Welcome to Sunflower Training!

The following training is designed to enable you to learn how to access information about capital assets in the Sunflower Assets system. It is suggested that you print this training manual and then perform the easy to follow instructions of the Step-By-Step method.

How to Login to Sunflower

Before you can use the Sunflower Assets system, you have to log into the system. The following information will describe how to locate Sunflower and log into the system.
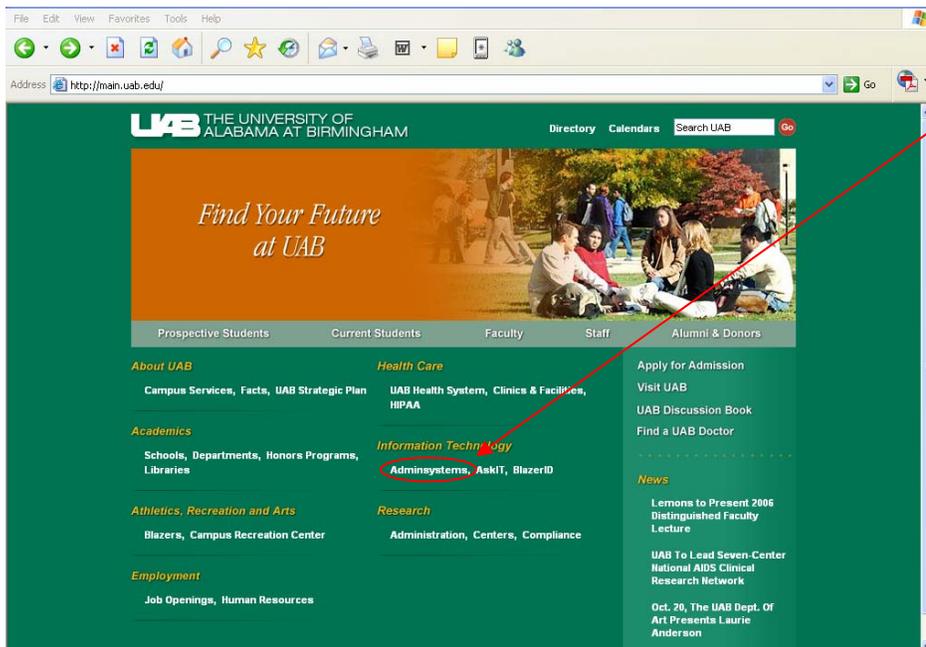
Start at the UAB Main Web page. Then, **click** on the AdminSystems link beneath Information Technology.
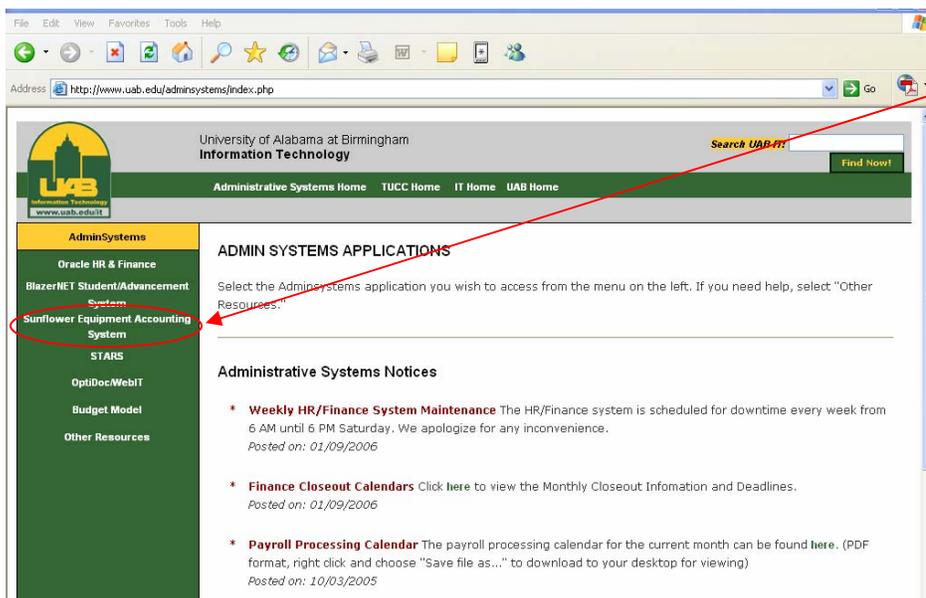
In the AdminSystems page, **click** on the Sunflower Equipment Accounting System link in the left margin.

Sunflower Training (Step-By-Step)
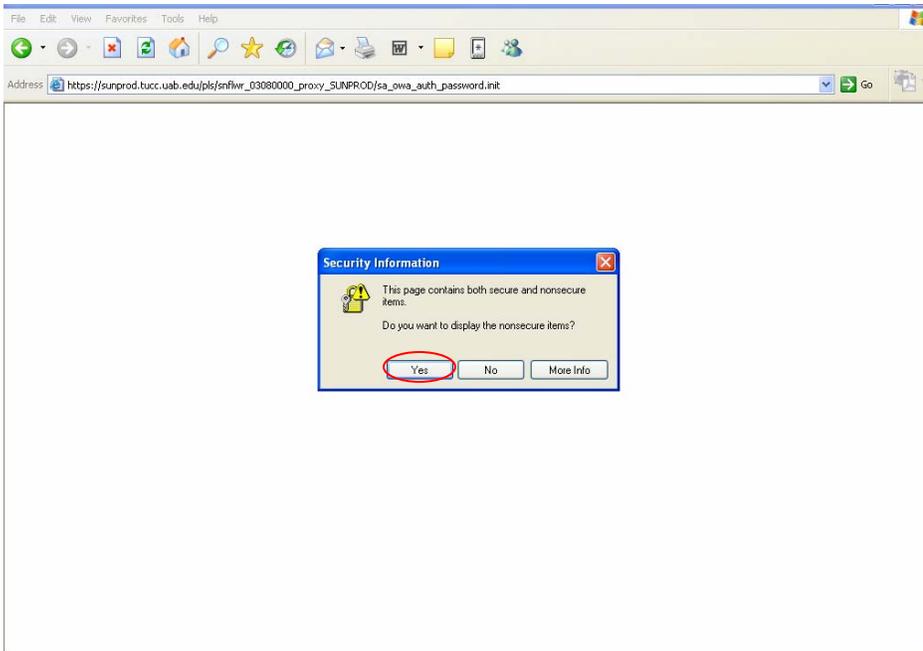
A Security Information window will pop up. Just **click** Yes to proceed.
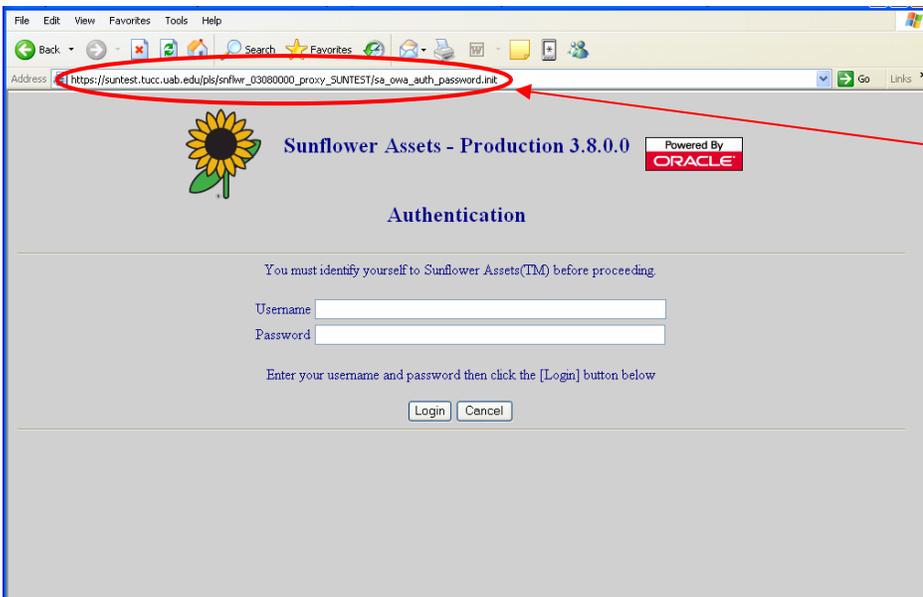
Sunflower actually resides on the internet at this address: **https://sunprod.tucc.uab.edu/pls/snflwr_03080000_proxy_SUNPROD/sa_owa_menu.** If needed, simply type this address into the browser and press Enter. You may also add this page to your **Favorites**.

This is the Authentication screen where you login to Sunflower Assets.

The link is: https://sunprod.tucc.uab.edu/pls/snflwr_03080000_proxy_SUNPROD/sa_owa_menu

Sunflower Training (Step-By-Step)

Type your Blazer ID in the Username field and your "strong" password in the Password field. <u>Note</u>: You do not have to use the CAPS key in the Username field. Sunflower automatically capitalizes your username. Then, **click** on the Login button.
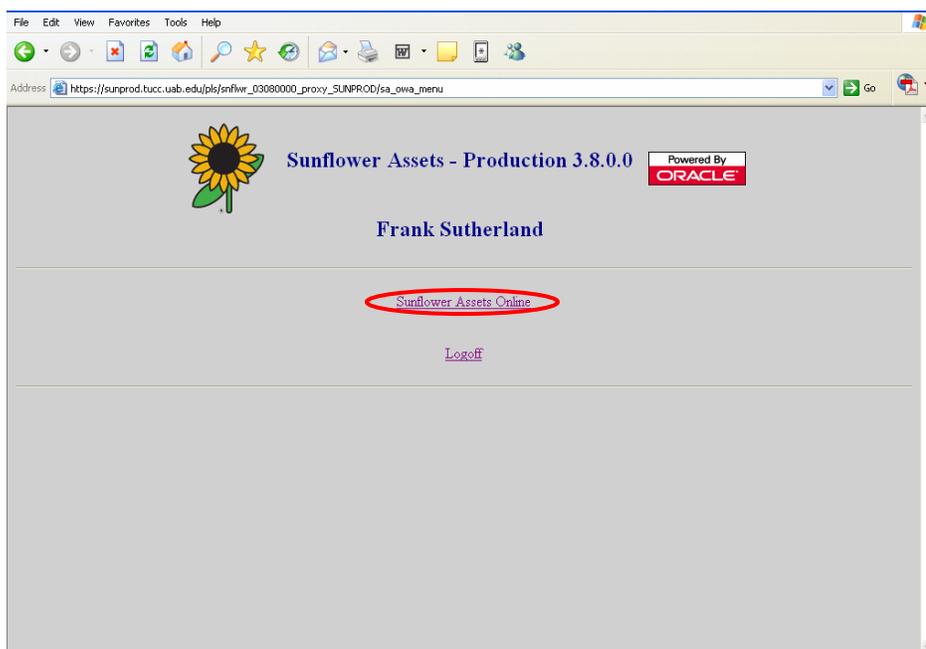
Now, to access Sunflower, simply **click** on the Sunflower Assets Online link.

So, What Am I Looking At?

This is the Main "splash" screen of the Sunflower Assets system that you see after you login.

In the Menu bar, you will see various modules. The only module that end-users will find most useful is **Mgmt**.
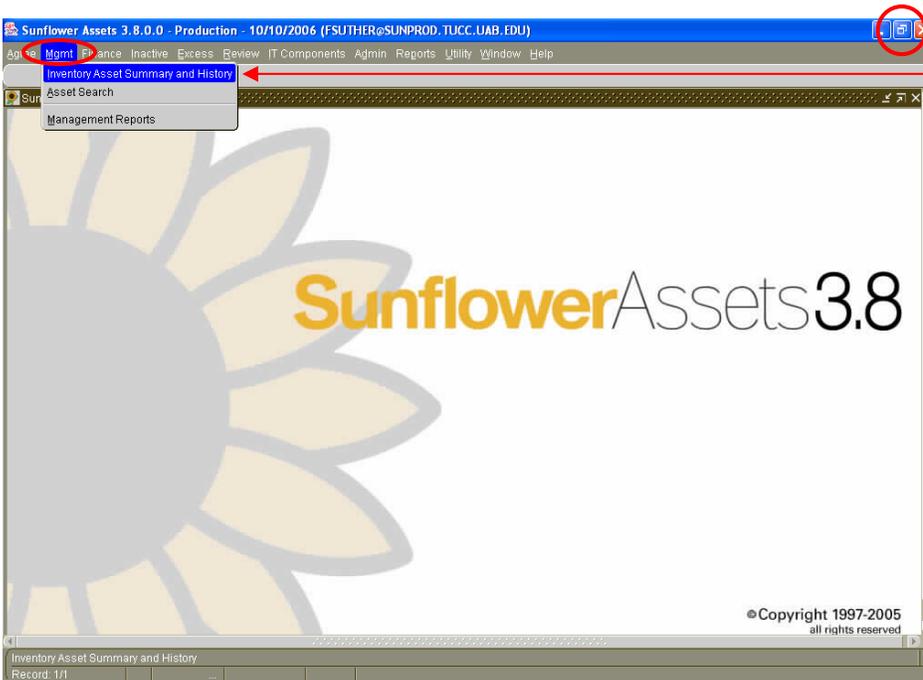
First, **click** on the Maximize button to enlarge the screen. The purpose of maximizing this screen is so that you can reference information in the bottom Status bar. **Click** on Mgmt in the Menu and **select** Inventory Asset Summary and History.

Sunflower Training (Step-By-Step)

There are a number of elements to become familiar with on a Sunflower screen. Here is the Inventory Asset Summary and History screen which is the first selection under Mgmt in the drop-down Menu. Look at the areas pointed out on the screen.
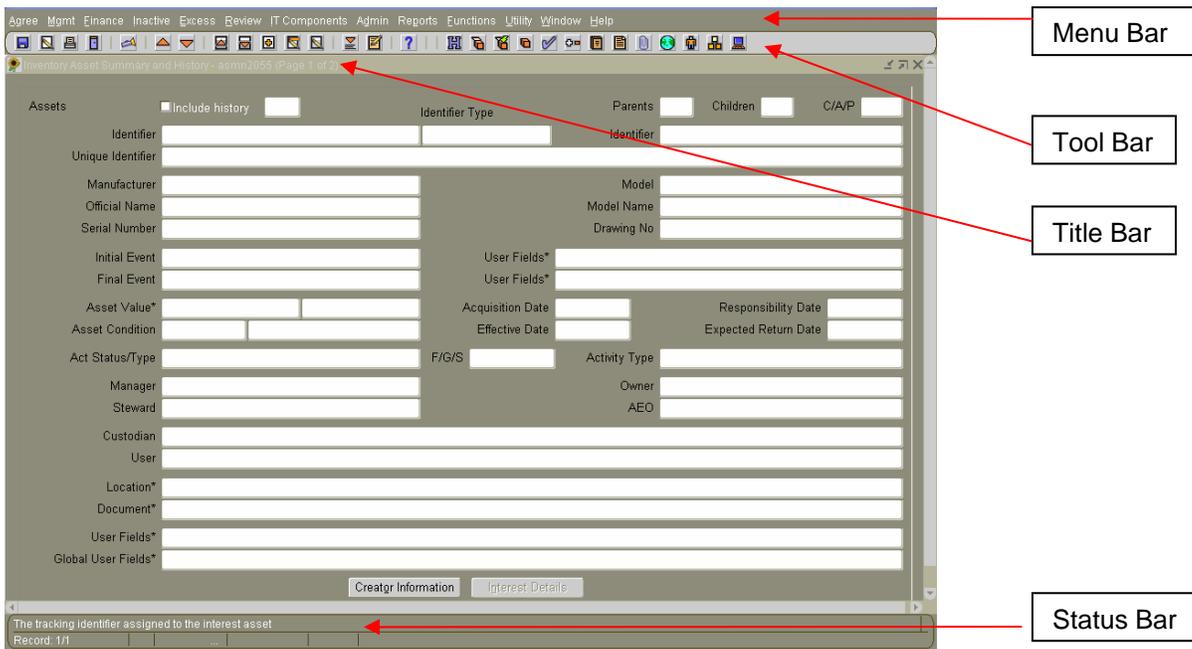
The Menu Bar is a pull-down list of options used to navigate to other screens. To select, simply click on the menu option.

When you place your curser on any of the buttons on the **Tool Bar**, a "*Tool Tip*" will appear to give you information about the button's function. See example below:

Here is a complete listing of Tool Bar buttons and descriptions.

Tool Bar buttons

Print Screen   Prints the current screen to your default printer.

Clear All   Clears information from the current form, effectively leaving you with a new one. This is particularly useful when you need to exit the current information on the screen and start a new query or input new information.

Find   Creates a new query if you are in standard mode. Executes a query if you are in query mode (indicated by "Enter Query" at the bottom of the screen).

Remove Record   Deletes the current record.

Clear Record   Clears the current record and undoes any changes you have made to that record.

Summary & History   Opens the Asset Summary and History screen record and displays the event that closed this interest asset.

Resolution Lookup   Opens the Lookup Asset Resolutions screen for the current record.

Comment/Picture/Attachment   Opens the Comments, Picture and Attachments screen, enabling you to view any comments, pictures and attachments supporting the current record.

Location   Opens Maintain Locations screen enabling you to view the location for the current record.

Click into the Identifier field and input an existing asset number. Then **press** the Tab key. (It is suggested that you navigate around the fields with the Tab key instead of the Enter key.) The asset fields will then populate.

Title Bar

Status

The **Title Bar** indicates the name of the form (window) along with context information related to the form, such as the page number, etc.

The **Status Bar** displays any status information related to the asset record. Also works in conjunction with the "Tool Tips" bubble to provide icon or button information.

Sunflower Training (Step-By-Step)

Now, let's look at the fields of an actual asset record. **Type** 399877 in the Identifier field.

1. The **Identifier** is the unique asset ID or property tag number of the asset. Typically, this is the asset tag number unless the asset is untaggable.

2. The **Manufacturer** is undoubtedly, the manufacturer of this equipment.

3. The **Model** is a concatenation of the manufacturer's model name and the official name that has been attributed to this equipment.

4. The **Official Name** is the name by which the equipment will be referred to here at UAB.

5. The **Serial Number** is the unique identifier that the manufacturer has assigned to this equipment.

6. The **Initial Event** field identifies the event that precipitated creation or reactivation of the asset.

7. The **Asset Value** is the capitalized value of the equipment.

8. The **Acquisition Date** and **Responsibility Date** The Acquisition Date is the invoice date and the responsibility date generally defaults to the Acquisition Date.

9. The **Effective Date** is the "as of" date of the asset record.

10. **The Activity Status/Type** is the status indicator of the asset; for example, IN SERVICE means the asset has been located in inventory and TEMPORARILY MISPLACED means the asset has not been found in inventory.

11. The **F/G/S** field provides three flags indicating whether the equipment is Federally titled (F), Government furnished (G), or grant Sensitive (S). Y means Yes and N means No.

12. **UAB is the owner of all capital equipment!**

13. The **Manager** field indicates whether the asset is part of the HOSPITAL or the UNIVERSITY asset inventory.

14. The **Steward** field identifies the specific organization that has responsibility for the equipment. The data displays the steward org number and organization name concatenated.

15. The **AEO** field displays the Accountable Equipment Officer for the steward organization.

16. The **User** field identifies a specific individual who has been approved to take UAB equipment at off campus, usually to their home.

17. The **Location** field identifies the physical location of the equipment.

18. The **Global User Fields** field identifies additional information about an asset, such as service center affiliation, vehicle license number, etc.

Sunflower Training (Step-By-Step)

There are a few additional concepts about how information is displayed in the Sunflower screens that will be helpful to understand. Here they are:

User Defined Fields (UDFs) – These fields contain unique information about an asset specific to the requirements of the Equipment Accounting Department and UAB.

The Asset Value field is a User Defined Field. **Double-click** in this field.

Specific information about the Asset Value will appear. The upper form indicates the Asset Value type and Asset Value. The lower form indicates the cost records for the asset.

Sunflower Training (Step-By-Step)

To view the specific information about a cost record **double-click** in the record under User Fields*.

Specific information will appear. Considerable detail about the actual purchase is noted.

To close this form, **click** on the X in the upper right corner of the form.

Note: XCONV will be displayed in some fields and denotes that this information was not present in the legacy system EAS, but was required upon conversion. Similarly, the date information of 01/01/1900 was used to populate required date fields upon conversion; however the data was not required in EAS.

Sunflower Training (Step-By-Step)

To close these forms, **click** on the X in the upper right corner of the top form.

Additional User Defined Fields are: **Location** and **Global User Fields**.

Another example of an UDF is the Location field. It provides specific location information about the asset. **Double-click** in the Location field.

The Location window opens. This is where the specific location information is input for the asset record. To close a UDF, simply **click** on the X button.

Sunflower Training (Step-By-Step)

The information that ultimately appears in the asset record is concatenated from several fields on the location screen.

Double-click in the Global User Field to view additional asset information.

The information in the Global User Field reveals where the property tag is placed upon the asset. In addition, if an asset has been purchased by a grant, that will be shown. Also, if the asset is a vehicle, then specific relevant information will be indicated.

Note: When an Equipment Disposition Form (EDF) is submitted for an asset, the EDF number and date will be indicated here. As a subsequent EDFs are submitted, the previous EDF number and date will be overwritten.

Additional Sunflower Concepts: Initial Event, Ongoing Event, and Final Event

When an asset record is created in Sunflower, an Initial Event is recorded. This event recognizes the method by which the asset is "created" in the system.

Note: The Initial Event for most assets in Sunflower will be "CREATE CAPITAL ITEM." The Initial Event "CONVERTED CAPITAL ITEM FROM EAS" indicates that the asset existed in the earlier EAS system and was converted to Sunflower effective 12/31/2006.

There are only two possible Ongoing Events for an asset. The asset can be transferred from the University to the Hospital or transferred from the Hospital to the University.

There can be a Final Event for an asset. This event recognizes the final disposition or "retirement" of the asset from a physical and financial accountability perspective. Proper disposal of an asset is subject to regulations.

Additional Sunflower Concepts: Summary and History
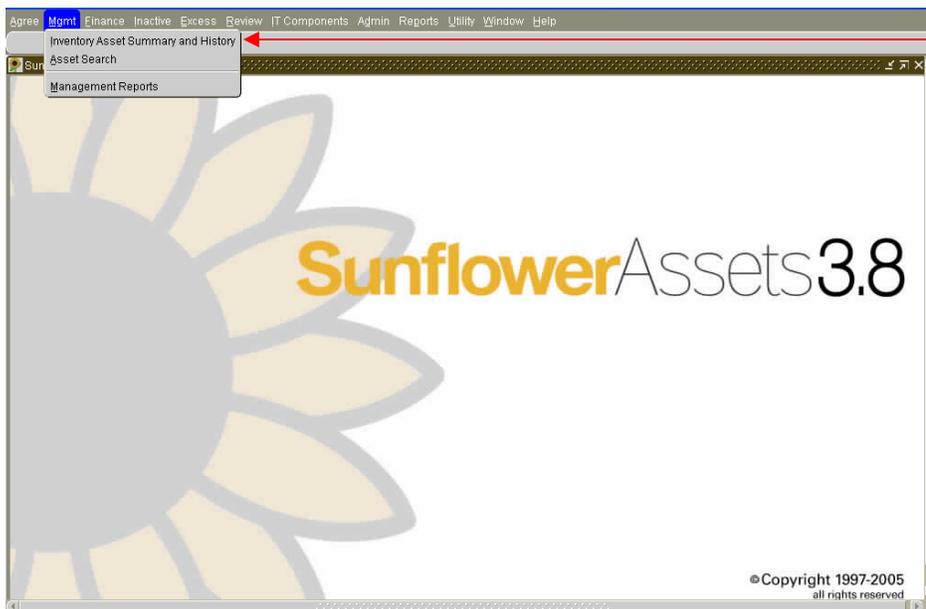
To look up or research a specific asset, **click** on Mgmt in the Menu, then **select** Inventory Asset Summary and History. Please note that these are the only options available for users.
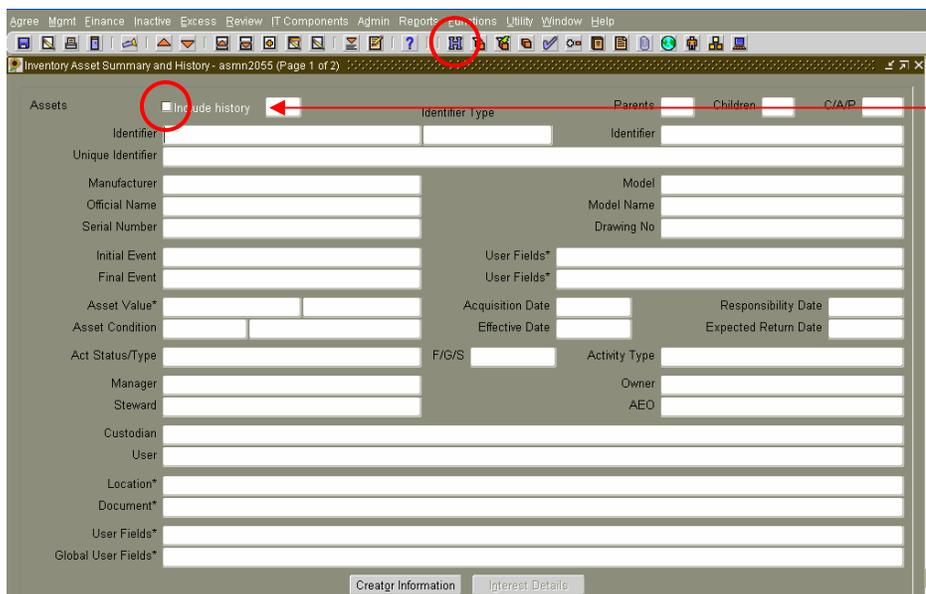
The Inventory Asset Summary and History screen appears. **Click** in the Include History box to place a check in it.

Sunflower Training (Step-By-Step)

Type the asset number in the Identifier field. Then **press** the Tab key.

The asset record will appear. Notice the **v** in the field to the right of Include history. This field indicates that there are historical records available to view. When the **v** is indicated, this means that you are viewing the latest record for the asset and there are additional records "previous" to the current record. The sequence of the records will be indicated in the Effective Date field. To view the history for this asset, **press** the down arrow key on the keyboard.

Note: To view "historical" records-
 v - **Press** the down arrow key to view previous records
 ∧v - **Press** the up or down arrow key to view previous or later records
 ∧ – **Press** the up arrow key to look at later records

Sunflower Training (Step-By-Step)

The field now indicates that there is a history record **∧v** before and after the current record. You can **press** either the up or down arrow keys to view these records.

Additional Sunflower Concepts: Asset Resolutions

The physical resolution of an asset is recorded for the most recent physical inventory or "Review Campaign." For example, following a physical inventory conducted by the Equipment Accounting Department, a specific asset is not found. The Not Found Inventory Report is mailed to the steward org's AEO identifying any equipment that was not found during the physical inventory. Subsequently, when the AEO discovers the equipment and reports that the equipment is in a different location, the asset resolution is updated by EAD. This completes the resolution of the asset related to that review campaign. Additional events can happen to the asset and they would be recorded as well, such as: transfer to another location via EDF, change steward org via EDF, or sent to Surplus via EDF.

In this example of an inventory asset resolution, **Exhibit A** indicates that as of Effective Date 10/20/2006, Asset # 381771 has an Activity Status of In Service and was located On Campus in Room 6338 of North Pavilion.

However, in a previous record of the asset shown in **Exhibit B**, the asset's Activity Status was Temporarily Misplaced and the location shown was Room J725 in Jefferson Tower on the Effective Date of 09/26/2006.

Sunflower Training (Step-By-Step)

In the original asset record shown in **Exhibit C**, as of 12/31/2005, this asset was indicated to be In Service in Room J725 in Jefferson Tower.

The three history records for the asset showed it to be In Service, then Temporarily Misplaced and then In Service again in another location.

To verify the latest resolution for an asset, **click** on the Resolution button.

The AEO returned the inventory report indicating the new location. The Asset Resolution screen shown in **Exhibit D** indicates that the record was updated on 10/20/2006 by Jesse Rudolph. The type of resolution is Online Physical which means that EAD received a notification from the org declaring that they had located the asset.

Note: By **clicking** on this scroll bar, you can view prior inventory resolutions for this asset.

Sunflower Training (Step-By-Step)

These are examples of resolutions that will be recorded for an asset.

Additional Sunflower Concepts: Comments

Another feature within Sunflower is the ability to view Comments about an asset. Simply **click** on the button with the "paper clip" icon. This is the Comment/ Picture/Attachment button in the Toolbar to view the comments about an asset during its life cycle.

The Comment form will appear listing comments, from the latest to the earliest, about the asset.

Accessing Asset Information – Finding the Asset

A query function exists in Sunflower to enable a user to access asset records without knowing the specific asset identifier. This "look up" feature works on the basis of retrieving all assets by a specified Steward Org, Custodian, Manufacturer, Model, or even by Serial Number. Once you have retrieved the records, you can scroll through them until you find the record you are looking for. The following "look up" scenarios will describe how to utilize this query function.

From an asset record screen, **click** on the flashlight button in the tool bar.

Accessing Asset Information by Steward Org

The Query Criteria screen appears. **Click** in the Steward field. When the three dots appear (the "ellipsis"), **click** on this button. An LOV will appears providing a listing from which you make your selection.

The LOV for any field contributes to the integrity of the data that is entered for each asset record. For example: When you click on the ellipsis in the Steward Org field…

Just **click** on the ellipsis (…)

The LOV opens, showing all the Steward Orgs at UAB to which assets are affiliated. **Select** the appropriate name in the Steward list of values. Then, **click** OK.

<u>Note</u>: If a steward org does not have any capital assets affiliated with it, it will not appear in this LOV.

Sunflower Training (Step-By-Step)

Click on the Execute button to begin the search for assets for the selected Steward Org.

The Maintain Inventory Assets screen reappears. Several asset records specific to the selected Steward Org may be viewed from this screen.

To view these asset records, simply **press** the down-arrow key on the keyboard to view all asset records.

Accessing Asset Information by Manufacturer

In the Query Criteria screen, **click** into the Manufacturer field. When the three dots appear (the "ellipsis"), **click** on this button. A list of values will appear.

Select one of the names in the Manufacturer list of values.
Then, **click** OK.

Sunflower Training (Step-By-Step)

Now, **click** on the Execute button to begin the search for assets.

The fields of the Maintain Inventory Assets screen will populate with all asset records specific to the Manufacturer which was selected.

To view other assets for this Manufacturer, **press** the down-arrow key on the keyboard to see additional asset records.

Notice that the total number of assets, specific to the Manufacturer, is shown in the Status Bar.

Note: Be aware that selecting a manufacturer such as "DELL" will return a large amount of asset records. It may be helpful to limit the search by specifying two criteria – a selected steward org and a manufacturer.

Accessing Asset Information by Model

In the Query Criteria screen, **click** into the Model field.

Type in the specific Model number that you are looking for. (The model number must be exact.)

Click on the Execute button.

Sunflower Training (Step-By-Step)

The fields of the Maintain Inventory Assets screen will populate with all asset records specific to the Model which was input.

To view other assets for this Model, **press** the down-arrow key on the keyboard to see additional asset records.

Notice that the total number of assets, specific to the Model, is shown in the Status Bar.

Accessing Asset Information by Serial Number

In the Query Criteria screen, **click** into the Serial Number field.

Sunflower Training (Step-By-Step)

Type in the specific Serial Number that you are looking for. Then **click** on the Execute button to begin the query.

<u>Note</u>: If the complete serial number is known, you may input it. However, if only a portion of the serial number is known, you may include the wildcard character, "%" before or following the input. The "%" will represent any and all characters of the serial number that proceed or follow what was input. The "%" may be used in any field where the complete data is not known.

The Maintain Inventory Assets screen will appear with the data specific to the Serial Number which was input.

Sunflower Training (Step-By-Step)

> Reminder: The Query Criteria can be very useful for querying all fields except the User Defined Fields (UDF).

Logging Out of Sunflower

Closing the Sunflower instance that you're working in is relatively easy. The following training will show you how to log out of Sunflower.

> You can exit and log out of Sunflower from any screen.

Sunflower Training (Step-By-Step)
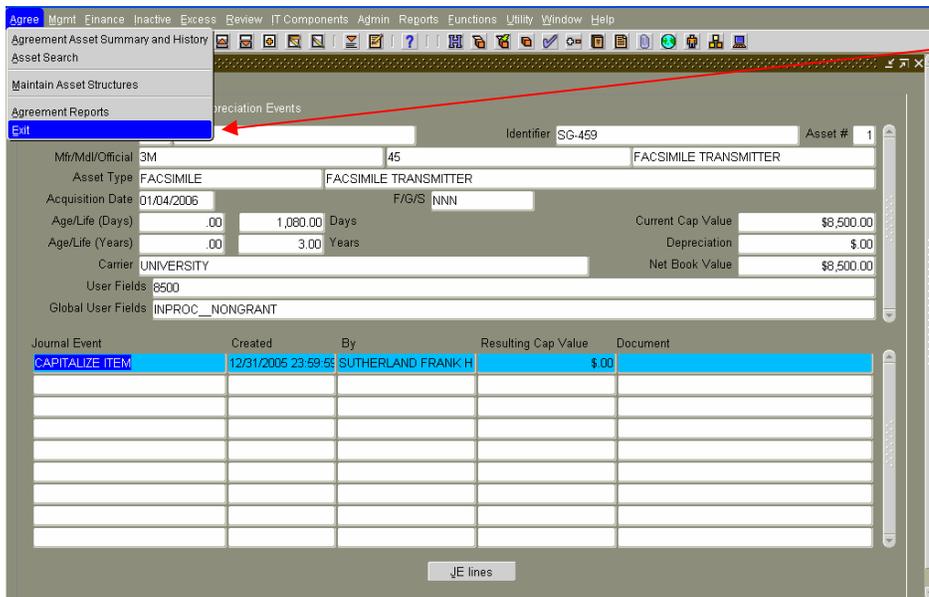
Click on Agree in the Menu and then **select** Exit.
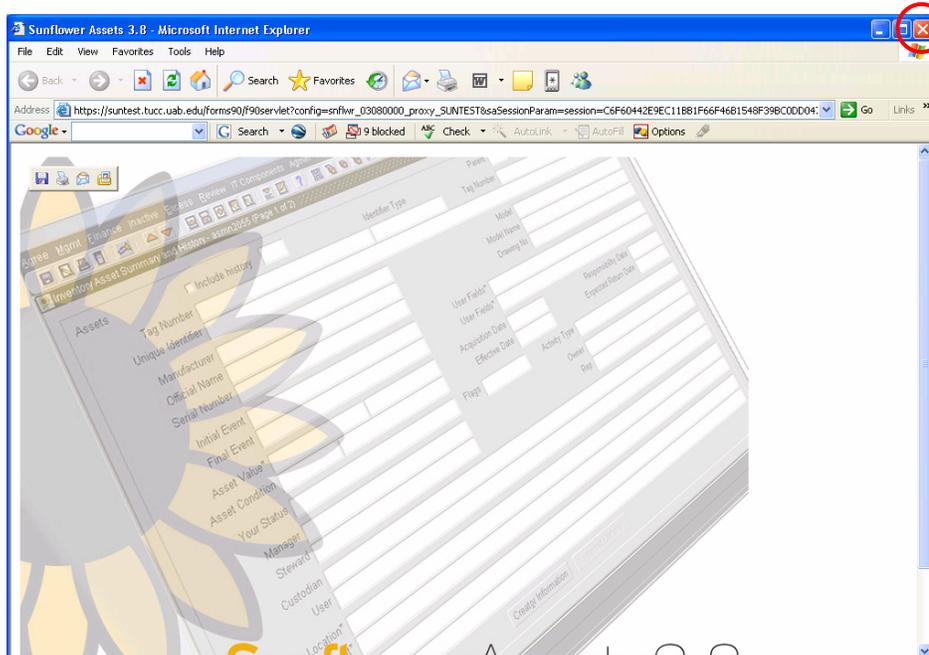
Initially, the screen that you were in closes. Then **click** on the X in the upper right corner.

Sunflower Training (Step-By-Step)

Now, **click** on Logoff.
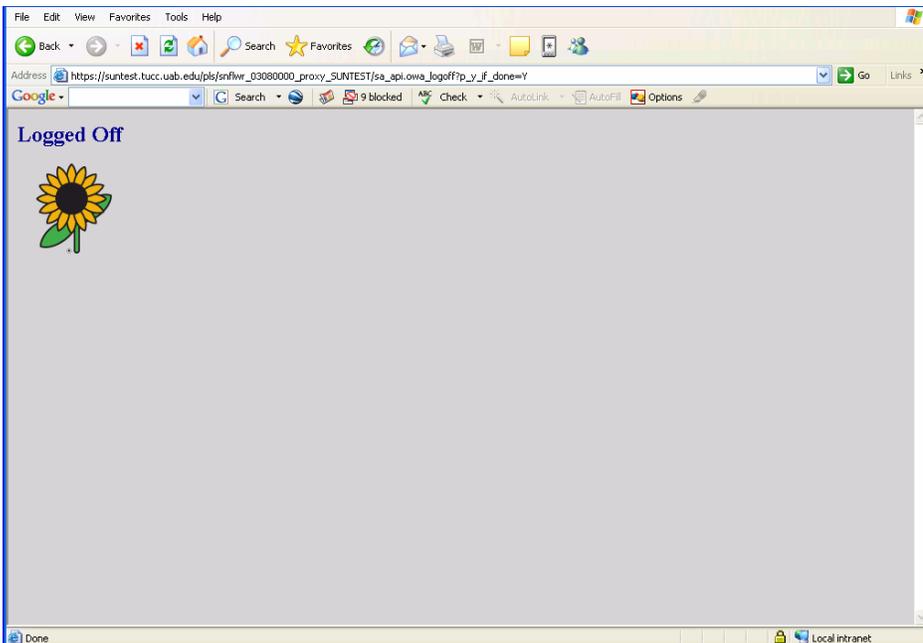
This screen confirms that you have logged off from the Sunflower System.