SUNFLOWER USER GUIDE
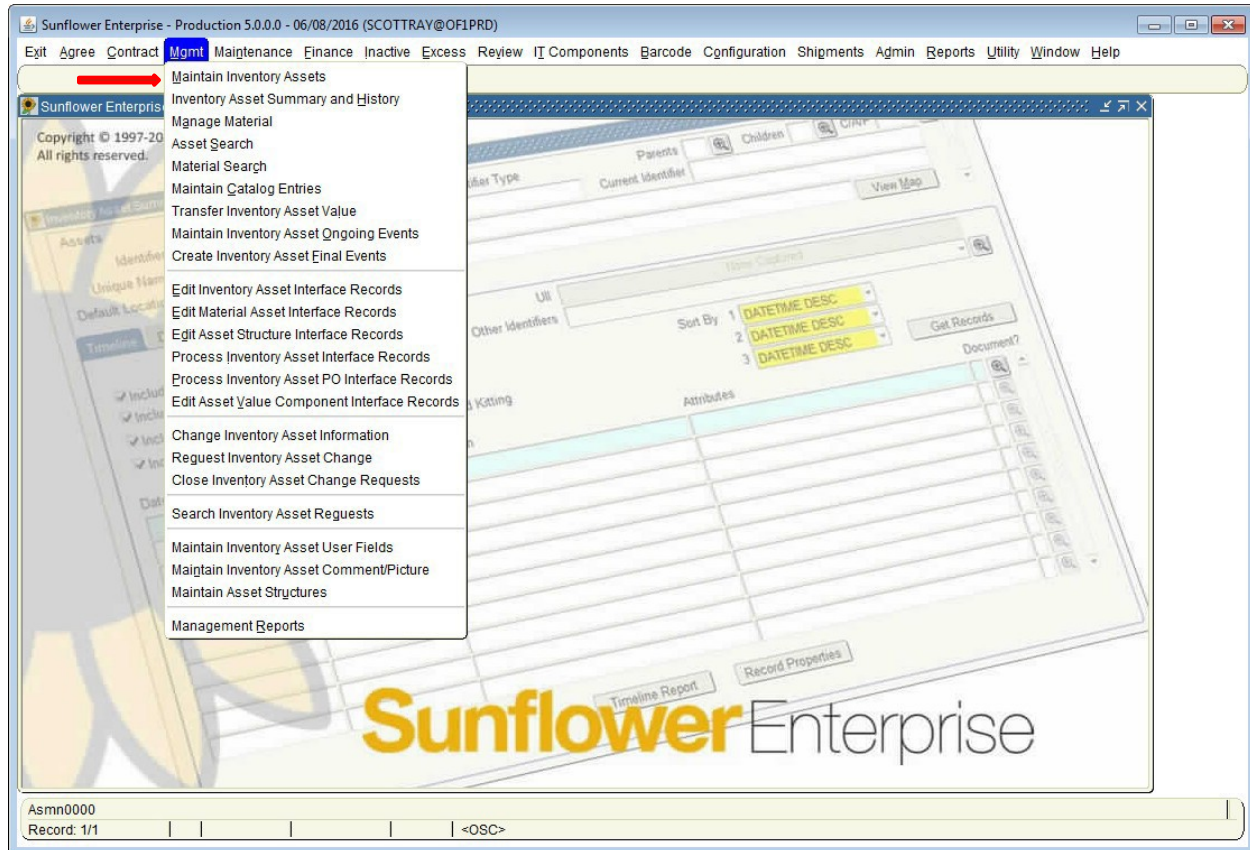
Creating an Asset Record from Scratch

For use with Stanford property

To create a record from scratch select 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, 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.

Other Acquisition Methods include:

- Donation

- Lease

- Loan (incoming)

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 Model#/Manufacturer combination.

Highlight that and click the **OK** button.

Note: If you do not see the combination you need, submit a Catalog Request via SPARC

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 is frequently used as a secondary verification method, should the Property tag fall off.

Ensure your record includes 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.

Acquisition Cost

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 – you can disregard it, the Sunflower financial module is not used by Stanford.

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

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" defaults to the current date.

Asset Condition

Asset condition is "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 (Please do not use Excess as an activity status – that is automatic when the excess record is completed.)

Flags is an optional important. If you wish to enter 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 UPA 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" = Capital).

Business Unit

The overarching area of the University that your department 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.

Owner

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.

Department Name

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.

Custodian

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).

User

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.

Location

The multi-part location screen consists of 3 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-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" or click the blue 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.

Global User Fields

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. The field of greatest importance here is the year of manufacture.

Additional Fields Include:

- Other Description

- Location Detail

- Fleet Garage ID #

If the asset you are creating the record for is a vehicle, be sure to enter the four digit Fleet Garage ID # in the field.

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.