

 **REPORTING**

**S**unflower Enterprise Reports enable users to prepare reports based upon flexible criteria.

This chapter refers to the Inventory Assets (Global Information) report as an example. The concepts described in this chapter can be applied to all standard Sunflower Reports.

**KEY CONCEPTS**

This chapter will include the following discussion points and concepts:

- Launching Reports
- Basic Layout
  - *Criteria Entry Page*
  - *Criteria Review Page*
- Entering Parameters using the List of Values
  - *Accessing the List of Values*
  - *Using the Flashlight to Select Parameters*
- Previously Run Reports

## LAUNCHING REPORTS

Reports are accessible using any of the following three methods:

1. Main menu > Sunflower Enterprise Reports link
2. Reports menu
3. Module menus

### NAVIGATION

- Click Sunflower Enterprise Reports link
- Click Management Reports link
- Click Inventory Assets (Global Information) Report link

The screenshot displays the 'Inventory Assets (Global Information)' report configuration page in the Sunflower Enterprise system. The page header shows 'Sunflower Enterprise - Production 5.0.0.0'. The main content area is divided into several sections: 'Identifiers and Attributes', 'Catalog', 'Location', 'Responsibility and Accountability', and 'User Fields'. The 'Identifiers and Attributes' section contains the following fields and options:

- Inventory Asset Identifier:** A text input field.
- Serial Number:** A text input field.
- Agreement:** A dropdown menu for 'Type' and a text input field for 'Identifier'.
- Activity Status:** A text input field.
- Document Type:** A dropdown menu and a text input field for 'Document'.
- Total Value Between:** Two text input fields separated by 'and'.
- Assets As Of:** A date input field in MM/DD/YYYY format.
- Asset Flag(s):** A large text area for entering flags.
- Include Only Assets With Expected Return Date:** A checkbox and a date range input field in MM/DD/YYYY format.

Additional text on the page includes 'You can use '%' as a wildcard character in the Identifier field' and 'You can use '%' as a wildcard character in the Document field'. The footer of the page contains 'ASM6030', 'Sunflower Systems (c) 2012 All rights reserved', and 'Build 20120914'.

**Step 1.** Log in to Sunflower Assets using a unique **Username** and **Password**.

**Step 2.** Click on **Sunflower Enterprise Reports** link.

**Step 3.** From the Reports main menu, click on **Management Reports** link.

**Step 4.** Click on **Inventory Assets (Global Information)** Report link.

## BASIC LAYOUT

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This section describes the basic layout a main components of Sunflower reports.

When executing reports in Sunflower, users will navigate through two pages:

- Criteria Entry page
- Criteria Review page

Each page is discussed individually in the following sections.

## CRITERIA ENTRY PAGE

Below is a sample layout of a reports **Criteria Entry Page**.

The screenshot shows the 'Criteria Entry Page' for 'Inventory Assets (Global Information)'. The page is titled 'Sunflower Enterprise - Production 5.0.0.0'. The main content area is divided into several sections:

- 1. Report Name:** 'Inventory Assets (Global Information)' is displayed at the top left.
- 2. Menu Bar:** A vertical menu on the left side contains 'Parameters', 'Display Options', 'Sorting and Grouping', and 'File Output'.
- 3. Parameter Tabs:** Tabs for 'Identifiers and Attributes', 'Catalog', 'Location', 'Responsibility and Accountability', and 'User Fields' are visible.
- 4. Navigation Link:** A 'Management Reports Menu' link is located at the top right.
- 5. Submit Button:** A 'Submit' button is located at the top right.
- 6. Clear Button:** A 'Clear' button is located at the top right.

The main form area contains the following fields and options:

- Inventory Asset Identifier:** Text input field.
- Serial Number:** Text input field.
- Agreement:** Includes a 'Type' dropdown and an 'Identifier' text input field. A note states: 'You can use '%' as a wildcard character in the Identifier field'.
- Activity Status:** Text input field.
- Document Type:** Includes a dropdown menu and a 'Document' text input field. A note states: 'You can use '%' as a wildcard character in the Document field'.
- Total Value Between:** Two text input fields separated by 'and'.
- Assets As Of:** A date dropdown menu with the format 'MM/DD/YYYY'.
- Asset Flag(s):** A large text area.
- Include Only Assets With Expected Return Date:** A checkbox option.
- Include Only Assets With Expected Return Date Between:** Two date dropdown menus with the format 'MM/DD/YYYY' separated by 'and'.

The following table describes the main components of the **Criteria Entry Page** that will be displayed for all standard reports:

PAGE ELEMENT	DESCRIPTION
1. Report Name	Displays the name of the report that is being submitted.
2. Menu Bar	Allows users to navigate to the report criteria by type, including parameters, display options, sorting and grouping, and file output.
3. Parameter Tabs	For reports with large number of report parameters, the fields are organized and placed on separate tabs allowing for faster and easier access.
4. Navigation Link	Returns users to the report listing page of the module in which the user is working.
5. Submit Button	Records the report criteria and navigates users to the Criteria Review Page for final execution.
6. Clear Button	Clears all parameters entered for the report.

The menu bar located in the left-hand section of the screen allows users to navigate to the following items:

- Parameters
- Display Options
- Sorting and Grouping
- File Output

The following sections describes each menu option in detail.

PARAMETERS

The screenshot shows the Sunflower Enterprise interface for configuring an 'Inventory Assets (Global Information)' report. The top navigation bar includes 'Management Reports Menu', 'Submit', and 'Clear'. The left sidebar contains a menu with 'Parameters' selected, along with 'Display Options', 'Sorting and Grouping', and 'File Output'. The main configuration area is divided into tabs: 'Identifiers and Attributes', 'Catalog', 'Location', 'Responsibility and Accountability', and 'User Fields'. The 'Identifiers and Attributes' tab is active, showing fields for 'Inventory Asset Identifier', 'Serial Number', 'Agreement' (with 'Type' and 'Identifier' sub-fields), 'Activity Status', 'Document Type', 'Document', 'Total Value Between', 'Assets As Of', 'Asset Flag(s)', and 'Include Only Assets With Expected Return Date Between'. Several fields have small flashlight icons, and some have down arrow icons. A footer contains 'ASMN0030', 'Sunflower Systems (c) 2012 All rights reserved', and 'Build 20120914'.

Click on **Parameters** from the menu on the left side of the screen to enter the parameters to be included on the report. Following are definitions of the icons that may be displayed on the parameters pages:

	<p>A Flashlight icon indicates that a List of Values is available if clicking on the icon. When clicking on the flashlight icon the user will be able to scroll through all available values or search for a specific value.</p>
	<p>A Down Arrow box icon indicates the user may select the criteria for a particular field from a drop-down menu. Click on the icon to display the drop-down menu.</p>
	<p>A Calendar icon indicates that there is the option of selecting a date by clicking on the icon. This is particularly helpful to ensure users enter dates in the specific format required for the dates to be valid.</p>

In the **Inventory Assets (Global Information)** Report, the parameters are broken up into five tabs. These tabs separate the criteria that should be entered into categories. The five tabs/categories are:

- Identifiers and Attributes
- Catalog
- Location
- Responsibility and Accountability
- User Fields

NOTE: The quantity and description of these tabs will differ from report to report. Some reports with a small number of criteria will not contain tabs at all.

## DISPLAY OPTIONS

The screenshot shows the Sunflower Enterprise web application interface. The header includes the Sunflower logo and 'Sunflower Enterprise - Production 5.0.0.0'. The main content area is titled 'Inventory Assets (Global Information) Management Reports Menu' and includes 'Submit' and 'Clear' buttons. On the left, a navigation menu has four items: 'Parameters', 'Display Options' (highlighted), 'Sorting and Grouping', and 'File Output'. The main panel is titled 'Select the information you would like displayed on the report:' and contains the following options:

- Active/Retired/Both: ACTIVE (dropdown menu)  Show Only the last retirement (for Retired or Both)
- Asset Details (Unique Name, Steward, Owner, Manager, Custodian, User, Location, Expected Return Date, Stock Number, Activity Status, Acquisition date, Responsibility Date, Asset Type and Asset Condition)
- Document Details
- Inventory Asset Comments
- Inventory Asset Initial Event Details
- Inventory Asset jsf Ongoing Event Details
- Inventory Asset Final Event Details
- Inventory Asset User Fields  Show in Separate Lines
- Identifier of Related Interest Assets
- Asset Value Components
- Agreement Details

The footer contains 'ASMN8030', 'Sunflower Systems (c) 2012 All rights reserved', and 'Build 20120914'.

Click on **Display Options** from the menu on the left side of the screen. The Display Options menu allows the user to select the type of information to be displayed for the items identified by the report parameters. For example, if the parameters entered results in five assets being selected, the display options will allow the user to specify the data elements displayed for these assets.

NOTE: The display options will differ depending on the report being generated.

## SORTING AND GROUPING

Sunflower Enterprise Sunflower Enterprise - Production 5.0.0.0

Inventory Assets (Global Information) Management Reports Menu Submit Clear

- Parameters
- Display Options
- Sorting and Grouping**
- File Output

Select the field by which you want to subtotal the data within the report

Group by: NONE

Display Only Asset Quantity and Value Totals by the Selected Break Group

Select the fields by which you want the data ordered within the report groupings

Sort Order 1: IDENTIFIER

Sort Order 2: IDENTIFIER

Sort Order 3: IDENTIFIER

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Click on **Sorting and Grouping** from the menu on the left hand side of the screen. If the user would like the report data to be grouped by specific criteria, users are able to select that criteria from a drop-down menu. If the user would like to sort the report data by specific criteria, they have the option of sorting it by up to three levels; this information can be selected from a drop-down menu as well.

NOTE: The sorting and grouping options differ depending upon the report that is being generated.

## FILE OUTPUT

Sunflower Enterprise Sunflower Enterprise - Production 5.0.0.0

Inventory Assets (Global Information) Management Reports Menu Submit Clear

- Parameters
- Display Options
- Sorting and Grouping
- File Output**

Choose an output format

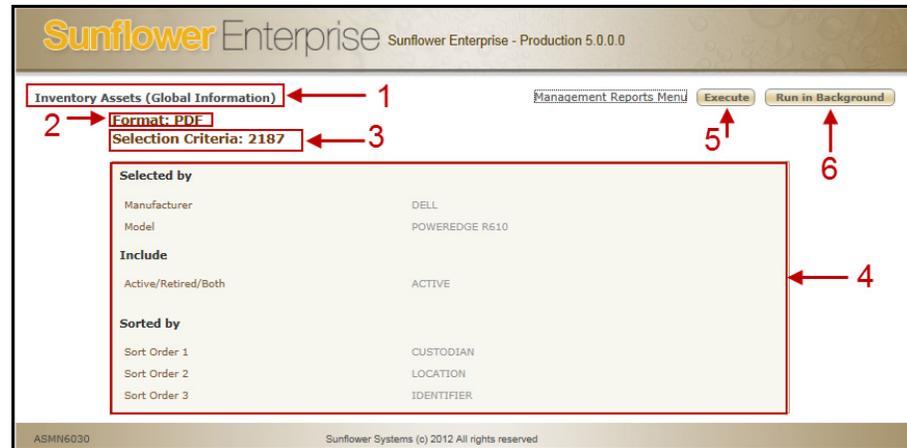
- Acrobat
- HTML
- Text file export (Excel, Lotus 1-2-3, Access ...)

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Click on **File Output** from the menu on the left hand side of the screen. Use this menu to select the format of the report file.

The default file output value is based upon the application parameter **WEBOUTPUT**. The file output options available differ based upon the report, and remain unchanged from the standard report pages.

## CRITERIA REVIEW PAGE



The purpose of the **Criteria Review Page** is to allow users to validate that they have entered complete and accurate report criteria. At this point, the user can choose to execute the report immediately, run it in the background, or return to the Criteria Entry Page or the Report Menu. The following table describes the main components of the Criteria Review Page that will be displayed for all standard reports.

PAGE ELEMENT	DESCRIPTION
1. Report Name	Displays the name of the report being submitted.
2. Format	Indicates the file output format selected (PDF, HTML, or Text).
3. Selection Criteria	Displays the system-generated number assigned to each report. This number can be used to run a Previously Run Report. Using this will ensure that the parameters users initially selected are included in each subsequent report users generate.
4. Parameter Review	Contains the parameters selected prior to submitting the report. Review as needed to ensure the user has entered the correct parameters.
5. Execute button	Generates the report. When this button is selected, the report will open up in the current window. Only one report can be generated at a time when this button is used.
6. Run in Background button	Generates the report. When this button is selected, a separate window opens allowing the user to view the status of the report during the report generation process. Multiple reports can be generated at once using this button.

**NOTE:** To modify the report parameters before generating the report, hit the **Back** button on the Internet browser.

## ENTERING PARAMETERS USING THE LIST OF VALUES

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This section describes how to enter parameters using the list of values. The following activities will be described in the sections below:

- Accessing the List of Values
- Using the Flashlight to Select Parameters

### ACCESSING THE LIST OF VALUES

The list of values for the report parameters can be accessed via a drop-down menu or through the flashlight icon on the right side of the report parameter field. When using the drop-down menu, simply click the down arrow and then select the value from the list. Drop-down menus are used when the list of possible values for the field are relatively small. Most lists are accessed through a flashlight button on the right side of the parameter field. The rest of this section will describe how to work with the list of values window through the flashlight button.

## USING THE FLASHLIGHT TO SELECT PARAMETERS

To access the List of Values (LOV) using the flashlight users have two options:

**Option 1:** Simply click the flashlight to launch the LOV. The query results will not be filtered and will display all possible values for that field up to the maximum record count.

The screenshot shows a dialog box titled "Select Activity Status". At the top, there is a "Select By" dropdown menu set to "Activity Status" and an empty search field. A "Go" button is to the right. Below this are "Select" and "Cancel" buttons. The text "6 Record(s) Found" is displayed on the right. The main area contains a table with the following data:

Select	Activity Status
<input type="radio"/>	DISPOSED OF
<input type="radio"/>	EXCESS
<input type="radio"/>	IN SERVICE
<input type="radio"/>	INACTIVE
<input type="radio"/>	LOST/STOLEN/DAMAGED - PENDING SSA342, REPORT OF SURVEY
<input type="radio"/>	WORKSTATION REPLACEMENT

At the bottom, there are navigation links: "First Previous 1 Next Last".

**Option 2:** Enter a partial value in the report parameter field and then press the flashlight to launch the LOV. The resulting records will be displayed based upon the partial search criteria entered in the parameter field.

The screenshot shows the same "Select Activity Status" dialog box, but the search field now contains the text "IN". The text "2 Record(s) Found" is displayed on the right. The table now only contains two records:

Select	Activity Status
<input type="radio"/>	IN SERVICE
<input type="radio"/>	INACTIVE

The navigation links at the bottom remain: "First Previous 1 Next Last".

### LIST OF VALUES SEARCH RESULTS

The List of Values displayed is user controlled through two parameters. The first parameter controls the maximum number of records for the list. As a default, the maximum number of records is 1000, as indicated in the message at the top of the LOV window. The second parameter controls the number of records per page. As a default, the number of records per page is set at 10. The Sunflower Administration guide will describe how the default values can be changed.

To search for a value users can either enter a partial or full value in the Search field and press Go (for example) or users can scroll through the list of displayed values using the First, Previous, Next, Last and number links.

Select Identifier

Select By Identifier  Go

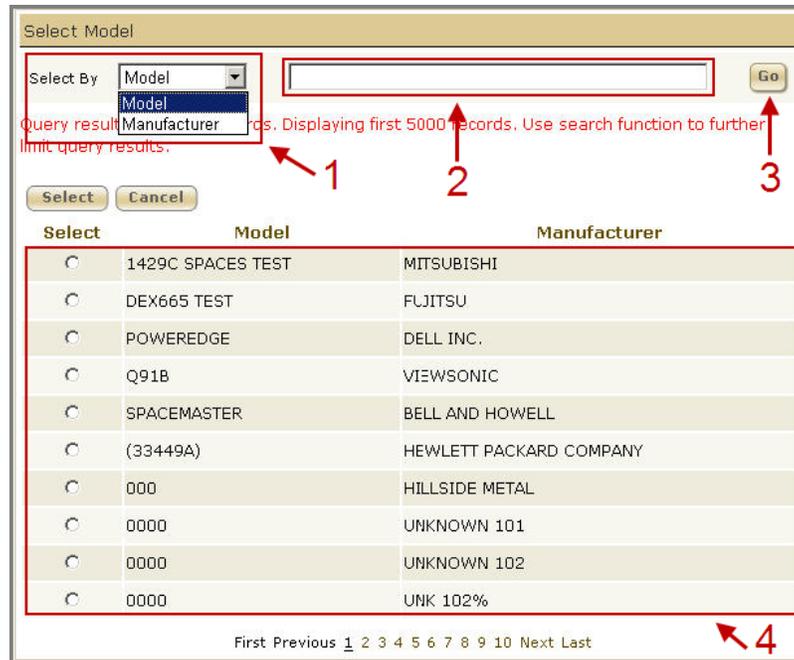
Query results in 524078 records. Displaying first 1000 records. Use search function to further limit query results.

Select
Cancel

Select	Identifier	Type
<input type="radio"/>	000000	INVENTORY ASSET
<input type="radio"/>	000001	INVENTORY ASSET
<input type="radio"/>	000002	INVENTORY ASSET
<input type="radio"/>	000003	INVENTORY ASSET
<input type="radio"/>	000004	INVENTORY ASSET
<input type="radio"/>	000005	INVENTORY ASSET
<input type="radio"/>	000006	INVENTORY ASSET
<input type="radio"/>	000007	INVENTORY ASSET
<input type="radio"/>	000010	INVENTORY ASSET
<input type="radio"/>	000011	INVENTORY ASSET

First Previous 1 2 3 4 5 6 7 8 9 10 Next Last

SEARCHING THE LOV TO FIND THE VALUE

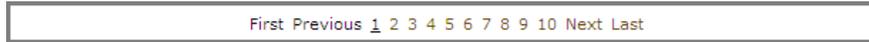


Users can search for specific values by using the controls directly under the window title.

1. Use the **Select by** control to identify the field that users wish to use to search. For example, for Model number users can search by Manufacturer or Model.
2. Enter the partial search criteria in the text field. Use the % wildcard character in the search as necessary.
3. Press the **Go** button to execute the search.
4. The LOV window will display the search results. Users may search again or scroll to locate the desired value.

## SCROLLING TO FIND THE VALUE

Page navigation is available at the bottom of the List of Values that allows users to navigate through the values for the field.



PAGE ELEMENT	DESCRIPTION
First	Navigates users to the first page of search results.
Previous	Navigates users to the previous page of search results.
Next	Navigates users to the next page of search results.
Last	Navigates users to the last page of search results.
Numbered Links	Navigates users to a specific page of search results.

Initially a maximum number of 10 page number links are displayed for scrolling. As users click through the page links, more links become available.

SELECTING THE VALUE FROM THE LOV

Select Site/Off-Site

Select By Site/Off-Site  Go

Select Cancel 7 Record(s) Found

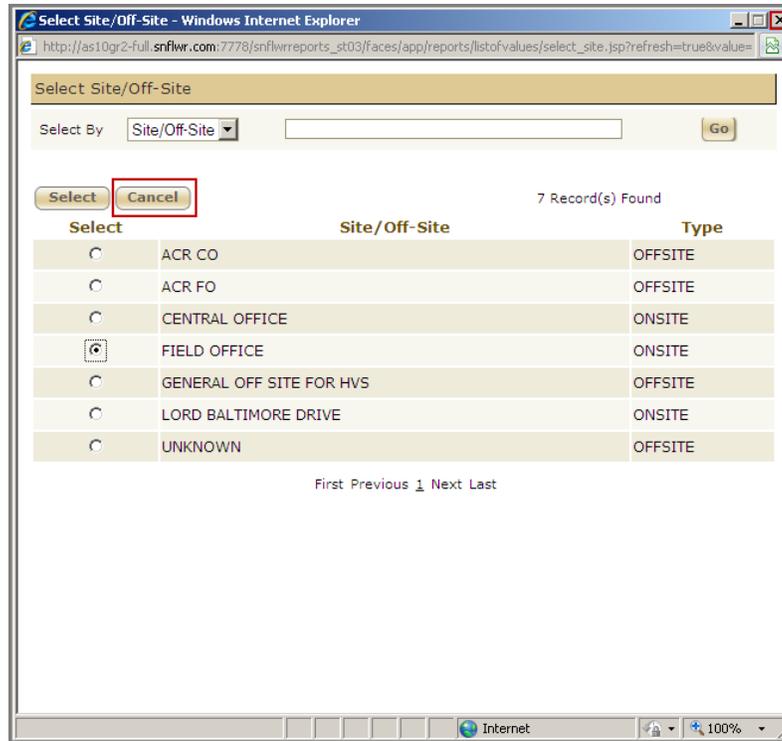
Select	Site/Off-Site	Type
<input type="radio"/>	ACR CO	OFFSITE
<input type="radio"/>	ACR FO	OFFSITE
<input type="radio"/>	CENTRAL OFFICE	ONSITE
<input checked="" type="radio"/>	FIELD OFFICE	ONSITE
<input type="radio"/>	GENERAL OFF SITE FOR HVS	OFFSITE
<input type="radio"/>	LORD BALTIMORE DRIVE	ONSITE
<input type="radio"/>	UNKNOWN	OFFSITE

First Previous 1 Next Last

When users have located the value they wish to use for that field, click the radio button in front of that value and press the **Select** button.

The user is returned to the report parameter criteria entry page and the value selected is displayed in the field.

CANCELING THE LOV REQUEST



If users decide not to select a value from the List of Values, close out of the List of Values window by using the **X** in the upper right hand corner or by using the **Cancel** button.

NOTE: This window will not be closed automatically by the application. The window cannot be closed using Submit button if the user has navigated out of the main page (changed tab or navigated to menu or other report page where that LOV is not available).

## PREVIOUSLY RUN REPORT

If there is a report that users would like to run on a regular basis, users have the option of quickly re-running a report by entering the **Selection Criteria** number.

### NAVIGATION

- Click Sunflower Enterprise Reports link
- Click Previously Run Report link

The screenshot shows a web interface with a sidebar menu on the left containing four items: Parameters, Display Options, Sorting and Grouping, and File Output. The 'Parameters' item is currently selected. The main content area on the right is titled 'Selection Criteria' and contains a single text input field.

**Step 1.** Navigate to the **Previously Run Report** link.

**Step 2.** Enter the **Selection Criteria** number from the previously run report.

NOTE: The Selection Criteria number can be pulled from the first page of the previously run report.

**Step 3.** Click on the **File Output** menu item.

The screenshot shows the 'Sunflower Enterprise' header with the version 'Production 4.5.0.0'. Below the header, the page title is 'Previously Run Report' and there are 'Management Report Menu', 'Submit', and 'Cancel' buttons. A sidebar menu on the left has 'File Output' selected. The main content area displays a red error message: 'Text output is not supported for this report'. Below the error, there is a section titled 'Choose an output format' with three radio button options: 'Acrobat', 'HTML', and 'Text file export (Excel, Lotus 1-2-3, Access ...)'. The 'Text file export' option is selected.

**Step 4.** Select the appropriate **File Output**.

**Step 5.** If users select the **Text file export** file output format for a report that does not have this as a valid file output format, the system will give users an error message once the users hits the **Submit** button.

**Step 6.** Click the **Submit** button to run the previously run report.



**PREVIOUSLY RUN REPORT**