



# USER INTERFACE

**T**he *User Interface* chapter explains how to use Sunflower forms to manage assets as well as the toolbar, menus and the online help tools.

## KEY CONCEPTS

This chapter will include the following discussion points and concepts:

- Access Sunflower Enterprise
- Navigation
- System Concepts
- Search Techniques
- Wildcard Searches
- Define Complex Fields
- Get Help
- Error Management

## ACCESS SUNFLOWER ENTERPRISE

This section describes how to access the Sunflower application. The following steps guide users through the login process.

### NAVIGATION

- Launch Internet Explorer
- Enter the Sunflower application web address, or...
- Select the appropriate shortcut from the Favorites menu, or...
- If available, double-click the Sunflower icon on the desktop



**Step 1.** Launch the Sunflower application.

A screenshot of the Sunflower Enterprise login page. The page header displays the "Sunflower Enterprise" logo and the text "Sunflower Enterprise - Production 5.0.0.0". Below the header is a blue instruction bar that reads: "To log into Sunflower Enterprise, enter your username and password below and press the 'login' button." Underneath this bar are two input fields: "Username" with the placeholder text "MY USERNAME" and "Password" with masked characters "\*\*\*\*\*". At the bottom of the form are two buttons: "Login" and "Cancel".

**Step 2.** Enter the unique **Username**.

**Step 3.** Enter the appropriate **Password**.

**Step 4.** Click the **Login** button. The Sunflower Enterprise Main Menu displays.

## SUNFLOWER ENTERPRISE MAIN MENU



**Step 5.** Select a hyperlink to access the appropriate area of Sunflower.

NOTE: The following example is based on clicking the **Sunflower Enterprise Forms** hyperlink.

| OPTION   | DEFINITION   |
|--|--|
| <b>Sunflower Enterprise Forms</b>                  | Accesses the Sunflower graphical user interface (GUI) forms.                                       |
| <b>Sunflower Enterprise Reports</b>                | Accesses the Sunflower reporting main menu pages.  |
| <b>Sunflower Enterprise HTML Transaction Pages</b> | Accesses the Sunflower HTML Web transactions pages.  |
| <b>Search Attachments and Contracts</b>            | Allows users to search for comments and attachments associated with contracts, assets and reports. |
| <b>Sunflower Real Property Forms</b>               | Accesses the Sunflower Real Property graphical user interface (GUI) forms.                         |
| <b>Sunflower Real Property Reports</b>             | Accesses the Sunflower Real Property reporting main menu page.                                     |
| <b>Logoff</b>                                      | Used to Exit from Sunflower Enterprise.  |

## NAVIGATION

The following section explains how to navigate the menus and forms within Sunflower Enterprise.

### SUNFLOWER MENUS

Each Sunflower module has a corresponding pull-down menu where users will navigate to perform most of their day-to-day tasks. Five of the menu selection items, **Agree**, **Mgmt**, **Finance**, **Inactive**, and **Excess** are known as **Interest Asset** modules.

NOTE: The **Functions** menu is only available when users have a form (screen, window, etc.) open.



| PULL-DOWN MENU       | FUNCTION  |
|----------------------|---|
| <b>Exit</b>          | Click Exit to close the Sunflower application.  |
| <b>Agree</b>         | Manage assets associated with contracts, agreements, leases, warranties, property passes, and external contract related loans.  |
| <b>Contract</b>      | Maintain Government related Contract Reports and manage the Unique Item Identifier (UII) feature.   |
| <b>Mgmt</b>          | Record and maintain inventory management assets. (Typical day-to-day asset management).   |
| <b>Maintenance</b>   | Manage preventative maintenance schedules, record emergency maintenance transactions and keep track of calibration status.  |
| <b>Sentry</b>        | Check-Out, Check-In, Put Away, and Transfer selected sensitive assets, if installed.  |
| <b>Finance</b>       | Manage the financial aspects of capitalized assets, such as the set up of journal entries for periodic cost and depreciation events.  |
| <b>Inactive</b>      | Manage assets under storage, held for future use, repair, calibration, and/or acceptance.   |
| <b>Excess</b>        | Manage assets during the retirement process. Implement screening periods and lotting processes.   |
| <b>Review</b>        | Define and manage the physical inventory process.   |
| <b>IT Components</b> | Manage IT asset components that do not get tracked as individual assets but as subcomponents of an asset (i.e. software, hardware, license keys, etc.).   |
| <b>Configuration</b> | Create, manage and track asset configurations.  |
| <b>Admin</b>         | Define and manage application, organization and end user properties. Perform system setup and maintenance.  |
| <b>Reports</b>       | Generate reports related to each phase of the asset lifecycle.  |
| <b>Utility</b>       | Provides another method of performing the various Sunflower Enterprise functions. Use the mouse, keyboard (hot keys) or the Functions menu. Note: Functions are only available when a form is open. |
| <b>Window</b>        | Cascade, tile window vertically or horizontally, or identify the form currently being worked in.  |
| <b>Help</b>          | Access Sunflower's on-line help.  |

## SUNFLOWER FORMS

Sunflower is designed to operate in a Web-enabled environment. The *window* (screen, page, panel, etc.) is commonly referred to as a **form**. Other common terms are discussed below.

### NAVIGATION

- Click Mgmt
- Click Inventory Asset Summary and History

**Step 1.** Click **Mgmt** from the Menu Bar.

**Step 2.** Select **Inventory Asset Summary and History** from the pull-down menu (or submenu).

NOTE: The **Mgmt** submenu provides a list of menu items that pertain strictly to the Inventory Management module; however, while navigating from module to module, users will see that many of the submenus are the same. The **Title Bar** displays for each form and includes the form name and which page is being viewed. As a rule-of-thumb, use the **Maintain** menu items to actively edit forms and the **Summary & History** menu for viewing only.

NOTE: Notice that once a form is opened, the **Tool Bar** icons display below the **Menu Bar** and that the **Functions** pull-down menu is also available. Rest the mouse pointer over any icon to view a hint for the icon's function. Hints display in the lower left-hand corner, on the **Status Bar**.

## KEY TERMS AND DEFINITIONS

| TERM       | DEFINITION   |
|------------|--|
| Button     | A graphic element that initiates a pre-defined action when clicked (i.e. Get Records, Timeline Report, etc.).  |
| Check Box  | Allows for the selection (checking) of a single or multiple options.   |
| Field      | An area within a window (form) that displays data or allows users to enter/update data.  |
| Menu Bar   | A pull-down list of menus used to navigate to other forms or perform actions within a form.  |
| Region     | A logical grouping of fields set apart from other fields by a box outline or a tabular area.   |
| Region Tab | A collection of regions that occupy the same space in a window where only one region can be displayed at a time.   |
| Status Bar | Displays status and other information related to form processing. Works in conjunction with the “Tool Tips” “Bubble.”  |
| Title Bar  | Indicates the name of the form, pertinent context information and page information (i.e. Page 1 of 2, etc.).   |
| Tool Bar   | Contains the icons, which are used to perform actions within a form or navigate to other associated forms.   |
| Tool Tips  | “Bubble” help information created by resting the mouse over the top of an icon or button. Also used to determine the function of an icon or button on the toolbar or form.                   |
| Window     | A form. An area where the user interacts with the Sunflower application. Often multiple windows can be open at one time, allowing users to perform data entry and/or data search activities. |

## KEY ELEMENTS OF SUNFLOWER FORMS

Sunflower forms comprise of the following elements:

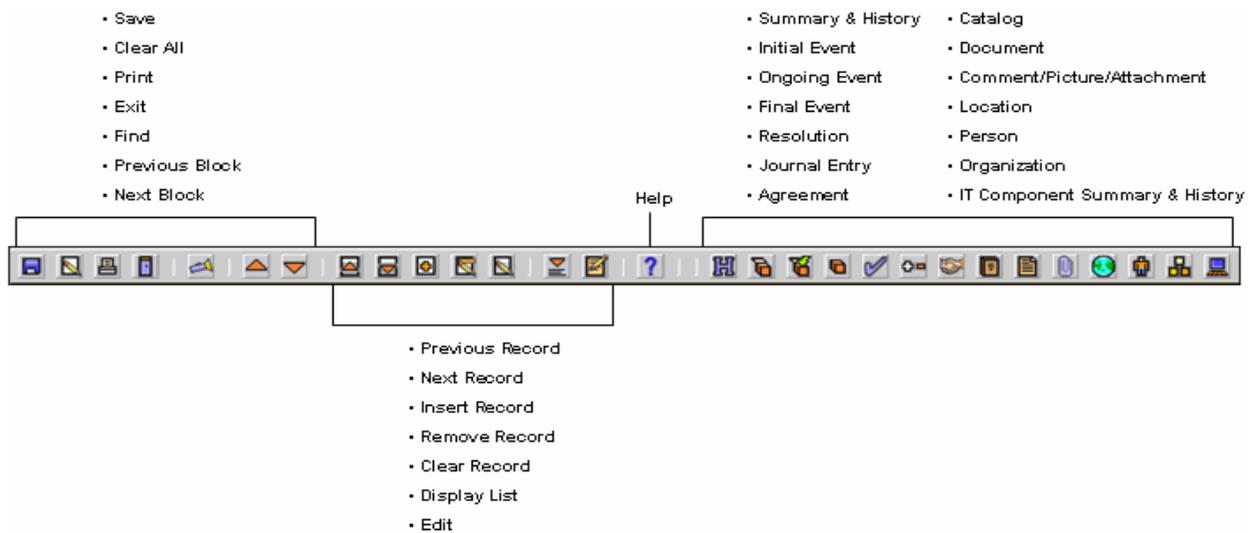
The screenshot shows the 'Inventory Assets' form in the Sunflower Enterprise software. The form is divided into several sections: 'Inventory Assets' (top left), 'Other Identifiers (0)' (top right), and 'User Fields\*' (middle right). The 'Identifier\*' field is highlighted in yellow, and a red arrow points to it from a box labeled '4'. Other red arrows point to the menu bar (1), toolbar (2), title bar (3), and status bar (5). The status bar at the bottom displays the message: 'The tracking identifier assigned to the interest asset' and 'Record: 1/1'.

| NUMBER | TERM                  | DEFINITION  |
|--------|-----------------------|---|
| 1      | <b>Menu Bar</b>       | Categorical areas that have pull-down menus where users will navigate to perform most of their day-to-day tasks.  |
| 2      | <b>Tool Bar</b>       | A collection of iconic buttons (icons) that perform specific actions when selected.   |
| 3      | <b>Title Bar</b>      | The name of the displayed form.   |
| 4      | <b>Required Field</b> | A yellow highlighted field indicates that the field is required. Required fields must be entered or the form will not Save.                                 |
| 5      | <b>Status Bar</b>     | Displays status and other information related to form processing such as hints, number of records processed, and confirmation that records have been saved. |

## TOOLBAR OVERVIEW

The toolbar is a collection of iconic buttons (icons) that perform specific actions when selected. Each toolbar icon replicates a menu bar action. Depending on the context of the current field or form, a toolbar icon will be active or inactive.

Display help (a Tool Tip) for an icon, by placing the mouse over the top of the icon.



TOOLBAR ICONS

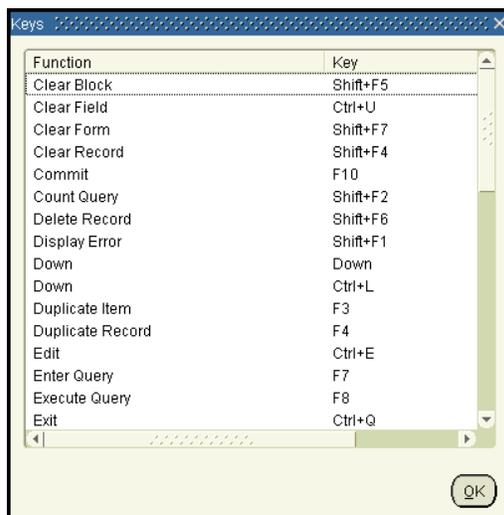
|                 |   |   |                          |   |                                  |
|-----------------|---|---|--------------------------|---|----------------------------------|
| Save            |    |    | Clear Record             |  | Configuration and Kitting        |
| Clear All       |    |    | Display List             |  | Catalog                          |
| Print           |    |    | Edit                     |  | Document                         |
| Exit            |    |    | Help                     |  | Comment/Picture/Attachment       |
| Find            |    |    | Summary & History        |  | Location                         |
| Previous Block  |    |    | Initial Event            |  | Person                           |
| Next Block      |    |    | Ongoing Event            |  | Organization                     |
| Previous Record |    |    | Final Event              |  | IT Component Summary and History |
| Next Record     |    |    | Resolution               |  | Lookup (Details icon)            |
| Insert Record   |   |   | Journal Entry            |   |                                  |
| Remove Record   |  |  | Agreement (if installed) |   |                                  |

## KEYBOARD SHORTCUTS (HOT KEYS)

Various keyboard shortcuts (hot keys) are available depending on the organization's server settings. Use the **Help** menu to view the specific keys available for an organization.

### NAVIGATION

- Click Help
- Click Keys



NOTE: Copy (Ctrl+C) and Paste (Ctrl+V) keyboard functions may also be available, based upon the operating system.

## SYSTEM CONCEPTS

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The following concepts provide a sound basis for good asset management business practices.

- **Location** – The place where an asset resides.
- **Catalog** – Provides a consistent nomenclature.
- **User Defined Fields (UDFs)** – Captures information that is pertinent to a specific asset.

Knowing where assets are located is always a priority. As a result, **Location** is an important system field that is used to assign the physical location of every asset stored in Sunflower. To provide consistency in vendor and part naming, the **Catalog** is used to create a set of distinct manufacturer and model combinations for all assets stored in the database. Additionally, **User Defined Fields (UDFs)** can be enabled to capture unique information about assets which are defined by policy and/or procedures employed by an organization.

## LOCATION

Location information is comprised of a group of fields that provide a granular view of an asset's exact location. Location is referred to as a *complex field* because it is a combination of multiple fields. The specification of a location helps with record management and the tracking of assets.

NOTE: Users must have the *Administrator* role to view the **Maintain Locations** form.

### NAVIGATION

- Click Admin
- Click Location
- Click Maintain Locations

Location information is comprised of the following primary fields:

| TERM                          | DEFINITION   |
|-------------------------------|--|
| <b>Site</b>                   | A Required field. The most basic location data for the asset (i.e. on-site, off-site, region, city, building name, office name, airport, etc.).<br>Note: Site entry is associated with and controls Structure Level 1 data availability.                                       |
| <b>Structure Level 1</b>      | An Optional field that provides specific details about a Site's location (i.e. Building, Lot, Baggage, Terminal, etc.) and, if applicable, the designation/number/name (i.e. A, B, C, 1, 2, 3, 28, 100, 05C, TCT, Kennedy Center, United, etc.) assigned to a particular Site. |
| <b>Structure Level 2</b>      | An Optional field that provides additional details about a Site's location, (i.e. Floor, Room or Area) and the designation (i.e. 15, 123, Receiving, Storage, Carousel, etc.) or an Area's type (i.e. Area A or Area B).   |
| <b>Mail Stop</b>              | An Optional field used to specify the mail stop for a location.  |
| <b>Structure Level 3 Name</b> | An Optional field that provides a free form text field used to specify additional details for Structure Level 2 such as a Bin, Palette, Cabinet, Vault, etc.<br>Note: If the Structure Level 2 field is blank, any Structure Level 3 data entered will not be saved.           |
| <b>GPS 1, 2, 3</b>            | Optional fields that provide specific Global Positioning System (GPS) location data.   |
| <b>Begin Date</b>             | The Date in which the location is valid. If left blank, the location will remain valid.  |
| <b>End Date</b>               | The Date in which the location becomes invalid. If left blank, the location will remain valid.   |

## CATALOG

The property catalog stores data common to an asset's **Manufacturer** and **Model** number. The catalog is based on the manufacturers' lists, and is updated as required to reflect new products. Having a well maintained catalog enables organizations to maintain a uniform way of entering manufacturer information quickly and precisely, especially when entering multiple assets. This standardization is important when running reports or queries to ensure search results are satisfactory.

### NAVIGATION

- Click <Interest Type> menu
- Click Maintain Catalog Entries

Maintain Catalog Entries - asmn0020 (Page 1 of 2)

Catalogs

Identifier  Reviewed?  Y Begin Date  End Date

Manufacturer\*

Model

Official Name

Model Name

Asset Type

Service Life (yrs)  Salvage Value

Override Service Life (yrs)  Override Salvage Value %

Replacement Value

Federal Supply Classification    ADP CENTRAL PROCESSING UNIT(CPU, COMPUTER), DIGITAL

Stock Number  UOM  Shelf Life?  Extensible?

User Fields\*

NOTE: Organizations have the option to make the **Official Name** entry only selectable from a list of values (pick list), that is based upon the organization's unique Property Management policy and procedures.

NOTE: The **Asset Type** field entry controls the default **Service Life (yrs)** field population.

## USER DEFINED FIELDS (UDFs)

User Defined Fields (UDFs) are “place holders,” used to define information that is unique to the organization. UDFs may include fields that contain a list of values, date entry or free text.

In the following illustrations notice how the **User Fields\*** display different field entry requirements, based upon the **Final Event** Type selection criteria used.

### NAVIGATION

- Click Mgmt
- Click Create Inventory Asset Final Events

The screenshot shows a web application window titled "Create Inventory Asset Final Events - asmn2080". The "Final Events" section has "Date" set to "09/07/2006" and "Final Event" set to "DISPOSED OF THROUGH PLANT CLEARANCE PROCESS". The "User Fields\*" section contains two fields: "Authorization" and "Disposal Site". The "Assets" section at the bottom has a table with columns "Identifier" and "Manufacturer / Model / Official Name\*", and a checkbox in the "Identifier" column.

### NAVIGATION

- Click Mgmt
- Click Create Inventory Asset Final Events

The screenshot shows the same web application window. The "Final Event" is now "TRANSFER". The "User Fields\*" section contains one field: "Organization", which has a list of values (LOV) indicator (three dots) at the end of the input field. The "Assets" section at the bottom is identical to the first screenshot.

NOTE: The Ellipsis (three dots) following the Organization field in the second illustration indicates that this field has a List of Values (LOV) available to assist with data entry.

## SEARCH TECHNIQUES

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Retrieving data from the database is key in order to maximize effectiveness when working in Sunflower. This section will discuss and illustrate the most common methods in which users can search for and retrieve data, which include:

- Use the Asset Search form (perform a simple search)
- Use the Query Criteria form
- Use the Maintain Inventory Assets form
- Use the Summary and History form



## QUERY FOR ASSETS

The **Query Criteria** form provides a way to enter additional data for a more detailed drill-down to view or work with specific assets. The **Query Criteria** form is unique in that it can be accessed from a variety of Sunflower main forms in which users want to search on assets and return the relative data.

### NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets
- Click Find

The screenshot shows the 'Query Criteria' form with the following fields and options:

- Assigned To / Requested:** Radio buttons for 'Assigned To' (selected) and 'Requested'.
  - Steward: [Text Field]
  - Rep: [Text Field]
  - Custodian: [Text Field]
  - Last Name\*: [Text Field]
  - First: [Text Field]
  - Mid: [Text Field]
  - User: [Text Field]
  - Last Name\*: [Text Field]
  - First: [Text Field]
  - Mid: [Text Field]
- Asset Details:**
  - Stock Number: [Text Field]
  - Agreement Identifier: [Text Field]
  - Site: [Text Field]
  - Structure Level 1: [Text Field]
  - Structure Level 2: [Text Field]
  - Manufacturer: [Text Field]
  - Model: [Text Field]
  - Official Name: [Text Field]
  - Serial Number: [Text Field]
  - Interest Type: [Text Field]
  - Barcode: [Text Field]
  - Unique Name: [Text Field]
- Status:** Radio buttons for 'Active' (selected), 'Retired', and 'Both'.
- Events and Fields:**
  - Initial Event: [Text Field]
  - User Fields\*: [Text Field]
  - Interest Type: Radio buttons for 'Agreement', 'Excess', 'Financial', 'Inactive', 'Inventory' (selected), 'Subset'.
  - User Fields\*: [Text Field]
  - Global User Fields\*: [Text Field]
  - Ongoing Event: [Text Field]
  - User Fields\*: [Text Field]
- Buttons:** 'Last Criteria', 'Execute', and 'Cancel'.

**Step 1.** Navigate to the **Maintain Inventory Assets** form.

**Step 2.** With the cursor in the **Identifier** field, click the **Find** icon.

**Step 3.** Enter the known *Search Criteria* in the appropriate fields.

**Step 4.** Click the **Execute** button.

**NOTE:** Users are automatically returned to the **Maintain Inventory Assets** form, which will be populated with the results of their query.

**NOTE:** The **Status Bar** (located on the bottom left-hand corner), displays the number of returned records based on the search criteria.

NOTE: If the Record indication indicates 1/?, select **Functions > Record > Last**. This will provide the total count of records returned. Select **Functions > Record > First** to return to the top or first record.

**NAVIGATION**

- Click the Next Record icon

The screenshot displays the 'Inventory Assets' form in the Sunflower Enterprise Assets application. The form includes fields for Identifier (0087547754016), Unique Name, Default Location, Catalog Identifier (1200), Manufacturer (JW BRUSHES), Official Name (BRUSH), Serial Number (455587), Initial Event (PURCHASE), Asset Value (\$00), Acquisition date (10/03/2012), Responsibility Date (10/03/2012), Asset Condition, Effective Date (10/07/2012), Expected Return Date, Activity Status (IN SERVICE), Manager (LE MANAGER), Steward (ANNAM'S ORG), Custodian (AKIT), Last Name (A), User, and Location (ARLINGTON, VA). At the bottom of the form, there are several buttons: 'Add'l Information', 'Commodity', 'Comment / Picture / Attachment', 'Re-Request', 'Asset Configuration', and 'Asset Kit'. A status bar at the very bottom indicates 'Record: 1/5' with a red box around the '1/5' and a red arrow pointing to the 'Next Record' icon in the top toolbar.

| FIELD NAME                                   | DESCRIPTION/EXPLANATION  |
|--|--|
| <b>Identifier</b>                            | Click the Next Record icon or use the Down Arrow on the keyboard to view the next record in the list of assets returned from the search. |
| <b>Page 2 button</b>                         | Displays the Catalog information for the asset displayed.  |
| <b>Commodity button</b>                      | If activated, used to display commodity information (quantity, unit of measure, and description) for commodity assets.                   |
| <b>Comment / Picture / Attachment button</b> | Allows users to view attached comments, pictures, and/or other documents.  |
| <b>Re-Request button</b>                     | Used to re-release assets that were not accepted to a new steward.   |

Clear the Form by clicking:

- The **Clear All** icon (second from the left, or located to the right of the **Save** icon) to clear all of the records and data from the form. This does not delete assets but simply *erases the slate*.
- The **Clear Record** icon to clear or close only one record at a time.

| NAME                | ICON  |
|---------------------|---|
| <b>Clear All</b>    |  |
| <b>Clear Record</b> |  |

## QUICK SEARCH

If the property record's asset **Identifier** (Bar Code, Tag Number, Decal, etc.) is known, a quick search can be performed to find the data associated with that individual asset.

### NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets

The screenshot shows the 'Maintain Inventory Assets' form with the following data:

| Field                 | Value               |
|-----------------------|---------------------|
| Identifier            | 0087547754016       |
| Other Identifiers (1) | INV / 0087547754016 |
| Unique Name           |                     |
| Default Location*     |                     |
| Catalog Identifier*   | 1200                |
| Manufacturer          | JW BRUSHES          |
| Official Name         | BRUSH               |
| Serial Number         | 455587              |
| Initial Event         | PURCHASE            |
| Asset Value*          | \$0.00              |
| Acquisition date      | 10/03/2012          |
| Responsibility Date   | 10/03/2012          |
| Effective Date        | 10/07/2012          |
| Expected Return Date  |                     |
| Activity Status       | IN SERVICE          |
| Manager               | LE MANAGER          |
| Steward               | ANNAM'S ORG         |
| Custodian             | AKJT                |
| User                  | Last Name* A        |
| Location*             | ARLINGTON, VA       |
| Document*             |                     |
| User Fields*          |                     |
| Global User Fields*   |                     |

**Step 1.** Navigate to the **Maintain Inventory Assets** form.

**Step 2.** Enter the asset **Identifier**.

**Step 3.** Click the **Tab** key to display the search results.

**NOTE:** Notice the status bar on the bottom of the form displays the number of records retrieved by the search (**1/1**).

**NOTE:** Since only one record is open, click either the **Clear All** icon or the **Clear Record** icon to remove the data being displayed (this will not delete the data).

**NOTE:** If searching for an individual property record just to view the latest information, the Summary and History form is recommended.

## SEARCH WITH SUMMARY AND HISTORY

The Summary and History form may become one of the most widely used forms that an organization will use to view asset information. It can be used to perform a quick search to find current as well as historical information associated with a specific asset Identifier or the Query mode can be used to display information about a group of assets.

### NAVIGATION

- Click Mgmt
- Click Inventory Asset Summary and History
- Enter asset Identifier
- Click the Tab key

The screenshot shows the 'Inventory Asset Summary and History' form for asset 'asmn2055'. The 'Barcode' field is populated with '0101'. The 'Timeline' tab is active, displaying a list of events. The 'Sort By' criteria are set to 'DATETIME DESC' for all three columns. The 'Get Records' button is visible.

| Datetime            | Category      | Description                   | Attributes                              | Document? |
|---------------------|---------------|-------------------------------|---|-----------|
| 11/21/2012 09:04:00 | ONGOING EVENT | ASSET VALUE/QUANTITY DECREASE | 0_0                                     |           |
| 11/21/2012 09:03:44 | ONGOING EVENT | ASSET VALUE/QUANTITY INCREASE | 0_0                                     |           |
| 11/21/2012 07:14:12 | ONGOING EVENT | ASSIGN METER                  | ODOMETER READING                        |           |
| 11/21/2012 00:00:00 | METER READING | ODOMETER READING              | 100                                     |           |
| 11/12/2012 01:18:18 | ONGOING EVENT | CHANGE LOCATION               | LIVERMORE, CA_BUILDING_1000             |           |
| 11/01/2012 07:14:13 | METER READING | ODOMETER READING              | 0                                       |           |
| 10/07/2012 20:15:31 | RESOLUTION    | BARCODE KEY                   | LIVERMORE, CA_BUILDING_1000 ONE ADM ADV |           |
| 05/08/1998 16:13:39 | ONGOING EVENT | CHANGE LOCATION               | LIVERMORE, CA_BUILDING_G_ROOM_200       |           |
| 05/06/1998 10:12:43 | ONGOING EVENT | CHANGE LOCATION               | LIVERMORE, CA_BUILDING_100_ROOM_123     |           |
| 05/06/1998 10:12:43 | ONGOING EVENT | CHANGE CUSTODIAN              | DOE JOHN 050598                         |           |

**Step 1.** Navigate to the **Inventory Asset Summary and History** form.

**Step 2.** Enter the asset **Identifier**.

**Step 3.** Click the **Tab** key to display the asset timeline.

**NOTE:** The **Timeline** tab automatically displays, which provides a summary of events for the selected asset, with the most recent event listed at the top. If more than one event occurred at the same time, they are both listed, in Alphabetical order.

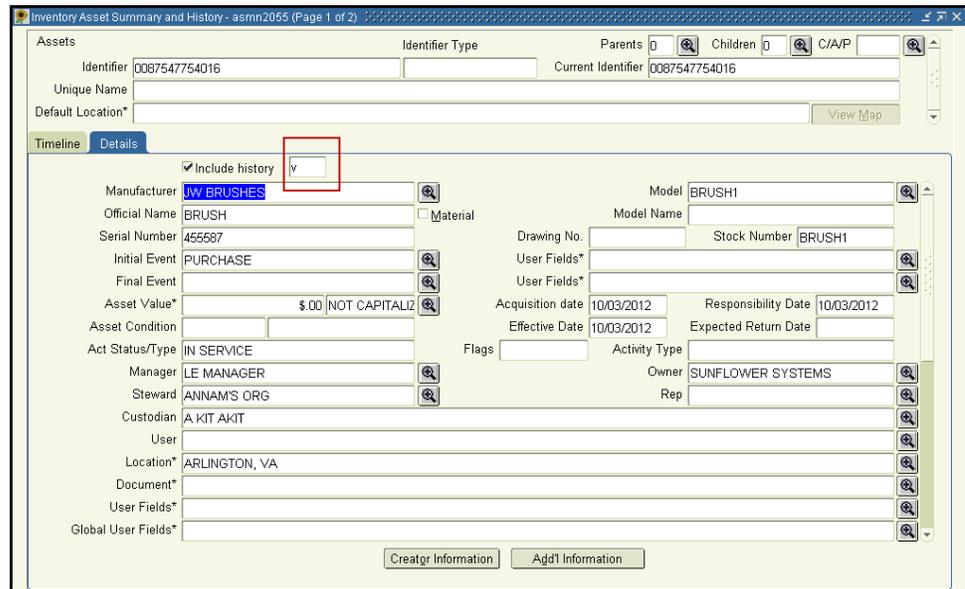
**NOTE:** Users control the amount of data displayed and how it is sorted by unchecking or checking the desired information to include and select the Sort By criteria. After making any changes, click the **Get Records** button to execute the revised search criteria.

**Step 4.** Select the **Details** tab to view detailed asset summary and/or historical information.

**Step 5.** Click the **Clear All** or **Clear Record** icon.

NOTE: Select the **Include history** checkbox prior to entering the asset **Identifier**, to include historical information for the asset record(s).

Step 6. If the **Include history** checkbox is selected, view the data, as shown below. Use the Vertical scroll bar and **Lookup** icons as required.



The (circled) field adjacent to the **Include history** checkbox provides one of the following 4 displays:

| DISPLAY                        | GRAPHIC | DESCRIPTION/EXPLANATION  |
|--------------------------------|---------|--|
| <b>Blank</b>                   |         | Either there are no historical data entries for this asset, or the Include history checkbox was not enabled.   |
| <b>Down "Carrot"</b>           |         | The user is viewing the "first" or latest record. Click the Next Record icon, the Down Arrow on the keyboard, or use the Vertical scroll bar to view the next record(s).             |
| <b>Up &amp; Down "Carrots"</b> |         | The user is between the "first" (latest) record and the "last" (initial entry) record.   |
| <b>Up "Carrot"</b>             |         | The user is viewing the "last" or initial entry record. Click the Previous Record icon, the Up Arrow on the keyboard, or use the Vertical scroll bar to view the previous record(s). |

NOTE: Users can view an asset's Summary and History from **any** Sunflower form that displays the asset Identifier. Simply select the asset **Identifier** field and then click the **Summary and History** icon. When clicking the Summary and History icon, the **Include history** checkbox is automatically checked.

## WILDCARD SEARCHES

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Use wildcards to search a List of Values (LOV) field. When a field contains a LOV (pick list) that users can choose from, enter a wildcard character (%) in the search phrase to narrow the list of options as desired. However, when using wildcards, users cannot use query operators (such as >, <, =, and so on) in a Query Criteria window.

### Auto Selection

Using the List of Values feature called Auto Selection, users can select a valid name from the list with a single keystroke. When displaying the list window, users can type the first character of the name wanted in the Find field. If only one choice begins with the character entered, Auto Selection selects the choice, closes the list window, and enters the value in the appropriate field. If the first character has more than one choice, users can either select from the List of Values or enter additional characters before Tabbing out of the field.

### List Search

Use the AutoReduction feature to reduce a list when the first few characters of the name selection is known. If the initial characters of the choice are not known, but it is known that the choice contains a certain word or set of characters, users can perform a list search to reduce a list. In the list window, enter any group of characters as search criteria in the **Find** field and click the **Find** button. Use wildcard characters such as the percent sign (%) which represents any number of characters, or an underline (\_), which represents only a single character in the search criterion. For example, to reduce a list to only those choices that contain the phrase "schedule," users could type **%sched%** in the Find field and then click Find. In any of these list search queries, it does not matter whether using uppercase or lowercase letters as the search is not case sensitive.

### Wildcards

Wildcards can be used to search any field for which there is a List of Values (LOV). The LOV feature is useful while entering data in Sunflower applications. It provides users with a powerful, easy-to-use data entry method that increases accuracy and productivity. Using the LOV makes data entry a simple task for novice users, and experienced users can enter correct data with a minimum number of keystrokes.

Sunflower notifies users when a list acceptable input value is available for a field by displaying the LOV icon (Ellipsis) in the field and displaying List of Values in the **Status Bar**. When displaying a list, the values appear in a pop-up window with a title that describes the contents.

## USING THE LIST OF VALUES (LOV)

Using the LOV feature in combination with wildcards can save time and maximize correct data entry without having to memorize or look up valid data for each field. Simply choose data from an online list of valid input choices whenever needed. Additionally, users are relying on Sunflower applications to validate input since they will know right away if the entry does not match an option from the LOV. The combination of the (%) with a character will display sets of results.

- Use % to return the complete List of Values. (A *blank* field works the same as using %.)
- Use a **character + %** to return all values that begin with the entered character(s).
- Use % + a **character** to return all values that contain the entered characters anywhere within the value.

## % WILDCARD SEARCH

Use a wildcard “%” to Return a Complete List of Values.

### NAVIGATION

- Click Mgmt
- Click Asset Search

The screenshot shows the 'Asset Search' application window. The 'Search Criteria' section includes fields for Manufacturer, Official Name, Serial Number, and Asset Value. A dropdown menu is open for the 'Manufacturer' field, displaying a list of manufacturers including ACME PREFAB, AGILENT, ALSTOM, ANNAMS SYSTEMS CORPORATION, APPLE, COMPAQ, DELL, FORD MOTOR COMPANY, GATEWAY, GENERAL ELECTRIC, HEWLETT-PACKARD, HONEYWELL, L3 COMMUNICATIONS, NON RECORDED, STEEL CASE, STEELCASE, SUNFLOWER SYSTEMS, TEKTRONIX, UNITED DIE, INC., and VOLKSWAGEN. The status bar at the bottom indicates 'Choices in list: 20' and 'Record: 1/1'.

**Step 1.** Navigate to the **Asset Search** form.

**Step 2.** Double-click in the **Manufacturer** field (% will default) to view the returned list of values.

NOTE: A blank field or a field with % entered will return **all** listed (or table) items.

NOTE: Clicking the **Cancel** button will discard retrieved results and close the LOV.

NOTE: In this example, the **Status Bar** indicates that there are 13 choices in the list. Entering a % is the same as entering nothing in the field and double-clicking to display the entire list of values.

## USE CHARACTER + % WILDCARD TO SEARCH

### NAVIGATION

- Click Mgmt
- Click Asset Search

The screenshot shows the 'Asset Search' application window. The 'Search Criteria' section includes fields for Manufacturer (containing 'A%'), Official Name, Serial Number, and Asset Value. A dropdown menu is open over the Manufacturer field, displaying a list of manufacturers: ACME PREFAB, AGILENT, ALSTOM, ANNAMS SYSTEMS CORPORATION, and APPLE. The 'Find/A%' button is visible in the dropdown. Below the search criteria are checkboxes for 'Agreement Assets', 'Inactive Assets', 'Inventory Assets', and 'Subset Assets'. The 'Assets' section contains a table with columns for 'Identifier', 'Model', and 'Official Name'. At the bottom, there are buttons for 'Find', 'OK', 'Cancel', and 'Report'. The status bar at the bottom indicates 'Choices in list: 5' and 'Record: 1/1'.

**Step 1.** Navigate to the **Asset Search** field.

**Step 2.** Enter **A%** in the **Manufacturer** field.

**Step 3.** Double-click in the **Find** field or select the **Find** button to view the returned List of Values.

**NOTE:** Notice that only those words that start with the character “**A**” are displayed.

**Step 4.** Click the **Cancel** button to discard retrieved results and close the LOV.

**Step 5.** Click the **Clear All** icon to clear the form.

The **Report** button is a shortcut to Reports within Sunflower Enterprise. It automatically opens the **Asset Search** Report and populates the appropriate fields as they were entered on the form. In order to use this feature users may need to disable their browser's "Pop-up Blocker" feature; an example of how to disable pop-ups is shown below (for Microsoft Internet Explorer). Users may also have a separate tool bar with pop-up blocker features displayed.

**Step 1.** On the Internet Explorer Menu Bar select **Tools > Internet Options...**

**Step 2.** Click the **Privacy** tab.

**Step 3.** Uncheck **Block pop-ups**.

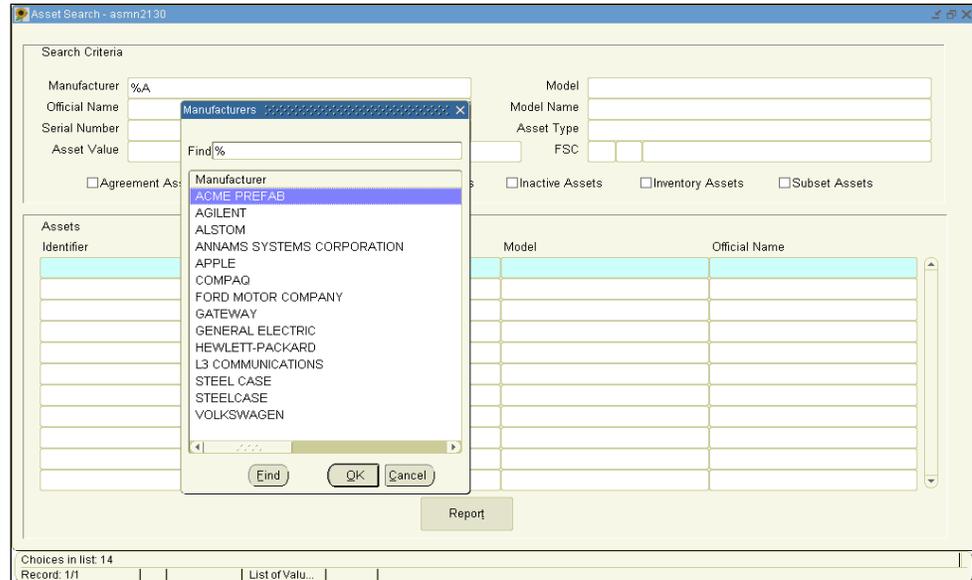
**Step 4.** Click the **Apply** button.

**Step 5.** Click the **OK** button.

## USE % WILDCARD + CHARACTER TO SEARCH

### NAVIGATION

- Click Mgmt
- Click Asset Search



**Step 1.** Navigate to the **Asset Search** field.

**Step 2.** Enter **%A** in the **Manufacturer** field.

**Step 3.** Double-click in the **Find** field or select the **Find** button to view the returned List of Values.

**NOTE:** Notice that only those words that contain the character **“A”** anywhere in the name are displayed.

## DEFINE COMPLEX FIELDS

A Complex Field is a grouping of related fields that are displayed in the form of a pop-up window. Common complex fields are Location\*, Document\*, Names\*, Catalog\*, and User Fields\*. For example, Location\* is a combination of several fields that include Site, Building, Room, etc. All complex fields are represented by their name followed by an asterisk (\*), such as **Location\***.

In this example, view the Location\* (complex field) data for an existing asset.

### NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets

The screenshot shows a software window titled "Maintain Locations - sacr2110". The window contains a form with various fields for asset management. The "Location\*" field is highlighted in yellow. Below the form, there are buttons for "Page 2", "Commodity", "Comment / Picture / Attachment", and "Re-Request". At the bottom, there is a status bar with the text "The site's long name, e.g. LIVERMORE" and "Record: 1/1".

|                        |                           |                  |                   |
|------------------------|---------------------------|------------------|-------------------|
| Site                   | LIVERMORE                 |                  |                   |
| BUILDING               | B                         | ROOM             | E                 |
| Structure Level 3 Name |                           |                  |                   |
| GPS 1                  |                           | GPS 2            |                   |
| GPS 3                  |                           |                  |                   |
| Manufacturer           | APPLE                     | Model            | M5555             |
| Official Name          | COMPUTER PORTABLE         | Model Name       | DUO DOCK          |
| Serial Number          | 1221212                   | Drawing No.      |                   |
| Initial Event          | PURCHASE                  | User Fields*     | PO12_1_55212      |
| Asset Value*           | \$4,000.00                | Acquisition Date | 01/01/1995        |
| Asset Condition        | 5 USED - FAIR             | Effective Date   | 09/07/2006        |
| Activity Status        | IN SERVICE                | Flags*           | S                 |
| Manager                | SUNFLOWER SYSTEMS         | Activity Type    |                   |
| Steward                | ASSET CENTER XX           | Accepted?        | y                 |
| Custodian              | 050598                    | Owner            | SUNFLOWER SYSTEMS |
| User                   |                           | Rep              |                   |
| Last Name*             | DOE                       | First            | JOHN              |
|                        |                           | Mid              |                   |
| Location*              | LIVERMORE_BUILDING_B_ROOM |                  |                   |
| Document*              |                           |                  |                   |
| User Fields*           |                           |                  |                   |
| Global User Fields*    |                           |                  |                   |

**Step 1.** Navigate to the **Maintain Inventory Assets** form.

**Step 2.** Enter the asset **Identifier**.

**Step 3.** Click the **Tab** key.

**Step 4.** Double-click in the **Location\*** field. The **Maintain Location** pop-up window displays.

**Step 5.** Verify or edit the existing Location data.

**Step 6.** Click the **Save** icon to close the complex field window.

**Step 7.** Click the **Exit** icon or **X** located in the upper right corner of the window to Exit without saving.

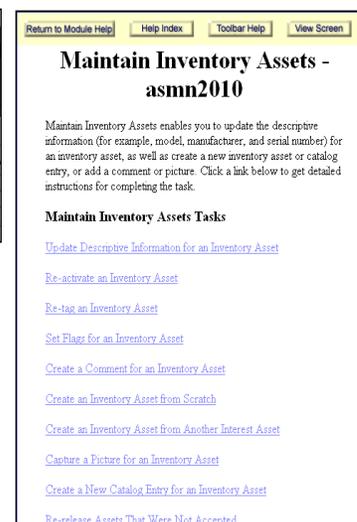
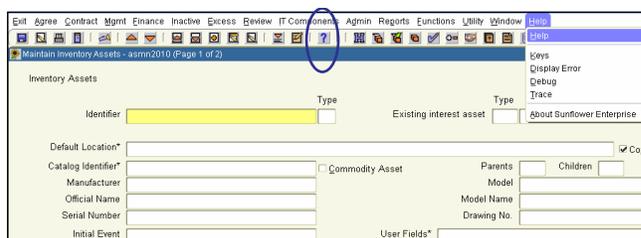
## GET HELP

Use the online Help system to learn more about a form's function and/or purpose. Since the Help System is context-sensitive it will open to the help page that corresponds to the current form. A brief description of the form is provided along with a list of common tasks that can be accomplished. Select a Help option (hyperlink) to receive step-by-step instructions about how to perform a task.

To access online Help, click the Help icon (?) or select **Help > Help** from the menu bar to view helpful topics for the specified form. Following is an example of how to use the Help feature. A form must be open in order to use the Help (?) icon.

### NAVIGATION

- Click Mgmt
- Click Maintain Inventory Assets
- Click ? icon



**Step 1.** Navigate to the **Maintain Inventory Assets** form.

**Step 2.** Click ? (Help icon) or click **Help>Help**. The Help results open in a separate window.

**Step 3.** Select the appropriate hyperlink to learn more about a specific topic.

**NOTE:** The **Toolbar Help** button can be used to review the Tool Bar icons and their uses.

**NOTE:** The **Help Index** button can be used if the activity to perform is known, but it is not known where to locate it within the Help System. It can be searched.

**NOTE:** The **Search** button enables users to enter a word or phrase in the **Search For** field and click **Search**.

NOTE: The **Return To Main Help** button can be used to review help for another module.

[Step 4](#). Click **X** or **File>Close** to exit **Help**.

NOTE: If an organization is using the Sunflower Term Set feature to alter selected field names, users need to be aware that Term Set changes **do not effect** the Help index "static" HTML pages.

## ERROR MANAGEMENT

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If a user attempts to move past a required field without entering data, Sunflower Enterprise will notify the user by displaying an error message indicating the a required field has been missed. In order to return to the missed field, use any of the following short-cut key strokes to back out of a required field.

- Hold down the **Shift** key and click the **Tab** key (**Shift + Tab**) on the keyboard.
- Enter data in the required field and then use the mouse to return to the previous field.
- Click the **Clear Record** icon to clear all of the data and begin data entry again.

