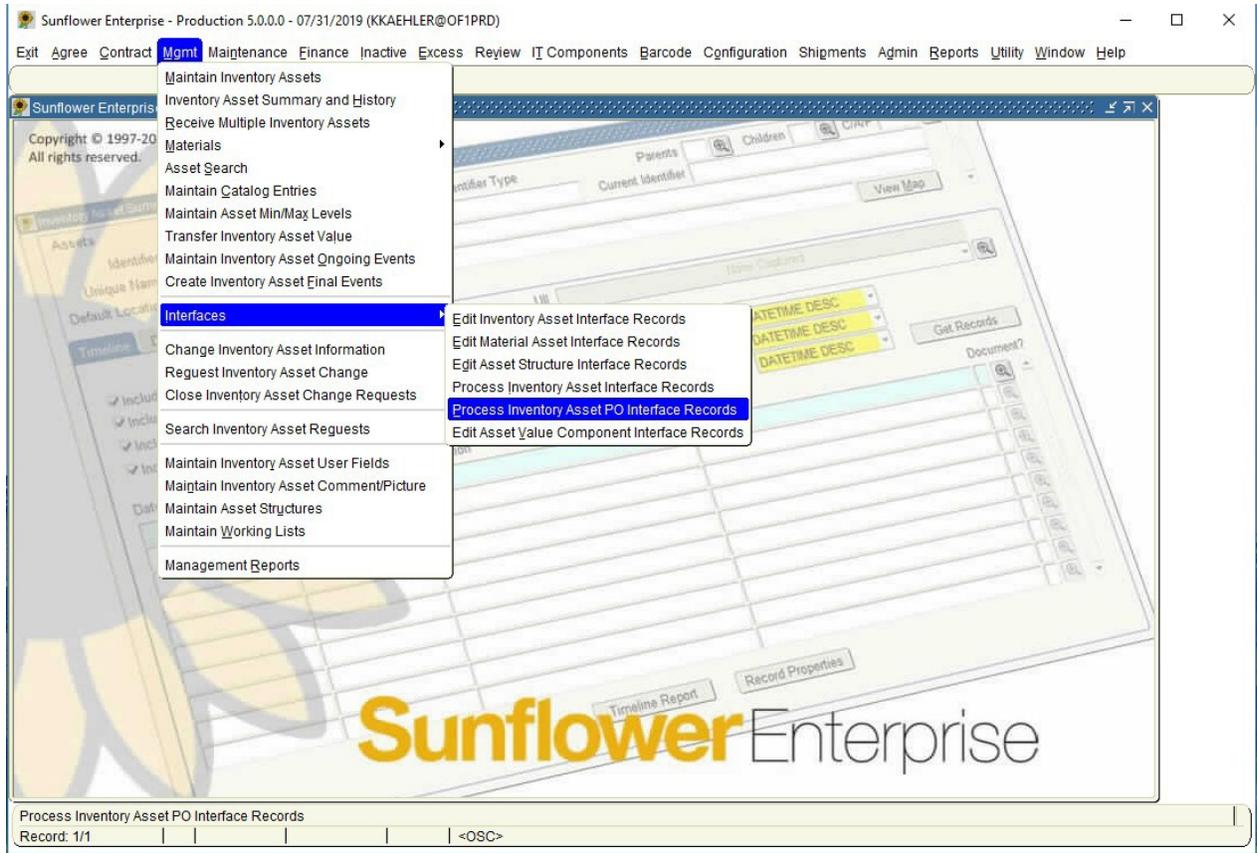


SUNFLOWER USER GUIDE

Creating Records through the PO Interface

For use with Stanford
property only

Sunflower User Guide



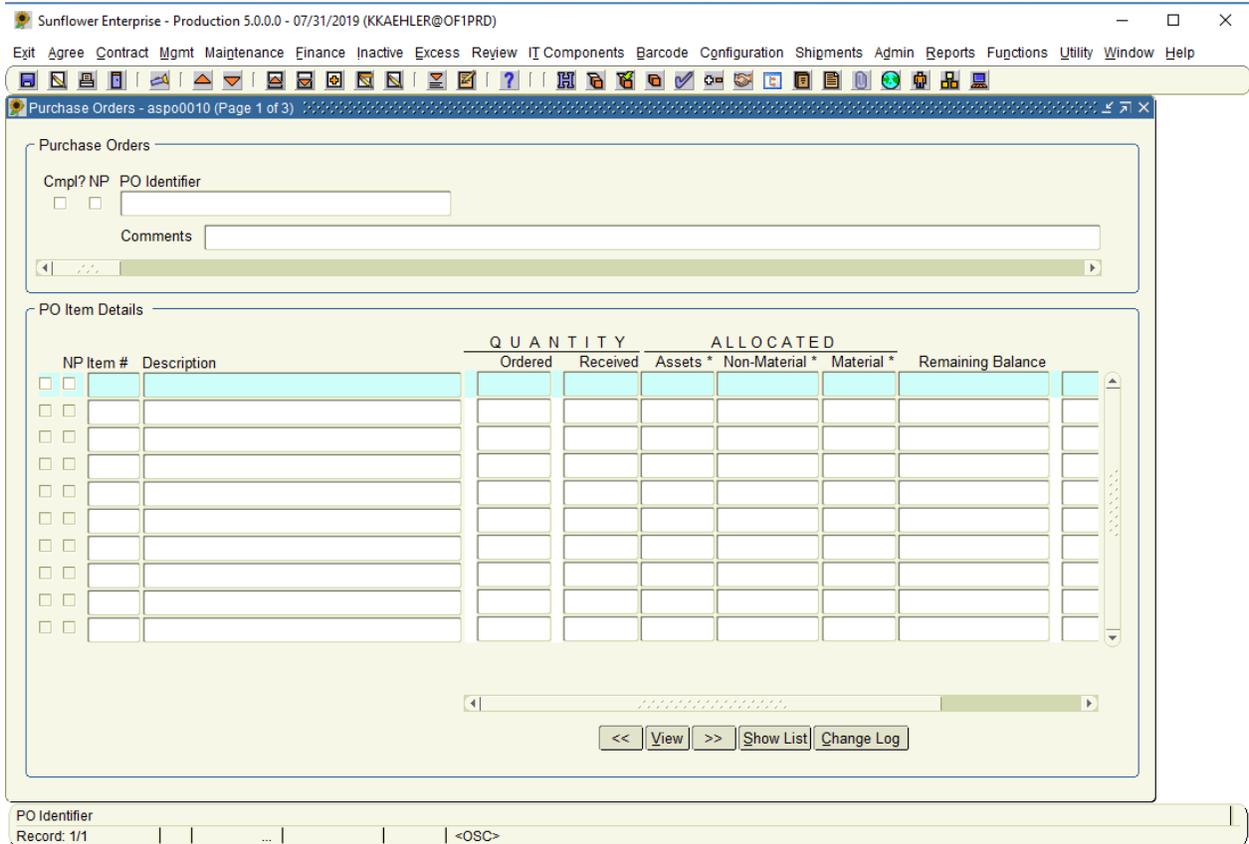
From the MGMT pull-down menu:

Select **Interfaces**

then

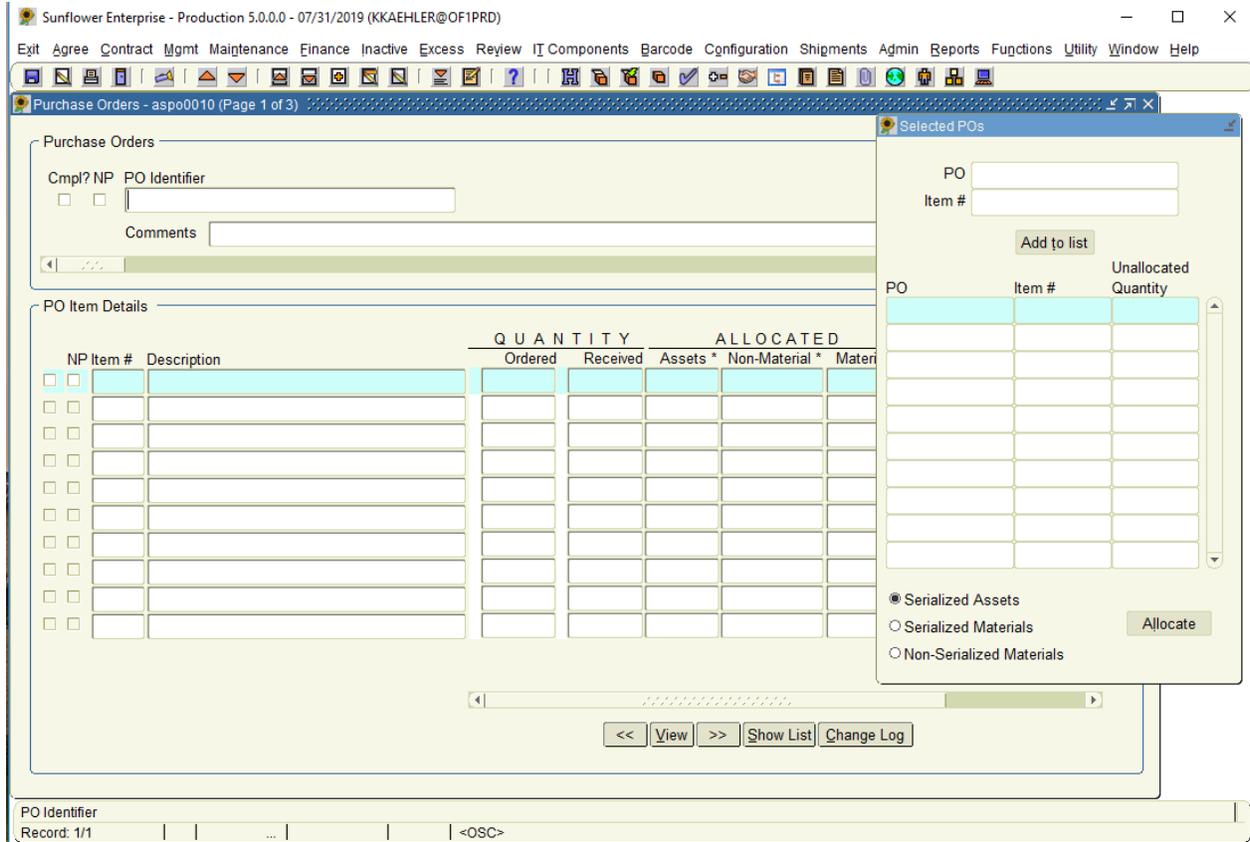
Process Inventory Asset PO Interface Records

Sunflower User Guide



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.

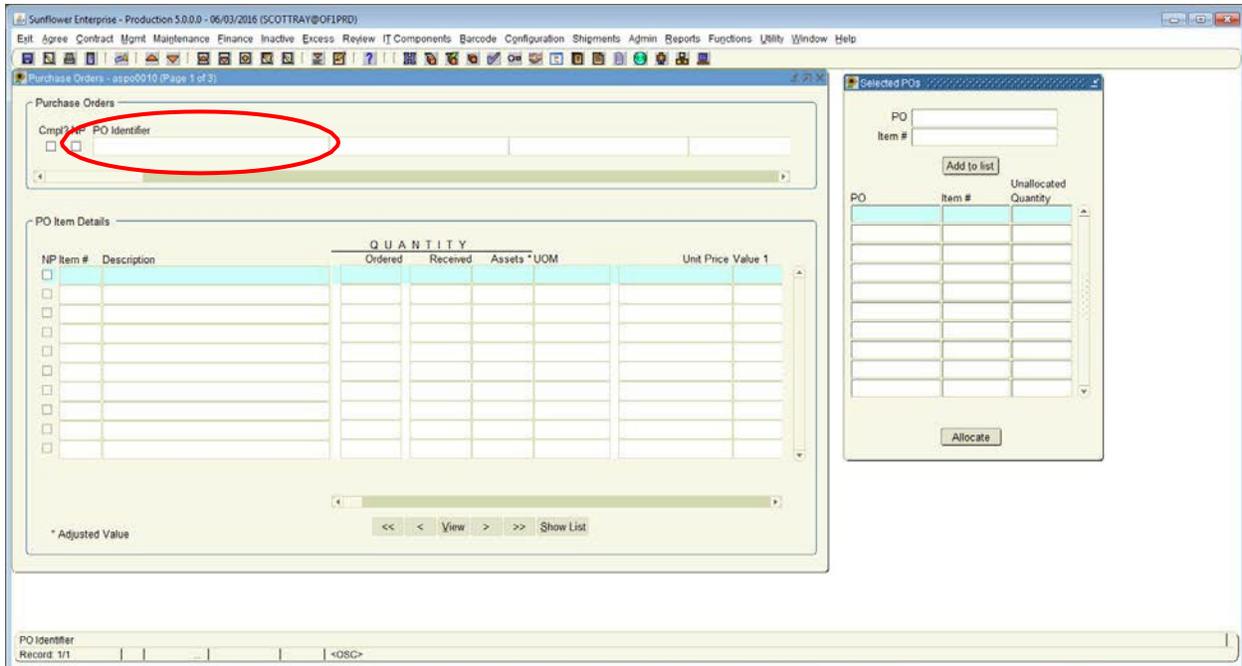
Sunflower User Guide



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

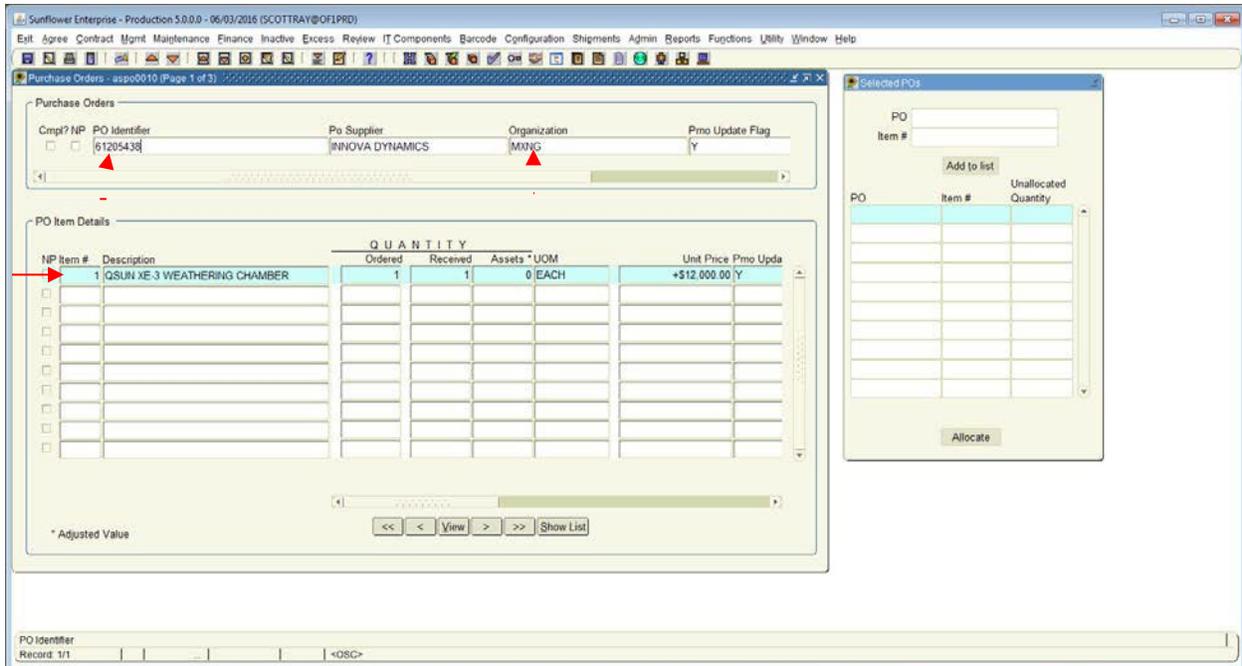


The next step is to enter the PO number in the PO field. Then hit the 'enter' or 'tab' key on your keyboard.

- 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.

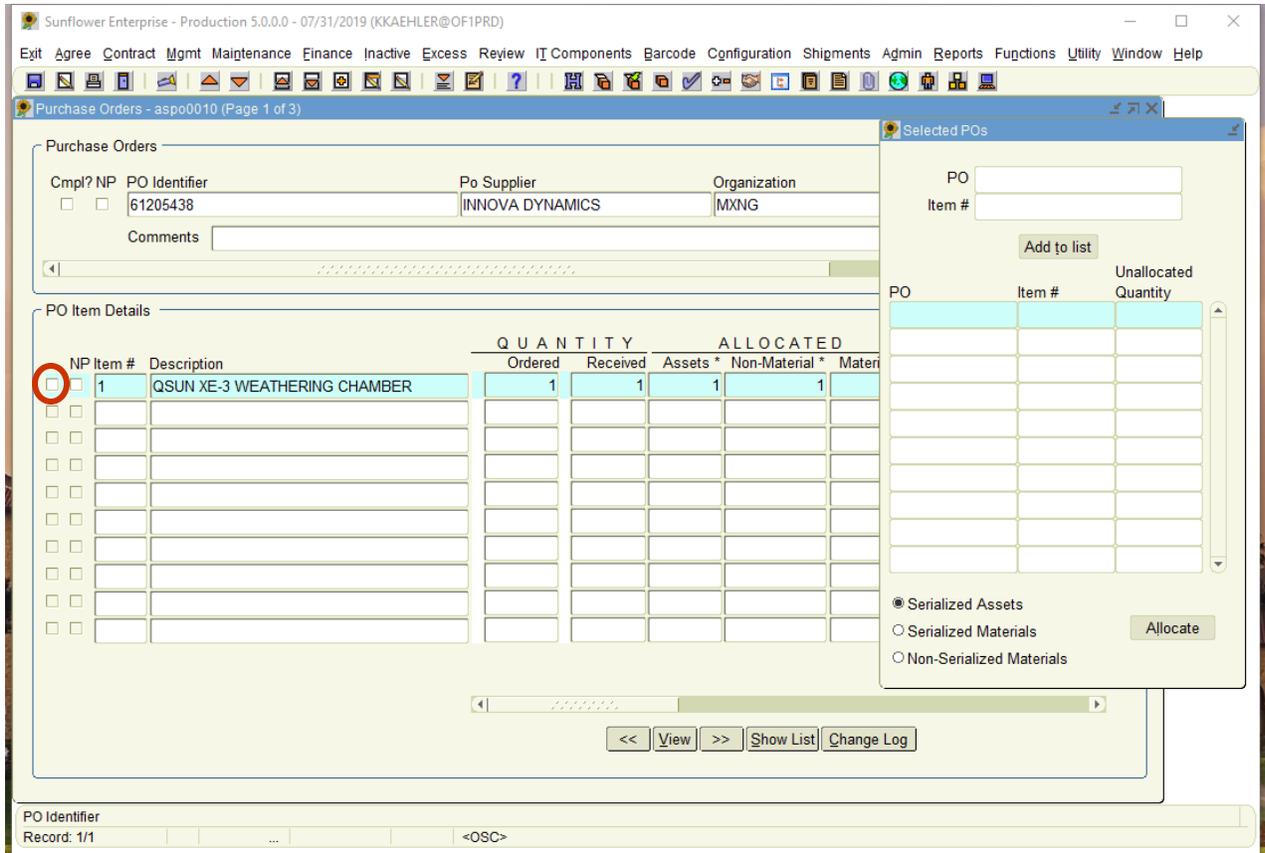
Sunflower User Guide



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. 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.

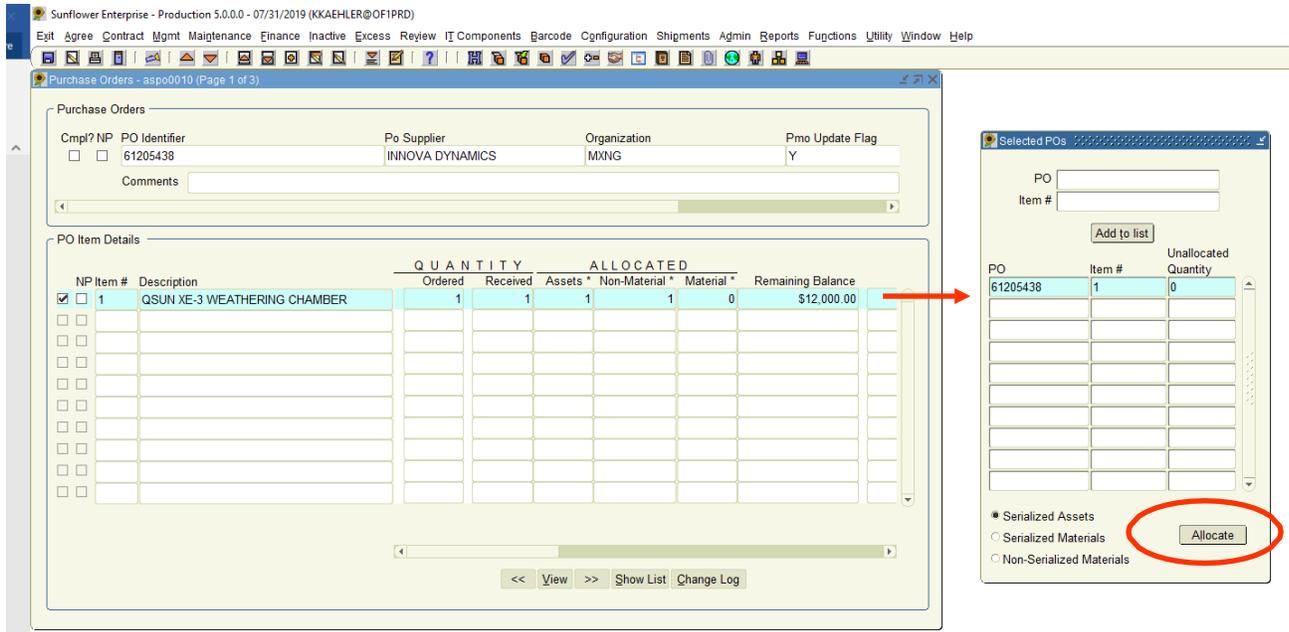
Sunflower User Guide



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.

Sunflower User Guide



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.

Sunflower User Guide

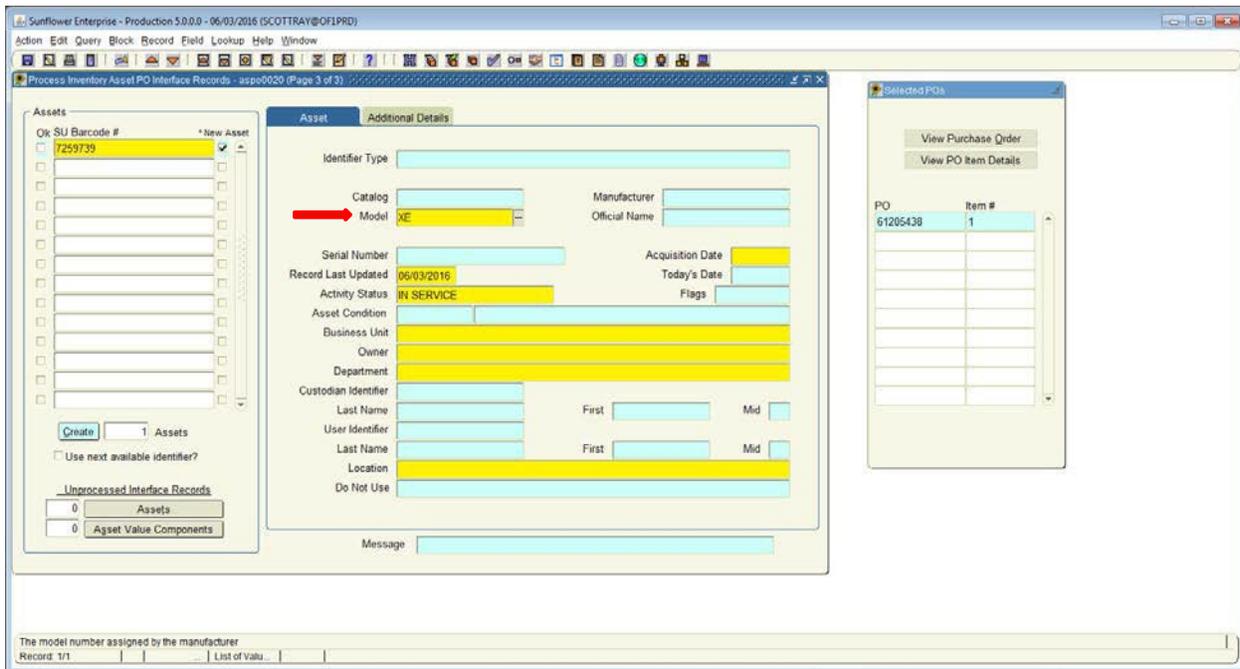
The screenshot shows the Sunflower Enterprise software interface for creating an asset record. The main window is titled "Process Inventory Asset PO Interface Records - aspo0020 (Page 3 of 3)". On the left, there is a table with columns "Ok SU Barcode #" and "*New Asset". Below this table are buttons for "Create" (1 Assets) and "Use next available identifier?". At the bottom left, there are "Unprocessed Interface Records" for "Assets" (0) and "Asset Value Components" (0). The main form area is split into "Asset" and "Additional Details" tabs. The "Asset" tab contains fields for Identifier Type, Catalog, Model, Manufacturer, Official Name, Serial Number, Record Last Updated (06/03/2016), Activity Status, Asset Condition, Business Unit, Owner, Department, Custodian Identifier, Last Name, User Identifier, Last Name, Location, and Do Not Use. The "Additional Details" tab contains Acquisition Date, Today's Date, and Flags. On the right, there is a "Selected POs" window with buttons for "View Purchase Order" and "View PO Item Details", and a table with columns "PO" and "Item #". The status bar at the bottom shows "The tracing identifier assigned to the interest asset" and "Record 1/1".

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



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.

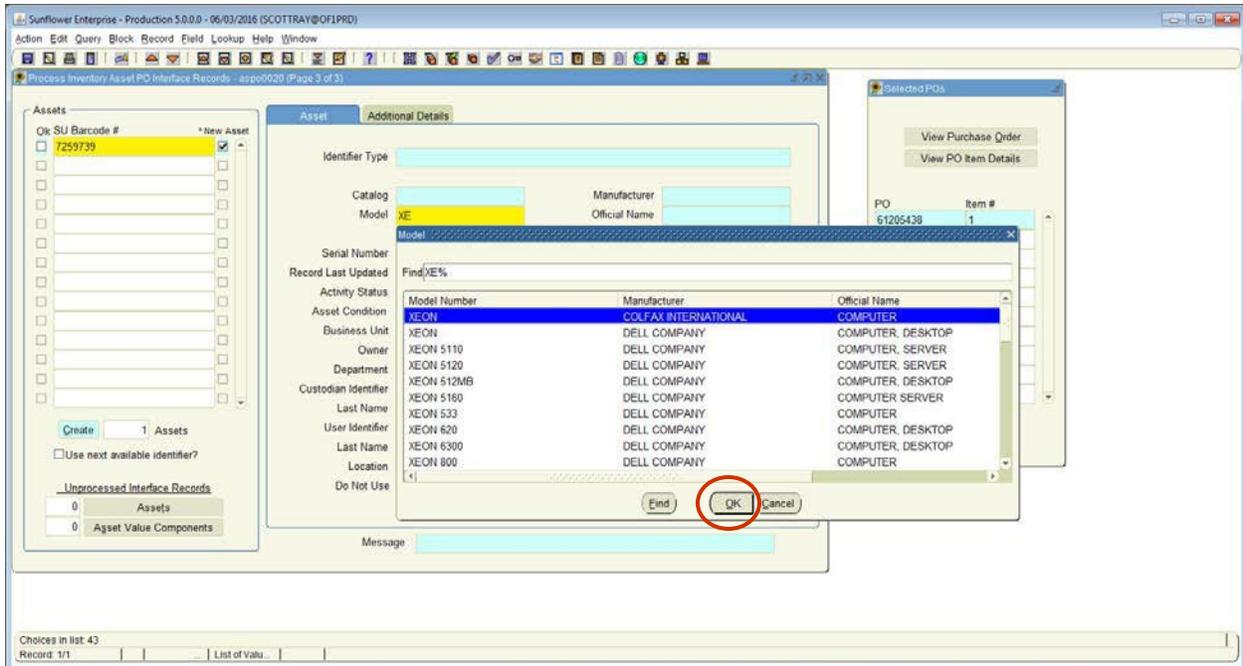
Model/Manufacturer

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.

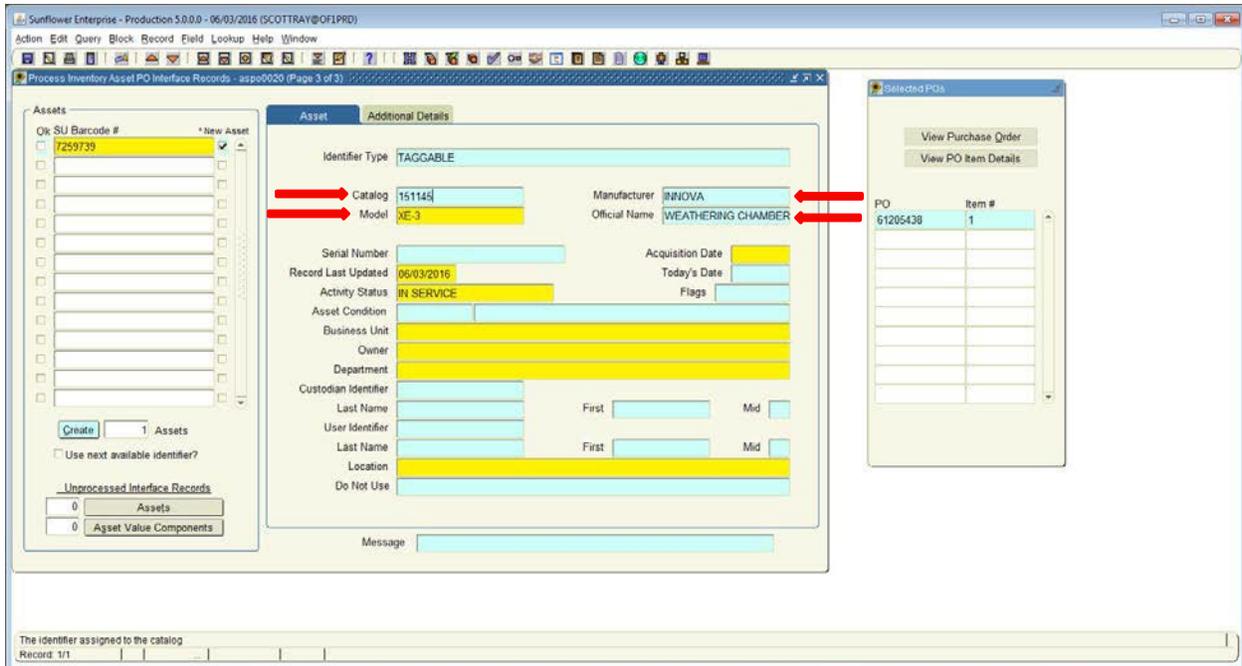
Sunflower User Guide



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



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

Sunflower User Guide

The screenshot displays the Sunflower Enterprise software interface. The main window is titled "Process Inventory Asset/PO Interface Records - aspo0020 (Page 3 of 3)". It features a menu bar with "Action", "Edit", "Query", "Block", "Record", "Field", "Lookup", and "Help". Below the menu is a toolbar with various icons. The interface is divided into several sections:

- Assets:** A list of assets with checkboxes. The first asset has a barcode of 7259739. A "Create" button is visible, along with a checkbox for "Use next available identifier?".
- Asset Additional Details:** A form for entering asset information. The "Serial Number" field is highlighted with a red circle and contains the value "15127161X3H". Other fields include "Identifier Type" (TAGGABLE), "Catalog" (151145), "Model" (XE-3), "Manufacturer" (INJOVA), "Official Name" (WEATHERING CHAMBER), "Record Last Updated" (06/03/2016), "Activity Status" (IN SERVICE), "Acquisition Date", "Today's Date", "Asset Condition", "Business Unit", "Owner", "Department", "Custodian Identifier", "Last Name", "User Identifier", "Last Name", "Location", and "Do Not Use".
- Selected POs:** A table showing purchase orders. The first row has a PO number of 61265438 and an item number of 1.

At the bottom of the window, there is a status bar that reads "The serial number assigned by the manufacturer" and "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)

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

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

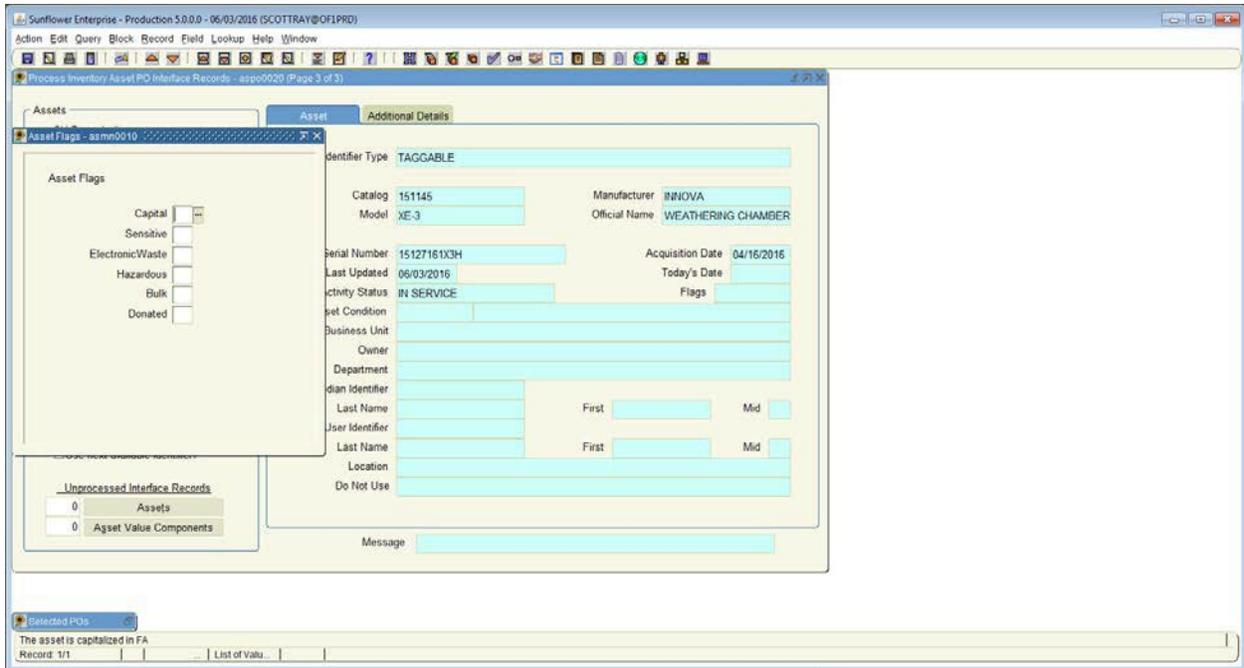
The activity status' long name, e.g. IN-SERVICE

Record 1/1

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



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 main window is titled "Sunflower Enterprise - Production 5.0.0.0 - 06/03/2016 (SCOTTRAY@OF1PRD)". The menu bar includes "Action", "Edit", "Query", "Block", "Record", "Field", "Lookup", "Help", and "Window". The toolbar contains various icons, with the "Save" icon (a blue floppy disk) circled in red. The main content area is divided into several sections:

- Assets:** A tabbed interface with "Asset" and "Additional Details" tabs.
- Asset Flags - asmm0010:** A window with a list of flags: Capital (Y), Sensitive (N), Electronic/Waste (N), Hazardous (N), Bulk (N), and Donated (N). A red arrow points to the "Donated" field.
- Asset Details:** A form with 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), Today's Date, Activity Status (IN SERVICE), and Flags.
- Unprocessed Interface Records:** A section with two rows: "Assets" (0) and "Asset Value Components" (0).
- Selected POs:** A section at the bottom with a message: "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

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

The screenshot shows the Sunflower Enterprise software interface. The main window is titled "Process Inventory Asset PO Interface Records - aspo0020 (Page 3 of 3)". The interface is divided into several sections:

- Assets:** A list of assets with columns for "Ok", "SU Barcode #", and "New Asset". The first asset has a barcode of "7259739".
- Asset Additional Details:** A form for entering asset information. Fields include:
 - Identifier Type: TAGGABLE
 - Catalog: 151145
 - Model: XE-3
 - Manufacturer: INNOVA
 - Official Name: WEATHERING CHAMBER
 - Serial Number: 15127161X3H
 - Acquisition Date: 04/15/2016
 - 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: (empty)
 - Last Name: (empty)
 - User Identifier: (empty)
 - Last Name: (empty)
 - Location: (empty)
 - Do Not Use: (empty)
- Unprocessed Interface Records:** A section with buttons for "Assets" and "Asset Value Components".
- Selected POs:** A section at the bottom with a message: "An Identifier assigned by the institution, e.g. badge no" and "Record 1/1".

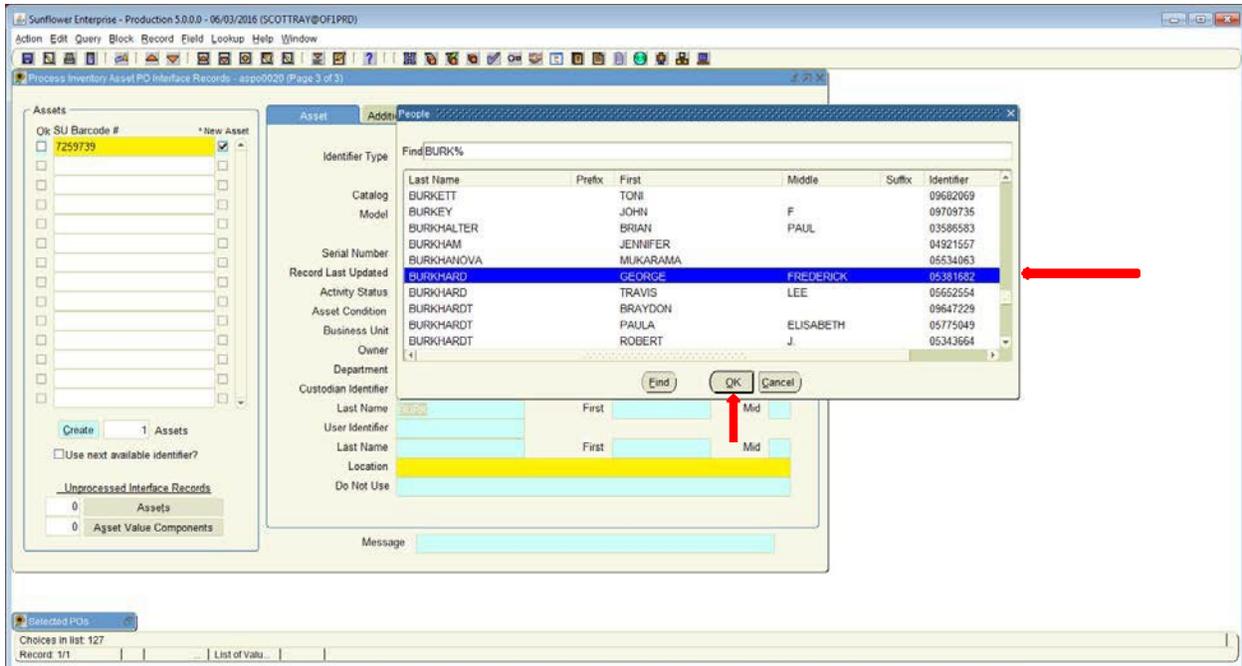
Custodian

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

The screenshot shows the Sunflower Enterprise interface. The main window is titled 'Process Inventory Asset PO Interface Records - aspo0020 (Page 3 of 3)'. On the left, there is a list of assets with a 'Create' button and a '1 Assets' indicator. The main area is divided into 'Asset' and 'Additional Details' tabs. The 'Asset' tab is selected, showing the following 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	
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
User Identifier	05381682	Mid	FRE
Last Name	BURKHARD	First	GEORGE
Location			
Do Not Use			

At the bottom of the window, there is a 'Message' field and a 'Selected POs' section with a note: 'The person's last name, e.g. SMITH' and 'Record 1/1'.

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 shows the 'Maintain Locations' window in the Sunflower software. The window title is 'Maintain Locations - sac2110'. The form contains the following data:

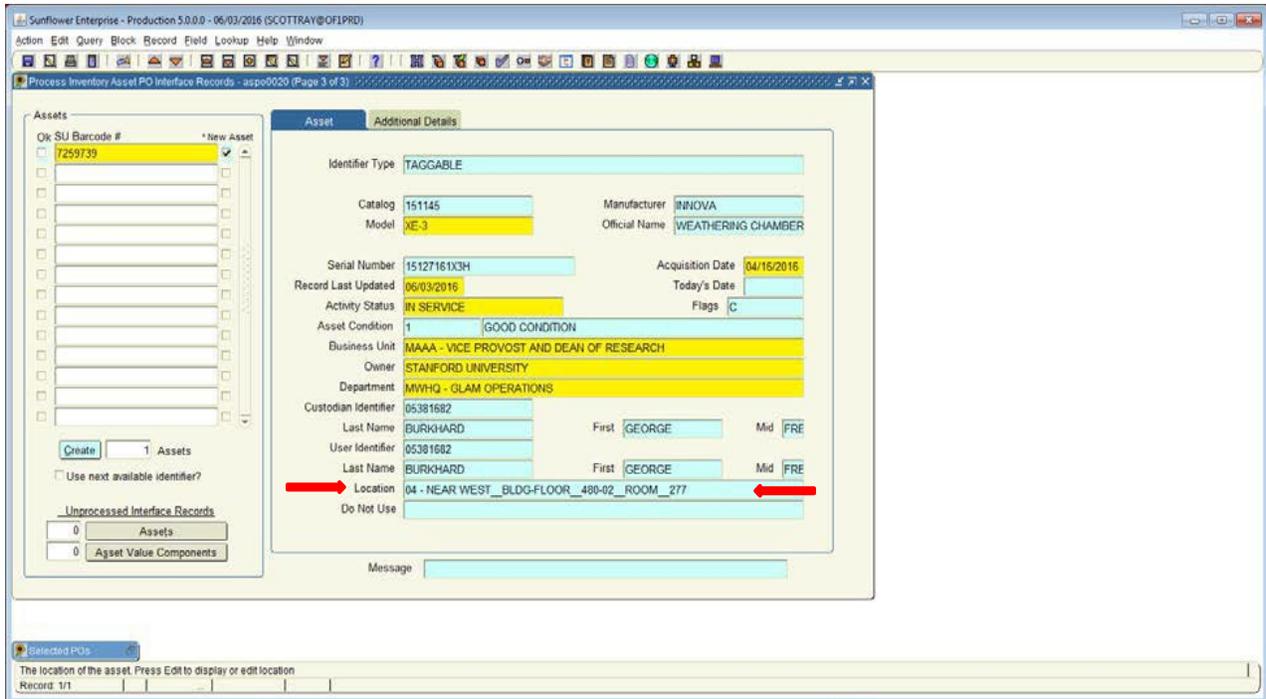
Locations	
Quad	90 - AREAS NOT IN 1-14
BLDG-FLOOR	974R-02
ROOM	204
Leave Blank	
GPS 1	
GPS 2	
GPS 3	
Manufacturer	HEIDELBERG
Official Name	SPECTRALIS TRACKING OCT SYSTEM
Serial Number	SPEC-KT-06964
Acquisition Method	PURCHASE
Acquisition Cost	\$175,457.52
Asset Condition	1 GOOD CONDITION
Activity Status	IN SERVICE
Business Unit	VAAA - SCHOOL OF MEDICINE
Department	XDCI - OPHTHALMOLOGY
Custodian	50002043
User	50002043
Location*	90 - AREAS NOT IN 1-14 - BLDG-FLOOR - 974R-02 - ROOM - 204
Document*	
Do Not Use*	
Global User Fields*	1242771__Insided room 204 with dongles inside drawer next to OCT_90653.09_2017__ALLOW

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

The site's long name, e.g. LIVERMORE
Record: 1/1

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

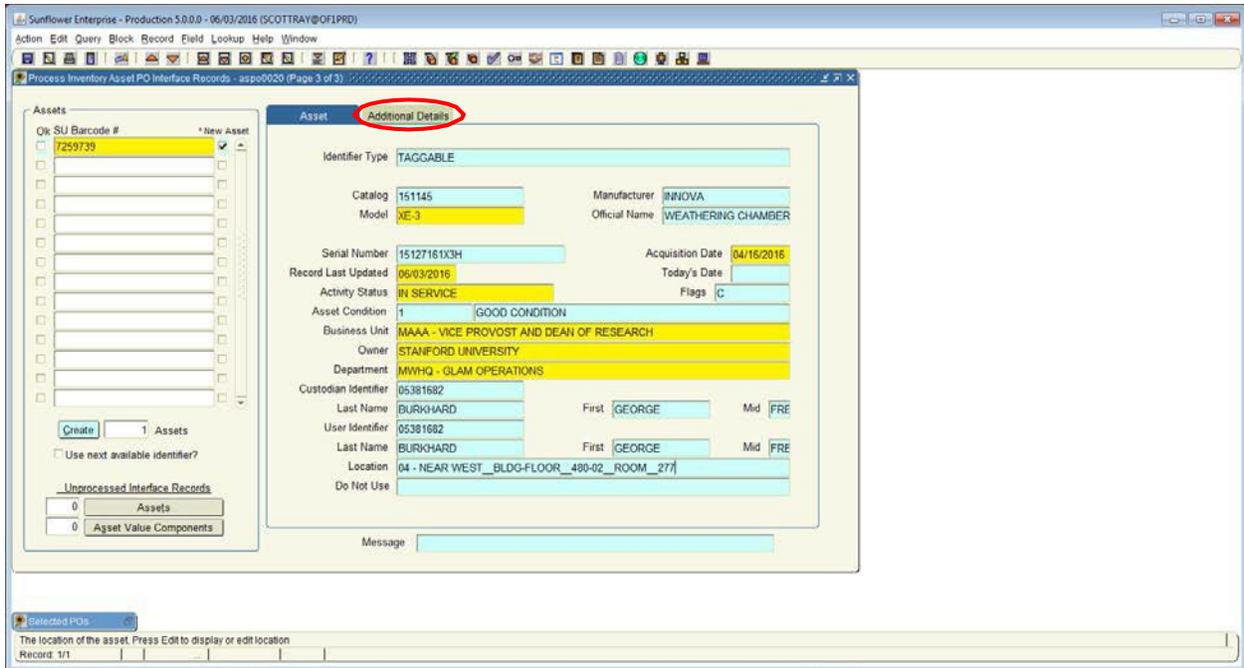
Sunflower User Guide



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

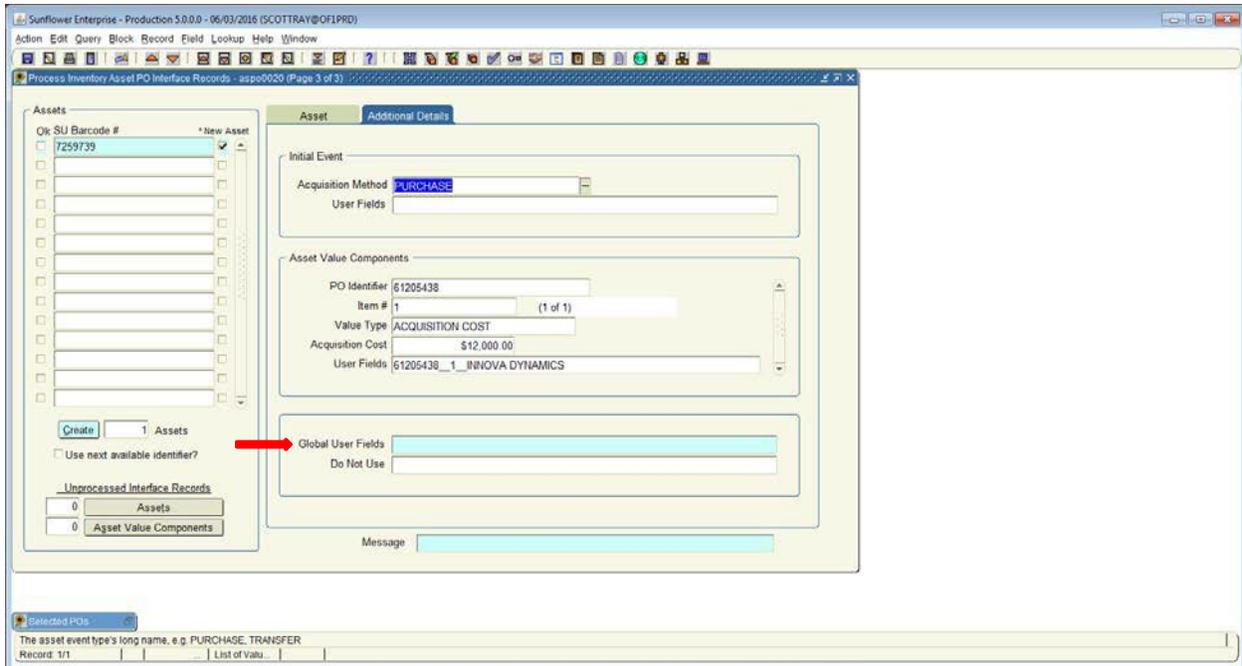
You are ALMOST done.

Sunflower User Guide



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

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

The screenshot displays the 'Custom Attributes of Asset States' form in the Sunflower Enterprise software. The form contains various input fields for asset details. Three red arrows point to the 'Other Description', 'Location Detail', and 'Year Manufactured' fields. The 'Year Manufactured' field is populated with the value '2016'. A blue save icon in the top-left corner of the ribbon is circled in red. The bottom status bar shows '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

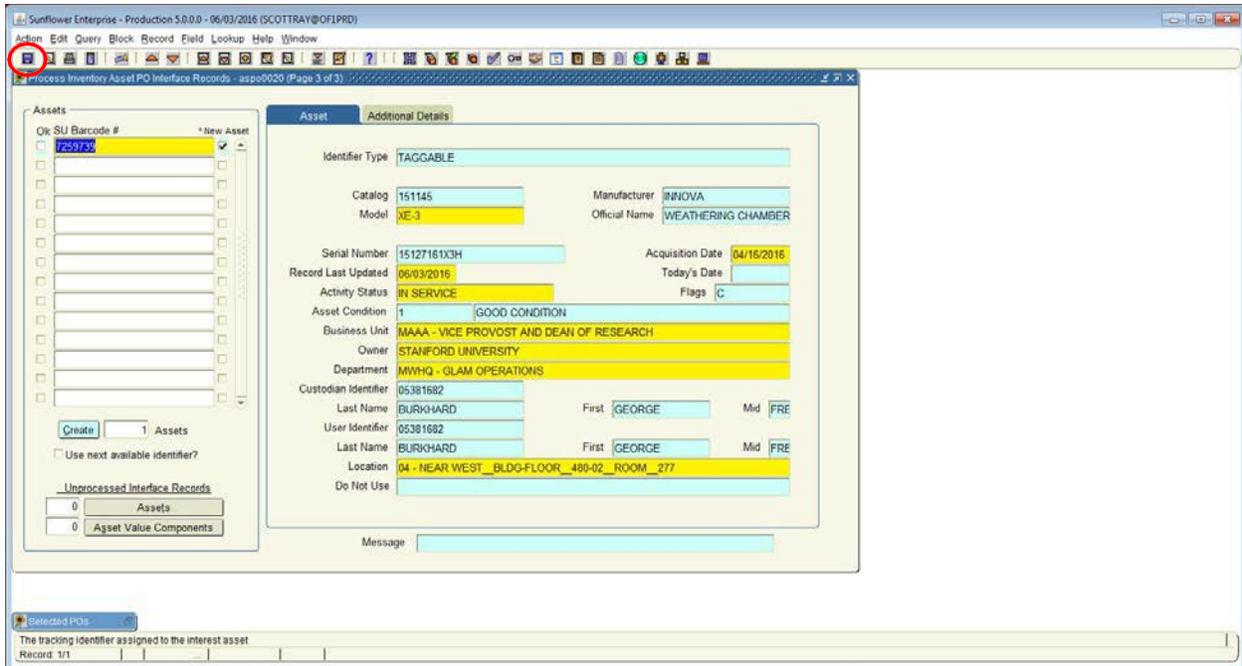
The screenshot displays the Sunflower Enterprise interface. The main window is titled "Process Inventory Asset PO Interface Records - aspo0020 (Page 3 of 3)". The "Asset" tab is selected, and the "Additional Details" section is active. The "Initial Event" section shows "Acquisition Method" as "PURCHASE" and "User Fields" as an empty field. The "Asset Value Components" section shows "PO Identifier" as "61205438", "Item # 1", "Value Type" as "ACQUISITION COST", and "Acquisition Cost" as "\$12,000.00". The "Global User Fields" field is highlighted with a red arrow and contains the value "2016_ALLOW". The "Do Not Use" field is empty. The "Message" field is also empty. The "Assets" list on the left shows one asset with barcode # 7259739. The "Unprocessed Interface Records" section shows 0 Assets and 0 Asset Value Components. The "Selected POs" section at the bottom shows "Record 1/1" and "List of Valu...".

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

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

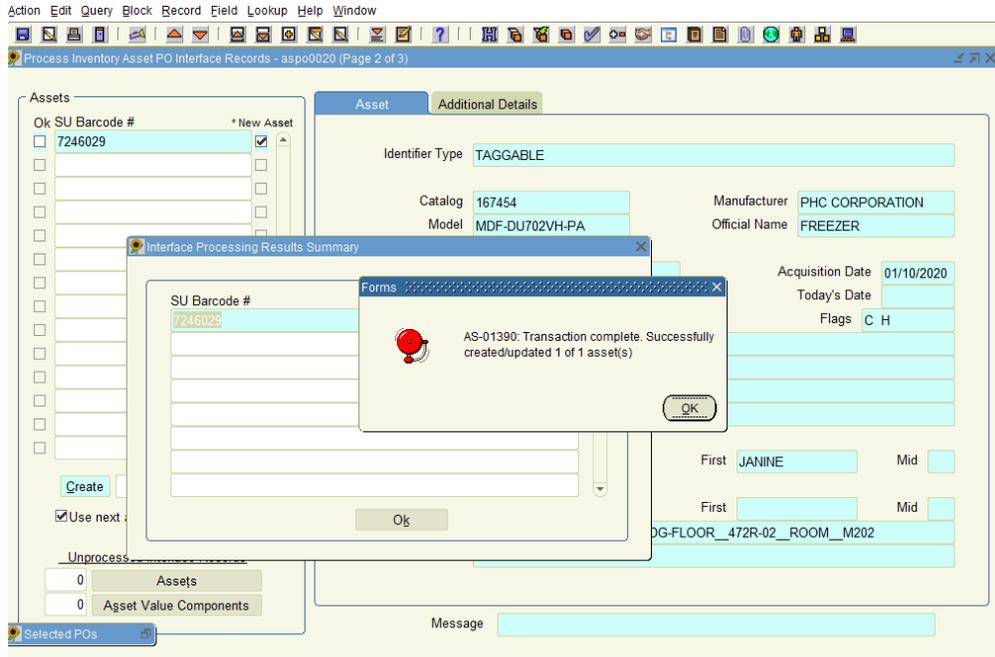
NOTE: The record is not yet saved.

Sunflower User Guide

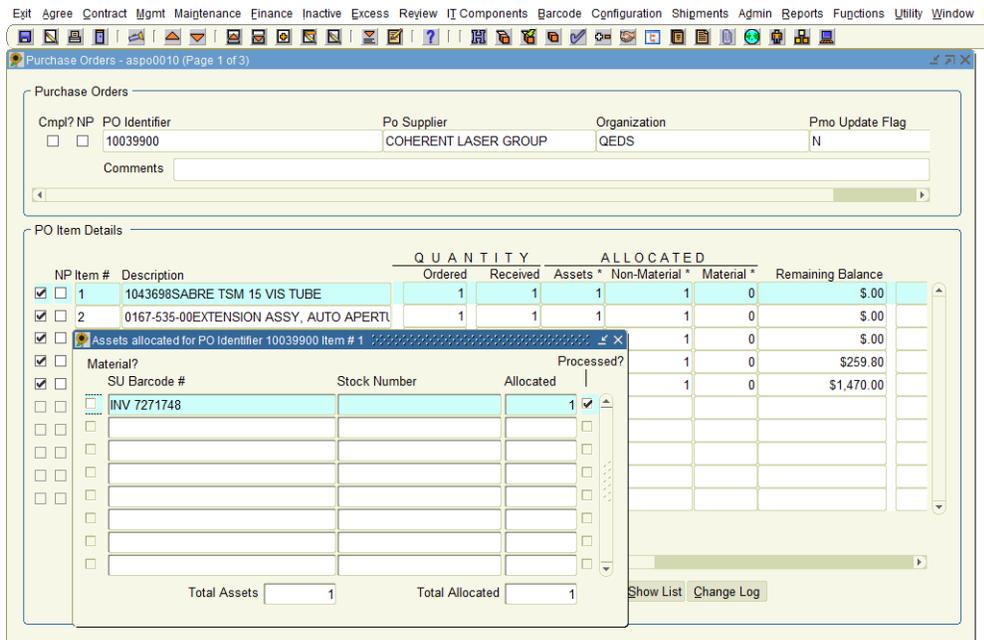


Review the information one final time and when ready, select the **SAVE** icon to save the record.

Sunflower User Guide

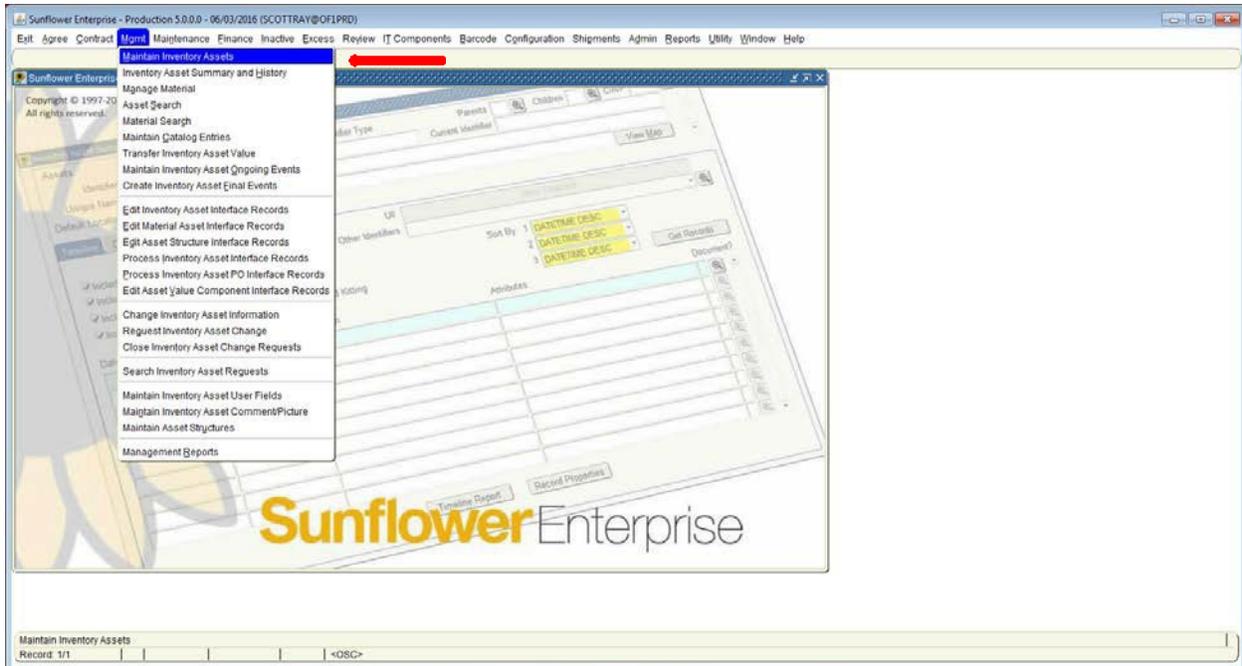


You will receive the confirmation above if the record saves correctly.



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

The screenshot shows the 'Inventory Assets' form in the Sunflower application. The 'SU Barcode #' field is highlighted with a red circle and contains the value '7246012'. The 'DPA' field is also highlighted with a red circle and contains the value 'BARANY MICHAEL R 09749268'. Other fields include 'Manufacturer' (PHC CORPORATION), 'Model' (MDF-DU702VHA-PA), 'Acquisition Date' (01/10/2020), and 'Owner' (STANFORD UNIVERSITY).

Field	Value
SU Barcode #	7246012
U/T	T
Other Identifiers (1)	INV / 7246012
Type	SU Barcode #
Released?	Y
Existing interest asset	
Default Location*	
Catalog Identifier*	170394
Manufacturer	PHC CORPORATION
Official Name	FREEZER, UPRIGHT
Serial Number	190300665
Acquisition Method	PURCHASE
Acquisition Cost*	\$11,095.56
Asset Condition	1 GOOD CONDITION
Activity Status	IN SERVICE
Business Unit	VAAA - SCHOOL OF MEDICINE
Department	VBNK - BIOBANKING
Custodian	05919321
User	
Location*	90 - AREAS NOT IN 1-14 _BLDG-FLOOR_472R-02_ROOM_M202
Document*	
Do Not Use*	
Global User Fields*	2019_ALLOW

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.