Product Documentation

Peregrine

AssetCenter

Differences between version 3.x and version 4.x

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Peregrine SYSTEMS

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CHAPTER 1 Expanded modules

- In version 3.x, AssetCenter is composed of six **modules**. Between these six modules, all levels asset management and asset tracking are handled.
- Version 4.x of AssetCenter still includes these **modules**, but now there are seven of them, and they have all been considerably expanded. Three of these modules now include a significant number of new functionalities, and an additional module has been added.

Table 1.1. Comparative presentation of the modules

Version 3.x	Version 4.x
Asset Management: Manages and tracks IT assets based on the Assets table.	**Portfolio**: Manages the full life cycle of assets such as furniture, real estate, supplies, accessories, etc. based on an organization of portfolio items and Asset tracking.
Procurement Management: Controls and tracks the procurement cycle, based on the products catalog.	**Procurement**: Manages the procurement cycle, based on an expanded repository and extensive catalog management. This catalog management can encompass multiple suppliers and clients and be integrated with external catalogs.
Cost Management: Controls expenses, based on the Budgets and Cost Centers tables. Tracks assets covered by contracts.	**Financials**: Controls costs and tracks cost categories for given budget periods. This also includes a chargeback system.

Leasing Management: Manages lease-type contracts.	**Contracts**: Comprehensively manages and tracks all types of contracts.
Administration: Enables you to customize certain fields and manage user profiles.	**Administration**: Enables you to customize certain fields, create database objects and manage user profiles.
	Cable and Circuit: This is the new specialized module in AssetCenter 4.0. It enables you to manage cable infrastructure, termination fields and connections between assets.

Using one or more modules always involves, at the least, a thorough analysis of how your information is organized and who is involved.

CHAPTER 2 New conception of the Portfolio module

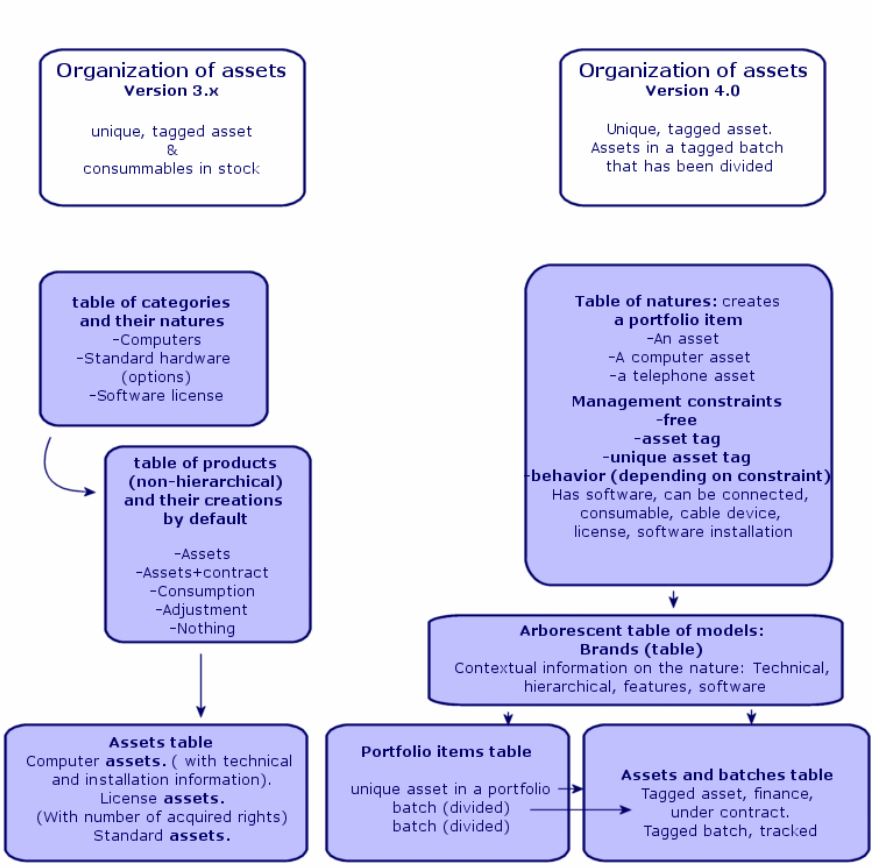
Both the **Asset management** (3.x) and **Portfolio** (4.x) modules enable you to precisely track your infrastructure, whether it be assets, contracts, work orders, trainings, etc.

However, because each category of **assets** has a different financial, technical, physical or commercial standing, the **Portfolio** module reorganizes this notion of **assets** in order to account for each difference.

New conception of products

- In AssetCenter 3.x, the **Products** catalog is a single catalog, which describes both internal references and supplier references as a link to the Companies table. Products are organized according to **categories** and their corresponding natures.

- AssetCenter 4.x now has two distinct management methods: Internal references - which are organized in a hierarchy - and **Models**, which rely on **natures** and **products** linked to **catalog references**.



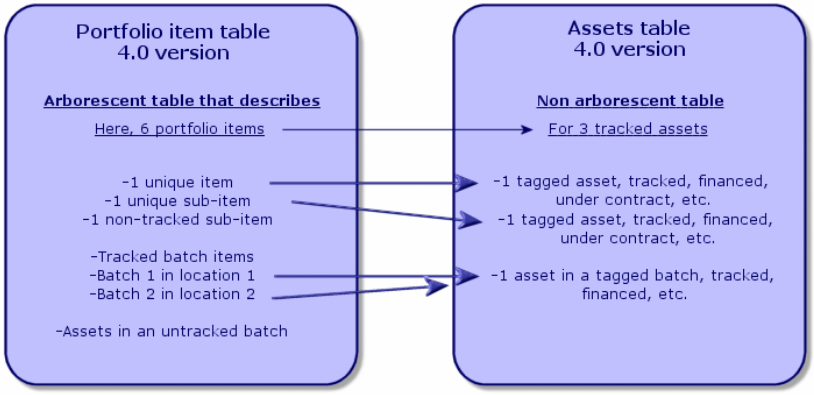
New conception of assets

- In AssetCenter 3.x, the **Assets** table contains unique items described by features and identified by asset tags and bar codes. These assets are financed and maintained using related contracts.
- To enable a more comprehensive management of assets, and to better handle the differences between them, AssetCenter 4.x offers a more precise

management method: An asset is a **unique item** or an item included in a **batch**. Depending on their importance, these items are either described in just the **Portfolio items** table as being inventoried assets with a specific location. Or they can be described not only in the first table, but also in the **Assets table**, which provides them with an asset tag and enables you to track these items financially, contractually and technically.

You can now manage your infrastructure from two standpoints, which allows you to divide the management roles:

A Portfolio manager can manage portfolio items as an inventory.	An Asset manager can deal with lifecycle management issues.
What hardware does this item use? What are its configurations? What quantity do I have of this item? How many units does it come in? Who are these items assigned to? Which stock are them items stored in? To which cost center do I charge this item?	What is this item's asset tag? Which serial number does this item have? How much does this item cost? What kind of contract covers this item? Which puchase order was used to procure this item? What is its corresponding invoice?



Main assets: Two tables

- In AssetCenter version 3.x, only **one table** - the **Assets** table - describes the assets of all **three types of natures** (defined by the category): Standard assets, computer assets, license assets.

- In AssetCenter 4.x, **two tables** compliment the **Assets** table in order to distinguish between and enhance the computer and telephone records: the **Computers** table and the **Telephones** table.

Computer and telephony assets require specific information to be managed and involve different people. This is why a **Telephones** table and a **Computers** table have been created in AssetCenter version 4.x.

Furthermore, these new tables enable you to import specific, external data.

Assets: summary

Whatever the version, an AssetCenter **asset** is still an **asset**, which is an item needing to be tracked and managed from its acquisition to its retirement.

AssetCenter 4.x proposes different approaches to the asset, depending on its importance and its nature.

These approaches answer many questions that were posed in the past:

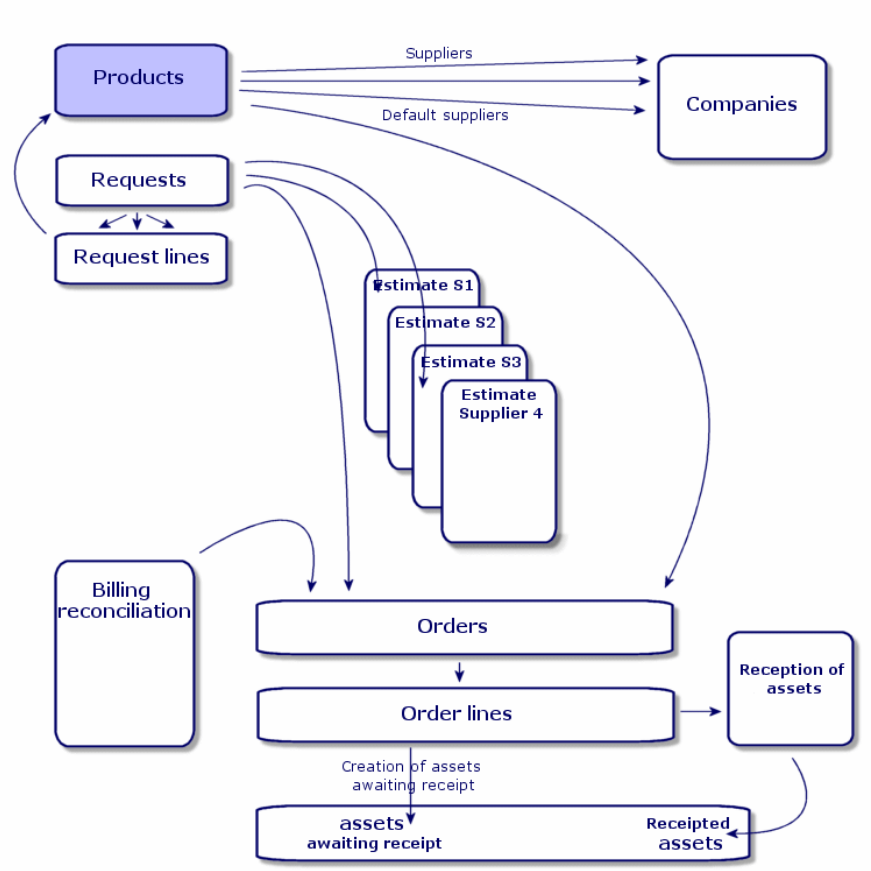
- What items do I want to manage in AssetCenter?
- Under what form do I want to manage these items: unit, quantity, configuration, options, consumables, etc.?
- What information is necessary to track these items?
- What is the most appropriate way to track these items?
- How and by whom will these items be modified and enhanced? Who manages what?
- What is the predetermined procurement cycle for obtaining new items?
- Etc.

This last question concerning the procurement cycle leads us to the second module: **Procurement**.

CHAPTER 3 New concepts of the Procurement module

- In AssetCenter version 3.x, the **procurement cycle** involves: Requests, Validation of requests by a workflow, Estimates, Orders, Possibility of creation while awaiting receipt, Receipt and reconciliation of invoices and order lines. You also have the ability to start the cycle from a request, an order or an estimate.
- In AssetCenter 4.x, the **procurement cycle** is fully linked to supplier catalog references. Requests are now expressed as internal needs. So instead of requesting products or supplies, you request **models**.

Figure 3.1. Simplified diagram of the procurement cycle (version 3.x)



The procurement cycle in AssetCenter 4.x is based on a living catalog of supplier product references. The catalog is maintained dynamically and extensively and can include information such as bulk discounts and can even handle different units. In order to handle such information, we have defined a set of functions to enable integration with external tools (Get-Resources, etc.).

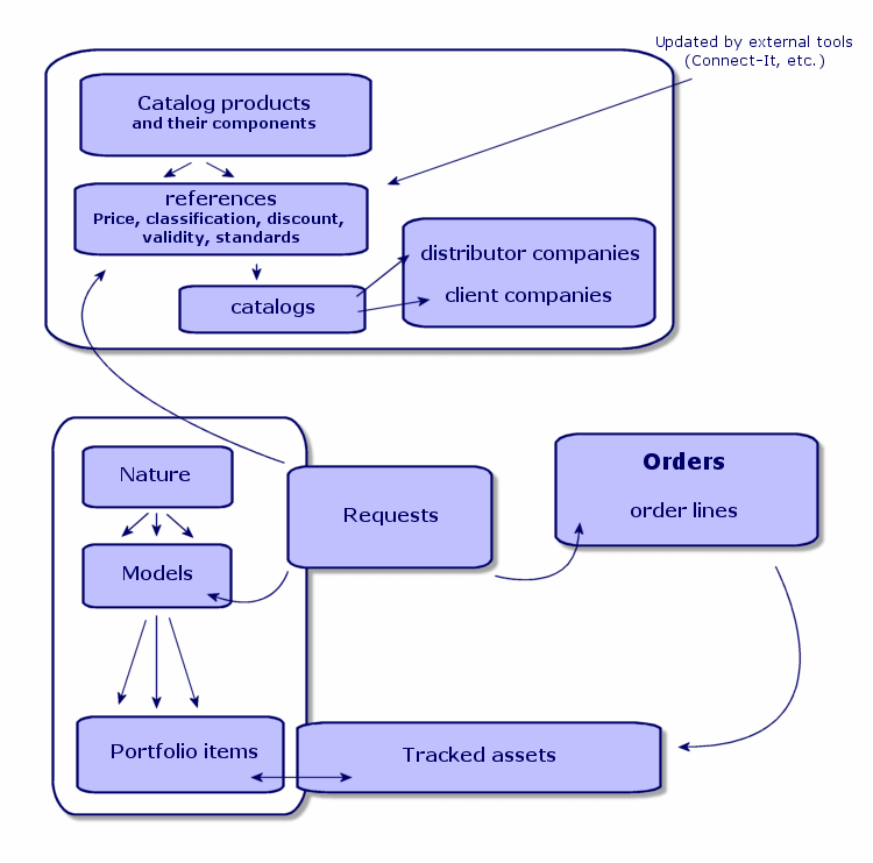
Now, purchase orders can be specified and refined in terms of reference products and up-to-date supplier offers.

To properly use the procurement cycle, we recommend that you follow all steps in the order we have defined.

- Purchase orders **should not** be issued without having first made a purchase request, as is the case in versions 3.x.

- **"Estimates" in versions 3.x are managed as "purchase orders"** in version 4.x; their "status" is set to "Quote requested".

Figure 3.2. Simplified diagram of the procurement cycle (version 4.x)



This diagram shows the three possible management methods:

- Purchasers, or those with information on supply references or in charge of issuing purchase orders.
- Portfolio managers, or those in charge of managing inventory, stock, quantities and their assignment location.
- Asset managers, or those in charge of important assets and of their cost, financial tracking and contracts.

Internal requests

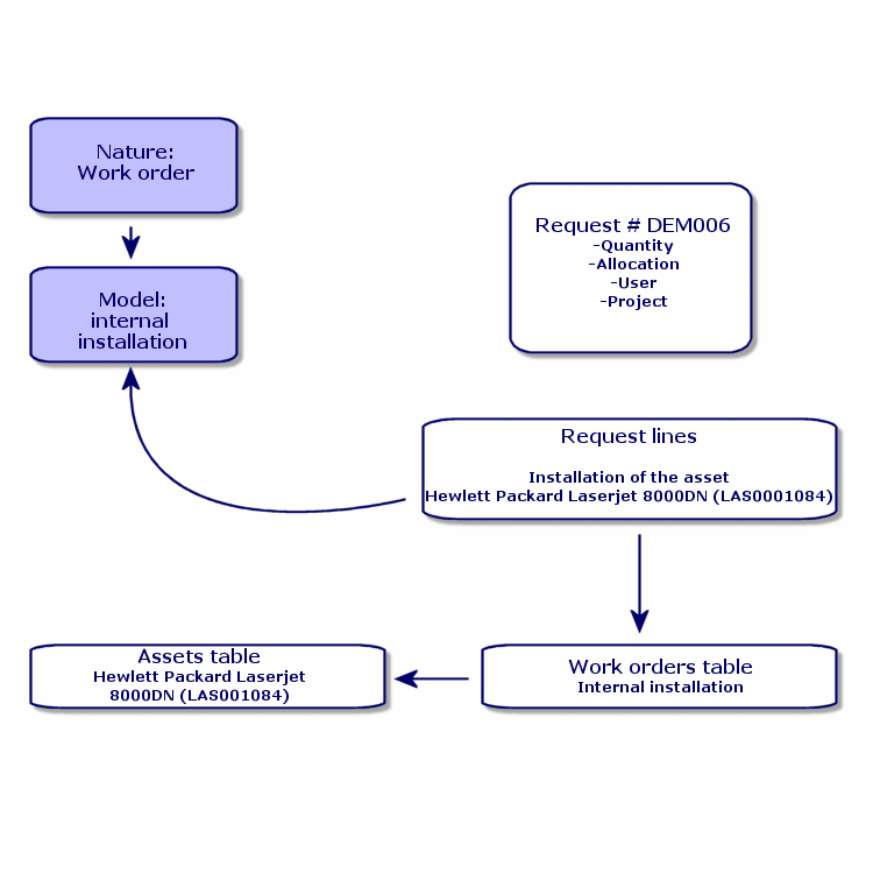
- In AssetCenter 3.x, requests can only be performed using the **Procurement** module.
- In AssetCenter 4.x, requests are removed from the context of catalogs and supplies, and **internal requests** can now be made without the **Procurement** module.

However, internal requests are not a small-scale version of the **Procurement** module, because they are not backed up by purchase orders or receipts.

They enable you to define requests with a **work order** nature, which are based on **models** with the same nature. These requests involve a number of links, such as the requester, the project, the cost center, etc.

Executing this request generates an object in the corresponding table.

Figure 3.3. Example diagram of an internal request



CHAPTER 4 Licenses and software installations

- AssetCenter 3.x describes installed computers and licenses in the following tables: **Licenses** are described in the **Assets** table (the "single/multiple" type enables you to manage the number of acquired rights). **Computers** are described in the **Assets** table with unique asset tags. **Software** is described in the **Software directory** table (populated by an external inventory tool, such as IDD). Installed software is described in the **Software installations** table as a **link** between the computer and the software. **Counters** are described in the **Counters** table and are used to reconcile the number of acquired rights and actual installations.

Note:

This form of management does not enable a global, graphical representation of all the components of the computer: Its corresponding sub-assets can only be hardware or licenses, but installations are only visible in another tab.

- AssetCenter 4.x makes this graphical representation possible through the organization of portfolio items. **Computers** are described as **portfolio items** and as computer assets.
  - **Licenses** are described as **portfolio items**, which are components of computers; the single/multiple type enables acquired rights to be managed.
  - **Software installations** are described as **portfolio items**, which are components of computers.

- **Counters** are described in the **Counters** table and are used to reconcile the number of acquired rights and corresponding installations.

Figure 4.1. Simplified diagram of software management (3.x)

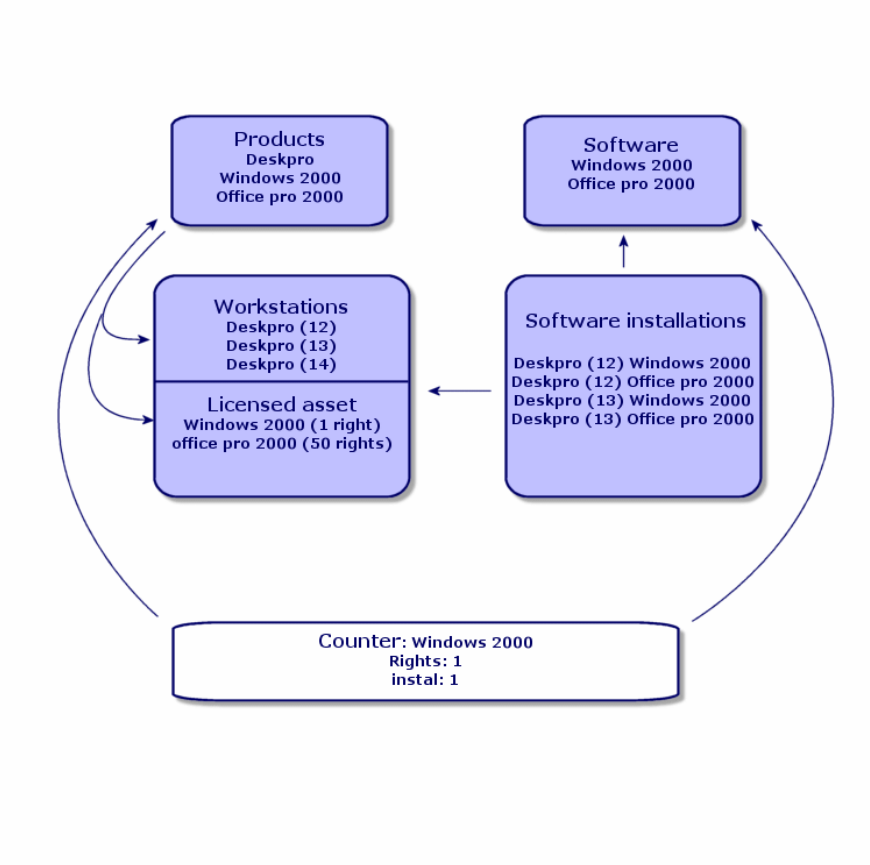
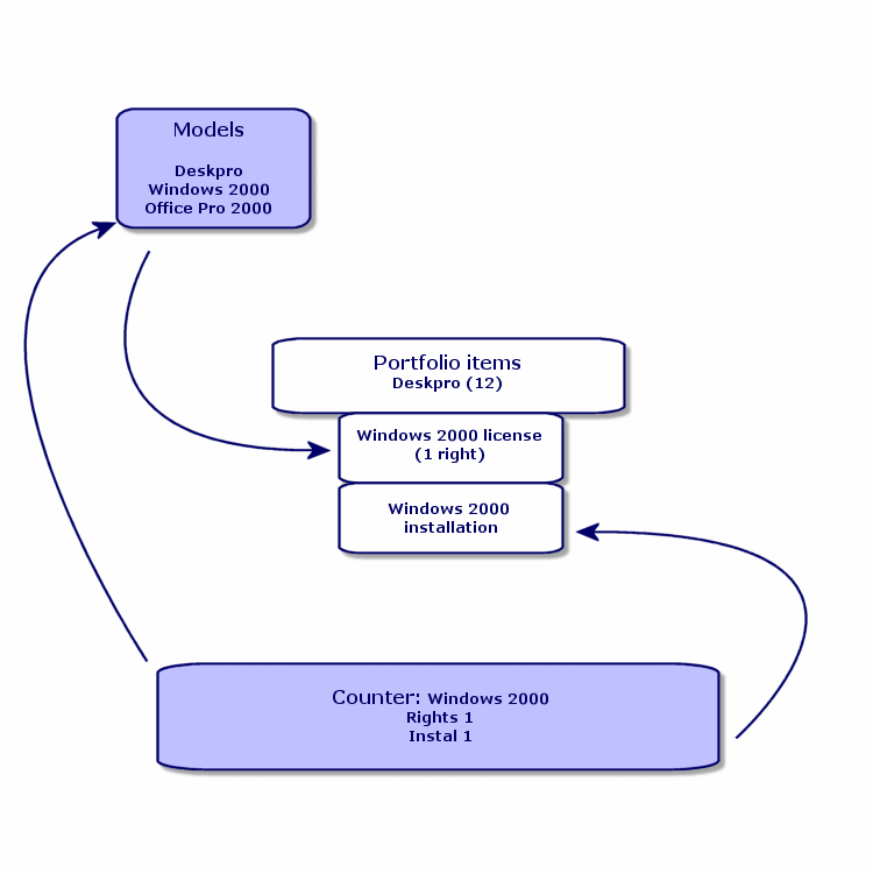


Figure 4.2. Simplified diagram of software management (4.x)



CHAPTER 5 Financials module

- The **Cost management** module in version 3.x enables you to manage expenses using **budgets** and **cost centers**.
- The **Financials** module in version 4.x enables you to manage expenses even more precisely. It is based on budget **periods** and budget **categories**.

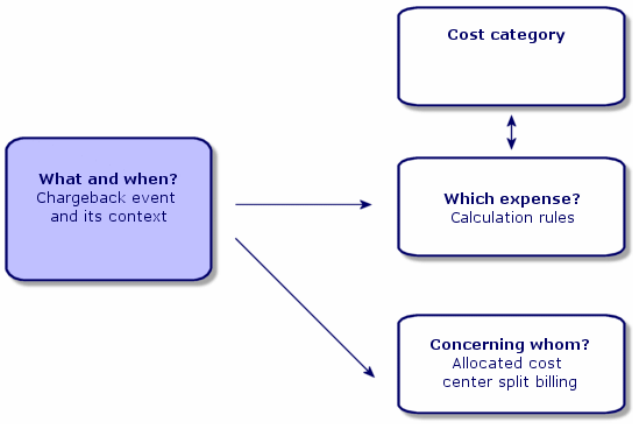
Chargeback

AssetCenter 4.x includes extensive chargeback functionality and enables you to implement your own business rules.

A chargeback system involves:

- Defining procedures and rules.

- Defining input events.



CHAPTER 6 A functional environment: Administration

The **Administration** module of AssetCenter 3.x:

- User customizations are saved locally in **.ini files**.

  Customizing the database consists of customizing the following fields:

  - Name
  - Type
  - Mandatory
  - Read only
  - Keep history
  - Default value

Customizing a user consists of associating them a profile, which is linked to user rights for table and optional access restrictions on certain records.

The **Administration** module of AssetCenter 4.x:

- User customizations are saved in a **database table**: amSysConfig.

  Customizing the database enables you to create new objects (tables, fields, etc.).

  Customizing the database consists of customizing the following fields:

  - Name
  - Type
  - Mandatory
  - Read only

- Keep history
- Default value
- Irrelevance

Customizing a user consists of assigning them a **profile**. This profile is linked to **user rights** on tables with optional access restrictions on certain records. In addition to this, profiles are also associated with **functional rights**.

User configuration (amSysConfig)
Administrator-level customization: new tables, new fields, action, etc.
System: Non-modifiable objects (tables, screens, actions, etc.)

CHAPTER 7

New module: Cable and Circuit

The **Cable and Circuit** module requires technical knowledge in the following areas:

- Cable system design
- Cabling techniques
- Cable hardware
- Cabling standards

This module enables you to:

- Maintain a detailed, physical inventory of cables and cable devices.
- Verify the integrity of circuits.
- Create projects and work orders to run and move cables.
- Define cabling best practices to harmonize cable connection modes.

CHAPTER 8 New tables

Version 4.x	New tables
amAbsence	Absences
amActionMemo	Actions memo
amBrand	Product brands
amBudgCenter	Budget centers
amBudgClass	Budget classifications
amBudgetCategory	Budget categories
amBudgLine	Budget lines
amCabCnxType	Cable connection types
amCable	Cables
amCableBundle	Cable bundles
amCableDuty	Cable duties
amCableLink	Links
amCablePair	Cable pairs/conductors
amCabPairType	Pair/Conductor types
amCatalog	Catalogs
amCatProduct	Products
amCatRef	Catalog references
amCatRefScript	Catalog reference scripts
amCatScriptData	Formatted data from catalogs
amCbkInvLine	Internal invoice lines
amCbkInvoice	Internal invoices
amCbkLine	Chargeback lines
amCbkRule	Chargeback rules

Version 4.x	New tables
amCbkScript	Chargeback scripts
amCbkSplitLine	Split-billing lines
amCbkSplitRule	Split-billing rules
amCbkStoredEvent	Chargeback events
amCbkSystem	Chargeback systems
amCFAql	AQL-type calculated field scripts
amCFScript	Script-type calculated field scripts
amCnxPinMap	Connection pin mappings
amColorCode	Color codes
amColorDet	Color code entries
amComputer	Computers
amCostCategory	Cost categories
amCountry	Countries
amDevicePin	Pins
amDocBlob	Contents of the documents
amFinancialYear	Financial years
amFuncRight	Functional rights
amFVBudgCenter	Features (Budget centers)
amFVBudgLine	Features (Budget lines)
amFVCable	Features (Cables)
amFVCableBundle	Features (Cable bundles)
amFVCableDuty	Features (Cable duties)
amFVCableLink	Features (Links)
amFVCablePair	Features (Cable pairs/conductors)
amFVCabPairType	Features (Pair/Conductor types)
amFVCatalog	Features (Catalogs)
amFVCatProduct	Features (Products)
amFVCatRef	Features (Catalog references)
amFVCbkInvoice	Features (Internal invoices)
amFVCbkLine	Features (Chargeback lines)
amFVCbkRule	Features (Chargeback rules)
amFVCbkSystem	Features (Chargeback systems)
amFVColorCode	Features (Color codes)
amFVColorDet	Features (Color code entries)
amFVComputer	Features (Computers)
amFVCostCategory	Features (Cost categories)
amFVDevicePin	Features (Pins)
amFVIftCpuUsrRgt	Features (Manager-group rights)
amFVIftGroupAlias	Features (Recipient groups)
amFVIftRight	Features (Elementary InfraTools rights)
amFVModel	Features (Models)
amFVModelPair	Features (Cable model pairs/conductors)

Version 4.x	New tables
amFVModelPort	Features (Model ports)
amFVModelSlot	Features (Model slots)
amFVPeriod	Features (Periods)
amFVPortfolio	Features (Portfolio items)
amFVProdOption	Features (Product options)
amFVProjCable	Features (Cables concerned by the project)
amFVProjTraceOut	Features (Traces concerned by the project)
amFVReceipt	Features (Receiving slips)
amFVReceiptLine	Features (Receipt lines)
amFVReservation	Features (Reservations)
amFVSlot	Features (Slots)
amFVSlotType	Features (Slot types)
amFVTermField	Features (Termination fields)
amFVTermFldCfgDuty	Features (Termination field configuration duties)
amFVTermFldCfgRole	Features (Termination field configuration roles and devices)
amFVTermFldConfig	Features (Termination field configurations)
amFVTermFldDevice	Features (Termination field devices)
amFVTopoGroupDet	Features (Topologies in a group)
amFVTopology	Features (Topologies)
amFVTopologyDet	Features (Topology steps)
amFVTopologyGroup	Features (Topology groups)
amFVTraceHistory	Features (Trace histories)
amFVTraceOp	Features (Trace operations)
amFVTraceOutput	Features (Trace outputs)
amFYDivision	Time division
amIftAgent	Agents
amIftCpuUsrRgt	Manager-group rights
amIftEventLog	Event log
amIftGroupAlias	Recipient groups
amIftRelGroupAlias	Group/computer link
amIftRight	Elementary InfraTools rights
amLabelRule	Label rules
amModel	Models
amModelPair	Cable model pairs/conductors
amModelPort	Model ports
amModelSlot	Model slots
amModelSoftInfo	Installations to create
amNature	Natures
amPCard	Payment cards
amPCardType	Types of payment cards

Version 4.x	New tables
amPeriod	Periods
amPhone	Telephones
amPhoneFeat	Telephone functions
amPhoneFeatTemplate	Telephone function templates
amPKFT	Assignments of functions to keys
amPortfolio	Portfolio items
amProdClassCode	Classification codes
amProdOption	Product options
amProjCable	Cables concerned by the project
amProjTraceOut	Traces concerned by the project
amReceipt	Receiving slips
amReceiptLine	Receipt lines
amRelCatalogClients	Catalogs - Customer companies relation
amRelCatalogSuppliers	Catalogs - Distributor companies relation
amRelCCatClass	Cost categories-Budget classifications relation
amRelFRProfile	Functional rights associated with profiles
amRelModelCompat	Compatibility between models
amRelPOrdReq	Requests/Estimates links
amRelSlotTypeModel	Models - Slot types relation
amRelSuppPCardType	Supplier/Payment card type link
amRelTermLoc	Locations - Termination fields relation
amReservation	Reservations
amScriptLibrary	Scripts
amSlot	Slots
amSlotType	Slot types
amSysConfig	Configurations and preferences
amTermField	Termination fields
amTermFldCfgDuty	Termination field configuration duties
amTermFldCfgRole	Termination field configuration roles and devices
amTermFldConfig	Termination field configurations
amTermFldDevice	Termination field devices
amTopoGroupDet	Topologies in a group
amTopology	Topologies
amTopologyDet	Topology steps
amTopologyGroup	Topology groups
amTraceHistory	Trace histories
amTraceOp	Trace operations
amTraceOutput	Trace outputs
amUnit	Units

Version 4.x	New tables
amWkEvtScript	Workflow event scripts

Version 3.x	Removed tables
amCategory	**Categories**
amProduct	**Products**
amProdSupp	**Product suppliers**
amFamily	Product families
amRelProdCompat	Product compatibility
amConsUse	**Consumptions**
amProdCompo	Composition of products
amProdPort	Product port
amProdReserv	Product reservation
amProdSoftInfo	Installation to create
amProdStockLine	Stock line
amEstimate	Estimates
amEstimLine	Estimate lines
amItemReturned	Objects returned
amPOrdRetLine	Order return lines
amFVCategory	Features (Categories)
amFVConsUse	Features (Consumptions)
amFVEstimate	Features (Estimates)
amFVEstimLine	Features (Estimate lines)
amFVPOrdRetLine	Features (Order return lines)
amFVProdCompo	Features (Composition of products)
amFVProdPort	Features (Product port)
amFVProdReserv	Features (Product reservation)
amFVProdStockLine	Features (Stock line)
amFVProdSupp	Features (Product suppliers)
amFVProduct	Features (Products)
amFVSoftware	Features (Software)
amRelEstimReq	Requests/Estimates links
amSoftware	Software
amDeliv	Receiving slips
amDelivLine	Receipt lines

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