flags, require opening the sub-window, changing the data within that window, and re-saving the record.

Changing Custodian is a common update to a record. To change the custodian name, simply highlight the current last name, delete it, and type in the new last name. Then hit Tab or Enter, and the list of people with that last name will appear.
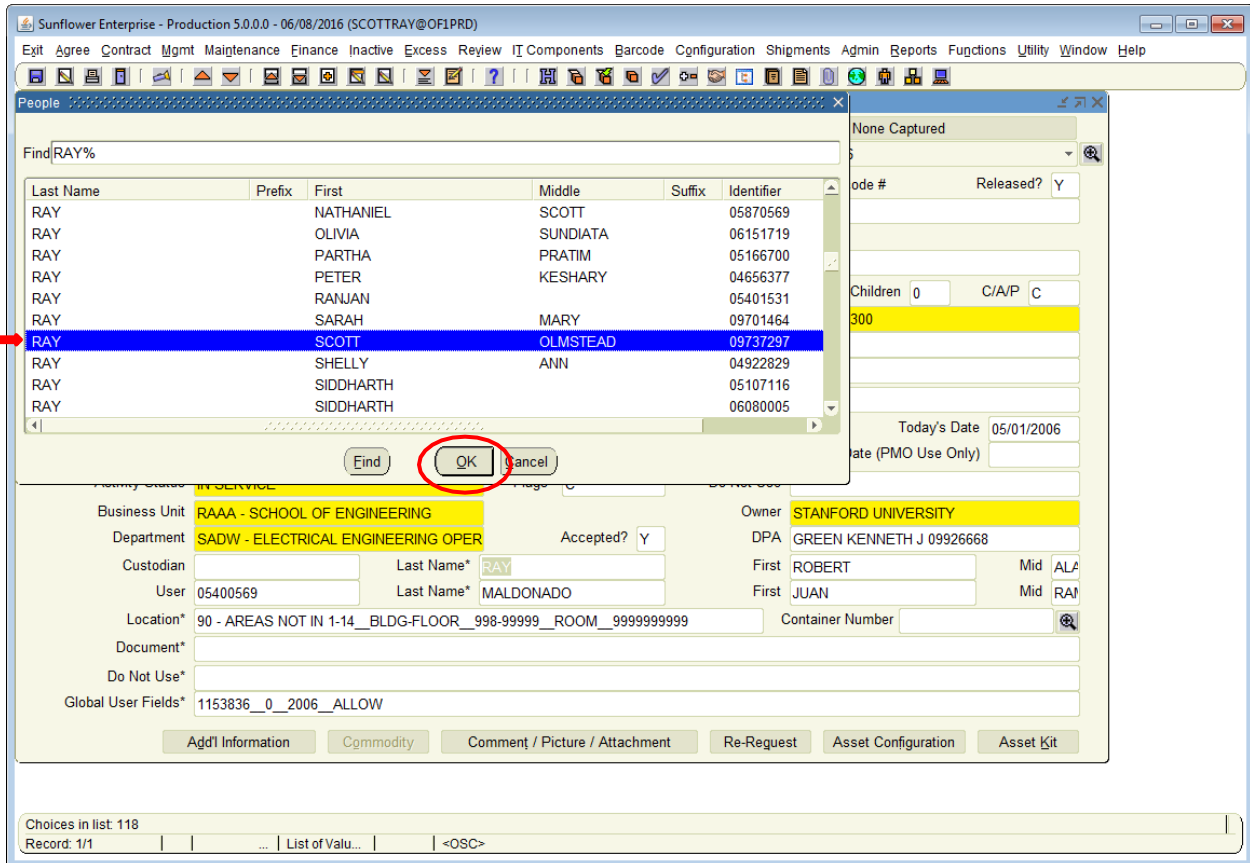
Scroll down the list until you find the name you want to have on the record, and click OK (or you can double click on the desired name – either way works)

Hint: If unsure of the spelling, try entering just the first few characters of the name – the list will then include all names that begin with that combination of characters.
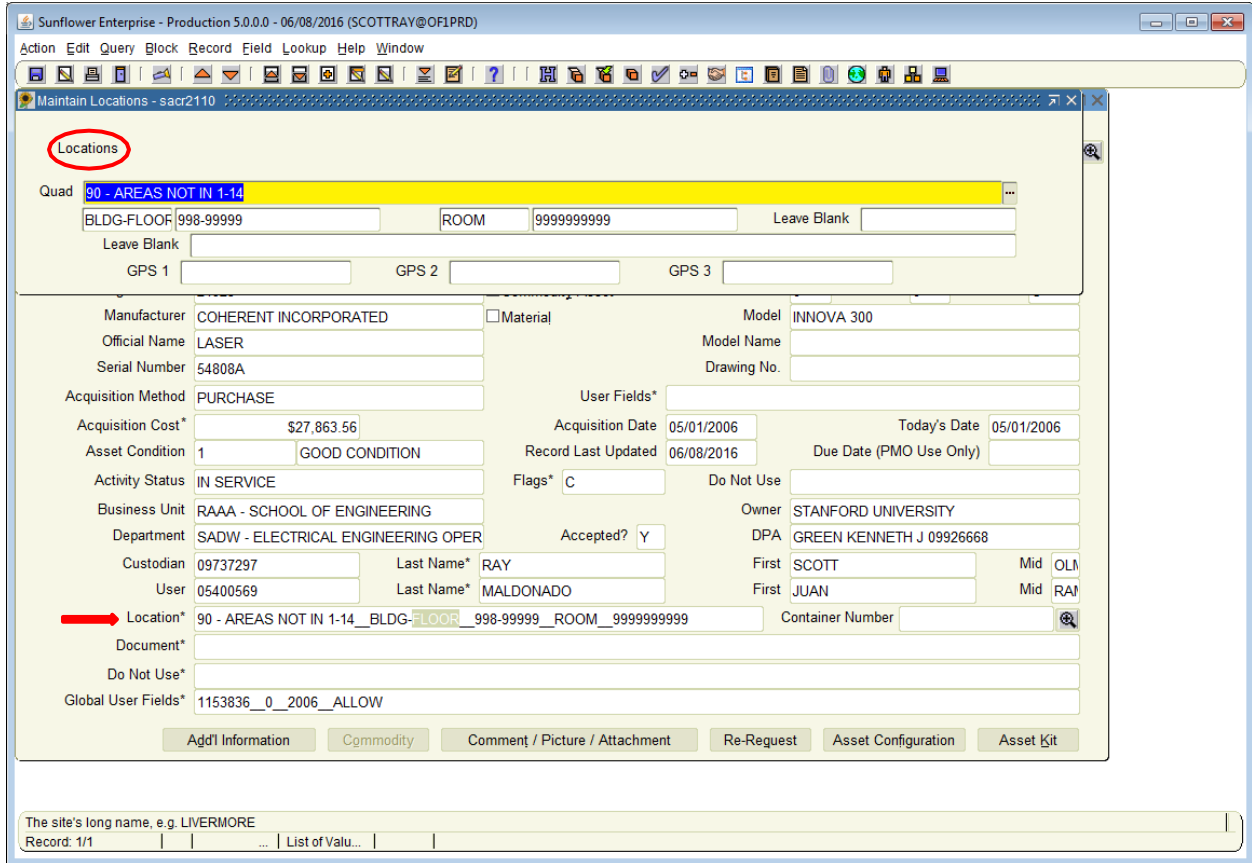
The new name is now in the record. Click on the SAVE icon if you are done.

(If you try to close the application or the active window without saving the new information, the system will prompt you to do so before closing the window.

To change User, follow the same steps.

Changing the Location is just as simple – double click on the existing location to pop up the sub-window in order to update the individual data elements.

Update the Quad, Building-Floor, and Room fields as needed, then click on the SAVE icon.

The new location information replaces the old in the string of location data in the main window. You still need to save the main record, though, so click on the SAVE icon again.

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If you want to change elements of information in the Global User Fields; double click on the field to expand its sub-window.
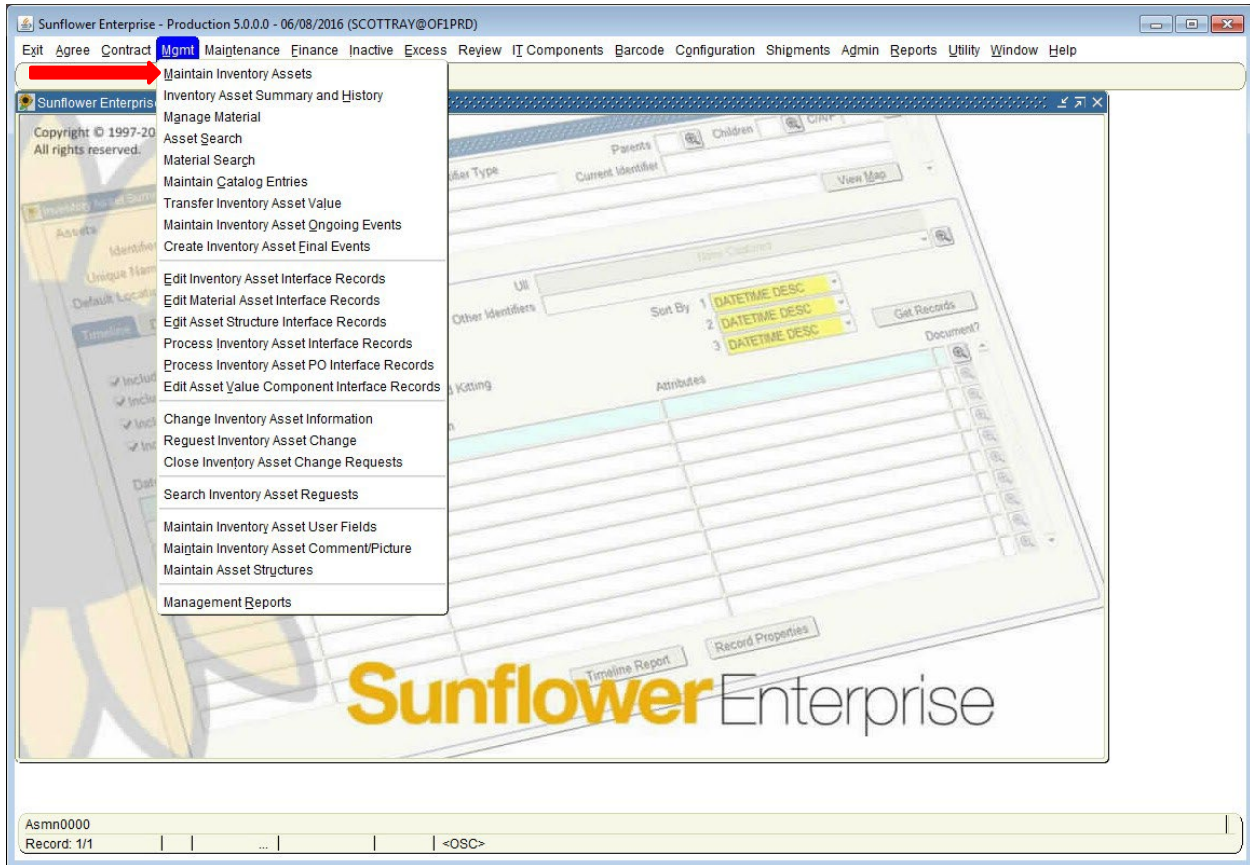
Here you can change the "Other Description", "Location Detail", "Department Tag Number", the Year of Manufacture, or the maintenance/calibration dates.

The other fields in this view are auto-populated by the Oracle FA system, so are not changeable in this application. (FA Asset ID, Net Book Value, IDC Flag and Retirement information are all overwritten nightly – do not change the information in these fields)

SUNFLOWER USER GUIDE

Attaching documents and photos

When in Sunflower, select the MGMT tab and Maintain inventory assets.
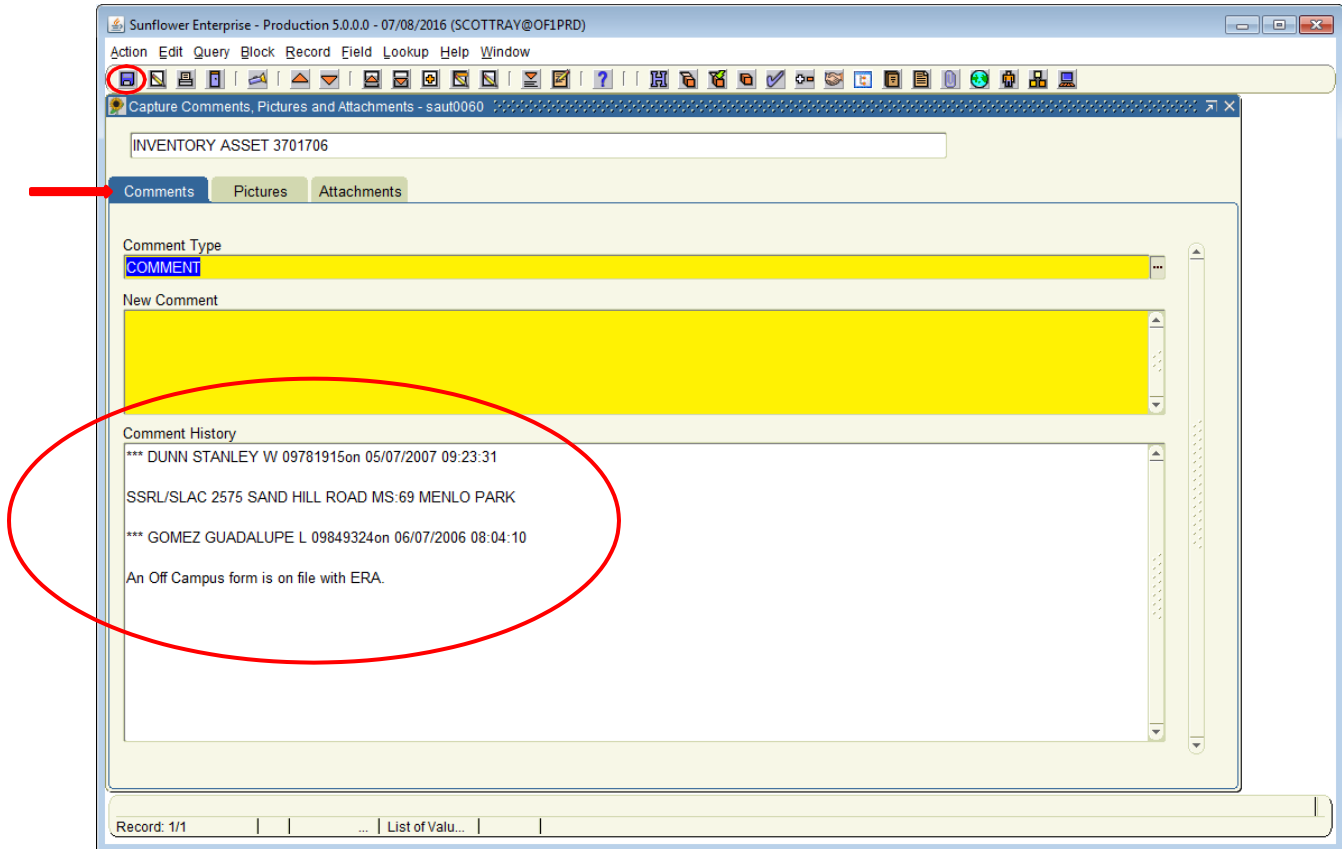
Enter the tag number of the record you want to access, then hit either Tab or Enter.

The record fields will populate with the current data.
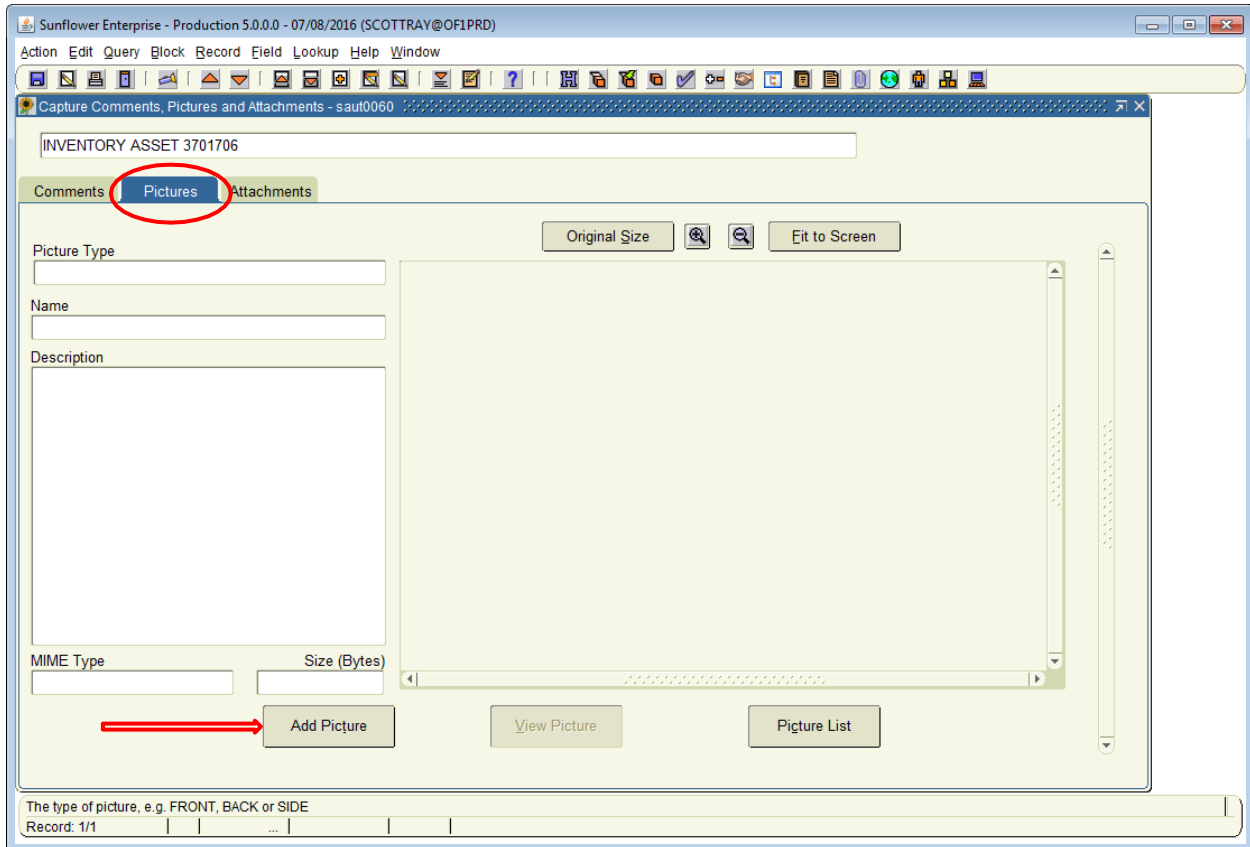
Click on the Comment / Picture / Attachment tab at the bottom of the record.

The next screen opens with the COMMENTS tab already selected. Here you can view and add notes, or any information specific to the record.
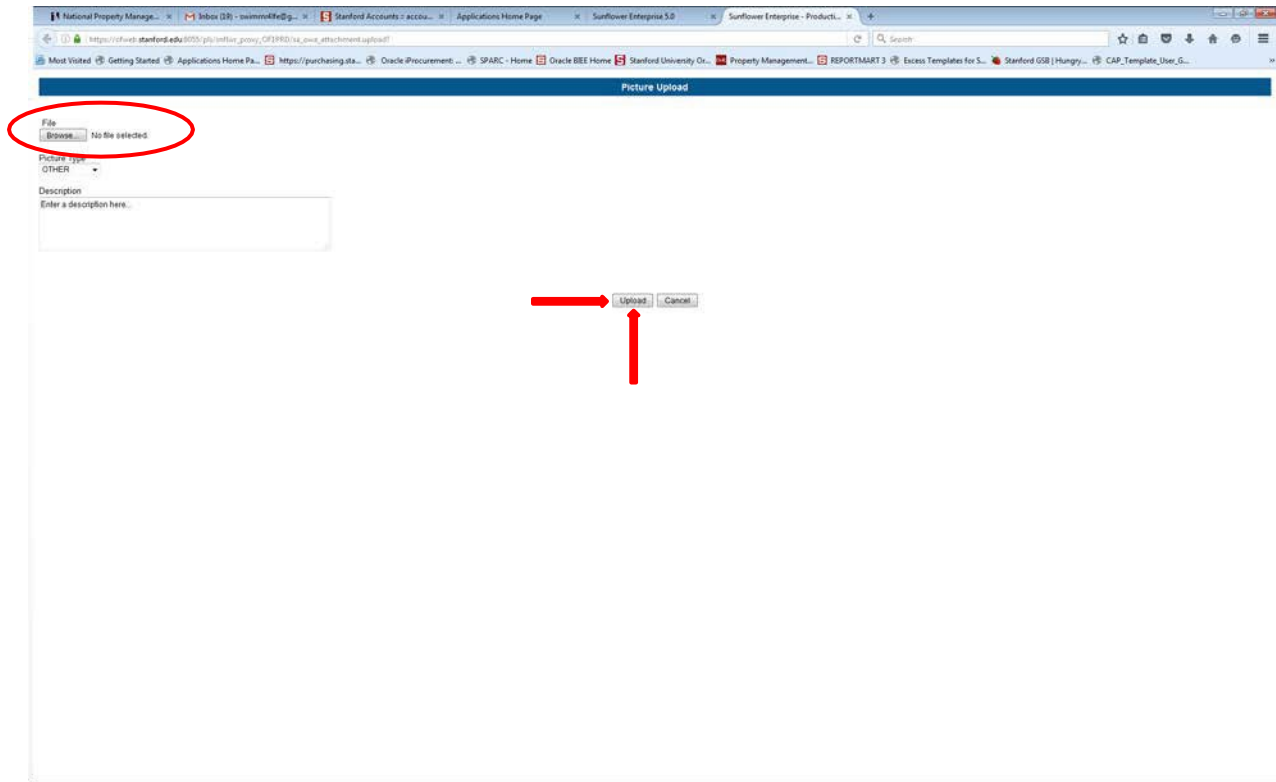
If you wish to enter a new comment, type or paste the comments in the large yellow box. To save, select the disk icon at the upper left of the record.

To add pictures, open the record, select the Comment / Picture / Attach tab and the Picture tab. Once inside, select Add picture
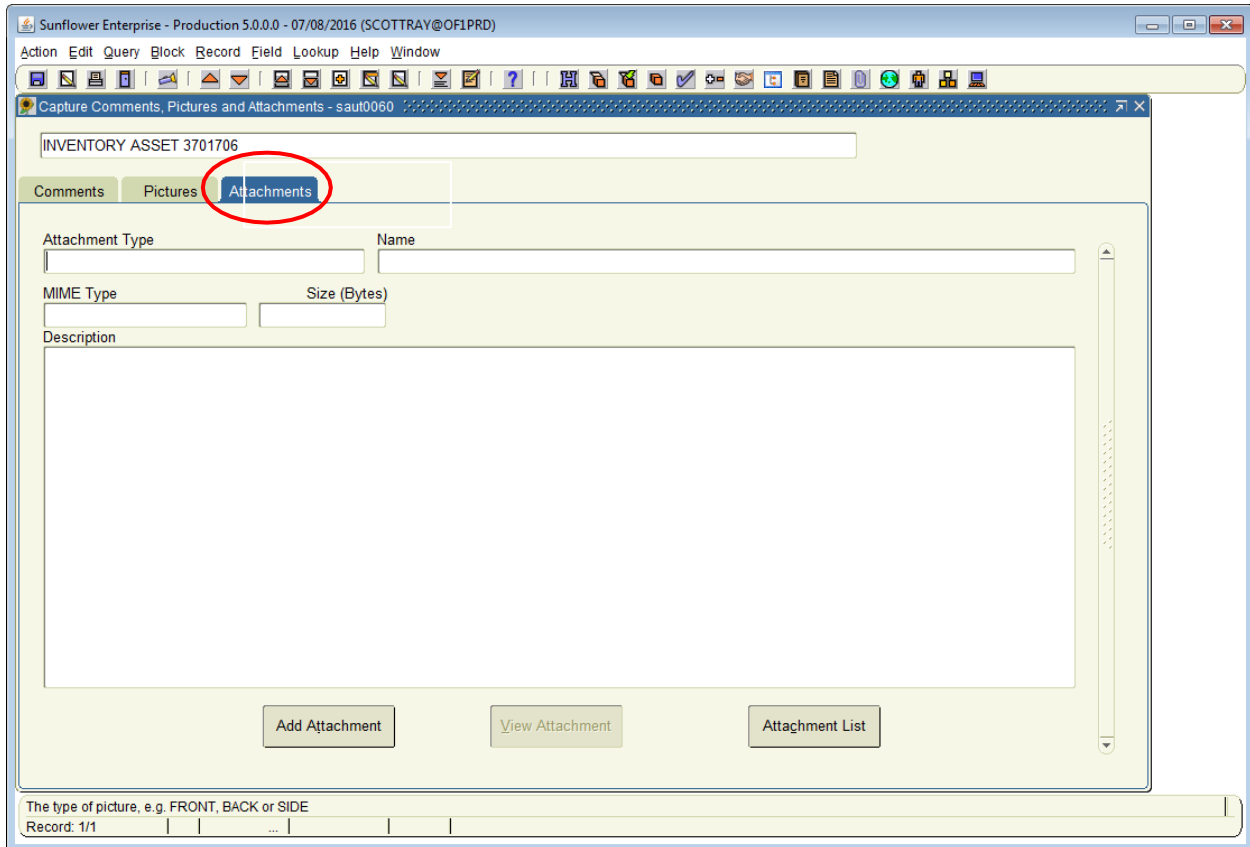
Next, you will be prompted to browse for your file. Once you select your file, select UPLOAD.

Once added, you will be prompted to re-query the picture. Go ahead and select cancel.

Then select the save icon and the picture is automatically saved to the record.

Attachments are done the same way as pictures, but instead of picture, you are looking to attach a supporting document.

You will see all the same screens that you would for a picture with the only difference being that this is for a document.