Welcome to Sunflower Report Training!

The following training is designed to enable you to generate reports for your department’s capital assets in the Sunflower Assets system. It is suggested that you print this training manual and then perform the easy to follow instructions below.

Purpose of Report Training

The purpose of this training is to familiarize you with the numerous Sunflower reports which have been developed to assist you in managing your organization’s capital equipment assets. This training will also demonstrate how to generate these reports.

Sunflower Reports

There are two categories of Sunflower reports that will be useful to you - financial reports and inventory reports. A list of these reports appears below. A description of each report, along with the field names contained in the report, and a print screen indicating the relevant parameters is at the end of this training.

- Accountable Equipment Officer Review
- Asset Event Type Report
- Asset Recap Sheet
- Capital Equipment Events by Org
- Capital Equipment Snapshot by Org
- Cost Component Record Search Report
- Inventory Cost by Org
- Inventory Report by Org
- Service Center Projected Depreciation Report

Other reports are available; however, these are specialized reports and will generally not be helpful to you. Please contact Equipment Accounting if you have any questions.
How to Create a Report

This component of the training will demonstrate how to create a report. First, you will need to login to Oracle.

Click on the Adminsystems link on the UAB Main web page.

From the Admin Systems screen, click on the Oracle HR & Finance link on the left of the page.
Now, click on the highlighted “here” link on the Oracle HR and Financial Applications screen.

The Oracle Administrative System login screen will appear.
Type your Blazer ID and password in the appropriate fields. Then, click the I Agree button or press Enter.

This is your Oracle navigation screen. Notice the link titled UAB FN Document Entry/Approval. If you have this responsibility, you have automatically been given the UAB Sunflower Custom Reports responsibility. Click on UAB Sunflower Custom Reports.

* Note: If you do not have FN Document Entry/Approval access, then contact AskIT at 6-5555 to inquire how to get this responsibility or talk to your department administrator.
You must wait for this screen to load.

In the UAB Sunflower Custom Reports form, notice that Processes and Reports are highlighted.

Click on the Open button if the Find Requests window does not automatically appear.
The Find Requests window appears. This window enables you to do several things related to reports. The default selection is All My Requests. Click on the Submit a New Request button.

The Submit a New Request window appears. Single Request is the default option. Click the OK button.
The Submit Request window appears. This window enables you to select a specific report to run. **Click** on the ellipsis in the Name field.

A LOV listing all the available custom reports appears. **Select** the report that you want to run, and then **click** the OK button.

**Note:** In the report training, all participants will create a Capital Equipment Snapshot by Organization report.
The Parameter submission screen appears which will enable you to input the specific parameters for the selected report.

Click into the first parameter field to input the specific detail required to run the report you have selected. Notice that an ellipsis appears in the field. Most parameter fields have been given an ellipsis to simplify the parameter selection process and ensure the data integrity of the report.

Select the appropriate accounting period from the LOV, then click OK.

Note: Sunflower was implemented effective January 1, 2006. There are no accounting periods available prior to this date.
Click into the next field and another ellipsis will appear. The Manager field is always a choice between HOSPITAL and UNIVERSITY. Make your selection and then, click the OK button.

Click into the Steward Org field and another ellipsis will appear. Click on the ellipsis in the field and select the specific org for this report. Then, click the OK button.
Notice that there are two Steward Org parameter fields available. These fields enable you to select a range of Steward Orgs for the report. You are also able to select the same Steward Org and only information about that one Steward Org will appear in the report.

**Note:** Most reports allow you to retrieve data for a range of Steward Orgs.

Select the same Steward Org or another Steward Org, and **click OK**.
Click into the next field, click on the ellipsis and select the appropriate status of assets. Then, click OK.

In the Output field, click on the ellipsis and select the format in which you would like to see the data. You can select a PDF format or an EXCEL spreadsheet of the data, or ALL which means both formats. Then click OK.
This is the completed parameter window for your review. Now, click on the OK button.

The Submit Request window opens portraying the report parameters that you previously chose. Click on the Submit button to request the report.
This is the Request window indicating the status of your report requests. Your latest request appears at the top of the list. Notice at the top of the Phase column your report is “Pending.” Click on the Refresh Data button to update the Phase indication.

After repeated clicking, the Phase column may indicate “Running.” Continue clicking on the Refresh Data button.

Note: When the output format of “ALL” is selected, the PDF will be indicated as SFUAB Report which will be listed above the EXCEL format indicated as SFUAB Program.
As soon as “Completed” appears in the Phase column, then you are ready to review the report. 
**Click** on the View Output button to see the report.

Note: You can provide the Request ID to someone else to review the report.

Here is the PDF view of the report. Notice that the report displays the data according to the requested parameters. Notice also that there are four pages to this report.

The report may also be sent to the printer at this time.
Here are the other pages of the report. Notice the individual column header titles and the footer which may often provide a sub total of specific values, in this example, by specific Steward Orgs.

On the final page of the report, you can see the sub total for a Steward Org and the Report Total which would include the range of selected Steward Orgs from the parameters.

To return to the Request screen or to generate a new report request, simply click on the Close button in the upper right corner of the screen.
When you return to the Request screen, select the second report request labeled “Program.” This will be the Excel report. Click on the View Output button to view it.

The initial output will appear in a “code” format.
Click on Tools in the Menu and select Copy File.

The Viewer Option window will appear. Click on Ok.
You will be presented with the options to Open or Save the file. **Click** on Open to view the data. You may choose to save the Excel spreadsheet later.

**Note:** If you want to manipulate the data (rearrange columns, create totals, etc.) in the Excel format, you must save the file first.

The data will appear in a spreadsheet format. However, this is not Excel. Evaluate the data carefully to determine if it represents what you have requested.
If you choose to save the data in an Excel spreadsheet format, then select Save As from File in the Menu.

In the Save As window, select the folder or drive where you want the spreadsheet to reside, and then name the spreadsheet. In the Save As Type field, click on the drop-down arrow and select Microsoft Excel Workbook.xls. Click the Save button to save the spreadsheet in Excel.
If you want to request an additional report, close all windows (Excel and Report: Request ID). When you return to the Requests screen, click on the Submit a New Request button.

The Submit a New Request window will appear. Click OK to submit a new Sunflower report request.
Available Reports and Descriptions:

Accountable Equipment Officer Review - This report provides a current listing of Accountable Equipment Officers (AEOs) by organizational units. The report does not include history records of AEOs. The fields of data in this report include: Name of the AEO, Steward Org, AEO Begin Date, and AEO End Date. View parameters below:

![Accountable Equipment Officer Review Parameters](image1)

Asset Event Report - This report provides a listing of capital equipment based on a specified Asset Event such as Initial, Ongoing, and Final. The fields of data for an asset include: Asset ID, Asset Description, Asset Event, Event Date, Acquisition Date, Write-Off Date, Deferred Depreciation Start Date, Tag Location, Service Center Account, and Total Cost. The parameters for this report are: Begin Date, End Date, Event Type (INITIAL, ONGOING, or FINAL), and Report Type (PDF, EXCEL or ALL). View parameters below:

![Asset Event Report Parameters](image2)

Asset Recap Sheet - This report provides users with a recap of selected financial information about a specific asset and its funding. The fields of data for an asset include: Asset ID, Asset Description, Asset Type Category, Activity Status, Final Event, Final Event Date, Accountable Equipment Officer, Steward Org, Acquisition Date, Last Inventory Date, Last Inventory By, Building, Room #, Manufacturer, Model, Serial #, Model Yr, License #, Capital/Memo, Total Cost, Accumulated Depreciation, Net Book Value, Service Life, Remaining Depreciable Life, and Cost information. The parameters for this report are: Asset #. View parameters below:

![Asset Recap Sheet Parameters](image3)
Sunflower Training (Step-By-Step)

**Capital Equipment Events by Org** - This report provides users with a listing of capital equipment by event, over a specified range of accounting periods, by the Steward Organization. The fields of data in this report include: Asset Identifier, Asset Description, Asset Event, Event Date, Acquisition Date, and Total Asset Value. The parameters for this report are: Accounting Periods (From and To), Event Type, Manager Org (HOSPITAL or UNIVERSITY), Steward Names (From and To), and Output (PDF or EXCEL). View parameters below:

![Parameters](image)

**Capital Equipment Snapshot by Org** - This report provides users with a listing of capital equipment, as of a specific accounting period, by the Steward Organization. The fields of data in this report include: Asset Identifier, Asset Description, Acquisition Date, Final Event Date, Total Cost, Accumulated Depreciation, and Net Value. The parameters for this report are: Accounting Period, Manager Org (HOSPITAL or UNIVERSITY), Steward Orgs (From and To), Status (ACTIVE, INACTIVE, ALL) and Output (PDF or EXCEL). View parameters below:

![Parameters](image)
Cost Component Record Search Report - This report will enable users to search for assets with only limited information. The search will be based on UDFs (user-defined fields) that contain payment information about the asset. The fields of data in this report include: Asset Identifier, Description, Acquisition Date, Asset Activity Status, Steward Org, Funding Account, PO Requisition Number, PO Number, Invoice Number, Check/Wire Number, Check/Wire Date, Vendor/Lender, Cost Line Amount, and Total Cost. View parameters below:

Note: Data for all of the parameters is not required. The report may be run with data for only one parameter.

Inventory Cost Report by Funding Org - This report provides a department with the means to determine the capital equipment cost funded by org or account. The fields of data in this report include: Asset Identifier, Asset Description, Resolution, Capital/Memo, Acquisition Date, Affiliation Org, Manufacturer, Model, Serial #, Cost Line Amount, and Total Cost. The parameters for this report are: As of Date, Manager Org (HOSPITAL or UNIVERSITY), Beginning Steward Org range, End Steward Org range, Purchase Account (a wild card “%” feature is provided in case the full Purchase Account number isn’t known), and Selected Report Type (PDF or EXCEL). View parameters below: 
Inventory Report by Org - This report provides users with a listing of capital equipment assets found or not found during a Review Campaign, by Steward Org. The fields of data in this report include: Asset Identifier, Asset Description, Grant Status, Activity Status, Last Inventory Date, Capital/Memo, Manufacturer, Model, Serial #, Total Cost. The parameters for this report are: Output Type Output (ALL, PDF or EXCEL), Fiscal Year (Date of Inventory Campaign), Org Name, Equipment in Inventory Choice (ALL, FOUND, NOT FOUND). View parameters below:

Service Center Projected Depreciation Report – This report provides users with a listing of capital equipment assets and projected depreciation amounts by Service Center account. The report gives the Projected Current Fiscal Year and Projected Next Fiscal Year depreciation expense. It will be used primarily by Service Centers in determining their rates. The fields of data in this report include: Asset Identifier, Asset Description, Acquisition Date, Activity Status, Building, Room Number, Depreciation Life, Remaining Depreciation Life, NonFederal Dollars, NonFederal Accumulated Depreciation, NonFederal Net Book Value, Projected Depreciation Expense (Current FY), Projected Depreciation Expense (Next FY). View parameters below: