

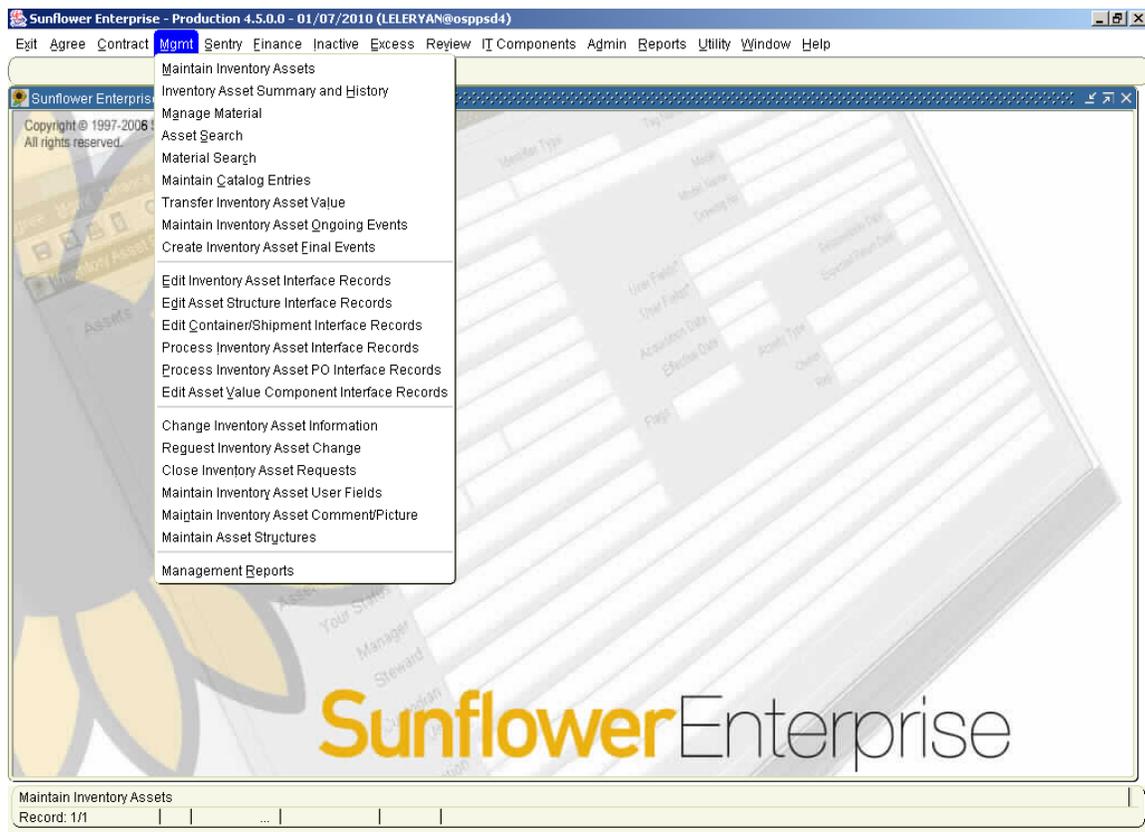


## Attach Documents in Sunflower Job Aid

The purpose of this document is to outline the steps for attaching a new document as well as an existing document to an asset record.

### Attach Document to an Asset Record

1. Login to Sunflower
2. Click on the **Sunflower Enterprise Forms** link
3. From the Mgmt menu, select the **Maintain Inventory Assets** option





#### 4. The **Maintain Inventory Assets** screen is displayed

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Inventory Assets

Barcode #	<input type="text"/>	Barcode Type	<input type="text"/>	Existing interest asset	<input type="checkbox"/>	Type	<input type="text"/>	Barcode #	<input type="text"/>	Released?	<input type="checkbox"/>
Unique Name	<input type="text"/>										
Default Location*	<input type="text"/>										<input checked="" type="checkbox"/> Copy to Location?
Catalog Identifier*	<input type="text"/>	<input type="checkbox"/> Commodity Asset	Parents	<input type="text"/>	Children	<input type="text"/>	C/P/A	<input type="text"/>			
Manufacturer	<input type="text"/>	Model Number		<input type="text"/>							
Description	<input type="text"/>	Model Name		<input type="text"/>							
Serial Number	<input type="text"/>	Drawing No.		<input type="text"/>							
Initial Event	<input type="text"/>										
Asset Value*	<input type="text"/>	User Fields*		<input type="text"/>							
Asset Condition	<input type="text"/>	<input type="text"/>	Acquisition Date	<input type="text"/>	Responsibility Date	<input type="text"/>					
Utilization Code	<input type="text"/>	<input type="text"/>	Effective Date	<input type="text"/>	Expected Return Date	<input type="text"/>					
Bureau or Region	<input type="text"/>	Flags*	<input type="text"/>	Activity Type	<input type="text"/>						
Cust Area	<input type="text"/>	Property Accountability Office		<input type="text"/>							
Contact ID	<input type="text"/>	Accepted?	<input type="checkbox"/>	Prop Custodian	<input type="text"/>						
User	<input type="text"/>	Last Name*	<input type="text"/>	First	<input type="text"/>	Mid	<input type="text"/>				
	<input type="text"/>	Last Name*	<input type="text"/>	First	<input type="text"/>	Mid	<input type="text"/>				
Location*	<input type="text"/>										
Document*	<input type="text"/>										
User Fields*	<input type="text"/>										
Global User Fields*	<input type="text"/>										

The tracking identifier assigned to the interest asset

Record: 1/1



5. Enter the barcode number of the asset in the **Barcode #** field and hit the **Tab** button. Enter in all required information.

**Note:** Adding an attachment to the Comment/Picture/Attachment button on the asset record will not count as the Acquisition Attachment. You must add the acquisition attachment to the “**Document\***” field selected below.

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

6. Double click in the **Document\*** field. The **Maintain Documents** screen is displayed.

Documents

Type  Doc. No.

Storage Type EXTERNAL

Organization

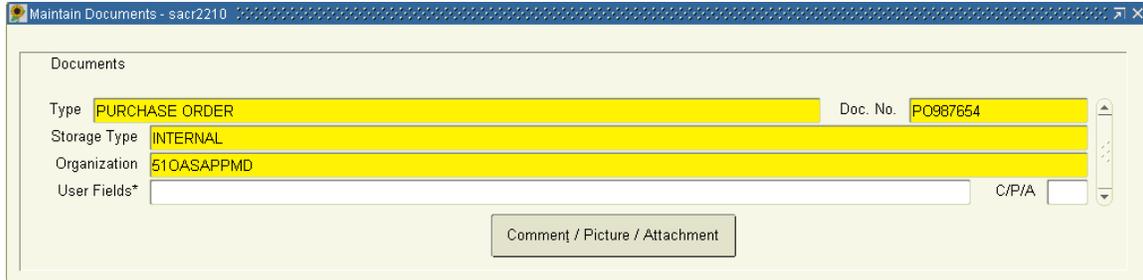
User Fields\*  C/P/A

Comment / Picture / Attachment

7. Select the type of document you are going to attach from the **Type LOV** by clicking on the **LOV** button .
8. Click the **OK** button after you have made your selection. The selection is populated in the **Type** field.
9. Enter the document number in the **Doc. No.** field. The document number must be unique.



10. Select the document's storage from the **Storage Type** field.
  - a. **IMPORTANT:** In order to attach a document you must change this to **Internal**
11. Enter your Custodial Area in the **Organization** field. You may click on the **LOV** button  to display the list of values.



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Documents

Type: PURCHASE ORDER Doc. No. PO987654

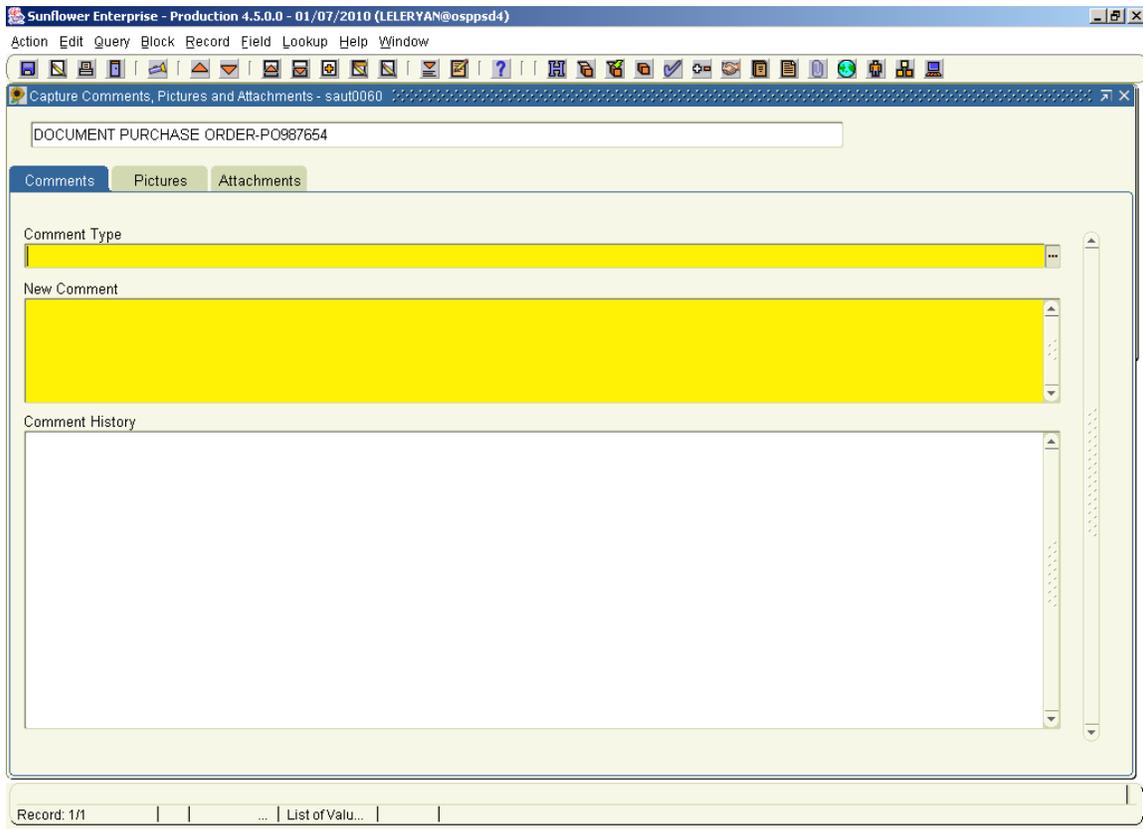
Storage Type: INTERNAL

Organization: 51OASAPPMD

User Fields\*  C/P/A

Comment / Picture / Attachment

12. The **Comment/Picture/Attachment** button is enabled when you select **Internal** in the **Storage Type** field.
13. Click on the **Comment/Picture/Attachment** button. The **Capture Comments, Pictures and Attachments** screen is displayed.



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Action Edit Query Block Record Field Lookup Help Window

Capture Comments, Pictures and Attachments - saut0060

DOCUMENT PURCHASE ORDER-PO987654

Comments Pictures Attachments

Comment Type

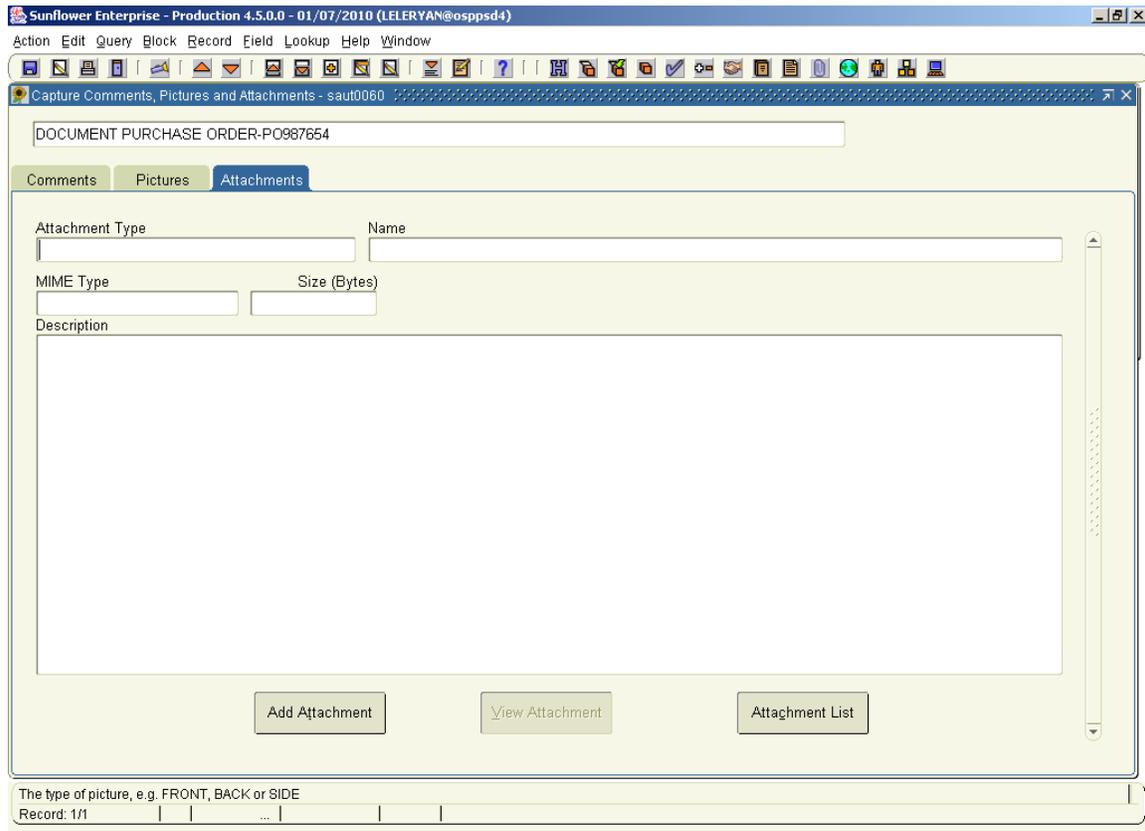
New Comment

Comment History

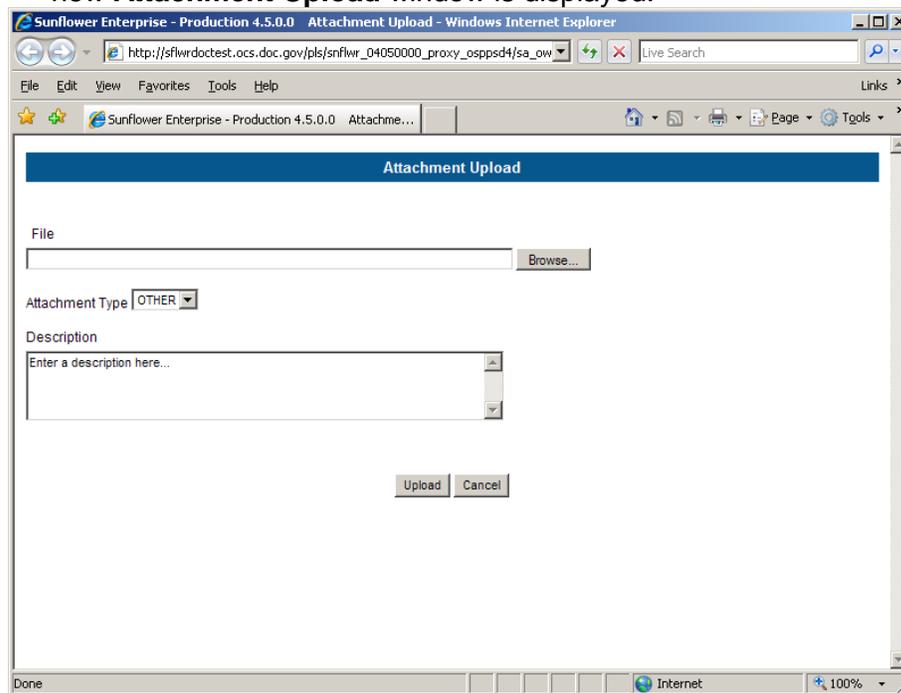
Record: 1/1 | ... | List of Valu...



14. Click on the **Attachments** tab. The **Attachments** tab is displayed.

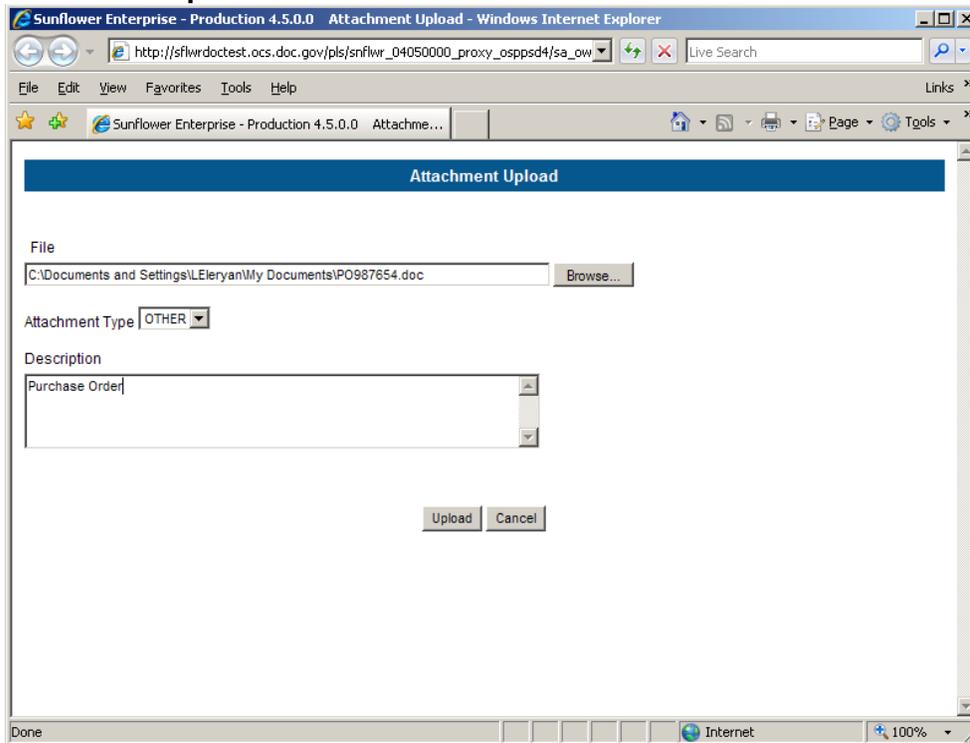


15. Click on the **Add Attachment** button to add the attachment to the asset record. A new **Attachment Upload** window is displayed.

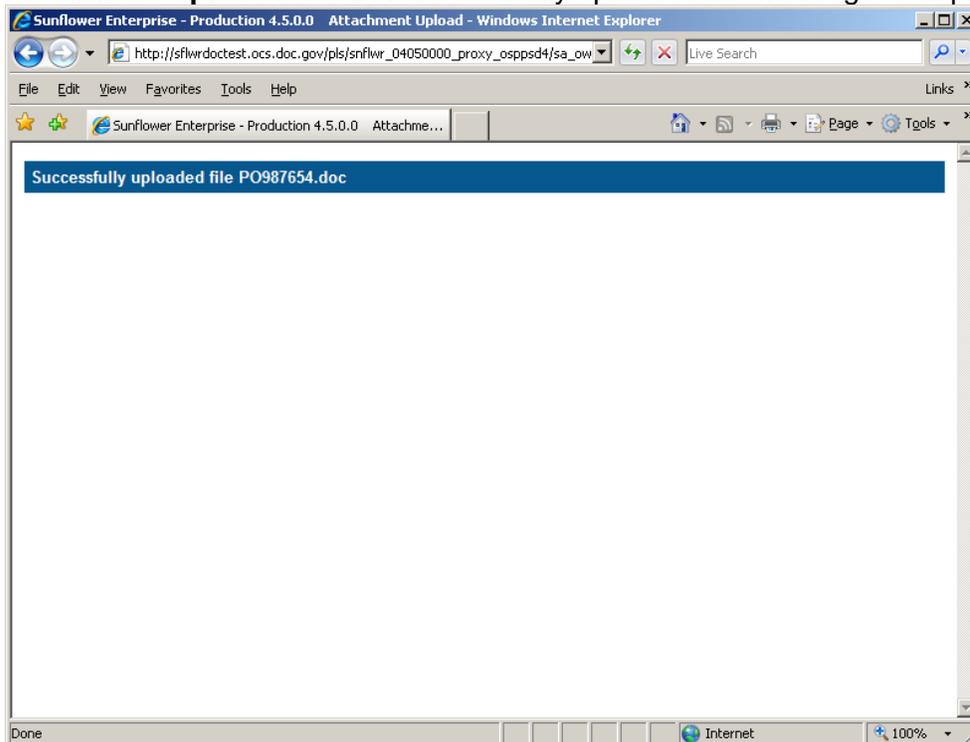




16. Click on the **Browse** button to find the attachment on your desktop or computer. This is similar to attaching a document to an email.
17. Enter a description for the attachment, for example Purchase Order, Invoice, etc., in the **Description** field.

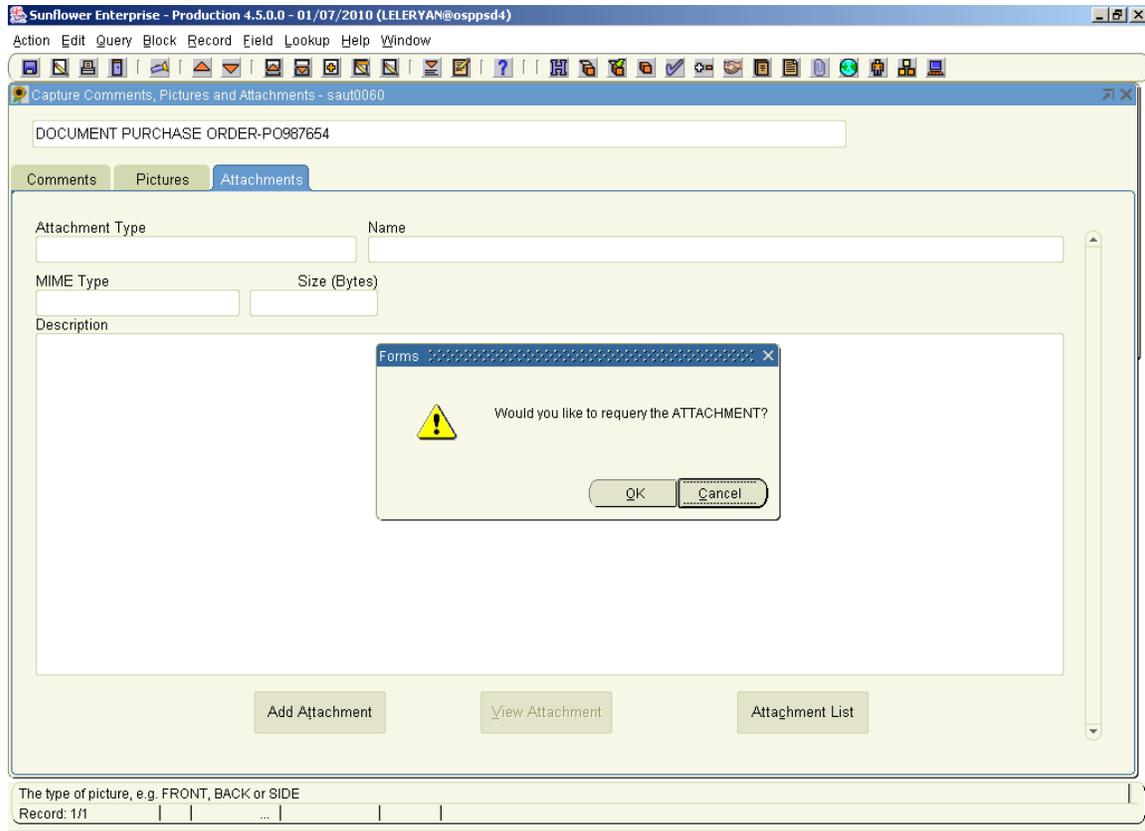


18. Click the **Upload** button. A 'Successfully uploaded file' message is displayed.





19. Click the 'X' to close the **Attachment Upload** window. Click on the Sunflower Enterprise Forms window to return to the **Capture Comments, Pictures and Attachments** screen. . A **Forms** dialog box is displayed.





20. Click the **OK** button. The information from the attachment you uploaded is populated.

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DOCUMENT PURCHASE ORDER-PO987654

Comments Pictures Attachments

Attachment Type: OTHER Name: PO987654.doc

MIME Type: application/msword Size (Bytes): 225792

Description: Purchase Order

Add Attachment View Attachment Attachment List

The type of picture, e.g. FRONT, BACK or SIDE  
Record: 1/1 ... List of Valu...

21. Click the **Save** icon  to save the attachment and return to the **Maintain Documents** screen. The **Maintain Documents** screen is displayed. Note the 'A' in the **C/P/A** field. This lets the user know an Attachment is available.

Maintain Documents - sacr2210

Documents

Type: PURCHASE ORDER Doc. No.: PO987654

Storage Type: INTERNAL

Organization: 510ASAPPMO

User Fields\*

C/P/A: A

Comment / Picture / Attachment



22. Click the **Save** icon to save the Documents record and return to the **Maintain Inventory Assets** screen. Note the Document information is populated in the **Documents \* field**.

The screenshot shows the 'Maintain Inventory Assets' screen in Sunflower Enterprise. The document field is highlighted in red. The document value is 'PURCHASE ORDER++PO987654'. The asset details include:

Barcode #	Barcode Type	Type	Barcode #	Released?
CD0000915514	<input type="checkbox"/>	Existing interest asset		<input type="checkbox"/>

Other fields include: Unique Name, Default Location\*, Catalog Identifier\* OS147329, Manufacturer INTERMEC TECHNOLOGIES CORPORATION, Description SCANNER, HANDHELD, Serial Number 26800500234, Initial Event PURCHASE, Asset Value\* \$1,804.00, Acquisition Date 08/28/2005, Responsibility Date 09/28/2005, Asset Condition 1 NEW OR UNUSED, Effective Date 01/07/2010, Expected Return Date, Utilization Code IN SERVICE, Flags\* S O, Activity Type AGENCY OWNED, Bureau or Region OS, Property Accountability Office 51OASA, Cust Area 51OASAPPMD, Accepted? Y, Prop Custodian SUNFLOWER TEST2 CPPTST2, Contact ID AHOUSTON, Last Name\* HOUSTON, First ANNA, Mid K, User CPPLJS, Last Name\* ARRINGTON, First LASHAWNDA, Mid J, Location\* WASHINGTON, DC \_BUILDING \_HCHB \_ROOM \_2857, Document\* PURCHASE ORDER++PO987654, User Fields\*, Global User Fields\*.

Buttons: Add'l Information, Commodity, Comment / Picture / Attachment, Re-Request.

The document supporting this action  
Record: 1/1

23. Click the **Save** icon to save the asset record.

**End of activity.**



## Attach Existing Document to an Asset Record

1. Login to Sunflower
2. Click on the **Sunflower Enterprise Forms** link
3. From the Mgmt menu, select the **Maintain Inventory Assets** option

The screenshot displays the Sunflower Enterprise software interface. The title bar reads "Sunflower Enterprise - Production 4.5.0.0 - 01/07/2010 (LELERYAN@ospssd4)". The menu bar includes "Exit", "Agree", "Contract", "Mgmt", "Entry", "Finance", "Inactive", "Excess", "Review", "IT Components", "Admin", "Reports", "Utility", "Window", and "Help". The "Mgmt" menu is open, showing a list of options including "Maintain Inventory Assets", "Inventory Asset Summary and History", "Manage Material", "Asset Search", "Material Search", "Maintain Catalog Entries", "Transfer Inventory Asset Value", "Maintain Inventory Asset Ongoing Events", "Create Inventory Asset Final Events", "Edit Inventory Asset Interface Records", "Edit Asset Structure Interface Records", "Edit Container/Shipment Interface Records", "Process Inventory Asset Interface Records", "Process Inventory Asset PO Interface Records", "Edit Asset Value Component Interface Records", "Change Inventory Asset Information", "Request Inventory Asset Change", "Close Inventory Asset Requests", "Maintain Inventory Asset User Fields", "Maintain Inventory Asset Comment/Picture", "Maintain Asset Structures", and "Management Reports". The background shows a blurred view of the "Maintain Inventory Assets" form, which includes fields for "Material Type", "Material Name", "Drawing No.", "User Field", "Acquisition Date", "Effective Date", "Asset Type", "Quantity", "Current Asset Date", and "Asset ID". The Sunflower Enterprise logo is visible at the bottom of the interface.



#### 4. The **Maintain Inventory Assets** screen is displayed

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Inventory Assets

Barcode #	<input type="text"/>	Barcode Type	<input type="text"/>	Existing interest asset	<input type="checkbox"/>	Type	<input type="text"/>	Barcode #	<input type="text"/>	Released?	<input type="checkbox"/>	
Unique Name	<input type="text"/>											
Default Location*	<input type="text"/>										<input checked="" type="checkbox"/> Copy to Location?	
Catalog Identifier*	<input type="text"/>	<input type="checkbox"/> Commodity Asset	Parents	<input type="text"/>	Children	<input type="text"/>	C/P/A	<input type="text"/>				
Manufacturer	<input type="text"/>	Model Number		<input type="text"/>								
Description	<input type="text"/>	Model Name		<input type="text"/>								
Serial Number	<input type="text"/>	Drawing No.		<input type="text"/>								
Initial Event	<input type="text"/>											
Asset Value*	<input type="text"/>	User Fields*		<input type="text"/>								
Asset Condition	<input type="text"/>	<input type="text"/>	Acquisition Date	<input type="text"/>	Responsibility Date	<input type="text"/>						
Utilization Code	<input type="text"/>	<input type="text"/>	Effective Date	<input type="text"/>	Expected Return Date	<input type="text"/>						
Bureau or Region	<input type="text"/>	Flags*	<input type="text"/>	Activity Type	<input type="text"/>							
Cust Area	<input type="text"/>	Property Accountability Office		<input type="text"/>								
Contact ID	<input type="text"/>	Accepted?	<input type="checkbox"/>	Prop Custodian	<input type="text"/>							
User	<input type="text"/>	Last Name*	<input type="text"/>	First	<input type="text"/>	Mid	<input type="text"/>					
		Last Name*	<input type="text"/>	First	<input type="text"/>	Mid	<input type="text"/>					
Location*	<input type="text"/>											
Document*	<input type="text"/>											
User Fields*	<input type="text"/>											
Global User Fields*	<input type="text"/>											

The tracking identifier assigned to the interest asset

Record: 1/1



5. Enter the barcode number of the asset in the **Barcode #** field and hit the **Tab** button. The asset record is displayed.

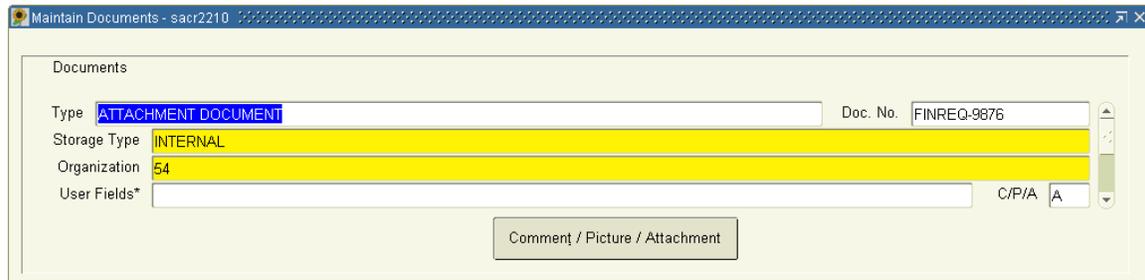
The tracking identifier assigned to the interest asset  
Record: 1/1

6. Double click in the **Document\*** field. The **Maintain Documents** screen is displayed.

7. Click on the **Flashlight** icon  to search for the existing document. The search is enabled.



- Enter the document number in the **Doc. No.** field. You may also enter additional search criteria in other fields, for example the Type or Organization field. You can also use the wildcard, '%' in your search.
- Click the **Flashlight** icon  to execute the search. The search results are displayed.



Maintain Documents - sacr2210

Documents

Type: ATTACHMENT DOCUMENT Doc. No. FINREQ-9876

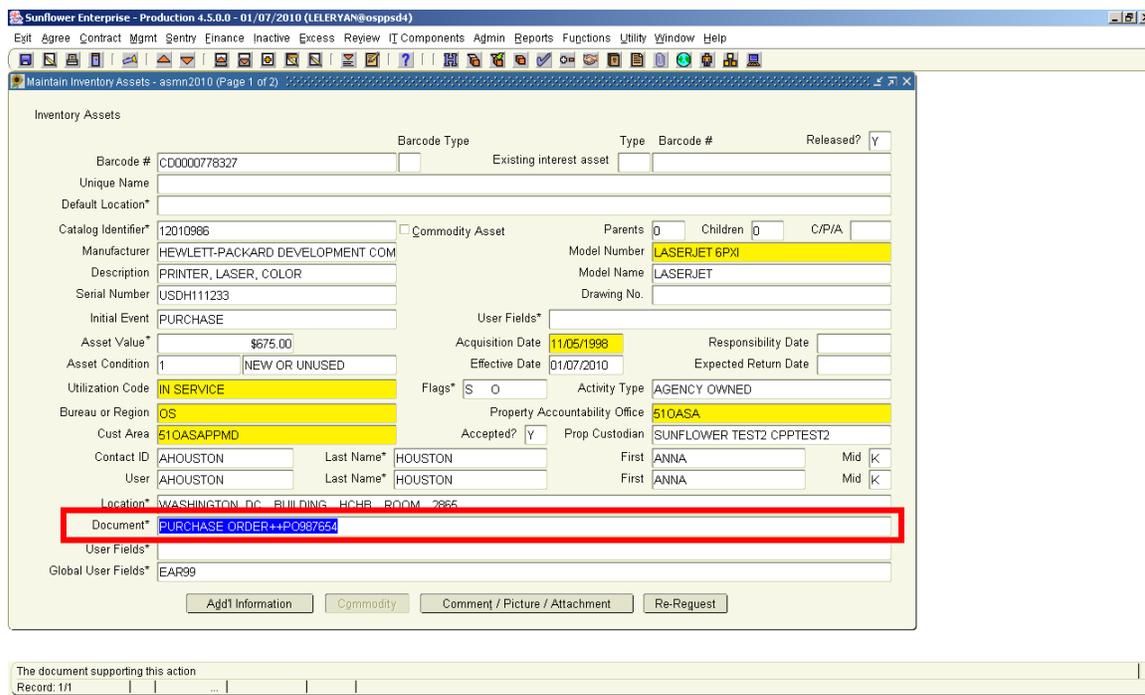
Storage Type: INTERNAL

Organization: 54

User Fields\* C/P/A A

Comment / Picture / Attachment

- Use the down arrow on your keyboard or the scrollbar to browse through the results until you find the record you are looking for.
- Click the **Save** icon to save the Documents record and return to the **Maintain Inventory Assets** screen. Note the Document information is populated in the **Documents \*** field.



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Maintain Inventory Assets - asrm2010 (Page 1 of 2)

Inventory Assets

Barcode # CD0000778327 Barcode Type Existing interest asset Type Barcode # Released? Y

Unique Name

Default Location\*

Catalog Identifier\* 12010986 Commodity Asset Parents 0 Children 0 C/P/A

Manufacturer HEWLETT-PACKARD DEVELOPMENT COM Model Number LASERJET 6PXL

Description PRINTER, LASER, COLOR Model Name LASERJET

Serial Number USDH111233 Drawing No.

Initial Event PURCHASE User Fields\*

Asset Value\* \$675.00 Acquisition Date 11/05/1998 Responsibility Date

Asset Condition 1 NEW OR UNUSED Effective Date 01/07/2010 Expected Return Date

Utilization Code IN SERVICE Flags\* S O Activity Type AGENCY OWNED

Bureau or Region OS Property Accountability Office 51OASA

Cust Area 51OASAPPMD Accepted? Y Prop Custodian SUNFLOWER TEST2 CPPTTEST2

Contact ID AHOUSTON Last Name\* HOUSTON First ANNA Mid K

User AHOUSTON Last Name\* HOUSTON First ANNA Mid K

Location\* WASHINGTON DC BUILDING HCHB ROOM 2895

Document\* PURCHASE ORDER + P0987654

User Fields\*

Global User Fields\* EAR99

Agd1 Information Commodity Comment / Picture / Attachment Re-Request

The document supporting this action

Record: 1/1

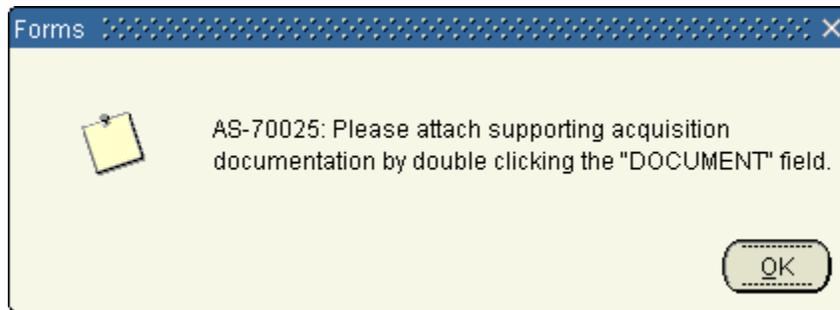
- Click the **Save** icon to save the asset record.

**End of activity.**



## Possible Error Message

1. If an asset tries to be saved and an attachment is not attached to the DOCUMENT field when certain Initial Events are selected the following error message will appear:



2. To resolve, double click in the **Document\*** field. The **Maintain Documents** screen is displayed.
3. Select the type of document you are going to attach from the **Type LOV** by clicking on the **LOV** button .
4. Click the **OK** button after you have made your selection. The selection is populated in the **Type** field.
5. Enter the document number in the **Doc. No.** field. The document number must be unique.
6. Select the document's storage from the **Storage Type** field.
  - a. **IMPORTANT: In order to attach a document you must change this to Internal**
7. Enter your Custodial Area in the **Organization** field. You may click on the **LOV** button  to display the list of values.
8. The **Comment/Picture/Attachment** button is enabled when you select **Internal** in the **Storage Type** field.
9. Click on the **Comment/Picture/Attachment** button. The **Capture Comments, Pictures and Attachments** screen is displayed.
10. Click on the **Attachments** tab. The **Attachments** tab is displayed.
11. Click on the **Add Attachment** button to add the attachment to the asset record. A new **Attachment Upload** window is displayed.
12. Click on the **Browse** button to find the attachment on your desktop or computer. This is similar to attaching a document to an email.
13. Enter a description for the attachment, for example Purchase Order, Invoice, etc., in the **Description** field.
14. Click the **Upload** button. A 'Successfully uploaded file' message is displayed.
15. Click the **OK** button when asked to Requery. The information from the attachment you uploaded is populated.
16. Click save to save the attachment
17. Click save to save the document.
18. Click save to save the asset.

**End of activity.**



## Initial Events and Document Types that Require Document Attachments

Initial Events Requiring Documents	Document Types
Purchase	ALL
Purchase Card	ALL
Bulk Purchase	ALL
Subject to Agreement	ALL
GSA Lease	ALL
Commercial Lease	ALL
Transferred In- From Other Agency	CD-50
Transferred In- From Other Agency	CD-509
Transferred In- From Other Agency	CD-52
Transferred In- From Other Agency	CONTRACT
Transferred In- From Other Agency	FEDSTRIP
Transferred In- From Other Agency	FORM DD1149 REQUISITION AND INVOICE/SHIPPING DOCUMENT
Transferred In- From Other Agency	FORM DD250 MATERIAL INSPECTION AND RECEIVING REPORT
Transferred In- From Other Agency	GSA FORM 1152
Transferred In- From Other Agency	NOAA 37-6
Transferred In- From Other Agency	ORDER (VENDOR GENERATED)
Transferred In- From Other Agency	PURCHASE CARD
Transferred In- From Other Agency	PURCHASE ORDER
Transferred In- From Other Agency	PURCHASE ORDER (REOCCURRING)
Transferred In- From Other Agency	PURCHASER'S RECEIPT
Transferred In- From Other Agency	SF-120 REPORT OF EXCESS PERSONAL PROPERTY
Transferred In- From Other Agency	SF-122 TRANSFER ORDER EXCESS PERSONAL PROPERTY
Transferred In- From Other Agency	SF-126 REPORT OF PERSONAL PROPERTY FOR SALE