Section 7

Reporting in Sunflower

Sunflower User's Guide

File   Edit   View   Favorites   Tools   Help

Back   Search   Favorites

Address   https://ofweb.stanford.edu:8051/pls/OF1_PRD/oraclemypage.home   Go   Links

ORACLE Applications

Welcome Dunn, Stanley W.

Main Menu

Navigate

Procurement Cards (Full Access)
SU Internet Procurement
SU SFA Logon
SU Workflow Notifications
SU iJournals Central
SU iJournals Public
SU iJournals Specialist

SU SFA Logon

Sunflower Assets Forms
Sunflower Assets Reports
Sunflower Assets HTML Transactions

Done   Internet

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There are three ways to access reports in Sunflower. If all you are going to do is run reports, you can access Sunflower Assets Reports. If you will be doing record entry or maintenance, and access the system via Sunflower Assets Forms, you can still access reports through the pull-down menus, as shown on the next page.

Sunflower Assets - Production 3.7.1.0   Powered By **ORACLE**

ASUT6000 Reports Main Menu

Stanley Dunn

Agreement Reports

Management Reports

Finance Reports

Inactive Reports

Excess Reports

Review Reports

Administration Reports

User Defined Reports

Previously Run Report
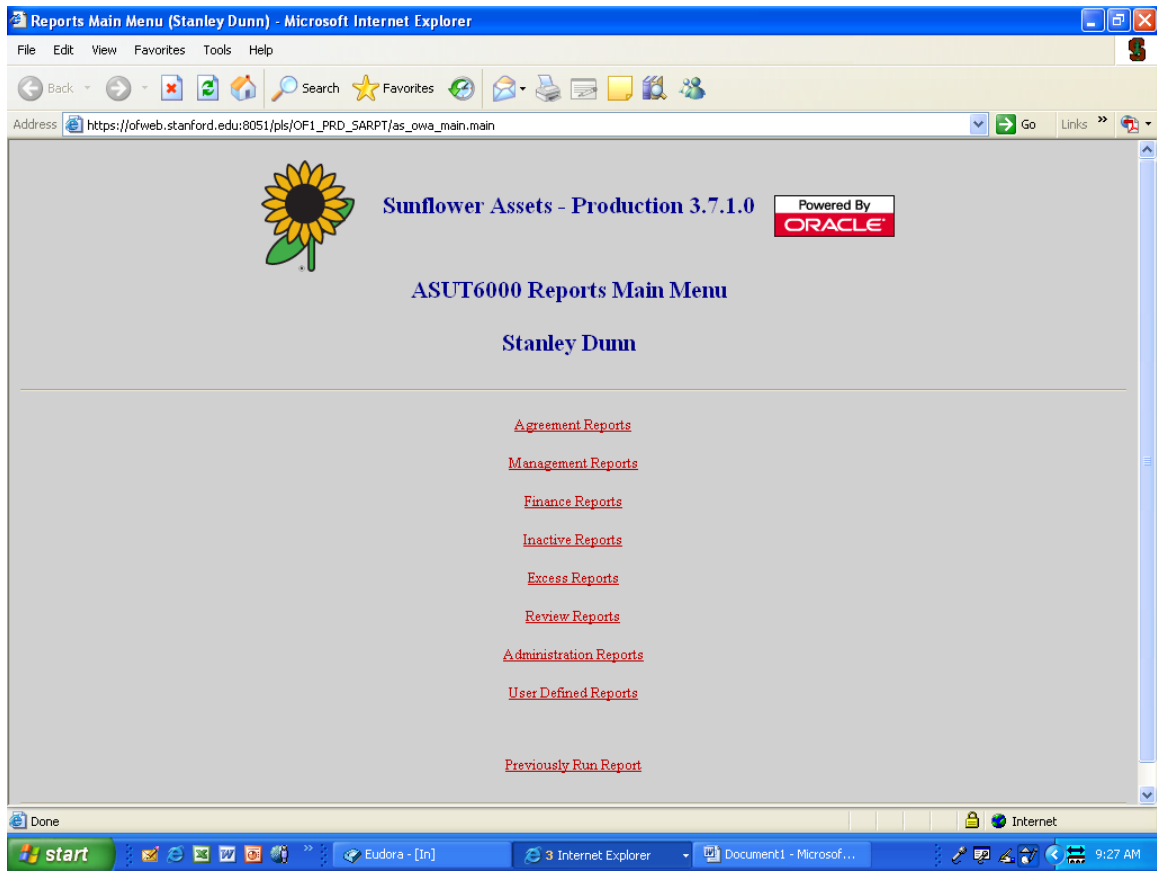
When accessing via Reports, the first screen you will see is the main
reporting menu. Select the type of report you want (property record
information will be found in the "Management Reports" link. Information
regarding Excess Requests will be found in the "Excess Reports" link.
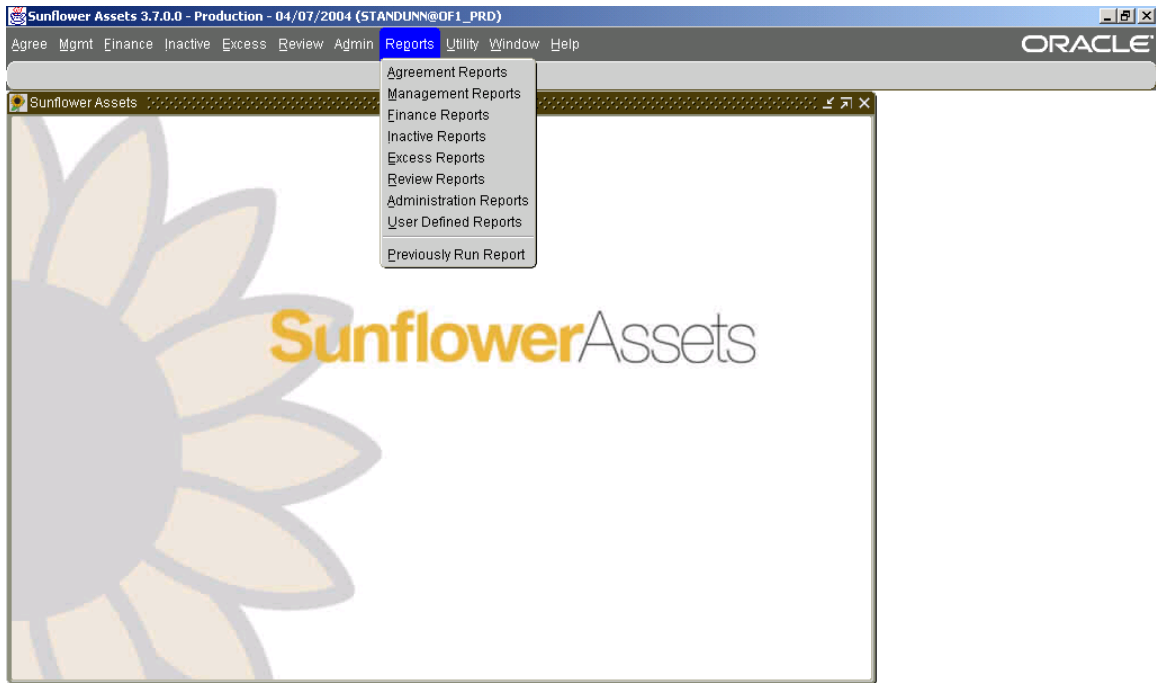
If you have accessed the system via "Forms", you can access reports by using the "Reports" pull-down menu, and select the reports group from the choices available, or you can select reports from any of the different pull-down menus (Mgmt, Excess, etc). Reports are always the last menu choice in the various module pull-down menus.
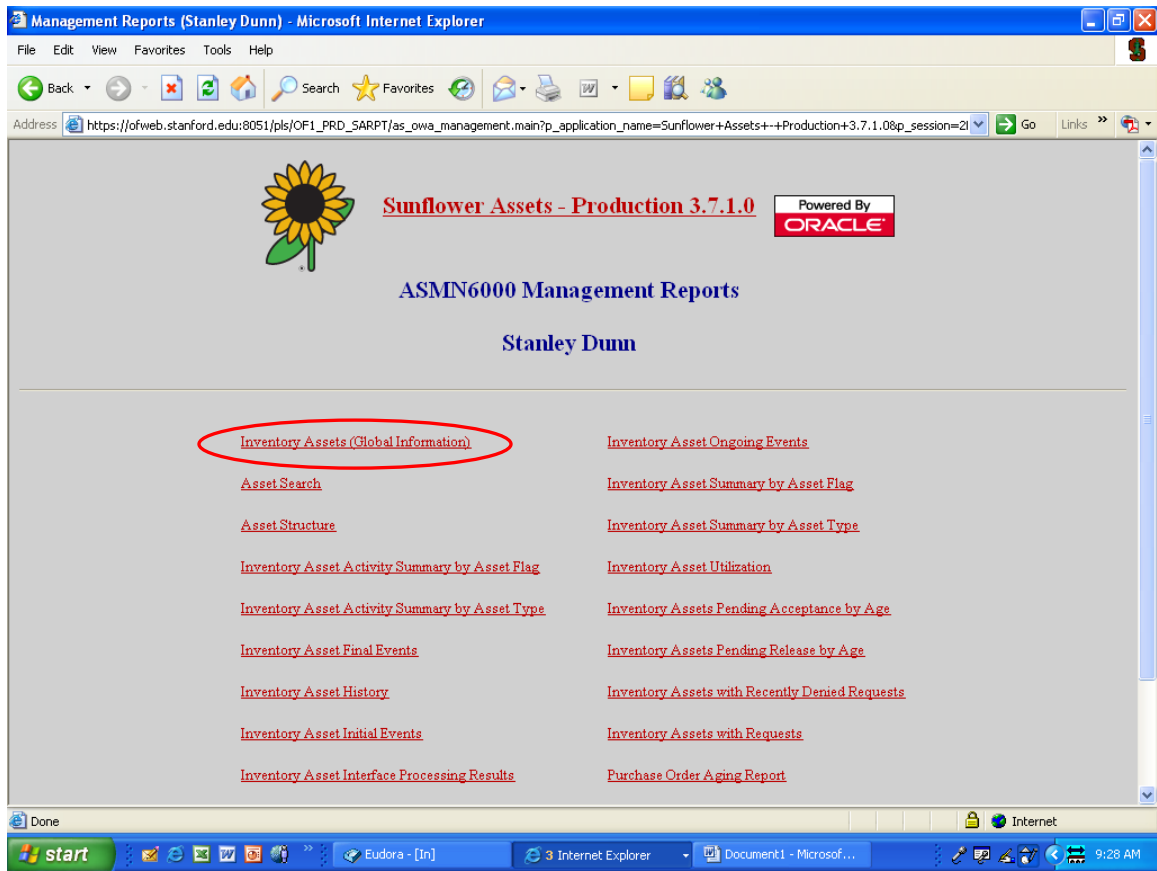
The main reporting environment is in Management Reports, called "Inventory Assets (Global Information)". This is where you would run any report to obtain information from the property records in Sunflower.

The screen that appears is made up of two large sections. The upper half is for inputting the criteria you are searching for. You can input information into as many or as few of these fields as desired, depending on how narrow you want the search to be.

The fields are not case-sensitive, so it doesn't matter if you use capital letters or lower-case letters, but the spelling must be exact, and any field must contain the entire word or phrase as it would appear in the property record. For example, the Steward name for OSR is "Office of Sponsored Research Operations". Putting only "Office of Sponsored Research" in the Steward field would result in no data being found. You must enter the entire name. Using wildcards, however, is permitted (in Sunflower, the wildcard is '%') so entering "Office of Sponsored Research %" will produce the data for all assets in the steward.

The more fields entered, the narrower the search. You can use location, custodian, user, steward, owner, etc to narrow down the results as needed.

	Site/Off-Site Type	Structure Level 1 Type	Structure Level 1	Structure Level 2 Type	Structure Level 2
Location		BUILDING		ROOM	

Assets As Of _____ (MM/DD/YYYY)

Inventory Asset Identifier _____

Serial Number _____

	Identifier	Type
Document		

You can use '%' as a wildcard character in the Identifier field

☐ Include Only Assets With an Expected Return Date?
- OR -
Include Only Assets With an Expected Return Date Between _____ (MM/DD/YYYY) and _____ (MM/DD/YYYY)

Include Which of the Following?

Active / Retired / Both ACTIVE

☐ Asset Details (Steward, Custodian, User, Location, Expected Return Date, Asset Type and Asset Condition)
☐ Inventory Asset Comments
☐ Inventory Asset Initial Event Details
☐ Inventory Asset Ongoing Event Details
☐ Inventory Asset User Fields
☐ Identifiers of Related Interest Assets
☐ Asset Value Components

How Would You Like the Assets to be Grouped?

Done | Internet

start | Eudora - [In] | 3 Internet Explorer | Document1 - Microsof... | 9:29 AM

The lower half of the screen (you must scroll down to see it) allows you to determine how much information you want for each asset, and how you want the information sorted. You can choose to see only Active assets (this is the default setting) or you can select to see only retired assets or both active and retired assets.

You can also select the amount of information by checking any of the seven boxes available. If you check no boxes at all, the default setting is to show the tag number, description, model number, serial number, and acquisition cost of each asset.

Include Which of the Following?

Active / Retired / Both   [ACTIVE ▼]

☐ Asset Details (Steward, Custodian, User, Location, Expected Return Date, Asset Type and Asset Condition)
☐ Inventory Asset Comments
☐ Inventory Asset Initial Event Details
☐ Inventory Asset Ongoing Event Details
☐ Inventory Asset User Fields
☐ Identifiers of Related Interest Assets
☐ Asset Value Components

How Would You Like the Assets to be Grouped?

[NONE ▼]

☐ Display Only Asset Quantity and Value Totals by the Selected Break Group

How Would You Like the Assets to be Sorted?

1	2	3
[ASSET IDENTIFIER ▼]	[ASSET IDENTIFIER ▼]	[ASSET IDENTIFIER ▼]

[Submit]   [Reset]

Management Reports

You also can select how you want the results grouped and sorted. Grouping assets by Steward, location, or custodian may be useful in some reports, as each grouping has a subtotal of the number of assets and total acquisition cost for each of the groupings. Also, if the report is generated in Acrobat, each group will be assigned a 'bookmark' for easily accessing that group of asset data. You also have the option of sorting assets by up to three variables, such as Steward, Custodian, Location, Ownership. Etc. Use the pull-down menus for both Grouping and Sorting to see the list of variables you can select.

In this example, we are going to search for all Dell computers with the model number GX200 that are in the steward "Property Management Office Operations" We used the wildcard after Dell, since we weren't sure if the actual manufacturer name was Dell Computers, Inc, or Dell Company, or just Dell. This way, we know we will capture the data regardless how the manufacturer name exists in the system.

Once you have entered the search criteria, you will select how much information you want, and how you want it sorted, as seen on the next page.
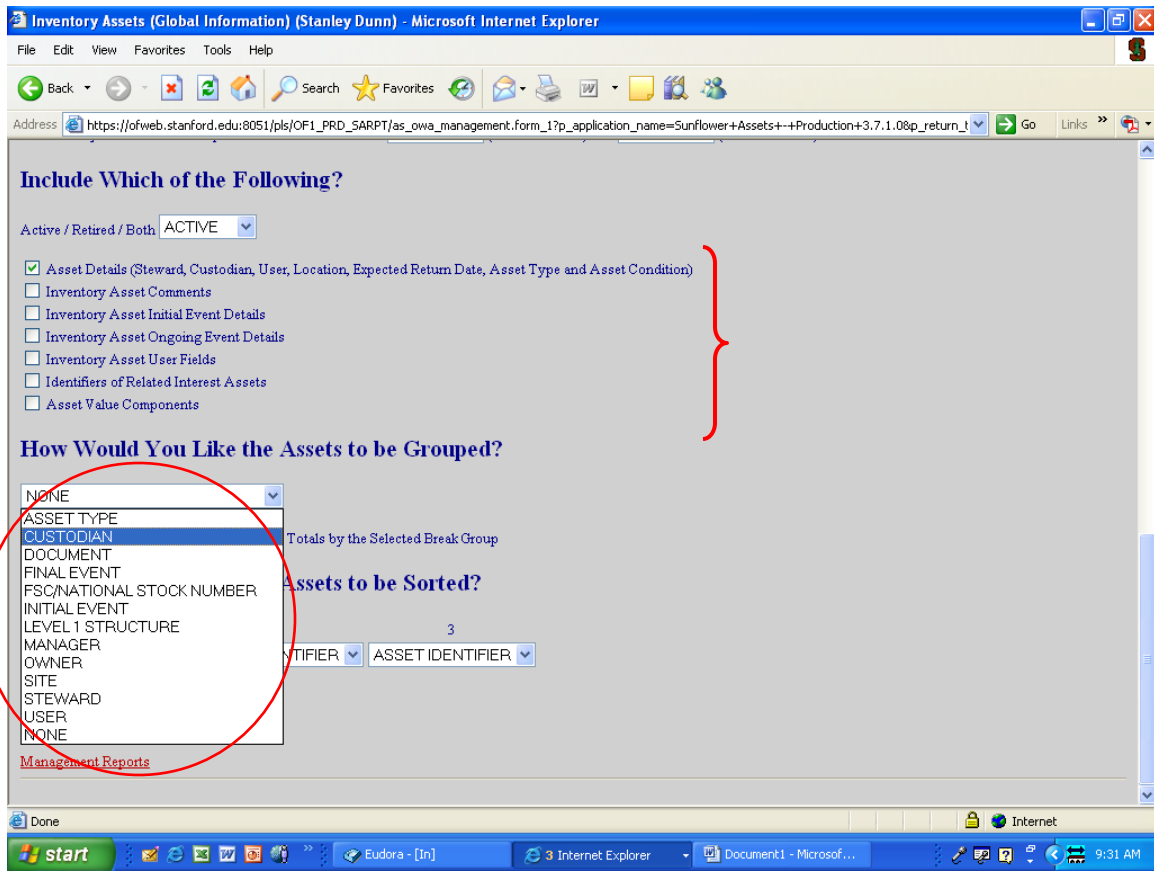
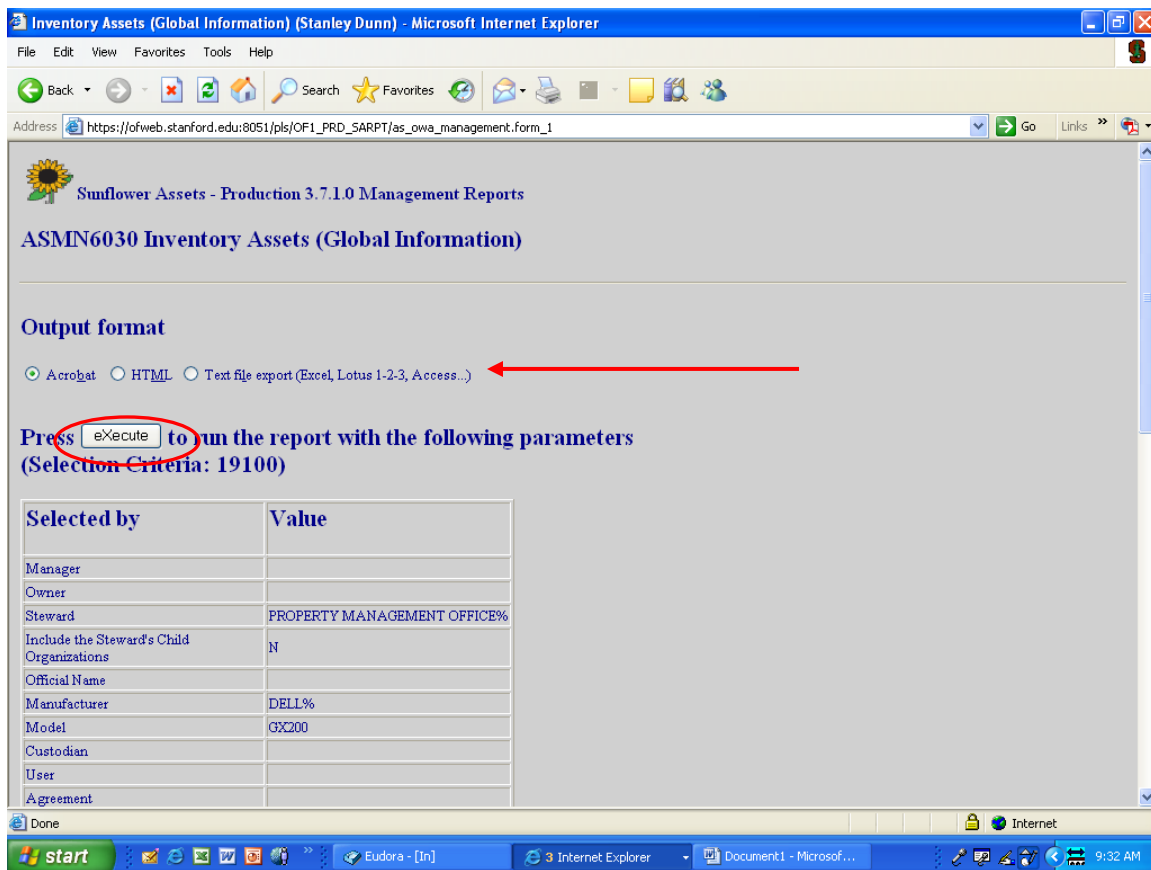Most of the time, information such as location and custodian are helpful, so the first box should be checked, so that information is included. If you want to include any comments that have been entered, or want to include acquisition information, data from the Global User Field (year of manufacture, net book value, etc.) or information regarding the breakdown of cost elements, you would check any of the other boxes to capture that data.

Then you can select how you want to group the data, whether by Custodian, Building (Level 1 Structure), user, etc. by using the list of values in the pull-down menu for that field.
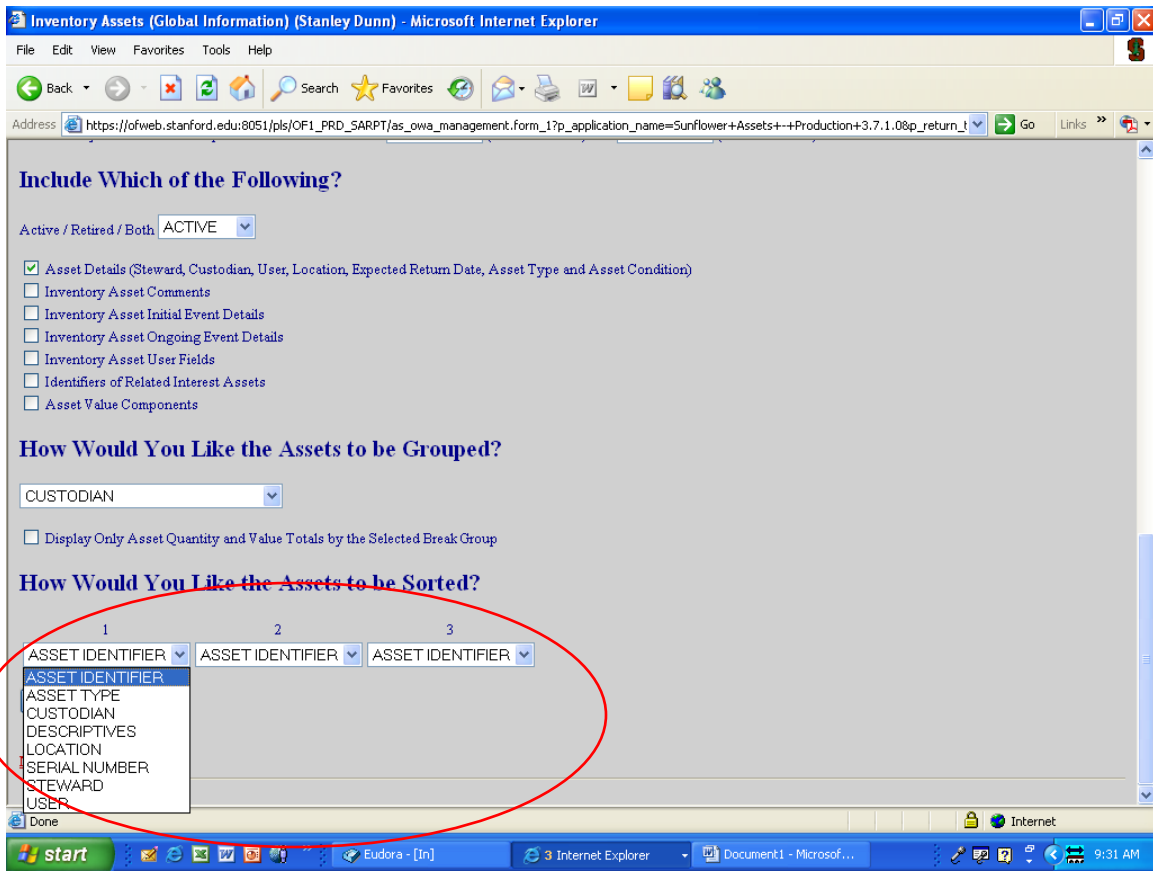
You can further sort the data within each grouping by selecting other data elements from the 3 available sorting criteria fields. Again, simply select the choice desired from the list of options in the pull-down menu for each field.

Once you have set all of the criteria for your search and the parameters for the data output, you click on the "Submit" button at the very bottom of the screen. (You may also simply hit "Enter", as the submit button is highlighted by default).
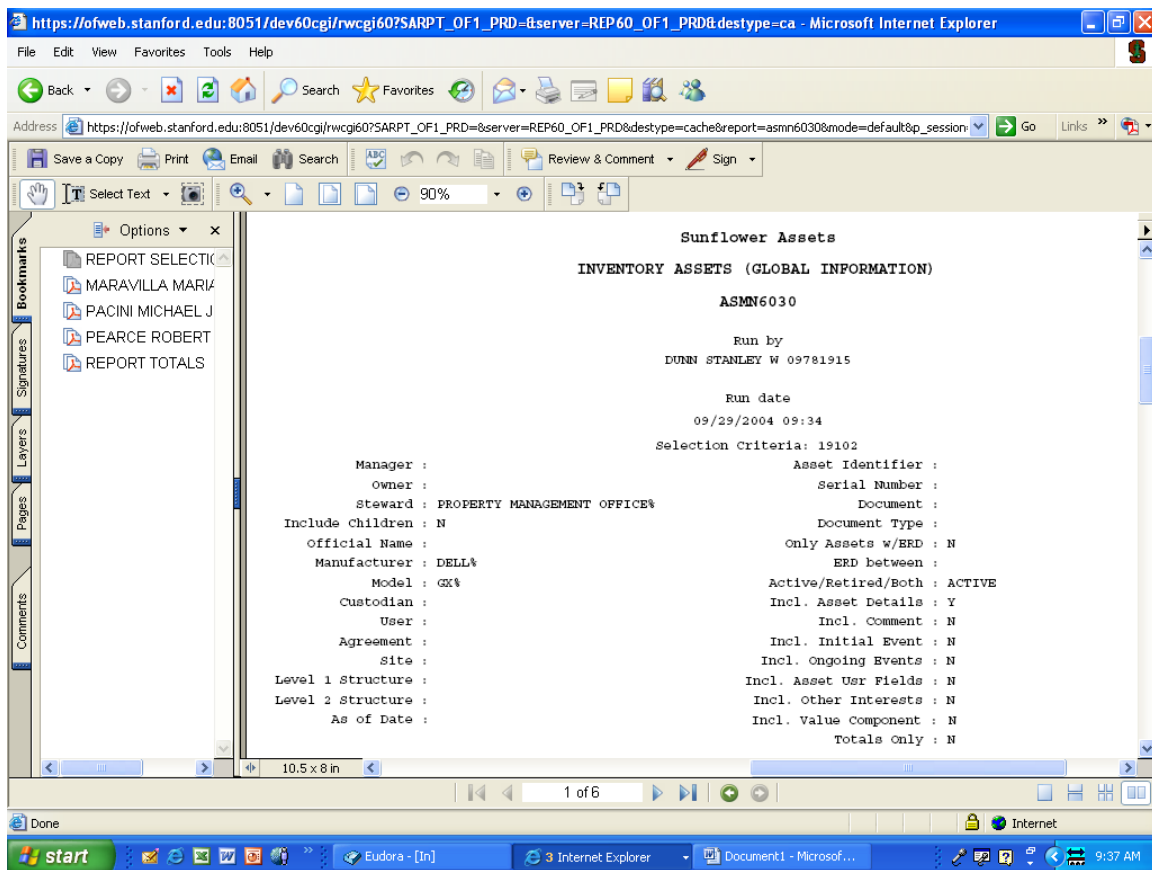
Once you submit the report, you will see a confirmation page. This page will show you what your search criteria and output settings are, so you have another opportunity to review before actually running the report.

This confirmation page will also alert you to any errors the system recognizes, such as a non-existent steward or custodian name, etc. Should you receive such an error message, simply click on the "Back" button on your browser, and you will return to the criteria input page to make corrections.

Some reports also give you an option of getting your results in Acrobat format, or getting them in Text format, which can then be exported into Excel. Click the choice you prefer.

Once you have confirmed the entries are correct, click on the "Execute" to run the report. Reports are run on the main server, not on your computer, so if you are running a lengthy report, you can perform other tasks without impacting the speed of the reporting activity.

File   Edit   View   Favorites   Tools   Help

Back ▾ | ✕ ↻ ⌂ | Search ★ Favorites | ✉ ▾ 🖨 ▤ 📒 💿 👥

Address https://ofweb.stanford.edu:8051/dev60cgi/rwcgi60?SARPT_OF1_PRD=&server=REP60_OF1_PRD&destype=cache&report=asmn6030&mode=default&p_session   ▾ → Go   Links ▸

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                          Sunflower Assets

                    INVENTORY ASSETS (GLOBAL INFORMATION)

                               ASMN6030


                               Run by
                      DUNN STANLEY W 09781915


                              Run date
                         09/29/2004 09:34

                     Selection Criteria: 19102

        Manager :                          Asset Identifier :
          Owner :                             Serial Number :
        Steward : PROPERTY MANAGEMENT OFFICE%     Document :
Include Children : N                          Document Type :
  Official Name :                       Only Assets w/ERD : N
   Manufacturer : DELL%                      ERD between :
          Model : GX%                  Active/Retired/Both : ACTIVE
      Custodian :                        Incl. Asset Details : Y
           User :                          Incl. Comment : N
      Agreement :                       Incl. Initial Event : N
           Site :                       Incl. Ongoing Events : N
Level 1 Structure :                   Incl. Asset Usr Fields : N
Level 2 Structure :                     Incl. Other Interests : N
     As of Date :                     Incl. Value Component : N
                                           Totals Only : N
```

Bookmarks | Signatures | Layers | Pages | Comments

🗐 Options ▾   ✕

📄 REPORT SELECTIO
📄 MARAVILLA MARIA
📄 PACINI MICHAEL J
📄 PEARCE ROBERT
📄 REPORT TOTALS

10.5 x 8 in

◀◀ ◀   1 of 6   ▶ ▶▶ | ○ ○

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start | 📧 🎯 📧 📝 📷 🎮 ▸ | Eudora - [In] | 3 Internet Explorer | Document1 - Microsof... | ✏ 🔲 ⓘ 🔊 ◀ 🔋 9:37 AM

Here is an example of the results (in Acrobat) from our search. The first page is always a title page. This page includes the search criteria, the date of the report, and the report number (which can be used to re-run this report at any time, with updated refreshed data results).

Notice that along the left side of the report is a list of "bookmarks", which correspond to the criteria used to "Group" the data results. In our example, we used Custodian, so each custodian on the property records is listed alphabetically, and you can go directly to the records for each custodian simply by clicking on their name.
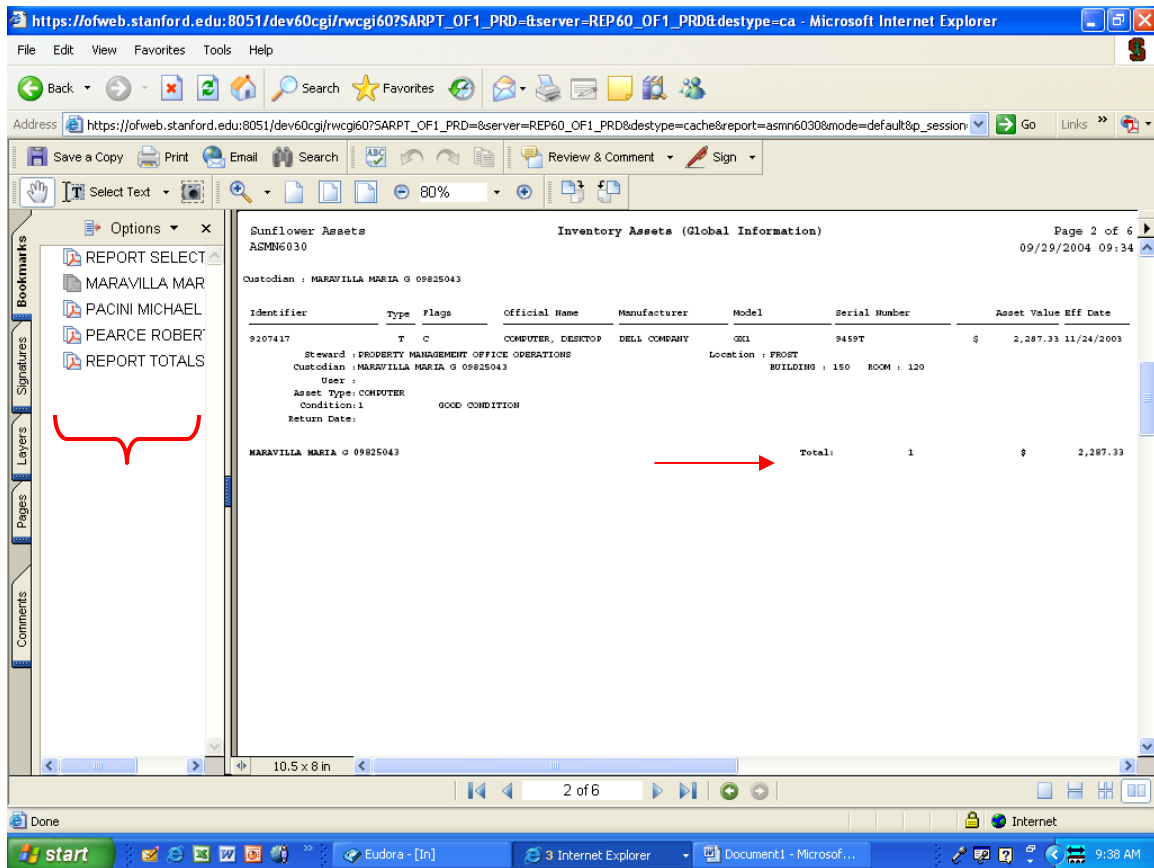
Scrolling a little further down the report, you find the data results, based on the boxes you checked for what you wanted to appear on your report.

In Acrobat format, each group (Custodian in our example) is subtotaled for number of items and total acquisition cost for them.

Later in this chapter we will see output in text format as well, and another section of the manual deals with exporting that data into Excel format.

Now we will look at some of the most common reports needed by Property Administrators.

To print a Property Record for a single asset, whether for an untaggable item to be filed, or in response to a departmental request, use the Inventory Assets (Global Information) selection from the Management Reports menu.

In the criteria selection screen, type the SUID barcode tag number (last seven digits only) into the Inventory Asset Identifier field. Please see next page before continuing.

In the "Include Which of the Following" section of the criteria screen, check each of the boxes, as you want to capture all of the information in the database for an official property record.

Next, hit Enter, or click Submit at the very bottom of the criteria screen (you need to scroll all the way down to click the button – Enter is a faster method).

File   Edit   View   Favorites   Tools   Help

Back   Search   Favorites

Address   https://ofweb.stanford.edu:8051/dev60cgi/rwcgi60?SARPT_OF1_PRD=&server=REP60_OF1_PRD&destype=cache&report=asmn6030&mode=default&p_session   Go   Links

Save a Copy   Print   Email   Search   Review & Comment   Sign

Select Text   80%

Options   ×

Bookmarks
REPORT SELECTION
REPORT TOTALS

Signatures   Layers   Pages   Comments

```
Sunflower Assets                          Inventory Assets (Global Information)                    Page 2 of 4
ASMN6030                                                                                          09/29/2004 09:4

Identifier          Type  Flags      Official Name    Manufacturer    Model       Serial Number        Asset Value Eff Date

3166178             T    C           COMPUTER, DESKTOP DELL COMPANY    GX300       F3YL001         $     2,547.12 09/24/2004
       AGR 3166178

              Steward :OFFICE OF RESEARCH ADMINISTRATION OPERATIONS        Location : STERN
              Custodian :DUNN ALEXANDER R 05282287                                   BUILDING : 040   ROOM : 122
                   User :
        Asset Type: COMPUTER
             Condition:1            GOOD CONDITION
             Return Date:
       Initial Event :CAMS MIGRATION                  on : 08/31/2000    User Fields :
       Ongoing Events :

             User Fields :
       Global User Fields :FA Asset ID:292776__Other Description:DELL OPTIPLEX GI300__Department Tag Number:__Asset User:DUNN, STAN__Net Book
                          Value:0__Year Manufactured:2000__Date Retired:__Retirement Status:__Alternate Location:__IDC Flag (PMO Use
                          Only):ALLOW__Last Calibration/Maintenance:__Next Calibration/Maintenance:
                  Comment :TEXT
                          *** JOB USER APPSon 10/31/2003 02:43:02

                          FY 99/00.  INCLUDES:  133MHZ FSB, W/4X AGP VID SLOT 60V 10/100 NIC W/RWU, INT AUDIO, 256K CACHE; QUIETKEY KEYBOARD; MS
                          INTELLIMOUSE; 256MB NON-ECC, PC800, 1RIMM, 16 DEVICES; HARMAN/KARDON SPEAKERS; 20/48X EIDE CD-ROM; RESOURCES CD;
                          INTEGRATED SOUND BLASTER; 8/4 32X CD-RW FOR WIN 98 WIN NT & WIN2000 CD; 17: DELL MONITOR; NVIDIA TNT2 M64 32MB 4XAGP
                          VIDEO CARD; 20 GB 7200RPM EIDE; 3.5 1.44MB FLOPPY DRIVES; WIN 2000 FAT32 CD. CHGD AD PER FIN RECON 01-23-01 BB./BMN.
                          Chgd Loc, Cust, User 11-29-01 SWD.

             Components:    Description       Dollar Value      User Fields
                           ACQUISITION COST                    $0 Purchase Order Number:J90987__Purchase Order Line Number:__Supplier:__Requisition
                                                              Number:__Purchase Account Number:__Funding Source Award Number:
                           FIXED ASSET COST         $2,547.12 Invoice Date:
```

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Done

start   Eudora - [In]   3 Internet Explorer   Document1 - Microsof...   9:47 AM

Allow the default (Acrobat) to remain selected for a property record. The above is an example of the final format. The tag number is upper left, along with very basic information on the asset. Below the tag number will appear any associated records, in this case, there is an agreement record for this asset, indicating it may have a sponsored agreement attached. (Note: records migrated from the CAMS system may show an agreement for Stanford Unrestricted, which was required in the legacy system, but will no longer be required for Sunflower).

Custodian and location information is in the next set of data, followed by information in the Global User Fields, the Comments, and finally the breakdown of financial components of the asset.

When printing a property record, you may want to select only page two for printout, as the system will otherwise generate a title page, a summary page, and an end page as well as the record.

Screening for Purchase Order Approval

To screen for an asset (which is required for all purchases over $5K within the department, campus-wide for anything over $25K), use the same Inventory Asset (Global Information) report.

Enter your Steward Name (Leave this blank if searching the entire university) and then enter the manufacturer name and model number for the item you are screening.

Note: The criteria entered must match exactly the criteria in the database, so be sure to use the wildcard (%) whenever unsure of the actual spelling or official manufacturer name in the database. For example, here we used "Dell %" instead of just "Dell", as the official name for Dell in the system is "Dell Computers", not "Dell Company" or simply "Dell".

See next page before continuing.
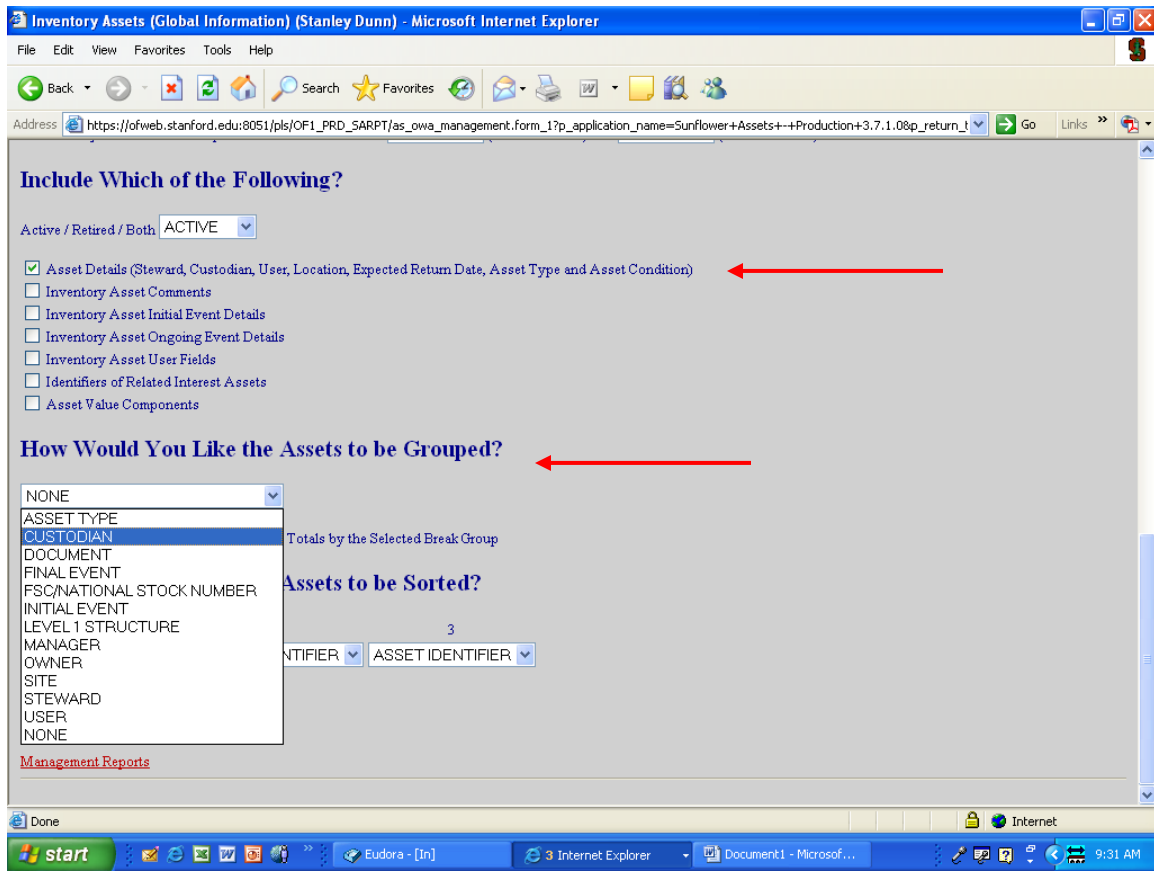
Before submitting the search, check the first box in the series of information groups to be reported. This will give you contact information (Steward and Custodian) for the asset(s) returned in the results.

You may even want to sort the data by custodian or steward, if you expect a large number of items to be in the system.

Then hit enter or click the Submit button at the very bottom of the screen.

You will get a confirmation screen, and in this case, it is recommended you change the output format from "Acrobat" to "Text". (See next page).
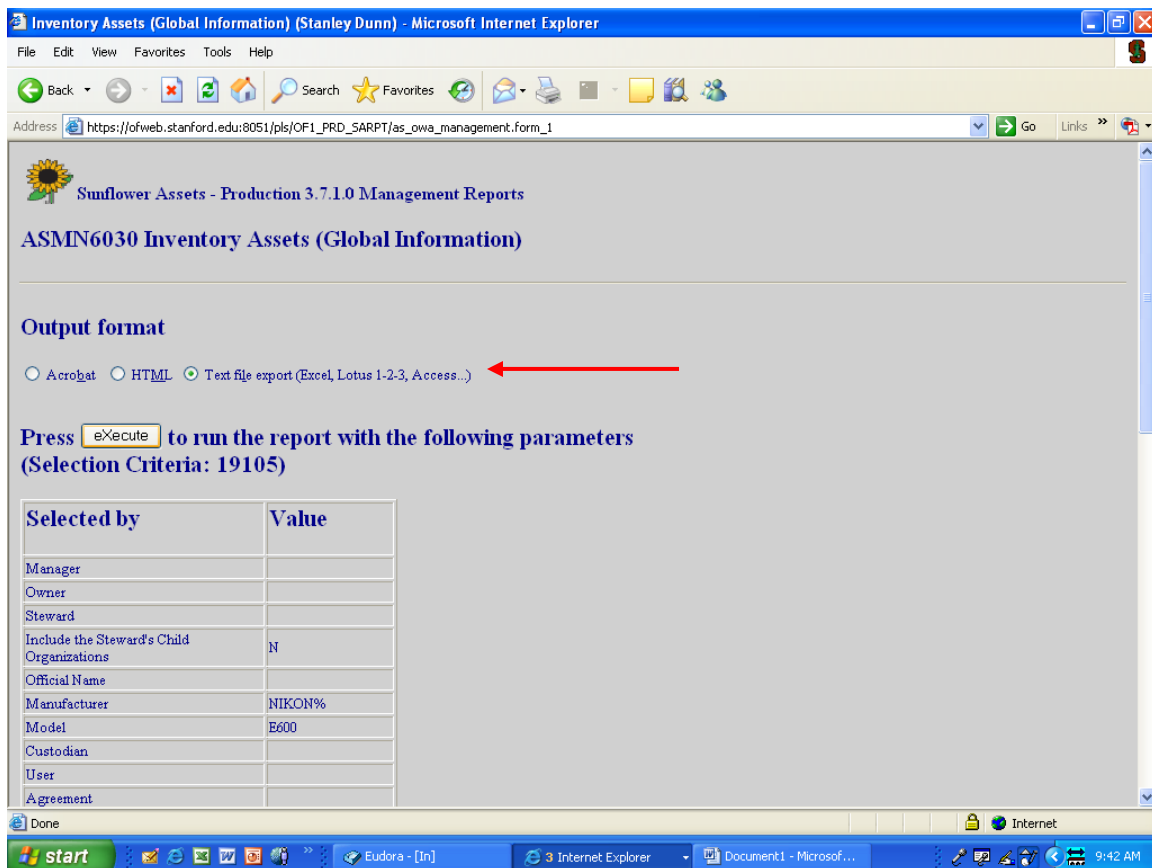
On the confirmation page, select "Text file export" for your results, so you can convert the data into a spreadsheet. This is optional, and depends on how much information you expect from your search. For department-wide searches ($5K - $25K) you may only need an Acrobat output, but for university-wide screenings, in which a large number of assets could be on the results, converting to an Excel format will make finding the contact information for the assets a bit simpler.

If you choose Text file format, see the following section in this manual for converting a text file into an Excel file.
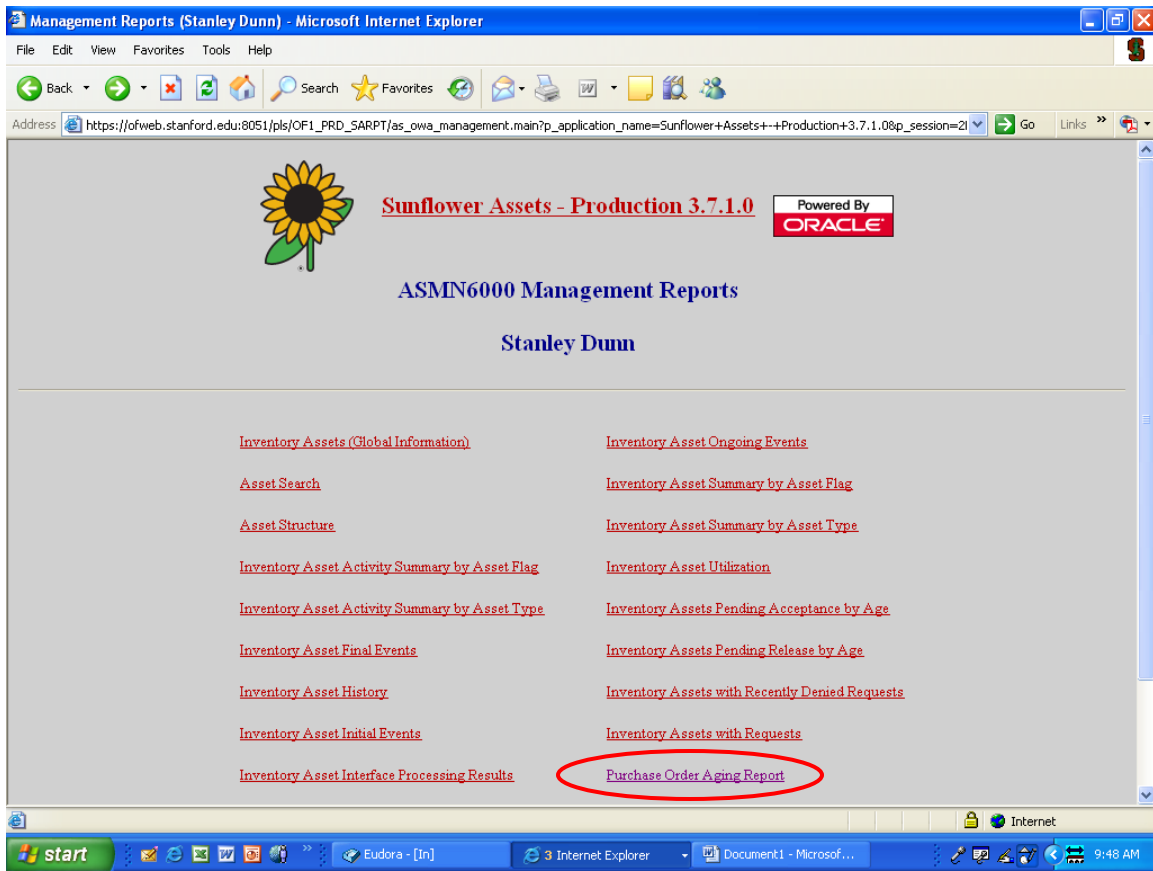
The Purchase Order Aging Report

To see Purchase Orders that have migrated from Internet Procurement into Sunflower, but which have not yet been entered into the records or reconciled, select from the Management Reports menu "Purchase Order Aging Report".

Scroll to the very bottom of the page, and in the very last line of fields (PO Header Attributes), select "Organization" as the Label (this is from the pull-down list of values available for that field.
Then select "=" for the "Operator" (also from the pull-down list of values).
Next, enter your four-alpha org code from the Delphi-assigned code for your steward (if you do not know what this is, contact your PSR)

Note: It is a good idea to flank your org code with the wildcard ("%"), so you capture all POs that involve that org. Some POs use multiple accounts from multiple orgs, and in order to capture those in this report, you must have a percent sign on both sides of the code, or you will only receive data on POs that used ONLY the one org code.

If you have POs that include your org, but do not belong to your department, contact your PSR to ensure the other department handles these in the system.

Sunflower Assets - Production 3.7.1.0 Management Reports

ASPO6010 Purchase Order Aging Report

Output format

○ Acrobat   ○ HTML   ○ Text file export (Excel, Lotus 1-2-3, Access...)

Press [eXecute] to run the report with the following parameters
(Selection Criteria: 19107)

Selected BY	Value
PO Number	
PO Item No.	
PO Item Description	
Display Aging (in days)	
Start From	0
Interval	30
Display Value	QUANTITY ORDERED

Done   Internet

start   Eudora - [In]   3 Internet Explorer   Document1 - Microsof...   9:50 AM

On the confirmation page, unless you receive an error message, simply click the eXecute button to run your report. As with all reports, this will run on the server, leaving your computer free to perform other activities, if the report is large and takes a few minutes to run.

Item No.	Description	Age	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Day
1	POWERBOOK BUNDLE - G4 1GHZ/256MB/40GB/COMBO/RADEON 9000 PRO/AIRPORT/ETHERNET/56K/15.2" TFT + APPLECARE 3YR WARRANTY	109				2	
	Total (PO Items): 1	2				2	

PO Identifier: 10139470
PO SUPPLIER: II COMPUTER CORPORATION__ORGANIZATION: 53120__

Item No.	Description	Age	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Day
1	XI MTOWER 64MP BASE CONFIGURATION	109				2	
2	2X AMD OPTERON 246BIT 1024KB CACHE 2 WAY HYPER TRANSPORT	109				2	
	Total (PO Items): 2	4				4	

PO Identifier: 10141690
PO SUPPLIER: STANFORD BOOKSTORE__ORGANIZATION: 53120__

Item No.	Description	Age	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Day
1	POWERMAC G5 DP 2.0GHZ/512MB/160GB/SUPERDRIVE/RADEON 9600 PRO/GIGABIT/56K	109				6	
2	APPLECARE ENROLLMENT KIT - POWERMAC W/ DISPLAY	109				6	
3	20" APPLE CINEMA DISPLAY	109				6	
	Total (PO Items): 3	18				18	

PO Identifier: 10142950
PO SUPPLIER: XEROX CORPORATION.__ORGANIZATION: 53120__

Above is a sample of a PO report. Each PO will be listed numerically, including the line items for each. To the right will be the number of days the PO has remained in the interface without being reconciled. These are broken down into 30-day periods.

Remember, a PO will appear on this report until the actual assets have been reconciled by PMO and a corresponding financial record created in Oracle Fixed Assets. This action creates a "Verified" record in Sunflower, and the PO then drops out of the interface and no longer appears on this report.

If you believe a PO is on this report in error, contact your PSR.

Other Reports

You may occasionally be asked by department staff or Faculty to run special reports based on Steward, Location, Custodian, other criteria or a combination of these attributes. In the Inventory Assets (Global Information) report, you can enter as many or as few criteria as you want, depending on the desired results. In the above example, only a custodian name has been entered. This will result in a list of all assets for which this individual is listed on the record as the custodian, regardless of steward, location, or any other attribute.

If your custodian has assets in multiple stewards (faculty often have multiple appointments to more than one department), you may want to enter the Steward name desired, depending on whether you want only the assets in one steward, or all assets assigned to that custodian.

Perhaps you need a report on all assets in a room prior to packing it up for storage (i.e. during a lab or office remodel). In that case, you may want to run a report like the one shown above, listing only the room in question in the search criteria.

Always confirm the results of such a report by physically verifying the assets in a location. The data in the Sunflower system is only as accurate as the information input. Assets tend to move about, not always with notification to the DPA, so double-checking is a must in many cases. (Another good reason to try to keep the most accurate up-to-date records possible).

We have now seen several of the most common reports needed by Department Property Administrators. Given the wide variability of the search criteria, there are obviously many permutations for reporting data. Any combination of search criteria may be used. Any that are not needed, simply leave them blank. If you have an unusual request and are uncertain how to configure the criteria in order to get the appropriate results, call your PSR for additional guidance.

There are two reports used in conjunction with Excess Requests that we will look at in the next few pages.
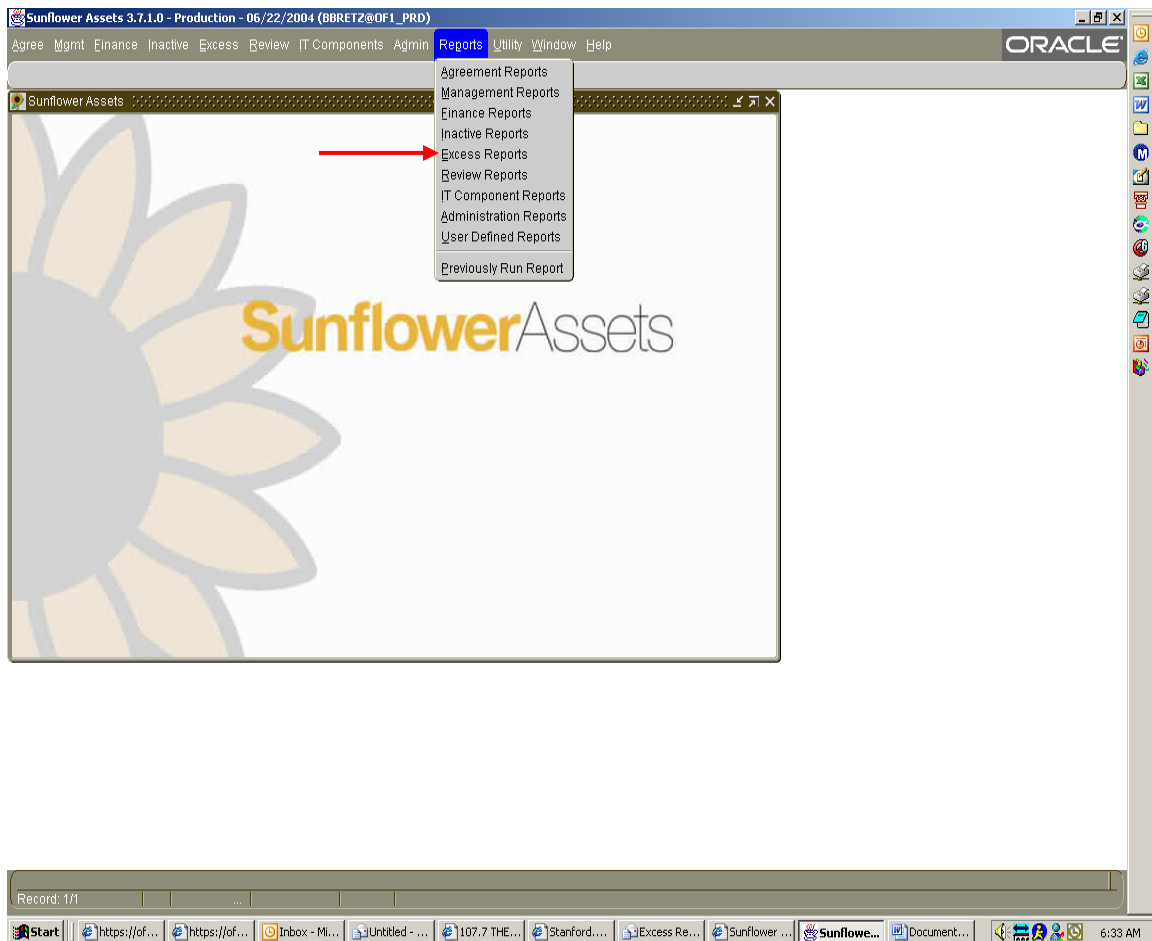
THE EXCESS RECEIVAL FORM

To print a copy of your excess request, either for filing or for affixing to the asset being excessed (this is highly recommended to facilitate scrap pickups), use the Excess Reports module.
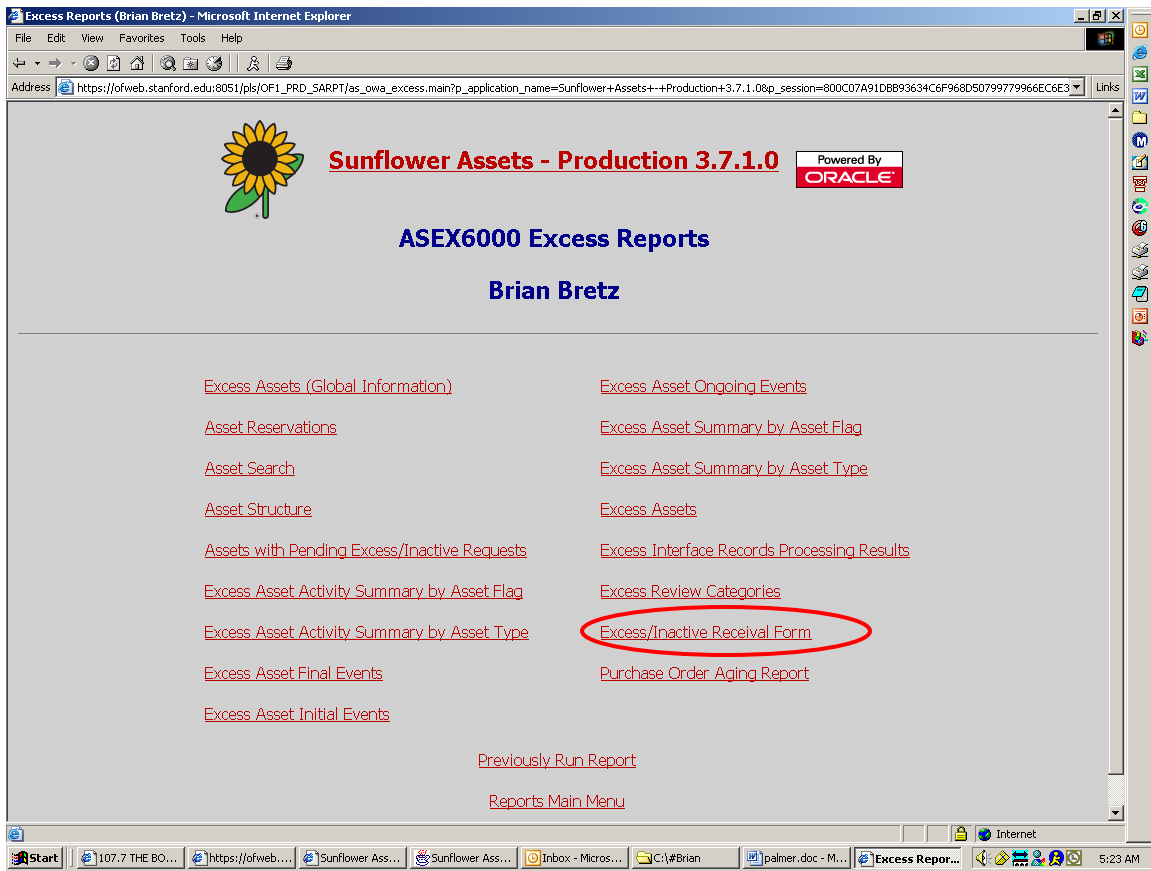
Select "Excess/Inactive Receival Form" from the menu.

Note: This is the only selection that includes the word "Form", so it is easy to remember.

You have an option of how to call up the form(s) you want. If you are only printing one or two, you can simply enter the request number of each form to print (only one request number at a time, you will need to repeat this action for each form).

If you have several forms to print, or you do not know the excess request number for your form, you can bring up all of the excess requests you have generated by leaving the request number field blank, and instead enter your name in the "Requester" field. Then hit enter, or scroll all the way to the bottom of the screen and click the Submit button.
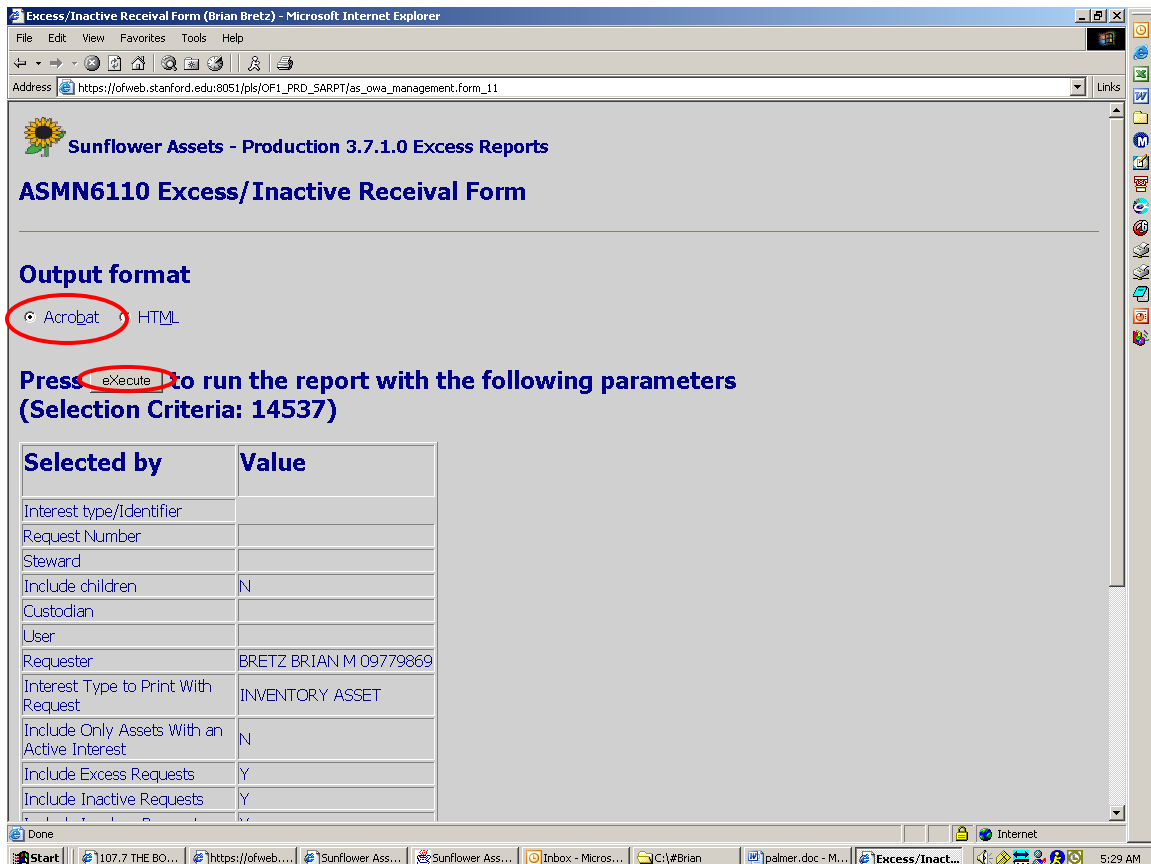
You will get a confirmation screen, which allows you to double-check that you have requested the correct forms – this screen will also alert you if there were any errors in the search criteria you used (i.e. if you misspelled your name, or the request number you entered does not exist)

This screen defaults to the output for the form to be in Acrobat. That is the only viable choice, so leave that selection checked. (HTML is not activated in Sunflower at this time).

Options

REPORT SELECTION CRITERIA

```
Sunflower Assets                        Excess Receival Form
ASMN6110                                                        07/13/2004 05:39

    7255

    [barcode]

        Request : 7255
        Requester : BRETZ BRIAN M 09779869              Phone :
        Date : 06/04/2004                      Alternate  Phone :
    Identifier : INV 0406659
    Manufacturer : SAVIN CORPORATION            Model :9940DP
    Official Name : COPIER                      Asset Type :DATA HANDLING
        Quantity :              Unit of Measure :
    Description :
        Serial No : 2A37830546        Value :  $    11,344.27    Acquisition Date :08/18/1997
        Flags : C
        Manager : HUMANITIES AND SCIENCES        Owner : STANFORD UNIVERSITY
        Steward : LINGUISTICS                     Rep : MENDOZA NATALIE M 09988262
        Custodian : MENDOZA NATALIE M 09988262    Phone : 650-725-2587
                                              Alternate Phone :

        Condition : POOR CONDITION

    Pick-up Location                          Deliver-to Location
    MAIN QUADRANGLE                           STERN
    BUILDING : 460   ROOM : 127               BUILDING : 040   ROOM : 122
    01


    Comment : Suggested Disposal Method:  TRADE-UP
           Contact name/phone:Natalie- 5-2587
           EH&S or ITSS Sanitization Certification (Y/N):
           New Purchase Requisition Number: Q11272
           Value (Credit) of Trade-in: 250.00
           New Asset SUID Number: 3264825
    CUT & PASTE TEMPLATE FROM DPA UPDATE PAGE
```

8 x 10.5 in

7 of 19

Done   Internet

This is an example of what your form will look like on the screen. The form includes the request number (and a barcode of that number). All of the information relative to the asset and excess request also populates in the form, such as pickup location, deliver-to location (remember, this is an important piece of information), and the comment template with the contact name and number, as well as the basic data for the asset. If the asset has a barcode tag, this will also appear at the very bottom of the report, both the barcode and the asset ID number.
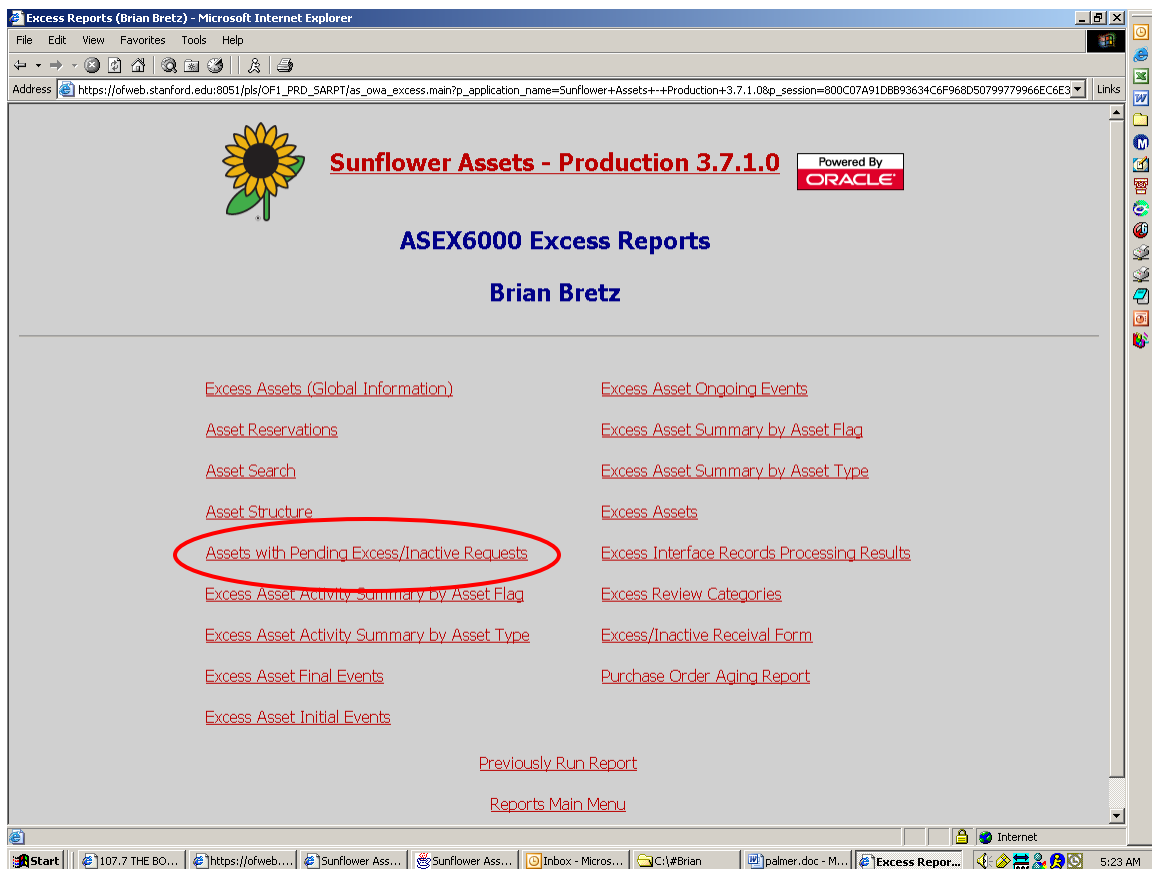
Occasionally, you may wish to see all of your outstanding excess requests.
To get such a report, go to the Excess Reports menu, and select "Assets with
Pending Excess/Inactive Receival Requests".

This time, enter either your Steward name, or your name. Then follow the same steps as before to get a list of all assets with outstanding excess requests.

It could be a good idea to run this report from time to time, so as to ensure that no assets have been overlooked, either in the scrap disposal process, or in the financial reconciliation process (for trade-ups, returns, transfers, etc).