🌻 ASSET MAPPING

T*he Asset Mapping* functionality within Sunflower Assets allows organizations to upload visual representations of locations, such as maps, architectural designs, floor plans, and associate them with Sunflower locations. Once maps have been configured, users can then view assets via these maps.

One key feature of Sunflower's Asset Mapping functionality is the ability for users of Sunflower to view assets on maps. Users may search maps in multiple ways: by location; by a single asset; or by multiple asset search criteria. In addition, users may view the most recent location of the asset on a map directly from Summary and History pages.

KEY CONCEPTS

This chapter includes the following discussion points and concepts:

- Search Maps
    - *Form Overview*
    - *Key Functions*
    - *By Asset*
    - *By Multiple Assets*
    - *By Location*
- Viewing Maps from Summary and History
- Printing Maps

ASSET MAPPING ROLES

The section addresses the different roles related to asset mapping, which roles are applicable for each type of user, and the access and limitations of each role.

The five roles related to Asset Mapping are:

- Map Administrator
- Map Deletion
- Map Population
- Map Upload and Tag
- Other Sunflower Roles

ROLE DIFFERENCES

The table below describes the different levels of access and functional capabilities associated with the asset mapping roles: Map Administrator, Map Deletion, Map Population, Map Upload and Tag, and Regular User. The Map Administrator role has access to and can manipulate (create, update, or delete) all maps. The Map Deletion role has access to delete maps only. The Map Population role can populate and update maps, but is unable to create or delete maps. The Map Upload and Tag role is able to upload maps and tag assets to a map, but is unable to delete a map. Finally, the other Sunflower Roles that do not have administrator functions, but has access to view maps and the ability to view assets on a map.

ASSET MAPPING MENU ACCESS

Menu Items	Map Administrator	Map Deletion	Map Population	Map Upload & Tag	Regular User
Manage Map	Yes	Yes	Yes	Yes	No

TASKS FOR ASSET MAPPING ADMINISTRATION ROLES AND FUNCTIONAL USERS

TASKS FOR ADMINISTRATOR ROLE

The following tasks are performed by the Map Administrator Role:

- Upload a Map
- Importing Assets to a Map
- Updating a Map
- Deleting a Map

TASKS FOR DELETION ROLE

The following tasks are performed by the Map Deletion Role:

- Deleting a Map

TASKS FOR POPULATION ROLE

The following tasks are performed by the Map Population Role:

- Importing Assets to a Map

TASKS FOR MAP UPLOAD AND TAG ROLE

The following tasks are performed by the Map Upload and Tag Role:

- Upload Maps
- Tag Maps
- Update Maps

TASKS FOR SUNFLOWER USERS

The following tasks are performed by Sunflower Users:

- Searching Maps
- Viewing Maps from Summary and History
- Printing Maps

SEARCHING MAPS

This Asset Mapping user guide addresses the process of searching maps. Maps can be searched by a single asset, by multiple assets, or by location. This chapter discusses the following transactions:

- Search Maps
- Viewing Maps from Summary and History
- Printing Maps

SEARCH MAPS

The Search Map function is accessible by any end user in Sunflower Assets who has access to see standard asset data in the system. When a user searches for assets on a map, the same security which dictates the assets and is available to any user in Sunflower Assets also applies to the search results shown on a map. When a location is changed in Sunflower Assets, it is automatically updated the next time the asset appears in search results on a map.

OVERVIEW

Sunflower Asset Mapping functionality includes three ways to search: by asset; by multiple assets; or by location. Searching Maps is available in Management, Agreements, Finance, Inactive, and Excess modules.

> NOTE: When Searching Maps, they are accessed and labeled as "Search Map" from the Mgmt Menu. However, the form itself will display as "Query Maps". These two labels represent the same form. The terms "Search Map" and "Query Maps" are used according to how they will be displayed throughout this section of the user guide.

<u>**IMPORTANT NOTE**</u>:

When working within the Asset Mapping browser windows, **DO NOT USE** the back and forward buttons of the browser window (examples: Internet Explorer or Mozilla Firefox). Only use the buttons within the Asset Mapping module itself. Using the browser navigation buttons may result in errors that will require closing the existing window and reopen from Sunflower forms.

FORM OVERVIEW

The Query Maps form is structured as follows:

1. Search Type Tabs

2. Search Criteria Block

3. Results Block

KEY FUNCTIONS

The key functions of the Query Maps form are as follows:

MAGNIFYING GLASS BASIC SEARCH

Users have the option of clicking on the magnifying glass icon next to a field to simplify data entry. This allows the user to enter the first part of the specific field description and click the **Search** button to display valid results for that field.
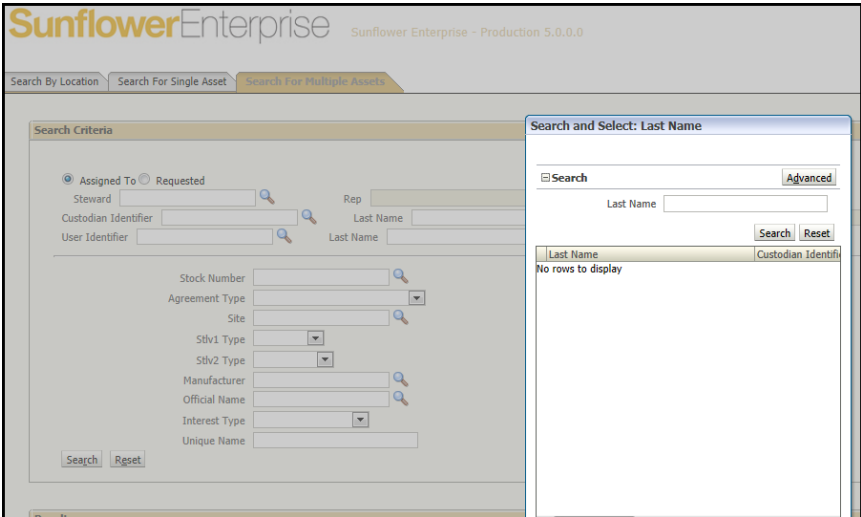
MAGNIFYING GLASS ADVANCED SEARCH

Users have the option of clicking on the magnifying glass icon next to a field to simplify data entry. The search process can be further simplified by clicking on the **Advanced** button. This allows the user to search for a specific field description using multiple criteria and click the **Search** button to display valid results for that field.
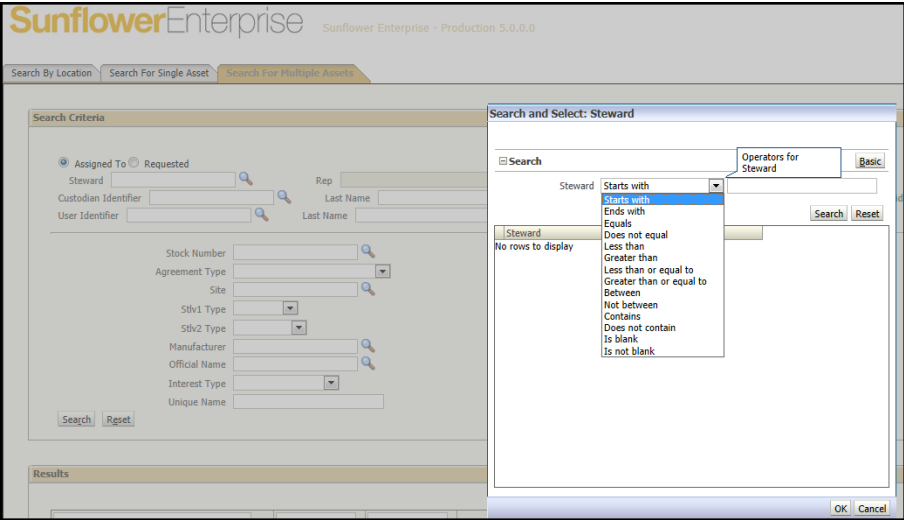
FILTER RESULTS LIST FUNCTION

Once the results of a search have been displayed, multiple results can be filtered by Map Description, Site or number of Assets to simplify the process of selecting the appropriate map. This feature also allows the user the ability to view either the map or the assets associated with the selected map.

SEARCH BY ASSET

End users may search for assets directly from the menu of the module being utilized in Sunflower Assets. In the example below, we will use the Management module.

To search by an asset:
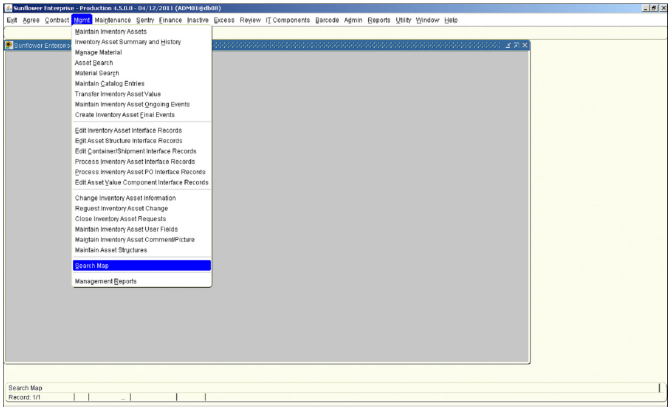
Step 1. Log in to Sunflower and launch Sunflower Forms.

Step 2. From the Mgmt menu, select Search Map.

NOTE: This selection is available in the Mgmt, Agree, Finance, Inactive, and Excess modules.

Result: The Query Maps screen is launched in a separate browser window.

Step 3. Select the Search For Single Asset tab.
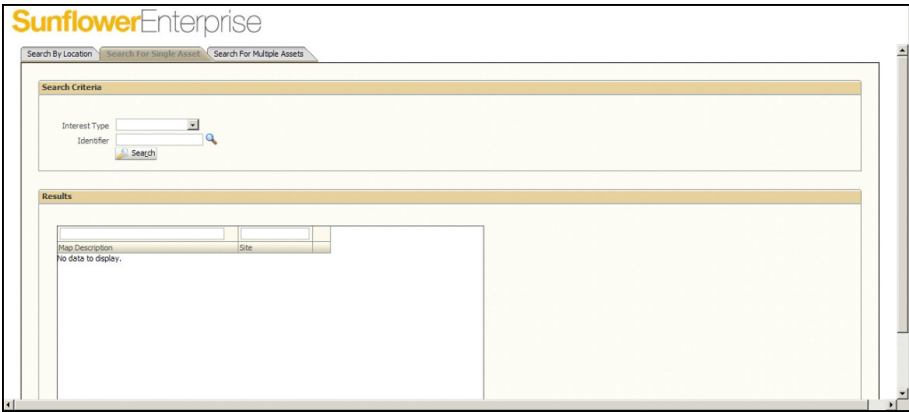
Step 4. Select the interest type of the asset from the Interest Type drop-down.

Step 5. In the Identifier field, enter the identifier of the asset.

NOTE: The identifier may be entered manually or selected by searching using the magnifying glass.

Step 6. Click the Search button.
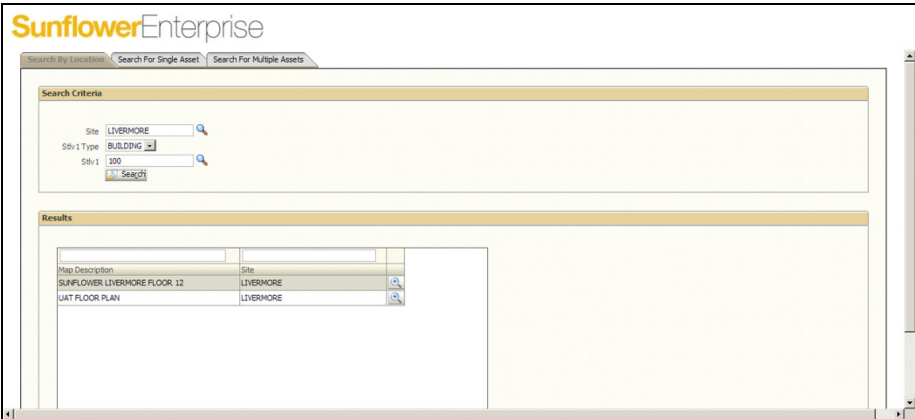
Result: The search results are listed in the Results section.

Note: Filter the results by entering search criteria in the text box at the top of each column and pressing Enter.

Step 7. Click the magnifying glass to the right of the map to be viewed.
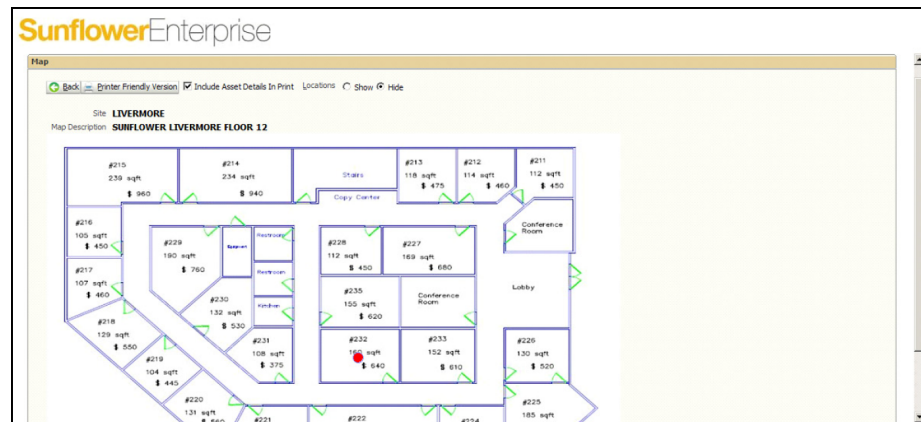
Result: The map is displayed.

NOTES:

- To view the location boundaries, select the radio button **Show Location.**
- Place cursor over single dots to view asset information.

SEARCH BY MULTIPLE ASSETS

Users may search for a group of assets based upon the standard asset search criteria available in many Sunflower forms. One or multiple maps may result from the search with multiple assets displayed on the map.

To search for multiple assets:
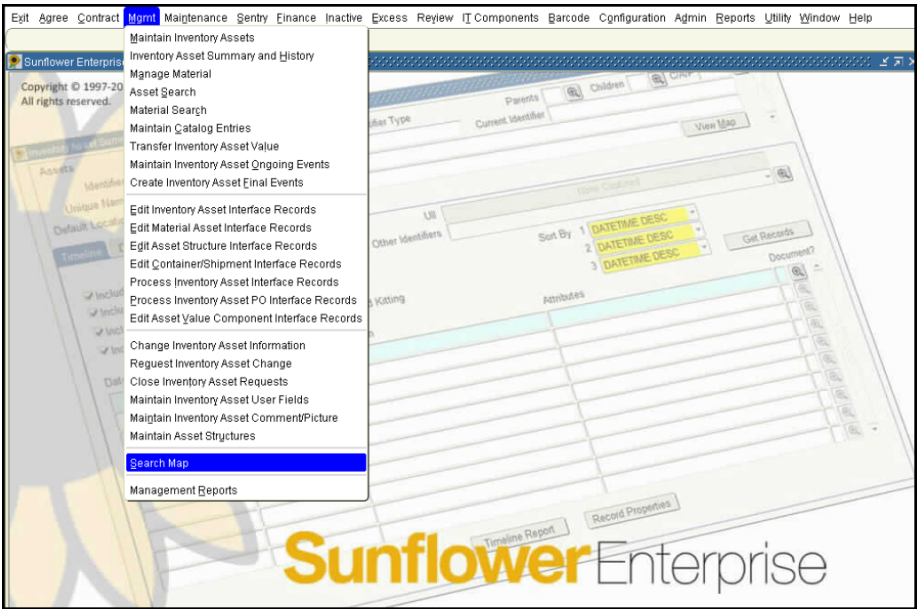
Step 1. Log in to Sunflower and launch Sunflower Forms.

Step 2. Select Search Map from the Mgmt menu.

NOTE: This selection is available in the Mgmt, Agree, Finance, Inactive, and Excess modules.

Result: The Query Maps screen is launched in a browser window.

Step 3. Click the Search For Multiple Assets tab.

Step 4. Enter the desired search criteria.

NOTE: Some fields may be manually entered or populated by searching with the magnifying glass. Other fields may be populated by selecting a value from the drop-down menu.


Step 5. Click the Search button.

Result: The search results are listed in the Results section along with the number of assets on the map.

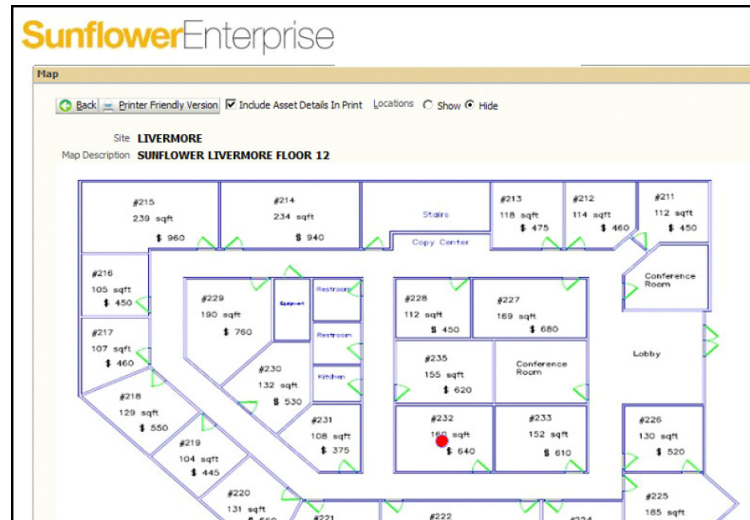NOTE: Filter the results by entering search criteria in the text box at the top of each column and pressing Enter.
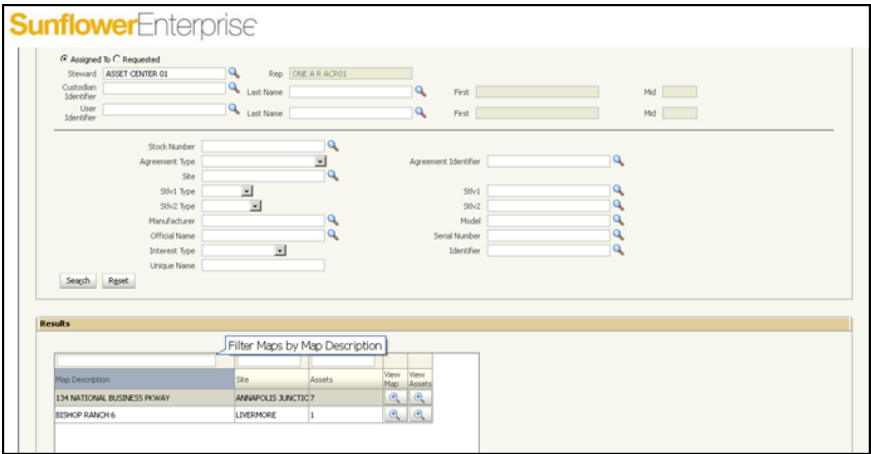
NOTE: From the Search Results screen, click the **View Assets** magnifying glass to the right of the map to view assets associated with that map.
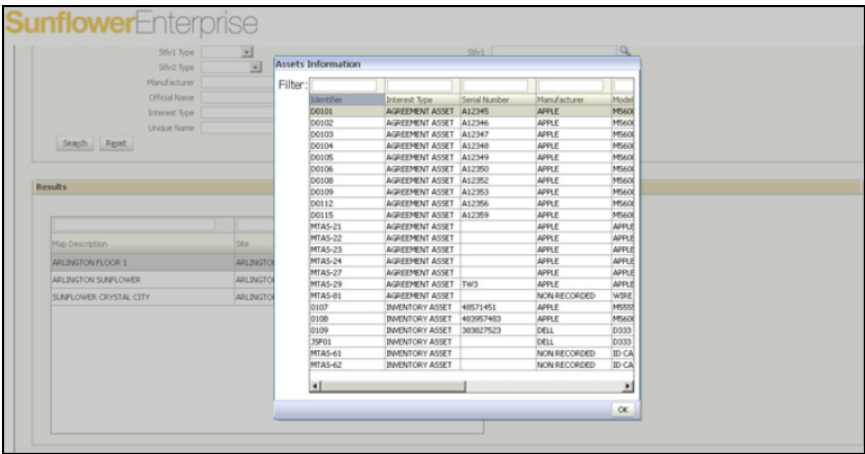
Step 6. Click the **View Map** magnifying glass to the right of the map to be viewed.

Result: The map is displayed.

NOTE:

- To view the location boundaries, select the radio button **Show Location.**

- Place cursor over single dots to view asset information.

- When multiple assets are located in a single location, the number of assets are displayed. Click on the number to view the asset list in that location.

SEARCH BY LOCATION

End users may also search for assets by location. This method of searching can be extremely useful while performing a physical inventory.
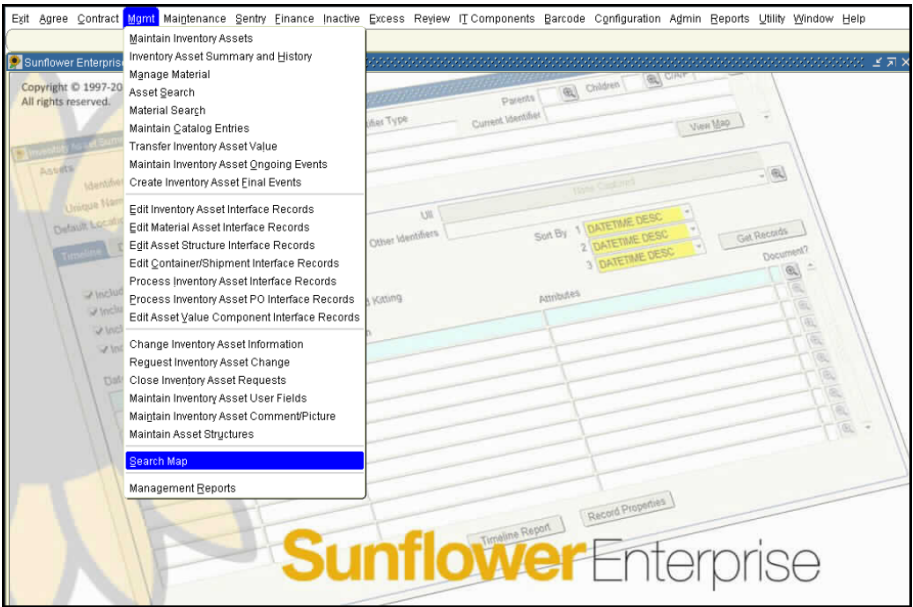
Step 1. Log in to Sunflower and launch **Sunflower Forms**.

Step 2. Select **Search Map** from the **Mgmt** menu.

NOTE: This selection is available in the Mgmt, Agree, Finance, Inactive, and Excess modules.

Result: The Query Maps screen is launched in a browser window.

Step 3. On the **Search By Location** tab, enter a site for the location to search.

NOTE: The site may be entered manually or selected by searching using the magnifying glass.

Step 4. If desired, select a **Site Level 1 Type** from the drop-down. Then enter a **Structure Level 1** value on which to be searched.

NOTE: The Structure Level 1 may be entered manually or selected by searching using the magnifying glass.

Step 5. Click the **Search** button.

Result: The search results are listed in the Results section. **Note**: Filter the results by entering search criteria in the text box at the top of each column and pressing Enter.
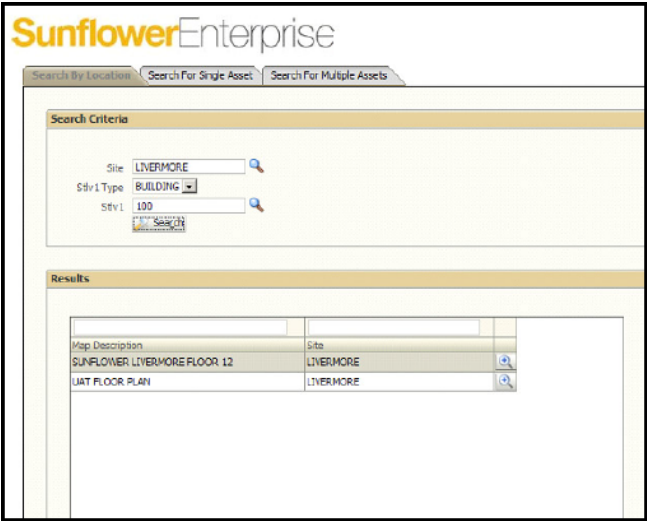
Step 6. Click the magnifying glass to the right of the map to be viewed.
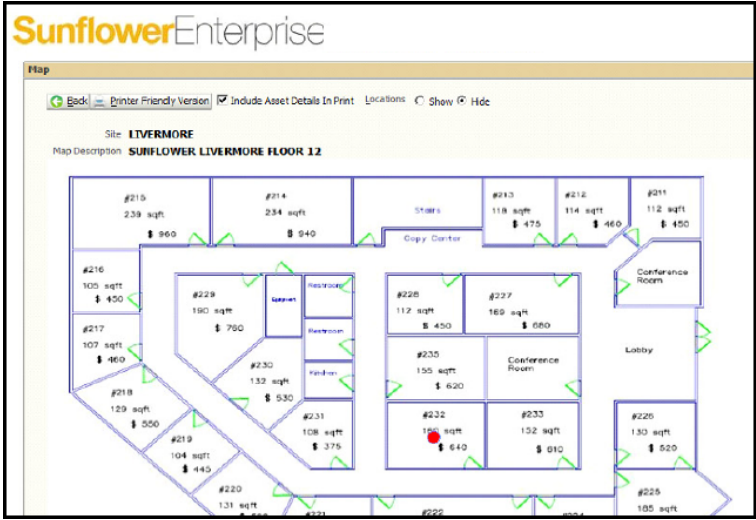
Result: The map is displayed.

NOTE:

- To view the location boundaries, select the radio button **Show Location.**

- Place cursor over single dots to view asset information.

- When multiple assets are located in a single location, the number of assets are displayed. Click on the number to view the asset list in that location.
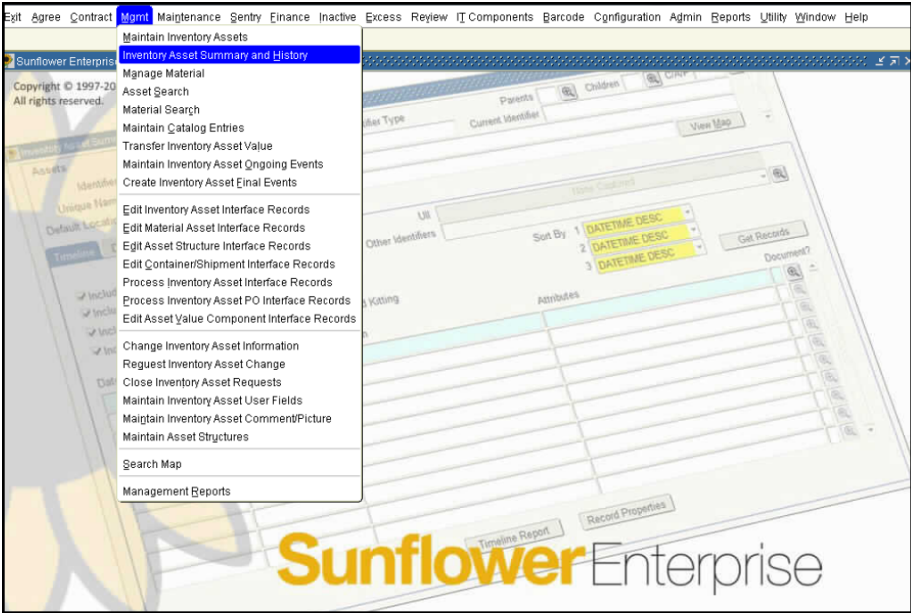
VIEWING MAPS FROM SUMMARY AND HISTORY

When users query assets via the Summary and History screen, the most current location of that asset may be viewed on maps.

To view the map of an asset from the summary and history page:

Step 1. Log in to Sunflower and launch **Sunflower Forms**.

Step 2. From the **Mgmt** menu select **Asset Summary and History**.

NOTE: This selection is available in the Mgmt, Agree, Finance, Inactive, and Excess modules.

Step 3. In the **Identifier** field, enter the identifier of the asset to be searched and press the **Tab** key.

Result: The asset's history is displayed.

Step 4. Click the **View Map** button.

NOTE: This button is located near the top right side of the screen to the right of the Default Location field. If the asset is not in a location that has a map associated to it, the button will not be enabled.

Result: The Query Maps screen is launched in a separate Internet browser window with the previously entered identifier already populated

Step 5. Click the **Search** button.

Result: The search results are listed in the Results section. **Note**: Filter the results by entering search criteria in the text box at the top of each column and pressing Enter.

Step 6. Click the magnifying glass to the right of the map to be viewed.

Result: The map is displayed.

NOTE: The Show and Hide locations radio buttons show and hide the previously created areas on the map.

PRINTING MAPS

Once displayed, users can choose to print a map and its asset details.

To print a map:

Step 1. Log in to Sunflower and launch **Sunflower Forms**.

Step 2. Using any of the four methods outlined in previous sections (Querying by Location, Querying by Single Asset, Querying by Multiple Assets, or Viewing Map from Summary and History), search for an asset or multiple assets.

Result: The search results are listed in the **Results** section.

Step 3. Click the magnifying glass to the right of the map to be viewed.

Result: The map is displayed.

NOTE: The Show and Hide locations radio buttons show and hide the previously created areas on the map.
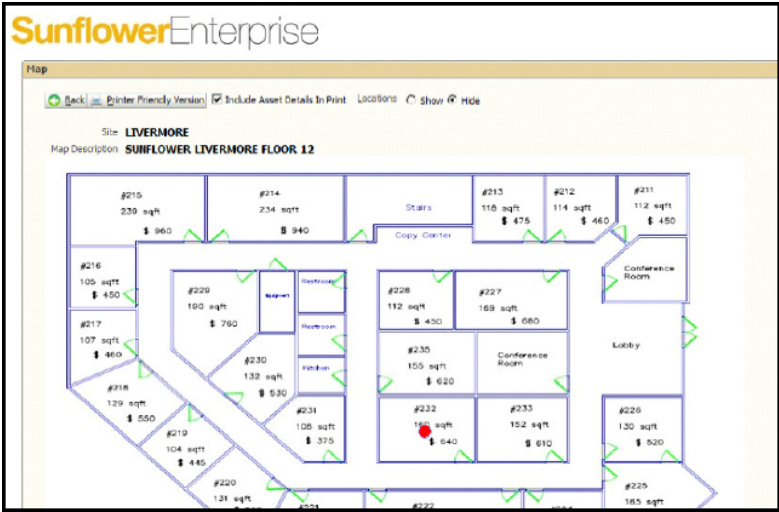
Step 4. In order to display the asset details on the map, ensure the **Include Asset Details in Print** checkbox is enabled. If no asset details are required, disable the checkbox.

Step 5. Click the **Printer Friendly Version** button.

Result: The map and key are displayed in a printer friendly format. **Note**: The map contains keys which correspond to the table listed below the map containing asset details.

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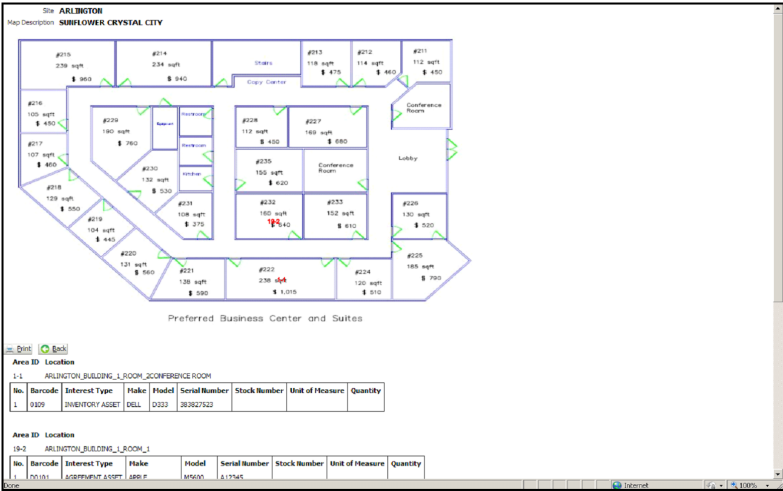
Step 6. Click the **Print** button. Finish printing by using the system's print dialog boxes.