

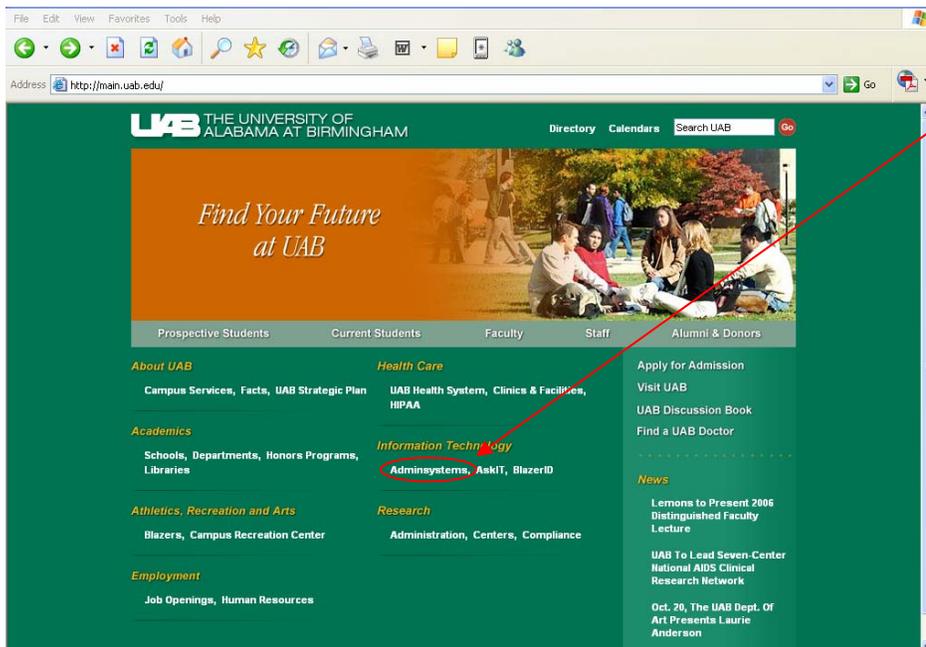
Sunflower Training (Step-By-Step)

Welcome to Sunflower Training!

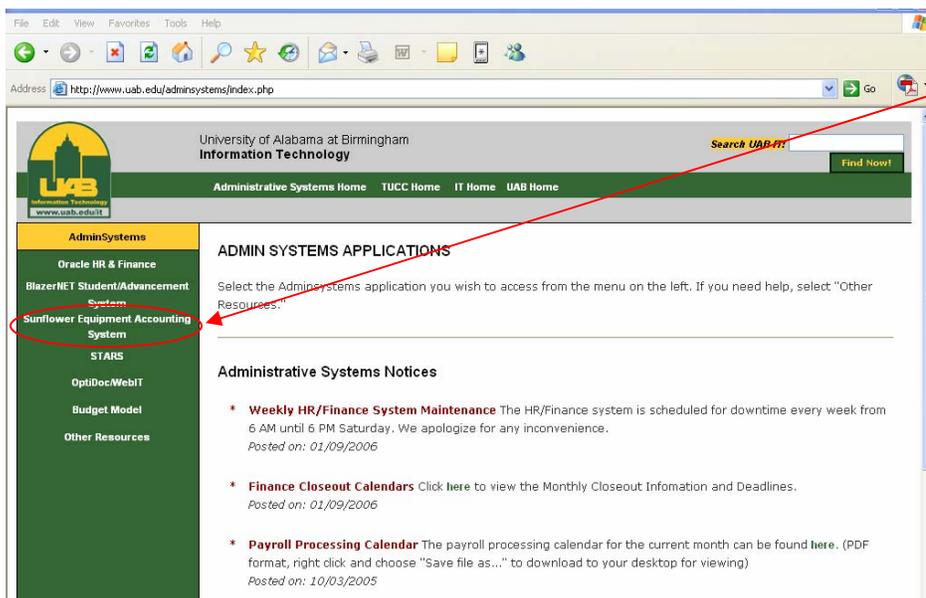
The following training is designed to enable you to learn how to access information about capital assets in the Sunflower Assets system. It is suggested that you print this training manual and then perform the easy to follow instructions of the Step-By-Step method.

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.

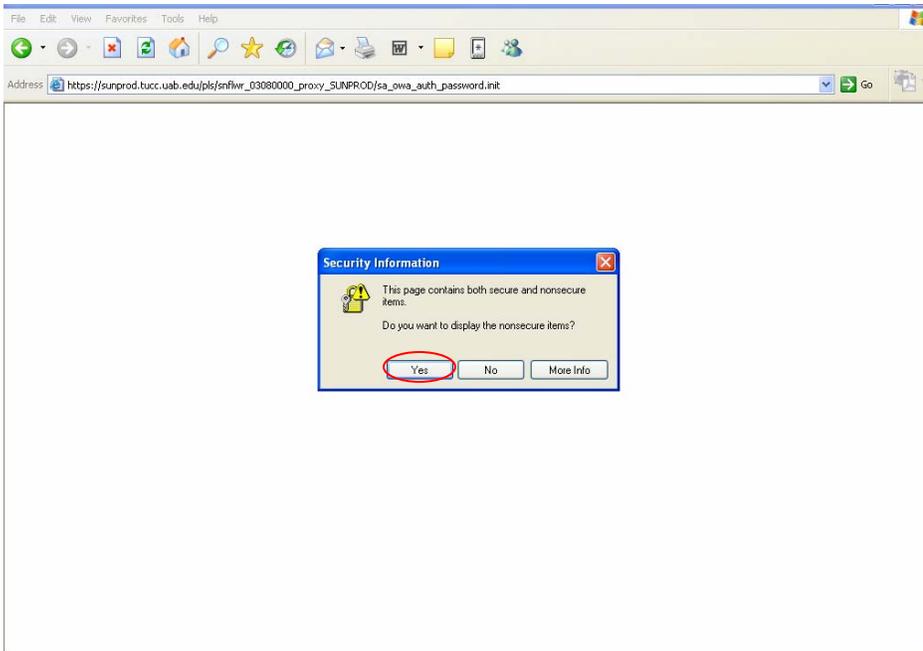


Start at the UAB Main Web page. Then, **click** on the AdminSystems link beneath Information Technology.

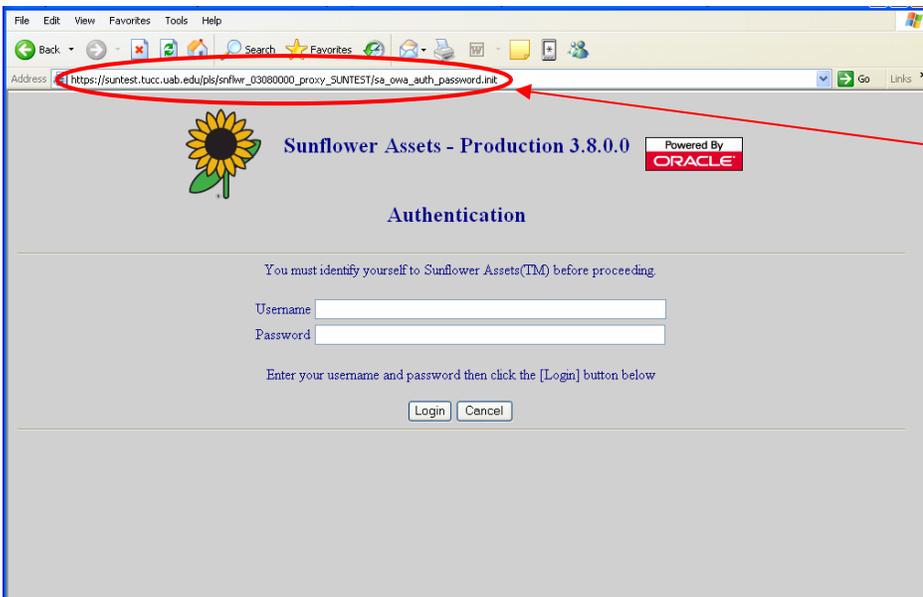


In the AdminSystems page, **click** on the Sunflower Equipment Accounting System link in the left margin.

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**.

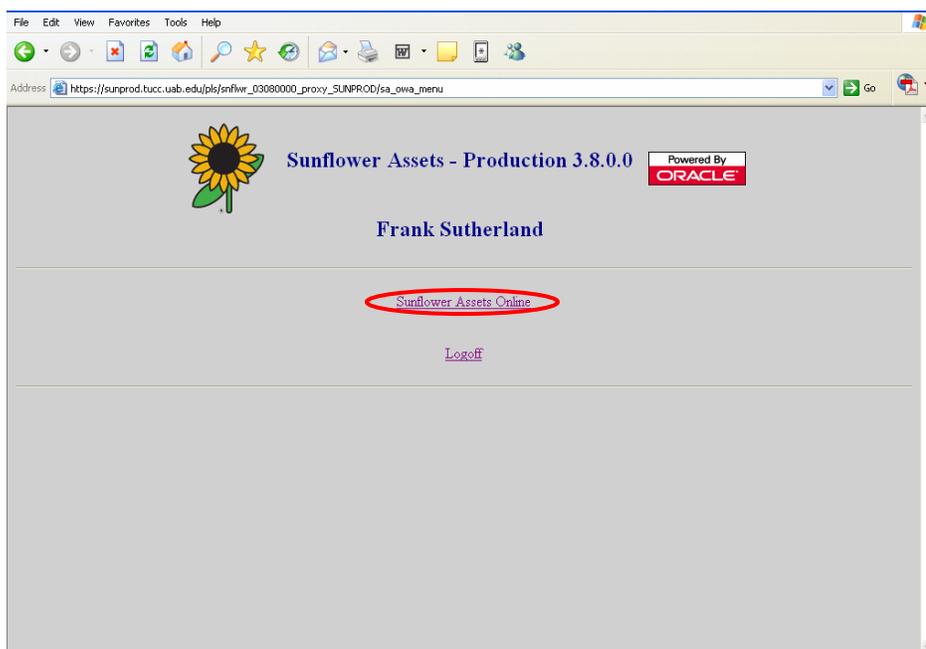
This is the Authentication screen where you login to Sunflower Assets.

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. **Note:** 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.

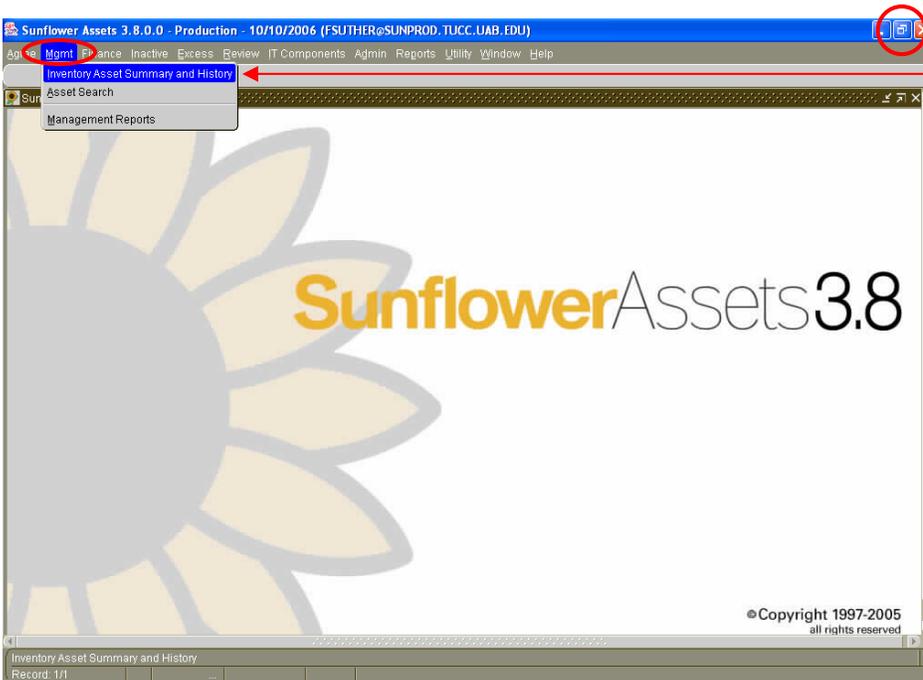
Sunflower Training (Step-By-Step)

So, What Am I Looking At?



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

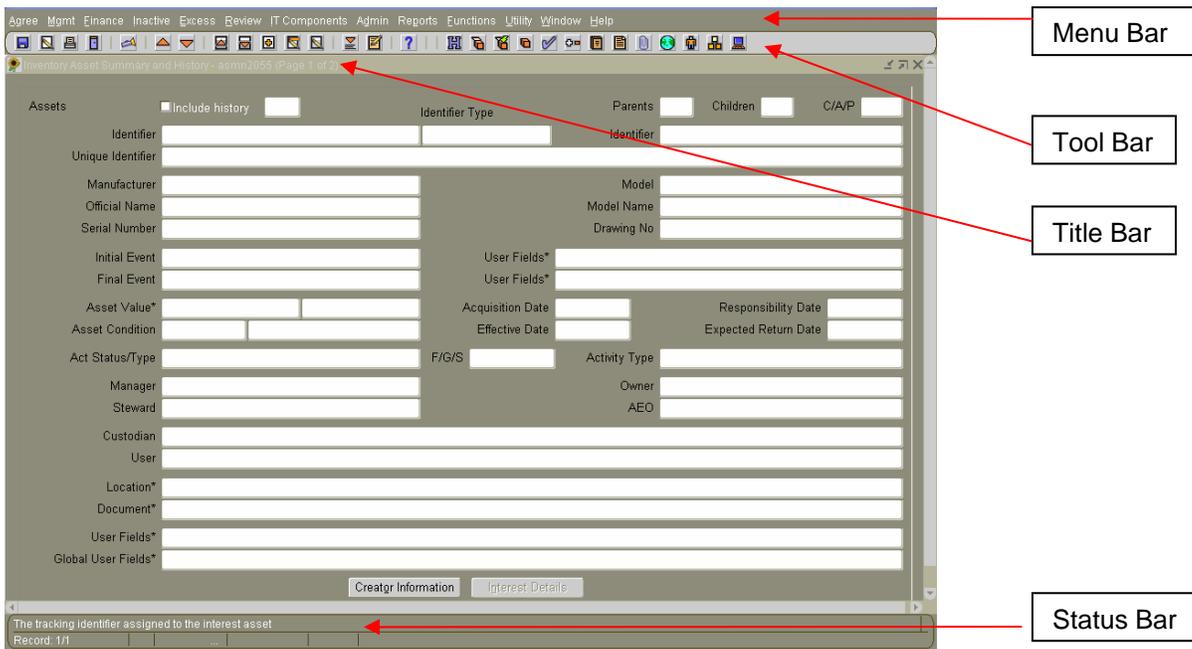
In the Menu bar, you will see various modules. The only module that end-users will find most useful is **Mgmt**.



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 cursor 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).

Sunflower Training (Step-By-Step)



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.

Assets Include history Identifier Type Parents 0 Children 0 C/A/P C

Identifier 399877 Identifier 399877

Unique Identifier

Manufacturer AMAXA BIOSYSTEMS Model AAD-1001|ELECTROPORATOR

Official Name ELECTROPORATOR Model Name

Serial Number 20600231 Drawing No

Initial Event CREATE CAPITAL ITEM User Fields*

Final Event User Fields*

Asset Value* \$12,150.00 CAPITALIZED Acquisition Date 08/31/2006 Responsibility Date 08/31/2006

Asset Condition UNK UNKNOWN Effective Date 10/02/2006 Expected Return Date

Act Status/Type IN SERVICE F/G/S NNN Activity Type

Manager UNIVERSITY Owner UAB

Steward 392100000: BIOCHEM & MOLECULAR GENETIC AEO SUNDERLAND GARY L 1016607

Custodian

User

Location* ON CAMPUS_BUILDING_KAUL_ROOM_530

Document*

User Fields*

Global User Fields* FRONT_GRANT

Buttons: Create Information, Interest Details

Footer: The tracking identifier assigned to the interest asset
Record: 1/1

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)

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)

The screenshot shows two windows. The top window, 'Asset Value Component Summary', has a table with columns 'Asset Value Type', 'Asset Value', and 'Quantity'. It lists 'PO PURCHASE' with an asset value of \$11,688.03. The bottom window, 'Asset Value Component Details', has a table with columns 'Date', 'Asset Value', 'User Fields*', 'Cap?', and 'Person'. It shows two records for 01/14/2006 with asset values of \$11,439.67 and \$248.16. The 'User Fields*' column contains 'Y_FAS 536803_8790_FEDERAL GRANTS & CONTR.'. A red arrow points from a text box to this column header.

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

The screenshot shows the 'Cost Component Attribute Information' window with the following data:

- Federally Funded: Y
- Account Number: FAS 536803
- Object Code: 8790
- Account Type: FEDERAL GRANTS & CONTRACTS
- Funding Organizational Unit: U0301800.CTR. MACROMOLECULAR CRYSTALLOGRA
- Funding Major Component Unit: UNIVERSITY
- PO Requisition Number: XCONV
- PO Requisition Date: 01/01/1900
- PO Number: 113662
- PO Line Number: XCONV
- PO Date: 01/01/1900
- Invoice Number: XCONV
- Invoice Date: 01/01/1900
- Check/Wire Number: 000123681
- Check/Wire Date: 06/03/2004
- Vendor/Lender: FISHER SCIENTIFIC
- Cost Type: CHECK
- Other Reference: [Redacted]
- Traded Out Asset Identifier: [Redacted]

A red circle highlights the close button (X) in the upper right corner of the window.

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)

Asset Value Component Summary

Asset Value Type	Asset Value	Quantity
PO PURCHASE	\$11,688.03	
Total Value		\$11,688.03

Parents 0 Children 0 C/A/P C
Identifier 395465
Model 2500KCJINCUBATOR: LABORATORY
Model Name
Drawing No

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**.

Inventory Asset Summary and History - asrm2055 (Page 1 of 2)

Assets Include history Identifier Type Parents 0 Children 0 C/A/P C
Identifier 395465 Identifier 395465
Unique Identifier
Manufacturer FISHER SCIENTIFIC Model 2500KCJINCUBATOR: LABORATORY
Official Name INCUBATOR Model Name
Serial Number 400264782 Drawing No
Initial Event CONVERTED CAPITAL ITEM FROM EAS User Fields*
Final Event User Fields*
Asset Value* \$11,688.03 CAPITALIZED Acquisition Date 05/12/2004 Responsibility Date 05/12/2004
Asset Condition UNK UNKNOWWN Effective Date 12/31/2005 Expected Return Date
Act Status/Type IN SERVICE F/G/S NNN Activity Type
Manager UNIVERSITY Owner UAB
Steward 331000000.CTR BIOPHYSICAL SCIENCES/ENG AEO HARRINGTON MICHAEL D 1005667
Custodian
User
Location* ON CAMPUS - BUILDING - CBSE - ROOM - 125
Document*
User Fields*
Global User Fields* LEFT_GRANT

Record: 3/3

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

Maintain Locations - sacr2110

Locations

Site ON CAMPUS
BUILDING CBSE ROOM 125 Mail Stop
Structure Level 3 Name
GPS 1 GPS 2 GPS 3

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)

Location* ON CAMPUS__BUILDING__CBSE__ROOM__125

Document*

User Fields*

Global User Fields* LEFT__GRANT

Buttons: Creatgr Information, Interest Details

Footer: The tracking identifier assigned to the interest asset. Record: 1/1

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

Assets Include history Identifier Type Parents 0 Children 0 C/A/P C

Identifier 395465 Identifier 395465

Unique Identifier

Manufacturer FISHER SCIENTIFIC Model 2500KC|INCUBATOR: LABORATORY

Official Name INCUBATOR Model Name

Serial Number 400264782 Drawing No

Initial Event CONVERTED CAPITAL ITEM FROM EAS User Fields*

Final Event User Fields*

Asset Value* \$11,688.03 CAPITALIZED Acquisition Date 05/12/2004 Responsibility Date 05/12/2004

Asset Condition UNK UNKNOWN Effective Date 12/31/2005 Expected Return Date

Act Status/Type IN SERVICE F/G/S NNN Activity Type

Manager UNIVERSITY Owner UAB

Steward 331000000:CTR BIOPHYSICAL SCIENCES/ENG AEO HARRINGTON MICHAEL D 1005667

Custodian

User

Location* ON CAMPUS__BUILDING__CBSE__ROOM__125

Document*

User Fields*

Global User Fields* LEFT__GRANT

Buttons: Creatgr Information, Interest Details

Footer: The asset's global user defined fields. Press Edit to display global user defined fields. Record: 3/3

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

Global Attribute Information - saue2010

Tag Location LEFT

Grant Funded Flag GRANT

Service Center Account

Vehicle Model Year

Vehicle License Number

Replacement Asset

Asset Replaced

Biomed/Engineering Number

Other ID Number

Deferred Depreciations Start Date

Equipment Disposition Form Number

Equipment Disposition Form Date

Record: 1/1

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.

Sunflower Training (Step-By-Step)

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

The screenshot shows the 'Maintain Inventory Assets' window. The 'Initial Event' dropdown is open, displaying a list of event types. The 'CREATE CAPITAL ITEM' option is highlighted. The background form shows fields for Identifier (1244), Type (Existing interest asset), and various other asset details.

Identifier	Type	Type	Identifier	Released?	N
1244	Existing interest asset				

Initial Event Types:

- CREATE CAPITAL ITEM
- CREATE MEMO ITEM
- LATE LEGACY LOAD INITIAL
- REVERSE WRITE OFF CAPITAL ITEM
- REVERSE WRITE OFF MEMO ITEM

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.

The screenshot shows the 'Maintain Inventory Asset Ongoing Events' window. The 'Ongoing Event Type' dropdown is open, displaying two options: 'TRANSFER HOSP TO UNIV' and 'TRANSFER UNIV TO HOSP'. The background form shows fields for Identifier, Manufacturer, Model, and Official Name.

Identifier	Manufacturer	Model	Official Name

Ongoing Event Type:

- TRANSFER HOSP TO UNIV
- TRANSFER UNIV TO HOSP

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.

The screenshot shows the 'Final Event Types' window. The 'Final Event Type' dropdown is open, displaying a list of event types. The 'CAPITAL THRESHOLD WRITE OFF' option is highlighted. The background form shows fields for Identifier, Manufacturer, Model, and Official Name.

Identifier	Manufacturer	Model	Official Name

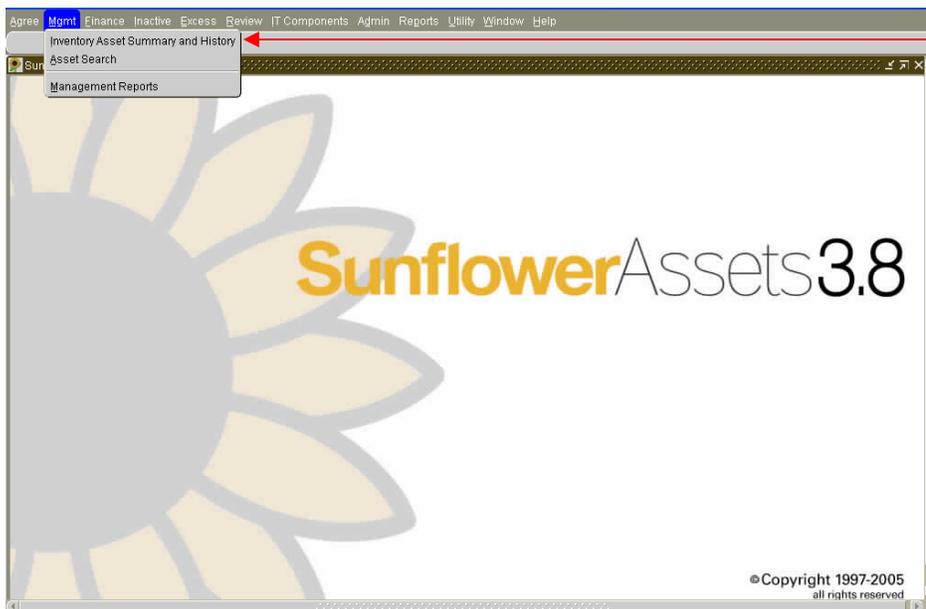
Final Event Type:

- CAPITAL THRESHOLD WRITE OFF
- DECAPITALIZE ITEM
- LATE LEGACY LOAD FINAL
- LOST WRITE OFF
- OTHER
- RETURNED TO VENDOR
- SALE OF BUSINESS COMPONENT
- SCRAPPED/CANNIBALIZED
- SOLD - OTHER
- SOLD - SEALED BID
- STOLEN
- TRADE OUT
- TRANSFER OUT - GOVERNMENT
- TRANSFER OUT - GRANT

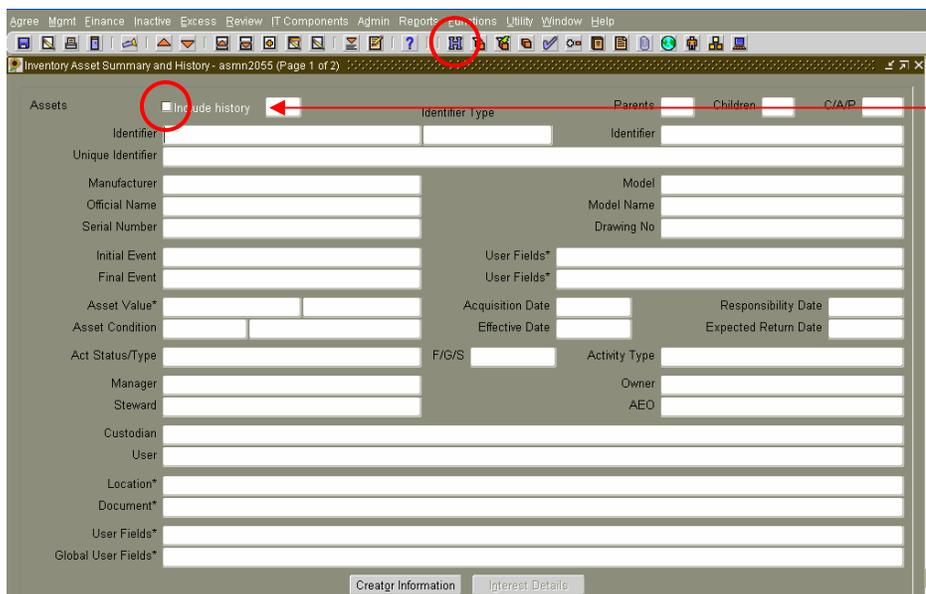
There can be a Final Event for an asset. This event recognizes the final disposition or "retirement" of the asset from a physical and financial accountability perspective. Proper disposal of an asset is subject to regulations.

Sunflower Training (Step-By-Step)

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)

Assets Include history Identifier Type Parents Children C/A/P

Identifier 381771 Identifier

Unique Identifier

Manufacturer Model

Official Name Model Name

Serial Number Drawing No

Initial Event User Fields*

Final Event User Fields*

Asset Value* Acquisition Date Responsibility Date

Asset Condition Effective Date Expected Return Date

Act Status/Type F/G/S Activity Type

Manager Owner

Steward AEO

Custodian

User

Location*

Document*

User Fields*

Global User Fields*

Creatr Information Interest Details

The tracking identifier assigned to the interest asset

Record: 1/1

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

Assets Include history Identifier Type Parents 0 Children 0 C/A/P C

Identifier 381771 Identifier 381771

Unique Identifier

Manufacturer YASHAW SCIENTIFIC Model H38600|CRYOSTAT

Official Name CRYOSTAT Model Name

Serial Number 666 Drawing No

Initial Event CONVERTED CAPITAL ITEM FROM EAS User Fields*

Final Event User Fields*

Asset Value* \$14,437.00 CAPITALIZED Acquisition Date 01/22/1999 Responsibility Date 01/22/1999

Asset Condition UNK UNKNOWN Effective Date 10/20/2006 Expected Return Date

Act Status/Type IN SERVICE F/G/S NNN Activity Type

Manager HOSPITAL Owner UAB

Steward 705401000:LABS-HOSPITAL AEO POLHILL SHERRY R 1025232

Custodian

User

Location* ON CAMPUS__BUILDING__NP__ROOM__6338

Document*

User Fields*

Global User Fields* FRONT_NONGRANT

Creatr Information Interest Details

The tracking identifier assigned to the interest asset

Record: 1/1

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

Λv - **Press** the up or down arrow key to view previous or later records

Λ - **Press** the up arrow key to look at later records

Sunflower Training (Step-By-Step)

Assets Include history **v** Identifier Type Parents 0 Children 0 C/A/P C

Identifier 381771 Identifier 381771

Unique Identifier

Manufacturer VASHAW SCIENTIFIC Model H38600|CRYOSTAT

Official Name CRYOSTAT Model Name

Serial Number 666 Drawing No

Initial Event CONVERTED CAPITAL ITEM FROM EAS User Fields*

Final Event User Fields*

Asset Value* \$14,437.00 CAPITALIZED Acquisition Date 01/22/1999 Responsibility Date 01/22/1999

Asset Condition UNK UNKNOWN Effective Date 09/26/2006 Expected Return Date

Act Status/Type TEMPORARILY MISPLACED F/G/S NNN Activity Type

Manager HOSPITAL Owner UAB

Steward 705401000:LABS-HOSPITAL AEO POLHILL SHERRY R 1025232

Custodian

User

Location* ON CAMPUS_BUILDING_NP_ROOM_6338

Document*

User Fields*

Global User Fields* FRONT_NONGRANT

Creater Information Interest Details

The unique identifier assigned to an asset
Record: 1/1

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

Inventory Asset Summary and History - asrm2055 (Page 1 of 2)

Assets Include history Identifier Type Parents 0 Children 0 C/A/P C

Identifier 381771 Identifier 381771

Unique Identifier

Manufacturer VASHAW SCIENTIFIC Model H38600|CRYOSTAT

Official Name CRYOSTAT Model Name

Serial Number 666 Drawing No

Initial Event CONVERTED CAPITAL ITEM FROM EAS User Fields*

Final Event User Fields*

Asset Value* \$14,437.00 CAPITALIZED Acquisition Date 01/22/1999 Responsibility Date 01/22/1999

Asset Condition UNK UNKNOWWN Effective Date 10/20/2006 Expected Return Date

Act Status/Type **IN SERVICE** F/G/S NNN Activity Type

Manager HOSPITAL Owner UAB

Steward 705401000.LABS-HOSPITAL AEO POLHILL SHERRY R 1025232

Custodian

User

Location* ON CAMPUS _BUILDING _NP _ROOM _6338

Document*

User Fields*

Global User Fields* FRONT_NONGRANT

Creatgr Information Interest Details

Record: 1/1

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.

Inventory Asset Summary and History - asrm2055 (Page 1 of 2)

Assets Include history Identifier Type Parents 0 Children 0 C/A/P C

Identifier 381771 Identifier 381771

Unique Identifier

Manufacturer VASHAW SCIENTIFIC Model H38600|CRYOSTAT

Official Name CRYOSTAT Model Name

Serial Number 666 Drawing No

Initial Event CONVERTED CAPITAL ITEM FROM EAS User Fields*

Final Event User Fields*

Asset Value* \$14,437.00 CAPITALIZED Acquisition Date 01/22/1999 Responsibility Date 01/22/1999

Asset Condition UNK UNKNOWWN Effective Date 09/26/2006 Expected Return Date

Act Status/Type **TEMPORARILY MISPLACED** F/G/S NNN Activity Type

Manager HOSPITAL Owner UAB

Steward 705401000.LABS-HOSPITAL AEO POLHILL SHERRY R 1025232

Custodian

User

Location* ON CAMPUS _BUILDING _JT _ROOM _J725

Document*

User Fields*

Global User Fields* FRONT_NONGRANT

Creatgr Information Interest Details

Record: 1/1

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)

Inventory Asset Summary and History - asnm2055 (Page 1 of 2)

Assets

Include history Identifier Type Parents 0 Children 0 C/A/P C

Identifier 381771 Identifier 381771

Unique Identifier

Manufacturer VASHAW SCIENTIFIC Model H38600|CRYOSTAT

Official Name CRYOSTAT Model Name

Serial Number 666 Drawing No

Initial Event CONVERTED CAPITAL ITEM FROM EAS User Fields*

Final Event User Fields*

Asset Value* \$14,437.00 CAPITALIZED Acquisition Date 01/22/1999 Responsibility Date 01/22/1999

Asset Condition UNK UNKNOWN Effective Date 12/31/2005 Expected Return Date

Act Status/Type IN SERVICE F/G/S NNN Activity Type

Manager HOSPITAL Owner UAB

Steward 705401000.LABS-HOSPITAL AEO POLHILL SHERRY R 1025232

Custodian

User

Location* ON CAMPUS _BUILDING _JT _ROOM _J725

Document*

User Fields*

Global User Fields* FRONT_NONGRANT

Creatgr Information Interest Details

Record: 1/1

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.

Lookup Inventory Asset Resolutions - asr2110

Assets

Identifier 381771 Model H38600|CRYOSTAT

Manufacturer VASHAW SCIENTIFIC Model Name

Official Name CRYOSTAT

Resolutions

Resolution Type **ONLINE PHYSICAL** Datetime 10/20/2006 10:08:59

Location ON CAMPUS _BUILDING _NP _ROOM _6338

Recorded By 1030061 Last Name RUDOLPH First JESSE Mid A

Review Campaigns

Review Campaign	Begin Date	End Date
FY2007-2008 PHYSICAL INVENTORY	10/01/2006	
FY2005-2006 PHYSICAL INVENTORY	10/01/2004	

The tracking identifier assigned to the interest asset

Record: 1/1

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)

Maintain Valid Resolution Types - asrv2030

Review Campaigns

Name: FY2007-2008 PHYSICAL INVENTORY
 Sponsor: 113601000: EQUIPMENT ACCOUNTING

Actual End Date

Valid Resolution Types

Accept from:

Resolution Type	Spon	Stew	Cust	User	Any	Rank	Sort	Begin Date	End Date
BARCODE SCAN	Y	Y	Y	Y	Y	1	1	10/01/2006	
BARCODE KEY	Y	Y	Y	Y	Y	1	1	10/01/2006	
ONLINE PHYSICAL	Y	Y	Y	Y	Y	1	1	10/01/2006	
INVENTORY ASSET INITIAL EVENT	Y	Y	Y	Y	Y	1	1	10/01/2006	
INVENTORY ASSET IDENTIFIER CHANG	Y	Y	Y	Y	Y	1	1	10/01/2006	
EXCESS ASSET INITIAL EVENT	Y	Y	Y	Y	Y	1	1	10/01/2006	
EXCESS ASSET IDENTIFIER CHANGE	Y	Y	Y	Y	Y	1	1	10/01/2006	
CHANGE LOCATION	Y	Y	Y	Y	Y	1	1	10/01/2006	
CHANGE STEWARD	Y	Y	Y	Y	Y	1	1	10/01/2006	10/12/2006
TRANSFER UNIV TO HOSP	Y	Y	Y	Y	Y	1	1	10/01/2006	
TRANSFER HOSP TO UNIV	Y	Y	Y	Y	Y	1	1	10/01/2006	
REVERSE WRITE OFF	Y	Y	Y	Y	Y	1	1	10/01/2006	

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

Additional Sunflower Concepts: Comments

Inventory Asset Summary and History - asrm2055 (Page 1 of 2)

Assets

Include history

Identifier Type

Parents 0 Children 0 C/AP C

Identifier 318153 Identifier 318153

Unique Identifier

Manufacturer REICHERT JUNG Model LYNX EMIIPROCESSOR: TISSUE

Official Name PROCESSOR Model Name

Serial Number L00501 Drawing No

Initial Event CONVERTED CAPITAL ITEM FROM EAS User Fields*

Final Event User Fields*

Asset Value* \$8,825.25 CAPITALIZED Acquisition Date 05/13/1991 Responsibility Date 05/13/1991

Asset Condition UNK UNKNOWN Effective Date 09/26/2006 Expected Return Date

Act Status/Type TEMPORARILY MISPLACED F/G/S NNN Activity Type

Manager UNIVERSITY Owner UAB

Steward 392301000: MOLECULAR & CELLULAR PATHOI AEO RODEN LYNNE C 1013750

Custodian

User

Location* ON CAMPUS_BUILDING_VH_ROOM_B003B2

Document*

User Fields*

Global User Fields* LEFT_NONGRANT

Creater Information Interest Details

The tracking identifier assigned to the interest asset

Record: 1/1

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.

Sunflower Training (Step-By-Step)

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.

Sunflower Training (Step-By-Step)

Accessing Asset Information by Steward Org

Query Criteria - asut0050

Assigned To Requested

Steward [] AEO []

Custodian [] Last Name [] First [] Mid []

User [] Last Name* [] First [] Mid []

Agreement Identifier [] Type []

Site []

Structure Level 1 [] Structure Level 2 []

Manufacturer [] Model []

Official Name [] Serial Number []

Interest Type [] Identifier []

Unique Identifier []

Initial Event []

User Fields* []

Interest Type: Agreement Excess Financial Inactive Inventory Subset

User Fields* []

Global User Fields* []

Last Criteria Execute Cancel

The Query Criteria screen appears. **Click** in the Steward field. When the three dots appear (the "ellipsis"), **click** on this button. An LOV will appear 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 (...)

Query Criteria - asut0050

Assigned To Requested

Steward [] AEO []

Custodian [] Last Name [] First [] Mid []

User [] Last Name* [] First [] Mid []

Agreement Identifier [] Type []

Site []

Structure Level 1 [] Structure Level 2 []

Manufacturer [] Model []

Official Name [] Serial Number []

Interest Type [] Identifier []

Unique Identifier []

Initial Event []

User Fields* []

Interest Type: Agreement Excess Financial Inactive Inventory Subset

User Fields* []

Global User Fields* []

Last Criteria Execute Cancel

Organizations

Find % []

Steward

311402600.MED-NEPHROLOGY

311402800.MED-PULMONARY/ALLERGY/CRITICAL ...

311403000.MED-IMMUNOLOGY/RHEUMATOLOGY

311403200.MED-DEVEL & CLINICAL IMMUNOLOGY

311403400.MED-GEOGRAPHIC MEDICINE

311403600.MED-DIVISION OF HUMAN GENE THERA...

311403800.MED-GENETIC & TRANSLATIONAL MED

311450000.MONTGOMERY INTERNAL MEDICINE

311500000.NEUROLOGY CHAIR OFFICE

311502000.ALZHEIMER'S DISEASE CENTER

Find OK Cancel

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.

Note: 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)

Query Criteria - asut0050

Assigned To: Requested

Steward: 311403200.MED-DEVEL & CLINICAL IMMUN... AEO: _____

Custodian: _____ Last Name*: _____ First: _____ Mid: _____

User: _____ Last Name*: _____ First: _____ Mid: _____

Agreement Identifier: _____ Type: _____

Site: _____

Structure Level 1: _____ Structure Level 2: _____

Manufacturer: _____ Model: _____

Official Name: _____ Serial Number: _____

Interest Type: _____ Identifier: _____

Unique Identifier: _____

Initial Event: _____

User Fields*: _____

Interest Type: Agreement Excess Financial Inactive Inventory Subset

User Fields*: _____

Global User Fields*: _____

Last Criteria Execute Cancel

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

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets: Include history Identifier Type: _____ Parents: 0 Children: 0 C/A/P: C

Identifier: 269884 Identifier: 269884

Unique Identifier: _____

Manufacturer: BECKMAN INSTRUMENTS Model: J6-BIJCENRIFUGE

Official Name: CENTRIFUGE Model Name: _____

Serial Number: _____ Drawing No: _____

Initial Event: CONVERTED CAPITAL ITEM FROM EAS User Fields*: _____

Final Event: _____ User Fields*: _____

Asset Value*: \$12,947.48 CAPITALIZED Acquisition Date: 01/13/1984 Responsibility Date: 01/13/1984

Asset Condition: UNK UNKNOWN Effective Date: 11/02/2006 Expected Return Date: _____

Act Status/Type: IN SERVICE F/G/S: NNN Activity Type: _____

Manager: UNIVERSITY Owner: UAB

Steward: 311403200.MED-DEVEL & CLINICAL IMMUNOL AEO: MASON MARY J 1005732

Custodian: _____

User: _____

Location*: ON CAMPUS_BUILDING_SHEL_ROOM_471D

Document*: _____

User Fields*: _____

Global User Fields*: FRONT_SRANT_020942_10/12/2006

Creatgr Information Interest Details

Record: 1/7

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.

Sunflower Training (Step-By-Step)

Accessing Asset Information by Manufacturer

Query Criteria - asut0090

Assigned To Requested

Steward _____ AEO _____

Custodian _____ Last Name* _____ First _____ Mid _____

User _____ Last Name* _____ First _____ Mid _____

Agreement Identifier _____ Type _____

Site _____

Structure Level 1 _____ Structure Level 2 _____

Manufacturer _____ Model _____

Official Name _____ Serial Number _____

Interest Type _____ Identifier _____

Unique Identifier _____

Initial Event _____

User Fields* _____

Interest Type: Agreement Excess Financial Inactive Inventory Subset

User Fields* _____

Global User Fields* _____

Last Criteria Execute Cancel

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.

Organizations

Find % _____

Manufacturer

- 3COM CORPORATION
- 3M
- A PLUS
- A T & T**
- A&D COMPANY LTD.
- A. DAIGGER & CO.
- A. R. VETTER CO.
- A.E.S., INC.
- A.M.ELECTRONICS
- A.M.P.I.
- AA ENGINEERING

Find OK Cancel

AEO _____

First _____ Mid _____

First _____ Mid _____

Type _____

Structure Level 2 _____

Model _____

Serial Number _____

Identifier _____

Initial Event _____

User Fields* _____

Interest Type: Agreement Excess Financial Inactive Inventory Subset

User Fields* _____

Global User Fields* _____

Last Criteria Execute Cancel

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

Sunflower Training (Step-By-Step)

Query Criteria - asut0050

Assigned To Requested

Steward _____ AEO _____

Custodian _____ Last Name* _____ First _____ Mid _____

User _____ Last Name* _____ First _____ Mid _____

Agreement Identifier _____ Type _____

Site _____

Structure Level 1 _____ Structure Level 2 _____

Manufacturer **AT & T** Model _____

Official Name _____ Serial Number _____

Interest Type _____ Identifier _____

Unique Identifier _____

Initial Event _____

User Fields* _____

Interest Type: Agreement Excess Financial Inactive Inventory Subset

User Fields* _____

Global User Fields* _____

Last Criteria Execute Cancel

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

Maintain Inventory Assets - asmn2010 (Page 1 of 2)

Inventory Assets	Type	Existing interest asset	Type	Identifier	Released?	Y
Identifier	03662993					
Unique Identifier						
Catalog Identifier*	169052	<input type="checkbox"/> Commodity Asset	Parents	0	Children	0
Manufacturer	A T & T		Model	3610	C/A/P	C
Official Name	COMPUTER NETWORKING EQUIPMENT		Model Name			
Serial Number			Drawing No			
Initial Event	CONVERTED MEMO ITEM FROM EAS		User Fields*	UAB-OWNED MEMO ITEM		
Asset Value*	\$2,987.71	Acquisition Date	05/28/1993	Responsibility Date	05/28/1993	
Asset Condition	UNK UNK-UNKNOWN	Effective Date	01/03/2006	Expected Return Date		
Activity Status	IN SERVICE	F/G/S*	FNN	Activity Type		
Manager	UNIVERSITY	Owner	UAB			
Steward	311401600-MED-PREVENTIVE MEDICINE	Accepted?	Y	AEO	MCCAMPBELL SUZANNE B 1022367	
Custodian		Last Name*		First		Mid
User		Last Name*		First		Mid
Location*	ON CAMPUS_BUILDING_MT_ROOM_502					
Document*						
User Fields*						
Global User Fields*	INPROC_GRANT					

Page 2 Commodity Comment Re-Request

Record: 1/2

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.

Sunflower Training (Step-By-Step)

Accessing Asset Information by Model

The screenshot shows the 'Query Criteria' window for 'asut0050'. It features a menu bar (Action, Edit, Query, Block, Record, Field, Lookup, Help, Window) and a toolbar. The main area is divided into sections for user selection (Assigned To/Requested), Agreement Identifier, Site, Structure Level 1, Structure Level 2, Manufacturer, Official Name, Interest Type, and Unique Identifier. The 'Model' field under 'Structure Level 2' is circled in red. Below these fields are 'Initial Event', 'User Fields*', 'Interest Type' (with radio buttons for Agreement, Excess, Financial, Inactive, Inventory, Subset), and 'Global User Fields*'. At the bottom are 'Last Criteria', 'Execute', and 'Cancel' buttons.

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

This screenshot is identical to the previous one, but the 'Model' field now contains the text 'DIMENSION'. The 'Execute' button at the bottom is circled in red.

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)

Inventory Assets

Identifier: 357456 Existing interest asset

Unique Identifier

Catalog Identifier: 198438 Commodity Asset Parents: 0 Children: 0 C/A/P: C

Manufacturer: DELL COMPUTER CORP. Model: DIMENSION

Official Name: COMPUTER Model Name

Serial Number: J7S700B Drawing No

Initial Event: CONVERTED CAPITAL ITEM FROM EAS User Fields*

Asset Value*: \$5,327.75 Acquisition Date: 05/16/2000 Responsibility Date: 05/16/2000

Asset Condition: UNK UNKNOWN Effective Date: 01/03/2006 Expected Return Date

Activity Status: IN SERVICE F/G/S*: NNN Activity Type

Manager: UNIVERSITY Owner: UAB

Steward: 465000000.PSYCHOLOGY Accepted?: Y AEO: ALSTON JAMES M 1019480

Custodian Last Name* First Mid

User Last Name* First Mid

Location*: ON CAMPUS_BUILDING_CH_ROOM_159

Document*

User Fields*

Global User Fields*: FRONT_NONGRANT

Page 2 Commodity Comment Re-Request

the tracking Identifier assigned to the interest asset
Record: 1/5

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

Action Edit Query Block Record Field Lookup Help Window

Query Criteria - asut0050

Assigned To Requested

Steward AEO

Custodian Last Name* First Mid

User Last Name* First Mid

Agreement Identifier Type

Site

Structure Level 1 Structure Level 2

Manufacturer Model

Official Name Serial Number

Interest Type Identifier

Unique Identifier

Initial Event

User Fields*

Interest Type: Agreement Excess Financial Inactive Inventory Subset

User Fields*

Global User Fields*

Last Criteria Execute Cancel

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

Sunflower Training (Step-By-Step)

Query Criteria - asult0050

Assigned To Requested

Steward AEO

Custodian Last Name* First Mid

User Last Name* First Mid

Agreement Identifier Type

Site

Structure Level 1 Structure Level 2

Manufacturer Model

Official Name Serial Number Identifier

Interest Type Interest Type

Unique Identifier

Initial Event

User Fields*

Interest Type: Agreement Excess Financial Inactive Inventory Subset

User Fields*

Global User Fields*

Last Criteria **Execute** Cancel

Enter value for Serial Number

Record: 1/1

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

Note: 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.

Inventory Asset Summary and History - asmn2055 (Page 1 of 2)

Assets Include history Identifier Type Parents Children C/A/P

Identifier Identifier

Unique Identifier

Manufacturer Model

Official Name Model Name

Serial Number Drawing No

Initial Event User Fields*

Final Event User Fields*

Asset Value* CAPITALIZED Acquisition Date Responsibility Date

Asset Condition UNKNOWN Effective Date Expected Return Date

Act Status/Type F/G/S Activity Type

Manager Owner

Steward AEO

Custodian

User

Location*

Document*

User Fields*

Global User Fields*

Creatgr Information Interest Details

The asset event type's long name, e.g. PURCHASE, TRANSFER

Record: 1/1

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

Sunflower Training (Step-By-Step)

The screenshot shows the 'Query Criteria' dialog box in Sunflower. It has a menu bar (Action, Edit, Query, Block, Record, Field, Lookup, Help, Window) and a toolbar. The dialog is titled 'Query Criteria - asut0050'. It contains several sections of input fields:

- Assigned To / Requested:** Steward, Custodian, User, Last Name*, First, Mid, AEO, First, Mid.
- Agreement Information:** Agreement Identifier, Type, Site, Structure Level 1, Structure Level 2, Manufacturer, Model, Official Name, Serial Number, Interest Type, Identifier, Unique Identifier.
- Event Information:** Initial Event, User Fields*, Interest Type (radio buttons: Agreement, Excess, Financial, Inactive, Inventory, Subset), User Fields*, Global User Fields*.

Buttons at the bottom: Last Criteria, Execute, Cancel.

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.

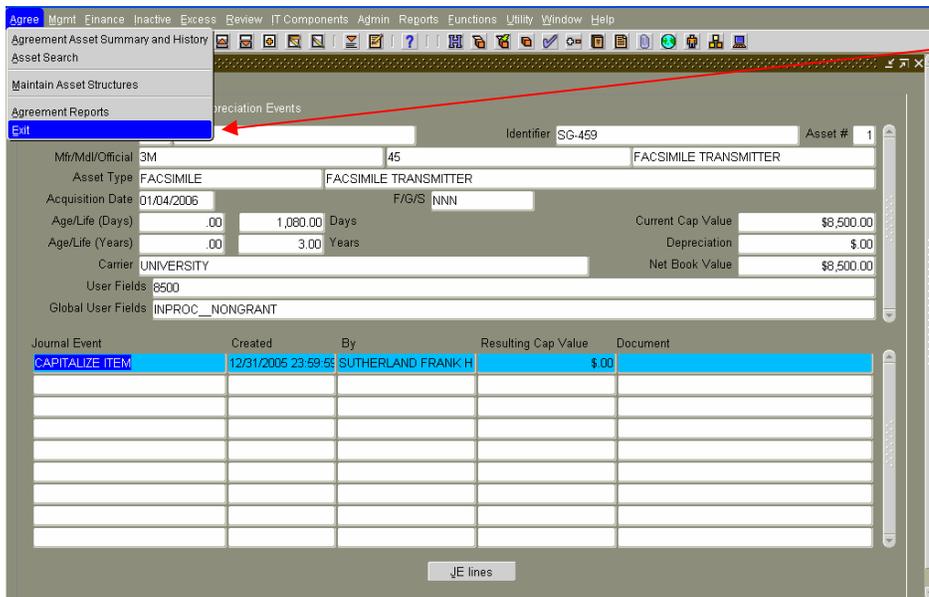
The screenshot shows the 'Journal Event History' screen in Sunflower. The menu bar includes: Agree, Mgmt, Finance, Inactive, Excess, Review, IT Components, Admin, Reports, Functions, Utility, Window, Help. The title bar is 'Journal Event History - asac2050'. The screen displays asset information for 'FIN SG-459' (Asset # 1) and a table of journal events.

Journal Event	Created	By	Resulting Cap Value	Document
CAPITALIZE ITEM	12/31/2005 23:59:59	SUTHERLAND FRANK H	\$0.00	

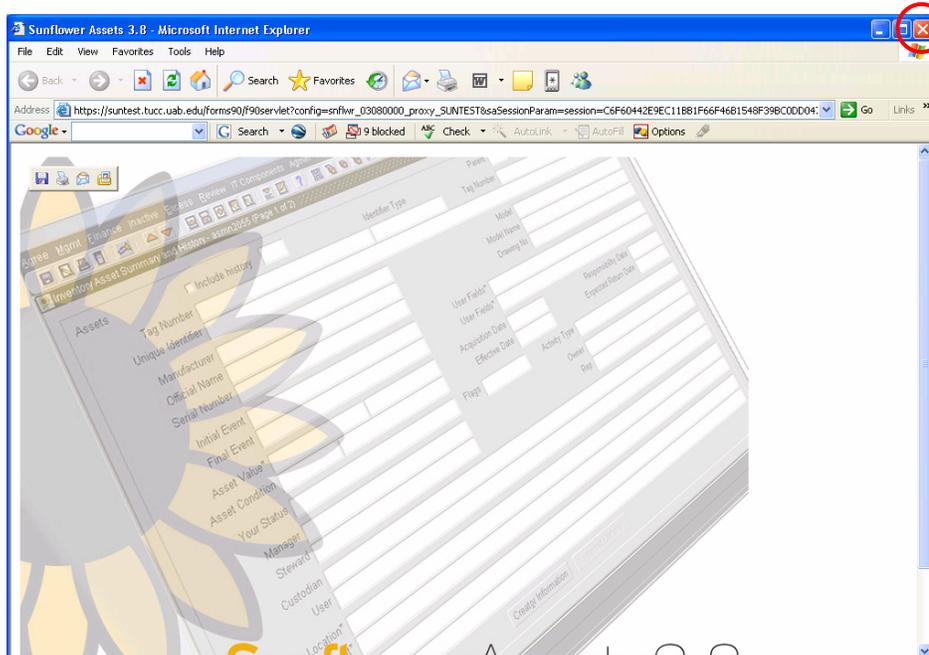
Buttons at the bottom: JE lines

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.

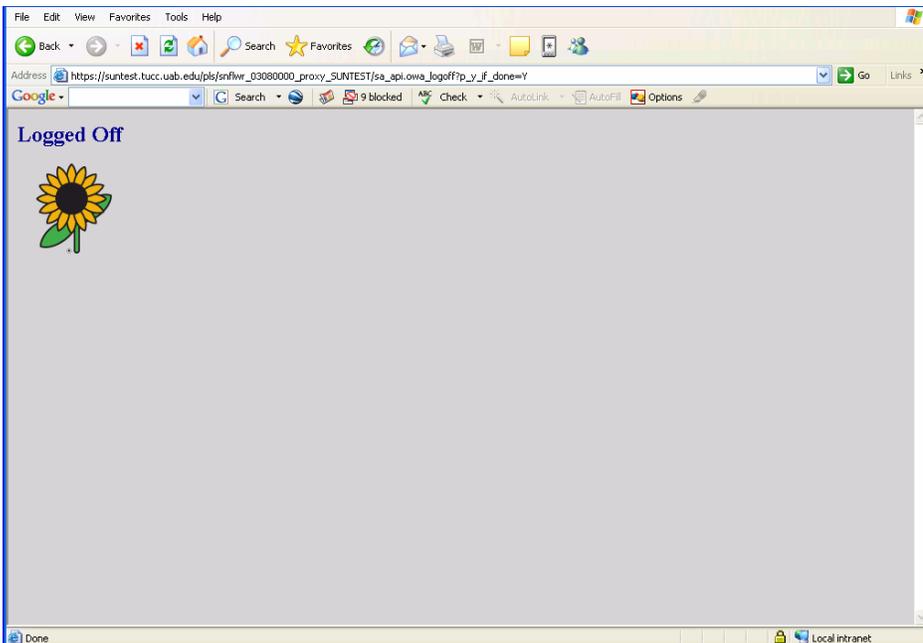


Initially, the screen that you were in closes. Then click on the X in the upper right corner.

Sunflower Training (Step-By-Step)



Now, **click** on Logoff.



This screen confirms that you have logged off from the Sunflower System.