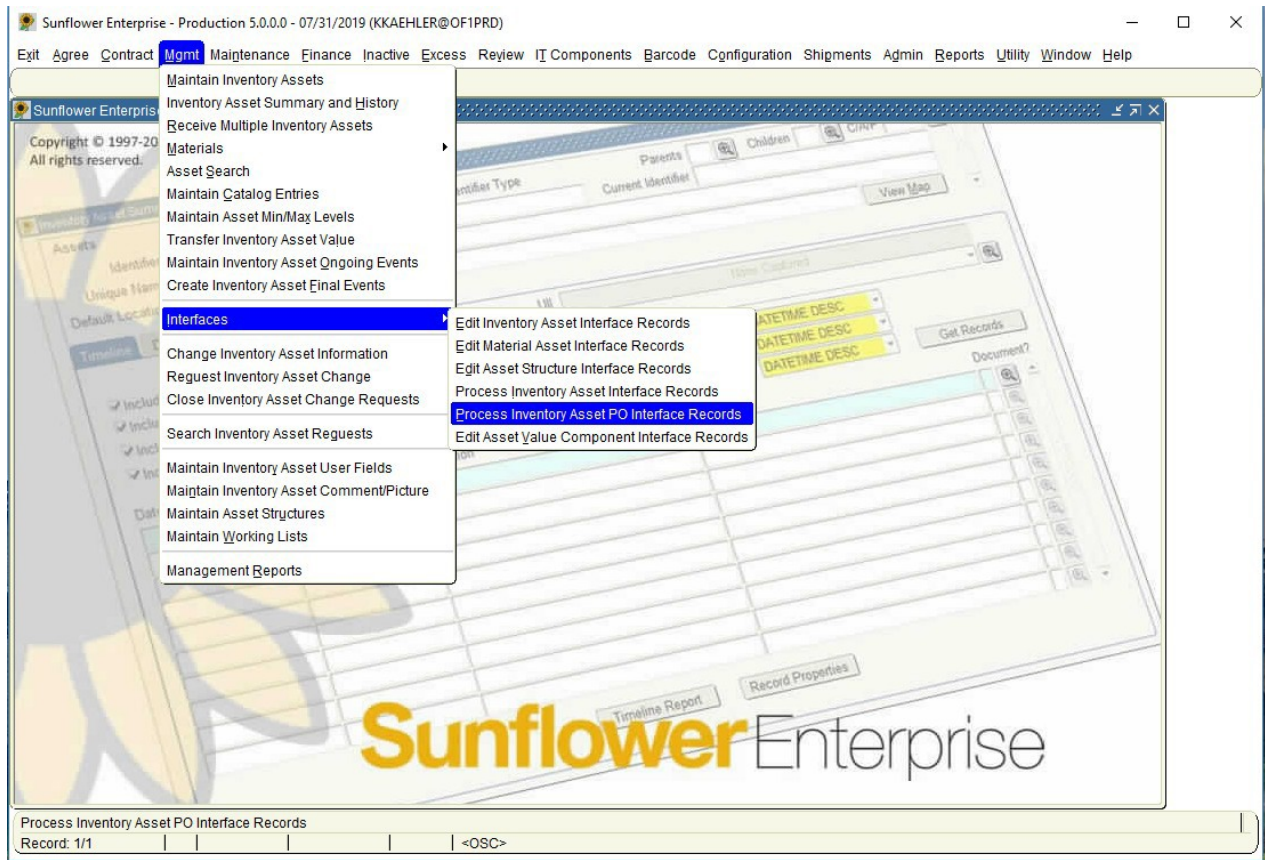


SUNFLOWER USER GUIDE

Creating Records through the PO Interface

For use with Stanford
property only

Sunflower User Guide



From the MGMT pull-down menu:

Select ***Interfaces***

then

Process Inventory Asset PO Interface Records

Sunflower User Guide

Sunflower Enterprise - Production 5.0.0.0 - 07/31/2019 (KKAEHLER@OF1PRD)

Exit Agree Contract Mgmt Maintenance Finance Inactive Excess Review IT Components Barcode Configuration Shipments Admin Reports Functions Utility Window Help

Purchase Orders - aspo0010 (Page 1 of 3)

Purchase Orders

Cmpl? NP PO Identifier

Comments

PO Item Details

NP Item #	Description	Q U A N T I T Y		A L L O C A T E D			Remaining Balance
		Ordered	Received	Assets *	Non-Material *	Material *	
<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"/>							
<input type="checkbox"/>							

<< View >> Show List Change Log

PO Identifier
Record: 1/1 | | | | <OSC>

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.

Sunflower User Guide

The screenshot displays the Sunflower Enterprise software interface. The main window is titled "Purchase Orders - aspo0010 (Page 1 of 3)". The interface includes a menu bar with options like Exit, Agree, Contract, Mgmt, Maintenance, Finance, Inactive, Excess, Review, IT Components, Barcode, Configuration, Shipments, Admin, Reports, Functions, Utility, Window, and Help. Below the menu bar is a toolbar with various icons. The main content area is divided into two sections: "Purchase Orders" and "PO Item Details". The "Purchase Orders" section has fields for "Cmpl? NP", "PO Identifier", and "Comments". The "PO Item Details" section contains a table with columns for "NP Item #", "Description", "QUANTITY" (Ordered, Received), and "ALLOCATED" (Assets, Non-Material, Material). The "Selected POs" dialog box is open, showing a list of POs and an "Add to list" button. The "Allocate" button is also visible in the dialog box.

Purchase Orders - aspo0010 (Page 1 of 3)

Purchase Orders

Cmpl? NP PO Identifier

Comments

PO Item Details

NP Item #	Description	QUANTITY		ALLOCATED		
		Ordered	Received	Assets *	Non-Material *	Material
<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"/>						
<input type="checkbox"/>						

Selected POs

PO Item #

Add to list

PO Item # Unallocated Quantity

Serialized Assets

Serialized Materials

Non-Serialized Materials

Allocate

<< View >> Show List Change Log

PO Identifier

Record: 1/1

<OSC>

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.

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.

Sunflower User Guide

The screenshot shows the Sunflower Enterprise software interface. The title bar indicates the version is 5.0.0.0 and the date is 06/03/2016. The menu bar includes options like Exit, Agree, Contract, Maint, Maintenance, Finance, Inactive, Excess, Review, IT Components, Barcode, Configuration, Shipments, Admin, Reports, Functions, Utility, Window, and Help. The main window is titled "Purchase Orders - aspo0010 (Page 1 of 3)".

In the "Purchase Orders" section, there is a "PO Identifier" field, which is highlighted with a red circle. Below this is a "PO Item Details" section containing a table with columns for NP Item #, Description, and a "QUANTITY" section with sub-columns for Ordered, Received, Assets, and UOM. The table also includes a "Unit Price Value 1" column.

On the right side, there is a "Selected POs" panel with fields for PO and Item #, an "Add to list" button, and a table with columns for PO, Item #, and Unallocated Quantity. An "Allocate" button is at the bottom of this panel.

At the bottom of the main window, there is a status bar showing "PO Identifier" and "Record 1/1".

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.

[illegible]

Notice that in the header box the PO number, the Supplier, and the four-alpha org code appear. This org code is tied to the Award used to make this purchase, it may be different from the Department org code. The PO lines appear below, in the PO Item Details screen.

Sunflower User Guide

Sunflower Enterprise - Production 5.0.0.0 - 07/31/2019 (KKAHLER@OF1PRD)

Exit Agree Contract Mgmt Maintenance Finance Inactive Excess Review IT Components Barcode Configuration Shipments Admin Reports Functions Utility Window Help

Purchase Orders - aspo0010 (Page 1 of 3)

Purchase Orders

Cmpl? NP PO Identifier Po Supplier Organization

☐ ☐ 61205438 INNOVA DYNAMICS MXNG

Comments

PO Item Details

NP Item #	Description	Q U A N T I T Y		A L L O C A T E D		
		Ordered	Received	Assets *	Non-Material *	Material
<input type="checkbox"/> 1	QSUN XE-3 WEATHERING CHAMBER	1	1	1	1	
<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"/>						
<input type="checkbox"/>						

Selected POs

PO Item #

Add to list

Unallocated Quantity

PO Item #

Serialized Assets

Serialized Materials

Non-Serialized Materials

Allocate

<< View >> Show List Change Log

PO Identifier Record: 1/1 <OSC>

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.

The screenshot displays the Sunflower Enterprise application interface. At the top, there's a menu bar with options like Exit, Agree, Contract, Mgmt, Maintenance, Finance, Inactive, Excess, Review, IT Components, Barcode, Configuration, Shipments, Admin, Reports, Functions, Utility, Window, and Help. Below the menu is a toolbar with various icons.

The main window is titled "Purchase Orders - asp00010 (Page 1 of 3)". It contains two primary sections:

- Purchase Orders**: This section includes fields for Cmpl? NP, PO Identifier (61205438), Po Supplier (INNOVA DYNAMICS), Organization (MXNG), and Pmo Update Flag (Y). There is also a Comments field.
- PO Item Details**: This section features a table with columns for NP Item #, Description, Q U A N T I T Y (Ordered, Received), A L L O C A T E D (Assets *, Non-Material *, Material *), and Remaining Balance. The first row shows item 1, "QSUN XE-3 WEATHERING CHAMBER", with an ordered quantity of 1, received quantity of 1, allocated assets of 1, non-material of 1, material of 0, and a remaining balance of \$12,000.00. An orange arrow points from this row to the right-hand panel.

On the right side, there is a panel titled "Selected POs". It has input fields for PO and Item #, an "Add to list" button, and a table with columns for PO, Item #, and Unallocated Quantity. The first row shows PO 61205438, Item # 1, and an unallocated quantity of 0. Below the table are radio buttons for "Serialized Assets", "Serialized Materials", and "Non-Serialized Materials". An orange circle highlights an "Allocate" button at the bottom right of this panel.

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.

Revised 04/13/2020

Sunflower User Guide

This is the Asset Record 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 your selected SUID tag number (excluding leading zeros) in the **SU Barcode #** field.

When completed hit the ‘tab’ key, creating the framework for the Asset Record and tab again to move your cursor to the Identifier Type field.

Sunflower User Guide

Sunflower Enterprise - Production 5.0.0.0 - 06/03/2016 (SCOTTRAY@OF1PRD)

Action Edit Query Block Record Field Lookup Help Window

Process Inventory Asset PO Interface Records - aspo0020 (Page 3 of 3)

Assets

Ok SU Barcode # * New Asset

1 259739

Create 1 Assets

Use next available identifier?

Unprocessed Interface Records

0 Assets

0 Asset Value Components

Asset Additional Details

Identifier Type

Catalog

Manufacturer

Model XE

Official Name

Serial Number

Record Last Updated 06/03/2016

Activity Status IN SERVICE

Asset Condition

Business Unit

Owner

Department

Custodian Identifier

Last Name

User Identifier

Last Name

Location

Do Not Use

Acquisition Date

Today's Date

Flags

Message

Selected POs

View Purchase Order

View PO Item Details

PO	Item #
61205438	1

The model number assigned by the manufacturer

Record: 1/1

Identifier Type

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.

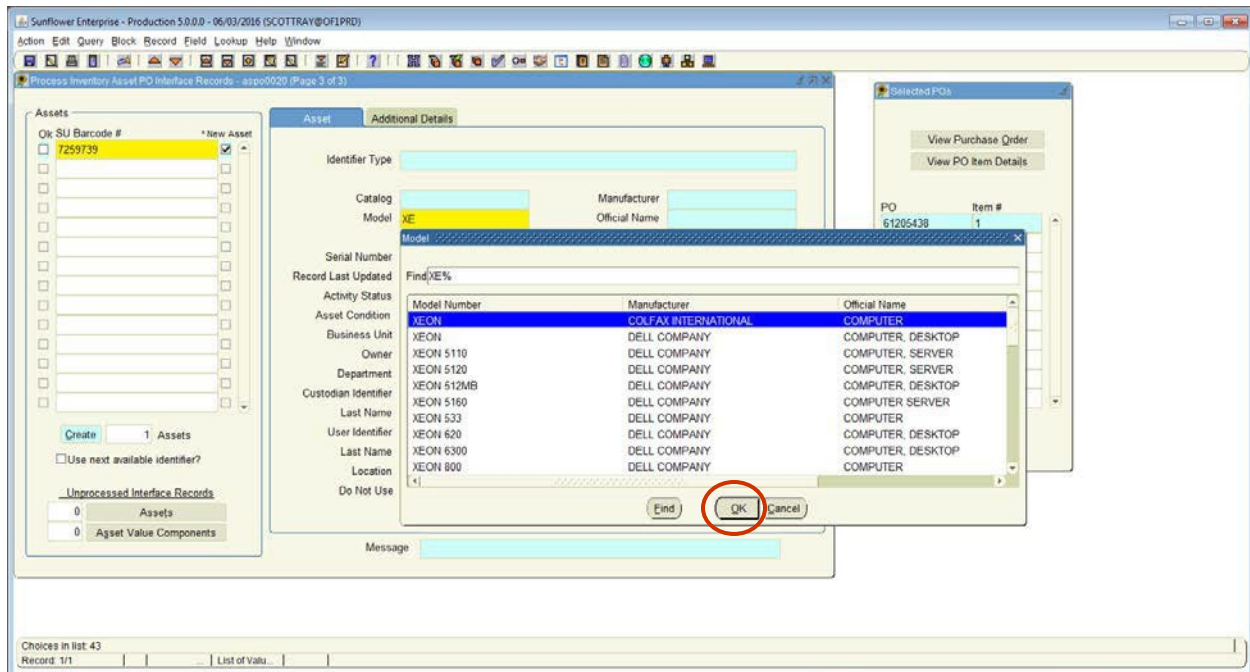
Model/Manufacturer

Once entered place your cursor in to the **Model** field. Enter the first 2 or 3 characters of the model number and then double click or "tab" in 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 manufacturer 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.

Sunflower User Guide



In this example, the first two characters of the model number are “XE”. When that is entered in the field, and we double-click or tab, 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 complete a Catalog Request in SPARC to have the new model number added to the database.

Sunflower User Guide

Sunflower Enterprise - Production 5.0.0.0 - 06/03/2016 (SCOTTRAY@OF1PRD)

Action Edit Query Block Record Field Lookup Help Window

Process Inventory Asset/PO Interface Records - aspe0020 (Page 3 of 3)

Assets

Ok SU Barcode # *New Asset

7259739

Create 1 Assets

Use next available identifier?

Unprocessed Interface Records

0 Assets

0 Asset Value Components

Asset Additional Details

Identifier Type TAGGABLE

Catalog 151145 Manufacturer INNOVA

Model XE-3 Official Name WEATHERING CHAMBER

Serial Number Acquisition Date

Record Last Updated 06/03/2016 Today's Date

Activity Status IN SERVICE Flags

Asset Condition

Business Unit

Owner

Department

Custodian Identifier

Last Name First Mid

User Identifier

Last Name First Mid

Location

Do Not Use

Message

Selected POs

View Purchase Order

View PO Item Details

PO Item #

61205438 1

The identifier assigned to the catalog

Record 1/1

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

Sunflower User Guide

Sunflower Enterprise - Production 5.0.0.0 - 06/03/2016 (SCOTTRAY@OF1PRD)

Action Edit Query Block Record Field Lookup Help Window

Process Inventory Asset PO Interface Records - aspe0020 (Page 3 of 3)

Assets

Ok SU Barcode # *New Asset

7259739

Create 1 Assets

Use next available identifier?

Unprocessed Interface Records

0 Assets

0 Asset Value Components

Asset Additional Details

Identifier Type TAGGABLE

Catalog 151145 Manufacturer INNOVA

Model XE-3 Official Name WEATHERING CHAMBER

Serial Number 15127161X3H

Record Last Updated 06/03/2016 Acquisition Date

Activity Status IN SERVICE Today's Date

Flags

Asset Condition

Business Unit

Owner

Department

Custodian Identifier

Last Name First Mid

User Identifier

Last Name First Mid

Location

Do Not Use

Message

Selected POs

View Purchase Order

View PO Item Details

PO	Item #
61205438	1

The serial number assigned by the manufacturer

Record 1/1

Serial Number

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

If there is no serial number, please leave the field blank and make a note in the comments section of the record. 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.

Sunflower User Guide

Sunflower Enterprise - Production 5.0.0.0 - 06/03/2016 (SCOTTRAY@OF1PRD)

Action Edit Query Block Record Field Lookup Help Window

Process Inventory Asset PO Interface Records - aspe0020 (Page 3 of 3)

Assets

Ok SU Barcode # *New Asset

7259739

Create 1 Assets

Use next available identifier?

Unprocessed Interface Records

0 Assets

0 Asset Value Components

Asset Additional Details

Identifier Type TAGGABLE

Catalog 151145 Manufacturer INNOVA

Model XE-3 Official Name WEATHERING CHAMBER

Serial Number 15127161X3H Acquisition Date 04/15/2016

Record Last Updated 06/03/2016 Today's Date

Activity Status IN SERVICE Flags

Asset Condition

Business Unit

Owner

Department

Custodian Identifier

Last Name First Mid

User Identifier

Last Name First Mid

Location

Do Not Use

Message

Selected POs: 1

The activity status' long name, e.g. IN-SERVICE

Record 1/1 List of Value

Use the tab key to move through the next field, and allow “today's 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). This is often the date received in Oracle iProcurement and payment made but there are exceptions, such as releasing funds for a down payment.

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

Sunflower User Guide

The screenshot shows the Sunflower Enterprise software interface. The main window is titled 'Process Inventory Asset PO Interface Records - aspo0020 (Page 3 of 3)'. It has a menu bar with 'Action', 'Edit', 'Query', 'Block', 'Record', 'Field', 'Lookup', 'Help', and 'Window'. Below the menu bar is a toolbar with various icons. The main area is divided into two panes. The left pane is titled 'Assets' and contains a list of 'Asset Flags' with checkboxes for 'Capital', 'Sensitive', 'ElectronicWaste', 'Hazardous', 'Bulk', and 'Donated'. The right pane is titled 'Asset' and contains a form for 'Additional Details'. The form includes fields for 'Identifier Type' (TAGGABLE), 'Catalog' (151145), 'Model' (XE-3), 'Manufacturer' (INNOVA), 'Official Name' (WEATHERING CHAMBER), 'Serial Number' (15127161X3H), 'Acquisition Date' (04/16/2016), 'Last Updated' (06/03/2016), 'Today's Date', 'Activity Status' (IN SERVICE), 'Flags', 'Asset Condition', 'Business Unit', 'Owner', 'Department', 'Location Identifier', 'Last Name', 'First', 'Mid', 'User Identifier', 'Last Name', 'First', 'Mid', 'Location', and 'Do Not Use'. At the bottom of the right pane is a 'Message' field. Below the main panes is a status bar with 'Record 1/1' and a 'List of Valu...' button.

Asset Flags

The next field is the “Flags” field, which identifies several attributes of the asset. 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.

Sunflower User Guide

The screenshot displays the Sunflower Enterprise software interface. The title bar indicates the version is Production 5.0.0.0, dated 06/03/2016, with the user SCOTTRAY@OF1PRD. The menu bar includes Action, Edit, Query, Block, Record, Field, Lookup, and Help. The toolbar contains various icons, with a blue save icon circled in red. The main window is titled 'Asset Flags - asmm0010' and features two tabs: 'Asset' and 'Additional Details'. The 'Asset' tab is active, showing a form with various fields. On the left, the 'Asset Flags' section contains a list of flags with dropdown menus: Capital (Y), Sensitive (N), Electronic Waste (N), Hazardous (N), Bulk (N), and Donated (N). A red arrow points to the 'Donated' dropdown. The right side of the form contains fields for Identifier Type (TAGGABLE), Catalog (151145), Manufacturer (INNOVA), Model (XE-3), Official Name (WEATHERING CHAMBER), Serial Number (15127161X3H), Acquisition Date (04/16/2016), Last Updated (06/03/2016), Activity Status (IN SERVICE), and Today's Date. Below these are fields for Asset Condition, Business Unit, Owner, Department, and Identification fields (Last Name, First, Mid). At the bottom, there is a 'Do Not Use' checkbox and a 'Message' field. A status bar at the bottom left shows 'Selected POS: The asset is donated' and 'Record 1/1'.

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.

Sunflower User Guide

Sunflower Enterprise - Production 5.0.0.0 - 06/03/2016 (SCOTTRAY@OF1PRD)

Action Edit Query Block Record Field Lookup Help Window

Process Inventory Asset PO Interface Records - uspe0020 (Page 3 of 3)

Assets

Ok SU Barcode # *New Asset

7259739

Create 1 Assets

Use next available identifier?

Unprocessed Interface Records

0 Assets

0 Asset Value Components

Asset Additional Details

Identifier Type TAGGABLE

Catalog 151145 Manufacturer INNOVA

Model XE-3 Official Name WEATHERING CHAMBER

Serial Number 15127161X3H Acquisition Date 04/15/2016

Record Last Updated 06/03/2016 Today's Date

Activity Status IN SERVICE Flags C

Asset Condition 1 (GOOD CONDITION)

Business Unit MAAA - VICE PROVOST AND DEAN OF RESEARCH

Owner STANFORD UNIVERSITY

Department MWHQ - GLAM OPERATIONS

Custodian Identifier

Last Name First Mid

User Identifier

Last Name First Mid

Location

Do Not Use

Message

Selected POs: 0

An identifier assigned by the institution, e.g. badge no: Record 1/1

Condition

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

Business Unit, Owner and Department

The information entered is 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 once the record is completed and saved.

Sunflower User Guide

Sunflower Enterprise - Production 5.0.0.0 - 06/03/2016 (SCOTTRAY@OF1PRD)

Action Edit Query Block Record Field Lookup Help Window

Process Inventory Asset PO Interface Records - uspe0020 (Page 3 of 3)

Assets

Ok SU Barcode # *New Asset

7259739

Create 1 Assets

Use next available identifier?

Unprocessed Interface Records

0 Assets

0 Asset Value Components

Asset Additional Details

Identifier Type TAGGABLE

Catalog 151145 Manufacturer INNOVA

Model XE-3 Official Name WEATHERING CHAMBER

Serial Number 15127161X3H Acquisition Date 04/15/2016

Record Last Updated 06/03/2016 Today's Date

Activity Status IN SERVICE Flags C

Asset Condition 1 GOOD CONDITION

Business Unit MAAA - VICE PROVOST AND DEAN OF RESEARCH

Owner STANFORD UNIVERSITY

Department MWHQ - GLAM OPERATIONS

Custodian Identifier

Last Name First Mid

User Identifier

Last Name First Mid

Location

Do Not Use

Message

Selected POs

An identifier assigned by the institution, e.g. badge no

Record 1/1

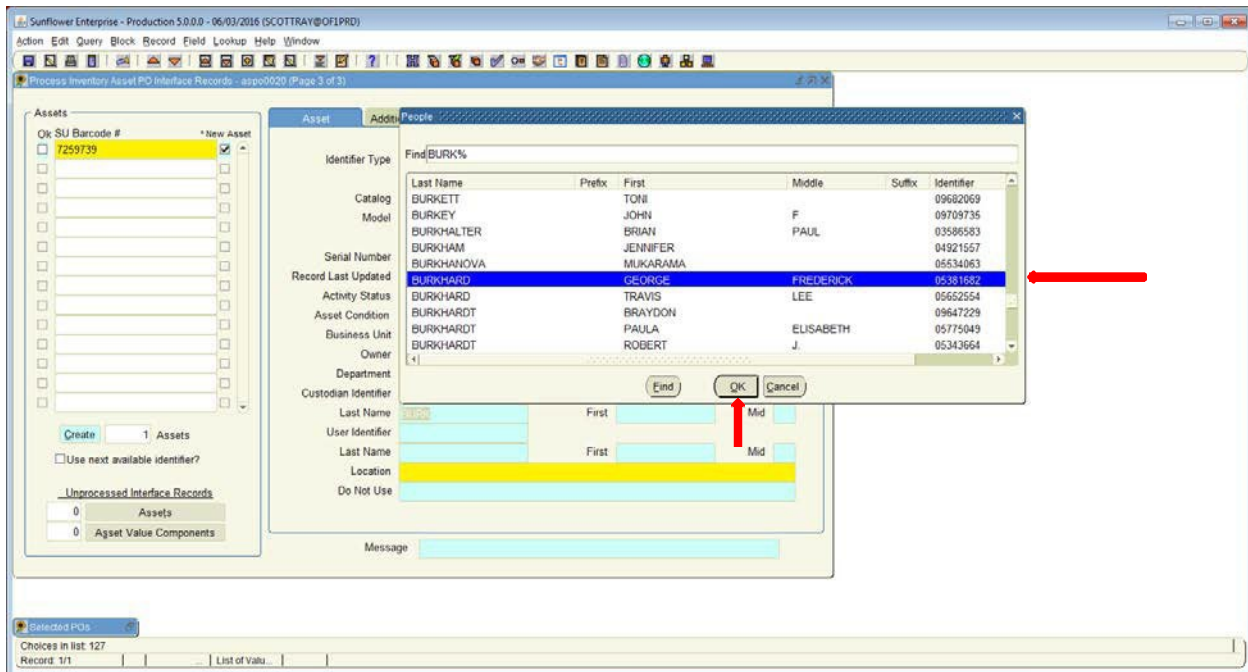
Custodian

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/Department 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. If there are multiple people with the same first and last name you may need to ask the custodian for their employee ID number in order to verify the correct person was selected.

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.

Sunflower User Guide



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.

****For instances where there are multiple people with the same first and last name, you may need to ask for their employee ID # to verify you selected the correct individual.**

Sunflower User Guide

Sunflower Enterprise - Production 5.0.0.0 - 06/03/2016 (SCOTTRAY@OF1PRD)

Action Edit Query Block Record Field Lookup Help Window

Process Inventory Asset PO Interface Records - aspe0020 (Page 3 of 3)

Assets

Ok SU Barcode # *New Asset

7259739

Create 1 Assets

Use next available identifier?

Unprocessed Interface Records

0 Assets

0 Asset Value Components

Additional Details

Identifier Type TAGGABLE

Catalog 151145 Manufacturer INNOVA

Model XE-3 Official Name WEATHERING CHAMBER

Serial Number 15127161X3H Acquisition Date 04/15/2016

Record Last Updated 06/03/2016 Today's Date

Activity Status IN SERVICE Flags C

Asset Condition 1 GOOD CONDITION

Business Unit MAAA - VICE PROVOST AND DEAN OF RESEARCH

Owner STANFORD UNIVERSITY

Department MVHQ - GLAM OPERATIONS

Custodian Identifier 05381682

Last Name BURKHARD First GEORGE Mid FRE

User Identifier 05381682

Last Name BURKHARD First GEORGE Mid FRE

Location

Do Not Use

Message

Detected POS

The person's last name, e.g. SMITH

Record 1/1 List of Valu...

User

This field 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.

Sunflower User Guide

Location

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 form will appear.

The multi-part location screen consists of 8 fields, but only 3 are in use at Stanford.

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**.

Building-Floor, is the blank field underneath Quad. You can enter the number combination 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.

****** If you already have the **QUAD-BLDG- FL-RM** combination you do not need to double click to open the list. You just can select TAB to move quickly through each field.

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.

Sunflower User Guide

The screenshot displays the 'Maintain Locations' window in the Sunflower software. The window has a menu bar (Action, Edit, Query, Block, Record, Field, Lookup, Help, Window) and a toolbar. A blue save icon in the toolbar is circled in red. The form contains the following fields:

- Locations:** Save, Cancel, Location Identifier
- Quad:** 90 - AREAS NOT IN 1-14
- BLDG-FLOOR:** 974R-02
- ROOM:** 204
- Leave Blank:**
- GPS 1:**
- GPS 2:**
- GPS 3:**
- Manufacturer:** HEIDELBERG
- Official Name:** SPECTRALIS TRACKING OCT SYSTEM
- Serial Number:** SPEC-KT-06964
- Acquisition Method:** PURCHASE
- Acquisition Cost:** \$175,457.52
- Asset Condition:** 1 GOOD CONDITION
- Activity Status:** IN SERVICE
- Business Unit:** VAAA - SCHOOL OF MEDICINE
- Department:** XDCI - OPHTHALMOLOGY
- Custodian:** 50002043
- User:** 50002043
- Last Name*:** DUBRA
- Model:** HRA+OCT
- Model Name:**
- Stock Number:**
- User Fields*:**
- Acquisition Date:** 08/20/2017
- Record Last Updated:** 01/27/2020
- Today's Date:** 12/01/2017
- Due Date (PMO Use Only):**
- Flags*:** CSE
- Do Not Use:**
- Owner:** STANFORD UNIVERSITY
- DPA:** BENNETT BRIANNA 09621517
- Accepted?:** Y
- First:** ALFREDO
- Mid:**
- Location*:** 90 - AREAS NOT IN 1-14 BLDG-FLOOR 974R-02 ROOM 204
- Document*:**
- Container Number:**
- Do Not Use*:**
- Drawing No.:**
- Global User Fields*:** 1242771_Insided room 204 with dongles inside drawer next to OCT_90653.09_2017_ALLOW

Buttons at the bottom: Add to Working List, Add'l Information, Commodity, Comment / Picture / Attachment, Re-Request, Asset Configuration, Asset Kit.

Footer: The site's long name, e.g. LIVERMORE
Record: 1/1 | ... | List of Valu...

Once all of the location fields are completed, click SAVE or by clicking on the blue save icon in the upper left corner.

Sunflower User Guide

Sunflower Enterprise - Production 5.0.0.0 - 06/03/2016 (SCOTTTRAY@OFI.PRD)

Action Edit Query Block Record Field Lookup Help Window

Process Inventory Asset PO Interface Records - aspo0020 (Page 3 of 3)

Assets

Ok SU Barcode # *New Asset

7259739

Create 1 Assets

Use next available identifier?

Unprocessed Interface Records

0 Assets

0 Asset Value Components

Asset Additional Details

Identifier Type TAGGABLE

Catalog 151145 Manufacturer INNOVA

Model XE-3 Official Name WEATHERING CHAMBER

Serial Number 15127161X3H Acquisition Date 04/15/2016

Record Last Updated 06/03/2016 Today's Date

Activity Status IN SERVICE Flags C

Asset Condition 1 GOOD CONDITION

Business Unit MAAA - VICE PROVOST AND DEAN OF RESEARCH

Owner STANFORD UNIVERSITY

Department MWHQ - GLAM OPERATIONS

Custodian Identifier 05381682

Last Name BURKHARD First GEORGE Mid FRE

User Identifier 05381682

Last Name BURKHARD First GEORGE Mid FRE

Location 04 - NEAR WEST_BLDG-FLOOR_480-02_ROOM_277

Do Not Use

Message

Selected POs

The location of the asset. Press Edit to display or edit location

Record 1/1

Notice the information entered in the location screen populates as a string of data in the main record.

You are ALMOST done.

The screenshot displays the Sunflower Enterprise application interface. At the top, the title bar reads "Sunflower Enterprise - Production 5.0.0.0 - 06/03/2016 (SCOTTRAY@OFLPRD)". Below the title bar is a menu bar with options: Action, Edit, Query, Block, Record, Field, Lookup, Help, Window. A toolbar with various icons is positioned below the menu bar. The main window title is "Process Inventory Asset PO Interface Records - aspo0020 (Page 3 of 3)".

The application is divided into two main sections. On the left is the "Assets" section, which contains a table with columns "Orig SU Barcode #" and "*New Asset". The first row shows a barcode of "7259739" with a checkmark in the "New Asset" column. Below the table are buttons for "Create" (with a value of "1 Assets"), "Use next available identifier?", "Unprocessed Interface Records" (with a value of "0 Assets"), and "Asset Value Components" (with a value of "0").

The right section is titled "Asset" and has a sub-tab labeled "Additional Details" (circled in red). This section contains a form with various fields for asset information:

- Identifier Type: TAGGABLE
- Catalog: 151145
- Manufacturer: INNOVA
- Model: XE-3
- Official Name: WEATHERING CHAMBER
- Serial Number: 15127161X3H
- Acquisition Date: 04/16/2016
- Record Last Updated: 06/03/2016
- Today's Date: (empty)
- Activity Status: IN SERVICE
- Flags: C
- Asset Condition: 1 GOOD CONDITION
- Business Unit: MAAA - VICE PROVOST AND DEAN OF RESEARCH
- Owner: STANFORD UNIVERSITY
- Department: MWHQ - GLAM OPERATIONS
- Custodian Identifier: 05381682
- Last Name: BURKHARD
- First: GEORGE
- Mid: FRE
- User Identifier: 05381682
- Last Name: BURKHARD
- First: GEORGE
- Mid: FRE
- Location: 04 - NEAR WEST_BLDG-FLOOR_480-02_ROOM_27A
- Do Not Use: (empty)

At the bottom of the "Additional Details" section is a "Message" field.

Below the main window, there is a "Selected POs" section with a table showing the location of the asset. The first row indicates "Record: 1/1".

Revised 04/13/2020

Sunflower User Guide

Global User Fields

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.

Sunflower User Guide

Sunflower Enterprise - Production 5.0.0.0 - 06/03/2016 (SCOTTRAY@OF1PRD)

Custom Attributes of Asset States - save2010

FA Asset ID

Other Description

Location Detail

Department Tag Number

Asset User

Net Book Value

Year Manufactured 2016

Date Retired

Cost Retired

Retirement Status

Alternate Location *

IDC Flag (PMO Use Only) ALLOW

Last Calibration/Maintenance

Next Calibration/Maintenance

PMO Audit

Fleet Garage ID#

Fab 1st Notice

Fab 2nd Notice

Fab Completion Form

Selected POS: NUMBER(4,0) The year the asset was manufactured

Record 1/1

On this page, you can enter additional description details and more location detail.

The field to always populate is the **Year Manufactured**, complete with the appropriate year and once finished click the blue save icon in the upper left corner of the icon ribbon.

Additional Fields to Consider:

- **Location Detail field-** If the asset is located in a box on a shelf on the right lab bench you could enter that information in free form text.
- **Other Description field-** if the asset was comprised of several parts or contains additional distinguishing features
- **Fleet Garage ID#-** If your asset is a vehicle, populate the four digit Fleet Garage Number for easier identification.

Sunflower User Guide

Sunflower Enterprise - Production 5.0.0.0 - 06/03/2016 (SCOTTRAY@OF1PRD)

Action Edit Query Block Record Field Lookup Help Window

Process Inventory Asset PO Interface Records - aspe0020 (Page 3 of 3)

Assets

Ok SU Barcode # *New Asset

7259739

Create 1 Assets

Use next available identifier?

Unprocessed Interface Records

0 Assets

0 Asset Value Components

Asset

Additional Details

Initial Event

Acquisition Method PURCHASE

User Fields

Asset Value Components

PO Identifier 61205438

Item # 1 (1 of 1)

Value Type ACQUISITION COST

Acquisition Cost \$12,000.00

User Fields 61205438_1_INNOVA DYNAMICS

Global User Fields 2016_ALLOW

Do Not Use

Message

Selected POs

The asset event type's long name, e.g. PURCHASE, TRANSFER

Record 1/1

Once saved, you will return to the additional details tab.

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

NOTE: The record is not yet saved.

Sunflower User Guide

The screenshot displays the Sunflower Enterprise software interface. The title bar indicates the version is Production 5.0.0.0, dated 06/03/2016, with the user SCOTTRAY@OF1PRD. The menu bar includes Action, Edit, Query, Block, Record, Field, Lookup, and Help. The toolbar contains various icons, with the 'Save' icon (a floppy disk) highlighted by a red circle. The main window is titled 'Unprocessed Inventory Asset PO Interface Records - uspo0020 (Page 3 of 3)'. It features two tabs: 'Assets' and 'Additional Details'. The 'Assets' tab shows a list of assets with columns for 'Ok', 'SU Barcode #', and '*New Asset'. The first asset has a barcode of 7259725. Below the list are buttons for 'Create' and '1 Assets', and a checkbox for 'Use next available identifier?'. The 'Additional Details' tab shows the following information for the selected asset:

Identifier Type	TAGGABLE		
Catalog	151145	Manufacturer	INNOVA
Model	XE-3	Official Name	WEATHERING CHAMBER
Serial Number	15127161X3H	Acquisition Date	04/15/2016
Record Last Updated	06/03/2016	Today's Date	
Activity Status	IN SERVICE	Flags	C
Asset Condition	1	GOOD CONDITION	
Business Unit	MAAA - VICE PROVOST AND DEAN OF RESEARCH		
Owner	STANFORD UNIVERSITY		
Department	MWHQ - GLAM OPERATIONS		
Custodian Identifier	05381682	First	GEORGE
Last Name	BURKHARD	Mid	FRE
User Identifier	05381682	First	GEORGE
Last Name	BURKHARD	Mid	FRE
Location	04 - NEAR WEST_BLDG-FLOOR_480-02_ROOM_277		
Do Not Use			

At the bottom of the 'Additional Details' tab is a 'Message' field. The status bar at the bottom of the window shows 'Selected POS: 0' and 'The tracking identifier assigned to the interest asset Record: 1/1'.

Review the information one final time and when ready, select the **SAVE** icon to save the record.

Sunflower User Guide

Process Inventory Asset PO Interface Records - aspo0020 (Page 2 of 3)

Assets

Ok SU Barcode # 7246029 * New Asset

Asset Identifier Type TAGGABLE

Catalog 167454 Manufacturer PHC CORPORATION

Model MDF-DU702VH-PA Official Name FREEZER

Acquisition Date 01/10/2020

Today's Date

Flags C H

First JANINE Mid

First Mid

OG-FLOOR_472R-02_ROOM_M202

Message

Interface Processing Results Summary

SU Barcode # 7246029

AS-01390: Transaction complete. Successfully created/updated 1 of 1 asset(s)

OK

Create

Use next

Unprocess

0 Assets

0 Asset Value Components

Selected POs

You will receive the confirmation above if the record saves correctly.

Purchase Orders

Cmpl? NP PO Identifier 10039900 Po Supplier COHERENT LASER GROUP Organization QEDS Pmo Update Flag N

Comments

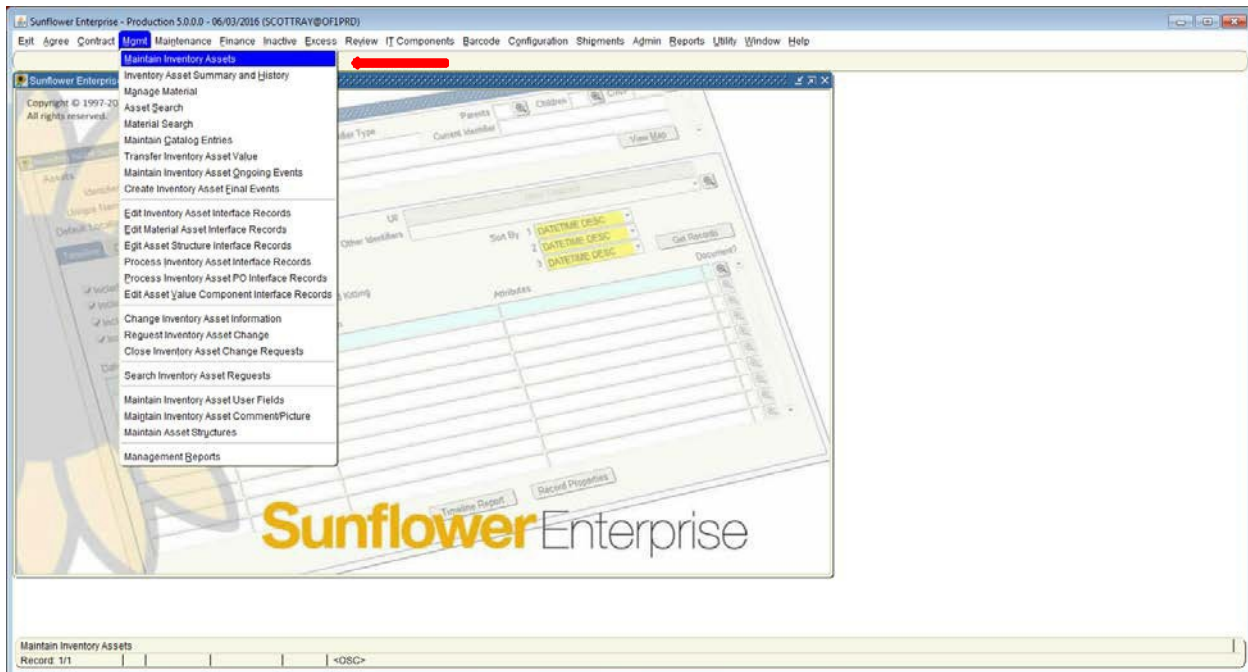
PO Item Details

NP Item #	Description	QUANTITY			ALLOCATED			Remaining Balance
		Ordered	Received	Assets	Non-Material	Material		
1	1043698SABRE TSM 15 VIS TUBE	1	1	1	1	0	\$0.00	
2	0167-535-00EXTENSION ASSY, AUTO APERT	1	1	1	1	0	\$0.00	
Assets allocated for PO Identifier 10039900 Item # 1								
Material?	SU Barcode #	Stock Number	Allocated	Processed?	1	0	\$259.80	
INV 7271748			1	1	1	0	\$1,470.00	
Total Assets 1 Total Allocated 1								

Show List Change Log

You will notice that there is a **1** in the Asset field, next to Number Ordered and Received (1). This means one record has been created from this PO. If you double click on the 1 in the Asset field you will get a pop up that shows you the SUID tag number that was entered and if the record processed completely (check mark under Processed).

Sunflower User Guide



If you would like to visit the newly created record. Close the open windows within Sunflower and select the **MGMT** tab and select **Maintain Inventory Assets**.

A blank record will open.

Sunflower User Guide

Exit Agree Contract Mgmt Maintenance Finance Inactive Excess Review IT Components Barcode Configuration Shipments Admin Reports Functions Utility Window

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets

UII: None Captured

Other Identifiers (1): INV / 7246012

SU Barcode #: 7246012 U/T: T Existing interest asset: Type: SU Barcode #: Released?: Y

Default Location*:

Catalog Identifier*: 170394 ☐ Commodity Asset Parents: 0 Children: 0 C/A/P:

Manufacturer: PHC CORPORATION ☐ Material Model: MDF-DU702VHA-PA

Official Name: FREEZER, UPRIGHT Model Name:

Serial Number: 190300665 Stock Number:

Acquisition Method: PURCHASE User Fields*:

Acquisition Cost*: \$11,095.56 Acquisition Date: 01/10/2020 Today's Date:

Asset Condition: 1 GOOD CONDITION Record Last Updated: 02/20/2020 Due Date (PMO Use Only):

Activity Status: IN SERVICE Flags*: C H Do Not Use:

Business Unit: VAAA - SCHOOL OF MEDICINE Owner: STANFORD UNIVERSITY

Department: VBNK - BIOBANKING Accepted?: Y DPA: BARANY MICHAEL R 09749268

Custodian: 05919321 Last Name*: SUNG First: JANINE Mid:

User: Last Name*: First: Mid:

Location*: 90 - AREAS NOT IN 1-14 _BLDG-FLOOR _472R-02 _ROOM _M202

Document*: Container Number:

Do Not Use*: Drawing No.:

Global User Fields*: 2019 _ALLOW

Add to Working List Add Information Commodity Comment / Picture / Attachment Re-Request Asset Configuration Asset Kit

Enter the new tag number and hit tab.

The record will populate with the newly created asset information, as well as the Primary DPA name.