

Peregrine

AssetCenter



Using AssetCenter Web

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AssetCenter

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Foreword

About AssetCenter Web

AssetCenter Web enables Web-based access to the AssetCenter database to all users without having to install the AssetCenter client.

Depending on their access rights, a user can perform different operations on the AssetCenter database. Both simple operations, such as browsing assets, and complex operations such as adding or deleting assets are possible.

AssetCenter Web has the following advantages:

- AssetCenter Web generates the pages to be displayed in real time. The pages displayed at any given moment correspond exactly to live data from the AssetCenter database.
- AssetCenter Web verifies the rights of users of AssetCenter Web when they access the AssetCenter database.

About the guide

This manual describes how to use AssetCenter Web.

Intended audience

This manual is intended for AssetCenter Web users and for the administrator of access rights to AssetCenter.

Additional documentation

For further information, you may consult the following documentation:

- **Installation Guide**
- **Administration Guide**
- The AssetCenter Web **Release Notes**: Late breaking information and known issues are documented here.

Additional applications

This guide does not contain information on the functioning of AssetCenter. This information is included in the AssetCenter documentation.

Typographic conventions

The following notational conventions are used throughout this manual:

| Convention | Description |
|--|---|
| Code | Example of code or command |
| Fixed width characters | DOS command, function parameter or data formatting. |
| ... | Portion of code or command omitted. |
| Note: Additional information | Note for informational purposes. |
| Important: Be careful... | Important information for the user. |
| Tip: A tip on using... | Tip. |
| Warning: Warning | Important information for the user. |
| Object | Graphical interface object: a menu, a menu item, a tab or a button. |

The following conventions are also used:

- Steps to perform in a given order are presented in a numbered list. For example:
 - 1 First step

- 2 Second step
 - 3 Third and last step
- All figures and tables are numbered according to the chapter in which they are found and the order in which they are presented. For example, the title of the fourth table in chapter two will be: **Table 2-4**.

Technical support

If case of need, you can contact Peregrine Systems technical support.

To contact technical support:

- 1 Start a Web browser.
- 2 Enter the following URL:

```
http://support.peregrine.com
```

- 3 Log on using your user name and password.
- 4 Follow the instructions given by the site.
Start by searching in the knowledge base.
It contains articles on all Peregrine products.
- 5 If the knowledge base does not provide the adequate response, try looking in the description of AssetCenter, news groups or in the list of available downloads.

Documentation Web site

For the most up-to-date list of documentation for AssetCenter Web, refer to the documentation page on the technical support Web site.

To display the documentation list:

- 1 Start a Web browser.
- 2 Enter the following URL:

```
http://support.peregrine.com
```

- 3 Log on using your user name and password.

These files in PDF format can be read using Adobe Acrobat Reader.

This can be downloaded using the link on the Peregrine technical support site or from Adobe at the following address:

```
http://www.adobe.com
```

 **Important:**

The Release Notes are updated regularly.
Make sure you have the most up to date version.

Training

Peregrine provides a complete range of education services: Classroom-based training, Web training, virtual classes.

For further information, you can connect to the following address:

<http://www.peregrine.com/education>



1 Operating Principles

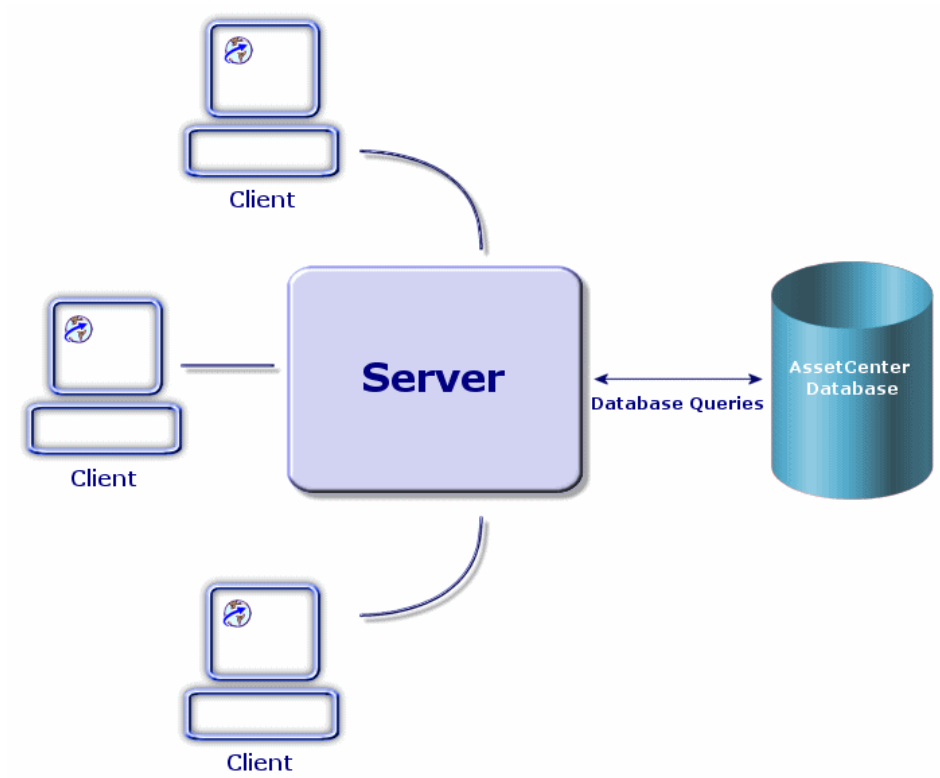
CHAPTER

AssetCenter Web enables any user to access the AssetCenter database via Internet Explorer.

The user does not need to install an AssetCenter Windows client.

AssetCenter Web is hosted by a Java applications server and is comprised of the OAA (Open Application Architecture) platform and AssetCenter Web pages.

Figure 1.1. AssetCenter Web - Overview



2 | User access rights

CHAPTER

This chapter explains how the administrator defines what a user can access via AssetCenter Web.

Setting user rights

Rights are defined at several levels:

Defining AssetCenter Web pages that can be viewed by all users

- 1 Start the AssetCenter Web administration module. The user name is **System** (password is empty by default):

```
http://<host>:<port>/oaa/admin.jsp
```

- 2 Select the **Settings** menu.
- 3 Select the **AssetCenter** tab.
- 4 Select the **Default Capability Words** parameter.
- 5 Indicate the list of rights.

Syntax:

```
ac(<right 1>;<right 2>;...;<right n>)
```

Example:

```
ac(acw.portfolio;acw.contract;acw.finance;acw.system)
```

To learn the list of rights, refer to the section [List of AssetCenter Web access rights](#) [page 18].



Note:

Rights grant access to the pages accessible from the main menu or using the links to these pages (from whatever page on which these links are located).

Defining AssetCenter Web pages visible for a given user

- 1 Start AssetCenter.
- 2 Display the list of user rights via the **Administration/ User rights** menu.
- 3 If they do not exist, create the **acw.*** rights.
To learn the list of available rights: ► [List of AssetCenter Web access rights](#) [page 18].
At this stage, only the name of the rights counts; you can define the read rights, entry rights creation rights and destruction rights later.
- 4 Close the list of user rights by clicking **Close**.
- 5 Display the list of user profiles via the **Administration/ User profiles** menu.
- 6 Create a new profile or select an existing one.
- 7 Select the **User rights** tab.
- 8 Add the appropriate **acw.*** rights.
- 9 Save this information via the **Create** or **Modify** buttons.
- 10 Close the list of user profiles by clicking **Close**.
- 11 Display the list of employees via the **Portfolio/ Departments and Employees** menu.
- 12 Select the person to whom you want to assign the access profile you just created.
- 13 Select the **Profile** tab.
- 14 Populate the **Profile** link by selecting the access profile that you just defined.
- 15 Close the list of employees by clicking **Close**.

If the **acw.*** rights are not in your AssetCenter database (if it originates from a version prior to 4.4), you can import the user rights and the standard access profiles.

For this:

- 1 Start AssetCenter.
- 2 Connect to your database with administrative rights.
- 3 Select **File/ Import/ Execute a script**.
- 4 Select the script **profile.scr**.

By default, this script is located in the folder **C:\Program Files\Peregrine\AssetCenter\datakit\acw**.

- 5 Click **Import**.

The names of the AssetCenter Web profiles are prefixed with **AssetCenter Web profile**.

Defining AssetCenter database data that can be viewed and modified by a given user

- 1 Start AssetCenter.
- 2 Display the list of employees via the **Portfolio/ Departments and Employees** menu.
- 3 Select the employee to whom you want to give access to the AssetCenter database.
- 4 Select the **Profile** tab.
- 5 Display the detail of the profile associated to the employee by clicking the magnifying glass to the right of the **Profile** link.
- 6 Define the profile completely (particularly the user rights and the access restrictions).

For the access rights, you must define the read rights, entry rights, creation rights and destruction rights.


You can use the general rights or the **acw.*** rights that were designed for the display of the AssetCenter Web pages.

- 7 Save these modifications by clicking **Modify**.

List of AssetCenter Web access rights

Table 2.1. Settings - List of access rights

| Name of the access right | Corresponding module | Authorized pages |
|--|--|---|
| acw.acw | When this right is selected, the AssetCenter icon appears in AssetCenter Web's Welcome tab. | |
| | Note: | |
| | The user will still be able to access AssetCenter by clicking the AssetCenter tab. | |
| acw.cable | Cable | All pages of the module. |
| acw.contract | Contracts | All pages of the module. |
| acw.finance | Finance | All pages of the module. |
| acw.portfolio | Portfolio | <ul style="list-style-type: none"> ■ Portfolio elements ■ Batches ■ Computers ■ Telephones ■ Projects |
| acw.portfolio + acw.portfolio.technician | Portfolio items | Pages authorized by the acw.portfolio right, plus: <ul style="list-style-type: none"> ◆ My work orders |
| acw.portfolio + acw.portfolio.manager | Portfolio item | Pages authorized by the acw.portfolio right, plus: <ul style="list-style-type: none"> ◆ Work orders |
| acw.system | General | <ul style="list-style-type: none"> ■ Companies ■ Contacts ■ Departments ■ Employees ■ Groups ■ Locations ■ Stocks ■ My Messages |
| acw.system + acw.system.mytasks | General | Pages authorized by the acw.system right, plus: <ul style="list-style-type: none"> ◆ My tasks in progress |

| Name of the access right | Corresponding module | Authorized pages |
|---------------------------------|----------------------|--|
| acw.reconc | Reconciliation | Reconciliation proposals assigned to the assignee connected to AssetCenter Web. |
| acw.reconc + acw.reconc.manager | Reconciliation | All reconciliation proposals. |
| getit.personalization.admin | | <p>This right is only taken into account if the End user personalization option (Common tab), Personalization section) is set to Disabled (defined using the AssetCenter Web administration module).</p> <p>In this case, this right enables customization of all parameters of pages in AssetCenter Web using the  icon.</p> |



3 Utilization

CHAPTER

This chapter provides AssetCenter Web users information on:

- How to use AssetCenter Web.
- How to modify the appearance of pages.

General interface

Connecting to AssetCenter Web

To connect to AssetCenter Web:

- 1 Enter the following URL in your browser.

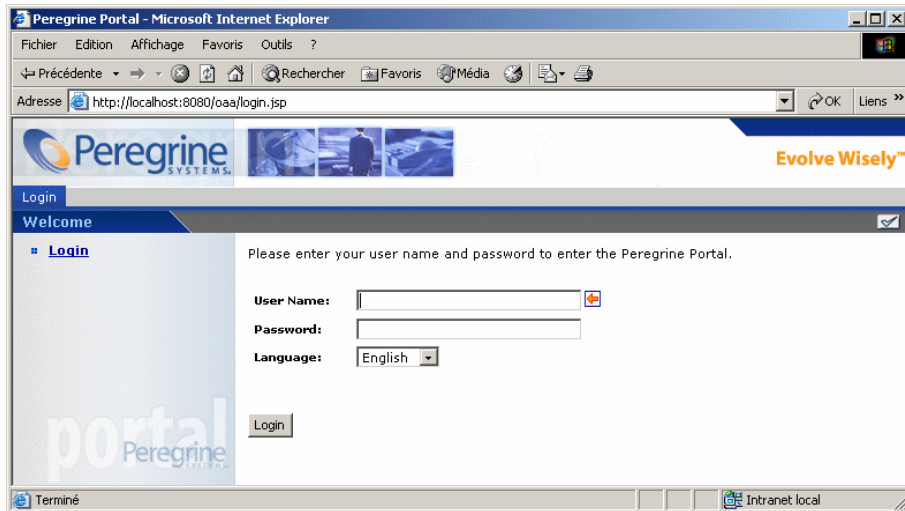
```
http://<host>:<port>/oaa/login.jsp
```

host: name of the AssetCenter Web server.

port: Port number. Optional if port number is **80**.

- 2 The AssetCenter Web home page appears in your browser.

Figure 3.1. AssetCenter Web - Home page



3 Populate the fields and then click **Login**.



Tip:

Note for administrators:

If you have selected this option, AssetCenter is installed with a demonstration database.

This demonstration database includes data spanning most tables and is intended to help you in testing AssetCenter Web.

The user **Richard Hartke** is associated with the **Full AssetCenter Web profile**, thus giving him access to all AssetCenter Web pages and the corresponding data in the AssetCenter database.

His user name is **Hartke**; The associated password is empty.

Tabs

Several tabs are displayed in the top part of the screen:

- **Home:** Enables customization of the home page and certain general parameters at the user computer level.
- **AssetCenter:** Enables access to the screens in the AssetCenter modules.

Icons

Table 3.1. Toolbar icons








| Icon | Function |
|---|--|
|  | This icon ends your AssetCenter Web work session. |
|  | This icon enables you to trigger an action that depends on the context in which the icon is displayed. The ToolTip that is displayed when the pointer is left over the icon tells you exactly which action is triggered. |
|  | This icon enables you to customize the current page at the user computer level. |
|  | This icon enables you to automatically translate data from the AssetCenter database. |

Table 3.2. Page icons

| Icon | Function |
|---|---|
|  | Displays the list of records among which you will make your choice. |
|  | Deletes the contents of a field. |
|  | Displays a graphic calendar that enables you to select a date. |

Disconnect

To disconnect, simply click  in the AssetCenter Web toolbar.

Example using AssetCenter Web

This section enables you to discover the AssetCenter Web interface via a practical example.

Before you begin the practical example, the administrator needs to install the AssetCenter demonstration database and provide you with its URL.

- 1 Launch Internet Explorer.
- 2 Enter the URL to access the demonstration database.

Example:

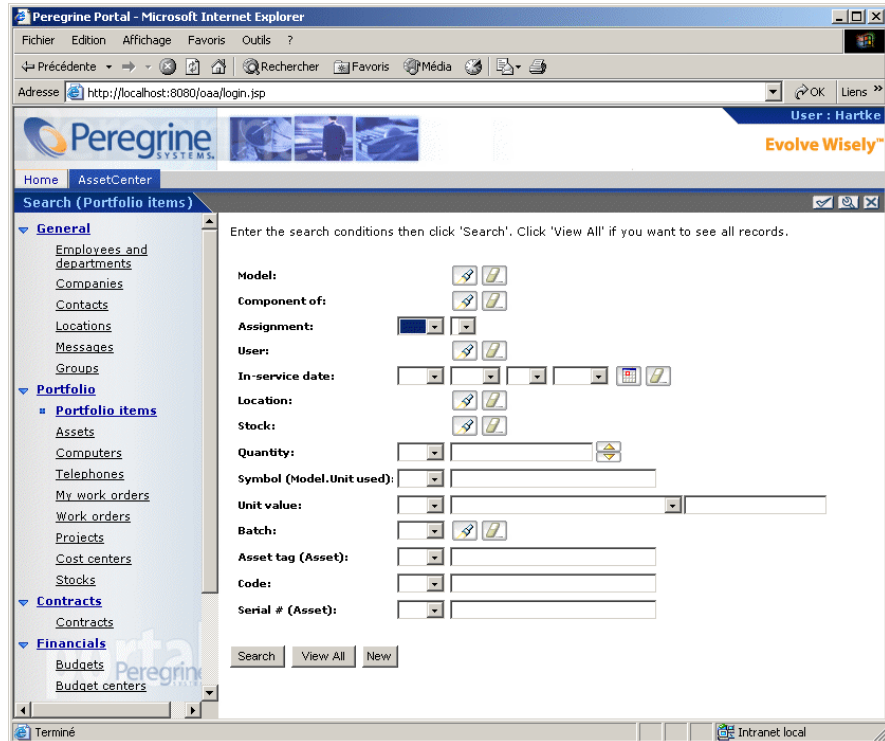
```
http://<serveur>:<port>/oaa/login.jsp
```

- 3 On the connection page, enter the following information:

| Field name | Information to enter |
|------------|---|
| User name | Hartke |
| Password | Leave this field empty |
| Language | Select the language to use for the AssetCenter Web pages. |

- 4 Click the **AssetCenter** tab and then the **Portfolio items** entry in the left pane.

Figure 3.2. AssetCenter Web - Searching for a portfolio item



- 5 This page enables you to search for a portfolio item depending on certain criteria such as:

- Model
 - Component of
 - Assignment
 - User
 - Location
 - Stock
 - Asset tag
- 6 Next, click the **Search** button.
- If the fields are empty, all portfolio items will be displayed.

Figure 3.3. AssetCenter Web - List of portfolio items

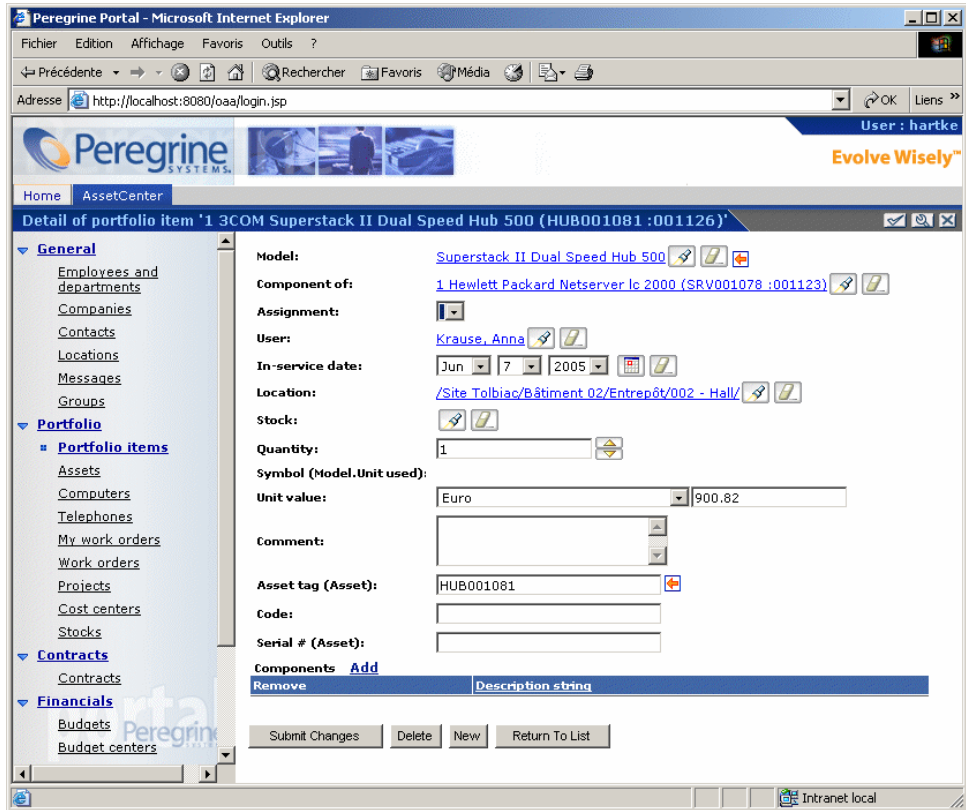
Click a record to see its details.

| Model | Quantity | Symbol (Model,Unit used) |
|--|----------|--------------------------|
| Superstack II Dual Speed Hub 500 | 1 | |
| Superstack II Dual Speed Hub 500 | 1 | |
| Superstack II Dual Speed Hub 500 | 1 | |
| Superstack II Dual Speed Hub 500 | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |
| Fast Etherlink XI 10/100 PCI TX | 1 | |

New Search New

- 7 You can now click the portfolio item of your choice to display its detail. For example, select the value **Superstack II Dual Speed Hub 500** in the **Model** column. The detail of the selected portfolio item is displayed.

Figure 3.4. AssetCenter Web - Detail of a portfolio item



Displayed data

Here is some information on the data processed and displayed by AssetCenter Web.

Live data

The data displayed is identical to the data contained in the AssetCenter database: AssetCenter Web dynamically generates HTML pages so that they contain the most up-to-date data, which reflects the actual situation in the database.

As far as the user is concerned, everything functions exactly as if the AssetCenter database was being accessed via an AssetCenter Windows client.

 **Note:**

After being displayed a certain amount of time, the data might become obsolete due to changes in the database. In order to update it, you need to click the Refresh button of the browser that you are using.

Secure data

Users can only view data to which they have been granted access. These rights are created and assigned to them by the administrator.

Customizing AssetCenter Web pages


This section explains how to modify the way AssetCenter Web pages are displayed.





 **Note:**

Any customizations made in this way are saved at the server level and are valid for all AssetCenter Web users.

Adding a field, link or a section title to an existing page



To add a field, a link or a section title to an existing page:

- 1 Display the page containing the field, link or section title to be customized.
- 2 Click  on the toolbar.

- 3 In the configuration window, select the field, link or "Section Title" in the **Available Fields** list.
- 4 Click  or  between the two lists, or double-click the field, link or section title.
The item is added at the end of the **Current Configuration** list.
You can move the items in the **Current Configuration** list using the  and  icons.
- 5 Click **Save**.

Modifying the attributes of a field, link or section title

To modify the attributes of a field, link or section title:

- 1 Display the page containing the field, link or section title to be customized.
- 2 Click  on the toolbar.
- 3 In the configuration window, select the field, link or section title in the **Current Configuration** list.
- 4 Click  to the right of the **Current Configuration** list or double-click the field, link or section title.
- 5 In the second configuration window, modify the attributes of your choice.
- 6 Click **Save**.



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