HP OpenView AssetCenter

Software version: 5.0

User Interface

Legal Notices

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Preface

This guide's objective is to familiarize you with AssetCenter. It details the basic operations that you will perform during your use of the application.

This guide also documents the application's graphical user interface and how to use it.

The following chapters present the application's GUI functions.

These chapters are for:

- First-time users.
- Users already familiar with AssetCenter and who wish to discover the changes in this version.

1 Welcome to AssetCenter

AssetCenter is a complete IT management system, comprised of several modules that are totally integrated and share a common repository. AssetCenter enables you to manage your portfolio and the events associated with the life cycle of the items in your portfolio: Procurement, cost management (tax, TCO, maintenance contracts, work orders, etc.).

Because AssetCenter is an "integrated" application, you can access all its functions from the same interface and work on a single database. Among other advantages, this avoids you having to duplicate information. Because it is a "functional" application, you can adapt its interface to your own needs by selecting only he functions you want to access. The interface is thus much simpler to use.

Important:

The list of available functions depends on the license rights you have acquired from HP.

A user can access the AssetCenter database in different ways:
- Via the Windows client
- Via the Web client

The Windows and Web clients have distinct interfaces and provide different functionality. This guide describes those differences.

This guide is an introduction to the software and to certain essential concepts that will enable you to familiarize yourself quickly and effectively with AssetCenter's GUI.

Conventions used in this guide

What follows is a list of the conventions that we use in this guide

Convention	Description
`Java Script Code`	Example of the code or command
`Fixed-width characters`	DOS command, function parameter or data format
`...`	Portion of omitted code or command
Note: Extra information	Informative note
Important: Be careful...	Important information for the user
Tip: User tip	Tip to help you use the application
Warning: Exercise caution	Extremely important information for the user
Object	AssetCenter GUI object: menu, menu entry, tab or button

The following conventions are also used:

- The steps that we ask you to follow are listed in a defined ordered (in a numbered list). For example
  1 First step
  2 Second step
  3 Third and last step

- All the illustrations and the tables are numbered according to the chapter in which they are found, and the order in which they appear in the chapter. For example, the title of the fourth table in chapter two will be prefixed by **Table 2-4**.

Online help

Online help displays help messages on screen while you are using AssetCenter.

Several systems of online help are available to you in your search for information.

General online help

Windows client

General online help contains approximately the same information as in the printed guides.

To display online help, simply press *F1* from within AssetCenter.

> 🖉 Note:
>
> There is another online help specific to Basic scripts. (A Basic script is a simple program enabling you to customize and/or systematize the behavior of certain parts of the software.) When you use a Basic-script editing window, you can press *F1* on the keyboard to display the AssetCenter programming reference, which is the online help for scripts. For example, if you forget the exact syntax of a Basic function while you are creating a script, you just need to select the name of the function in your script and press F1. The programming reference will open to the part dedicated to that function.

Web client

This functionality is not available.

Context-sensitive help for fields and links

Windows client

Context-sensitive help for a field or a link displays:

- The SQL name of the field or link.
- Its type and data-entry format.
- A description of the field or link contents.
- Examples, such as sample data.
- Important information: Data entry precautions, automatic mechanisms, etc.
- System itemized-list values.
- The identifier of customizable itemized lists.
- Linked tables.

There are several ways to access the context-sensitive help:

- Put your cursor on the field or link, then simultaneously press the *SHIFT* and *F1* keys.
- Right-click the field or link, and then select **Help on this field** from the shortcut menu.
- Go to the field or link and then select the **Help/ Help on this field** menu.

Web client

This functionality is not available.

Tip of the day

Windows client

The tip of the day is an online help that displays tips for using AssetCenter each time you start the application.

You can disable this functionality by clearing the **Show at startup** box in the Tip of the day window. Click **Next** to display another tip.

You can display tips at any moment via the **Help/ Tip of the day** menu item.

If you wish to reactivate the Tips of the Day at startup, select **Help/ Tip of the day** and select the **Show at startup** option.

Web client

This functionality is not available.

Introduction to the database

AssetCenter is used in conjunction with a database. The AssetCenter workspace, and, in particular, its database interface functionalities, were designed to hide the complexity of the database as much as possible. However, basic knowledge of databases will help you with the concepts that are often used in the AssetCenter user guides.

Definition of a database

A database is an entity that stores data in a structural manner and with as little redundancy as possible. This data is used by programs (in our case, AssetCenter) and by its users (you). The concept of a database is frequently associated with the concept of a network: A database unites the various data contained within it so it can be accessed by all; a network unites the various information stored on remote computers so it is available to all. This type of

database is called a distributed database. Its main advantage is that it enables several users to access the stored information simultaneously (or concurrently).

Database

Clients
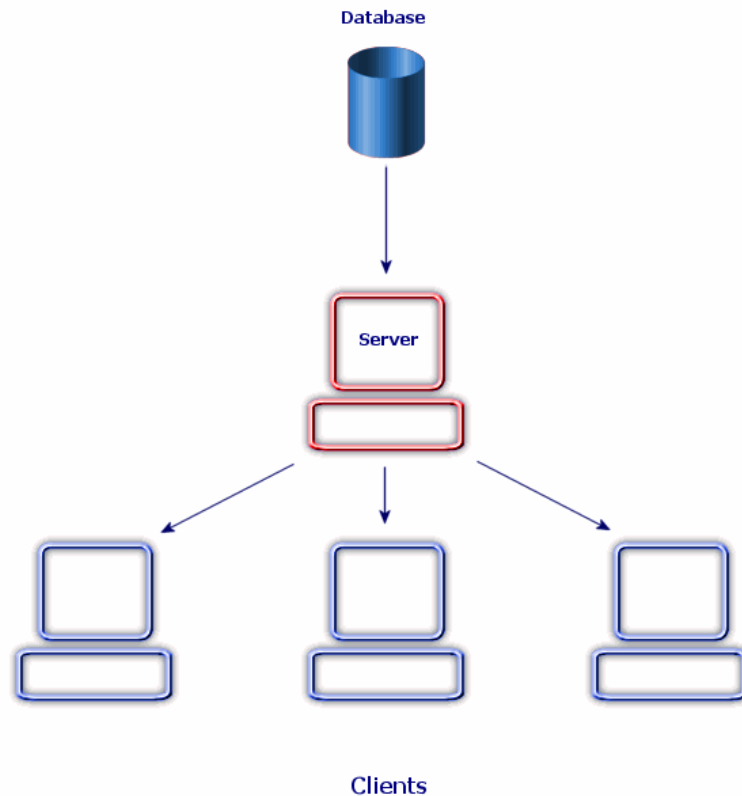
Database Management System

To manage the data and the users that access that data, we use a Database Management System (DBMS), which enables you to:

- Store data,
- Access data.
- Manage the access of the users to this data.
- Perform basic operations on this data.
  - Insert: Adding data.
  - Delete: Destroying data.

- Modify: Modifying data.
- Search for data.

AssetCenter is compatible with the main DBMSs available on the market.

Database models

Two main database models are frequently used to represent the organization of information.

The hierarchical model

In this model, data is organized hierarchically as shown below:
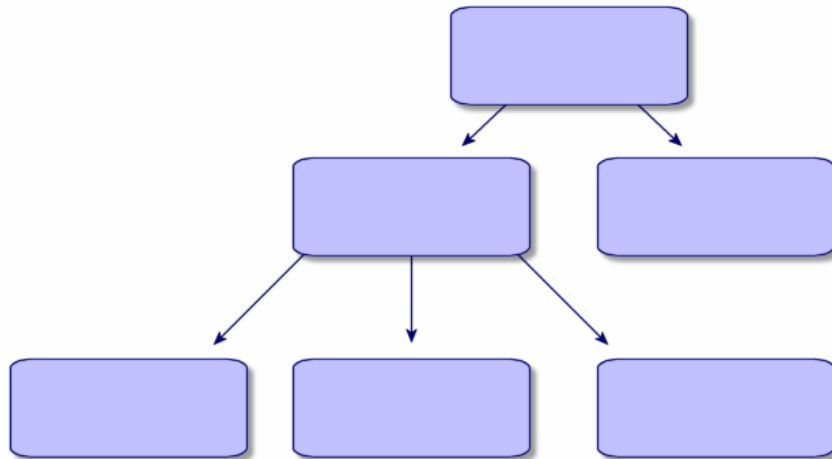
The relational model

In this model, data is organized in two-dimensional tables (rows and columns), as shown below:

Column

Row →
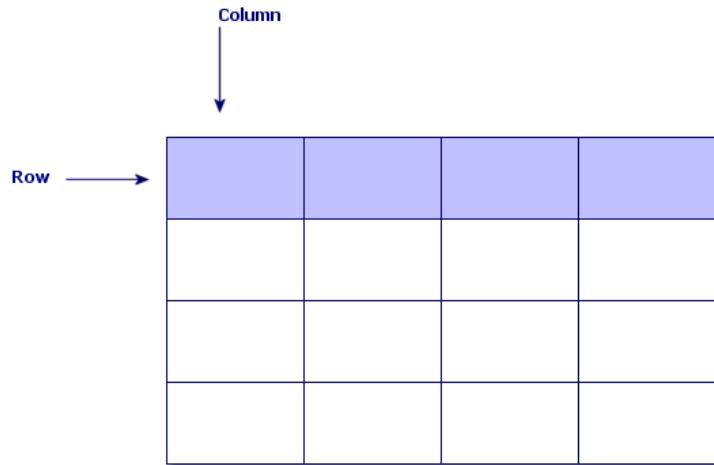
Using the relational model, we thus also define:

- A record as a set of data contained in one of the rows of a table.
- A field as the title of one of the columns in a table.
- The value of a field as the value of one of the cells in the table.

AssetCenter introduces two related concepts:

- A list is composed of a set of records from a table.

- A detail regroups the information from a given record and categorizes them in a logical fashion.

Field

Record →

List
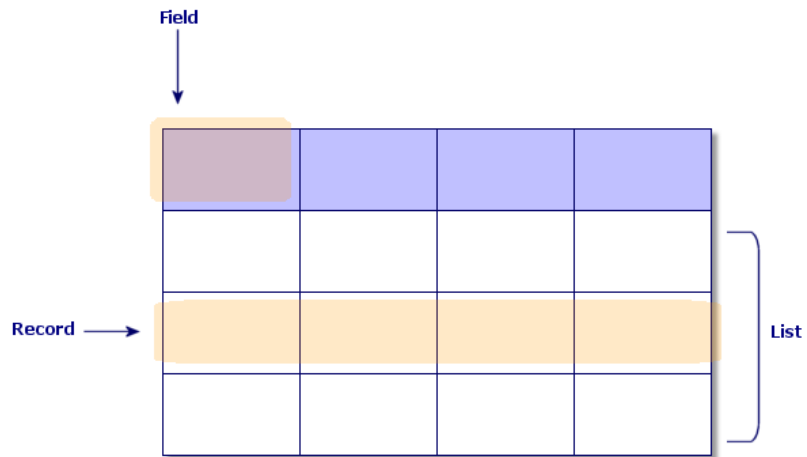
Try to remember these concepts as best as you can, since you will come across them many times in AssetCenter.

2 First steps with AssetCenter

This chapter's objective is to familiarize you with the AssetCenter workspace. In particular, we will detail the basic actions that you will perform the first time that you launch this application.

You will thus learn how to:

- Connect to the database using either the Windows client or the Web client.
- Discover the AssetCenter workspace.
- Use, then configure, the different modes of viewing data (list, detail, etc.) that are available to you.
- Enter new data in the database and work with the records.

Start AssetCenter

Windows client

There are two ways to start AssetCenter:

- From your operating system's **Start** menu.
- From the command prompt.

Starting from the Windows Start menu

How you start the program from the **Start** menu varies depending on the program group you selected during installation.

If you used the default values during the installation, you will start AssetCenter by selecting **Start/ Programs/ HP OpenView/ AssetCenter 5.01/ HP OpenView AssetCenter**.

Starting multiple instances of AssetCenter

You can start several instances of the program.

Starting from the command prompt

To start AssetCenter from a DOS command prompt:

1 Open a DOS command prompt, by selecting **Start/ Accessories/ Command prompt**, for example.

2 Go to the `bin` sub-folder of the AssetCenter installation folder. For example, if you chose to install AssetCenter in the default folder, enter the following command:

```
cd C:\Program Files\HP OpenView\AssetCenter 5.01 xx\bin
```

3 Enter the desired command line and then press **Enter** to validate. The following syntax enables you to start AssetCenter:

```
am [-?|h|H] [-cnx:<connection>] [-login:<login>] [-password:<password>] [-
view:<view>] [-config:<configuration>]
```

Parameters:

- *-?, h or H*: displays the help message.
- *-cnx*: database connection name (**Name** field in the **Connection** tab of the connection detail, which is displayed using the **File/ Manage connections** menu item.)
- *-login*: login of the employee connecting to the database (**Login** (UserLogin) field in the **Profile** tab of the employee detail, which is displayed using the **Portfolio/ Departments and employees** menu item.)
- *-password*: password corresponding to the login (**Password** (LoginPassword) field in the **Profile** tab of the employee detail, which is displayed using the **Portfolio/ Departments and employees** menu item.)
- *-view*: SQL name of the view displayed at startup (views available in the **Tools/ Views** menu item.)
- *-config*: modules to activate:
  - Itam: Portfolio
  - Contract: Contracts
  - SAM: Software licenses
  - SWD: Software distribution
  - Finance: Financials
  - Chargeback: Chargeback

- Procurement: Procurement
- Cable: Cable and Circuit
- Barcode: Bar-code inventory
- Admin: Administration
- Reconc: Reconciliation

To activate several modules, separate them by commas.

Example:

```
am -cnx:Database -login:util -password:Password -view:PentiumAssets -confi
g:Itam,Procurement
```

Warning:

- Parameter values may not contain spaces.
- When you activate modules via command lines, the **File/ Activate modules** menu is no longer available.

Web client

1. Start one of the Internet browsers listed in the AssetCenter compatibility matrix.
2. Connect to AssetCenter Web Tier via the URL provided by your company's AssetCenter administrator.

   The format of the URL is as follows:

   ```
   http://<AssetCenter Web Tier server name>:<Port used by AssetCenter Web
   Tier>/AssetCenter
   ```

Connecting to a database

There are two ways to connect to a database: with or without integrated NT security.

Note:

You can only open one database at a time during an AssetCenter session. You can, however, launch multiple instances of the AssetCenter client (Windows or Web) and connect to a different database using a separate instance.

Connecting without using integrated NT security

Windows client

To connect without using integrated NT security:

1 Select **File/ Connect to database**.

2 Select a connection that you have already defined from among the choices in the **Connection** field's drop-down list.

3 Enter your **Login** name (SQL name: UserLogin) as defined by the administrator in the **Employees** table (SQL name: amEmplDept).

You can also connect to the database of your choice by using the **File/ Manage connections** menu. Simply select the connection and click **Open**.

> Note:
>
> If you want to connect as an administrator, enter **Admin** in the Login field.

4 Enter your password in the **Password** field.

The first time that you open a database, you need to use the password assigned to you by your administrator. Once the database is open, you can change your password via the **Tools/ Change password** menu.

5 Click **Open**.

Web client

To connect without using integrated NT security:

1 Enter your **Login** (UserLogin) name that was defined by the administrator in the **Employees** (amEmplDept) table.

> Note:
>
> If you want to connect as an administrator, enter **Admin** in the Login field.

2 Enter your password in the **Password** field.

The first time that you open a database, you need to use the password assigned to you by your administrator. Once the database is open, you can change your password by selecting the **Portfolio management/ Operations/ Change password** link in the navigation bar.

3 Click **Open**.

> **Note:**
>
> The URL that you used to display the connection page (and that points to AssetCenter Web Tier) allows you to automatically determine the database to which you are going to connect.
>
> As opposed to the Windows client, the connection window does not allow you to select the database to connect to nor edit connections to the database.

Connecting using integrated NT security

This feature:

- Requires the AssetCenter administrator to have launched the AssetCenter Server at least once,
- Is available to Windows 2000, XP, or Server 2003 client workstations.
- Is not available to Windows 95, 98 and ME client workstations.
- Assumes that you are connected to the AssetCenter database with the same login as your Windows connection.

> **Tip:**
>
> Using this feature, you do not have to enter values into the **Login** and **Password** fields; AssetCenter automatically uses your Windows login and password.

Windows client

To connect using the integrated NT security:

1 Select **File/ Connect to database**.
2 A window opens in which you need to select an already defined connection from among the choices in the **Connection** field's drop-down list.
3 Select **Use integrated NT security** option.
4 Click **Open**.

Disconnecting from a database

Windows client

Select the **File/ Disconnect from database** menu at any time during your session.

If necessary, AssetCenter will ask you if you want to save the current modifications.

AssetCenter workspace

This section presents the AssetCenter workspace. It is always displayed and contains all the other windows and panes of the application.

Menus

The menu bar

Windows client

All the AssetCenter commands are accessible from the menu bar running across the top of the workspace.

Without a mouse, the menu bar can be activated by pressing the **Alt** key.

> Note:
>
> You can only activate those menus included in your HP license.

Web client

Functionality not available.

Shortcut menu

Windows client

A shortcut menu is a menu in which each menu item applies to the part of the program in which you are working. Right-click to display the shortcut menu and to select an item from it.

Without a mouse, the shortcut menu can be displayed by pressing **Shift** + **F10**, or by pressing the **Menu** key.

Web client

No shortcut menus are available.

Some of them have been replaced by drop-down lists that contain actions, filters and statistics which are valid for a given table.

Toolbar

Windows client

You can access the functions on the toolbar by clicking on any of its icons. Each icon corresponds to an AssetCenter function, and clicking directly on it avoids having to go through the menu bar.

To configure the toolbar, you can use the **Tools/ Customize toolbar** menu item, or you can use the shortcut menu available when you click anywhere in the toolbar zone, except where there are buttons.

Web client

The toolbar is located at the upper right of the AssetCenter workspace.

Place the mouse cursor over an icon to display a ToolTip.

This toolbar cannot be customized.

Status bar

Windows client

A status bar at the bottom of the workspace displays the following information from left to right:

- A description of the selected zone (active fields, highlighted menu items, etc.).
- The name of the open database is the name of the login used to access the database.
- The current operating mode (browse, create, modify).
- The time of day.

Web client

Function not available.

Windows and Web client navigation bar

The navigation bar automatically displays each AssetCenter database component that is associated with a functional domain.

It is structured according to functional domain.

The components that appear are as follows:

- Actions
- Forms
- Reports

- Views
- Screens of the tables

To add, remove or modify the position of a component on the **Functions** tab/ navigation bar:
- Actions, forms, queries, reports and views:
  1. Start the Windows client.
  2. Connect to the database.
  3. Display the detail of the action, form, query, report or view.
  4. Modify the **Domain** (Domain) link.
- Screens of the tables:
  1. Start AssetCenter Database Administrator.
  2. Connect to the database.
  3. Display the table containing the screen.
  4. Display the screens of the table (**View/ Screens** menu).
  5. Populate the **Domain** field with the SQL name of the functional domain to associate with the screen.

Windows client

To display or mask the navigation bar, use the **Window/ Display navigation bar** menu.

Web client

To display or hide the navigation bar, click the ▣ icon on the toolbar.

The following components, which are available in the Windows client, are not yet supported by the Web client and do not appear in the navigation bar
- *Executable*, *DDE*, *Messaging*, *Printing*, *Software distribution*, *Action* and *Dashboard* type actions.
- Forms
- Reports
- Views

Favorites

Windows client

You can display or hide the navigation bar via the **Window/ Display navigation bar** menu item.

The **Favorites** tab enables you to save favorites. You can thus directly access screens, views and other items that you regularly use via this tab. To create a favorite:

1 In the **Functions** tab, select the link that interests you.
2 Right-click.
3 Select **Add to favorites** from the shortcut menu that is displayed.
4 The link is created in the **Favorites** tab.

Web client

To create a favorite in Internet explorer:

1 Display the screen that you want to add to the browser's favorites.
2 Click the 🔖 icon at the upper right of the Web client's workspace.

A link is created to the page and is added to Internet Explorer's favorites.

Display priority

Windows client

The displaying of a screen is subjected to the following priorities:

1 The query wizard, has priority over
2 a view, which has priority over
3 a customized screen, which has priority over
4 a system screen.

For example: When you display the Portfolio Items screen, it is filtered by a query wizard. If you specify a filter condition in the wizard, the screen that is displayed will take your filter into account. To display the unaltered system screen, you must close the prefilitered screen and then reopen it without specifying a query condition.

Web client

Functionality not available.

ToolTips

When the mouse pointer comes to rest over certain areas, in particular over icons on the toolbar, a ToolTip appears to indicate that tool's function.

Windows client

Use the **Edit/ Options/ Display** menu item to enable or disable ToolTips.

Example

In the lists, if you cannot see the entirety of the information in a column because the column is too small, a ToolTip appears showing the text in full.

Web client

No option is used to configure the display of ToolTips.

System information, installed and recognized components

Windows client

The **About AssetCenter** box contains all the system information concerning AssetCenter.

The **Help/ About AssetCenter** menu displays this box.

If an Internet browser is installed on your workstation, you can visit the HP Web site by clicking http://h20229.www2.hp.com/index.html.

When you click **More**, a window appears in which you can see the packages installed and recognized by AssetCenter.

This window contains information about:

- The installed software (version number, description, software name, etc.), grouped under **Software**.
- The client workstation, grouped under **System information**.
- The open database.
- DLLs or executables required by the database engines compatible with AssetCenter:
  - If a dynamic link library is installed, AssetCenter automatically detects it and displays its full path name in the second column. Additional information about the library appears in the third column of the screen displaying installed and recognized components.
  - If no dynamic link library is found, **File not found** is displayed in the second column.
  - If a dynamic link library is found but no additional information is available, AssetCenter displays **Information not available** in the second column.

Click **Copy** to copy this information to the Clipboard. Click **OK** to close the window displaying installed and recognized packages.

Web client

Double-click the banner at the top of the workspace.

Only part of the information that is available in the Windows client is available.

Record lists

How lists work

The AssetCenter database includes a large amount of information. This data is grouped into *tables* (Assets, Contracts, etc.). Each table contains *records* for each item in the table (an asset, a model, a contract, etc.).

To access these records, the program uses *lists* which let you quickly display the records contained in the *tables*. You can access specific information concerning a given record by using these lists.

Using lists

A list is a window that displays all the records of a given table. It enables you to search for records, modify them and display detailed information about one of them in the detail window.

Windows client

To access a list window, click the button on the toolbar, select the command from the menu, or the entry on the navigation bar that corresponds to the desired table.

Note:

Administrators can also display a list in AssetCenter using the **Administration/ List of screens** menu item.

Web client

To access a list window, use the entry in the navigation bar that corresponds to the table on which you want to work.

This entry type starts with the ⊞ icon.

Moving within lists

Windows client

For information about navigating through the records lists: ▶ *Accessibility options* guide, chapter *Mouseless navigation*, section *Record list and detail windows/ Record list*.
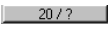
The Loading button

AssetCenter enables you to specify the maximum number of records to be loaded by default in a list. To do this, select the **Do not load more than** option, accessible via the **Edit/ Options** menu.

When you click the ▣ button at the top of the screen, it displays the previous records; the ▣ button at the bottom of the screen displays the next records. The display of these records always respects the maximum number of records to be shown that you specified in the Options screen.

The **Load next/ Upward** and **Load next/ Downward** shortcut menus give the same results.

To load all the preceding or following records, hold the *Shift* key down and then click the ▣ button.

Indication of list loading

The ▭ 20/? ▭ button indicates the number of records loaded compared to the total number of records in the database after filtering.

If a "?" appears in place of the right hand number, click the button to display the total.

Web client

Use the following icons to move through a list:

Icon	Displayed records
|<	First records of the list
<<	Previous records
>|	Last records of the list
>>	Next records

To calculate the total number of records in a table, click the **Update** link at the upper right of the records lists (main lists only).

Action buttons concerning record lists

Desired result	Action to execute in the Windows client	Action to execute in the Web client
Create a new record (display a an empty detail window to describe a new record)	Click **New**. The record is not created until you click the **Create** button.	Click **New**. The record is not created until you click the **Save** button.

Desired result	Action to execute in the Windows client	Action to execute in the Web client
Duplicate the selected record (copy information from the selected record to a new detail window)	Click the **Duplicate** button. The record is not created until you click the **Create** button.	Not available for lists. You need to display the record's detail first.
Delete selected record permanently	Click the **Delete** button.	Trigger the *Delete* contextual action
Display a record's detail	Click the record and click the **Detail** button.	Click the text of one of the columns for the line that corresponds to the record
Calculate the sums of the numerical values for each column in the main list	Click the ▦ icon.	Not available
Close the list window	Click **Close** button	Not available

Hierarchical organization

Certain tables in AssetCenter are organized hierarchically: Each record can have a sub-record. AssetCenter does not limit the number of levels that can exist in the such tree structures.

Examples:

- In the Locations table, a given location A may be a **sub-location** of a given location B.
- In the Assets table, an asset may be a **component** of another asset.
- In the Departments and Employees table, the "Sales head office" department has a sub-department called "Sales". "Sales head office" is the "parent" or "parent department" of "Sales". This creates a hierarchy as shown below:

Windows client

View type

Records in hierarchic tables (such as Models, Locations, Departments and Employees, etc.) can be viewed either in "table view" (as a list) or in "tree view".

Figure 2.1. Departments and employees table - Tree view
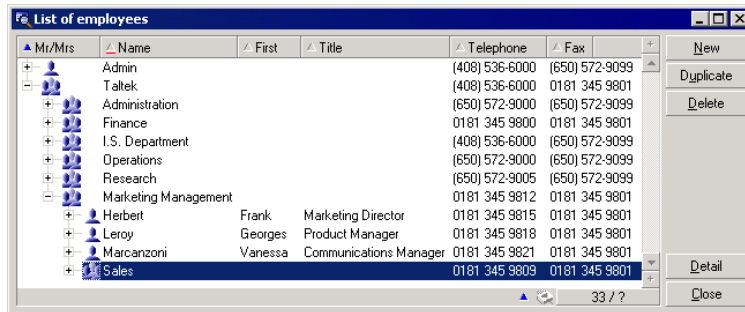
The view type is selected as follows:

- Using the **Window/ Tree view** and **Window/ Table view** menu items for main lists.

- Using the shortcut menu (right-click in the list) to select either **Tree view** and **Table view** for main lists or tab lists.

When you are in "tree view", you can expand a level by using the ⊞ button in the tree, or collapse a level with the ⊟ button.

In tree view, you access the **Unfold** option by right-clicking in the list. This option lets you define how many hierarchical levels you want to see displayed in the tree structure: one, two, three or all. If you close the window, you will loose this configuration.

Below is a list of keys and shortcuts available from the keyboard that control views:

- List view: CTRL+L

- Tree view: CTRL+T

The navigation mode for tree lists can be changed by selecting the **Lists/ Arrow keys used to open/close nodes in tree structures** option (**Edit/ Options** menu).

You thus obtain the following behavior:

Intended action	Corresponding manipulations
Unfold a tree node	Keyboard:
	■ **Right arrow**
	■ **+** on the keypad

Intended action	Corresponding manipulations
Fold a tree node	Keyboard:
	▪ **Left arrow**
	▪ **-** on the keypad
Select the parent	Keyboard: **Left arrow**
Select the next visible record	Keyboard: **Down arrow**
Select the previous visible record	Keyboard: **Up arrow**
Select the next column	Keyboard: **Shift** + **Right arrow**
Select the previous column	Keyboard: **Shift** + **Down arrow**

Important:

In order to access the tree-view of a table, the user must have the rights to read the **Full name** (SQL name: FullName) and **Hierarchic level** (SQL name: sLvl) fields.

Modifying the hierarchical organization of a table

1 Open a hierarchical table.
2 Display the list in tree view using the **Window/ Tree view** menu item.
3 You can display the table as a simple list using the **Window/ List only** menu item if this makes it easier to read.
4 Unfold the tree until you reach the desired record:
   ▪ Either by clicking a node in the hierarchy.
   ▪ Or by using the **Unfold** command in the shortcut menu.
5 Click the record at the base of the branch to be moved and hold down the mouse key.
6 Then drag the branch with the record to the base of the destination branch.
7 All the sub-items that you moved keep their hierarchical order.

Or:

1 Display the hierarchical list in "List and details" mode (**Window/ List and detail** menu item.)
2 Select all the records with the same parent.
3 Modify the field corresponding to the parent record: Select the new parent.
4 Click **Modify**.

Web client

Functionality not available.

Regrouping records: Virtual hierarchy

The hierarchic view is only available for hierarchic tables. You can however, group records together according to the field. Doing so creates a virtual hierarchy.

Note:

Grouping is available for both hierarchic and non-hierarchic tables.

This functionality is useful as it makes viewing and searching more comfortable.

For example, the Assets table (amAsset) can only be viewed in a flat mode. By creating a virtual hierarchy you can make a quicker selection of an asset and its sub-assets when filling a work order.

Windows client

Creating a virtual hierarchy

You also have the ability to group records in the field by a field or link, thus creating a virtual hierarchy.

Grouping from the detail of a record

To regroup your records according to a field or link:

1 Open the screen of your choice.

   Make sure the screen is in list and detail mode.

2 Right-click this field or link, and then select **Group by this field** from the shortcut menu.

   The list is reorganized according to the elements contained in the selected field and the 🔳 and 🔳 buttons are activated. The elements that define the hierarchy are shown in gray.

For example:

1 Display the list of natures (**Portfolio/ Natures** menu).

2 Right-click the **Create** field in the **General** tab of the screen,

3 Select **Group by this field**.

   The flat list become hierarchic.

Grouping from the list configuration

Note:

This method is particularly helpful when the field or link used for the grouping is not available in the detail screen.

To group your records from the configuration of a list:

1 Open the screen of your choice.
2 Right-click the list and select **Utilities/ Configure list** from the shortcut menu.
3 In the **Group by** field, select the field or link that is the criteria for the grouping.

For example, to view the assets according to their model in the Assets and Batches screen:

1 Open the Assets and Batches screen.
2 Right-click the list and select **Utilities/ Configure list** from the shortcut menu.
3 In the **Group by** field, select the Models (**amPortfolioItem.Model**) link

Cancelling a virtual hierarchy

To cancel a virtual hierarchy:

1 Right-click the list that was modified by a grouping.
2 From the shortcut menu, select **Ungroup all**.

Grouping on a hierarchical table

The special relationship that exists between some tables (for example between the Assets and the Portfolio tables) allows a hierarchical table to benefit from the hierarchy of another hierarchical table.

For example, to use the hierarchy of the Portfolio table in the Assets and batches table, group by the **Portfolio.Parent** link. The assets and batches list shows for each asset its component sub-assets.

Note:

In this particular case, the list does not show the element used for the hierarchy in grey.

Web client

Functionality not available.

List display parameters

Windows client

AssetCenter has numerous parameters that govern the way in which record lists are displayed:

- View type: "Tree view" or "List view"

- Display mode: "Details only", "List only" or "List and details"
- List sorts using the column header buttons.
- List configuration (shortcut menu item **Utilities/ Configure list**):
    - Selection of fields to display by column
    - Sorts
    - Filters
    - Grouping
- Application of filters
- Window size

A window's parameters are memorized each time you close it. If you want to revert back to a list's default settings, you need to press **Shift** when you display a list or the corresponding icon on the tool bar.

Web client

AssetCenter has numerous parameters that govern the way in which record lists are displayed:

- List sorting
- Application of filters

    You only have access to simple filters (filter on a field or link).

    Filters can be selected from the **Filter** drop-down list that is located above the lists.

    This drop-down list contains all fields and links present in the table indexes

    If an administrator adds a field or a link to one of the table's indexes using AssetCenter Database Administrator, then this new field or link appears in the list of filters.

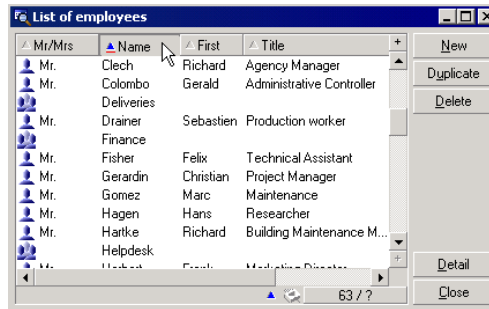Window parameters are not stored when they are closed.

List layout

Quickly sorting a list

Windows client

There is a button at the top of each column in the list that bears the name of a field. This button enables you to alphabetically sort the values of this field for each record in the corresponding table.

Figure 2.2. Employees table - list sorting tools

Click ▲ in order to sort a column's values in ascending order. If you double-click ▲, it will sort the column's values in descending order (inverse). If you simultaneously press Shift while doing this, the values will be directly sorted in descending order.

Click this button to switch between ascending and descending sorts (▲ and ▼).

The red bar ▲ indicates that the field is indexed and therefore will sort more quickly.

Web client

The main lists can be sorted but not the secondary lists (lists under the tabs).

In order to sort a column, a field or link corresponding to the column must:

- Be part of the table to which the screen belongs.
- Be either the unique field or link of an index of the table to which the screen belongs.

To sort a list for a given column, click the column's name.

The sort order changes each time you click:

1 Not sorted
2 Ascending
3 Descending
4 Ascending
5 Descending

It is not possible to return to the *Not sorted* status in the Web client.

Quickly adding a column to a list

Windows client

You can add a column to a list from a detail screen. Right-click an object (field or link) and then select the entry **Add this column to the list** from the shortcut menu. The values of the object now appear in a column.

Web client

Functionality not available.

> 💡 Tip:
>
> The columns that are displayed in a list correspond to the fields and links that are defined for the screen via AssetCenter Database Administrator (**Columns in the list** field).

Removing quickly a column from a list

Windows client

You can quickly remove a column from a list. Right-click a value in the column (field or link) and then select **Utilities/ Remove this column** from the shortcut menu.

Web client

Functionality not available.

Adjusting the size of columns in main lists

Windows client

Press F9 to obtain maximum column size when the list is active, depending on the size available for display.

Pressing CTRL+F9 will optimize the size of these same columns so that their values appear in their entirely. If you double-click the top-right border of a column header, AssetCenter automatically adjusts the column size for this column only.

Web client

Functionality not available.

Using the **Utilities/ Configure list** shortcut menu item

> ⚠ Warning:
>
> This functionality is only available for the Windows client.

List on the left

The **Columns and sort** tab contains an hierarchic list of all the elements in the current table that you can display in the main list. The following icons are used to identify the different items:

- ▦ designates a field.
- ▦ designates an indexed field.
- ▦ designates a monetary value.
- ▦ and ▫ designate a link.
- ▦ designates a feature.
- ƒ⁽ˣ⁾ designates a calculated field.
- ▦ designates a key.
- ▦ designates a link to a comment.
- ▲ designates a link to an image.

You can also double-click on an element in the left-hand window to transfer it to the right-hand window. The corresponding columns will be added to the main list once you click **OK**. To remove an element, go through this process starting from the right-hand window and moving an element to the left.

The field above the list enables you to enter an element from the database dictionary by typing its SQL name. AssetCenter automatically types ahead for you.

List on the right

This list contains the items selected for sorting or display.

Sort column

Clicking on a column header activates the sort of the values contained in that column. Click once and the triangle points upward, meaning that the sort is ascending; click twice and the triangle points downward, meaning that the sort is descending. A third click disables the sort.

> 🖉 Note:
>
> Sorts can be applied directly from the list by clicking the column header. You can hold down the SHIFT key while clicking the column header to select a descending sort directly.

Visibility column

Clearing a checkbox enables you to hide the corresponding column in the list.

For example, you can perform a sort on the asset tag without having it displayed on screen or printed.

Title column

This column allows you to replace the default description of the column headers.

Color column

This column allows you to select the calculated field that defines the color used to display records in the list.

Several types of fields can be used: A field in the table, a calculated field, a feature, etc.

The colors are expressed in RGB format. If you do not know the RGB values of the colors, you can use the **AmRgbColor()** Basic function, which returns the correct value for the color you want to use.

For example:

You want to display the contracts coming to end of term within the next 3 months.

To do this:

1 Create a calculated field (**Administration/ Calculated fields** menu item) with the following parameters:

Table 2.1. Calculated field - color of the column

Field	Value
Table (TableName)	**Contracts** (SQL name: amContract)
Field type (seType)	**Basic script**
Result type (seDataType)	**Numerical**

Calculation script (mem-Script)	```If AmDateDiff([dEnd],AmDate()) < 7776000. Then
	RetVal = AmRgbColor("RED")
	Else
	RetVal = AmRgbColor("BLACK")
	End If```

2 Use the **Contracts/ Contracts** menu item to display the list of contracts.

3 Configure the list using the **Utilities/ Configure list** command from the shortcut menu.

4 Add the calculated field that you have just created in the list of columns displayed.

5   Check the **Color** column for this field.

6   Confirm this configuration by clicking **OK**.

7   Test this configuration by comparing a contract whose **End** field (dEnd) has a value falling within the 3 months following the current date, with another beyond the 3 month limit.

Type column

This column is only used for informational purposes and indicates the type of the field: text, number, date, etc.

Sort by index column

The **Sort by index** field allows you to select an index as a sort key rather than selecting sort keys by checking the boxes in **Sort** column of the list above.

If you select an index for the sort, the necessary columns are added and the index replaces any sort keys selected in the table. Certain indexes concern several columns.

Sorting on an index makes sorts faster.

Options at the bottom

Force indexes option

Select this option so that queries sent to the database specify the index to use.

This increases the likelihood of the database engine correctly using the index, but does not guarantee it.

View NULLs option

When you select this option and you sort a list on a non-numeric field, records for which this field is set to NULL are displayed.

When this option is not selected, records for which the sort field is set to NULL are masked.

Drop-down list layout

Windows client

Drop-down lists can be displayed in a detail in any of the following ways:

- By clicking ▾ to the right of a field
- By pressing the **Alt** + **Down arrow** key combination

The drop-down list of a hierarchical list can appear in tree form if you select **Yes** in the **Trees in drop-down lists** option, accessible via the **Edit/ Options/Navigation** menu.

- When it is displayed as a list, the sort order depends on what has been specified for the table to which the drop-down list points. This is configured via the **String** field in AssetCenter Database Administrator.
- When it is displayed in tree form, the records are sorted alphabetically according to **Full name**.

Web client

Click ▾ to the right of a field to display a drop-down list in a detail.

Viewing statistics

AssetCenter offers you the possibility to graphically view statistics on a link or field.

Windows client

To view statistics:

1 Move your cursor either to a column in the list, or to a field or link in the detail.
2 Right-click.
3 Select the following shortcut menu: **Utilities/ Statistics on this column** if you have clicked a column, **Statistics on this field** if you have clicked a field, or **Statistics on this link** if you have clicked a field or a link.
4 AssetCenter displays the statistics in a new window.
5 If you double-click on one of the columns in the graphic, AssetCenter will open a new window enabling you to filter the corresponding records.

📝 Note:

The statistics are limited to the first ten values found by AssetCenter. All other values are grouped in the **Other values** category.

Presentation of statistics

You can choose between several different types of graphical representation.

To modify the graphic's appearance, right-click on the graphic and choose:

- Among the available graphics:
  - Vertical bars
  - Horizontal bars

- Lines
- Pie chart
- Among the available views:
  - 3D view
  - Stacked view

You can also display the graphic's key, which corresponds to the colors in the pie chart view, or a marbled background.

1 Display the list.
2 Select the statistic from the **Stat.** list.

The list displays an entry by:
- Table index, except if the index is on the primary key
- Statistic whose context is on the table

Searching for a record in a list

Windows client

If you sort by the field containing the value you want to find, and you click on the corresponding column, you can then search for any record having that value:

1 Right-click anywhere in the list area: A shortcut menu is displayed.
2 Click the **Go to** command and type the first few letters of the value to find. AssetCenter automatically completes the rest of the information, displaying the closest existing value in the database.
3 When the correct value is displayed click the **Go to** button. AssetCenter positions the cursor on the item in the list whose value is greater than or equal to the value entered via the keyboard.

Note:

The keyboard shortcut equivalent to the **Go to** command is Ctrl+G.

Other ways to search records

- Filters: These allow you to display a subset of a list according to the criteria you define.
- Views: These combine filters with parameters for presenting a list.

Web client

Select a filter from the **Filter** drop-down list that is located above the lists.

Manipulating records in a list

Selecting one or more records in a list

Windows client

Selected records are displayed as being highlighted in the list. The first record is selected by default. You can select another record by moving the cursor with the arrow keys or clicking the item itself. You can select several items by using the CTRL or SHIFT key with the mouse.

Web client

Select the check box to the left of the desired records.

Selecting all the records in a list

Windows client

Once the list is open, use the **Edit/ Select all** menu item to select all the records in the list (keyboard shortcut: **Ctrl** + **A**).

Web client

Select the check box to the left of the column names.

Moving a record in a tree view list

Windows client

In a tree list you can move a record from one point in the tree to another by simply "dragging and dropping" it with the mouse. Click the item and, while still pressing on the mouse button, move the cursor to the new position and release the mouse button.

For example, this has the same effect as modifying the **Sub-location** (SubLocations) field of a location or **Component of** (Parent) field of an asset.

Web client

Functionality not available.

Adding objects to a floor plan

Windows client

When you define a floor plan (**Portfolio/ Floor plans**) you can add records (assets, employees, etc.) from other lists directly onto the floor plan by dragging and dropping the records.

You can drag any element directly onto the floor plan, or you can drag its corresponding icon if available, which appears in the detail screen.

Move the records around the floor plan using the mouse.

For more information on creating floorplans, refer to the *Core tables* guide, chapter *Floor-plans*.

Web client

Functionality not available.

Exporting a list

Windows client

AssetCenter exports the list that you have selected, after any possible filters, exactly as it appears on the screen.

First, identify and select the list that you want to export: the main list or a list in the detail screen (for example, you want to export the list of contracts linked to an asset, visible in the **Contracts** tab of the asset detail). The list used for the export is the one used when the operation is launched.

To export a main list or a list in a detail, select **Utilities/ Export list** from the shortcut menu.

1 Enter the name, extension and path of the text file where the exported data is stored into the **File** field of the dialog box.

- If you choose to export data to a text file, select the **File** option and then click the ⊡ button to choose the destination, name and extension of the text file resulting from the export.

- If you choose to export data to a Microsoft Excel spreadsheet, select the **Microsoft Excel** option. During the export, AssetCenter automatically starts Microsoft Excel and displays the exported data in a new worksheet.

  🔧 Important:

  Microsoft Excel must be installed on your system. AssetCenter does not directly export data to an `.xls` file (Microsoft Excel files).

2 Select the data export options:

- Select the **Export name of the table** option so that the table's name will appear at the head of the exported text file or in the first line of the Microsoft Excel table.

- Select the **Export column headers** option so that the column names will appear at the head of the exported text file or in the header of the Microsoft Excel table's columns.
- Select the **Export the identification numbers** option to export the ID numbers along with the records. In other words, you will be exporting the table's **ID** field (for example, the **lAstId** in the Assets and batches table).
- For an export to a text **File** only, select **Separator** in the drop-down list. The character will separate each field in the exported main list.

3 Click **Export**.

Web client

You can copy the visible contents of the list to the clipboard.

Record details

This section explains how to access record details in AssetCenter and view the information contained there.

The record's detail contains the full set of information that is related to this record. This information is divided into tabs organized by subject matter.

Information is displayed within each tab as fields, links or lists. You can add as many items as you want to a list. This is the case with the asset features for example.

Accessing a record detail

Windows client

To display a record's detail
1 Display the list of records of the table in which the desired record is stored.
2 Do one of the following actions:
   - Double-click the record
   - Select the record from the list and click the **Detail** button

Web client

To display a record's detail
1 Display the list of records of the table in which the desired record is stored.
2 Have the record appear in the list (for example, search for the record using a filter).
3 Click the text that describes the record.

Combined list and detail view

Windows client

AssetCenter lets you display a list only, a detail only, or both a list and the detail of the selected element together.

Use the **Window/ List only**, **Window/ Detail only** or **Window/ List and detail** menu items to select the display mode.

Figure 2.3. Combined display of the list of assets and of a detail
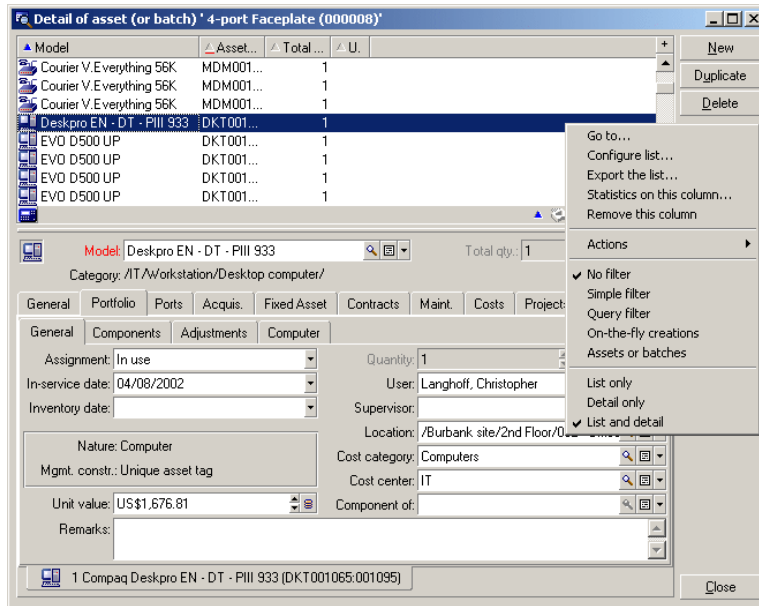
The following keyboard shortcuts are assigned to these modes:

- List only: *F6*
- Detail only: *F7*
- List+Detail: *F8*

✎ Note:

In "List+Detail" mode, you can display the list in horizontal mode (the list is displayed above the detail screen) or vertical mode (the list is displayed to the left of the detail screen). To switch between these two modes, right-click on the screen (except on the list and the detail part) and select the **Switch to horizontal mode** or **Switch to vertical mode** shortcut menu as needed, or double-click the split bar of the list or the detail.

Web client

Functionality not available.

Resizing windows

Windows client

AssetCenter enables you to adjust the windows to a non-maximal size.

Move the mouse pointer to the border or corner of a window until the cursor changes its appearance. Then click and drag the selected border or corner to resize the window.

To change the size of the list and detail areas (to move the line that separates the two areas):

1 Move the cursor to the line separating the list area from the detail area until the pointer changes shape.
2 Click the mouse and, while holding down the mouse button, move the pointer to the desired position.
3 Then release the mouse button.

Without a mouse, you can display the resizing menu by pressing the **Alt** then **Left arrow** and **Down arrow** keys successively after selecting any component in a window.

Web client

Functionality not available.

Buttons in a record detail

Desired result	Action to execute in the Windows client	Action to execute in the Web client
Save the changes made to the detail window	**Modify**	**Save**
Save the information in the detail window as a new record	**Create**	**Save**
Save the information in the detail window as a new record and start creating a new record using the current information This action is useful when you create a set of records that have similar information	Create ⟳ The new record is not created until you click Create ⟳ or the **Create** button to finish the creation process.	Not available
Duplicate the record	**Duplicate**	**Duplicate**
When you are creating a record, clicking this button will cancel the creation of that record.	**Cancel**	**Cancel**

Desired result	Action to execute in the Windows client	Action to execute in the Web client
When you are modifying a record, clicking this button will cancel the modifications and revert to the original	**Cancel**	**Cancel**
Delete the record	Not available	**Delete**
Display a linked record's detail	🔍	Click the description of the linked item
Populate a link by selecting a record from a selection window	🔲 This button is displayed by the **Selection windows** navigation option which can be accessed via the **Edit/Options** menu (expand the "Navigation", then "Selection of linked records" nodes on the tree view). The list that is displayed is the standard list for linked records. The title of the list that is displayed depends on the context in which it is displayed. For example, if the user of the asset 'bbb' is selected, the list of departments and employees is displayed but the title of the window is "User of portfolio item 'bbb'" (which is more precise in this context), and not the "List of employees".	🔲
Populate a link by selecting a record from a drop-down list	▾ Even though it allows you to select a linked record, the drop-down list opens for a single column and provides values for this same type. This behavior differs from the 🔲 button which displays the standard, main list.	Not available
Populate a field by selecting a value from an itemized list	▾	▾
Detach a linked record	Delete the contents of the link edit zone	🖉
Displays the tab list to the left	◀	Not available
Displays the tab list to the right	▶	Not available
Add a record to a detail list. For example: The list of contracts assigned to an asset. This list is found in the **Contracts** tab of the asset's detail.	➕	**Add**

Desired result	Action to execute in the Windows client	Action to execute in the Web client
Delete a record from a detail list	▬	**Delete**
Add an alarm to the field to the left of the button	🐸	Not available

Tabs

AssetCenter displays database record information in a zone called a "detail".

Certain tabs show a list of linked records, for example: The **Assets** tab in the detail of a contract contains the assets covered by the contract (**Assets covered by contracts** link (AstCntrDescs).

Windows client

The records under tabs can be displayed in different ways:
- In tab form
- In list form
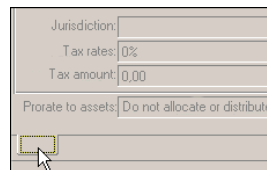
To change the form of the tab:

Intended action (followed by the context)	Corresponding manipulations
Display the list in the form of tabs (not recommended when using the mouse) (List zone)	Shortcut menu: **Display in tab-form**
Display the list in table form (recommended for ease of use with the mouse) (List zone)	Shortcut menu: **Display in list-form**

To manipulate the records in the tab when they are displayed in table format, use the buttons the right of the list, the shortcut menu, or the general menu.

To manipulate the records in the tab when they are displayed in the form of tabs, start by selecting the identifier of the tab, then use the shortcut menu or the general menu.

You can perform the following manipulations:
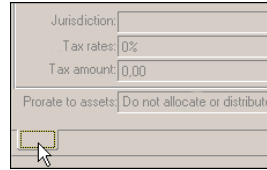
Intended action (followed by the context)	Corresponding manipulations	Available in list form	Available in tab form
Add a link (List zone)	Shortcut menu: **Add a link**	Yes	Yes
Duplicate a link (List zone)	Shortcut menu: **Duplicate linked record**	No	Yes
Delete a link (List zone)	Shortcut menu: **Delete link**	Yes	Yes
View the detail of a link (List zone)	Shortcut menu: **Show detail of link**	Yes	No
Copy links (List zone)	**Control** + **C** key combination	Yes	No
	Edit/ Copy menu	Yes	No
Cut links (List zone)	Keyboard: 1 **Control** + **X** key combination 2 **Modify** button	Yes	No
	General menu: 1 **Edit/ Cut** menu 2 **Modify** button	Yes	No
Paste links (List zone)	Keyboard: 1 **Control** + **V** key combination 2 **Modify** button	Yes	No
	General menu: 1 **Edit/ Paste** menu 2 **Modify** button	Yes	No
Delete links (List zone)	Keyboard: 1 **Delete** key 2 **Modify** button	Yes	No
	General menu: 1 **Edit/ Delete** menu 2 **Modify** button	Yes	No

The name of the tab describing the linked record is defined by one of the fields in the tab.

A tab is grayed out none of these multiple links has been created:

Adding the first link automatically activates the tab. To add this first link:

1 Select the unnamed tab.

2 Right-click.
3 Select **Add link** in the shortcut menu.
4 Enter the values of this link.
5 Click **Modify**.

Web client

Records under tabs are displayed as lists.

To perform an action on a record in the tab list, use the **Add** and **Delete** buttons directly under the list (do not confuse these buttons with the buttons that perform an action on the main record).

Navigating in the record detail

For information about navigating through a record's detail: ▶ *Accessibility options* guide, chapter *Mouseless navigation*, section *Record list and detail windows/ Record detail*.

Operations on records

This section explains how to create and modify records in AssetCenter.

General options

Windows client

You can define a delay, after which a window is displayed allowing you to cancel the current operation. This delay, expressed in milliseconds, is specified in the **Show wait message after** option of the application options (**Edit/ Options/ Edit.** menu).

No general options exist.

Creating a new record

Windows client

To create a new record, first display the desired table (for example, the departments and employees table which can be accessed via the **Portfolio/ Departments and employees** menu).

AssetCenter lets you create a record by clicking the **New** button (keyboard shortcut: **Insert** key).

Note:

When you click **New** to create a new record, the detail displayed is empty, except for the fields or links for which a default value has been defined.

Fill in the information concerning the item being created.

- When you enter the first letters of a value recorded in a drop-down list, AssetCenter automatically fills in the rest. If the value that you are entering does not yet exist, AssetCenter will ask if you want to create a new record in the linked table. You then have two choices:
  - **Create on the fly**: AssetCenter creates a new record in the linked table, but does not display its detail. You can fill in the rest of the information later.

    This option can be disabled via the **Options/ Authorize creations on the fly** menu.
  - **Detailed creation**: AssetCenter displays a detail window for this new record. You can enter the information concerning this new record immediately.
- When first creating a record, AssetCenter uses the default value, when it exists, to automatically populate fields or links. If the default value refers to other fields (model for an asset, for example) in the detail of the item being created, the program waits until those fields have been populated before displaying the corresponding part of the default value. The formulas that define these fields are only applied when the record is first created; they are not used when you modify a record.

The AssetCenter window displays several fields. You are not required to fill in all the fields. Only the mandatory fields in red must be filled in. Other fields are optional. The administrator can easily define which fields are mandatory, via the **Configure object** shortcut menu item or via AssetCenter Database Administrator.

Figure 2.4. Creating a record
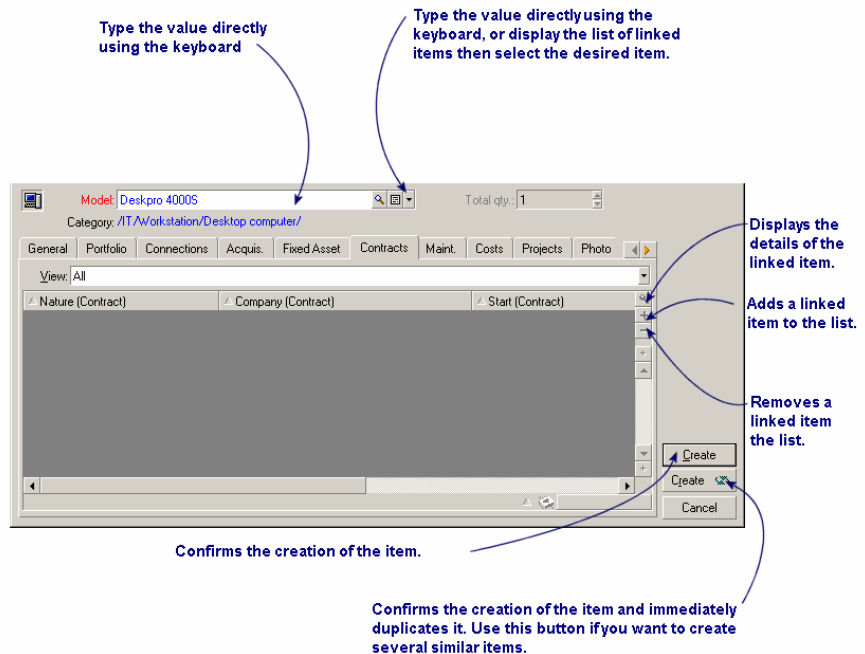
Web client

To create a new record:

1 Display the list of records for the desired table.

For example: Click the **Organization/ Employees** link on the navigation bar.

2 Click **New**.

3 Populate the detail of the record.
4 Click the **Save** button.

Modifying a record

You can modify information concerning a database record using its detail.

Windows client

(The information cannot be modified directly in the list.) The detail contains two types of information:

- Direct information, which can be modified by simply typing in the field.
- Linked information, which can be modified:
  - By selecting another value in the list either using the ▢ icon (for a drop-down menu) or using a ▣ icon (selection window) to the right of the field.

    By typing another value in the field.
  - By using the ▨ button to the right of the field to display the details of the linked item. This lets you modify information concerning the linked item (for example, changing a supplier's telephone number).

When you modify a value in a field, the new value appears in another color. AssetCenter displays a **Modify** button to confirm the new values and a **Cancel** button to cancel these modifications.

Web client

(The information cannot be modified directly in the list.) The detail contains two types of information:
- Direct information, which can be modified by simply typing in the field.
- Linked information, which can be modified:
  - By selecting a record from another table using the ▣ icon to the right of the link.
  - By clicking the description to display the detail of the linked item. Do this to modify the linked item's information (for example, to change a supplier's telephone number).

The **Save** button is used to validate new values and the **Cancel** button cancels the changes.

Modifying a selection of records

Windows client

It is possible to modify a value for a selection of several records simultaneously. You can only modify the same values for all selected records.

Display the list in *List and details* mode and simultaneously select the records to be modified in the list.

AssetCenter then displays in the details window:
- The fields that contain the same values: White background.
- The fields that contain different values: Gray background.

The detail enables you to modify the fields on a white background.

Web client

Functionality not available.

Refreshing multi-user modifications

Because AssetCenter allows several users to access a database at the same time, it is important to understand what happens when two users edit and modify the same record at the same time.

While one user of AssetCenter is working, other users may have modified information, added or deleted records. The modifications appear automatically when you open the screen.

But if you open a list or a detail window that has been modified by someone else, these modifications will only appear in your version after having pressed "F5" (Windows client), or by selecting the **Window/ Refresh** menu item (Windows client), or by clicking the 🌐 icon (Web client).

By applying a filter or a sort, or by going from one type of view to another (tree or list), you will automatically update the information in your window. Displaying a detail from another record also performs the same function.

AssetCenter applies the following rules:

- Several users can edit the same record with no restrictions and without receiving a message.
- When a user clicks the **Modify** button (Windows client) or the **Save** button (Web client), the program looks at each field individually and compares the value on the screen to the value stored in the database.
  - If the value in the database is the same as the value on the screen, nothing happens.
  - If the value on the screen is different from the value in the database, then the value on the screen is saved in the database.
- If two users modify the same field on the same record, a warning message is given to the user who is last to confirm the modification.
  - Windows client: The change is stored in the database by the last user to click the **Modify** button.
- Technically, here is what happens when you click **Modify**: The record is locked for a fraction of a second to give the program time to write the

information in the database. While the record is locked, no other user can write to the record. Other users may read the record, however.

- If a user edits a record and the record is deleted by another user in the meantime, the user who is editing the record receives an error message when they click the **Modify** button.
- Counters are incremented each time a user clicks the **New** or **Duplicate** button. If the user cancels and no other user has clicked the **New** button, the counter restores its previous value. If another user clicks **New** after the first user, the counter is not decremented when the first user cancels (discontinuities will occur).

Windows client

For certain tables, updating is processed specifically.

There are options that enable you to define the caches that will be refreshed either when another connection to the database is made or when you select the **Tools/ Refresh caches** menu item (*CTRL+F5* keyboard shortcut). These caches are different from the connection caches in the connection edit screen.

Web client

No specific option.

Duplicating a record

Windows client

There are two ways to duplicate a record:

Duplicating a record from the **Duplicate** button

To duplicate a record:
1 Select it from the list.
2 Click the **Duplicate** button: AssetCenter creates a new record and copies some of the information.
3 Now you can modify and complete the details of the duplicated record before confirming the creation with the **Create** or Create button. Clicking the Create button is equivalent to successively clicking the **Create** button followed by the **Duplicate** button.

Duplicating a record with the **Edit/ Duplicate** menu

To duplicate a record:
1 Select it from the list.

2 Select **Edit/ Duplicate**.

3 In the window that appears, set the number of copies you want to create.

4 Click the **Duplicate** button to add the copy of these records into the database.

Using **Edit/ Duplicate** is equivalent to clicking the **Duplicate** button then the **Create** button for each copy you require.

⚙ Important:

Before selecting the **Edit/ Duplicate** menu item, you need to define the default values for the mandatory fields and the unique default values for the "non-duplicable" indexes. AssetCenter will inform you that it cannot duplicate a record that must have unique values. It is important to reapply the default value of a field when you use it as a counter.

The **Reapply default value in case of duplication** property is defined with AssetCenter Database Administrator in the **Script** tab.

- If not selected: Copy the source value.
- If selected: Apply the default value (RetVal="default value") in the **Default** zone.

Web client

To duplicate an existing record:

1 Display the list of records for the desired table.

  For example: Click the **Organization/ Employees** link on the navigation bar.

2 Display a detail of the record to duplicate.

3 Click the **Duplicate** button.

4 Populate the detail of the record.

5 Click the **Save** button.

Deleting records

⚠ Warning:

Before deleting a record, you should consider the ramifications of this deletion, since it is not reversible. Does the record concern an erroneous creation in the database? Does it represent an item that has disappeared from the portfolio? And so on. Sometimes it is better to change the status of an item or move it to another location in the database rather than deleting it.

Windows client

Once you have selected the records to be deleted, click the **Delete** button (keyboard shortcut: **Delete** key) to remove them from the list. If these records are linked any record in another list, the system displays an error message. If not, AssetCenter will delete them.

> Note:
>
> You can delete linked records by activating the option **Authorize extended deletions** via the **Edit/ Options** menu.

Web client

To delete records, proceed using one of the following methods:

- 1 Display the list of records to delete.
  2 Select the records to delete.

     You can select them from several pages.
  3 Select the *Delete* contextual action.
  4 Confirm the deletion (**Yes** button).

- 1 Display the list of records to delete.
  2 Display the detail of the record to delete.
  3 Click the *Delete* button.
  4 Confirm the deletion (**Yes** button).

If the records to delete are not linked to any other records from another list that prevent deletion, AssetCenter can delete them. Otherwise, an error message will appear.

Editing data

Assigning values by default

Windows client

AssetCenter enables you to assign certain fields default values, but only when creating a record.

Your AssetCenter administrator selects the fields to which this applies:

- Either by using AssetCenter Database Administrator.

- Or by moving to the field to be configured and using the **Configure object** menu item in the shortcut menu (keyboard shortcut: **Alt** + **Enter**). In this case, modifications are stored in the database:
  - Either when a positive reply is given to the confirmation message that appears when disconnecting from the database.
  - Or by selecting the **Tools/ Administration/ Save database configuration** menu item.

The default value can then be created from a formula using fields, variables, constants, etc.

Note:

For more information on the default values, see the section **Customizing a field, a link or an index** of the *Tailoring* guide.

Special case of calculated fields

Calculated fields can be used in the calculation of the default value of a standard field only if they are *Calculated string* and *Basic script* type calculated fields.

Special case of links to the Comments table

It is not possible to assign default values to links that point to the **Comments** table (amComment).

Special case of linked records

When you create a new record in a table, you often need to select records in linked tables to populate certain fields in the new record.

Important:

If you modify the values of fields in the linked record after creating the new record, the values of fields in the new record are not modified.

If you modify a linked record in the detail of a new record after clicking the **Create** button, the default value formulas of fields are not recalculated.

The administrator can assign default values, calculated using information from linked records, to fields that are directly in the table.

These default values are automatically calculated as soon as you populate and leave the linked field used in a formula.

Note:

Many tasks are carried out automatically by AssetCenter Server. These tasks often have priority over the default values of fields.

Web client

No default values can be defined via the Web client.

However, default values defined via the Windows client or AssetCenter Database Administrator will be applied to the Web client.

Cut

Windows client

Cutting text

To cut text and place it in the Clipboard, select the text to be cut and use the **Edit/ Cut** command.

📝 Note:

The CTRL+X keyboard shortcut is assigned to this command.

Cutting in detail lists

A detail list is one that appears in certain tabs of a detail (for example: the list of assets in a contract, the list of assets at a location, etc.)

To cut records in a detail list and place them in the Clipboard:
1 Select the records to be cut.
2 Use the **Edit/ Cut** command.
3 Click **Modify** to record the operation.

⚠ Warning:

Sometimes, only the link to a target record is deleted, whereas the target record is left intact. (Example: The contracts appearing in the **Contracts** tab of asset details.) Sometimes, the record itself is deleted. (Example: Expense lines in the **Costs** tab of asset details.)

The records can be recovered from the Clipboard using the **Edit/ Paste** command.

📝 Note:

The **Edit/ Cut** command does not apply to records in a main list or to images.

Web client

Use the cut commands of your OS or browser.

Copy

Windows client

Copying text

To copy text to the Clipboard, select the text then use the **Edit/ Copy** command.

Note:

The CTRL+C keyboard shortcut is assigned to this command.

Copying records in a list

To copy records from a main list or a detail list, select the records then use the **Edit/ Copy** command.

The order of the columns is respected when copied.

Note:

The **Edit/ Copy** command does not apply to images.

Web client

Use the copy commands of your OS or browser.

Paste

Windows client

Note:

The **Edit/ Cut** command does not apply to records in a main list or to images.

Pasting text

To paste text from the Clipboard, use the **Edit/ Paste** command. The text is pasted where indicated by the cursor.

Note:

The CTRL+V keyboard shortcut is assigned to this command.

Pasting in detail lists

A detail list is one that appears in certain tabs of a detail (for example: the list of assets in a contract, the list of assets at a location, etc.)

To paste the contents of the Clipboard in a detail list, use the **Edit/ Paste** command then click **Modify** to record the operation.

Precautions before pasting in a detail list

- The user cannot choose the mappings between the fields to be pasted and the columns in the detail list. You therefore must prepare the data to be pasted so that it corresponds to the structure of the columns in the detail. For example, if you place your cursor in the first column of the detail list, the data belonging to the first column to be pasted will be pasted in the first column of the detail list; the data from the second column to be pasted will be pasted in the second column of the detail list, and so on.
- It is important to place your cursor in the column of the detail list from which you want to paste data. You must also verify that the number of columns to be pasted is identical to the number of columns to the right of column A (column A included).
- If records are selected in the detail list, the records pasted replace the selected records. Don't forget to unselect the record in the detail list, which is selected by default, if you don't want it to be deleted from the detail list when the data is pasted. (This is done by clicking it while holding down the CTRL key.)
- You can paste data in a detail list if there is a direct link between the table of the main list and each field of the table of the detail list. On the other hand, you cannot paste data in a detail list if there is no direct link between the table of the detail list and the main table. For example, you can paste data in the **Documents** detail of an asset, since the Assets and Documents tables are linked. However, you cannot paste data in the **Assets** detail of a contract. In effect, there is an intermediate table between the Contracts table and the Assets table, i.e. the table of assets under contract.

Web client

Use the paste commands of your OS or browser.

Deleting text

Windows client

To delete text without having to cut it to the Clipboard, select the text and then use the **Edit/ Cut** command (Keyboard shortcut: **Del** key).

> **Note:**
>
> The **Edit/ Cut** command does not apply to records in a list or to images.

Web client

Use the delete commands of your OS or browser.

Date- Data-entry rules

Windows client

- Use the Windows Control Panel to define the order format for entering and displaying the day, month and year. Use this order when entering dates.
- You must always enter all three items: day, month and year.
- The /, ;: or space characters can be used as separators to separate days from months and years.
- You do not have to enter a "0" before single-digit years, days or months.
- You may enter the year in 2 or 4 digits (for example, "1996" or "96"). Numbers from 00 to 49 return 2000 to 2049. Numbers from 50 to 99 return 1950 to 1999.
- To enter today's date, press *CTRL + ;*.

Time: Data-entry rules

Windows client

Hours, minutes and seconds are authorized.

Separate the units with a colon *:*. For example:

```
10:08:54
```

Date + time fields- Data-entry rules

Windows client

These fields are processed differently from *Date* fields.

The entry format for a *Date and time* field is:

```
Date[<Separator>[Hour]]
```

The possible separators are: . / ; , : -

Date is a string representing the date. Its syntax is as follows:

```
xx<Separator>yy<Separator>zz
```

where *xx*, *yy* and *zz* are strings representing integers.

Time is a string representing the time. Its syntax is as follows:

```
hour[<Separator>[minute[<Separator>[second[<Separator>[millisecond[<Separa
tor>]]]]]]]
```

where *hour*, *minute*, *second*, *millisecond* are strings representing integers.

The following rules are applied:

- Define the order for entering the month, day and the year via the Windows Control Panel. Use this order when entering dates.
- You must systematically enter a day, a month and a year.
- You are not required to enter leading "0"s before the years, months, or days in a date.
- You can enter the year using 2 or 4 digits (e.g.: "1995" or "95"). Numbers from 00 to 49 return 2000 to 2049. Numbers from 50 to 99 return 1950 to 1999.
- Use the CTRL+ SEMI COLON (;) keyboard shortcut to display the current date and time.

Images

Windows client

AssetCenter lets you attach three types of images:

- Bitmap files (with the `.bmp` extension) in 16 or 256 colors. Their advantage is that they can be displayed quickly.
- Windows metafiles. These are vector-based images that are slower to display but that may be re-sized without loss of quality (files with `.mtf` extension name).
- Icon (files with `.ico` extension name).

Recommendations

- In the **Photo** tabs, you can use any of these three formats.
- The small images that serve to illustrate records (the small square in the top left of record detail windows) are limited to a size of 16*16 pixels. For these images, we recommend using the `.bmp` format.
- To save disk space, we recommend using 16-color images.

Associating an image to a record

The image linked to a record is displayed in the top-left corner of the record detail. To attach an image, you can do the following:

- Either double-click the area where it is to be inserted. AssetCenter displays a window that enables you to select the file containing the image or to create a new one.
- Right-click the same zone and select **Select image** or **Select new image** from the shortcut menu. In this case, AssetCenter prompts you to select the image file.

To detach an image, right-click the image and then select **Delete image** from the shortcut menu.

Storing images

Images are stored in the **Images** (amImage) table of the AssetCenter database.

They are converted to a custom AssetCenter format then compressed in the form of a binary object.

Note:

You don't need to keep the external image file on the disk unless you want to modify it at a later stage.

Web client

Functionality not available.

3 Searching for items in a table

This chapter's objective is to teach you how to search for records with AssetCenter using filters.

You will learn how to:

- Use a query wizard,
- Distinguish the different types of filters available.
- Use the most popular filters.
- Apply several filters in cascade to narrow your search.

Query wizard (QBE)

Windows client

Before displaying a screen via a menu, a preliminary query, created using a wizard, can be used to pre-filter table data.

This wizard:

- Exposes a selection of fields used in the table and invites the user to enter a value for these fields
- Performs a quick query using the values entered by the user as filter conditions and displays the corresponding data

The AssetCenter database administrator defines which screens user a query wizard.

Pre-filtering data using a query wizard

Once the query is made, the table is filtered according to the criteria specified in the wizard.

To view all the data without any prefiltering:

- ❖ When the query wizard is displayed:
  - ▪ Click **Cancel**

    or
  - ▪ Click **OK** without specifying anything in the fields

Disabling the query wizards

To disable the query wizards:

- ❖ Change the value of the **Enable query wizards** option (**Edit/ Options/ Navigation** menu)

📌 Important:

This option enables or disables query wizards for all tables.

Web client

To filter records from a list using the query wizard defined by AssetCenter Database Administrator on the screen to which the list belongs, select the *QBE* filter from the drop-down list above the records list.

Overview of search filters

When you display a list of records (employees, for example), AssetCenter can display all the records in the list or just selected records. You use a filter to make this selection.

Windows client

You can use several filters together whether the list is hierarchic or not.

Types of filters available

There are several types of filters:

- ▪ 🔍 Standard filter: This is a filter that AssetCenter has already prepared for you. For example, the list of employees and departments comprises a filter that lets you display employees only, departments only, or both.

- ■ 🗦 Simple filter: This filter uses a single condition. This criterion only involves information contained in the table, or from a linked record. (In the list of employees, for example, the criterion could include the person's first name but not the name of their location.)

- ■ 🗦 Query filter: This filter executes a query that you write yourself. The query allows you to combine several selection criteria, concerning information in the list or in linked tables.

- ■ Specific filter: Some tabs in detail windows display a list of linked records (features or expense lines, for example). AssetCenter sometimes provides drop-down lists containing filters that are specific to the detail list. The filter conditions enable a selection of records from this list to be displayed.

Figure 3.1. Specific filter on the valid contracts concerning an asset
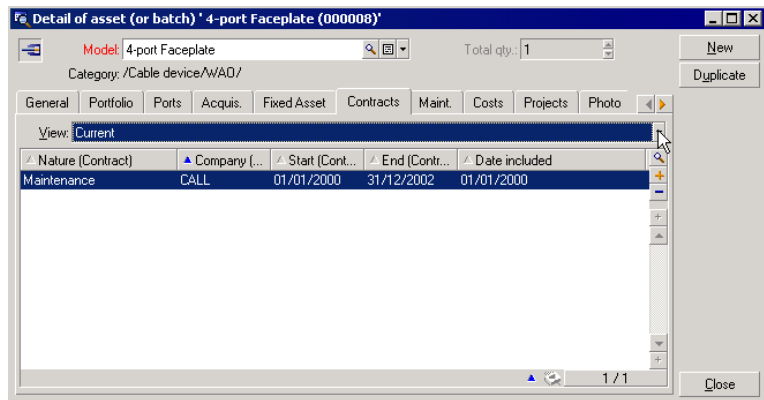
Superimposing filters

Several different filters can be simultaneously applied to a list for a variety of reasons:

- ■ Filters automatically applied according to the context: A combination of values taken from the fields in a detail define the display context. This automatically restricts the values proposed in the drop-down list of a linked field, for example. The user doesn't see explicitly that such a filter is being applied.

- ■ Filters applied according to user-profile "Access restrictions": These criteria mean that a specific user will only see the record that corresponds to criteria defined by the query in their user profile. The user doesn't see directly that such a filter has been applied.

- Filters applied in the foreground: simple, query, standard, specific filters. Defined elsewhere, these filters are accessed via the menu specific to the list displayed. The user clearly sees that such a filter is being applied in the filter zone on the left.
- Filters applied in the background: These filters are those which you can define in the **Filter (WHERE clause)** tab, accessible via the **Configure list** shortcut menu item. The user can see that this type of filter is applied as the 🔍 icon at the bottom right-hand corner of the list icon is colored. (Clicking directly on this icon also takes you directly to the **Filter** tab.)

Web client

Filters can be selected from the **Filter** drop-down list that is located above the lists.

This drop-down list contains:

- A table index filter, if the index is not on the primary key and only if one of the fields or links is part of the screen.

  If an administrator adds an index that follows these rules to a table using AssetCenter Database Administrator, then this new index will appear in the list of filters.

- A query filter whose context is the table for which the list displays the records.

  If a user adds a query, it will appear in the list of filters.

- A filter if pre-filtering was defined for the screen (**QBE Fields** of the screen's detail in AssetCenter Database Administrator)

Operation of filters in the Windows client

> ⚠ Warning:
>
> This section does not apply to the Web client.

- A filter has the effect of reducing the number of lines in a list and not the number of columns.
- An arborescence of components and sub-components represent records in hierarchical tables. The records that satisfy filter criteria appear clearly while the others are grayed-out.
- The only way to save a filter applied to a main list is to save it as a view (using the **Tools** menu) that you can call on later.

- In certain cases, to apply a filter (or filters), you need to click one of the icons that appear in the filter zones. If no such icon appears, the filter is applied automatically. If the icon appears in gray , it means that the filter is already applied. The icon appears normal again if you modify or add a filter condition.
- To update the filtering and take into account changes in the database, press F5 or use the **Window/ Refresh** command.
- When you apply several filters simultaneously, AssetCenter applies an "AND" condition (not "OR"). If a record is to be displayed while a filter is applied, it must satisfy all the conditions defined by the filters.
- In order to establish the logical conditions that define any filter, you have been provided with comparison operators.

Table 3.1. Comparison operators

Operator	Description
All	No restriction on the condition (this operator is only available is certain cases where it is necessary).
=	Equals
>	Strictly greater than
<	Strictly less than
>=	Greater than or equal to
<=	Less than or equal to
<>	Different from
LIKE NOT LIKE	Works like the = operator and allows you also to use wildcard characters ("%" for any character string, "_" for unique characters). For example, to obtain all the sub-locations of the "Ariane Building" from the table of locations, use LIKE '/Ariane Building/%'.

Using the Windows client's filters

⚠ Warning:

This section does not apply to the Web client.

You have two possibilities when filtering records:
- You can apply one or more filters in the foreground of a main list. The definition of these filters is visible to the left of the window containing the list.

- Or you can apply a query filter in the background to any list. The definition of this filter does not appear in the window displaying the list, but the 🖉 colored icon indicates the presence of the filter.

📝 Note:

These two methods are not mutually exclusive: You can apply to the same list one or more filters in the foreground and a filter in the background.

Here are the filter-removal methods:
- To remove all applied filters of a list, select the **No filter** option from the shortcut menu or from the specific menu of the list being displayed.
- To disable one or more filters:
  1 Place the mouse on the filter-definition zone that you want to disable.
  2 Right-click to display the shortcut menu.
  3 Select **Remove this filter**.
- To remove an AQL query filter applied in the background, display the shortcut menu (right-click with the mouse) and select **Utilities/ Configure list**, then the **Filter (WHERE clause)** tab. Click the [×] button.

📝 Note:

AssetCenter displays the results of your queries as quickly as possible: If it can optimize this process, then the results will appear almost immediately, even if the database is extremely large. Otherwise, the time it takes to return results depends on the database engine used, the occupation of the network (local or client-server) and the size of the database.

Applying one or many simple filters with the Windows client

⚠ Warning:

This section does not apply to the Web client.

Simple filters apply only to main lists, which is to say in the foreground.
1 Display the list of records to filter.
2 Select the **Simple filter** command from the specific menu of the list (situated to the right of the *Edit* menu).

A definition zone appears in the upper left-hand corner of the list.

3 Select the object in the table with the filter using the drop-down list to the right of 🔖.

4 Select a comparison operator from the drop-down list.

5 Enter a value with which to compare the chosen object.

   If the linked table is hierarchical, then the **Trees in drop-down lists** option from the **Navigation** section comes into play. It displays a checkbox at the bottom of the list zone that, if selected, also filters the sub-components of the selected object.

6 Click 🔘 to display the filtered records.

7 To apply another filter, select **And/ Simple filter** from the specific menu or right-click the list and then select **And/ Simple filter** from the shortcut menu.

Applying a query filter with the Windows client

1 Display and select a list.

2 Use the **Query filter** command in the specific menu or the shortcut menu to call up the filter-definition zone.

3 In the zone that appears, the first field presents a drop-down list of pre-existing queries from which you can select one.

   To define your filter criteria, enter directly the AQL expression of your query in the text zone.

   If you want AssetCenter to help you write your query, right-click the list and then select **Utilities/ Configure list** from the shortcut menu. Or, for main lists, click the 🔲 button in the filter-definition zone.

Figure 3.2. Query builder screen

1 Define your filter criteria in the **Filter** tab using Field 1 and Field 2 and their associated values, which define the selection criteria. An operator defines the logical comparison between these two fields.

Use the red arrow to insert the criteria into the query. You can delete the query using ⊠. Click **OK** to validate your query.

2 The list of assets with a filter can have this look:

The icon ⬦ becomes colored if a filter is applied in the background (filters are defined using the "Configure list" shortcut menu item

Number of records loaded in memory compared with the total number of records after filtering. If there is a question mark in the place of the number of the right, click on the button to launch the calculation.

4 Finally, click ⬦ to launch the filtering function.

4 Wizards

Definition of a wizard

AssetCenter wizards help you perform simple and repetitive tasks. They guide you step-by-step, in a graphic and intuitive manner, through the different phases necessary to perform a task. AssetCenter is delivered with predefined wizards that enable you, for example, to:

- Move users and assets from one location to another. The user chooses an employee - and the assets belonging to the employee - and moves them all to the new location. When all this information is supplied to the wizard, the location is updated for the employee and the assets.
- Manage stocks simply. The user selects assets in stock, an employee and a location. The wizard assigns the assets to the employee and the selected location.
- Collect information in order to execute any type of action.
- Facilitate record keeping.

Note:

In addition to the out-of-the-box wizards, AssetCenter allows you to create new wizards via the Windows client.

Who are wizards intended for?

Wizards are useful for both novice users and advanced users.

- Using wizards, a novice user can perform complex tasks more easily and without needing an in-depth understanding of AssetCenter and its inner workings.
- The advanced user can create new wizards or tailor existing ones to suit the needs of the company's internal business processes. The creation of these dedicated wizards requires the use of a scripting language, which is both powerful and flexible.

Types of wizards

Wizards can be divided into two major groups:

- Wizards that exchange data with the AssetCenter database.
- Wizards that are independent of the database.

Wizards that exchange data with the AssetCenter database

This group of wizards can be further divided into two sub-groups:

Data-entry wizards

These wizards make it easier to enter data into the database and create records from this data. For example, the "New Employee/Department" wizard guides you through the steps necessary to create a record in the Departments and Employees table. The information relating to the employee or department is collected by the wizard, which then creates the corresponding record. The user does not directly enter any information into the screen; the wizard does it all.

Data-collection wizards

Certain actions require the value of a field from the AssetCenter database or even the value of a variable. The wizards in this sub-group help you gather this information, then they pass it on to the action. For example, the "Move user" wizard collects data about the assets to move, the user of these assets and their new location. It then modifies the records corresponding to these items in the database.

Independent wizards

Independent wizards are essentially wizards that calculate or display items. You can, for example, create an "Addition" wizard that displays the sum of two numbers entered by the user.

Creating wizards

Wizard creation is reserved for advanced users

▶ Wizard creation is described in the *Actions* and *Wizards* chapters of the *Advanced use* guide.

Using wizards

Trigger a non-contextual wizard

Windows client

A non-contextual wizard can be triggered from:

- The **Tools/ Actions** menu
- The **Functions** tab on the Windows and Web client navigation bar if the action is associated with a functional domain

Web client

A non-contextual wizard can be triggered from the tree-structure navigation panel if the action is associated with a functional domain.

Trigger a contextual wizard

Windows client

A contextual wizard can be associated with a button that is present in a screen's detail. This allows the wizard to be triggered by clicking the button.

For example: In the detail for an employee, a department can be created by clicking the **+ Department** button.

Web client

A contextual wizard is triggered by selecting the action from the **Contextual actions** drop-down list at the top of the list screens.

For example: In the orders list, receipt of an order is done by triggering the **Receive** action from the **Contextual actions** list.

Navigating through a wizard

Wizards contain a succession of pages, each one of them displaying information or requiring a user to enter data or make a selection.

Navigating between the different pages of a wizard is simple:

- Once the page is populated appropriately, you can continue to the following page (determined by a transition) by clicking the **Next** button. This button does not appear on the final page.
- You can always go back to make any corrections by clicking the **Previous** button.
- You can execute the final action of the wizard at any given moment by clicking the **Finish** button. If the wizard does not have sufficient information in order to perform its task, the appropriate page is displayed.

You can cancel the execution of a wizard completely (and as a consequence, its associated action) by clicking the **Cancel** button.

Refresh a wizard page whose content is dependent on the value of a field from the same page.

Windows client

Refresh is automatic.

Web client

Refresh is not automatic.

You must display the wizard's previous or next page, and then return to the page that needs to be refreshed.

This is not always possible.

Limitations using wizards

▶ Actions (including wizards) [page 108].

5 Planner viewer (Windows client)

> ⚠ **Warning:**
>
> This chapter does not apply to the Web client.

Overview

What is the planner viewer?

The planner viewer is a representation of the events having a start, an end and possible deadlines.

These events relate to an individual record or a selection of records.

Examples:

- Employee absences
- Periods covered by contracts

The pages of the planner viewer only represent simple data (start, end and possible deadlines).

They do not provide any sophisticated scheduling functionality.

When the planner viewer is shown by default

By default, a planner viewer page is available in the details of the following tables:

- **Employees** (amEmplDept): **Absences** tab, **Preview** sub-tab lets you view absences.
- **Work orders** (amWorkOrder): The **Preview** tab lets you view scheduled work orders.
- **Contracts** (amContract): The **Preview** tab lets you view scheduled work orders under contract.
- **Projects** (amProject): The **Preview** tab lets you view projects.

When a planner viewer page can be added

A planner viewer page can be added to:
- The detail of a table using AssetCenter Database Administrator.
- A wizard using AssetCenter.

This is only true if you have at least the following information:
- A field storing a start (either the date or the date and time).
- A field storing an end (either the date or the date and time).

Using the planner viewer page

Figure 5.1. Planner viewer - layout
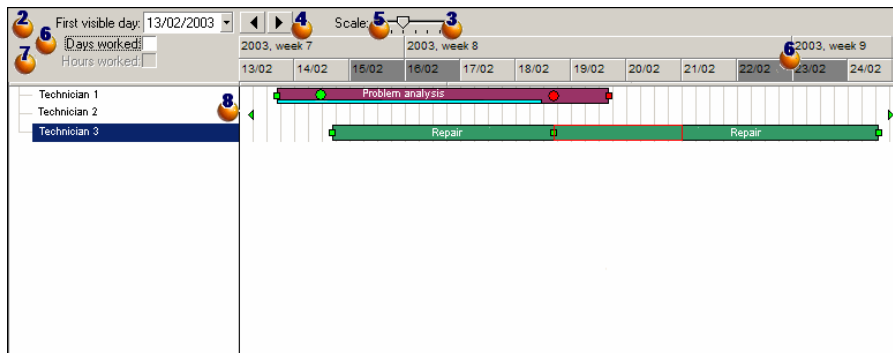
 Start by selecting all the records whose schedules you want to view.

 Select the first date that will be displayed in the frame (left-hand side of the time axis).

 To modify the time scale: Drag the slider left or right, or click either side of it, or activate the frame then press **Ctrl** while turning the mouse wheel.

 To move the time scale left (to go back in time): Click or activate the frame then roll the mouse wheel upwards.

 To move the time scale right (to go forward in time): Click or activate the frame then roll the mouse wheel downwards.

 Select the option **Days worked** to hide the days not worked. The days not worked appear in gray on the time axis. The **Days worked** option can only be selected if the scale allows it.

 Select the option **Hours worked** to hide the hours not worked. The option **Hours worked** can only be selected if the scale allows it.

 Graphical representation of events relating to the records selected in the list :

- A bar represents the period between the start and the end of an event.

  The fields used to define the start and the end of events depend on what was defined for the planner viewer page.

  When you place the pointer over the bar , a ToolTip is displayed to provide key information about that event.

  To move the bar without changing its size (i.e. without changing the duration of the event), select the bar with the mouse and move it. You'll notice that the start and end dates change but the duration stays the same.

  To just modify the start date, position the pointer over the left-hand border of the bar . The pointer changes appearance and becomes a size pointer. Now drag the pointer to resize the bar. You'll notice that the end date stays the same.

  To just modify the end date, position the pointer over the right-hand border of the bar . The pointer changes appearance and becomes a size pointer. Now drag the pointer to resize the bar. You'll notice that the start date stays the same.

  You must confirm these modifications using the **Modify** button in order to save the in the database.

  To display the detail of an event in a new window, double-click .

  When the table structure allows it, you can drag an event from one line to another. In the example given in the Planner viewer - layout [page 82] diagram, this would mean reassigning the work order to another technician.

- The red circle and green circle represent deadlines when deadlines are defined in the planner viewer page. This is the case, for example, with work orders (**Expected resol.** field (dtResolLimit)). This is not the case, for example, with employee absences.

  A circle is red when the deadline it represents is not respected.

It is green when the deadline is respected.

- The red square ▪ and the green square ▫ indicate a deadline. Each square is associated with a circle of the same color.

  The square is to the left of the bar ▭ if the deadline is defined with regards to the start of the event.

  The square is to the right of the bar ▭ if the deadline is defined with regards to the end of the event.

  A square is red when the deadline it represents is not respected.

  It is green when the deadline is respected.

- The green triangles ▸ and ◂ indicate an event that does not appear in the 🔁 frame because of display parameters.
- A red square ▭ defines the overlapping zone of two events.
- A green bar ▬ indicates the progress percentage of an event.

> ⚠ Warning:
>
> The progress bar is only displayed when the bar ▭ is fully contained within the screen.

Practical case

The following practical case shows you how the planner viewer works.

Outline of the practical case

The practical case will take you through the following operations:

1 Creating the first group.
2 Creating two technicians.
3 Creating two work orders.
4 Viewing the key dates of these work orders.
5 Graphically modifying certain key dates.

Step 1 - Create the group

1 Launch AssetCenter.
2 Connect to the demonstration database.
3 Display the list of groups via the **Portfolio/ Groups** menu.
4 Create a group by only populating the following fields:

Name of the field	SQL name of the field	Value
Name	Name	PC - Group

5 Close the window (**Close** button).

Step 2 - Create the technicians

1 Display the list of employees via the **Portfolio/ Departments and employees** menu.

2 Create 2 employees by only populating the following fields:

Tab	Name of the field or link	SQL name of the field or link	Value for work order 1	Value for work order 2
	Name	Name	PC - Technician 1	PC - Technician 2
Groups	Group members	EmplGroups	PC - Group	PC - Group

3 Close the window (**Close** button).

Step 3 - Creating the work orders

1 Display the list of work orders (**Portfolio/ Work orders** menu).

2 Create two work orders. Only populate the following fields:

Tab	Name of the field	SQL name of the field	Value for work order 1	Value for work order 2
	Work order #	WONo	PC1	PC2
	Notified on	dtNotif	08/19/2002 11:00:00	08/19/2002 11:00:00
	Expected resol.	dtResolLimit	08/20/2002 17:00:00	08/23/2002 17:00:00
General	Type	seType	Internal maintenance	Internal maintenance
General	Title	Title	Analysis	Repair
Tracking/ Technician	Int. technician	Contact	PC - Technician 1	PC - Technician 2
Tracking/ Scheduling	Planned start	dtSchedFixStart	08/20/2002 14:00:00	08/21/2002 14:00:00
Tracking/ Scheduling	Planned end date	dtSchedFixed	08/21/2002 12:00:00	08/22/2002 17:00:00

Step 4 - Viewing the schedule of the two work orders

1 Select both work orders *PC1* and *PC2*.

2 Select the **Preview** tab.

Figure 5.2. Planner viewer - Example with work orders
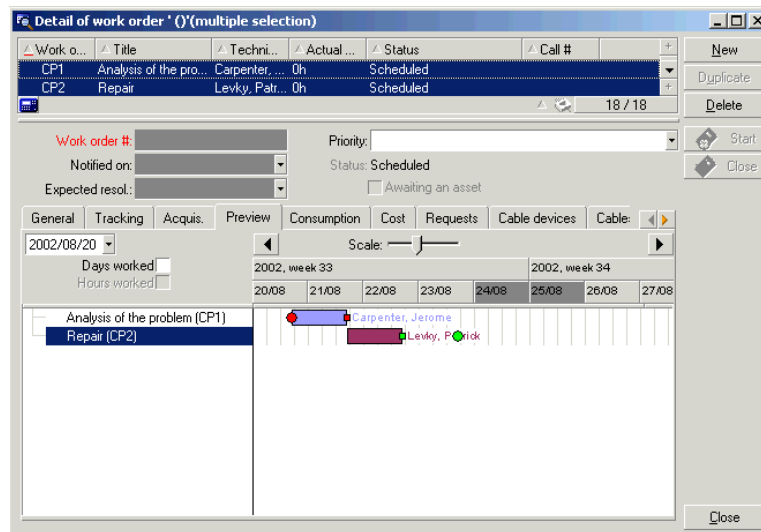
3 Use the **Scale** slider and the ◄ and ► buttons to view the entire period covered by the two work orders.

You can also enable the 🐌 frame then press the **CTRL** key while turning the mouse wheel, instead of using the **Scale** slider.

You can also use the mouse wheel instead of using the ◄ and ► buttons.

Here is how you to read the page:

- The bars ▭ represent the period between the planned start (dtSchedFixStart) and planned end (dtSchedFixed) of the work order.

  Its color depends on which work order you select.

- The red circle ● and green circle ● represent the deadlines (**Expected resol.** field (dtResolLimit)).

- The red square ■ and the green square ■ indicate a deadline.

- The circle ● and the square ■ of the work order *PC1* are read because the planned end date (dtSchedFixed) of the work order comes after the expected resolution date (dtResolLimit).

- The circle ● and the square ■ of the work order *PC2* are green because the planned ending date for the work order comes before the expected resolution date (dtResolLimit).

Step 5 - Graphically modifying the dates

1 Display the list of work orders (**Portfolio/ Work orders** menu).
2 Select both *PC1* and *PC2*.
3 Select the **Preview** tab.
4 Select the bar ⬜ of *PC1* with the mouse and move the entire bar.

   You must confirm this modification using the **Modify** button.

   You'll notice that the **Planned start** and **Planned end** dates get modified.
5 Position the pointer over the left-hand border of the bar ⬜ of *PC2*. The pointer changes appearance and becomes a size pointer. Now drag the pointer to resize the bar.

   You'll notice that the **Planned start** field gets modified but the **Planned end** field stays the same.
6 Double-click the ⬜ bar; A new window with the work order detail is displayed.

Customizing how the planner viewer pages work

The options governing how all the planner viewer pages work are defined via the **Edit/ Options** menu. Then go to **Display/ Planner tools**.

📝 Note:

The fact that only Saturday and Sunday can be declared as unworked days cannot be changed.

6 Printing data

This chapter explains how to print data with AssetCenter.

Overview

Windows client

Using the **File/ Print** menu item or the "Ctrl+P" keyboard shortcut, you can print any main list or some of its selected records - filtered or not - keeping the column configuration that you have chosen.

AssetCenter enables you to choose from two printing formats:

- Internal forms: The list and detail templates for these forms are located in the Forms table.

  Access this table via the **Tools/ Reporting/ Forms** menu in order to create, modify or delete forms (see the chapter *Forms* in the *Advanced use* guide).

- Crystal Reports: The list, detail, graph or example templates are located in the Reports table.

  You can access this table to consult the available forms via the **Tools/ Reporting/ Reports** menu. If you want to add new forms, however, you need to have the Crystal Reports application installed. This offers more powerful reporting functionality than the internal forms. (See the chapter *Crystal Reports* in the *Advanced use* guide.)

Web client

Using Microsoft Internet Explorer:
1 Display the screen that you want to print.
2 Click the 🖻 icon at the upper right of the Web client's workspace.

A new Internet Explorer window is displayed.
3 Print the window using Internet Explorer's print functions.

Printing information from a list

Windows client

1 Display the main list.
2 Launch the **File/ Print** menu item (keyboard shortcut: **Control** + **P**).
3 Choose the type of form you want to use from among the four values appearing in the drop-down list **Type**:

   ■ Detail forms (internal): This prints information from the main list or from selected records in the list based on a detailed template.

   In the **Form** field of the Forms table, AssetCenter proposes detail-type forms relating to the main list from where you printed. These forms define the contents and the look of the printed copy.

   ■ List forms (internal): This prints information from the main list or from selected records in the list according to a template.

   In the **Form** field of the Forms table, AssetCenter proposes list-type forms relating to the main list from where you printed. These forms define the contents and the look of the printed copy.

   ■ Detail reports (Crystal): This prints a record from the main list according to a detailed template.

   To print the detail of several records, you must repeat the printing steps for each record. In the Printing window that appears for this step, AssetCenter offers you a choice of reports to choose from in the **Form** field; all these reports bear a reference table. This being the case, a report will not appear in this field unless you have already populated the **Table** of that report's detail (in the Reports table). Having done so, you will see the reports concerned by the main list from where you launched the printing function. These reports define the contents and form of the printing.

   ■ Non-contextual reports (Crystal): This enables you to choose from among all the report templates the one which you want to print.

The printing process has nothing to do with the context defined by the main list, if one has indeed been selected. In the Printing window, AssetCenter offers you a choice of reports to choose from in the **Form** field; contrary to the Detail reports, none of these reports bear a reference table. This being the case, the **Table** of that report's detail (in the Reports table) must be empty. If it is not empty, then you will not see the reports concerned by the main list from where you launched the printing function. These reports define the contents and form of the printing.

4 Choose a form from the drop-down list in the **Form** field.

5 Click **Print**.

Web client

1 Display the list that you want to print.

2 Click the 🖨 icon at the upper right of the Web client's workspace.

A new Internet Explorer window is displayed.

3 Print the window using Internet Explorer's print functions.

Printing the detail of records

Windows client

Before printing several records selected from a main list (the value of the **Type (SQL Name: Type)** field must be **Detail form (internal)**), you must select between three print settings via the radio buttons:
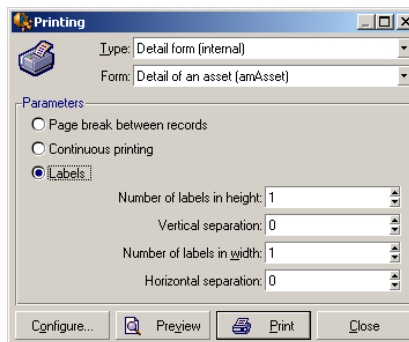
■ Page break between records: prints the detail of each record on a new page.

- Continuous printing: prints record details one after another; no page breaks.
- Labels: prints record details as labels spread out over the page, according to the following parameters:
  - Number of labels in height
  - Vertical separation: Spacing, in millimeters, between two lines of labels.
  - Number of labels in width
  - Horizontal separation: Spacing, in millimeters, between two columns of labels.

Note:

If you only select one record, these ordering parameters will not be available, since they will obviously not be necessary.

Web client

1 Display the detail that you want to print.
2 Click the icon at the upper right of the Web client's workspace.
A new Internet Explorer window is displayed.
3 Print the window using Internet Explorer's print functions.

Print preview

Windows client

For a print preview, click **Preview**.

The print preview window enables you to:
- Change the target printer (**Configure** button).
- Change the margins and zoom factor of your form (**Page setup** button).
- Print your data (**Print** button).
- Display the other pages of the form (**Previous** and **Next** buttons).

Web client

Using Microsoft Internet Explorer:
1 Display the detail that you want to print.
2 Click the icon at the upper right of the Web client's workspace.

A new Internet Explorer window is displayed.

3   Use your browser's print preview function.

7 Differences between the Windows client and the Web client

A user can access the AssetCenter database in different ways:

- Via the Windows client
- Via the Web client

This chapter describes the main differences that exist between both clients.

Overview

For a standard user, working with AssetCenter consists mainly of managing information stored in the AssetCenter database.

In most cases, the database is stored on a server where is can be accessed by many users.

The Windows client and the Web client are components that allow users to access the AssetCenter database.

The main differences are presented in the following table. More details are given further in the guide.

	Windows client	Web client
Supported platforms	Windows.	Platforms listed in the AssetCenter compatibility matrix.
Installation	The Windows client must be installed user's workstation.	Any Internet browser listed in the AssetCenter compatibility matrix.

	Windows client	Web client
Available functions	All available functions	Some functions are not available.
		More functions will be added to the Web client in future versions.
Interface	Traditional interface.	Interface similar to common Web interfaces.

Minimum client installation and configuration

Windows client

On each client station:

1 Install the Windows client.
2 Start the Windows client (**Start/ Programs/ HP OpenView/ AssetCenter 5.01/ HP OpenView AssetCenter** Windows menu).
3 Create the connection to the database (**File/ Manage connections** menu).

Web client

On each client station:

1 Check that each station has one of the Internet browsers listed in the AssetCenter compatibility matrix.
2 Create a shortcut or bookmark that points to the desired language version of AssetCenter Web Tier.

Connecting to the AssetCenter database

Windows client

To connect to the AssetCenter database:

1 Start the Windows client (**Start/ Programs/ HP OpenView/ AssetCenter 5.01/ HP OpenView AssetCenter** Windows menu).

The **Connect to database** window is displayed.
2 Enter information provided by your company's AssetCenter administrator in the fields.

Web client

To connect to the AssetCenter database:

1 Start one of the Internet browsers listed in the AssetCenter compatibility matrix.

2 Connect to AssetCenter Web Tier via the URL provided by your company's AssetCenter administrator.

Differences between the clients

This section describes the differences between the Web client and the Windows client.

This list is subject to change in future versions of AssetCenter.

Graphical interface

Desired action	Using the Windows client	Using the Web client
Select the display language for multilingual objects from the database and the interface (as opposed to database data). Examples: Menu entries, labels of fields and links, error messages	1 Add the parameters for the desired language in the AssetCenter database via AssetCenter Database Administrator. 2 Install the AssetCenter client in the desired language. 3 Start the Windows client of the desired language.	1 Add the parameters for the desired language in the AssetCenter database via AssetCenter Database Administrator. 2 Install the desired language version of AssetCenter Web Tier and AssetCenter Web Service. 3 Start a supported Internet browser. 4 Connect to the desired language version of the AssetCenter Web Tier application. Note: You will need to install an AssetCenter Web Tier / AssetCenter Web Service combination in each of the desired languages.

Desired action	Using the Windows client	Using the Web client
Use shortcut menus	When you right-click, a shortcut menu is displayed. Menu items on the shortcut menu depend on where the cursor is on the screen when you right-click. For example, in a list, a **Tree view** shortcut menu is available.	No shortcut menus are available. Some of them have been replaced by drop-down lists that contain actions, filters and statistics which are valid for a given table.
Display several windows in the AssetCenter workspace.	You can display several windows in the AssetCenter workspace.	Only one window at a time of the AssetCenter workspace can be displayed in the Internet browser.
Define interface options	The **Edit/ Options** menu allows you to configure the behavior of the Windows client interface.	No options are available to configure the behavior of the Web client interface.
Display a window For example: Display the list and/or details for locations	Windows are displayed via menu items: ▪ On the menu bar For example: **Portfolio/ Locations** menu ▪ On the toolbar. For example: The **Locations** icon ▪ **Functions** tab on the navigation bar For example: **Organization/ Locations**	Windows are displayed by clicking the links in the navigation panel on the left For example: **Organization/ Locations**
Use Internet browser buttons Example using Microsoft Internet Explorer. **Back** and **Forward** buttons	Not available	Imagine that you want to change the value of the **FieldLinkX** field or link. If you click one of the Internet Explorer browser buttons before clicking the **Save** button or before having selected another field or link, changes to **FieldLinkX** will not be saved when other changes are saved (using the **Save** button).
List and detail of records: Available display types	The following display modes are available: ▪ List only ▪ Detail only ▪ List and detail	The following display modes are available: ▪ List only ▪ Detail only

Desired action	Using the Windows client	Using the Web client
List and detail of records: Going from one display mode to another	You have the following possibilities: ■ **Window/ List only**, **Window/ Detail only** and **Window/ List and detail** menus ■ Corresponding icons on the toolbar ■ **Detail** button	■ To go from list to detail: Click the link of the record to display in the list. ■ To go from detail to list: Click the **Return to list** in the detail.
Display new internal messages automatically	A dialog box is displayed when new messages are received and asks the user if he or she would like to read them: ■ When connecting to the database ■ During the connection Click **Yes** and a wizard will open to display the messages.	When connecting to the database, a link informs the user that he or she has new messages. A wizard will open when the user clicks the link to read the messages.
Enable/ Disable modules	File **Activate modules**	Not available
Display icons and graphics associated with the records in list and detail screens. Examples: Icon at the upper left of the records' detail, **General** tab for the floor plans.	Available	Not available
Display news marquee	**Window/ Display news marquee** menu	Not available
Use views	Views can be created, changed, deleted and displayed (**Tools/ Views** menu)	Views cannot be created, changed, deleted or displayed
Activate accessibility options (for users with visual impairments)	Available	Use the accessibility options of your Internet browser
Create a favorite	1 On the **Functions** tab of the navigation bar, select the link to add to your favorites. 2 Right-click. 3 Select **Add to favorites** from the shortcut menu that is displayed.	Using Microsoft Internet Explorer: 1 Display the screen that you want to add to the browser's favorites. 2 Click the 🔖 icon at the upper right of the Web client's workspace. A link is created to the page and is added to Internet Explorer's favorites.

Desired action	Using the Windows client	Using the Web client
Print the contents of the current window (list detail, wizard page, etc.)	Not available	Using Microsoft Internet Explorer: 1 Display the screen that you want to print. 2 Click the 🖨 icon at the upper right of the Web client's workspace. A new Internet Explorer window is displayed. 3 Print the window using Internet Explorer's print functions.

Record lists

Desired action	Using the Windows client	Using the Web client
Filter records in a list	You have the following possibilities: ■ **<Table name>/ No filter**, **<Table name>/ Simple filter** and **<Table name>/ Query filter** menus ■ **Filter on this field** and **Filter on this link** shortcut menus ■ 🔍 icon at the bottom of the lists ■ Filter saved in the views	Filters can be selected from the **Filter** drop-down list that is located above the lists. This drop-down list contains: ■ A table index filter, if the index is not on the primary key and only if one of the fields or links is part of the screen. If an administrator adds an index that follows these rules to a table using AssetCenter Database Administrator, then this new index will appear in the list of filters. ■ A query filter whose context is the table for which the list displays the records. If a user adds a query, it will appear in the list of filters. ■ A filter if pre-filtering was defined for the screen (**QBE Fields** of the screen's detail in AssetCenter Database Administrator)

Desired action	Using the Windows client	Using the Web client
Sort the records on a given column	Both the main lists and the secondary lists (lists under the tabs) can be sorted.	The main lists can be sorted but not the secondary lists (lists under the tabs).
	To sort a list for a given column, click the column's name.	In order to sort a column, a field or link corresponding to the column must:
	The sort order changes each time you click:	■ Be part of the table to which the screen belongs.
	1 Not sorted	■ Be either the unique field or link of an index of the table to which the screen belongs.
	2 Ascending	To sort a list for a given column, click the column's name.
	3 Descending	The sort order changes each time you click:
	4 *Not sorted*	1 Not sorted
	5 Ascending	2 Ascending
	6 Descending	3 Descending
		4 Ascending
		5 Descending
		It is not possible to return to the *Not sorted* status in the Web client.
Customize the number of records displayed in the lists and how they are displayed	The number of records in the lists and how they are displayed is set in the **Edit/ Options/ Lists/ Main lists** or **Edit/ Options/ Lists/ Others lists**.	By default, lists display 20 records per page. The options from the Windows client menus, **Edit/ Options/ Lists/ Main lists** or **Edit/ Options/ Lists/ Other lists**, are not implemented.
Calculate the total number of records in a table	Click the **x / ?** button at the lower right of the records lists (main and secondary lists) to calculate	Click the **Update** link at the upper right of the records lists (main lists only)
Select all records in a list	All records in both the main lists and the secondary lists (lists under the tabs) can be selected. **Edit/ Select all** menu	All records in the main lists, but not in the secondary lists (lists under the tabs), can be selected: Check box to the left of the column names. Only those records that are visible are selected.
Display a list in tree view	The list of records from a hierarchical table can be displayed in tree view (**Window/ Tree view** menu)	The list of records from a hierarchical table cannot be displayed in tree view
Find a record in a list quickly	To find a record in a list quickly, sort the list on the desired column, then use the **Go to** shortcut menu.	The Go to command is not currently available for the Web client.

Desired action	Using the Windows client	Using the Web client
Export the contents of a list	**Utilities/ Export the list** shortcut menu item.	You can copy the visible contents of the list to the clipboard.
Group records from a list	**Group by this field** shortcut menu	Not available
Select columns to display in a list	By default, the columns that are displayed in a list correspond to the fields and links that are defined for the screen via AssetCenter Database Administrator (**Columns in the list** field). The **Utilities/ Configure list** shortcut menu is used to modify the default column selection.	The columns that are displayed in a list correspond to the fields and links that are defined for the screen via AssetCenter Database Administrator (**Columns in the list** field).
Display statistics for a list	1 Display the list. 2 Sort on the column for which you want to display statistics. 3 **Utilities/ Statistics on this column** shortcut menu.	1 Display the list. 2 Select the statistic from the **Stat.** list. The list displays an entry by: ■ Table index, except if the index is on the primary key ■ Statistic whose context is on the table
Add the numbers of a column in a list	Click the calculation icon at the lower left of the list	Not available
Delete records	Select the records and click the **Delete** button.	Select the records and select the *Delete* contextual action
Display a record prefilter window	Available	Not available

Desired action	Using the Windows client	Using the Web client
Cut, copy or paste records from a detail list	Under some conditions, you can use the **Edit** menu or equivalent shortcuts	Not available

Records detail

Desired action	Using the Windows client	Using the Web client
Organization of fields and links within tabs, when these fields are part of the main table or when these links are type 1. For example: detail of a portfolio item, **Acquis.** tab.	These tabs contain sub-tabs. For example: The **Acquis.** tab of the detail of a portfolio item contains the sub-tabs **Price and conditions** and **Procurement**.	These tabs contain frames that correspond to sub-tabs of the Windows client. For example: The **Acquis.** tab of the detail of a portfolio item contains the frames **Price and conditions** and **Procurement**.
Create a record on the fly when editing a link in a record's detail	1 In the link edit zone, enter a value instead of selecting a record in the list. 2 Place the cursor outside of the link edit zone. The Windows client allows you to create a record in the target table of the link.	Not available
Organization of links within tabs, when these links are type n. For example: Detail of an asset or batch, **Portfolio** tab	Linked records can be displayed as lists or as a series of tabs	Linked records displayed as lists
Display monetary fields	Monetary fields display the amount and the currency symbol. The position of the symbol is defined in the currency's detail. The symbol can be edited manually. Exchange values can be displayed for the reference currencies by clicking an icon to the right of the monetary field.	Monetary fields display the amount without the currency symbol. The currency symbol appears to the right of the amount, in a drop down list. The position of the symbol defined in the currency's detail is not implemented. Exchange values for the reference currencies cannot be displayed.

Desired action	Using the Windows client	Using the Web client
Use customizable itemized lists	Fields populated via customizable itemized lists have an icon to their right.	Fields populated via customizable itemized lists do not have an icon to their right.
	Click the icon to display the list of values.	Placing the cursor in the field edit zone displays the list of values.
	You can select a value from the list or enter a value that does not already exist.	You can select a value from the list or enter a value that does not already exist.
	The value will be added if the itemized list is open (list of values can be modified by users).	The value will be added if the itemized list is open (list of values can be modified by users).
Configure the list under the tabs to display in a detail screen	**Configure tabs** shortcut menu	Not available
Display planner viewer pages. For example: Detail of work orders, **Preview** tab.	Available	Not available
Display the **Tracking** tab for requests, orders, receipts and invoices	Available	Not available
Define an alarm for a *Date* type field	🌐 icon to the right of the *Date* type field	Not available
Use the Basic script editor	Click the icon to the right of the *Basic Script* type fields	Not available
Display the **Workflow** tab of the records detail.	Available	Graphical part not available
Populate the fields that designate a table in the AssetCenter database. For example: In the detail of a calculated field, the **Table** (TableName) field.	Select the table from a list	You can only view the table's SQL name
Configure fields or links	**Configure object** shortcut menu	Not available
Save the information in the detail window as a new record and start creating a new record using the current information	Create button	Not available
Delete a record	Not available when the list is not displayed	**Delete** button

Desired action	Using the Windows client	Using the Web client
Populate a link by selecting a record from a drop-down list	▾ button	Not available
Cut, copy, paste, delete text in the fields	Use the **Edit** menu or equivalent shortcuts	Use the commands of your OS or browser
Modify a document stored in the database	1 Display the detail of the record to which the document is attached. 2 Display the **Documents** tab. 3 Display the detail of the document to modify. 4 Click **Run**. 5 When the **Would you like to integrate the changes that you are going to make to the document into the database?** message appears, click **Yes**. 6 Modify the document. 7 Save the changes made to the document. 8 Close the document. 9 Go back to the **Documents** tab of the record to which the document is attached. 10 Click **Modify**.	1 Display the detail of the record to which the document is attached. 2 Display the **Documents** tab. 3 Display the detail of the document to modify. 4 Click **Export**. 5 Save the document to your local disk (somewhere outside of the AssetCenter database). 6 Edit and modify the document you just saved. 7 Save your changes made to the document. 8 Close the document. 9 Go back to the **Documents** tab of the record to which the document is attached. 10 Click **Detach**. 11 Select the modified document (button to the right of the **Upload** field). 12 Click **OK**.

Desired action	Using the Windows client	Using the Web client
Enter a duration	- You may leave a space between the quantity and its unit. - The following decimal separators are valid: . , - If you enter a value without a unit, AssetCenter applies the default unit of the field. - When entering a value with no integer, you may enter: 0,1 0.1 ,1 .1 - Do not enter any separator between the figures (no periods, commas or spaces).	- You must leave at least one space between the quantity and its unit. - The decimal separator that is used is the one that is defined in the application server's regional settings. - You cannot enter a number without a unit. - You can enter units in any order.

Actions on records

Desired action	Using the Windows client	Using the Web client
Create a record composed of another table's sub-records. For example: Create an order made up of order lines.		

Desired action	Using the Windows client	Using the Web client
	1 Display the list of orders (**Pro-curement/ Purchase orders and estimates** menu).	1 Display the list of orders (**Procurement/ Purchase orders and estimates** link in the navigation panel on the left).
	2 Display the detail of a new order (**New** button).	2 Display the detail of a new order (**New** button).
	At this stage, the order is not created. You can cancel the order creation (**Cancel** button).	At this stage, the order is not created. You can cancel the order creation (**Cancel** button).
	3 Create the order (**Create** button).	3 Display the **Composition** tab.
	This is required if order lines are to be added.	4 Add an order line (**Add** button).
	This creates the record. You cannot cancel the creation process. You can, however, delete the record (**Delete** button).	At this stage, neither the order nor the order line is created. You can cancel the order creation (**Cancel** button).
	4 Display the **Composition** tab.	5 Add an order line to the order (**OK** button).
	5 Add an order line (**+** button).	The order is created. The order line is created and added to the order. You cannot cancel the creation process. You can, however, delete the order and its order lines (**Delete** button).
	At this stage, the order line is not created. You can cancel the order creation (**Cancel** button).	
	6 Add an order line to the order (**Add** button).	
	The order line is created and added to the order. You cannot cancel the creation process. You can, however, delete the record (**-** button).	
Authorize extended deletions for records	To configure this possibility:	Not available
For example: When you delete a location, AssetCenter provides you with the following possibilities:	1 Select the *Edit/ Options* menu.	
	2 Assign the value *Yes* to the **Authorize extended deletions** option.	
▪ Delete employees linked to the location		
▪ Delete the link to the location		
▪ Assign employees to another location		

Desired action	Using the Windows client	Using the Web client
Modify a selection of records	It is possible to modify a value for a selection of several records simultaneously	Not available
Modify a record (multiple users working on the same record)	A warning message is displayed for the last user who clicks **Modify**. The user is prompted to either overwrite the other user's changes or cancel his or her own changes.	A warning message is displayed for the last user who clicks **Save**. The user cannot save his/her changes.
Duplicate a record n times	**Edit/ Duplicate** menu	Not available

Help

Desired action	Using the Windows client	Using the Web client
Display context-sensitive help for fields or links	**Help/ Help on this field** menu	Not available
Display the online Help	**Help/ Index** menu	Not available
Display tips of the day	**Help/ Tip of the day** menu	Not available
Display the readme.txt file	**Help/ Read-me** menu	Not available
Display information about AssetCenter and its environment	**Help/ About AssetCenter** menu	Double-click the banner at the top of the workspace. Only part of the information that is available in the Windows client is available.

Actions (including wizards)

Desired action	Using the Windows client	Using the Web client
Types of supported actions	All action types	Only *Script* and *Wizard* type actions
Trigger a non-contextual action	A non-contextual action can be triggered from: ■ The **Tools/ Actions** menu ■ The **Functions** tab on the navigation bar, if the action is associated with a functional domain	A non-contextual action can be triggered from the tree-structure navigation panel if the action is associated with a functional domain.

Desired action	Using the Windows client	Using the Web client
Trigger a contextual action	A contextual action can be triggered from: ■ The **Tools/ Actions** menu ■ The shortcut menu associated with a table, **Actions** sub-menu	Actions are triggered by selecting the action from the **Contextual actions** list at the top of the list screens. For example: In the orders list, receipt of an order is done by selecting the **Receipt** action from the **Contextual actions** list.
Use the **lMode** parameter from the **AmMsgBox(strMessage As String, lMode As Long) As Long** API in a wizard	All the dialog box types displayed are supported: ■ *0* : Simple dialog box with an **OK** button. ■ *1* : Dialog box with **OK** and **Cancel** buttons. ■ *2* : Dialog box with a **Cancel** button.	**OK** and **Cancel** buttons are not implemented
Use the **AmWizChain(strWizSqlName As String)** API in a wizard	All wizard types referenced by the **strWizSqlName** parameter are supported	Only wizards whose "Root" node has a *MODAL=FALSE* property are supported (wizard referenced by the **strWizSqlName** parameter). Wizards whose "Root" node has a *MODAL=TRUE* are considered as having a *MODAL=FALSE* property.
Refresh a wizard page whose content is dependent on the value of a field from the same page.	Refresh is automatic	Refresh is not automatic. You must display the wizard's previous or next page, and then return to the page that needs to be refreshed. This is not always possible.
Use global variables in the wizards	Global variables can be defined for the following nodes: ■ Root ■ Long ■ String ■ Double ■ Date	Global variables can be defined for the following nodes: ■ Long ■ String ■ Double ■ Date
Define the *TABLE=* and *FIELD=* properties of a *DBEDIT* control used by a wizard	You can use a script to define these properties	You cannot use a script to define these properties
Support of BASIC functions used to handle files	All functions are supported	Only the storage of a file in the AssetCenter database is supported

Desired action	Using the Windows client	Using the Web client
When a wizard is running, display a AssetCenter window that is unrelated to the wizard.	This is possible with some wizards.	This is not possible. If you try to do this, AssetCenter stops running the wizard and asks you for confirmation.

Reporting

Desired action	Using the Windows client	Using the Web client
Display Crystal Reports statistics	**Tools/ Reporting/ Crystal Reports statistics** menu	Not available
Print reports	**Tools/ Reporting/ Reports** menu	Not available
Print forms	**Tools/ Reporting/ Forms** menu	Not available
Print a detail or list form, or detail or list report	**File/ Print** menu	Not available
Display the software dashboard	**Software/ Dashboard** menu	Not available

Contracts

Desired action	Using the Windows client	Using the Web client
Manage application service contracts	**Contracts/ Application services** menu	Not available
Only display *Blanket purchase order* type contracts	**Contracts / Blanket purchase orders** menu	Not available
Only display *Master lease* type contracts	**Contracts/ Master leases** menu	Not available
Only display *Leasing* type contracts	**Contracts/ Lease schedules** menu	Not available
Accept assets under lease schedule	Detail of contract, **Accept** button	Not available
Renew assets under lease schedule	Detail of contract, **Renew** button	Not available
Buy out assets under lease schedule	Detail of contract, **Buy out** button	Not available
Return assets under lease schedule	Detail of contract, **Return** button	Not available

Desired action	Using the Windows client	Using the Web client
Add assets to a lease schedule	Contract detail, **Assets (leased)** tab, adding a link	Not available

Procurement

Desired action	Using the Windows client	Using the Web client
Display procurement tracking information	Request, estimate, PO, receiving slip or invoice detail, **Tracking** tab	Not available

Bar code

Desired action	Using the Windows client	Using the Web client
Print a catalog	**Portfolio/ Bar-code inventory** menu	Not available

Financials

Desired action	Using the Windows client	Using the Web client
Display preview of applicable taxes for a tax jurisdiction on a given date	**Finance/ Tax jurisdictions and rates** menu, **Preview** tab	Not available

Advanced functions

Desired action	Using the Windows client	Using the Web client
Manage time zones	The AssetCenter database server and the Windows clients can be installed on computers with different time zones.	The AssetCenter database server, the AssetCenter Web Tier server and the AssetCenter Web Service server must be installed on computers using the same time zone. Different time zones can be used for client stations.
Connect to the database using Windows 2000, XP, or Server 2003 integrated security	Available	Not available
Edit queries	**Tools/ Queries** menu	Not available

Desired action	Using the Windows client	Using the Web client
Edit calendars	**Tools/ Calendars** menu	Not available
Edit news	**Tools/ News** menu	Not available
Manage workflow tasks	**Tools/ Tasks in progress** menu	Not available
Display the list of database screens	**Administration/List of screens** menu	Not available
Select the **Preview** tab of the user profiles detail.	This tab displays the results of combining user rights with user profiles	Not available
Edit user rights	**Administration/ User rights** menu	Not available
Edit functional rights	**Administration/ Functional** rights menu	Not available
Edit database options	**Administration/ Database options** menu.	Not available
Edit workflow schemes	**Tools/ Workflow** menu	Not available
Edit connections	**File/ Manage connections** menu.	Not available
Import data	**File/ Import** menu	Not available
Modify a user's AssetCenter password	**Tools/ Change password** menu	Not available
Force password change for an AssetCenter user	1 Display a user's detail (**Portfolio/ Departments and employees** menu). 2 Changed the **Password** (Login-Password) field. 3 Check the **Force change** (bResetPwd) option. The next time the user connects to the database, a window will appear requesting that the user change the password.	Not available

8 Reference information

Connections

To create a connection to a database

1 Start the Windows client.

> **Warning:**
>
> This functionality is not available in the Web client.

2 Select the **File/ Manage connections** menu.
3 Click **New**.
4 Populate the **Connection** tab:
   1 Enter the connection **Name** that appears in the **Connect to a database** dialog box.
   2 You can use the **Description** field to briefly describe the connection.
   3 Select the database engine from the drop-down list in the **Engine** field.
5 Enter the information according to the engine that you selected.
   - ODBC **Data source**, which enables you to access a database (IBM Database Universal Server or Microsoft SQL Server).

- Oracle or Sybase SQL Server **Server** name, on which the database is stored.
- **Database** is the name of the ODBC connection (IBM Database Universal Server or Microsoft SQL Server) or the name of the database (Sybase SQL Server).
- **User** is the name of the Login that identifies you when you access the database (IBM Database Universal Server or Microsoft SQL Server).
- **Oracle account** name, used for the connection; it serves as a login.
- **Sybase account** name (Sybase SQL Server), used for the connection; it serves as a login.
- **Password**
- **Owner** of the database. Prefixes the SQL commands sent to the database.

6 Click **Create**.

You can create several connections to the same database if you assign each one a different name. The **New** or **Duplicate** buttons enable you to create these connections.

You can use the **Test** button to:

- Test the connection to the database.
- Check that the database is compatible with the current AssetCenter version.

Press the **Open** button to connect to the selected database. It is equivalent to selecting the **File/ Connect to database** menu.

```
SELECT Joe.a FROM Joe.b
```

To delete a connection to a database

This action does NOT destroy the database.

1 Start the Windows client.

> ⚠ **Warning:**
>
> This functionality is not available in the Web client.

2 Select the **File/ Manage connections** menu.
3 Select the connection to be deleted.
4 Click **Delete**.

Performance of AssetCenter

If you use AssetCenter on a low-speed network, some items (images in particular) might take awhile to be displayed.

To improve program performance, you can make a local copy of these large objects on the client workstation's local drive. This copy is called a "cache."

How it works

- Creating a cache amounts to creating a set of files in a local folder (directory).
- The software copies items as and when you call on them.
- Each time a large item is displayed (images, forms, database structure, etc.) the software looks to see if the element has been modified. If it hasn't, the software displays the item from the cache. If it has, the software updates the cache and displays the correct value.

To create a cache

Windows client

1 Use the **File/ Manage connections** menu to display the list of connections.
2 Select an existing connection, or create a new one.
3 In the **Cache** tab, select the **Enable disk cache** check box.
4 Use the ▣ for cache button to select the **Local folder for cache**.

> ⚠ **Warning:**
>
> The cache size must be between 1 MB and 20 MB. When your cache reaches the defined maximum size, AssetCenter erases the oldest items in the cache in order to add new ones, as required.

Actions

An action is an operation that calls on an external program from within AssetCenter.

Creating an action

Creating an action is reserved for advanced users.

▶ Creating actions is described in the *Actions* chapter of the *Advanced use* guide.

Executing an action

Windows client

You can execute an action in one of several ways:

- Clicking the ⬚ button on the toolbar:

  The drop-down list displays the names of the available actions that you can choose from. Clicking ⚙ launches the same action again. If this action still exists, the icon associated with it replaces the ⚙ button on the toolbar.
- Using the *Tools/ Actions* menu item.
- Select the name of an action on the navigation bar if the action is associated with a functional domain and if it is not contextual.
- A contextual action can be associated with a button that is present in a screen's detail. This allows the wizard to be triggered by clicking the button.

  For example: In the detail for an employee, a department can be created by clicking the **+ Department** button.
- From the preview of an action:
  1 Select the **Tools/ Actions/ Edit** menu to view the list of actions.

2 For an action whose **Context** field (SQL name: ContextTable) indicates a table of reference, click **Preview**.

3 In the window that appears, choose the **Context** of application of this action from among the records in this table proposed by the drop-down list.
4 Click **Execute**.

■ From the shortcut menu (accessible by right-clicking): If at least one action is available for the open table, the *Actions* entry is shown in the shortcut menu.

💡 Tip:

You may select several records in a list and apply an action to them.

Example

In this way, you can select several assets and send the same message to their users.

Web client

A non-contextual action can be triggered from the tree-structure navigation panel if the action is associated with a functional domain.

A contextual action is triggered by selecting the action from the **Contextual actions** drop-down list at the top of the list screens.

For example: In the orders list, receipt of an order is done by triggering the **Receive** action from the **Contextual actions** list.

Limitations using actions

▶ Actions (including wizards) [page 108].

Messages

The different users of AssetCenter can exchange messages with each other.

Read new messages

Windows client

You can access messages addressed to you in the list of messages accessible via the **Tools/ Messages** menu.

Web client

You can access messages addressed to you in the list of messages accessible via the **Administration/ System/ My Messages** menu.

Referenced object

Windows client

The **Referenced object** button enables you to directly access the record concerned by the message. For example, if the message indicates that a new purchase request has been submitted to you for validation, clicking the button enables you to directly access the request detail.

Web client

Functionality not available.

Test for new messages

Windows client

You are informed of any new messages at each test period, defined in the **Messages** option of the **Edit/ Options** menu item.

Upon connection to the database, if there are any unread messages - such as those received before your connection - a dialog box asks if you want to read them.

During the course of your session, if you receive new messages a dialog box is displayed asking you if want to read them.

Web client

After connecting to the database, if you have any unread messages you can click the link to read them.

A wizard will open when the user clicks the link to read the messages.

History

The history of changes made to the fields and links of an AssetCenter table can be tracked and recorded.

Configure change history

Windows client

1 Connect to the database.
2 Display the detail of a record from the table containing the field or the link for which the changed history is to be kept.
3 From the shortcut menu, select **Configure object**.
4 Select the **Keep history** field.
5 Set the field to *Yes* or *Script*.
6 Save the modifications (**OK** button).

Web client

Functionality not available.

AssetCenter Database Administrator

1 Connect to the database.
2 Display the detail of the table containing the field or the link for which the change history is to be kept.
3 Select the **Scripts** tab.
4 Select the **Keep history** field.
5 Set the field to *Yes* or *Script*.

6   Save the changes made to the table (**Modify** button).

7   Save the changes in the database (**File/ Save database structure** menu).

Delete, view or add history lines

History lines appear in the **History** tab of the record's detail.

As unorthodox as this method may be, it is also possible to add history lines manually by using the ⊞ button (Windows client) or the **Add** button (Web client).

Use the ⊟ (Windows client) or the **Delete** (Web client) button to delete history lines.

Use the ◩ button (Windows client) or click the history line (Web client) to view or modify a history line.

Alarms

Windows client

Alarms can be programmed for fields that have the alarm icon ◷ displayed to their right. Alarms launch actions in AssetCenter's table of actions.

Alarms are triggered when key dates approach. AssetCenter lets you use alarms for numerous operations.

In general, the actions triggered by alarms consist of sending messages to AssetCenter users that warn them of approaching deadlines (the end of a contract for example).

AssetCenter users can create alarms at 1 or 2 levels. Each alarm level defines a deadline and an action, which is triggered at this moment.

In the case of two-level alarms, triggering the second level depends on the first-level action.

- If the first-level alarm triggers an action other than the sending of a message via AssetCenter's internal messaging system (such as sending a message via a third-party messaging system), the second-level alarm will always be triggered at the defined moment.
- If the first-level alarm sends a message to a group of AssetCenter users via the internal messaging system, the action defined at the second level will not be triggered if one or more of the recipients has read the message.

Web client

Functionality not available.

Mouseless navigation

Windows client

▶ *Accessibility options* guide, chapter *Mouseless navigation*.

Web client

Please read your Internet browser's documentation for more information about navigating the Web client without a mouse.

Error messages

When an operation cannot be performed or when a problem occurs, AssetCenter displays an error message. Messages should be sufficiently clear for you to understand what caused the problem. For this reason they are not documented here.

Windows client

The error message window contains a **Save** button, which allows you to save the error message as a file.

You can also copy the error message to the Clipboard by clicking **Copy**.

Web client

You can copy error messages just as you would copy text from a Web page.

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