# 🌻 IT COMPONENTS

*S*unflower IT Components is an innovative IT asset management solution that maximizes technology investments. Sunflower Enterprise Components is an integrated application to support critical IT initiatives such as migrations, software license compliance and end user support.

This chapter includes instructions for performing the user tasks supported by Sunflower Enterprise Components and also provides a variety of reports that are described in a separate sections. The tasks described in this section are performed by people with Manger or Clerk level permissions.

## KEY CONCEPTS

This chapter will include the following discussion points and concepts:

- About IT Components
- IT Components Menu Access
- Use Personal IT Component Groups
- Work with Asset IT Components
- Copy and Transfer IT Components
- Load Asset IT Components and Edit Uploaded Records
- IT Components Reports

## ABOUT THE IT COMPONENTS MODULE

The key features of the IT Components module include:

• A complete lifecycle solution, from planning and procurement through retirement and disposal

• A scalable, secure relational database

• A flexible, open architecture for easy integration with other open application systems

• Flexible interface layer for integration of external application systems

• Robust reporting capabilities

• Strong cost and financial management functionality

• Easy configuration, requiring no source code changes

• In-depth decision support information and functionality

# IT COMPONENTS MENU ACCESS

The Management module uses two roles to manage IT Components. These two roles are **IT Manager** and **IT Clerk**.

When assigning these roles to users, it is important to map out the functional responsibilities of the users and decide based on the tasks that each user must perform how to assign the appropriate application role. The table below lists menu access within the IT Component module based upon the IT Component roles.

| Menu Item | Role | |
|---|---|---|
| | IT Manager | IT Clerk |
| **Maintain Asset IT Components** | Yes | Yes |
| **Asset IT Components Summary and History** | Yes | Yes |
| **Asset List** | Yes | Yes |
| **Copy IT Components from Catalog** | Yes | Yes |
| **Copy IT Components from Asset** | Yes | Yes |
| **Transfer IT Components** | Yes | Yes |
| **Process Asset IT Components Interface Records** | Yes | -- |
| **Edit Asset IT Components Interface Records** | Yes | -- |
| **IT Component Reports** | Yes | Yes |

# USE PERSONAL IT COMPONENT GROUPS

Component groups are logical groupings of component types used to limit the types of components displayed on various screens. They are used for display purposes only and do not modify the database.

They can make it much easier to find the component users are looking for, by filtering out components that are not of interest. For example, if copying a component from one asset to another and users work in software, users probably don't need to see the hardware associated with the asset, just the software components. Therefore, users can use the Software Component Group to filter the displayed items, making it much easier to locate the components of interest.

There are two types of Component Groups, Default IT Component Groups, and Personal IT Component Groups. Anyone can use Default IT Component Groups, but only Administrators can create them. The following sections describe how to create and maintain personal IT component groups.

Maintain IT Component Groups

Because component groups do not affect the database, users can create any personal component groups to make the regular tasks easier to perform. Anyone can look at personal component groups, but only users can modify the ones that are created.

## DEFINE A NEW PERSONAL COMPONENT GROUP

Step 1. Navigate to the **Maintain IT Component Groups** form.

Step 2. When this page is opened, an automatic query is launched and all of the user's personal groups are displayed and the screen is in Insert mode.

Step 3. Press the **Insert Record** key.

Step 4. Type a **Code** for the new IT component group.

Step 5. Press the **Next Field** key.

Step 6. Type a **Description** for the new IT component group.

Step 7. Press the **Save** key.

NOTE: The new component group is saved and component types can now associated with it.

## ASSOCIATE IT COMPONENT TYPES WITH A PERSONAL COMPONENT GROUP

IT components groups have associated IT component types. These are the component types that are displayed whenever the group is selected. Users can create as many personal groups as they would like, to make the daily tasks easier.

**NAVIGATION**

- Click Admin

- Click IT Components

- Click Maintain IT Component Groups



Step 1. Navigate to the **Maintain IT Component Groups** form.

Step 2. When this page is opened, an automatic query is launched and all of the user's personal groups are displayed and the screen is in Insert mode.

Step 3. With the cursor in the **Code** field, use the **Next Record** and **Previous Record** keys to scroll through the existing groups until the desired group is displayed.

Step 4. The **Description** and all of the IT components associated with the selected group are displayed automatically.

Step 5. Place the cursor in the first empty field under **IT Components Code** or press the **Insert Record** key.

Step 6. If the **Code** of the component type to associate with this group is known, type it in this field and press the **Next Field** key.

Step 7. If the component type code is not known, press the **Display List** key and choose the desired code from the list.

Step 8. The **Description** field is automatically populated.

Step 9. Add as many component types as required in the same manner.

Step 10. Press the **Save** key when through adding component types.

## VIEW COMPONENT TYPES ASSOCIATED WITH ONE OF YOUR PERSONAL COMPONENT GROUPS

Step 1. Navigate to the **Maintain IT Component Groups** form.

Step 2. When this page is opened, an automatic query is launched and all of the user's personal groups are displayed and the screen is in Insert mode.

Step 3. To see the component types associated with a personal group, make sure the cursor is in the **Code** field, and use the **Next Record** and **Previous Record** keys to scroll through the existing groups until the desired group is displayed. All component types associated with the selected group are displayed.

## VIEW COMPONENT TYPES ASSOCIATED WITH SOMEONE ELSE'S PERSONAL GROUP

While a user cannot edit someone else's groups, they can view their groups and the associated IT component types.

Step 1. Navigate to the **Maintain IT Component Groups** form.

Step 2. When this page is opened, an automatic query is launched and all of the user's personal groups are displayed and the screen is in Insert mode.

Step 3. To see someone else's personal group, press the **Enter Query** key.

Step 4. Place the cursor in the **Last Name f**ield and delete the displayed value.

Step 5. Press the **Display List** key.

Step 6. Choose the desired user from the displayed list.

Step 7. Press the **Execute Query** key to search for all groups that belong to the selected user.

Step 8. Use the **Next Record** and **Previous Record** keys to scroll through the user's groups until the desired group, and its associated component types, is displayed.

## DELETE A COMPONENT TYPE FROM A PERSONAL COMPONENT GROUP

Component types can only be deleted from a user's own personal groups.

Step 1. Navigate to the **Maintain IT Component Groups** form.

Step 2. When this page is opened, an automatic query is launched and all of the user's personal groups are displayed and the screen is in Insert mode.

Step 3. With the cursor in the **Code** field, use the **Next Record** and **Previous Record** keys to scroll through the existing groups until the desired group is displayed. All component types associated with the selected group are displayed.

Step 4. When the desired group is displayed, select the **Component Type** to delete.

Step 5. Press the **Remove Record** key.

NOTE: The record is deleted from the screen.

Step 6. Press the **Save** key to commit the changes and delete the component type from the group.

## DELETE A PERSONAL COMPONENT GROUP

When a personal IT component group is deleted, of its existing associations with component types are automatically deleted at the same time. Because groups are only used for display purposes, users cannot harm anything by deleting a group.

Users can only delete their own personal groups.

Step 1. Navigate to the **Maintain IT Component Groups** form.

Step 2. When this page is opened, an automatic query is launched and all of the user's personal groups are displayed and the screen is in Insert mode.

Step 3. With the cursor in the **Code** field, use the **Next Record** and **Previous Record** keys to scroll through the existing groups until the desired group is displayed. All component types associated with the selected group are displayed.

Step 4. When the desired group is displayed, press the **Remove Record** key.

NOTE: The group is removed from the display.

Step 5. Press the **Save** key to commit the changes and delete the group from the database.
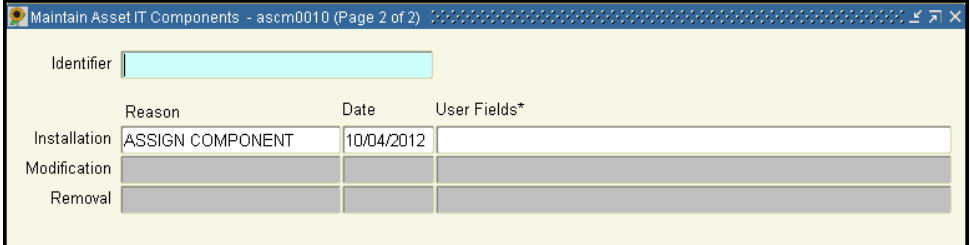
# WORK WITH ASSET IT COMPONENTS

Existing assets may have multiple IT components assigned to them. There are several tasks users can perform related to maintaining these components:

- View all existing IT components of an asset
- Define IT components for an asset
- Enter specific information for the installation of an IT Component
- Define attribute values for a new IT component of an asset
- Enter specific information for the modification of an IT Component
- Delete an IT component from an asset
- Enter specific information about the removal of a component from an asset
- Add an additional IT component to an asset
- Change attribute values for existing IT components of an asset
- Define or delete a tracking identifier for an asset's IT component

Maintain Asset IT Components

Usually, a manager will assign IT components to various existing assets by loading this information in a large batch. Users may need to add IT components or modify existing components. Use this function to manually assign IT components to an asset and maintain the IT components assigned to individual assets.

## VIEW ALL EXISTING IT COMPONENTS OF AN ASSET

Step 1. Navigate to the **Maintain Asset IT Components** form.

Step 2. Enter the asset's Interest Type. Either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list.

Step 3. Enter the Asset **Identifier**. If the Asset Identifier is unknown, press the **Enter Query** key and use the **Query Criteria** screen to search using any information that is known about the asset. When the query is executed, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the asset to update is displayed.

Step 4. Sunflower Enterprise Components automatically displays all components of the selected asset. The check mark in the **A** column indicates that an instance of the corresponding component type is assigned to the asset.

Step 5. In order to view additional information about a certain component, such as the specified tracking identifier or information related to installation and change events, select the component in question and press the **Next Block** key or the **Page 2** button on the bottom of the screen.

Step 6. A new window opens and overlays the top half of **Page 1**.

Step 7. The **Page 2** of this screen displays a component's tracking **Identifier**. Furthermore, it captures and displays information that is related to Installation and the most recent Modification of the selected component. Regarding information about the Removal of a component from an asset, this screen only allows users to enter the specific information but it won't display any information about the component, after it has been deleted from the asset. Each of these three events will be described with the reason, the date and user defined fields.

Step 8. There are two ways to return the control to **Page 1** of this screen:

- Press the **Exit** key to close the window and return to **Page 1** of the screen.
- Press the **Previous Block** key to keep the window open but make **Page 1** the active page.

Like this users can select another component and then view its tracking identifier and information related to installation and change events.

## DEFINE IT COMPONENTS FOR AN ASSET

**Step 1.** Navigate to the **Maintain Asset IT Components** form.

**Step 2.** Access the desired asset. There are two ways to do this:

• Enter the Interest Type, either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically.

• If the Asset **Identifier** is unknown, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information known about the asset. When executing the query, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the desired asset is displayed.

**Step 3.** By default, the **IT Components** section of the screen shows all components currently assigned to the asset. If the selected asset doesn't have any components assigned to it yet, the **IT Components** section of the screen is blank.

**Step 4.** Add all components appropriate for the asset. There are several ways to do this:

• Choose **Show All Component Types** to display all available component types and select the A checkboxes next to each component that should be part of the asset's component configuration. If

there is a known **Group** that contains the component type of interest, users can use the **Group** pull-down menu to reduce the number of component types displayed.

NOTE: Each group has a specified set of component types that it displays. In this case, when a specific group is selected, the only component types displayed are those that are associated with the selected group. For example, if the Software Group is chosen, none of the possible hardware component types appear in the list.

- Press the **Insert Record** key and type the name of the component type and select the **A** checkbox for the line item or press the **Next Field** key.

- Press the **Insert Record** key then place the cursor in the **Type** field and press the **Display List** key and choose the component type from the displayed list. Select the **A** checkbox for the line item or press the **Next Field** key.

NOTE: Assigning a new component to an asset will generate a record with installation information by default. But users can also update the installation information any time later on.

Step 5. Press **Save**.

# ENTER SPECIFIC INFORMATION FOR THE INSTALLATION OF AN IT COMPONENT

**Step 1.** Navigate to the **Maintain Asset IT Components** form.

**Step 2.** In order to enter installation information for a component that was just assigned to an asset, skip to Step 6.

**Step 3.** Access the desired asset. There are two ways to do this:

• Enter the Interest Type, either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically.

• If the Asset **Identifier** is unknown, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information users know about the asset. When the query is executed, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the desired asset is displayed.

**Step 4.** By default, the **IT Components** section of the screen shows all components currently assigned to the selected asset. The check mark in the **A** column indicates that an instance of the component type is assigned to the asset. Use the **Group** pull-down menu to select a group to use as a restrictive filter, to make it easier to find the component type of interest.

NOTE: Each group has a specified set of component types that it displays. When a group is selected, the only component types displayed are those that are assigned to the asset and are associated with the selected group. For example, if the Software Group is chosen, no hardware components of the asset appear in the list.

Step 5. Select the component to update the installation information.

Step 6. Press the **Next Block** key or the **Page 2** button on the bottom of the screen to display additional information related to installation and change events for the selected component.



Step 7. **Page 2** of this screen captures and displays information that is related to Installation, Modification and Removal of the selected component. Each of these three events will be described with the reason, the date and user defined fields.

Step 8. At the time of assigning the component to the asset, a default value was automatically entered for the Installation of the component. This default value is based on the actual transaction that assigned the component to the asset, such as a copying the component from another asset. Verify that the appropriate installation **Reason** is shown. This installation reason may be updated any time:

• If the name of the installation reason is unknown, press the **Display List** key and choose the installation from the list.

• Press the **Next Field** key.

Step 9. At the time of assigning the component to the asset, the system date was automatically entered as the date and time as of which the component should be effective for the this asset.

• To enter an earlier date as the effective date and time chosen by default, users may overwrite the displayed value. However, users are not allowed to future-date the date of the installation.

• Press the **Next Field** key.

Step 10. To enter values for user defined fields that have been defined for the selected Installation, place the cursor in the complex field **User Fields** in the line of the installation data and press the **Edit** key. All of the installation's **User Fields** are displayed in a new window.

• Type the appropriate values for the user defined fields of the selected installation.

- Press the **Save** key to return back to **Page 2**. The contents of the user fields are displayed in the complex field.

Step 11. There are two ways to return the control to **Page 1** of this screen:

- Press the **Exit** key to close the window and return to **Page 1** of the screen.

- Press the **Previous Block** key to keep the window open but make **Page 1** the active page. Like this users can select another component and then view its information related to installation and change events.

## DEFINE ATTRIBUTE VALUES FOR A NEW IT COMPONENT OF AN ASSET

Step 1. Navigate to the **Maintain Asset IT Components** form.

Step 2. In order to access the asset that just added a new IT component to define attribute values for this new component, skip to step 6.

Step 3. Access the desired asset. There are two ways to do this:

• Enter the Interest Type, either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically.

• If the Asset **Identifier** is unknown, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information users know about the asset. When users execute the query, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the desired asset is displayed.

Step 4. By default, the **IT Components** section of the screen shows all components currently assigned to the selected asset. The check mark in the **A** column indicates that an instance of the component type is assigned to the asset. Use the **Group** pull-down menu to select a group to use as a restrictive filter, to make it easier to find the component type of interest.

NOTE: Each group has a specified set of component types that it displays. When a group is selected, the only component types displayed are those that are assigned to the asset and are associated with the selected group. For example, if the Software Group is chosen, no hardware components of the asset appear in the list.

Step 5. With the cursor in the Attributes field of the component users want to update, press the Edit key.

All of the component's Attributes are displayed in a new window.



Step 6. Type the appropriate values for the component attributes.

Step 7. Press the **Save** key. The main screen opens and this component's attribute values are listed.

Step 8. If the new assigned component *has not yet been saved*, the defining of the attributes values is considered part of the installation process and users may enter specific information about this installation.

If the new assigned component *has been saved*, defining the attribute values for this component is considered a modification of the component for which originally no attribute settings were specified.

NOTE: Changing the attribute settings for a component of an asset will generate a record with information about the modification by default. But users can also update the modification information any time later on.

Step 9. Repeat steps 6-8 to enter attribute values for other components, if needed.

Step 10. Press the **Save** key.

# ENTER SPECIFIC INFORMATION FOR THE MODIFICATION OF AN IT COMPONENT

**Step 1.** Navigate to the **Maintain Asset IT Components** form.

**Step 2.** In order to enter modification information for a component that was just updated, skip to Step 6.

**Step 3.** Access the desired asset. There are two ways to do this:

• Enter the Interest Type, either type the Interest Type identifier, or press the Display List key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically.

• If the Asset **Identifier** is unknown, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information known about the asset. When executing the query, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the desired asset is displayed.

**Step 4.** By default, the **IT Components** section of the screen shows all components currently assigned to the selected asset. The check mark in the **A** column indicates that an instance of the component type is assigned to the asset. Use the **Group** pull-down menu to select a group to use as a restrictive filter, to make it easier to find the component type of interest.

NOTE: Each group has a specified set of component types that it displays. When a group is selected, the only component types displayed are those that are assigned to the asset and are associated with the selected group. For example, if the Software Group is chosen, no hardware components of the asset appear in the list.

Step 5. Select the component to update the modification information.

Step 6. Press the **Next Block** key or the **Page 2** button on the bottom of the screen to display additional information related to installation and change events for the selected component.



Step 7. **Page 2** of this screen captures and displays information that is related to **Installation**, **Modification** and **Removal** of the selected component. Each of these three events will be described with the reason, the date and user defined fields.

NOTE: The displayed Modification information is always related to the most recent change of the component, i.e., update of attribute settings or tracking identifier.

Step 8. At the time of updating attribute settings or tracking identifier for the selected component, a default reason was automatically entered for the **Modification** of the component. This default reason for the modification is a fixed system value and cannot be changed.

Step 9. At the time of the most recent change of attribute settings or tracking identifier of the selected component, the system **Date** was automatically entered as the date as of which the latest change of the component should be effective.

• In order to enter an earlier date as the effective date and time chosen by default, the displayed value may be overwritten. However, users are not allowed to future-date the **Date** of the modification.

• Press the **Next Field** key.

Step 10. To enter values for user defined fields for the most recent modification, place the cursor in the complex field **User Fields** in the line of the modification data and press the **Edit** key. All of the modification's **User Fields** are displayed in a new window.

• Type the appropriate values for the user defined fields of the modification.

• Press the **Save** key to return back to **Page 2**. The contents of the user fields are displayed in the complex field.

Step 11. There are two ways to return the control to **Page 1** of this screen:

• Press the **Exit** key to close the window and return to **Page 1** of the screen.

• Press the **Previous Block** key to keep the window open but make **Page 1** the active page. Like this users can select another component and then view its information related to installation and change events.

## DELETE AN IT COMPONENT FROM AN ASSET

**Step 1.** Navigate to the **Maintain Asset IT Components** form.

**Step 2.** Access the desired asset. There are two ways to do this:

• Enter the Interest Type, either type the Interest Type identifier, or press the Display List key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically.

• If the Asset **Identifier** is unknown, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information known about the asset. When executing the query, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the desired asset is displayed.

**Step 3.** By default, the **IT Components** section of the screen shows all components currently assigned to the selected asset. The check mark in the **A** column indicates that an instance of the component type is assigned to the asset. Use the **Group** pull-down menu to select a group to use as a restrictive filter, to make it easier to find the component type of interest.

NOTE: Each group has a specified set of component types that it displays. When a group is selected, the only component types displayed are those that are assigned to the asset and are associated with the selected group. For example, if the Software Group is chosen, no hardware components of the asset appear in the list.

Step 4. Click the checkbox to deselect the checkmark **A** next to the component to be deleted from the asset.

NOTE: Use the **Group** pull-down menu to choose a filter and limit the component types displayed, making it easier to find the component users want to delete.

Step 5. Any specific information about the removal of this component from the asset at this time must be entered before saving these changes. After pressing the **Save** key, the component will not appear as part of the asset's current configuration and users cannot make any more changes to it.

NOTE: Removing a component from an asset will generate a record with removal information by default. If order to update this information, updates must be made prior to finalizing the removal by pressing the Save key.

Step 6. Press the **Save** key.

## ENTER SPECIFIC INFORMATION ABOUT THE REMOVAL OF A COMPONENT FROM AN ASSET

Information about the removal of a component from an asset may only be entered after the corresponding component type has been deselected and before the changes have been saved.

NOTE: Therefore it must be assumed that the particular asset from which the component is to be removed has already been accessed on the Maintain Asset IT Components screen and the component in questions has already been deselected for removal from the asset.

Step 1. Select the component that has been deselected for removal from the asset.

Step 2. Press the **Next Block** key or the **Page 2** button on the bottom of the screen to display additional information related to installation and change events for the selected component.

Step 3. The **Page 2** of this screen captures and displays information that is related to **Installation**, **Modification** and **Removal** of the selected component. Each of these three events will be described with the reason, the date and user defined fields.

Step 4. At the time of deselecting a component for removal from the asset, a default reason was automatically entered for the **Removal** of the component. Verify that the appropriate removal reason is shown.

Users may update this removal reason:

• If the name of the removal reason users are looking for is unknown, press the **Display List** key and choose the removal from the list.

• Press the **Next Field** key.

Step 5. At the time of deselecting a component for removal from the asset, the system **Date** was automatically entered as the date of the removal of this component should be effective for the asset.

• If wanting to enter an earlier date as the effective date and time chosen by default, users may overwrite the displayed value. However, users are not allowed to future-date the Date of the removal.

• Press the **Next Field** key.

Step 6. To enter values for user defined fields for the removal, place the cursor in the complex field **User Fields** in the line of the removal data and press the **Edit** key. All of the removal's **User Fields** are displayed in a new window.

• Type the appropriate values for the user defined fields of the removal.

• Press the **Save** key to return back to **Page 2**. The contents of the user fields are displayed in the complex field.

Step 7. There are two ways to return the control to **Page 1** of this screen:

• Press the **Exit** key to close the window and return to **Page 1** of the screen.

- Press the **Previous Block** key to keep the window open but make **Page 1** the active page. Like this users can select another component and then view its information related to installation and change events.

Step 8. Press the **Save** key.

## ADD AN ADDITIONAL IT COMPONENT TO AN ASSET

Step 1. Navigate to the **Maintain Asset IT Components** form.

Step 2. Access the desired asset. There are two ways to do this:

•    Enter the Interest Type, either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically.

•    If users don't know the Asset **Identifier**, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information users know about the asset. When users execute the query, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the desired asset is displayed.

Step 3. By default, the **IT Components** section of the screen shows all components currently assigned to the selected asset. The check mark in the **A** column indicates that an instance of the component type is assigned to the asset. Users can use the **Group** pull-down menu to select a group to use as a restrictive filter, to make it easier to find the component type of interest.

NOTE: Each group has a specified set of component types that it displays. When a group is selected, the only component types displayed are those that are assigned to the asset and are associated with the selected group. For example, if the Software Group is chosen, no hardware components of the asset appear in the list.

Step 4. Add all components appropriate for the asset. There are several ways to do this:

- Choose **Show All Component Types**. If this option is selected, all possible component types are displayed, including those that are not assigned to the asset. All assigned component types have a (check mark) in the field marked **A** and are listed first. Unassigned component types are listed last. Select the **A** checkbox to assign an instance of a new component type to the asset.

NOTE: Use the Group box in conjunction with the Show All Component Types option. For example, if users need to add several software programs, check Show All Component Types and choose Software from the Group menu. This way, all possible software programs are displayed and all users need to do is select the ones users want to add.

- Press the **Insert Record** key and type the name of the component type. Select the **A** checkbox for the line item or press the **Next Field** key.

- Press the **Insert Record** key then place the cursor in the **Type** field and press the **Display List** key and choose the component type from the displayed list. Select the **A** checkbox for the line item or press the **Next Field** key.

NOTE: Assigning a new component to an asset will generate a record with installation information by default. But users can also update the installation information any time later on.

Step 5. Press the **Save** key.

# CHANGE ATTRIBUTE VALUES FOR EXISTING IT COMPONENTS OF AN ASSET

**Step 1.** Navigate to the **Maintain Asset IT Components** form.

**Step 2.** Access the desired asset. There are two ways to do this:

• Enter the Interest Type, either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically.

• If users don't know the Asset **Identifier**, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information users know about the asset. When users execute the query, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the desired asset is displayed.

**Step 3.** By default, the **IT Components** section of the screen shows all components currently assigned to the selected asset. The check mark in the **A** column indicates that an instance of the component type is assigned to the asset. Users can use the **Group** pull-down menu to select a group to use as a restrictive filter, to make it easier to find the component type of interest.

NOTE: Each group has a specified set of component types that it displays. When a group is selected, the only component types displayed are those that are assigned to the asset and are associated with the selected group. For example, if the Software Group is chosen, no hardware components of the asset appear in the list.

Step 4. With the cursor in the **Attributes** field of the component to update, press the **Edit** key. All of the component's **Attributes** are displayed in a new window.



Step 5. Make the desired changes.

Step 6. Press the **Save** key. The main screen opens and the component's attribute values are listed in the complex field.

NOTE: Changing the attribute settings for a component of an asset will generate a record with information about the modification by default. Users can also update the modification information any time later on.

Step 7. Repeat steps 5-6 to update attribute values for other components, if needed.

Step 8. Press the **Save** key.

## DEFINE OR DELETE A TRACKING IDENTIFIER FOR AN ASSET'S IT COMPONENT

Step 1. Navigate to the **Maintain Asset IT Components** form.

Step 2. Access the desired asset. There are two ways to do this:

• Enter the Interest Type, either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically.

• If users don't know the Asset **Identifier**, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information users know about the asset. When users execute the query, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the desired asset is displayed.

Step 3. By default, the **IT Components** section of the screen shows all components currently assigned to the selected asset. The check mark in the **A** column indicates that an instance of the component type is assigned to the asset. Use the **Group** pull-down menu to select a group to use as a restrictive filter, to make it easier to find the component type of interest.

NOTE: Each group has a specified set of component types that it displays. When a group is selected, the only component types displayed are those that are assigned to the asset and are associated with the selected group. For example, if the Software Group is chosen, no hardware components of the asset appear in the list.

Step 4. Select the component to update.

Step 5. Press the **Next Block** key or the **Page 2** button on the bottom of the screen to display additional information for the selected component.



Step 6. Enter or delete the Identifier value.

Step 7. Press the **Save** key.

NOTE: If the component is of a type that requires a unique identifier, users will see an error message when users try to save the changes in the following cases:

• If users enter an identifier value that already exists for another instance of this component type, assigned to another asset.

• If users delete the identifier for a component of a type that requires a unique identifier.

Step 8. There are two ways to return the control to Page 1 of this screen:

• Press the Exit key to close the window and return to Page 1 of the screen.

• Press the Previous Block key to keep the window open but make Page 1 the active page. Like this users can select another component and then view its information related to installation and change events.

NOTE: Changing the tracking identifier of an asset's component will generate a record with information about the modification by default. But users can also update the modification information any time later on.

Step 9. Repeat steps 5-7 to enter attribute values for other components, if needed.

Step 10. Press the **Save** key.

## COPY AND TRANSFER IT COMPONENTS

There are three screens that enable users to copy or transfer the components from one item to another. When users perform these actions, all of the information associated with the selected component is added to the new item.

• Copy IT Components from Asset

• Copy IT Components from Catalog

• Transfer IT Components

## COPY IT COMPONENTS FROM ASSET

Use this screen to copy components from one asset to one or more different assets. For example if an existing asset has many of the components that will exist in a new asset, users can copy the component information from the existing asset to the new asset. This way, users don't need to create the new asset from scratch and repeat existing efforts. The source asset's component setup will not be affected by this transaction.

Step 1. Navigate to the **Copy IT Components From Asset** form.

Step 2. Select the source asset from which to copy components to another asset. There are two ways to do this:

• Enter the Interest Type, either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically.

• If the Asset **Identifier** is unknown, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information users know about the asset. When users execute the query, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the desired asset is displayed.

Step 3. Sunflower displays all components assigned to the selected asset. By default, all components are preselected to be copied (there is a (check mark) next to the component).

Step 4. Use the **Group** filter to limit the number of component types displayed.

Each group has a specified set of component types that it displays.When a group is selected, the only components displayed are those that are assigned to the asset and are associated with the selected group. For example, if the Software Group is chosen, no hardware components of the asset appear in the list.

NOTE: If a component is not listed on this screen it will not be included in the transaction. This means that if users use the Group filter to limit the number of component types displayed less components will be preselected for the copy transaction.

NOTE: Make sure to use the scroll bar to view all components assigned to the selected asset.

Step 5. Make sure that the **Copy** column only shows a (check mark) next to the components to copy. Click the checkmark to deselect components that should not be copied.

NOTE: If a component is of a component type that has the Unique Identifier flag set to Yes, the component cannot be copied because it can't exist in two places with the same identifier, and the identifier cannot be NULL.

Step 6. Users may update the date on which the components to be copied will be effective for the new asset(s). By default, the system date is used as the effective date.

Step 7. In the bottom section of the screen, labeled **Target Assets**, select the asset or assets to copy the selected components. There are two ways to do this:

• To select one or more target assets, enter the Interest Type, either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically. A check mark next to the asset indicates that this asset should receive the selected components.

• If the Asset **Identifier** is unknown, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information users know about the asset. The query returns all matching assets. By default, all assets are marked to receive the selected components.

NOTE: The query will return all matches to the search parameters. Since only three assets are shown on the screen, make sure to use the vertical scroll bar to view all returned assets and deselect the check mark for assets that should not receive the selected components.

**Step 8.** Make sure there is a check mark next to each asset to copy components to.

**Step 9.** Press the **Save** key.

**Step 10.** If any errors occur, a red flag appears next to the affected asset.

NOTE: There are two types of errors, component level, and asset level. A component level error usually occurs when users try to copy a component of a type that requires a unique identifier. An asset level error usually occurs when users do not have permission to update the target asset.

**Step 11.** Press the **Message** button to open a new pane and see which transactions were completed and which ones were not.

**Step 12.** All components without errors will copy, and the ones with errors will not.

Copying components from one asset to another asset is considered a form of installing components to a new asset.When performing this copy function, Sunflower automatically generates a record in the background to save information about this installation, such as the installation reason and the date.

NOTE: Users may update the installation information and enter the corresponding user fields anytime later on.

## COPY IT COMPONENTS FROM CATALOG

Use the Copy IT Components from Catalog screen to copy components from a catalog item to an asset. For example if a catalog item is set up with many of the components that will exist in a new asset, users can copy the components from the catalog item to the new asset. This way, users don't need to create the new asset from scratch and repeat existing efforts.

**Step 1.** Navigate to the **Copy IT Components From Catalog** form.

**Step 2.** Select the Catalog Item to work with. Either type the **Manufacturer** and **Model Number** or press the **Execute Query** key to search for the desired item. When executing the query, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the catalog item users want to copy from is displayed.

**Step 3.** Place the cursor in the **Configuration** field and use the P**revious Record** and **Next Record** keys to locate the desired configuration.

**Step 4.** Sunflower displays all components associated with the selected configuration.

**Step 5.** By default, all components are preselected to be copied (there is a (check mark) next to the component).

Step 6. Use the **Group** filter to limit the number of component types displayed. Each group has a specified set of component types that it displays.When a group is selected, the only components displayed are those that are assigned to the configuration of the catalog item and are associated with the selected group. For example, if the Software Group is chosen, no hardware components of the configuration appear in the list.

NOTE: If a component is not listed on this screen it will not be included in the transaction. This means that if users use the Group filter to limit the number of component types displayed less components will be preselected for the copy transaction.

NOTE: Make sure to use the scroll bar to view all components assigned to the selected configuration of the catalog item.

Step 7. Make sure that the **Copy** column only shows a (check mark) next to the components users want to copy. Click the checkmark to deselect components that should not be copied.

NOTE: If a component is of a component type that has the Unique Identifier flag set to Yes, the component cannot be copied because it can't exist in two places with the same identifier, and the identifier cannot be NULL.

Step 8. Users may update the date on which the components to be copied will be effective for the new asset(s). By default, the system date is used as the effective date.

Step 9. In the bottom section of the screen, labeled **Assets**, select the asset or assets to which to copy the selected components. There are two ways to do this:

•   To select one or more assets, enter the Interest Type, either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically. A check mark next to the asset indicates that this asset should receive the selected components.

•   If the Asset **Identifier** is unknown, press the **Enter Query** key use the **Query Criteria** screen to search using any information users know about the asset. The query returns all matching assets. By default, all assets are marked to receive the selected components.

NOTE: The query will return all matches to the search parameters. Since only three assets are shown on the screen, make sure to use the vertical scroll bar to view all returned assets and deselect the check mark for assets that should not receive the selected components.

**Step 10.** Make sure there is a check mark next to each asset to which to copy components.

**Step 11.** Press the **Save** key.

**Step 12.** If any errors occur, a red flag appears next to the affected asset.

NOTE: There are two types of errors, component level, and asset level. A component level error usually occurs when users try to copy a component of a type that requires a unique identifier. An asset level error usually occurs when users do not have permission to update the target asset.

**Step 13.** Press the **Message** button to open a new pane and see which transactions were completed and which ones were not.

**Step 14.** All components without errors will copy, and the ones with errors won't. Copying components from a catalog item's configuration to another asset is considered a form of installing components to a new asset. When performing this copy function, Sunflower automatically generates a record in the background to save information about this installation, such as the installation reason and the date.

NOTE: Users may update the installation information and enter the corresponding user fields anytime later on.

# TRANSFER IT COMPONENTS

Use this screen to transfer components from one asset to another asset. This transaction deletes component information from the target asset and adds the component information to the new asset.

Step 1. Navigate to the **Transfer IT Components** form.

Step 2. Select the source asset from which to transfer components to another asset. There are two ways to do this:

• Enter the Interest Type, either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically.

• If the Asset **Identifier** is unknown, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information users know about the asset. When executing the query, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the desired asset is displayed.

Step 3. Sunflower displays all components assigned to the selected asset. By default, all components are preselected to be transferred—there is a check mark in the **Xfer** column, next to the component.

Step 4. Use the **Group** filter to limit the number of component types displayed. Each group has a specified set of component types that it displays.When a group is selected, the only components displayed are those that are assigned to the asset and are associated with the selected group. For example, if the Software Group is chosen, no hardware components of the asset appear in the list.

NOTE: If a component is not listed on this screen it will not be included in the transaction. This means that if users use the Group filter to limit the number of component types displayed less components will be preselected for the transfer transaction.

NOTE: Make sure to use the scroll bar to view all components assigned to the selected asset.

Step 5. Make sure that the **Xfer** column only shows a (check mark) next to the components users want to transfer. Click the checkmark to deselect components that should not be transferred.

Step 6. In the bottom section of the screen, labeled **To Asset**, select the asset for which to transfer the selected components. There are two ways to do this:

• Enter the Interest Type, either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically.

• If the Asset **Identifier** is unknown, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information users know about the asset. When users execute the query, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the desired asset is displayed.

Step 7. Transferring components from one asset to another asset is considered a form of installing a component to an new asset. When performing this transfer function, Sunflower automatically generates a record in the background to save information about this installation. Users may enter additional information in the transfer user fields at the bottom of the screen.

NOTE: Users may update the installation information and enter the corresponding user fields anytime later on.

Step 8. By default, the system date is used as the date on which the transferred component(s) are effective for the new asset. Users may update the displayed **Effective Date** by entering an earlier date.

NOTE: Users may update the installation information and enter the appropriate date anytime later on.

Step 9. Press the **Save** key.

NOTE: If any errors occur, a red flag appears next to the corresponding component. If users do not have permission to update the target asset, all components involved in this transaction will show the error flag.

Step 10. Press the **Message** button to open a new pane and see which transactions were completed and which ones were not.

Step 11. All components without errors will be transferred, and the ones with errors will not.

## ACCESS ASSET IT COMPONENT INFORMATION

Sunflower Enterprise provides two different lookup screens that provide the following:

• A summary and history of the IT component configuration of a selected asset—lists an asset's component configuration as of a specified effective date. This is the first page of the Asset IT Components Summary and History screen. Users can launch this screen for a specific asset from any Sunflower Enterprise screen.

• A history of a specific component assigned to a specific asset—lists all change records for a specific component assigned to a specific asset. This is the second page of the Asset IT Components Summary and History screen.

• A list of all assets meeting specified criteria—users can use this screen to launch any of the Maintain Asset screens, the Maintain Asset IT Components screen, the Asset Summary and History screen, or the IT Component Summary and History screen for any or all of the displayed assets.

Asset IT Components Summary and History

This screen has two pages. The first shows all IT components assigned to the asset as of a chosen Effective Date, thus displaying current and historical component configurations of an asset. Users can open this screen from any other screen by selecting an asset and pressing the IT Component Summary and History button in the toolbar at the top of the screen.

The second screen shows the history of changes made to specific component of the selected asset, from the component's initial installation to the asset through its most recent change or removal from the asset.

## SHOW CURRENT AND HISTORICAL COMPONENT CONFIGURATIONS OF AN ASSET

Step 1. Navigate to the **IT Component Summary and History** form. There are two ways to do this:

• Select the asset on the current screen and press the I**T Component Summary and History** button in the toolbar. If users choose this method, the screen will open with the selected asset displayed. Skip to Step 3.

• Choose **IT Components > IT Component Summary and History**.

Step 2. Select the asset of interest. There are two ways to do this:

• Enter the Interest Type, either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically.

• If the Asset **Identifier** is unknown, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information users know about the asset. When executing the query, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the **Previous Record** and **Next Record** keys to navigate through the retrieved records until the desired asset is displayed.

Step 3. Choose an **Effective Date.**

• For the summary of the asset's current IT components, select **CURRENT** from the LOV.

- To view a historical component configuration of the asset, select one of the he effective dates listed in descending order in the LOV. Effective dates are dates on which changes were made to the asset's component configuration, such as adding new components, or updating existing component data. Terminating events such as deleting or transferring a component do not create a new change record, and only end the component's change history for the specific asset, therefore, these effective dates are not listed.

Step 4. Sunflower displays all components that were part of the configuration as of the selected date.

Step 5. Use the **Group** filter to limit the components displayed to the types in which the user interested.

NOTE: Each group has a specified set of component types that it displays. When a group is selected, the only components displayed are those that are assigned to the asset and are associated with the selected group. For example, if the Software Group is chosen, no hardware components of the asset appear in the list.

## SHOW THE HISTORY FOR A SPECIFIC COMPONENT OF A SPECIFIC ASSET

The second page of the IT Component Summary and History screen shows the history of changes made to a specific component of a specific asset, from the initial installation of the component to the specified asset to the most recent change or removal of the component from the asset.

**Step 1.** Navigate to the **IT Component Summary and History** form. There are two ways to do this:

• Select the asset on the current screen and press the **IT Component Summary and History** button in the toolbar. If users choose this method, the screen will open with the selected asset displayed. Skip to Step 3.

• Choose **IT Components > IT Component Summary and History**.

**Step 2.** Select the asset of interest. There are two ways to do this:

• Enter the Interest Type, either type the Interest Type **Identifier**, or press the **Display List** key and choose from the displayed list. Enter the Asset **Identifier**. Press the **Next Field** key. The catalog information of the specified asset will be filled in automatically.

• If users don't know the Asset **Identifier**, press the **Enter Query** key in order to use the **Query Criteria** screen to search using any information users know about the asset. When users execute the query, all matching records are returned. If there are more than one matching records, the first matching record is displayed. Use the P**revious Record** and **Next Record** keys to navigate through the retrieved records until the desired asset is displayed.

Step 3. Choose an Effective Date.

- For the summary of the asset's current IT components, select **CURRENT** from the LOV.

- To view a historical component configuration of the asset, select one of the he effective dates listed in descending order in the LOV. Effective dates are dates on which changes were made to the asset's configuration, such as adding new components, or updating existing component data. Terminating events such as deleting or transferring a component do not create a new change record, and only end the component's change history, therefore, these effective dates are not listed.

Step 4. Sunflower displays all components that were part of the configuration as of the selected date.

Step 5. Use the **Group** filter to limit the components displayed to the types in which users are interested.

NOTE: Each group has a specified set of component types that it displays. When a group is selected, the only components displayed are those that are assigned to the asset and are associated with the selected group. For example, if the Software Group is chosen, no hardware components of the asset appear in the list.

Step 6. Select the component for which users want to view history and change records and press the **Next Block** key. For example, if a specific component is listed in the configuration for a certain effective date, but does not show as a part of the configuration of the next chronological effective date, users may find information about the component's removal from the asset by selecting the component in configuration as of the first date and opening the second page of the screen.

Step 7. This screen shows all change records that have been written for a specific component over its entire lifetime within the selected asset. The type of the component in question is displayed at the top of the screen. On the upper half of the screen, information about the component's Installation to the asset and, in case the component doesn't exist any longer within the selected asset, about its **Removal** are displayed. This information about installation and removal include the reason and date of the event, as well as contents of user fields defined for the specific reason.

Step 8. On the bottom of the screen, all change records of the selected component are listed in descending order of their effective date. The most recent change record displays first, the change record created during the initial installation of the component to the asset displays last. Each change record for this component is displayed with the **Date** of its effective date and the current properties of the component (Identifier and Attributes) as of this effective date.

To receive more information about a particular modification of the component, select the corresponding change record. On the bottom of the screen, contents of the **Modification User Fields** related to that specific change event are displayed.

## ASSET LIST

Use this screen as a starting off place to work on or review multiple assets on an asset or IT component level. Users can perform a query for assets matching specific criteria. For example, all assets assigned to a specific steward. Then, select an asset from the list and launch the associated Maintain Asset or Maintain IT Component screen (or a summary and history screen), make the necessary changes, and automatically return to the list of assets after saving and closing the previous screen.

NOTE: User privileges will determine if they are allowed to open a Maintain screen for the selected asset.

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

Step 2. Select which Interest Type(s) users are interested in and if Subset Assets should be included. Users may choose multiple interest types. The subsequent search will only consider those assets that comply with the selection.

Step 3. Press the **Enter Query** key and use the **Query Criteria** screen to search for assets using any information. When users execute the query, all matching records are returned and displayed.

Step 4. Select the desired asset. From here, users can open one of four screens:

• To maintain the asset, press the **Asset** button at the bottom of the screen.The **Maintain Asset** screen for the appropriate interest type opens, with the selected asset displayed. Users can make

necessary changes, and when users close the screen, users will be returned to the Asset List so users can choose another asset to work. For information on working with the Maintain screen, see the **Sunflower Assets Help**.

• To maintain the IT components of an asset, press the **IT Components** button at the bottom of the screen. The **Maintain IT Components** screen opens with the selected asset displayed. Users can make necessary changes, and when users close the screen, users will be returned to the Asset List so users can choose another asset to work.

• To review the summary and history of a selected asset, press the **Summary and History** button in the toolbar. The **Asset Summary and History** screen for the appropriate interest type opens, with the selected asset displayed. For information on the Summary and History screen, see the **Sunflower Assets Help**.

• To review the component related summary and history of a selected asset, press the **IT Component Summary** and **History** button in the toolbar. The **Asset IT Components Summary and History** screen opens, with the selected asset displayed.

# LOAD ASSET IT COMPONENTS AND EDIT UPLOADED RECORDS

## PROCESS ASSET IT COMPONENT INTERFACE RECORDS

The Process Asset IT Component Interface Records form can be used for two different functions, to perform bulk uploads of records that:

• Add new IT component information to existing assets.

• Update asset IT component information that already exists in the system. In each case, users are uploading complete IT component information that includes all pertinent information such as component types, attribute values, corresponding event information, and so on.

NOTE: All of the IT component types, attribute definitions, and other parameters must be defined in the system before they can be used in an upload.

## LOAD RECORDS THROUGH THE ASSET IT COMPONENT INTERFACE

Step 1. From the **IT Components** menu, select **Process Asset IT Component Interface Records**.

Step 2. In the **Load Group** field, enter the source identifier of the interface records.

Step 3. If users don't know the load group identifier, press the **Display List** key for a list of source load groups and select one from the list.

Step 4. Press the **Save** key to load the records.

## EDIT ASSET IT COMPONENT INTERFACE RECORDS

Use the Edit IT Component Interface Records function to clean up erroneous records mass loaded into the system.When users save the record, the system automatically reloads it.

**NAVIGATION**

• Click IT Components

• Click Edit Asset IT Component Interface Records



Step 1. Navigate to the **Edit Asset IT Component Interface Records** form.

Step 2. To retrieve all records with errors, from all load groups, place the cursor in the **Load Group** field and press the **Execute Query** key. All records that have errors are returned.

Step 3. To select a specific **Load Group**, press the **Enter Query** key and then the **Display List** key and choose the desired load group from the list.

Step 4. Use the **Previous Record** and **Next Record** keys to navigate to the desired record. The A**dd Component** and **Update Component** radio button indicates which action the selected record attempted to perform.

Step 5. The screen displays the contents of all fields of the selected record: The **Interest Type Prefix**, the **Interest Type** and the **Asset Identifier** of the asset for which information should be uploaded. Also, the **Component Type** and **Tracking Identifier** of the asset's component that should be added or updated. The **Date** field shows the date and time as of which the component information is effective.

Step 6. The **Attributes** tab shows the content of all user defined fields that exist for the component type in question. The **Event** tab will show the reason of the event as well as any contents of user defined fields for that event. If the **Add Component** radio button is selected, the event information will refer to an installation, if the **Update Component** radio button is selected, the event information will refer to a modification.

Step 7. Press the **Go To Error** button to find the error in the record. The cursor will be automatically positioned in the first field with erroneous content.

Step 8. Correct the error. For example, if the reason for the event is not a valid component event type, press the Edit key in the field to bring up the LOV and choose from valid event types.

Step 9. Press the **Save** key to save the information. The record is saved and the system automatically attempts to load it into the system.

Step 10. Press the **Next Record** key to open the next record with an error.

Step 11. Repeat the process until all records are successfully loaded.

# REPORTS

Sunflower Enterprise Components offers several reports that are flexible enough to cover a variety of reporting needs. Through a wide choice of input parameters, users may customize the reports to make them as detailed or as generic as users need. The following reports are available out of the box:

## IT COMPONENT TYPES REPORT

Without any search criteria being specified, the IT Component Types Report will list all IT Component Types that are defined in the system in alphabetical order. By default, only component types are listed without any attribute names. Users may choose to display also the names of all attributes that are defined for each of the listed component types.

The following options allows users customize the report:

Specifying a certain component group, even under utilization of wildcards, will show users all component types that have been associated with the returned component group(s). If there is no user identification provided with the search criterion, the report will apply the entered search criterion only to the field of default component groups.

If users enter a certain component type, the report will list all the component groups with which this component type has been associated with. Again, if there is no user identification provided with the search criterion, the report will apply the entered search criterion only to the field of default component groups. Only if users have entered the information of a unique user, the personal component groups of that user will also be considered in the report.

Filling out the user information without specifying any of the search criteria described above will list all component types defined in the system, grouped by component group. In this case, users will see all default and all personal groups, as defined by the specified user, with all their associated component types. Any component types that have not been associated with any component groups will be listed on the bottom of the report.

## CATALOG IT COMPONENTS INFORMATION REPORT

The Sunflower administrator may have set up one or more sets of selected components as pre-defined component configurations for certain catalog items. A specific catalog item can have multiple configurations. Each configuration may comprise any number of components. For each component within a configuration, default values may have been defined for its attributes.

This report lists the IT Components of all configurations that have been defined for the selected catalog item(s). By default, only the components of a configuration are listed, without any attribute settings. But users may choose to display also the attribute values that have been defined for each component of a configuration. Rather than listing all configurations for a certain catalog item, users may restrict the output to print only the components of a particular configuration of the selected catalog item(s).

Users may also start the search off with a certain configuration users are interested in or even search for configurations of catalog items by specifying the component type(s) and attribute setting(s) users are looking for.

## ASSET IT COMPONENTS GLOBAL SEARCH REPORT

This report lists the results of a search, where users may specify how to select the assets that should appear on the report and how much detailed asset and/or component information is to be printed for each asset.

Besides the asset search criteria that are also provided by other Global Search reports, such as Manager, Custodian, Steward, Custodian, Location and so on, this report offers to search for assets by component information. Users may choose to search by a certain Default Component Group, by a certain Component Type or even by specific Attribute Values. Any combination of search criteria is possible.

By default, the report list the assets returned by the search with their main information, such as asset interest type and identifier, catalog information and asset value. Optional, users may also choose to include asset details (i.e., Steward, Custodian, User and Location) or contents of the asset global User Fields.

Another option is to include component information for each of the returned assets. This will result in a listing of all components and their attribute settings for each asset. If users, however, don't want to see any information about the assets returned by the search at all and are only interested in the total number of assets that fulfill the search criteria, then users may limit the report's output to the total counts of the assets returned and of their values.

# ASSET IT COMPONENTS HISTORY REPORT

For each component of an asset, the system keeps track of its change history within the specific asset. The change history will automatically be started by assigning a component to an asset (no matter, if through a manual process or through copying). From then on, each change, such as updating a components' attributes or tracking identifier or transferring the component to another asset, will create a new record in the change history of the component. The final removal of a component from an asset does not create a new change record, but closes the change history of the component by ending the most recent change record written for that component.

This report provides an overview of all changes that have been made to components of a selected asset over the asset's entire life time.

For the selected asset, the report list the change history for each component that ever has been assigned to the asset. Per component, the report lists installation and, if existing, removal information. The change records per component are listed in descending order by their effective date. By default, only effective date, identifier of the component, creation information and attribute settings are listed per change record. However, users may choose to list also the event information for each change record (i.e., reason for creating the change record and contents of any user fields for that event).

# ASSET IT COMPONENTS INTERFACE PROCESSING RESULTS REPORT

This report lists the results of a mass load of asset IT components records through the Asset IT Components interface. For each interface record that has been associated with the selected load group, the following information is provided: The record group, date and time stamp of the actual loading attempt and the result, whether the loading process was successful or not. A summary at the end of the report provides an overview of total counts: First for records that failed to load and second for the totality of records in the load group.