SUNFLOWER USER GUIDE

Instruction for Creating Records through the PO Interface

For use with Stanford property only
Section 2

Creating Records Through the PO Interface
From the Mgmt pull-down menu, select the choice “Process Inventory Asset PO Interface Records”.
To make the screens more user-friendly, it is recommended that you maximize the size of the active window. To do this, click on the box shape in the upper right corner of the active screen.

There are three symbols here, a “minus sign”, a “box”, and an “X”. Click on the one that looks like a box.
Now, use your mouse to place the cursor on the dark “title bar” of the Allocation screen. Holding the mouse button you can drag the screen to the right, into the blank area, so both screens are fully visible.

These last few steps have been optional, but most people find it much easier to work with the data when all of the information is fully visible.
The next step is to enter the PO number in the PO field. Then hit the ‘enter’ or ‘tab’ key on your keyboard.

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

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

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

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

Hint: When you first click the flashlight icon, the titles of the fields may disappear. This is OK, just hit tab twice to place the cursor in the correct field.
Highlight the line you wish to include in the asset record you are creating, and click on the small “ > ” button at the bottom of the screen. Repeat this action for each line you wish to include in the asset record.

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

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

Hint: If your asset involves multiple POs, make sure all of the POs are in the PO Interface before you begin the process.
This is the Asset Information screen, where you will input the physical information about the asset. In the background, all of the lines you have allocated for this record are “rolled together” financially into this single record.

Enter the SUID tag number (the last seven digits of the barcode tag) in the “Tag Needed” field. When completed hit the ‘tab’ key.
After entering the tag number, do not enter the manufacturer name. Instead, skip that field, and go directly to the “Model Number” field. Enter the first 2 or 3 characters of the model number and then double click on the field. A list of choices will pop up, which includes all model numbers in the database that begin with those characters. This list is arranged alphabetically by manufacturer name. These combinations are referred to as “catalog items”.

Note: Occasionally, a manufacturer may be in the system with two different spellings, so beginning by selecting the 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: The identifier type field is where you can enter ‘taggable’ or untaggable’. Fields highlighted in yellow are mandatory.
In this example, the first two characters of the model number are “XE”. When that is entered in the field, and we double-click, we get a list of all model numbers that begin with XE. Simply scroll down the list, highlight the manufacturer/model/description you want, then click the OK button.

Note: If the model number you need is not on the list, and you’ve verified that the number is correct, please visit SPARC.stanford.edu and submit a request to have the new model number added to the database. This is a real-time entry, and the selection will be immediately available for you to use.
Notice that all of the fields that pertain to the make and model automatically populate in the appropriate fields.

Continue to the next page, to see information on serial number entry.
When entering the serial number, please omit any spaces, dashes, or other non-alphanumeric characters. This will facilitate searches based on serial numbers in the future.

If there is no serial number, please leave the field blank – do not enter “none”, “NA”, “NV”, or any other entry of that sort. If you do, subsequent entries using the same model combination could run into difficulty, as the system will not permit catalog items with identical serial numbers.
Use the tab key to move through the next field, and allow “effective date” to default to the date you are entering the record. The acquisition date should be the date the item was physically received (or installation completed, if being installed by the vendor).

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

The next field is the “Flags” field, which is very important, as this tells the system whether or not your asset is capital, and triggers the beginning of depreciation. 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.

- **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 PSR if you think this may be the case.

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

Tip: You can navigate between the fields simply by hitting the down or up arrow on your keyboard.
Once all of the fields are populated with Y or N, you must SAVE the data by clicking on the blue save icon in the upper left corner.
Notice that the Flags field has populated with the corresponding first letter of each box marked with a ‘Y’.

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

Next, enter the appropriate Manager, Owner, and Steward, based on your department and the ownership of the asset. Contact your UPA 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 Rep field.
The next field to complete is the Custodian field. The Custodian is the person who has control over the asset’s use and movement – usually a PI or Administrative Manager.

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

Note: The first field in the Custodian line is the employee ID number. Skip that field and go to the field for the custodian’s last name.
From the list that appears, highlight the name of the custodian and click the OK button. All of the custodian fields will populate accordingly, as shown on the next page.
User should be completed the same way as the custodian field. If the user is not a Stanford employee, or is a group of people, leave this field blank – there is an additional space for entering free-form user names.

Location is an important and required field. To enter a location, you must first double-click on the field, and a pop-up multi-part field will appear.
The multi-part location screen consists of 5 fields. “Quad” is where you enter the Quad number. Double-click on this field for the list of quads. Highlight the quad you want and click OK. There is a quad name/number conversion chart available on the DPA website if needed.

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

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

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

Tip: If you already know the Quad, Bldg-Floor and room combination you can enter the numbers and hit tab to move quickly through each field.
Once all of the location fields are completed, be sure to SAVE the data by clicking on the blue save icon in the upper left corner.
Notice the information entered in the location screen populates as a string of data in the main record. By placing the cursor in this field, you can scroll left and right to view the data in the string.

You are ALMOST done.
Next click on the “Additional Details” tab at the top of the page.
When the new tab opens, look for the “Global User Fields” towards the bottom and double click inside the box.

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

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

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

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

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