

Peregrine

AssetCenter

Catalog



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AssetCenter

Peregrine Systems, Inc.
Worldwide Corporate Campus and Executive Briefing Center
3611 Valley Centre Drive San Diego, CA 92130
Tel 800.638.5231 or 858.481.5000
Fax 858.481.1751
www.peregrine.com



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1 Introduction (Catalog)

CHAPTER

Who is the Catalog module for?

The catalog module of AssetCenter version 4.0 is intended for everyone involved in each step of the catalog-using chain. This includes both ends of the spectrum: vendor and buyer.

In AssetCenter:

- Managing a catalog implies only the management of its products and their associated references.
- Managing procurements implies purchasing catalog references.
- Managing a company's portfolio means receiving references and transforming them into items in the portfolio.

Catalogs can be defined according to how they are intended to be used:

- My company sells products and produces a catalog in which they are referenced.

The catalog administrator distributes the catalogs to purchasers, product managers and marketing managers.

- My company buys products from suppliers.
The catalog administrator distributes the catalogs to purchasers, those in charge of receiving goods, infrastructure managers, and IT maintenance managers, as well as all those making purchase requests in AssetCenter.
The procurement manager manages the catalogs, and deals with suppliers.
Once you have defined how you will use the catalog, you need to then determine its management parameters:
- The structure of a catalog is managed by the administrator. The structure enables, for example, the creation of standard configurations.
- The tool enabling catalog-reference research and consultation is mainly used by those employees having access to this functionality, as well as by the purchase manager.

What does the Catalog module do?

The catalog module, in relation with the Procurement module, facilitates acquisitions linked to the following systems of management:

- Management of the IT portfolio.
- Management of raw materials, bulk goods, office supplies and furniture.
- Management of Maintenance, Repair and Operations (MRO).
- Service management: contracts, work orders, projects, etc.
- Management of your main assets.

Contents of the Catalog Guide

This reference guide is divided into several distinct chapters:

- General concepts (Catalog)

This chapter deals with this module's intended audience, key concepts and the typical cases that apply to this module.

- Creating a catalog (example scenario)

This chapter contains a sample scenario, outlining the different steps necessary to create a catalog.

- Interface layout

This chapter lists and explains the different screens involved in the catalog module.

- Glossary (Catalog)

The glossary lists and defines the key terms used in the catalog module.

- References (Catalog)

This chapter contains exhaustive and systematic reference data.

You should read this chapter if you want information about all the components of the AssetCenter application linked to the AssetCenter module or if you want access to advanced or additional data.

2 | General concepts (Catalog)

CHAPTER

AssetCenter's catalog module was developed to facilitate procurement management. This module relies on the individualized management of products, catalogs and catalog references.

In AssetCenter, the management of your catalogs enables you to:

- Centralize your purchases.
- Track your suppliers and catalog references.
- Standardize product selections for purchase.

Appearance of the catalog

In AssetCenter, a catalog is organized and represented hierarchically. This hierarchical organization varies according to how you want to structure your catalog: Products can be classified by category, by brand, by price range, etc. The demonstration database provided with AssetCenter 4.0, for example, organizes the catalog by product family.

Each product then corresponds to one or more catalog references, which are independent of your catalog organization.

 **Note:**

With AssetCenter, you can use the UN/SPSC international standard to create your product catalogs and their hierarchical organizations.

At the beginning of your acquisition cycle, the catalog will differ from what is really in your portfolio. As you receive the items you order from catalog references, you will start creating new models in AssetCenter. These new models allow the catalog to reflect what is actually in your portfolio. Furthermore, you should make a difference between an internal catalog - which relies on the models in your portfolio - and an external catalog that uses, for example, the UN/SPSC standard.

Models

Models enable you to define the manner in which an item will be created in relation with a product in AssetCenter.

Catalog products

A product is an object that only exists in a catalog. It does not correspond directly to any items in your portfolio.

The products in your catalogs generally correspond to the models that your employees can request for purchase. If a product that you want to buy does not exist among the models in your company, AssetCenter enables you to create it automatically. For more information on models, see the **Portfolio** guide, chapter **Portfolio**, section **Models**.

When you receive a product, a portfolio item is created, and it relies on a model to do so. When a product's purchase request is based on a model, this model is used to transform your product into a portfolio item.

In AssetCenter, several models are available:

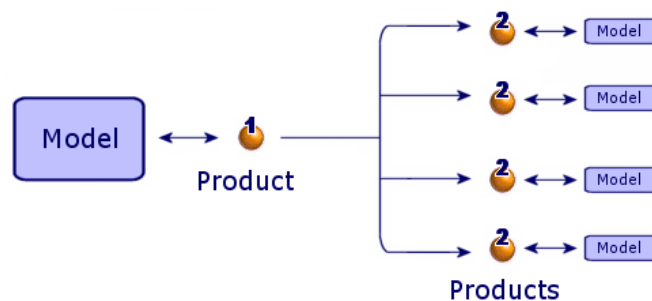
- Consumables
- Assets
- Cables
- Contracts
- Training sessions
- Work orders

Supplier package (bundle)

A supplier package (bundle) corresponds to a set of products that the supplier can provide you as a standard package.

In order to facilitate the simultaneous creation of several records in the database, AssetCenter lets you create a bundle of products.

Figure 2.1. Supplier package (bundle)



A supplier package links one or more products (2) to a parent product (1). This product relies on a model, as do all of its component products.

Example: In a Compaq package, the CPU is the parent product whose components are a keyboard, a mouse and a screen.

When you acquire this product via the procurement cycle, the CPU asset is created with the mouse, keyboard and screen.

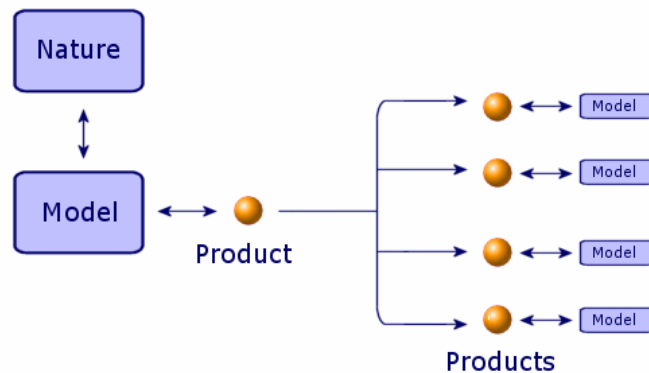
Quantities and supplier packages

You might find yourself in a situation where you need to create a supplier package composed of a non-uniform quantity of items.

For example, you decide to order three computers with which are associated four printers.

In this case, you need to create a product called "Bundle", for example, whose composition is three computers and four printers, and whose model's nature creates nothing.

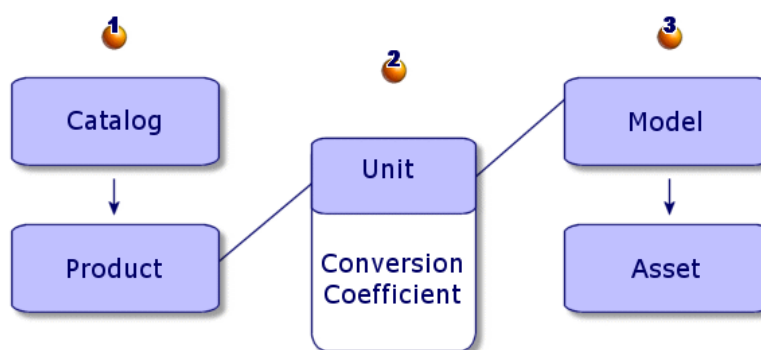
Figure 2.2. Quantities in a supplier package



Reconciling measurement units between a product and its model

In AssetCenter, you can manage a portfolio item in one measurement unit and order items in another.

Figure 2.3. Units



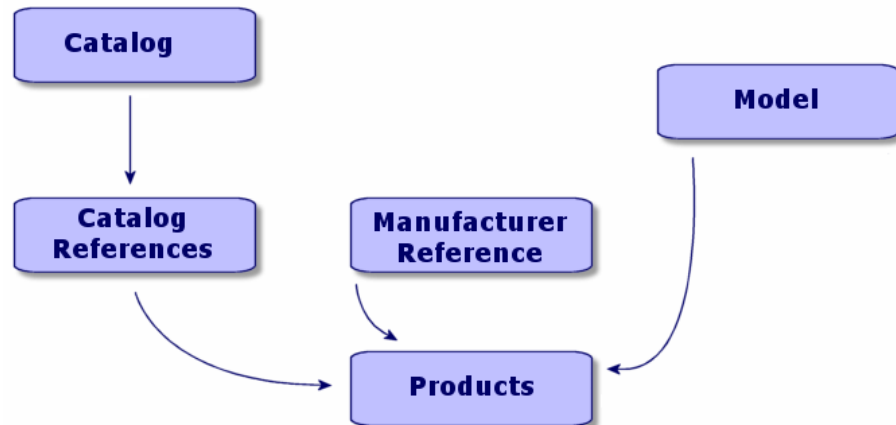
The management of measurement units is done at the product level (1) and the model level (3) of your portfolio. The reconciliation between these two units is done using a conversion coefficient (2).

Refer to chapter *Creating a catalog (example scenario)*, section *Creating a product*, sub-section *Managing a product's measurement unit*, as well as the **Portfolio** guide, chapter **Portfolio items**, section **Models**, sub-section **Units used in batches** chapter, for more details about this function.

Catalog references

A catalog reference ties a product to a catalog. Furthermore, a product can be tied to one or more catalogs. This association includes the creation of a reference and the assignment of a price. You will have as many catalog references as you have associations of products to catalogs. For example, the IntelliMouse product is associated with the VPC Direct catalog and has the reference VPC020125540. Its price is 5 dollars.

This graphic illustrates the logical link between a product, a catalog reference and a catalog:

Figure 2.4. Links between products, catalog references and catalogs

The price or the catalog reference number can be customized by using a calculation script and adding formatted data. For more information on the customization of a catalog reference refer to chapter Creating a catalog (example scenario), section Creating catalog references in this guide.

It is also possible to classify your catalog references according to the standard of your choice.

Catalog management (example)

Prerequisites

A company requires data that is regularly updated in order to optimize its procurement management.

Before importing external data, you should be able to answer the following questions:

- Does my company have the IT competency required to import catalog data?

- Will my IT structure support the import of one or more catalogs, or tens of thousands of records?
- Will my company need to hire an outside contractor specialized in catalog production in order to import this data, or can I enter it myself into the AssetCenter database?
- What is the catalog data format (text, XML, ASCII, etc.)?
- What kind of data should I import? Do I need to import the entire catalog and all its information or just certain parts?
- How will I manage this data? Will this data concern my catalog management, my procurement management or the management of my entire portfolio?

Scenario 1: Importing catalog data into AssetCenter

In AssetCenter, you can integrate external data and update your catalog(s) dynamically:

Or by using Peregrine Systems' Connect-It application. This EAI application enables you to process external data and integrate it into your AssetCenter database.

Importing data with Connect-It

There are multiple catalog data sources, and they do not all use the same standards and media formats:

- The international UN/SPSC standard, a classification standard specific to the supplier, etc.
- Paper, CDR, FTP, e-mail, etc.
- XML or text file, Microsoft Excel file, Microsoft Access database, or other databases.

Depending on these parameters, a data import scenario should be provided by each catalog provider.

Importing catalog data in your AssetCenter database is made possible by Connect-It and this application's **XML**, **text**, **mail** and **database** connectors.

You can obtain an example scenario of a data migration from an online catalog from Peregrine Systems customer support.

Scenario 2: Organizing and distributing catalogs

In AssetCenter, you can determine which catalogs can be viewed by which of your company's branches.

The **Customers** tab in the detail of a catalog enables you to list all the companies that have access to a given catalog.

Scenario 3: Hierarchy of a catalog

Catalog products are organized hierarchically in AssetCenter, and their references can be classified.

This section presents the organization of a catalog and the best way to use it.

Before creating anything, you need to think about for whom this catalog is created and how it will be used in AssetCenter. Then, you need to be able to answer the following questions:

- What hierarchical system will I use: classification by brand, by use, by product, by reference, etc.?
- Will my catalog need a precise hierarchy or a general one?
- Is the data in my catalog purely for consultation purposes or will I use it in AssetCenter as part of my procurement cycle?

Defining a hierarchy for your catalog

You can determine how you want to classify your catalog references with AssetCenter. To do this, you need to populate the Product classification codes table (amProdClassCode) with the standards you use to manage your catalog.

This classification enables you to better decipher the information in your catalogs according to the standards you have in place. You can only use one standard per catalog, however.

For example, you can choose to use the UN/SPSC standard and view your catalogs according to the standard there within.

Using catalog data in AssetCenter

If you choose to use catalog data in AssetCenter, it is assumed that you are going to use this data in your procurement cycle.

In AssetCenter, you order items mainly through the use of catalog references. Purchasing these references will create new items in your portfolio, which are linked to your catalog references by a model.

In fact, for every created portfolio item there exists, via its model, a corresponding catalog reference.

Impact of the catalog on your portfolio

You can choose to manage your portfolio using any given catalog.

To do this, you should choose the creation of models according to the classification standard established for your catalog.

3 | Creating a catalog (example scenario)

CHAPTER

A vendor's catalog enables its customers to simplify their procurement management. This assumes, of course, that its customers' data is automatically updated and that it's arranged in a logical, tree-like structure.

The following example is taken from the viewpoint of the vendor, Hardware Inc. It illustrates how products, catalog references and catalogs are created.

 **Note:**

The catalogs, catalog references and products are associated with two linked tables: the Brands table and the Suppliers table (amBrand and amSupplier). These tables must be populated in order to perform our example.

We also recommend that you connect to the demonstration database (provided with AssetCenter for experimenting and performing examples) as an administrator.

Creating a product

Hardware Inc., specializing in IT-hardware sales, creates different products for its catalog.

The products will then be referenced in a catalog that you would have already created.

Creating a product

To create a computer-type product (a Macintosh G4):

- 1 Open the Products table via the **Procurement/Products** menu.
- 2 Click **New**.
- 3 Populate the **Description** field and **Brand** field.

If you use the catalog to order a product (not just to consult it), you need to specify the Macintosh G4 in the **General** tab.

- 4 Validate by clicking **Create**.

Manage a product's options

AssetCenter enables you to manage the options associated with a catalog product.

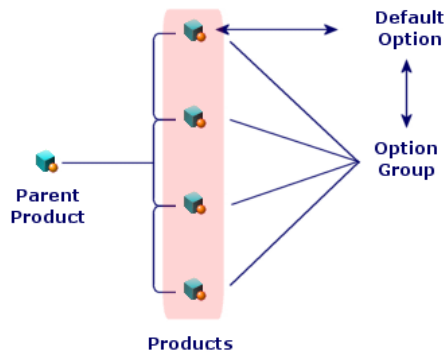
In AssetCenter, a product can have an option value. You can link as many options to a product as you want.

This is a double-functionality. First of all, it enables you to categorize into a hierarchy the products associated with a supplier package. Secondly, it enables you to choose from among different product options while placing an order.

Each product option is associated with a group of options, and there can only be one default option per option group. An option group can either be mandatory or not.

For example, when you buy a car, you can choose between a tape player (the standard default option) or a CD player, which is not the default option and for which you generally have to pay extra.

Figure 3.1. Logical structure of an option



Creating an option group

To create an option group:

- 1 Display the list of product options (**Administration/ List of screens**).
- 2 Click **New**.
- 3 Populate the **Name** field.
Example: **Mouse**
- 4 Select **Mandatory choice** (bMandatory).

This makes it mandatory to select an option from this group when a purchase request concerns a parent product.

Associating options to an option group

To associate options to an option group:

- 1 Display the list of products (**Procurement/ Products**).
- 2 Select a product that is an option.
Example: Intellimouse mouse device.
- 3 In the **General** tab, select **Is an option**.
- 4 Populate or select the **Option group** link.

Example: Select the **Mouse** link.

5 Click **Modify**.

Example of option management

Our example concerns the management of two option groups for the Deskpro 4000S product:

- The **Mouse** option group (choose between a standard mouse or the infrared mouse).
- The **CD recorder** option group (choose between an 8x or 16x CD recorder).

Let's have a closer look at the optional feature of two mouse devices associated with a computer:

- Select the IntelliMouse product.

This product is a default option of its parent product, the Deskpro 4000S: The **Optional** box is checked as well as the **Default option** box. This product belongs to the **Mouse Option group**.

- Select the Infrared Mouse product.

This product is an option of its parent product, the Deskpro 4000S: the **Optional** box is checked, and this product belongs to the **Mouse Option group**.

These two optional products belong to the same option group. One of them is the default option, the other is an option that will cost money.

 **Note:**

It is not mandatory, however, to define a default option for an option group, unless that option group is mandatory (**Mandatory choice** option (bMantory), selected in the detail of an option group).

You can only choose one default option per option group.

Creating a supplier package (bundle)

For example, to create the **Compaq Deskpro 4000S** supplier package, composed of a computer, a printer and a scanner, you need to perform the following steps:

- 1 Open the Products table via the **Procurement/Products** menu.
- 2 Now create the products composing the supplier package:
 - 1 Create the Deskpro 4000S product (the actual product, not the bundle):
 - Click **New**.
 - Populate the **Description** and **Brand** fields.
 - Validate by clicking **Create**.
 - 2 Create the LaserJet2100 Printer product:
 - Click **New**.
 - Populate the **Description** field with 'Laserjet 2100', as well as the **Brand** field.
 - Populate the **Component of** field with Deskpro 4000S Bundle.
 - Validate by clicking **Create**.
 - 3 Create the "Agfa DuoScan Hid scanner" product.

The creation process is identical to the one for the printer.

You just created a supplier package whose parent item is the Deskpro 4000S computer, composed of a printer and a scanner.

Quantities and supplier packages

You might find yourself in a situation where you need to create a supplier package composed of a non-uniform quantity of items.

Refer to the section Quantities and supplier packages of the chapter General concepts (Catalog).

Managing a product's measurement unit

AssetCenter enables you to manage a catalog product in one unit of measurement and to manage it in another unit of measurement as an asset in your portfolio.

The reconciliation between these two units is performed using the conversion coefficient defined for a product.

For more information, refer to the **Portfolio** guide, chapter **Portfolio items**, section **Models**, sub-section **Units used in batches**.

Determining a measurement unit for a portfolio item

The measurement unit of a portfolio item is determined in its model.

To determine the unit of a model, its nature must:

- Enable you to create an item in your portfolio.
- Have a management constraint of **Asset tag** or **None**.

To define a unit of a portfolio item, populate the **Unit used** field with the measurement unit of your choice (liter, ton, etc.).

Determining a measurement unit for a product

To define a unit of measurement:

- Select a product.
- In the **Acquis.** tab, populate the **Purchase unit** field with a unit of measurement (liter, ton, etc.).
- Validate.

Defining a conversion coefficient

The conversion coefficient enables you to specify the relation between the measurement unit in which you purchase a product and the unit in which you use the product once it joins your portfolio.

The unit of this coefficient is the one that you defined for the model which you specified in the **General** tab of a model's detail.

The **Conv. coeff** field is automatically populated when you populate the **Purchase unit** field. If this is not the case, you need to manually

populate it with the value that converts the purchase unit to the unit in which you use the product.

Managing a product's packaging

With AssetCenter, you can specify whether a product is sold as a packaged product. This specification impacts how a portfolio item is created when you receive the ordered product.

Whether a product is sold in a package or not determines how it is processed for sale.

If you have not defined a unit of measurement, you need to indicate the number of items in which the product is sold. For example, the Screen cleaner product comes in sets of six items (six bottles of cleaner in a box).

If you defined a unit of measurement, you need to indicate not only how many items make up the product, but also the reference quantity of each item (six bottles of screen cleaner; one liter per bottle).

Caution:

Choosing this option (sold packaged) and a measurement unit will modify the behavior of the procurement cycle, and it implies that you will manage your portfolio items differently from your products.

For example, if the product comes in a package of six bottles, requesting this product will lead to ordering six bottles.

For example, you can buy cement by the ton and manage it by sacks of 50 pounds.

To define a package for the Screen cleaner product, perform the following steps:

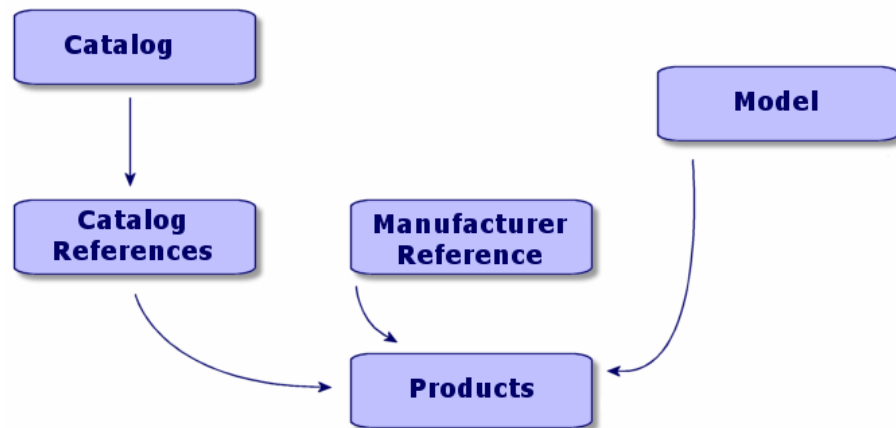
- 1 Create the Screen cleaner product.
- 2 Populate the **Purchase unit** field, in the **Acquis.** tab, with the unit of measurement **Liter**.
- 3 Select **Is packaged**.
- 4 Populate the **Number of items** field with the value **6**.
- 5 Populate the **Quantity per item** field with the value **1**.

This example implies that you manage items in your portfolio that have a packaged unit different from the unit in which you use (and manage) the item in the portfolio.

Creating a catalog

Catalogs in AssetCenter regroup the product references. You need to create the catalogs before putting the product references inside of them.

Figure 3.2. Overview of how the catalog works



To create a catalog, you must first populate the **General** tab of a catalog detail, then choose a default supplier associated with the catalog.

Populating the General tab

- Open the Catalogs table via the **Procurement/Catalogs** menu.
- Click **New**.
- Populate the mandatory fields **Name** and **Currency**. You can populate the optional fields if you want as well.

- Click **Create**.

Populating the Distributors tab

This tab lists the suppliers associated with the catalog and must contain at least one supplier in order to be included in the procurement cycle (1).

Add the supplier(s) associated with the catalog in this tab and populate the **Default supplier** field if necessary.

Populating the Customizations tab

This tab enable you to automate the calculation of a catalog using customizations. These customizations are essentially calculation scripts that are associated with additional data.


For more information about additional specifications, refer to this chapter's Additional specifications of catalog references section.

Creating catalog references

Associating a product to a catalog determines the catalog reference.

In this example, we use the catalogs in the demonstration database provided with AssetCenter 4.0.

To create a catalog reference:

- First method
 - 1 Open the Catalog screen.
 - 2 Select the desired catalog: Computinfo 2002.
 - 3 In the **References** tab, click  to associate a product to the selected catalog.
 - 4 In the window that appears, select the product that you want to add using either the drop-down list or the shortcut link.
 - 5 Populate the mandatory **Product** field.

The catalog reference field is automatically populated with the product name. You can modify this name if necessary.

- 6 If necessary, populate or modify the optional fields (**Price, Start of validity, End of validity, Certification**, etc.).
 - 7 Click **Add** to validate or **Add (multiple)** to create several catalog references of the same type.
- Second method:
 - 1 Open the catalog reference screen.
 - 2 Click **New**.
 - 3 Select the product to reference.
 - 4 Populate the mandatory **Catalog** and **Reference** fields.

The **Catalog** field references the catalog with which the product is associated.

The **Reference** field is automatically populated with the product name. You can modify this name if necessary.
 - 5 If necessary, populate or modify the optional fields: **Price, Start of validity, End of validity, Certification**, etc.
 - 6 Click **Add** to validate or **Add (multiple)** to create several catalog references of the same type.

Additional specifications of catalog references

Additional specifications enable you to calculate a price or a catalog reference using customizations. These customizations are essentially calculation scripts that are associated with additional data.

Calculating a catalog price

To calculate a catalog price, the **Additional formatted data** field (in the **Customizations** tab) is populated with certain values. These values are processed by a script, which calculates the price according to the selected quantity.

When you order this reference, the price will vary depending on the quantity you choose.

Calculating a catalog reference and a price associated with selection criteria

To calculate a price and a catalog reference according to certain criteria, you need to populate the **Additional formatted data** field (in the **Customizations** tab) with certain values. These values are processed by a script, which calculates the catalog reference and the price according to several criteria (the color and the size, for example).

When you order this reference, the price will vary depending on the color and size you choose.

Classification standard

You can determine which classification standard a catalog should use. Generally, the fields indicating this standard (or system of classification) will be automatically populated by the Connect-It EAI, which enables you to recover external catalog data with which to populate your AssetCenter database.

UN/SPSC standard

The UN/SPSC standard (United Nations/Standard Product and Services Classification) is the international standard of classification of product categories and services.

This classification standard is organized according to four levels:

Table 3.1. Example of UN/SPSC classification

UN/SPSC level	UN/SPSC code	UN/SPSC description
2 numbers	43000000	Communication, IT equipment, peripherals (devices), components
2 numbers	43170000	Hardware
6 numbers	43172200	Input peripheral (device)
8 numbers	43172205	Computer mouse

Managing your catalogs according to this standard enables you to:

- Automatically bring together several product/services catalogs.
- Reorganize your products or services.
- View acquired items or services according to their different levels.
- Facilitate your online purchasing steps.

Establishing a classification standard

Three steps are necessary to establish a classification standard:

1 Defining a standard of classification:

- Open the Classifications table (**Procurement/ Classification codes** menu item).
- Populate the **Classification** field.
You can decide to use, for example, the UN/SPSC standard.
- A dialog box appears asking you if you want to add this value to your itemized list. Click **Yes**.
- Populate the **Code** field.
Enter, for example, the code 0000001.
- Populate the **Label** field if necessary.
- Click **Add (multiple)**.
- Repeat this same operation for the next code and populate the **Parent item** if the second code is a sub-code of the first.
For example, you can specify that the code 0000010 is the sub-code of 0000001.
- Repeat this operation as many times as necessary to create your set of classifications.

2 Populating your catalog with the classification standard that you are using:

Populate the **Classification** field in the catalog's detail with the name of the standard you just entered in the Classifications table.

3 Populating your catalog references with the codes you previously entered.

- Select a catalog reference.
For example, select the catalog reference R01-01.

- Populate the **Classification code** field by selecting one of the values from the drop-down list.

For example, use the code 0000001.

- Click **Modify**.
- Repeat this operation for each catalog reference you need to classify.

If you want to link your catalog references to a given model, populate the model field with its equivalent catalog in the list of classification codes (**Procurement/ Classification codes**).



Note:

This method is only really useful if you have just a few catalog items to classify. If you import large amounts of catalog data and want to use a given classification standard, you should use a Connect-It scenario or contact Peregrine Systems customer support.

Using a catalog in the procurement cycle

The catalog comes into play at two different moments in the procurement cycle: in the purchase request and in the purchase order composition.

The purchase request is normally based on the model. It is, nevertheless, possible to base a purchase request on a catalog reference. This function will be further developed in the first part of this section.

A purchase order is normally based on a catalog product reference. We will look more closely at the different types of orders in the second part of this section.

The catalog in a purchase request

For all general information concerning purchase requests, refer to the AssetCenter 4.0 **Procurement** guide.

To access a catalog reference in a purchase request:

- 1 Create a new purchase request.
 - 2 Add a purchase request line in the **Composition** tab.
 - 3 You can access the catalog references using the **Reference** field in the new screen that appears.
 - 4 Click **Add** or **Add (multiple)** to add additional catalog references.
-

 **Note:**

If the requested items are referenced with different suppliers, you will have as many orders as there are different suppliers.

The catalog in a purchase order

For all general information concerning purchase orders, refer to the AssetCenter 4.0 **Procurement** guide.

The purchase order can be made from a validated request, but it is not necessary. Both cases are discussed in this section.

The catalog in a purchase-order wizard

In AssetCenter, it is possible to launch a purchase-order wizard to order a product directly from a validated request.

To access a catalog reference in a wizard:

- 1 Select your validated request and launch the wizard by clicking **Order**.
- 2 Select the **Choose in a catalog or at a supplier** option.
- 3 Select the search type you want to use for the catalogs: by catalog name or by supplier name.
 - If you perform a search by supplier, AssetCenter will search for all the suppliers, in the Companies table (amCompany), who are associated with the selected model.
 - If you perform a search by catalog, AssetCenter will search for all the catalogs, in the Catalogs table (amCatalog), which are associated with the selected model. You can choose to restrict

your search to the catalog's default supplier if you wish (**Take default supplier** option).

- 4 Select the supplier or the catalog associated with the request and click **Next**.

Order not associated with a request

The procurement-cycle constraints make it so it's impossible to order and receive an item - which needs to be created in the database - if you do not have the original request with which it is associated.

Nevertheless, you are not obliged to make a purchase request before ordering a product. Placing an order can be done directly with a catalog reference.

When you place an order with the supplier:

- If an ordered item has an associated model, you need to create a request corresponding to this model.
- If no models are associated with the order, then you can go ahead and place the order, but the reception will not create any assets in the database.

To access a catalog reference in an order:

- Create your purchase order.
- In the **Composition** tab, add a new purchase order line.
- You can access the catalog references using the **Reference** field in the new screen that appears.
- Click **Add** or **Add (multiple)** to add additional catalog references.

Each purchase order is associated with a specific supplier. It is thus not possible to have two different suppliers in one order.

To integrate your order into the normal procurement cycle, click **Request** to create the request associated to the order.

Creating a supplier package (bundle)

A supplier package is the association of several products to a catalog reference.

Each of these products has a different catalog reference.

Creating catalog options

The ordering wizard can order options that are associated by default with a product.

If you want to choose an option that is not the default option, you need to create an extra request and order line.

Receiving an order

When you create a purchase request or a purchase order, you are creating composition lines for that request or order.

Each purchase-order composition line creates an item in the portfolio once that order is received.

If the order does not have a corresponding model in the portfolio, AssetCenter proposes that you create one. Refer to the **Portfolio** guide for all the information linked to the creation of a model.

If you are using the UN/SPSC standard (United Nations Standard Products and Services Codes), AssetCenter will create models associated with the purchase order according to this international standard.

4 Interface (Catalog)


CHAPTER

Configuration


The catalog is only available if you have activated the Procurement module.

Screens pertaining to catalogs, catalog references and products


To access the list of catalogs, perform one of the following actions:

- Select **Procurement/ Catalogs**.
- Click  in the toolbar.

To access the list of catalog references, perform on the following actions:

- Select **Procurement/ References**.
- Click  in the toolbar.

To access the list of products, perform one of the following actions:

- Select **Procurement/ Products**.
- Click  in the toolbar.

Tabs common to all screens

The catalog, catalog reference and product screens all have certain tabs in common.

History tab

For a complete description of this tab, refer to the "General interface" guide.

Documents tab

This tab enables you to specify which document(s) you want to associate to a catalog.

To associate a document to a catalog:

- Populate the **File** field with the path to your file, or click the **Folder** icon.
- The **Designation** and **Date** fields are automatically populated.
- You can populate the **Category** field with the category to which the document belongs (invoice, contract, etc.).
- Populate the **Remarks** field if necessary.

List of catalogs

For each catalog selected or created, two mandatory fields and one optional field should be populated:

- The **Name** field: name of the catalog.
- The **Currency** field: currency used for this catalog.
- The **Description** field: description of the catalog.

There is no hierarchical presentation of these catalogs.

The detail of a catalog line is composed of seven tabs:

- General
- References
- Customers
- Distributors
- Customizations
- History
- Documents

The General tab

This tab contains the following information:

- **Start of validity:** the date on which this catalog becomes valid in accordance with the supplier.
- **End of validity:** the date on which this catalog becomes invalid in accordance with the supplier.
- **Source:** this catalog's data source (mail, FTP, etc.).
- **Last reconciliation:** date-type field corresponding to the catalog's last update by an external procedure.
- **Classification:** type of classification used for the catalog references.
- **Asset:** AssetCenter's asset tag for the catalog.
- **External:** a check box that can validate (or not) that the catalog is an external data source (FTP, CDROM, etc.).
- **URL:** URL address of the catalog.
- **Contract:** contract associated with a catalog.
- **Supervisor:** person in charge of this catalog.
- **Contact:** contact associated with this catalog.
- **Location:** location of the catalog. This field is entirely customizable. For example, the location can define what regions can use the catalog: Asia, North America, Europe, worldwide, etc.
- **Remarks:** open remarks associated with the catalog.

The References tab

This tab lists the catalog references.

The Customers tab

This tab helps you manage several companies at once. It lists all the client companies of a parent company and, using the appropriate scripts, authorizes or denies access to catalogs according to the rights these companies have.

The Distributors tab

This tab lists the supplier(s) of the same catalog. In the case where several suppliers are listed, you can specify which supplier you want as your default supplier in the **Default supplier** field.

The Customizations tab

This tab takes information from the additional formatted data listed in the **Customizations** tab of the **Catalog references** screen.

List of catalog references

This screen lists the references from all your catalogs. These references can be categorized.

Each reference selected is detailed in the following tabs:

- General
- Customizations
- History
- Documents

Each reference created or selected is populated in the two mandatory fields that follow:

- **Catalog:** catalog to which the catalog reference is attached.
- **Reference:** reference number of the catalog.

General tab

This tab regroups the main information attached to a catalog reference.

- **Product:** product associated with the catalog reference. This can be one product or a set of products.
- **Description:** description of the catalog reference. Enter your product's description in this field, which is entirely editable.
- **Classification code:** code associated with the catalog reference that enables it to be classified according to a given standard. This field must respect the following syntax:

```
classification, number
```

For example:

```
UNSPSC, 01234567
```

- **Start of validity:** the date on which this catalog becomes valid in accordance with the supplier.
- **End of validity:** the date on which this catalog becomes invalid in accordance with the supplier.
- **Price:** product's price.
- **Update date:** date of the last update made to this catalog reference.
- **Discount:** discount on the price of the product reference.
- **Min. Qty.:** minimum quantity that can be purchased.
- **Qty avail:** quantity available in stock.
- **Certification:** itemized list populated by the employee who manages the catalog. This field enables that person to set a degree of certification required for a given catalog.
- **Delivery time**
- **Remarks:** open remarks associated with the catalog reference.

The Customizations tab

This tab regroups all the customizations made to the calculation of a catalog reference's price.

These customizations are essentially calculation scripts associated with additional formatted data.

- The **Script (price)** field is a link to the calculation script of a catalog reference's price.

- The **Script (reference)** field is a link to the calculation script of a catalog reference.
 - The **Additional formatted data** contains data that can be used by the two previous scripts.
-

 **Note:**

These calculation scripts are used in the procurement procedure. In absence of these scripts, the values in the **Price** and **Discount** fields of the **General** tab will be used.

List of catalog products

This screen lists, in a hierarchical form, all the different products in a catalog.

For each product selected or created, the following information is available:

- **Description:** description of the product.
- **Brand:** brand associated with the product.

The catalog product screen contains the following tabs:

- General
- Composition
- References
- Acquis.
- Photo
- History
- Documents

The General tab

This tab regroups the following information that is linked to a product:

- Identification
- Optional

- **Preinstalled:** This option only appears if the product is associated to a parent item. It indicates that the product is an item which must be associated to its parent item.

Identification

- **Model:** model to which the product is attached. This field is filtered to offer you only those choices corresponding to the value in the **Brand** field.
- **Category:** indicates the hierarchical order of the product (nature/model/sub-model/product). This field is automatically populated.
- **Component of:** specifies the parent product of the selected product (if there is one).

Is an option

This frame enables you to specify whether or not the product is an option. It only appears if the product is a component of another product.

- **Optional:** designates a product's status as optional or not.
- **Default option:** specifies whether or not the product is the option by default.
- **Option group:** designates to which group of options your optional product belongs.

You can only have one default option per option group.

The Composition tab

This tab lists the products associated with the selected product.

The References tab

This tab lists the reference(s) of the product selected in its catalog(s).

The Acquis. tab

This tab summarizes the acquisition conditions of a product.

- **Price:** generally quoted price of a product.
- **Purchase unit:** the unit used for purchasing this product. When buying cement, for example, you can purchase it either in tons or in pounds.

 **Note:**

For more information, refer to the **Portfolio** guide, section **Units**.

- **Packaging:** itemized list enabling you to specify how the product is packaged.
- **Certification:** itemized list enabling you to set a degree of certification for the selected product.
- **Certification date** and **Certification end date**
- **Conv. Coeff.:** the conversion coefficient used to transform a product into an asset.

For example, you can purchase a product in tons, but use it in pounds once it is an asset in your portfolio.

- **To print:** if you check this box, it prints the product in the purchase request.

Is sold packaged

This frame enables you to specify how the product is sold (in batches of 2, 3, etc.).

- **Number of items:** defines how many items come in the packaged product.

For example, a product contains two units per package.

- **Quantity per item:** defines how much each item contains.

For example, if a product is sold in bottles, each bottle might contain 1 liter.

Warranty

Information relating to a product's warranty:

- **Warranty duration**

- **Conditions**
- **Contact**

Screens linked to catalogs, catalog references or products

Company catalogs

The **Catalogs** tab of a company's detail regroups all the catalogs that are:

- Distributed by the company
If the **Suppliers** tab of the catalog's detail is populated with the name of this company.
- Used by the company
If the **Client** tab of the catalog's detail is populated with the name of this company.

Models

The **Cat. info.** tab contains:

- The catalog reference associated by default with the selected model.
- The product or products associated with the model.

Purchase requests

The composition of a purchase request relies on either a model or a catalog reference. The **Reference** field of a purchase request's composition enables you to specify this catalog reference.

Purchase orders

The composition of a purchase order relies on a catalog reference. The **Reference** field in the composition of a purchase order enables you to specify this catalog reference.

Receiving/Returning

The detail of a receipt line or a return line is populated by a catalog reference.

5 Glossary (Catalog)

CHAPTER

This section contains a glossary of the terms used in the Catalog module.

 Note:

The terms are not classified in alphabetical order.

Product

The product is an item that is outside of your company. It corresponds to one or more references in the catalogs of your suppliers. Example: The HP VECTRA VL 800 product corresponds to a reference in the Micro catalog, a reference in the Direct catalog, etc. A product can correspond to one item (one CPU, for example), or a set of items (a supplier package, for example).

AssetCenter table that describes these objects

Products (amProduct)

Component

A component is a product that is associated with a parent product. Example: The Optical mouse device is the component of the OptiPlex GX 110 product.

Purchase unit

The purchase unit is the unit used by your supplier to sell a particular product. Example: Your supplier sells sand by the ton. The ton is the purchase unit.

Sold packaged

This a way of selling a product. Example: Ink is sold in boxes of 50 cartridges.

Conversion coefficient

A coefficient enables you to convert a product's purchase unit into the unit you use to manage it in your portfolio. Example: You bought sand by the ton, but now you are going to enter it in your database by units 50-pound bags.

Additional formatted data

Additional formatted data is the data that enables you to calculate a price or a catalog reference (see additional specifications).

Additional specifications

This is a way of defining a request according to several variables.
Example: The request for a cable is defined by its length and its diameter.

Option

A product that is an option is one that is associated with a parent product, and thus cannot be detached from this product. Example: The color of a delivery truck is an option (it can't be sold separately).

Option group

An option group regroups different options that all share certain features. Example: The CD option group regroups the following options: CD drive, CD-ROM drive, CDR drive, DVD drive, DVDR drive.

Composition

The association of different products with a parent product is a composition. Example: A mouse, a keyboard and a CD drive are all associated with a CPU.

Catalog references

A catalog reference ties a product to a catalog. This association includes the creation of a reference and the assignment of a price.

AssetCenter table that describes these objects

Catalog references (amCatRef)

Manufacturer's reference

The manufacturer's reference is the identification number of a product that is specified by its manufacturer.

Internal reference

An internal reference is the identification number of a product assigned by an AssetCenter counter.

Certification

The certification is the approval accorded by the company concerning a product.

Classification

This is the classification standard assigned to a catalog that enables it to classify the types of products on the market.

Classification code

The classification code is associated with a catalog reference according to the classification defined in the catalog.

6 References (Catalog)

CHAPTER

Menus and tabs (Catalog)

The data in the Catalog module is accessible using the following menus, tabs, links and fields:

Table 6.1. Menus and tabs (Catalog) - list

Sub-menu	Table that the menu accesses (label and SQL name)	Dedicated tabs, fields or links	Section of the guide to consult
<u>File menu</u>			

Sub-menu	Table that the menu accesses (label and SQL name)	Dedicated tabs, fields or links	Section of the guide to consult
Activate the modules	<p>Enables you to activate or deactivate the Catalog module, if your license file allows it.</p> <p>Note:</p> <p>The Catalog module is not visible; it is linked to the Procurement module.</p> <p>This is the menu to use if you can't see the following menus in your application:</p>	Does not apply	Refer to the Using AssetCenter guide, chapter Customizing a client workstation , section Activating the modules .
Procurement menu			
Catalogs	Catalogs (amCatalog)	All	Chapter Creating a catalog (example scenario) , section Creating a catalog .
References	References (amCatRef)	All	Chapter General concepts (Catalog) , section Catalog references .
Products	Products (amProduct)	All	Chapter General concepts (Catalog) , section Catalog products .
Classification codes	Product classification codes (amProdClass)	All	Chapter Creating a catalog (example scenario) , section Classification standard .
Tools menu			

Sub-menu	Table that the menu accesses (label and SQL name)	Dedicated tabs, fields or links	Section of the guide to consult
Actions/ Edit	Actions (amAction)	None	Refer to the Using AssetCenter guide, chapter Reference information , section Actions .
Actions/ <Name of action>	Proposes the actions that are either non-contextual or whose contexts are active. Enables you to trigger the selected action.	Does not apply	Chapter References (Catalog) , section Actions and wizards (Catalog) .
Customize toolbar	Enables you to add or remove icons from the toolbar.	None	Chapter References (Catalog) , section Toolbar icons (Catalog) .
Reporting/ Reports	Reports (amReport)	None	Chapter References (Catalog) , section Reports and forms (Catalog) .
Reporting/ Forms	Forms (amForm)	None	Chapter References (Catalog) , section Reports and forms (Catalog) .
Administration menu			
Itemized lists	Itemized lists (amItemizedList)	None	Chapter References (Catalog) , section Itemized lists (Catalog) .
Counters	Counters (amCounter)	None	Chapter References (Catalog) , section Counters (Catalog) .
Calculated fields	Calculated fields (amCalcField)	None	Chapter References (Catalog) , section Calculated fields (Catalog) .

Sub-menu	Table that the menu accesses (label and SQL name)	Dedicated tabs, fields or links	Section of the guide to consult
List of screens	Enables you to access tables that are not accessible by the present menus. This task is reserved for the administrator since these tables were not really designed to be modified.	None	Refer to the Using AssetCenter guide, chapter Record lists , section Using lists .

Toolbar icons (Catalog)

Certain toolbar icons are specific to the Catalog module.

To obtain this list and add these icons to the toolbar:

- 1 Select the **Tools/ Customize toolbar** menu.
- 2 Select the **Tools** tab.
- 3 Select **Catalog** in the **Categories** list.

For more information on how to customize the toolbar, refer to the **Using AssetCenter** guide, chapter **Customizing a client workstation**, section **Customizing the toolbar**.

Interface options (Catalog)

There are no interface options specific to the Catalog module.

Tables (Catalog)

The Catalog module uses a number of tables:

The following tables are linked to the Catalog module:

Table 6.2. Tables (Catalog) - list

Table label	SQL name of the table	Menus enabling you to access the table	Section of the guide to consult
Tables directly linked to the Catalog module			
Catalogs	Catalogs	Procurement	Chapter Creating a catalog (example scenario) , section Creating a catalog.
References	References	Procurement	Chapter General concepts (Catalog) , section Catalog references.
Products	Products	Procurement	Chapter General concepts (Catalog) , section Catalog products.
Classification code	Classification code	Procurement	Chapter Creating a catalog (example scenario) , section Classification standard.
Tables indirectly linked to the Catalog module			
Units	Units (amUnit)	Administration	Chapter General concepts (Catalog) , section Catalog products.
Models	Models (amModel)	Portfolio	Chapter General concepts (Catalog) , section Models.
Suppliers	Companies (amCompany)	Portfolio	Chapter Creating a catalog (example scenario) , section The catalog in a purchase-order wizard.

Interdependence of tables (Catalog)

The Catalog module uses numerous tables in the AssetCenter database. There are multitudes of links between these tables. It is thus convenient to optimize the order in which you populate these tables.

The order that we propose below is not mandatory: AssetCenter enables you to create missing records in linked tables whenever it is necessary.

Tip:

We recommend that you create the products, then the catalogs and finally the catalog references.

Here is a table that optimizes the order of how you should create your records. It indicates which dependant tables you need to populate.

Secondary tables not directly linked to the Catalog module are not included here. They are automatically populated when you create records in the main tables.

Table 6.3. Interdependence of tables (Catalog) - table

Table (label and SQL name)	Tables to populate beforehand (label and SQL name)
Products (amProduct)	<ul style="list-style-type: none"> • Models (amModel) • Natures (amNature) • Units (amUnit)
Catalogs (amCatalog)	<ul style="list-style-type: none"> • Companies (amCompany) • Product classification (amProdClass)
Catalog references (amCatRef)	Product classification code (amProdClassCode)

Itemized lists (Catalog)

You can select the value of certain fields using an open or closed itemized list.

To access the **Itemized lists** table (**amItemizedList**), use the **Administration/Itemized lists** menu.

The following table details the itemized lists specific to the Catalog module.

Table 6.4. Itemized lists (Catalog) - list

Itemized list identifier	Fields populated using an itemized list (label and SQL name)	Table in which field is found (label and SQL name)
amCertification	Certification (amCertification)	Products (amCatProduct)
	Certification (amCertification)	Catalog references (amCatRef)
amProdClass	Classification (amProdClass)	Catalog (amCatalog)
	Product classification (amProdClass)	Classification code (amProdClass)
amPackaging	Packaging (Packaging)	Products (amCatProduct)
amWarrCond	Conditions (WarrCond)	Products (amCatProduct)

For more information about itemized lists, refer to the **Advanced use** guide, chapter **Itemized lists**.

Calculated fields (Catalog)

The Catalog module uses a number of calculated fields:

These calculated fields are used in the default values of certain fields.

To access the **Calculated fields** table (**amCalcField**), use the **Administration/Calculated fields** menu.

The following table describes the calculated fields specific to the Catalog module.

Table 6.5. Calculated fields (Catalog) - list

Label of the calculated field	SQL name of the calculated field	Label and SQL name of the field that uses the calculated field	Use
ProductUnit	sysCoreProductUnit	amProduct	This field displays the unit used and the packaging of a product for a given catalog reference.

You can customize these calculated fields.

For more information about calculated fields, refer to the **Advanced use** guide, chapter **Calculated fields**.

For more information on writing scripts, refer to the **Advanced use** guide, chapter **Scripts**.

For more information on using APIs, refer to the **Programmer's reference** guide.

Counters (Catalog)

The Catalog module uses a number of counters:

These counters are used in the default values of certain fields.

To access the **Counters** table (amCounter), use the **Administration/Counters** menu.

The following table details the counters specific to the Catalog module.

Table 6.6. Counters (Catalog) - list

SQL name of the counter	Label and SQL name of the table that uses the counter	Label and SQL name of the field that uses the counter
amCatalog_Code	Catalog (amCatalog)	Code (Code)
amProdReserv_ItemNo	Reservation (Reservation)	Numbe (ItemNo)

For more information about counters, refer to the **Administering the database** guide, chapter **Standard database description files**, section **Customizing the database**, sub-section **Counters in field default values**.

Actions and wizards (Catalog)

The Catalog module does not use any actions to automate its common tasks.

You can access the **Actions** table (**amAction**) using the **Tools/ Actions/ Edit** menu item.

For more information on using actions, refer to the **Advanced use** guide, chapter **Actions**.

For more information on writing scripts, refer to the **Advanced use** guide, chapter **Scripts**.

For more information on using APIs, refer to the **Programmer's reference** guide.

AssetCenter Server modules (Catalog)

There are no AssetCenter Server modules dedicated to the Catalog module.

For more information about AssetCenter Server, refer to the **Administering the database** guide, chapter **AssetCenter Server**, section **Configuring the modules monitored by AssetCenter Server**.

Components of the System data and Line-of-business data (Catalog)

AssetCenter is provided with a standard set of data.

These data sets are a part of one of the following groups:

- **System data:** data that is indispensable in order for AssetCenter to function.
- **Line-of-business data:** basic data that you can insert into your working database if you find it useful to do so.
This data is divided into functional sets.
- **Sample data:** data that is useful to familiarize yourself with AssetCenter.

System data specific to the Catalog module

For the Catalog module, **system data** contains data for the following tables:

- Calculated fields (amCalcField)
- Currency (amCurrency)
- Exchange rate (amCurRate)

The **system data** data specific to the Catalog module is automatically a part of the demonstration database installed with AssetCenter.

The **system data** data specific to the Catalog module is a part of your working database if you choose this option with AssetCenter Database Administrator.

Line-of-business data data specific to the Catalog module

For the Catalog module, the **line-of-business data** contains data for the **Reports** table (amReport).

The **line-of-business data** data specific to the Catalog module is automatically a part of the demonstration database installed with AssetCenter.

The **line-of-business data** data specific to the Catalog module is a part of your working database if you choose this option with AssetCenter Database Administrator.

Reports and forms (Catalog)

AssetCenter is provided with forms and reports. Certain are specific to the Catalog module.

In order for these reports and forms to be available in your database, you must import them from the AssetCenter Database Administrator.

Importing and identifying reports specific to the Catalog module

To find out how to import reports, refer to the **Advanced use** guide, chapter **Crystal Reports**, section **Operation and installation of the report generator**, sub-section **Installing preconfigured Crystal Reports in your database**.

To identify the reports specific to the Catalog module, refer to the **Advanced use** guide, chapter **Crystal Reports**, section **Identifying Crystal reports specific to a given module**.

Importing and identifying forms specific to the Catalog module

To find out how to import forms, refer to the **Advanced use** guide, chapter **Forms**, section **Installing preconfigured forms into your working database**.

To identify the forms specific to the Catalog module, refer to the **Advanced use** guide, chapter **Forms**, section **Identifying forms specific to a given module**.

Background processes (Catalog)

For more information on the automatic background processes executed by AssetCenter, consult the **Database structure** guide. For each table discussed in this guide, you will find an **Background processes** section.

To find out where to find the **Database structure** guide, consult this guide, chapter **References (Catalog)**, section **Other documentation (Catalog)**.

APIs (Catalog)

Certain AssetCenter APIs effect the Catalog module.

These APIs perform the following functions:

- Add catalog reference to an order line.

To obtain a list and description of the APIs of the Catalog module, refer to the **Programmer's reference** guide.

Views (Catalog)

There are no views by default dedicated to the Catalog module.

For more information on using views, refer to the **Using AssetCenter** guide, chapter **Using views**.

Other documentation (Catalog)

The **AssetCenter 4.1.0 - Catalog** guide does not provide information directly linked to the Catalog module.

To obtain associated information not covered in this guide, we recommend that you read the following documents:

Table 6.7. Other documentation (Catalog) - list

Document	Information	Format	Location in the AssetCenter installation folder
Installation	• Installation of AssetCenter	Hard copy	\doc\pdf\installbook*.pdf
		Online	\doc\chm\installbook*.chm

Document	Information	Format	Location in the AssetCenter installation folder
Core tables	• Location management	Hard copy	\doc\pdf\core*.pdf
	• Employee management	Online	\doc\chm\core*.chm
	• Feature management		
	• Etc.		
Using AssetCenter	• General interface of the application	Hard copy	\doc\pdf\intro*.pdf
		Online	\doc\chm\intro*.chm
Procurement	The catalog in the procurement cycle	Hard copy	\doc\chm\procur*.pdf
		On line	\doc\chm\procur*.chm
Administering the database	• Customization of the database	Hard copy	\doc\pdf\admin*.pdf
		Online	\doc\chm\admin*.chm
Advanced use	• Utilization of wizards	Hard copy	\doc\chm\advan*.pdf
	• Utilization of calculated fields	Online	\doc\chm\advan*.chm
	• Itemized-list management		
	• Creation of scripts		
Help on fields and links	• Utilization of database fields and links	Online	To access contextual help on a field or link: <ul style="list-style-type: none"> 1 Select a field or link. 2 Perform one of the following actions: <ul style="list-style-type: none"> • Right-click and select Help on this field from the shortcut menu. • Press Shift and F1 simultaneously on the keyboard. • Select the Help/Help on this field menu.
Programmer's reference	• Utilization of APIs	Hard copy	\doc\pdf\progref*.pdf

Document	Information	Format	Location in the AssetCenter installation folder
Database structure	<ul style="list-style-type: none"> List of the database's tables, fields, links and indexes Automatic agents triggered by AssetCenter. 	Text file	<ul style="list-style-type: none"> \infos\database.txt \infos\tables.txt
		Hard copy	\doc\pdf\dbstruct*.pdf
		Online	\doc\chm\dbstruct*.chm
General online help	<ul style="list-style-type: none"> The functioning of the entire application 	Online	<p>To access general online help, perform one of the following actions:</p> <ol style="list-style-type: none"> 1 Press F1 on the keyboard. 2 Select the Help/ Index menu.



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