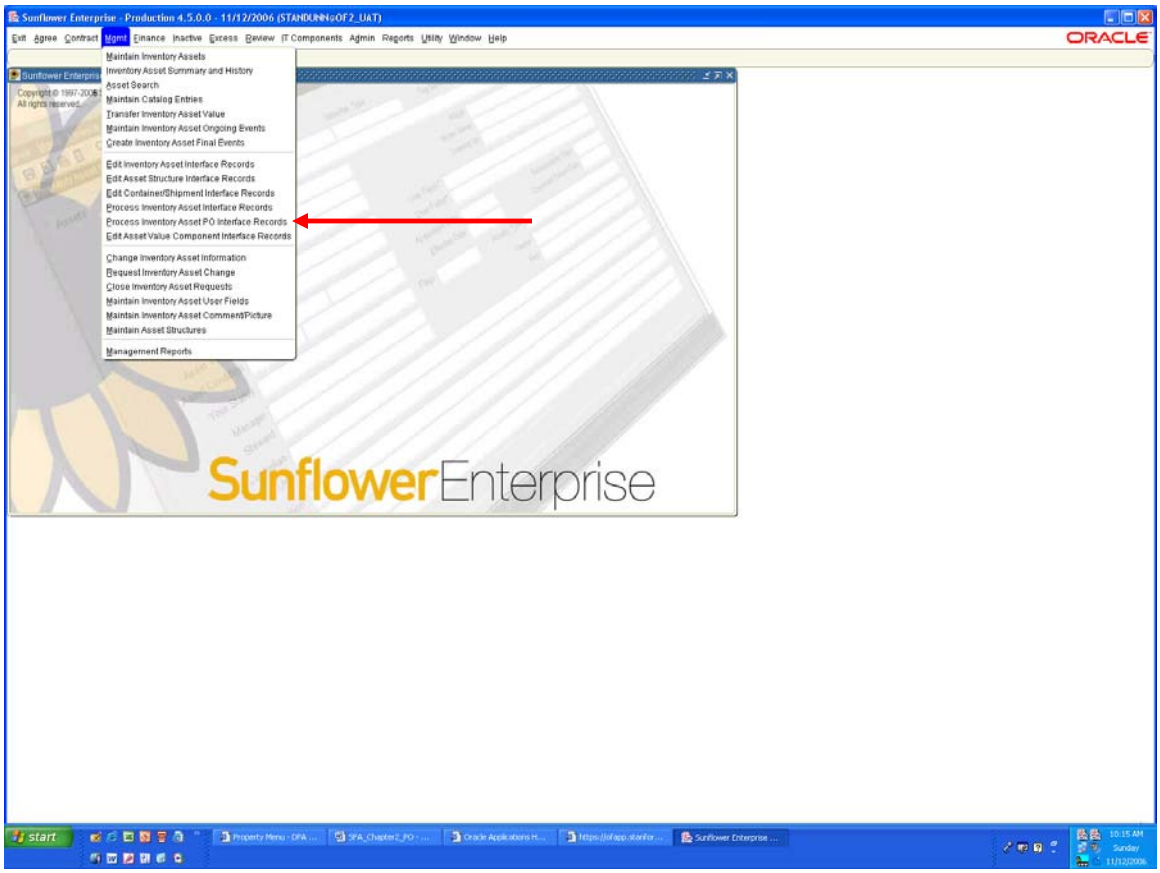
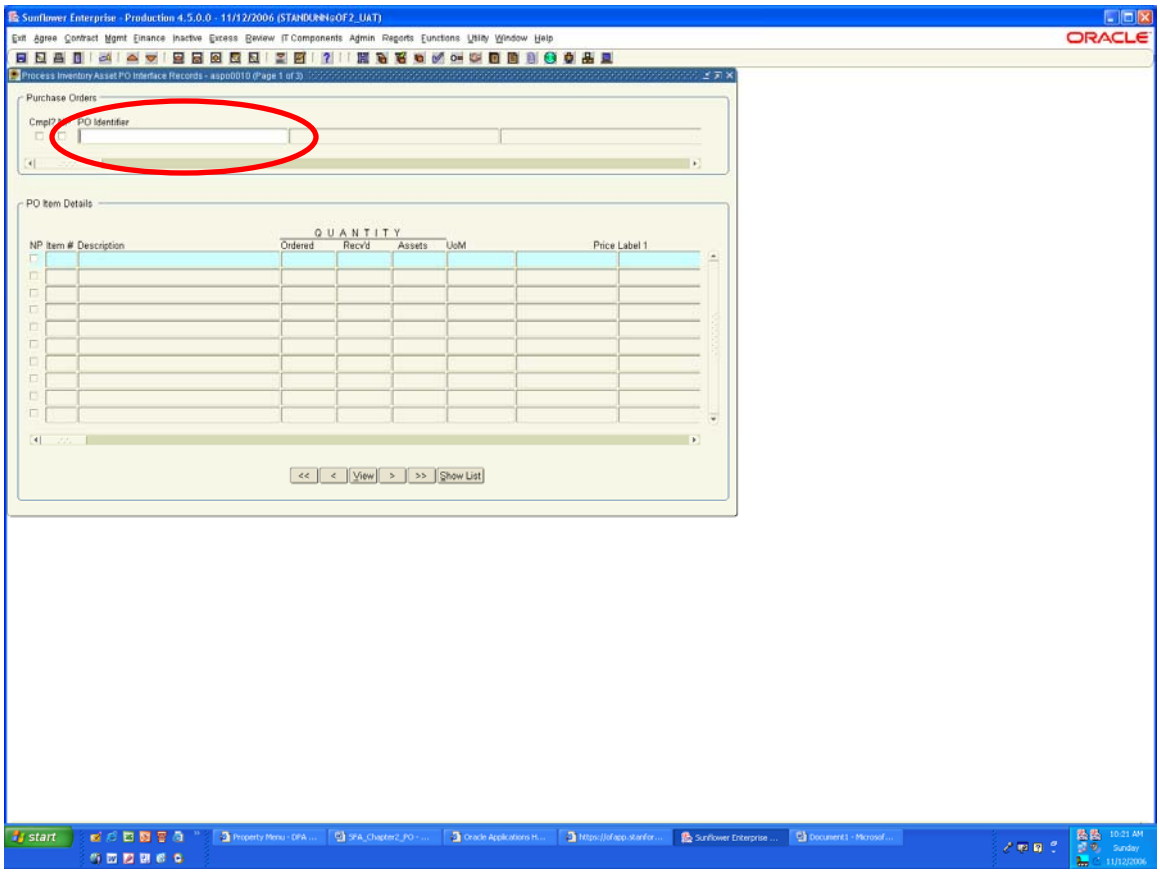
Section 2

Creating Records Through the PO Interface

Sunflower User's Guide



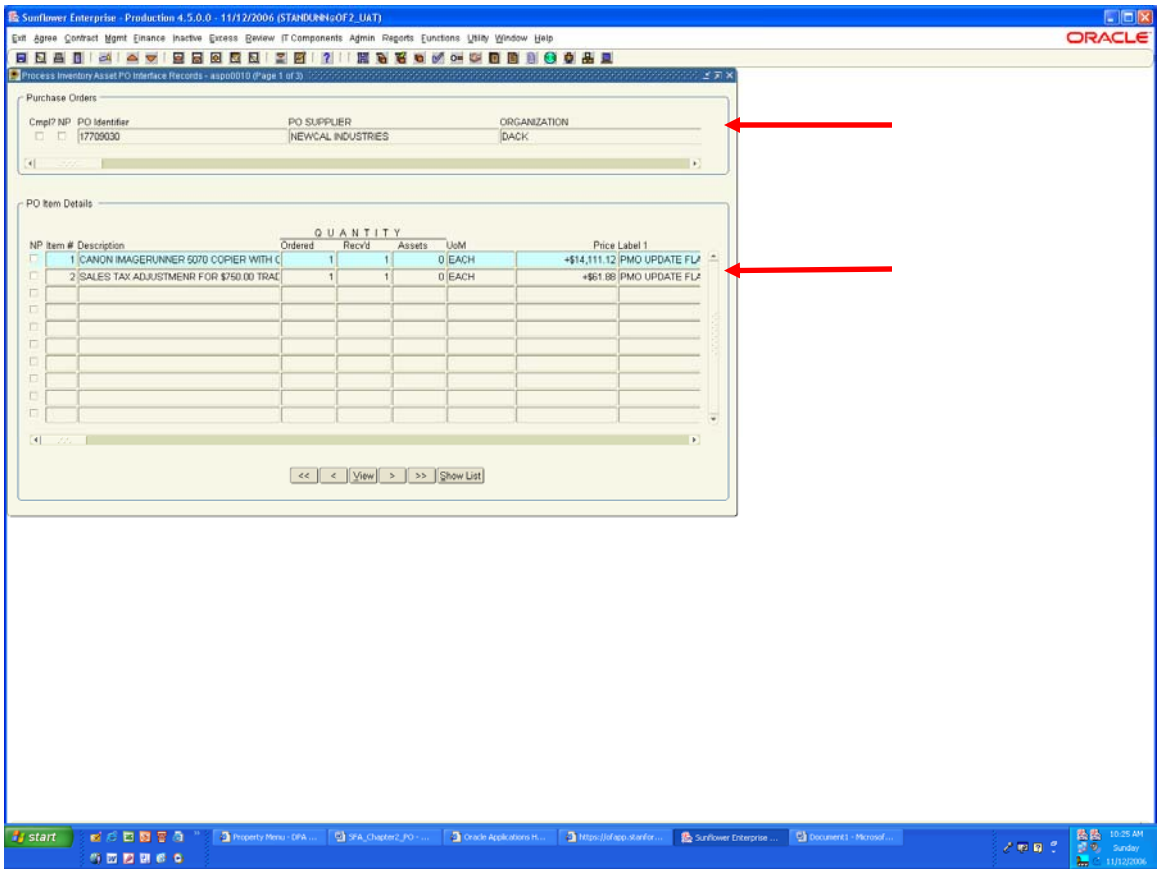
From the Mgmt pull-down menu, select the choice “Process Inventory Asset PO Interface Records”.



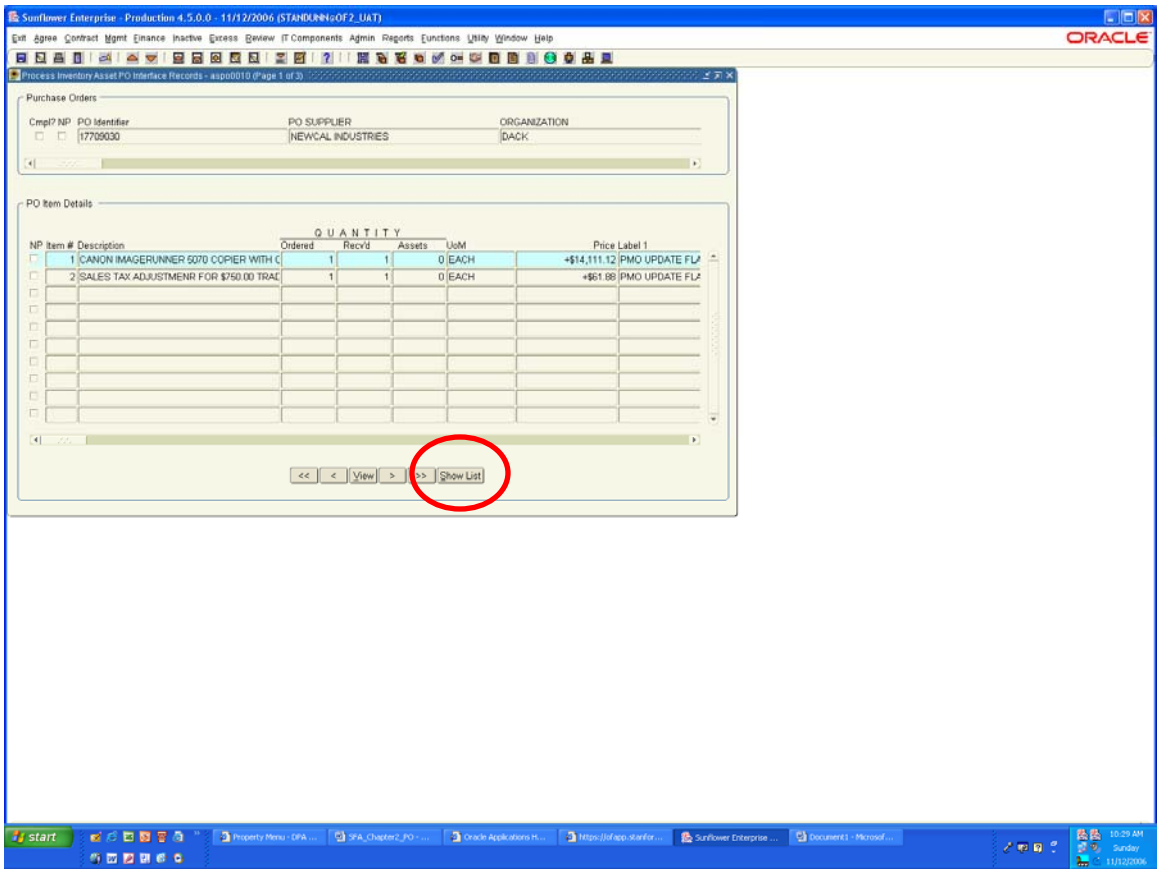
Enter the PO number (don't forget the additional digit added to a requisition number – usually a zero) in the PO field. Then hit the Enter key on your keyboard.

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"

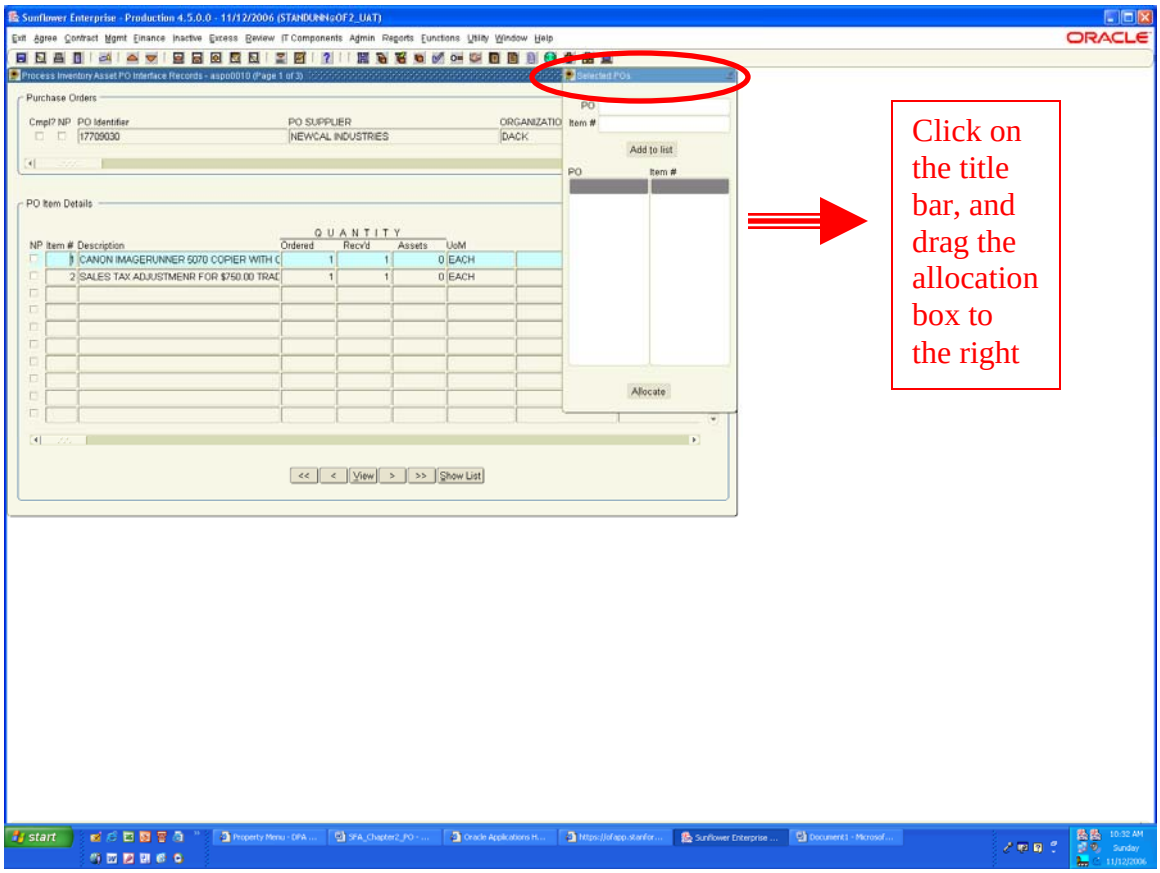
Note: It takes an overnight process in Oracle Financials for a PO to migrate into Sunflower after it has been received in the iProcurement system.



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.

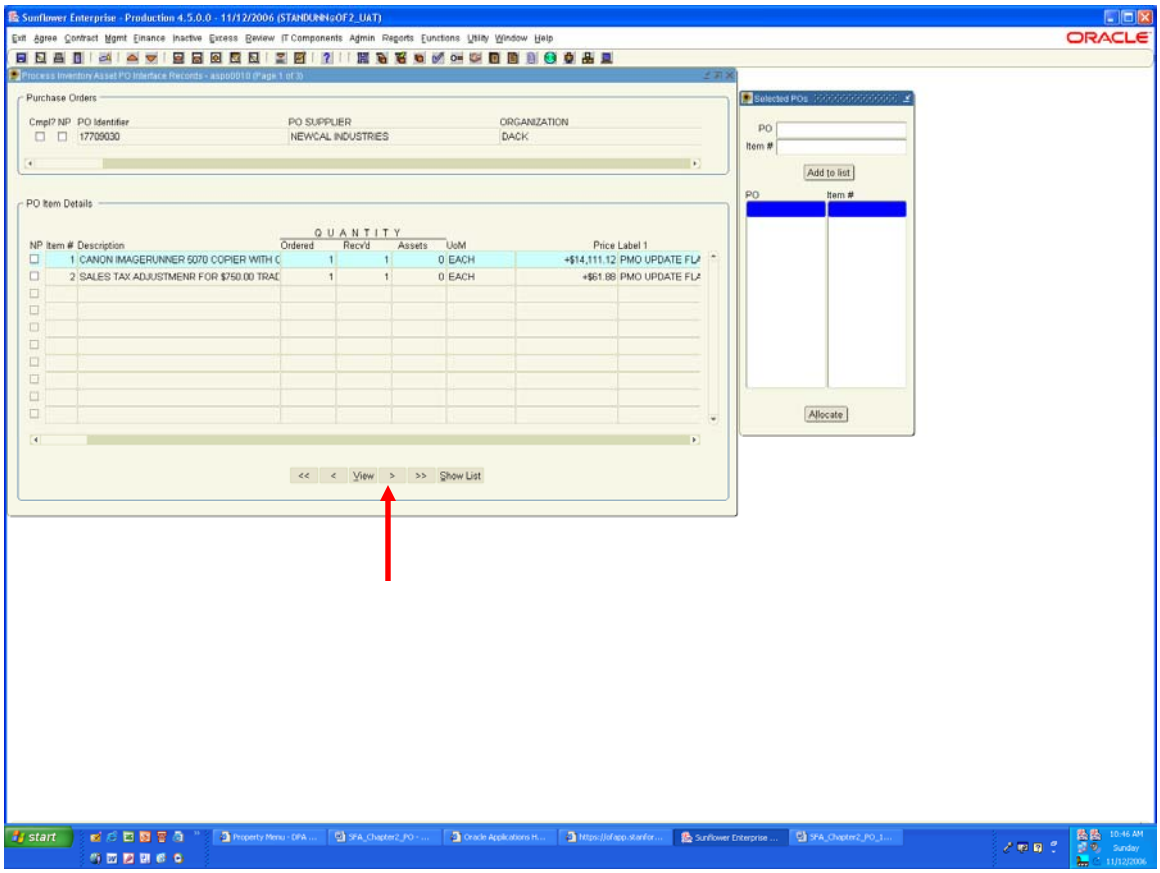


In order to see the lines you are selecting for allocation into the asset record, click on the “Show List” button at lower right. This will open the “Allocation Screen” (see next page)

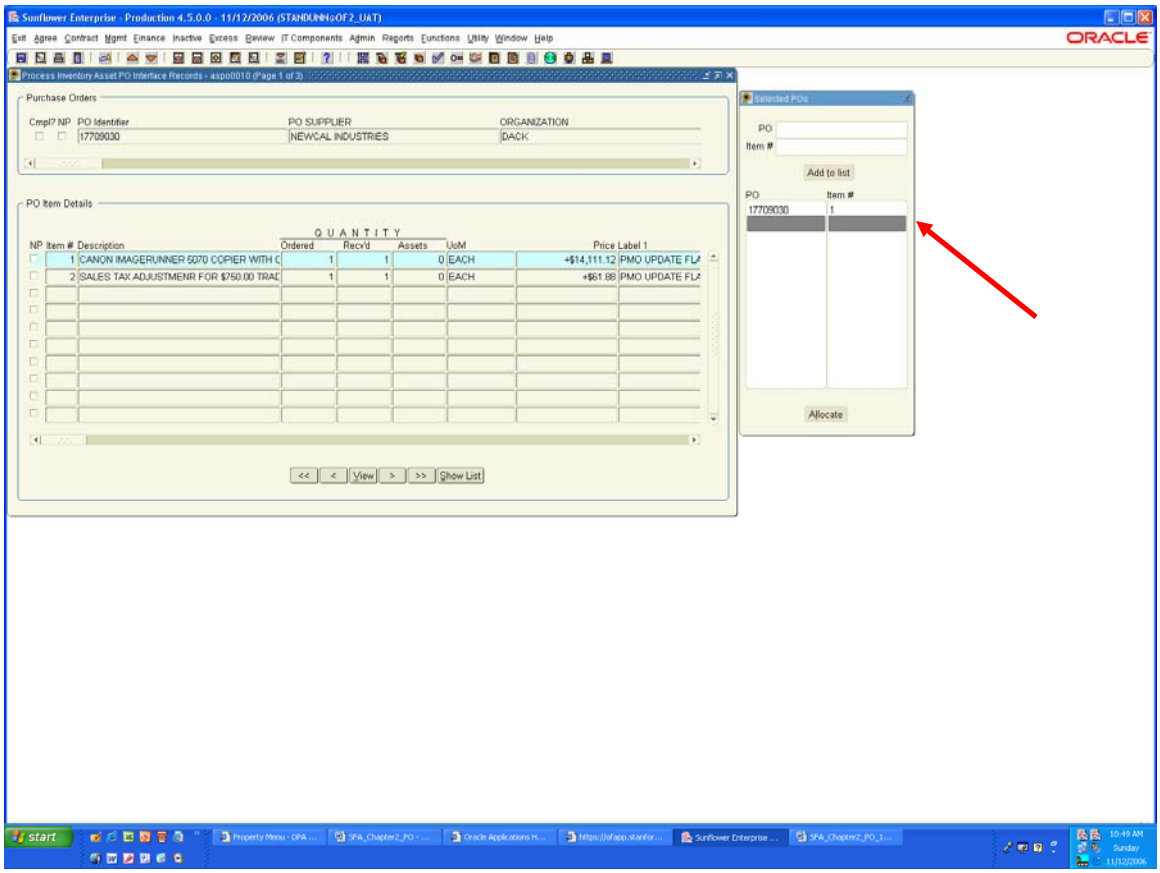


If desired, click (and hold) on the title bar of the allocation box, and drag it to the right of the screen, in order to see all data at once. This may require maximizing the active window (by clicking on the box symbol in the upper right hand corner)

This is not a required step, of course, but it helps if one wishes to have a clear view of all data in the interface.



Now highlight the line you want to incorporate into the asset, and click on the right arrow button (>). In the above example, we are selecting line one.

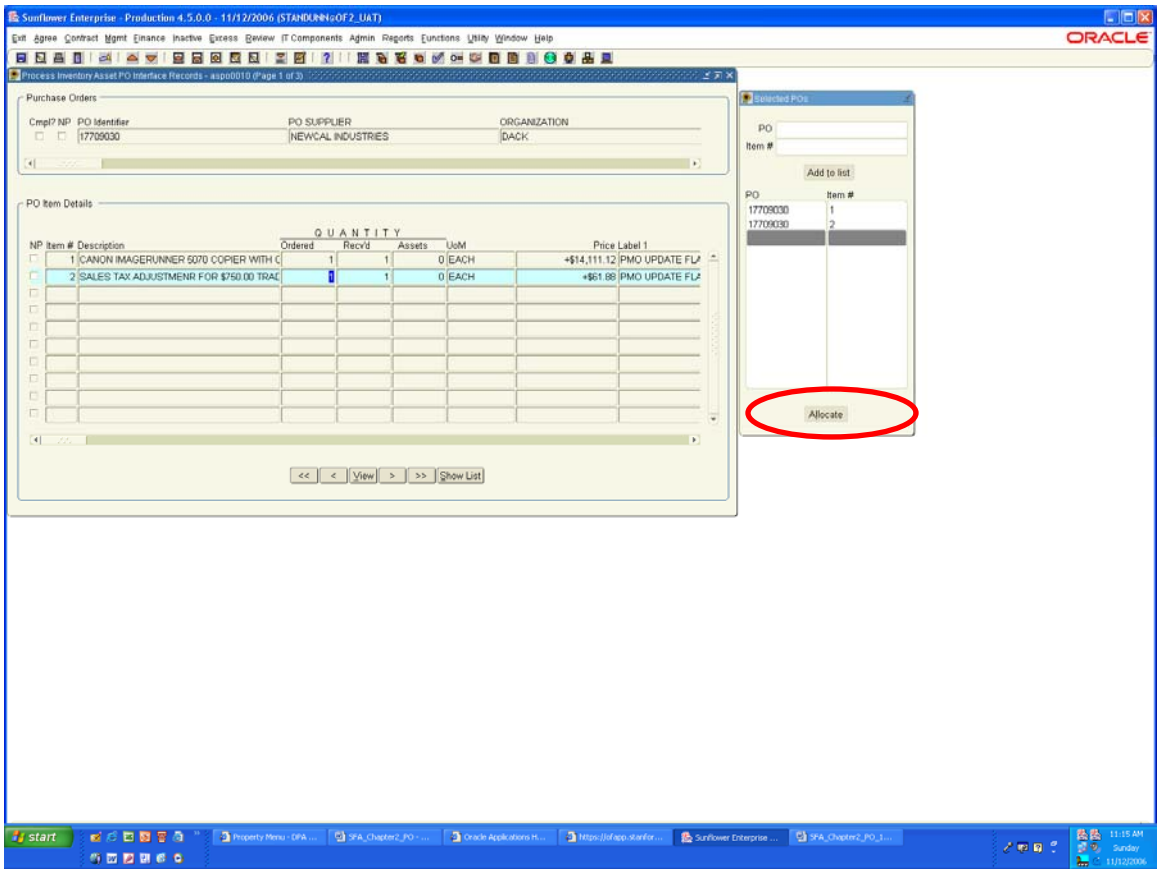


Notice that the Allocation box now contains the PO number and line number selected. You can now select the next line you want to include in the asset.

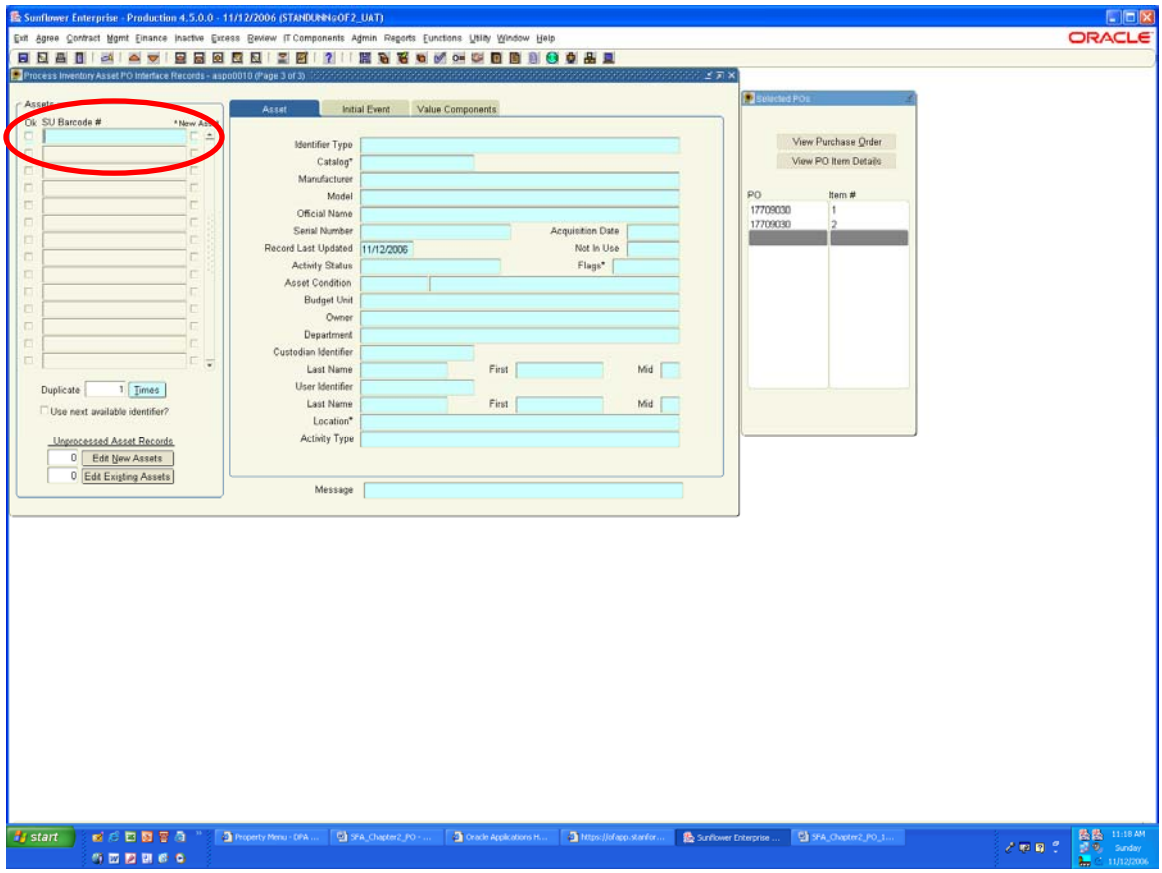
If you desire that ALL lines in the PO be included, you can do that in one step by clicking on the double-arrow (>>).

If you make a mistake and want to remove a line from the Allocation box, do so by highlighting the line in the Allocation box you want to remove and click on the right arrow button (<). Likewise, clicking on the double-left arrow (<<) will remove all lines from the Allocation box, allowing you to start over.

If more than one PO is to be included, that can also be done from this screen, but is slightly more complicated. Please contact your PSR for instruction for that.



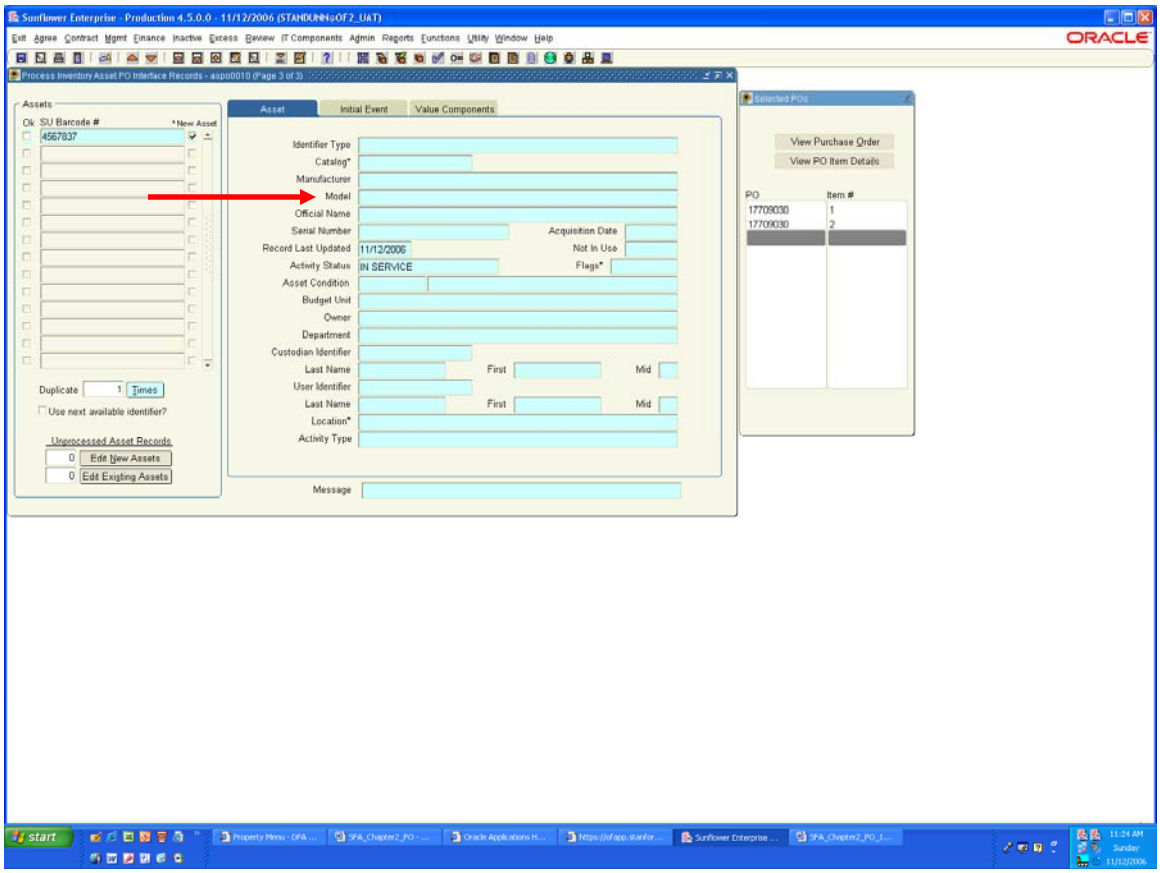
Once you have selected all of the lines to be included in the asset record, click on the “Allocate” button.



The Asset Record screen appears, and the cursor is already in the field for the SU Barcode number. This is where you enter the seven-digit number from the Stanford Property barcode tag for the item being recorded.

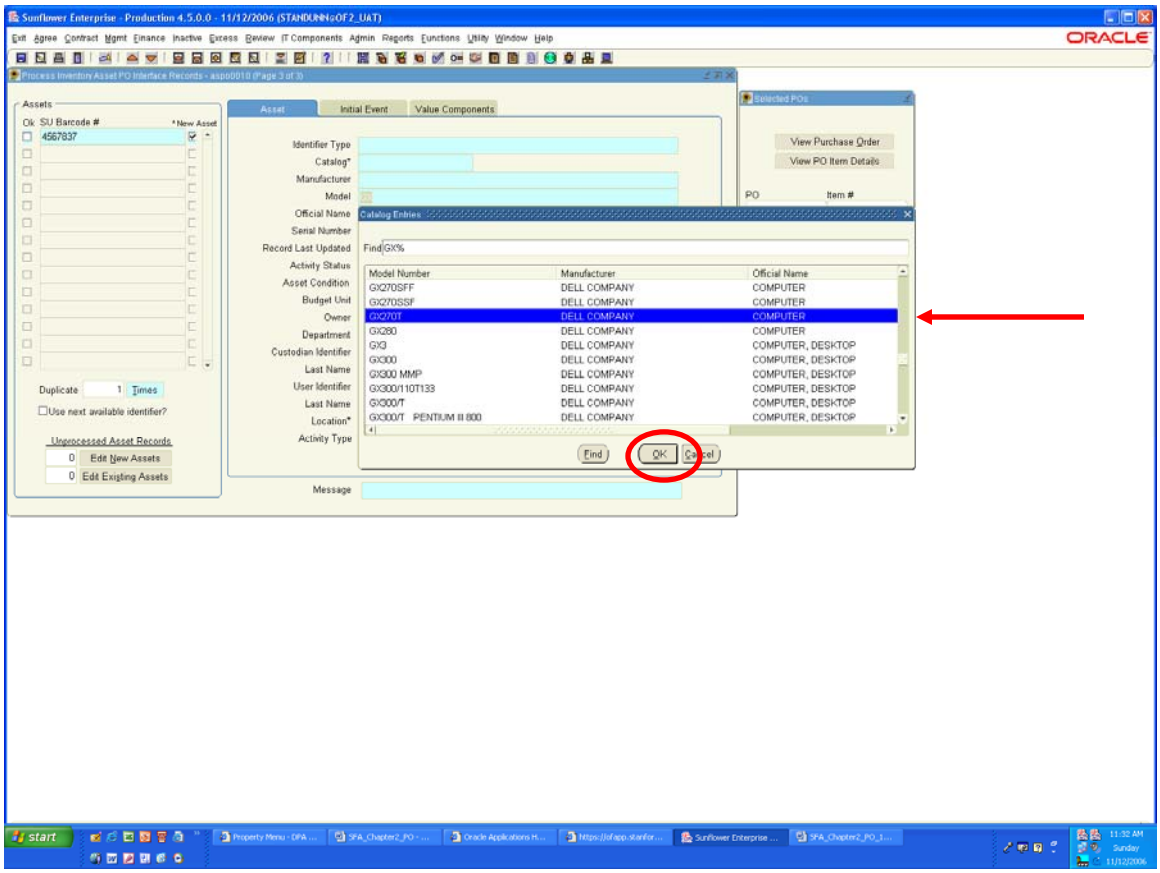
Only the last seven digits should be used – simply ignore the first five zeroes on the tag number – the system will only accept seven digits, and recognizes the specific algorithm the University uses for the tag number sequences.

After entering the tag number, hit the TAB key, or use your mouse to move the cursor to the Model Number field.

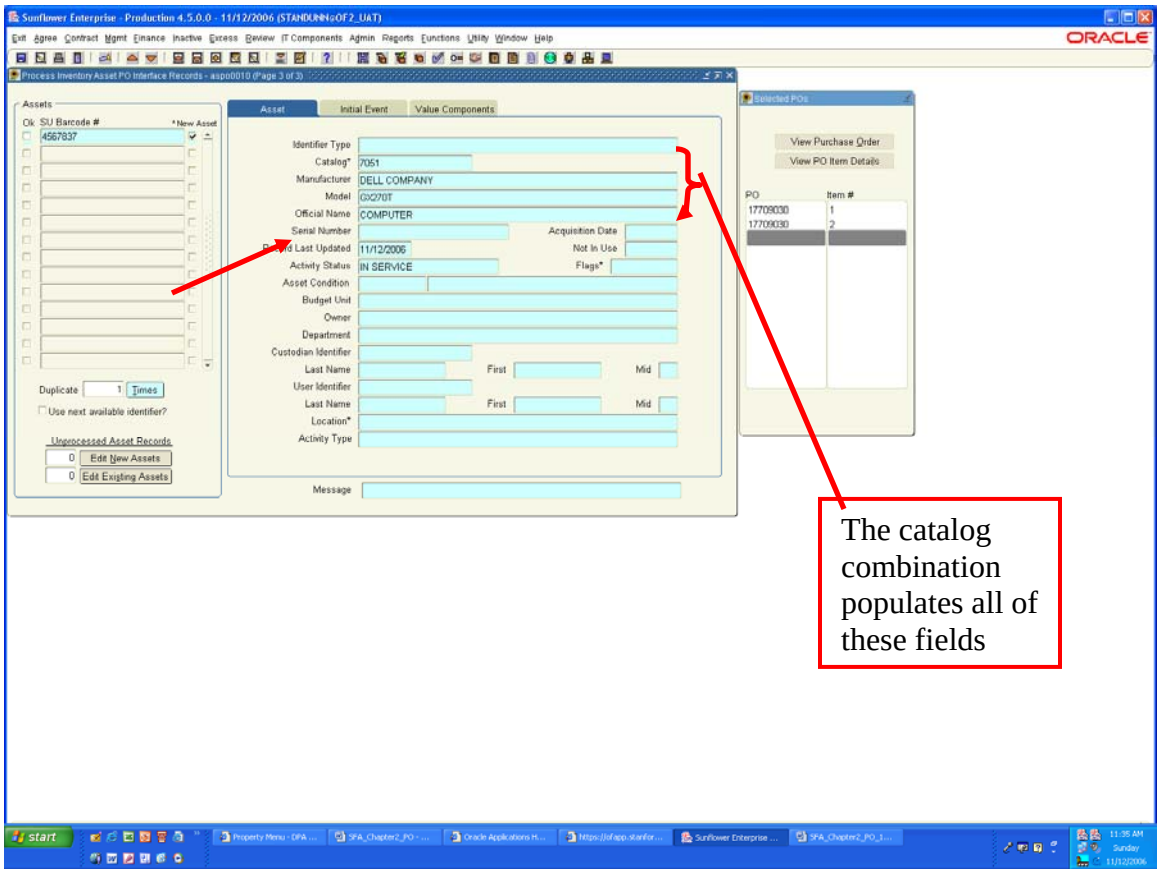


Enter the first few characters on the model number in this field, then double-click to obtain the list of values that begin with those characters. For example, if the model you want to find is GX2700, you would enter GX and then double-click, so you can see all model numbers that begin with GX. This ensures that you see any likely configuration of the model, such as GX2700, GX 2700, GX-2700, etcetera. The list of values is arranged alphabetically by Manufacturer, so scroll down to the desired manufacturer name and then look for the model you want.

If the model you need is not on the list, contact your PSR and ask for the creation of a new catalog entry. The manufacturer-model-description combinations are maintained by central PMO in order to provide consistency in the system for accurate reporting and searches.



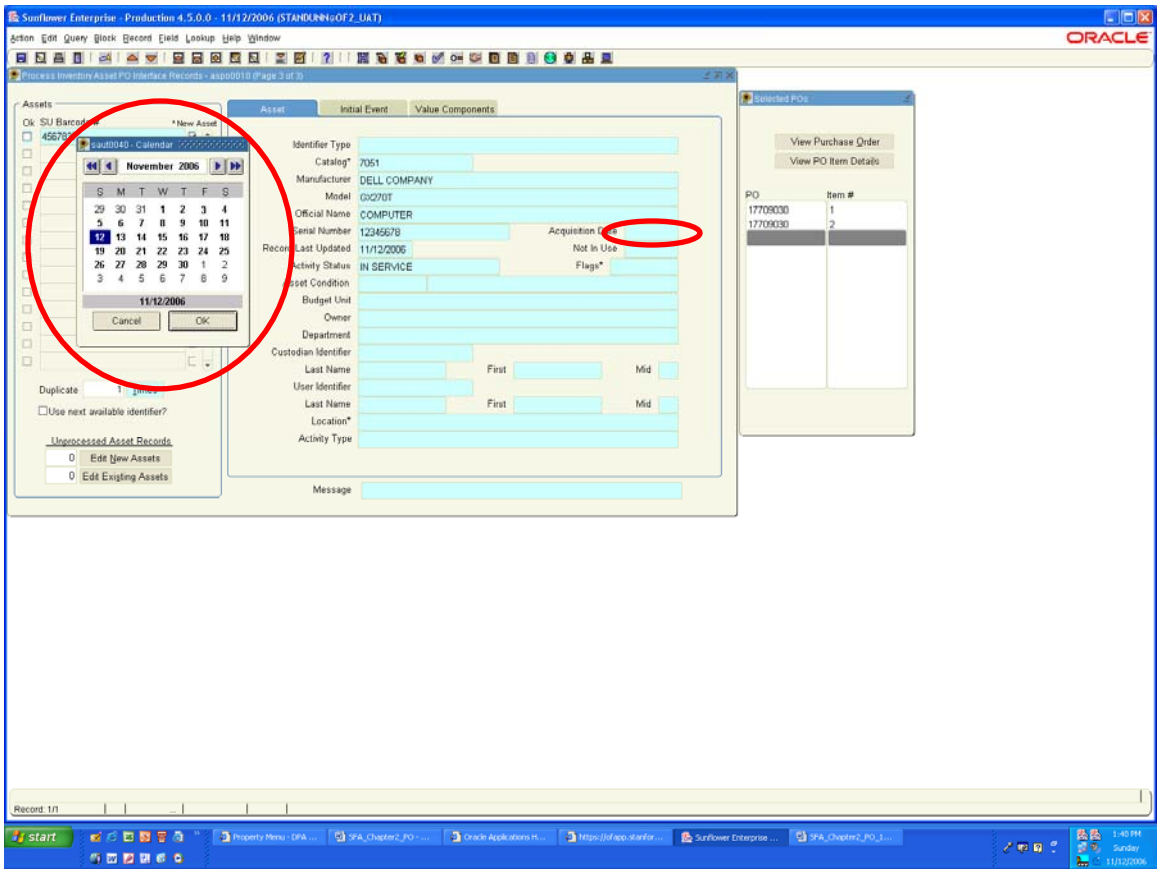
Once you locate the desired combination of manufacturer, model and description, either double-click on it or highlight it and click on the OK button. Either will cause the selection to populate into the asset record screen.



Once the catalog information has populated, the next field is serial number.

Serial number is important for a number of reasons, so please enter one if available. (This is a means for searching for the record if the tag is ever damaged or lost, and is a required search whenever an asset is being disposed without a tag). Only leave the field blank if there is no serial number at all. In those cases, please do not enter anything in this field (such as none, NA, NV, not available, etc – just leave it blank)

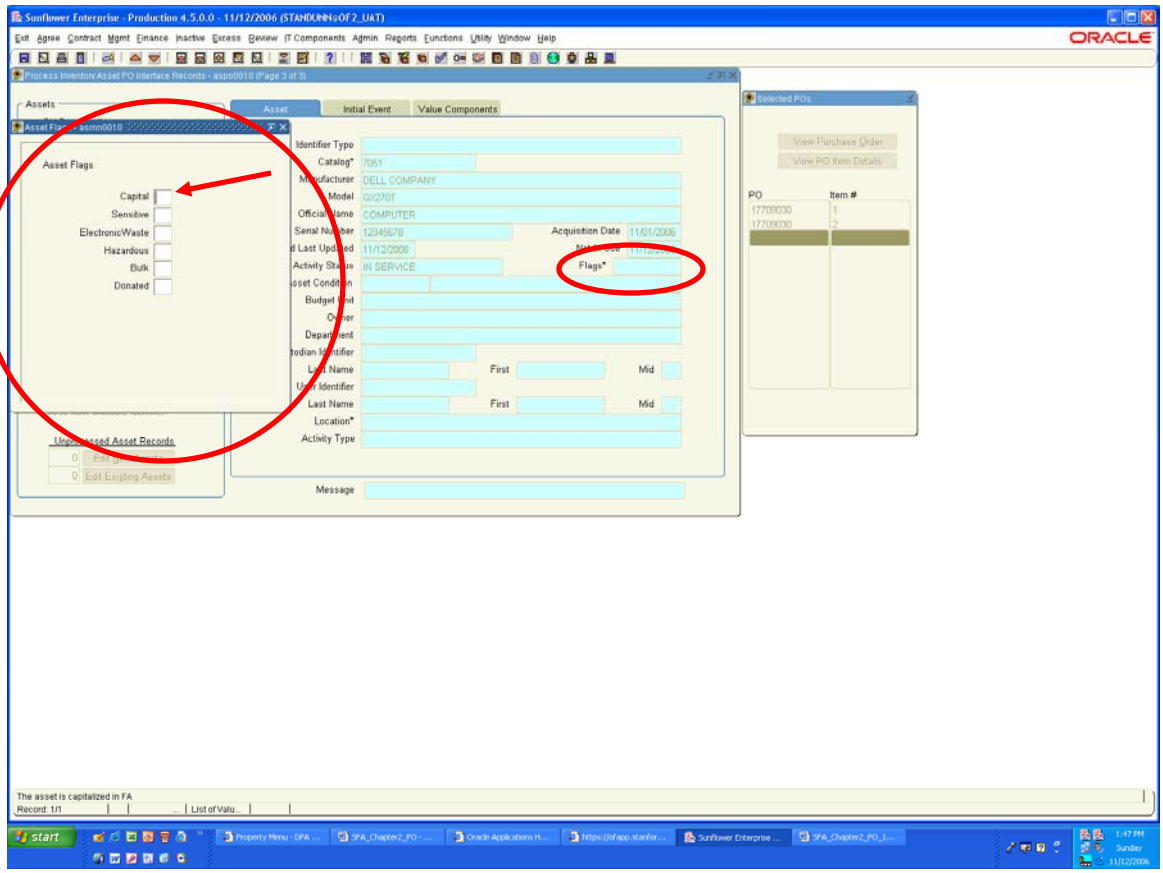
The Sunflower program recognizes serial numbers in conjunction with the catalog combination, and will not permit the creation of a record with the same serial number, in order to prevent duplications in the system.



The next field you tab into is the acquisition date field. If you double-click on this field, a calendar window will open, and you can select the date by selecting the proper date/month/year from the calendar and clicking OK. The acquisition date should be the date the asset was originally physically received, and should match that receipt date in the purchasing system. (If there are multiple receipt dates due to multiple shipments of components, please use the earliest date)

The date can also be entered into this field directly using the format MM/DD/YY or MM/DD/YYYY (either will work).

The next two date fields are not really used. One updates each time there is a significant change made to the record (i.e. location change) and the other is not used at all. Allow these to simply default to today's date.

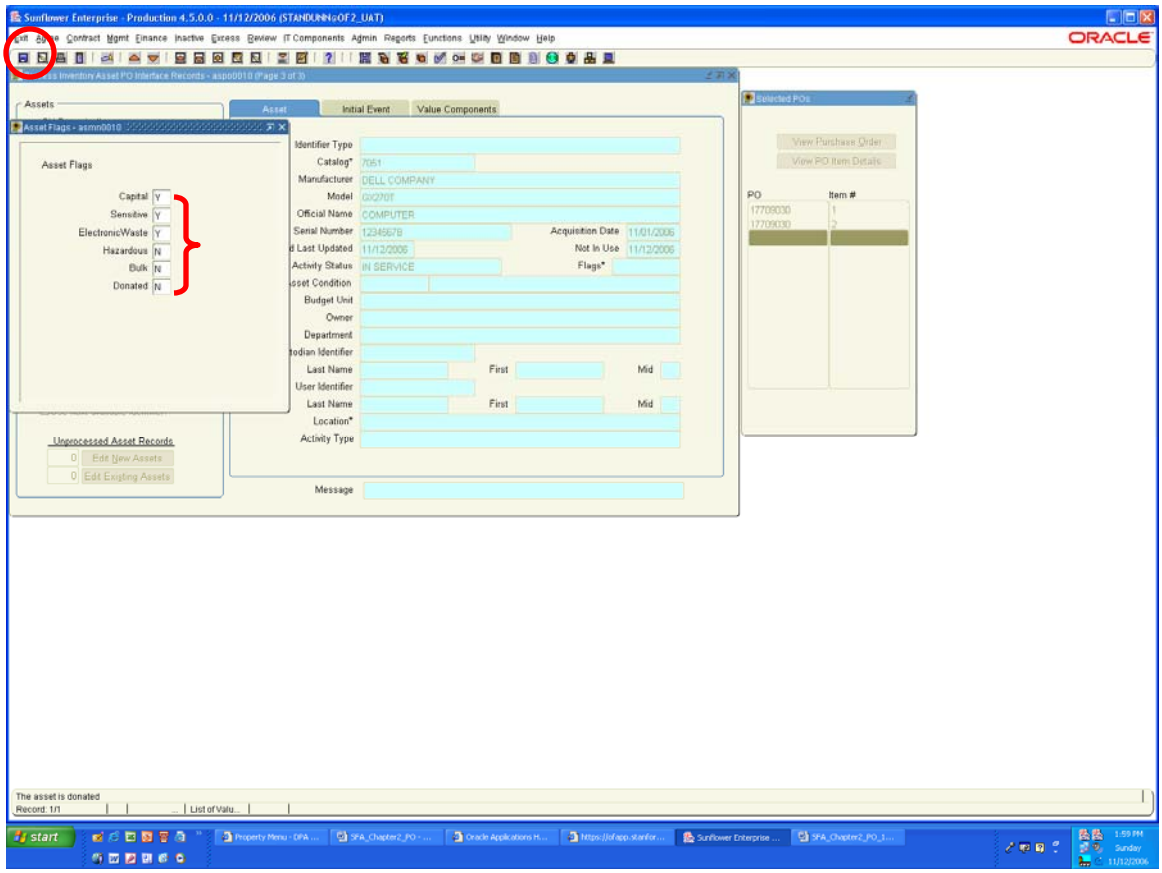


The next field is VERY important, as this field designates whether or not an asset is considered capital, and therefore eligible for depreciation. Double click on the Flags field to open the window, and answer Yes (Y) or No (N) to each of the six choices, using the definitions as follows:

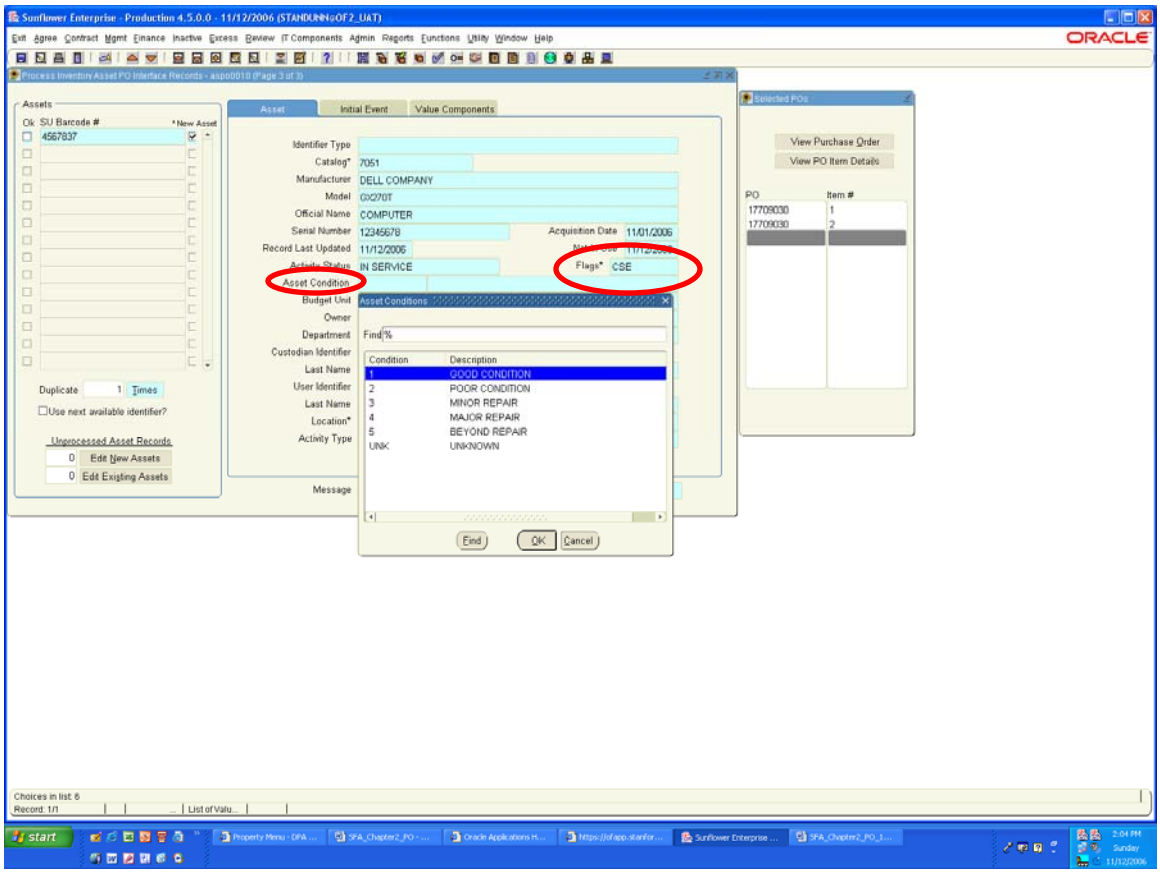
Capital – total cost $5,000 or more with useful life of a year or more
Sensitive – item capable of containing data, such as a computer or drive
Electronic Waste – item contains electronic circuitry, requires recycling
Hazardous – item used in lab setting involving bio or radiological hazards
Bulk – contact PSR – item is one of 25 with total cost of $10,000 **
Donated – item was donated to the University, may or may not be capital

** Bulk items are very uncommon and specific criteria must be met – please do not use without checking with your PSR prior to the acquisition.

See next page



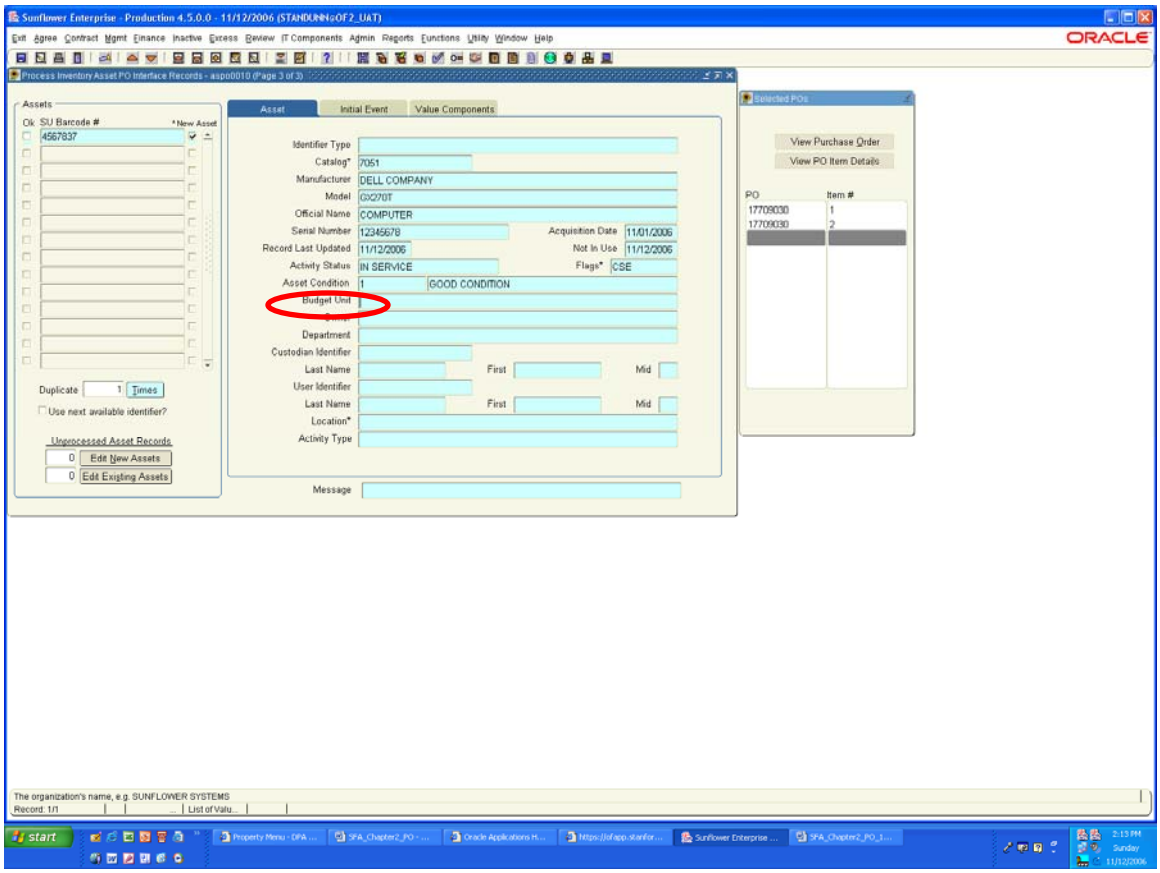
After completing all six fields in the “Flag window”, click on the Save icon in the upper left corner. The flag field will populate with the first letter of each of the fields for which a ‘Y’ was entered (see next page).



Notice how the flags field has populated with each letter as indicated.

The next field is Asset Condition. Double-clicking will bring up the list of choices. A shortcut here is to enter the number corresponding to condition you want to record. As most new records are for new assets, the condition should be '1', or 'good condition'.

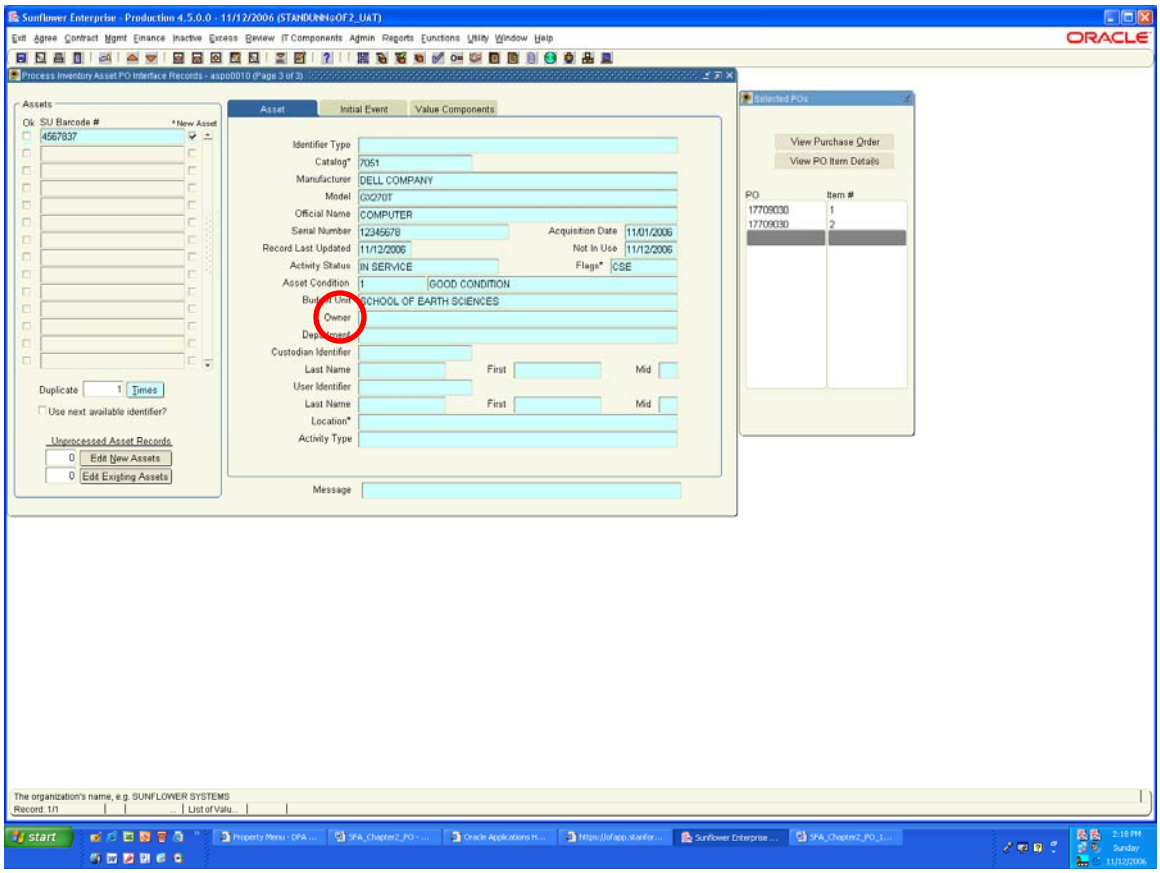
Either enter a number 1 through 5, or double click, select the desired condition and click OK. Tab to the next field.



The next field is Business Unit, which is the organization that oversees your department, such as a School or Administrative area (Humanities and Sciences, Provost's Office, School of Engineering are some examples) As always, double-clicking on the field will provide a list of possible choices.

Enter or select your Business Unit and tab to the next field.

(Note: If you do not know your Business Unit or are uncertain, please ask your PSR for direction rather than selecting the wrong choice. This field is useful in reporting, and incorrect data will result in poor reporting results)

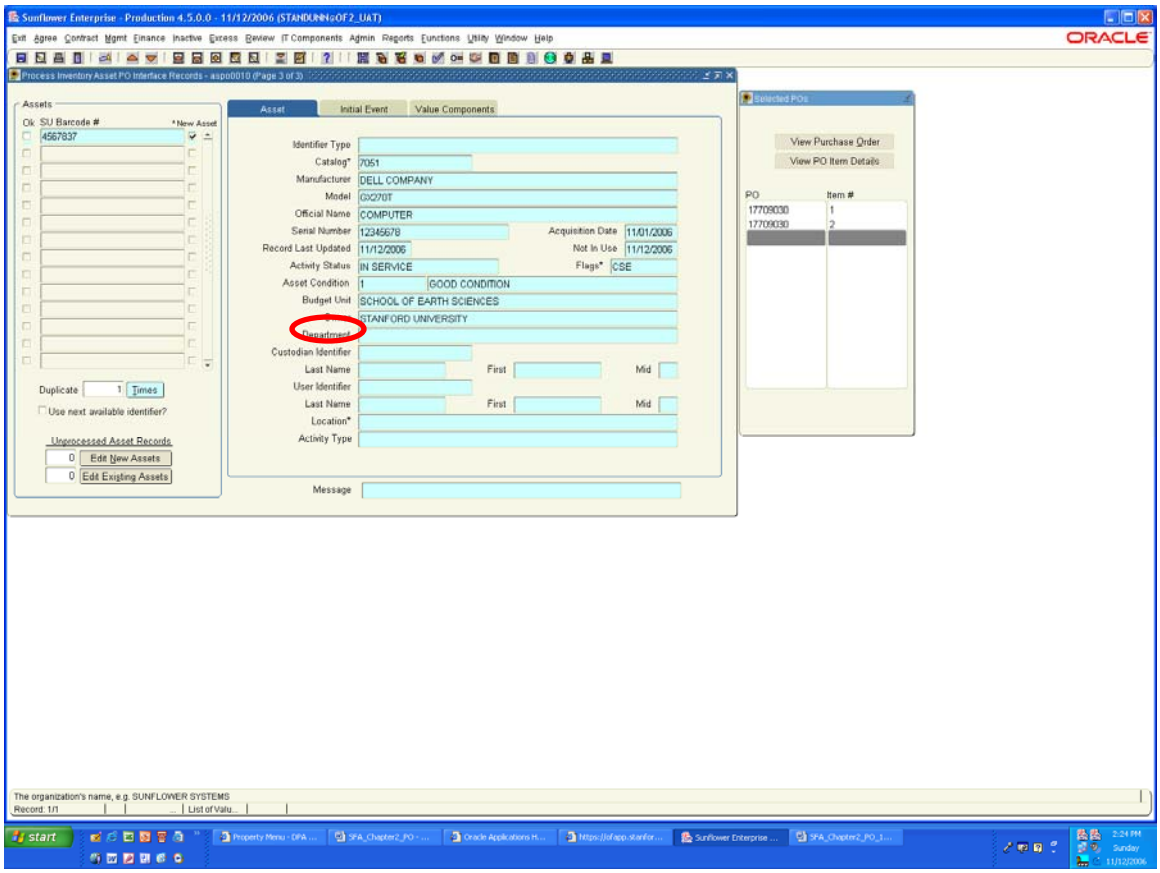


The next field is “Owner”. There are only three options:

Stanford University (title vests with Stanford)
Federal (title vests with the federal government)
Others (title vests with a state, another institution, or individual)

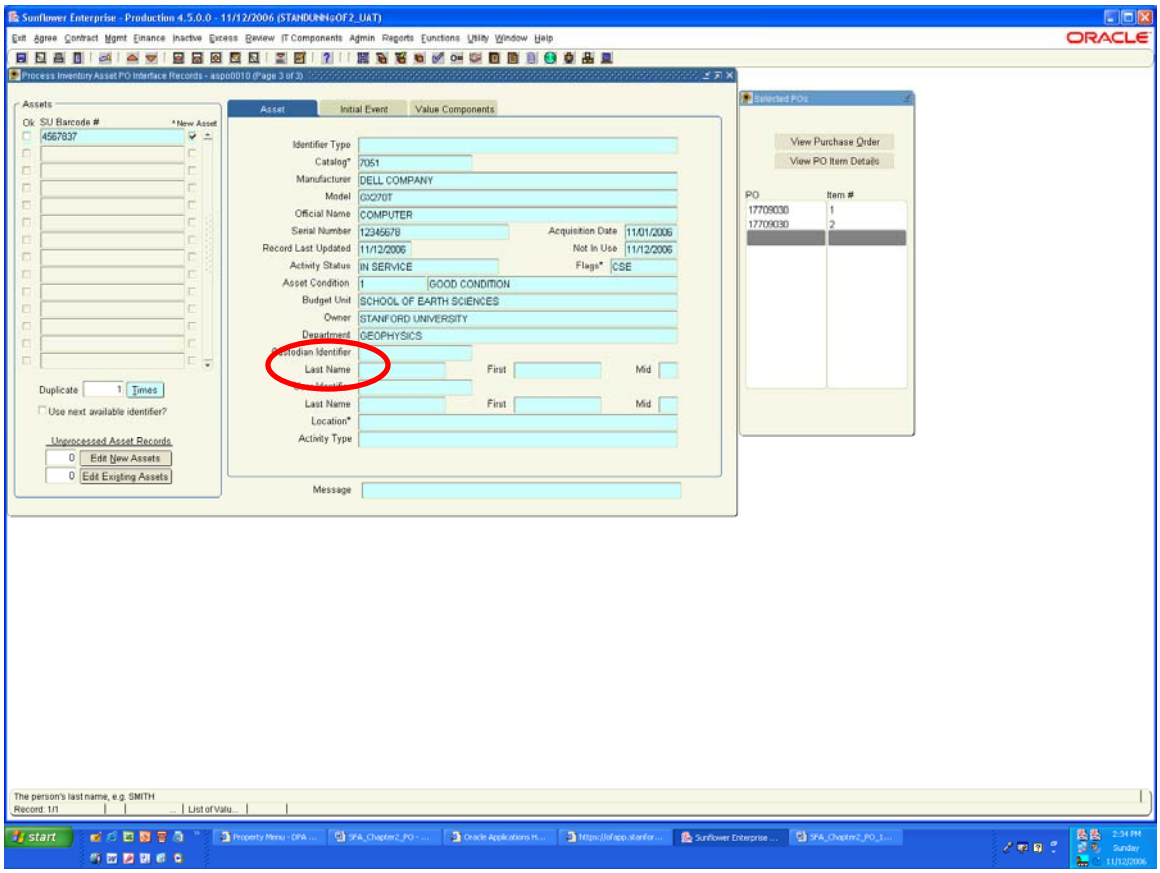
(shortcut note: you only need to enter the first letter here, the remainder will populate automatically)

Ownership is determined by the funding source for the acquisition – if ever in doubt, check with your PSR for additional information.



Department is next – and as always, double-clicking will provide a list of possible choices. Once you are familiar with your department name(s) entering the name manually is generally faster – especially if your department begins with a unique series of characters (for example, only Geophysics begins with GEOP. Entering those four letters and hitting tab will automatically fill the field with the name Geophysics)

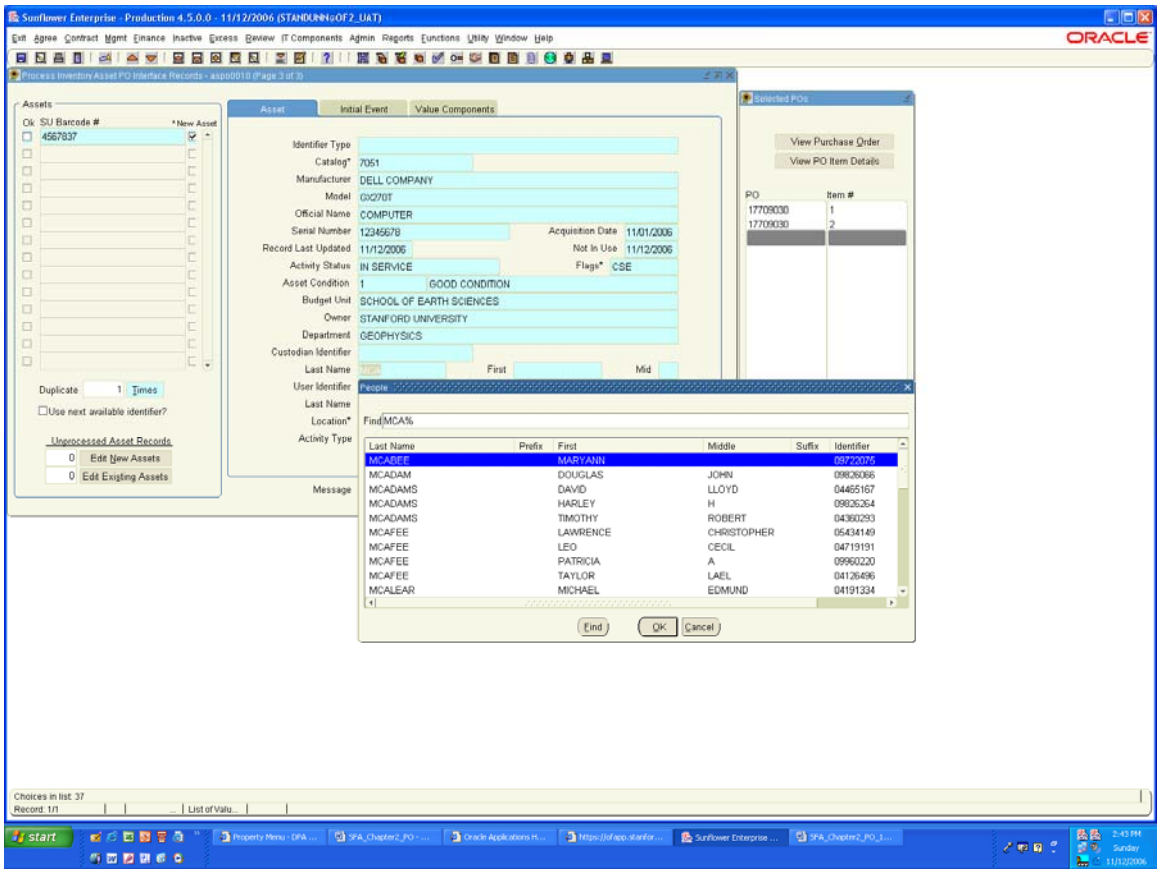
Again, if you are unsure, check with your PSR. Entering a department name other than one for which you are the DPA will result in the inability to save the completed record.



Custodian is the person who has authority over this asset. It must be a Stanford employee, but should also be the person who has decision power over the movement, use and/or disposal of the asset. A PI, lab manager, office manager or the like would be an appropriate custodian choice.

Custodian identifier is the employee ID, so skip over this and go directly to the field for the custodian's last name. Enter their last name and hit tab (or enter the first few characters of the name and double click).

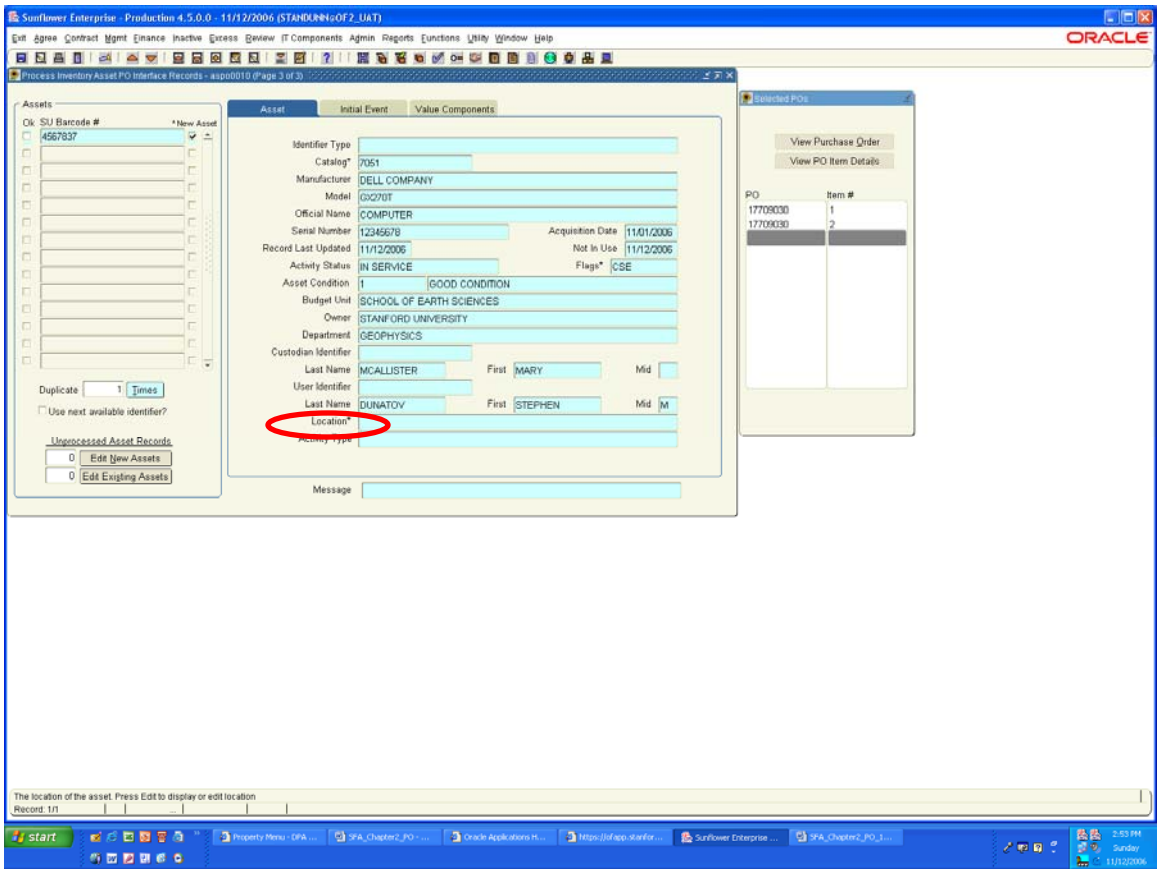
See next page



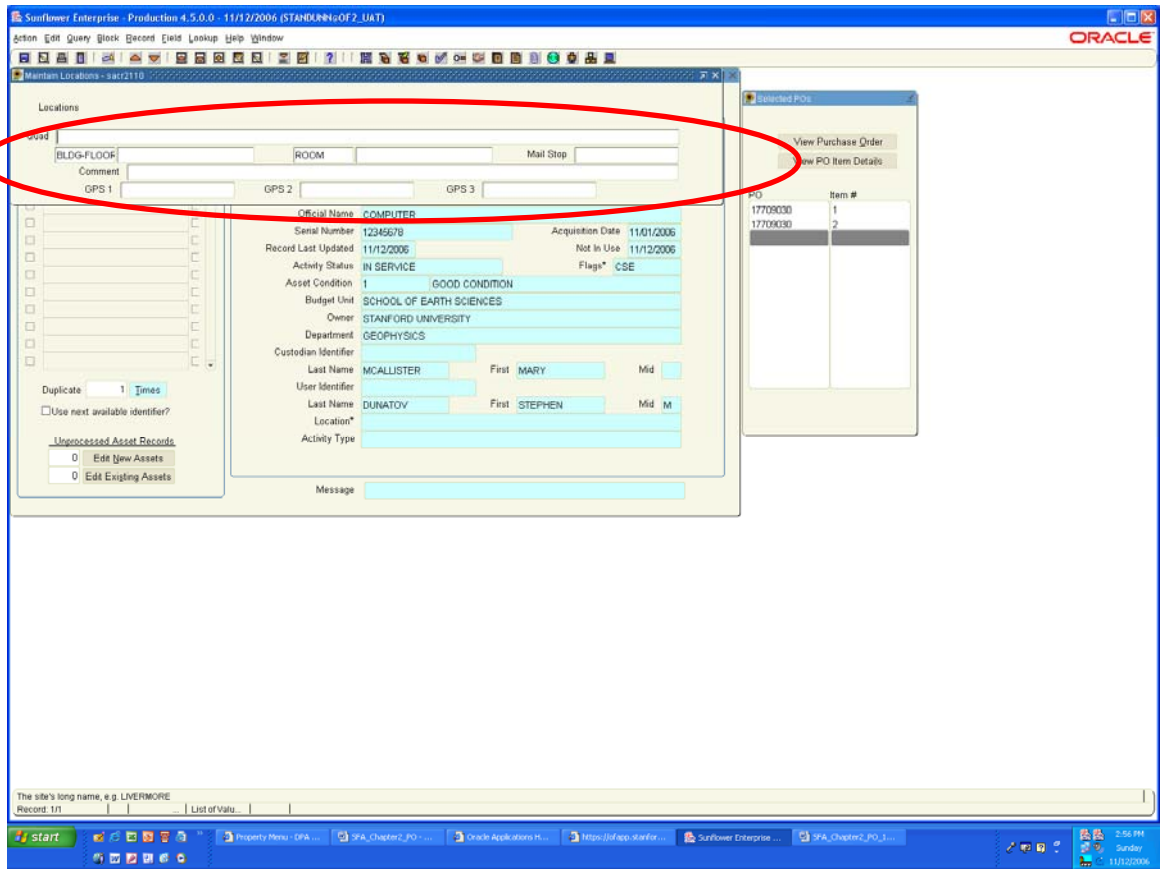
In this example we entered MCA and hit tab. A list of all valid employee names beginning with MCA has appeared, and we can now scroll through the list and locate the name we want.

This list flows to Sunflower directly from the HR system, so if the name you want is not available, it could be due to a number of reasons – most commonly the person is not a permanent Stanford employee, in which case they are not eligible to be a Custodian of equipment. If you believe the name is missing in error, contact your PSR for guidance.

Once you have selected the Custodian, perform the same steps to select the "User". User is optional, used generally when the day-to-day user of the equipment is someone other than the custodian. This could be an admin, member of lab staff, etc – but must still be a Stanford employee in order for the name to be in the HR system. (Later we will see a place to record non-Stanford people or groups as desired)



The next field is Location. Location is actually a multiple-part field (also called a “complex field”) which must be expanded for data entry by double-clicking on it. Double-click on the location field to cause the multi=part window to open, as seen on the next page.



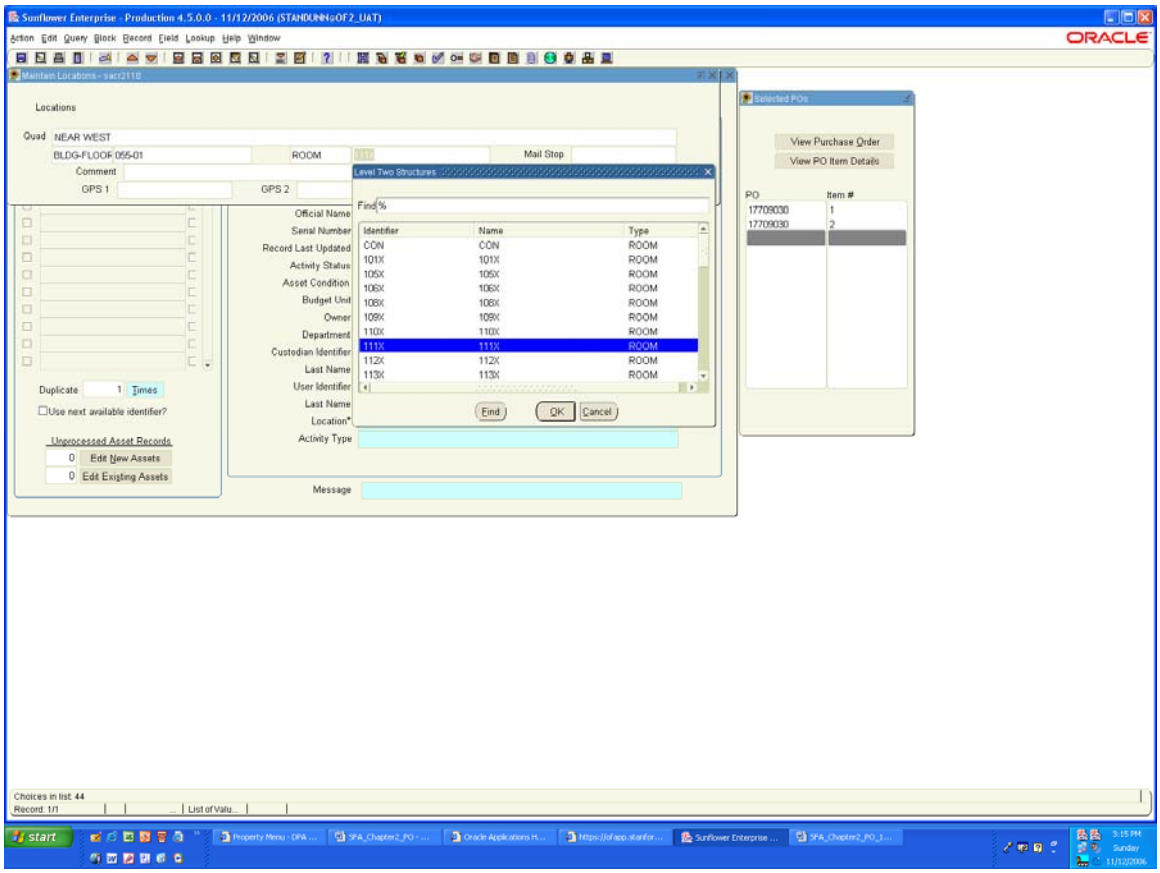
You can now enter each portion of the location. Location consists of the following elements:

Quad – the name of the quad as determined by the Stanford Basemaps
(note: see the PMO website for the quad names)
Bldg-Floor – the building number and floor combination
Room – the room number as recorded in the space inventory system

Note: the location feeds into Sunflower from the space inventory system (currently iSpace). If you cannot find the room number you seek, check with your local space coordinator.

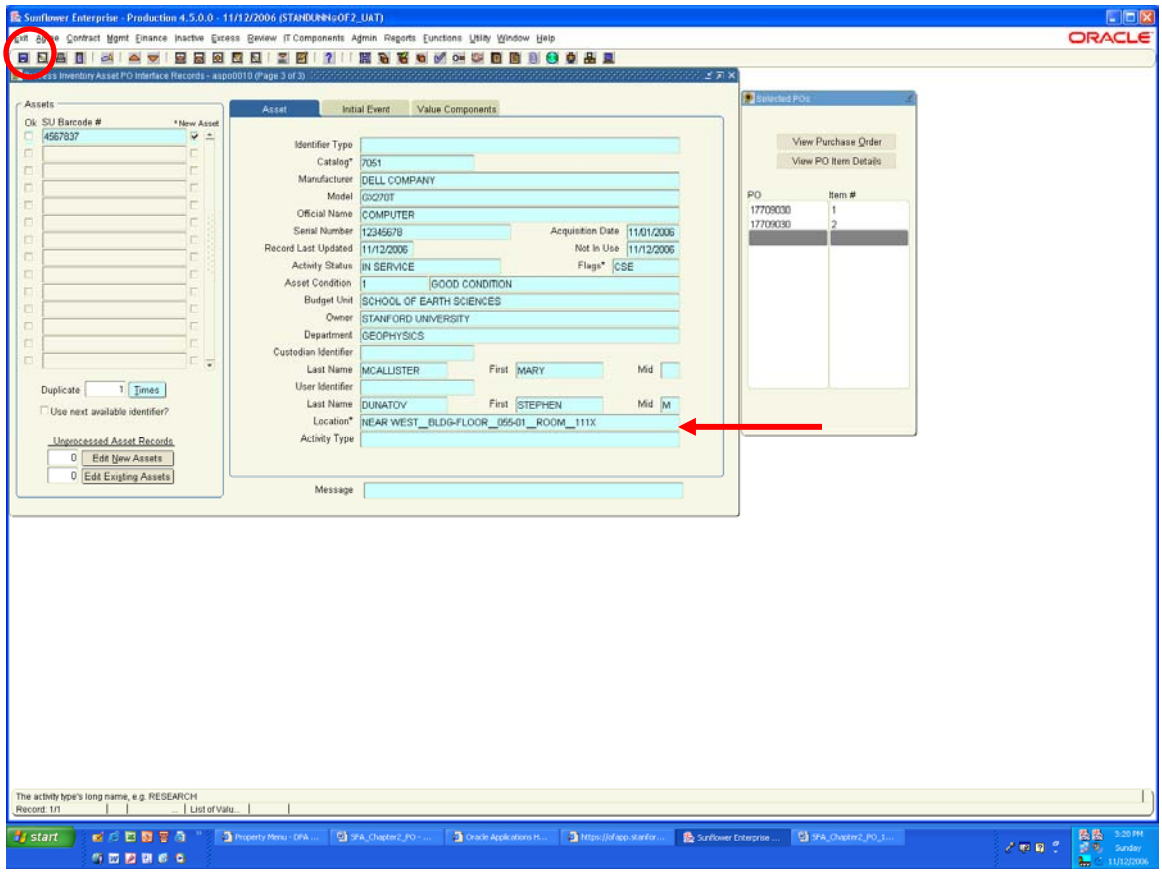
Mail Stop and the GPS positions are not used by Stanford. Comment can be used to further identify an asset location (i.e. “in locked cabinet”) but this data can be overwritten as blank when physical inventory scanning occurs.

As always, double-clicking on any of these fields will provide a list of choices. Once quad is selected, the buildings narrow to those in that quad. Likewise, once the building-floor is selected, only rooms on that floor will be available in the list of values.



In this example, we have already selected the NEAR WEST quad, and building-floor 055-01. Those fields are now populated with these choices.

By double-clicking on Room, the list of choices for rooms on the first floor of building 055 is shown. We are selecting room 111X from the list. After choosing the room, we will click on the Save icon and the location data will populate in the location field of the main record, as seen on the next page.



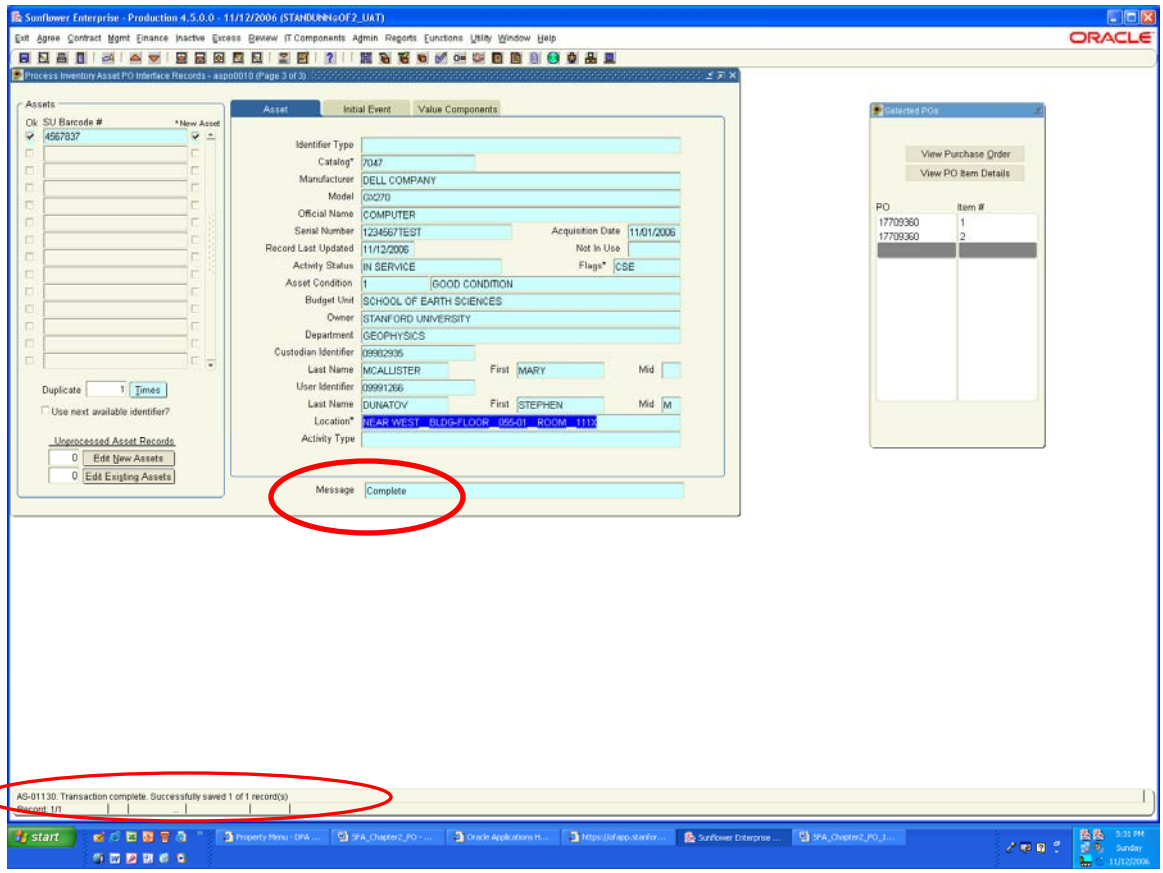
Here we see the individual pieces of the location strung together in the location field.

Activity Type is not used by Stanford, so all fields available in this window have now been entered.

Please save the record by clicking on the blue Save icon in the upper left corner.

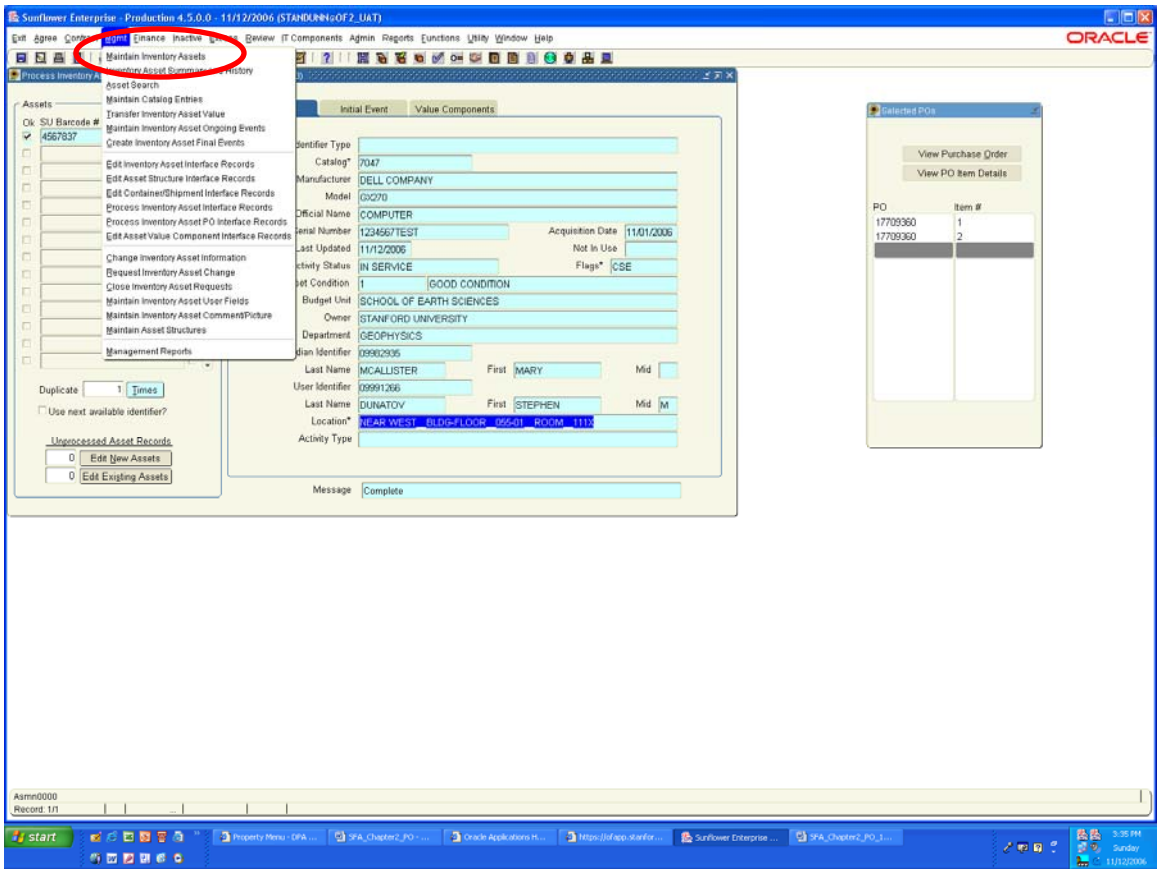
THERE ARE TWO MORE STEPS TO COMPLETE THE RECORD!

Check that your work so far has saved correctly – see next page

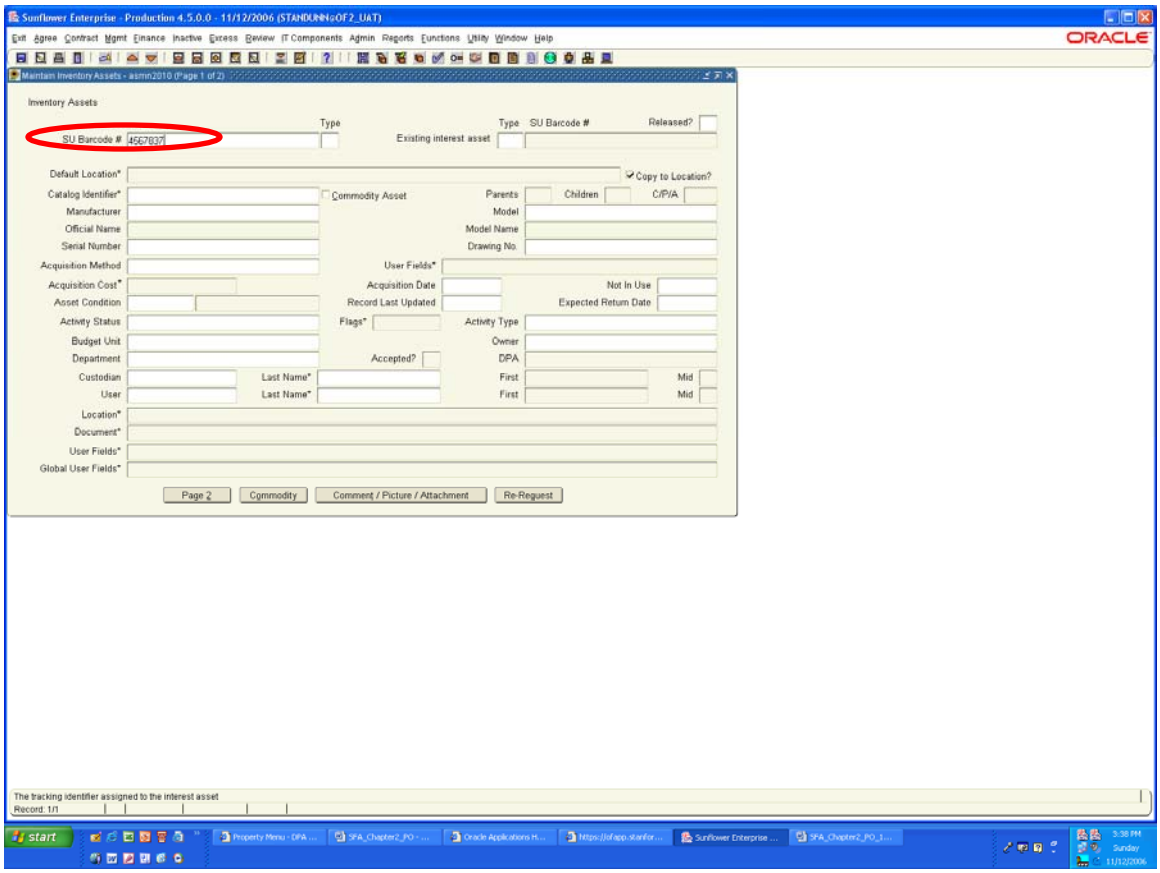


The word “Complete” should appear in the Message field, indicating the record saved properly. A second verification appears in the lower left corner of the window, stating “Transaction complete. Successfully saved 1 of 1 record(s)”

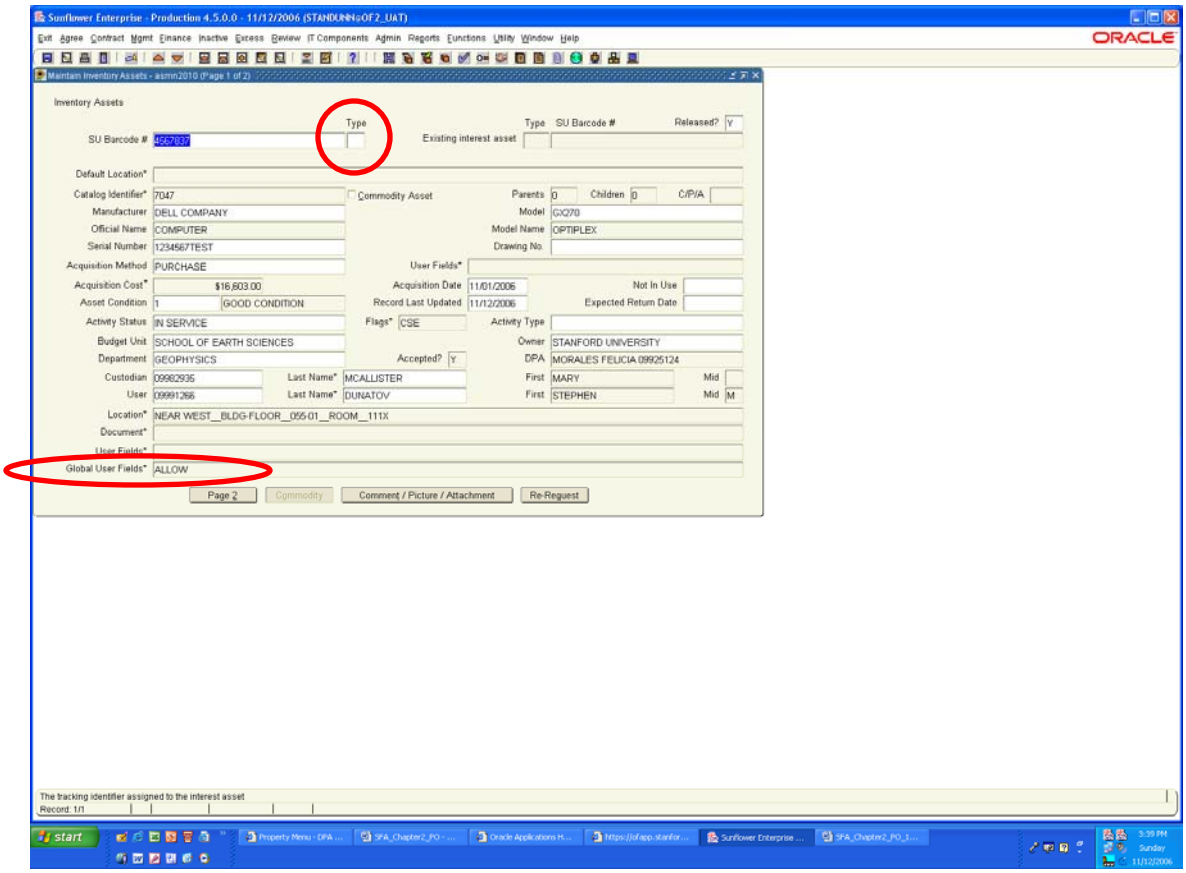
Stanford needs two more pieces of information that are not able to be entered in the PO Interface. Please see the next steps to complete the record.



From the Mgmt pull-down menu, select “Maintain Inventory Assets”, the first choice on the list.



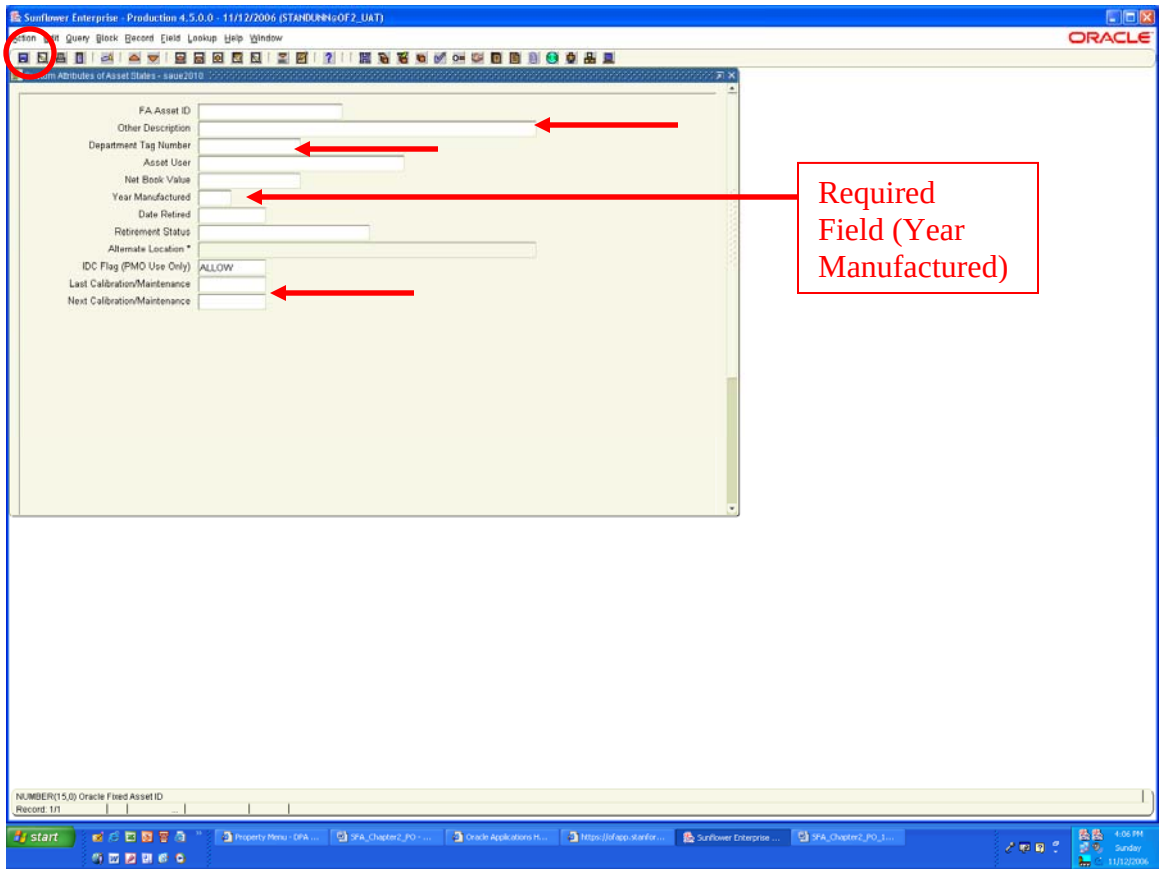
Enter the tag number for the record just created, and hit enter or tab.



One of the attributes needed is an indicator showing whether the asset can be physically tagged or not (Taggable/Untaggable). Put a T in the box unless the asset is physically incapable of holding a tag, in which case, input the letter U. (Untaggable records must be printed out and kept in an office file for inventory and auditing purposes)

The other piece of information required is located within the Global User Fields – a multi-field window that also has some very useful fields created just for the DPA community.

Double-click on Global User Fields



The required field here is the Year of Manufacture.

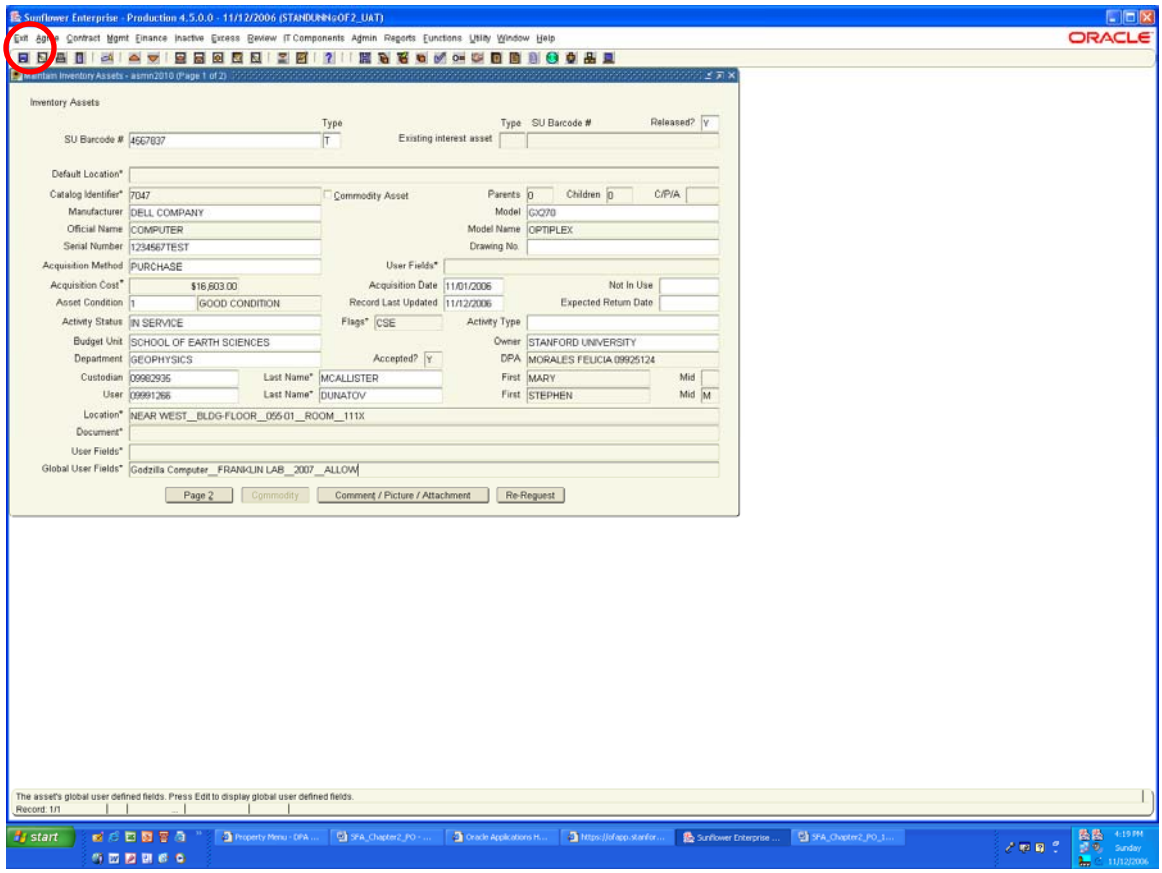
Other fields useful to DPAs are Other Description, very useful when the official catalog combination is not clear enough, or in some cases, when the department has “pet names” for certain assets, like servers or lab equipment.

Some departments also use their own internal identification numbers. The Department tag number field can be used for this.

Calibration and maintenance of equipment can also be tracked in Sunflower if desired. Fields for last maintenance date and next due date are available for this purpose.

Here also is a free-form Asset User field, for use when the user is not in the Stanford HR List or if you wish to designate a group, such as a lab or work unit. Any user information can be input here.

Click Save to save the Global User Field information.



Finally, save the entire record by clicking once again on the save icon.

You have now completed a record entry via the PO Interface.