



## USER PAGES

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**I**n addition to being able to personalize terms and field names that appear throughout the Sunflower Application, Sunflower Administrators and users can create User Pages which provide users easier access to the functions they most commonly use. The User Pages appear as links on the Sunflower Main Menu, and the names given to each link can be personalized by each user to provide easier access the various screens and reports they use.

User Pages allow for personalization based on an organization's or personal user's functionality needs and frequent transactions. For example, the property manager may want every Sunflower user to log Resolutions, so the Administrator could set up a user page for all Sunflower users called "Log Asset Finds".

With Personal User Pages, an individual Review Manager tasked with running a weekly "Executive Review Resolution Summary Report" can create a separate User Page that would direct *that user only* to the report without having to navigate to Sunflower Reports > Review Reports > Executive Review Resolution Summary. The Review Manager may call this page "High-Level Inventory Results".

Or an individual Inventory Clerk charged with submitting excess requests for inventory assets might create a Personal User Page called "Request Excess Pickup" that takes that user directly to the "Request Inventory Asset Excess Receival" screen. By personalizing the names of the pages and limiting the pages to the functions most commonly used, these User Pages allow users to perform frequent transactions more quickly and efficiently.

## KEY CONCEPTS

This chapter includes the following discussion points and concepts:

- User Page Access
- User Page Example
- Creating a Personal User Page and Adding Items to a Personal User Page
- Removing Items from a Personal User Page
- Removing a Personal User Page

## USER PAGE ACCESS

Users may be limited in the User Pages they can set up and access depending upon both the Sunflower roles they have and the access groups set up in Sunflower. **Sunflower Administrators set up the Global User Pages and the Roles**, so users requiring the ability to access certain screen or reports should contact their Sunflower Administrator. The following rules apply to the User Pages:

1. If a user does not have a particular role, that user will not have the ability to create a User Page or access a link on a Global User Page where that role is required.

Example 1: If the Global User Page contains a link to Capitalize Financial Assets, a user without any Financial roles will not see this link in the Global User Pages.

Example 2: If a user does not have the ability to create Inventory Assets, that user will not be able to set up a Personal User Page link to the Maintain Inventory Assets screen.

2. If a user does not have any roles connected to any of the links in the Global User Page, the Global User Page itself will not be displayed for that user.

For example: If the Global User Page contains only links for the Excess staff and a user has no Excess roles, that user will not see that there is a Global User Page.

3. Global pages can be used in conjunction with the access groups functionality to segregate the Global User Pages by specific access groups.

For example: If an organization has an access group for Fleet, the Sunflower Administrator can create a Global User Page for Fleet Management and set it so that only the people with the Fleet access group will see it. This assignment of User Page to access group is done in Maintain Access Groups.

## USER PAGE EXAMPLE

Before describing how to set up a User Page, please view the example below.

### NAVIGATION

- Click into whichever User Pages will be accessed



Welcome: Adm One

To enter, click one of the the links below.

<a href="#">Sunflower Enterprise Forms</a>	<a href="#">Sunflower Real Property Forms</a>
<a href="#">Sunflower Enterprise Reports</a>	<a href="#">Sunflower Real Property Reports</a>
<a href="#">Sunflower Enterprise HTML Transaction Pages</a>	
<a href="#">Search Attachments and Comments</a>	

User Pages

[Admin Tasks](#)

Global Pages

[Weekly Tasks](#)

**NAVIGATION**

- Click Weekly Tasks (or whatever the user has named the page)
- Click Create New Property Records



To enter, click one of the the links below.

**[ - ] Weekly Reports**  
 Assets to be tagged  
 Inventory Listing Report

**[ - ] Weekly Tasks**  
 Create New Property Records

NOTE: The above example shows this user's User Page. Note that this user has set up a page for weekly reports and to create property records.

NOTE: When a user clicks on a User Page link, the name of the link appears at the top of the screen. In the example below, instead of the screen being titled "Maintain Inventory Assets", the screen is now called "Create New Property Records", based on the naming convention provided by the user in the User Pages.

Create New Property Records - asmn2010 (Page 1 of 3)

Inventory Assets

Ull  No

Other Identifiers (0)

Identifier*	Type	Existing interest asset	Type
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Unique Name

Default Location\*

Catalog Identifier\*   Commodity Asset  Material

Manufacturer

Official Name

Serial Number

Initial Event

Asset Value\*

Asset Condition

Activity Status

Manager

Office

Custodian

Parents

Model

Model Name

Drawing No.

User Fields\*

Acquisition Date

Effective Date

Flags\*

Activity Type

Accepted?

Owner

Rep

First

Last Name\*

## CREATING A PERSONAL USER PAGE

Any Sunflower user can create a **Personal User Page**. However, it is important to remember that a user must have access to a particular form or report to be able to add it to a user page. If a user should not have access to certain forms or reports, these items will not be available for selection and assignment to the Personal User Page.

### NAVIGATION

- Click Admin
- Click People
- Click Maintain Personal User Pages

The screenshot shows a web browser window titled "Maintain Personal User Pages - saad0170". The main form has a "Title" field with the text "Inventory Forms Page" and a "Publish" checkbox that is checked. Below the title field is a large area labeled "-MAIN MENU". To the right of the main menu area is a form for adding a new item, with fields for "Display Sequence", "Title", "Hint", "Menu", "Description", "Module Type", and "URL". There are "Add" and "Delete" buttons at the bottom of the main menu area.

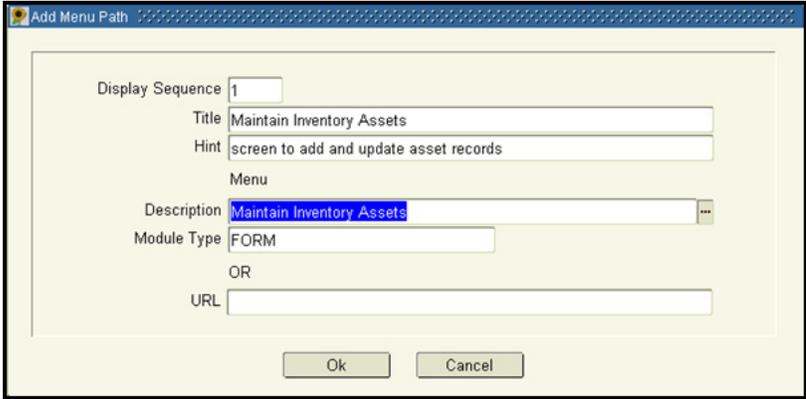
**Step 1.** Navigate to the **Maintain Personal User Pages** form.

**Step 2.** Enter a name for the User Page in the **Title** field.

**Step 3.** Click the **Publish** checkbox so that the user page, once created, will be displayed upon login.

**Step 4.** Click the **MAIN MENU** title.

**Step 5.** Click the **Add** button to add a form or report to the menu path. A pop up box will appear.



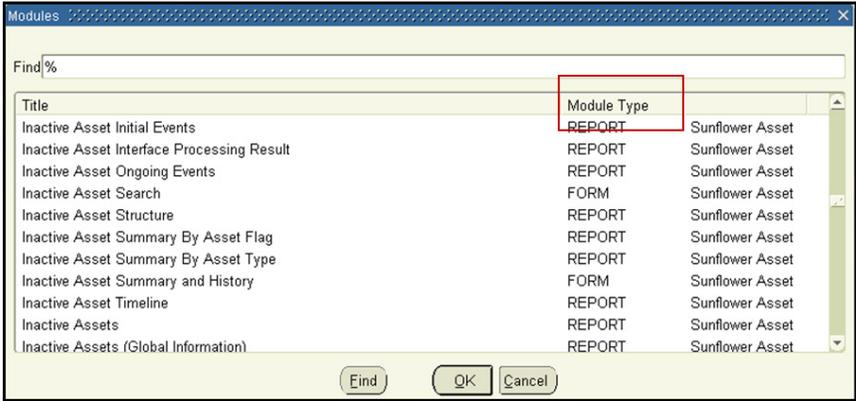
Step 6. In the **Display Sequence** field, enter the position that the link should be displayed (e.g. “1”).

Step 7. In the **Title** field, enter the title of the link (this should be the name of the form or report).

Step 8. In the **Hint** field, enter a hint (optional).

Step 9. Click in the **Description** field and select the form or report that will be added.

NOTE: Be sure to note whether the selection is a Sunflower Form or Sunflower Report in Module Type. Module Type will automatically populate based on the selection



Step 10. Click **OK**.

Step 11. Log out of Sunflower and log back in. The personal user page created will be displayed.



 **Sunflower**Enterprise Sunflower Enterprise - Production 5.0.0.0

Welcome: Manager Inventory

To enter, click one of the the links below.

- [Sunflower Enterprise Forms](#)
- [Sunflower Enterprise Reports](#)
- [Sunflower Enterprise HTML Transaction Pages](#)
- [Search Attachments and Comments](#)

User Pages

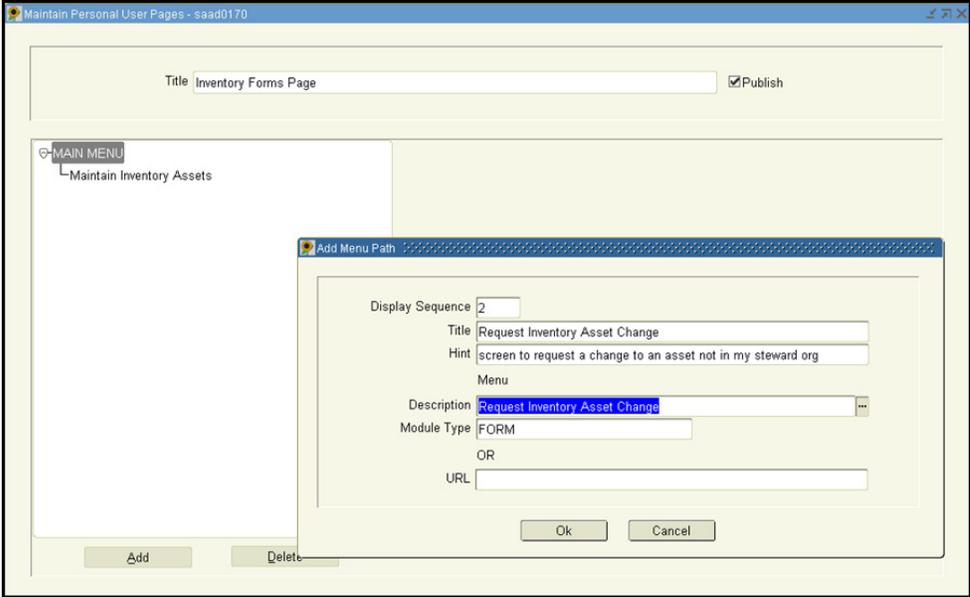
- [Inventory Forms Page](#)

Step 12. Click on the link for **Inventory Forms Page**.

Step 13. Click on the **Maintain Inventory Assets** form. The form will open from the personal user page.

Step 14. To add additional forms or reports under the heading **Inventory Forms Page**, repeat the steps above and choose display “2”, and so on (See below).

CREATING A PERSONAL USER PAGE

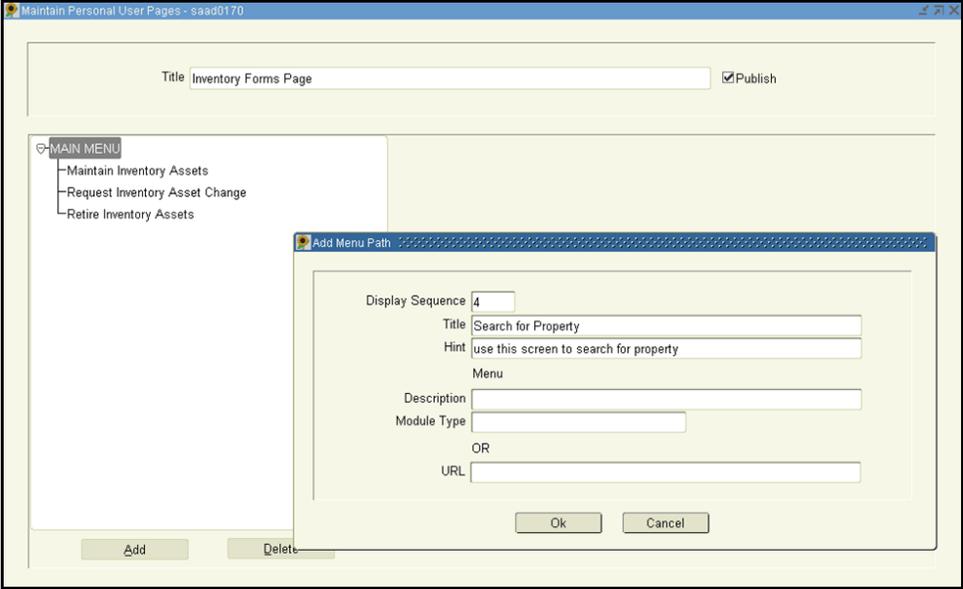


## CREATING A PERSONAL USER PAGE

The screenshot shows the 'Maintain Personal User Pages' application window. The title bar reads 'Maintain Personal User Pages - saad0170'. The main window has a title field containing 'Inventory Forms Page' and a 'Publish' checkbox which is checked. On the left, there is a 'MAIN MENU' tree with two items: 'Maintain Inventory Assets' and 'Request Inventory Asset Change'. A modal dialog box titled 'Add Menu Path' is open in the foreground. The dialog contains the following fields: 'Display Sequence' with the value '3', 'Title' with 'Retire Inventory Assets', 'Hint' with 'Screen to retire assets', 'Menu' (empty), 'Description' with 'Create Inventory Asset Final Events', 'Module Type' with 'FORM' (highlighted in blue) and 'Sunflower Asset' to its right, 'OR' (text), and 'URL' (empty). At the bottom of the dialog are 'Ok' and 'Cancel' buttons. The main window has 'Add' and 'Delete' buttons at the bottom.

This screenshot shows the same application window after the 'Add Menu Path' dialog has been used. The 'MAIN MENU' tree now includes a third item, 'Retire Inventory Assets', which is highlighted in blue. The 'Add Menu Path' dialog is still open, showing the same configuration as in the previous screenshot. The 'Add' and 'Delete' buttons are visible at the bottom of the main window.

Step 15. To add another tier to the personal user page that was created, repeat the steps above, but do not choose a report or form in the **Description** field.

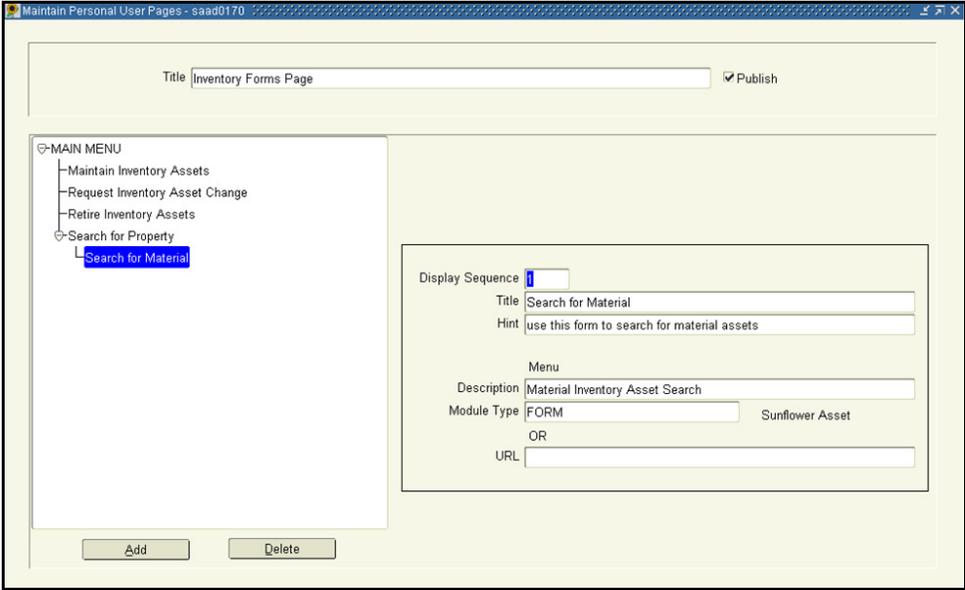


Step 16. With the new link (**Search for Property**) highlighted, click the **Add** button.

The screenshot shows a web application window titled "Maintain Personal User Pages - saad0170". The main area has a "Title" field containing "Inventory Forms Page" and a "Publish" checkbox that is checked. On the left, there is a "MAIN MENU" tree with the following items: "Maintain Inventory Assets", "Request Inventory Asset Change", "Retire Inventory Assets", and "Search for Property". The "Search for Property" item is highlighted. An "Add Menu Path" dialog box is open in the foreground, containing the following fields: "Display Sequence" (1), "Title" (Search for Material), "Hint" (use this form to search for material assets), "Menu" (empty), "Description" (Material Inventory Asset Search), "Module Type" (FORM), "OR" (Sunflower Asset), and "URL" (empty). "Ok" and "Cancel" buttons are at the bottom of the dialog.

Step 17. Click **Ok**. The form has been added on another sub-tier.

CREATING A PERSONAL USER PAGE



## REMOVE ITEMS FROM A PERSONAL USER PAGE

Items that are no longer needed can be removed from a user page.

### NAVIGATION

- Click Admin
- Click People
- Click Maintain Personal User Pages

The screenshot shows a web application window titled "Maintain Personal User Pages - saad0170". At the top, there is a "Title" field containing "Inventory Forms Page" and a "Publish" checkbox which is checked. Below this is a "MAIN MENU" tree view with the following items: "Maintain Inventory Assets", "Request Inventory Asset Change", "Retire Inventory Assets" (highlighted in blue), "Search for Property", and "Search for Material". To the right of the menu is a form for editing the selected item. The form contains the following fields: "Display Sequence" (value: 3), "Title" (value: Retire Inventory Assets), "Hint" (value: Screen to retire assets), "Menu" section with "Description" (value: Create Inventory Asset Final Events) and "Module Type" (value: FORM, with "Sunflower Asset" as a sub-label), and "URL" (value: OR). At the bottom of the form are two buttons: "Add" and "Delete". The "Delete" button is highlighted with a red rectangular box.

**Step 1.** Navigate to the **People Personal User Pages** form.

**Step 2.** Click the **find** (flashlight) icon twice to locate the personal user page to modify.

**Step 3.** Click on the link to the form or report to be removed.

**Step 4.** Click the **Delete** button. The link is removed.

**Step 5.** Click **Save**.

## REMOVING A PERSONAL USER PAGE

In order to remove a personal user page and ensure that it will not appear upon login, it is only necessary to uncheck the **Publish** checkbox. This checkbox dictates whether or not the personal user page is published on the main menu.

### NAVIGATION

- Click Admin
- Click People
- Click Maintain Personal User Pages

The screenshot shows the 'Maintain Personal User Pages' interface. At the top, there is a title field 'Inventory Forms Page' and a 'Publish' checkbox which is checked. Below this is a 'MAIN MENU' tree view with the following items: 'Maintain Inventory Assets', 'Request Inventory Asset Change', 'Retire Inventory Assets' (highlighted in blue), 'Search for Property', and 'Search for Material'. To the right of the menu is a form for editing the selected page. The form fields are: 'Display Sequence' (3), 'Title' (Retire Inventory Assets), 'Hint' (Screen to retire assets), 'Menu' (Create Inventory Asset Final Events), 'Description' (Create Inventory Asset Final Events), 'Module Type' (FORM), 'Sunflower Asset' (Sunflower Asset), and 'URL' (empty). At the bottom of the form are 'Add' and 'Delete' buttons.

- Step 1.** Navigate to the **Maintain Personal User Pages** form.
- Step 2.** Click the **find** (flashlight) icon twice to locate the user page to be removed.
- Step 3.** Remove the check mark in the **Publish** box.
- Step 4.** Click **Save**. The page will no longer appear upon logging into Sunflower.

NOTE: A Personal User Page can be published or un-published at any time.