Asset Manager

Software Version: 9.61

Windows® and Linux® operating systems

User Interface

Hewlett Packard
Enterprise

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Contents

Chapter 1: Introduction

This chapter includes:

What is in this guide?

This guide's objective is to familiarize you with Asset Manager. 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.

Who is this guide for?

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

Chapter 2: Welcome to Asset Manager

This chapter includes:

Asset Manager is a complete IT management system, comprising several modules that are totally integrated and share a common repository. Asset Manager enables you to manage your portfolio and the events associated with the lifecycle of the items in your portfolio: Procurement, cost management (tax, TCO, maintenance contracts, work orders, and so on).

Because Asset Manager is an "integrated" application, you can access all its functions from the same interface and work on a single database. This advantage avoids duplicate information. Because it is a "functional" application, you can adapt its interface to your own needs by selecting only the functions you want to access. The interface is thus much simpler to use.

Note: The list of available Asset Manager software modules and the functionality they provide depends on the license rights you have acquired from HPE.

A user can access the Asset Manager 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 introduces the software and certain essential concepts that will enable you to familiarize yourself quickly and effectively with Asset Manager's GUI.

Introduction to the database

Asset Manager is used in conjunction with a database. The Asset Manager 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 Asset Manager user guides.

This section includes:

Definition of a database

A database is an entity that stores data in a structured manner and with as little redundancy as possible. This data is used by programs (in our case, Asset Manager) 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 named a distributed database. Its main advantage is that it enables several users to access the stored information simultaneously (or concurrently).
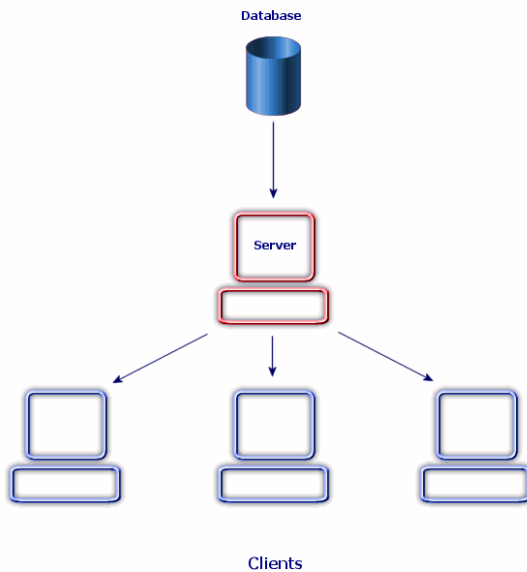
Definition of a database management system

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.

Asset Manager 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:
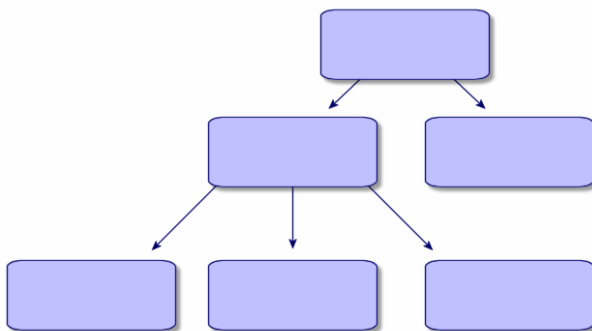
The relational model

In this model, data is organized in two-dimensional tables (rows and columns), as shown below:
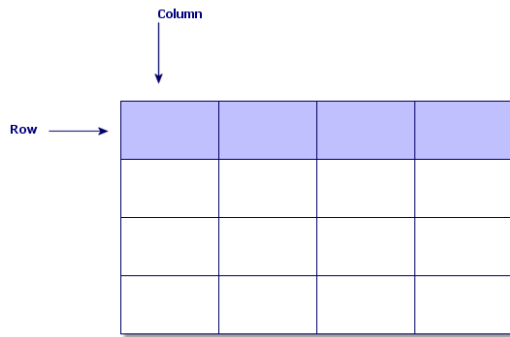
Using the relational model, we thus also define:

- 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.

Asset Manager 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 it in a logical fashion.
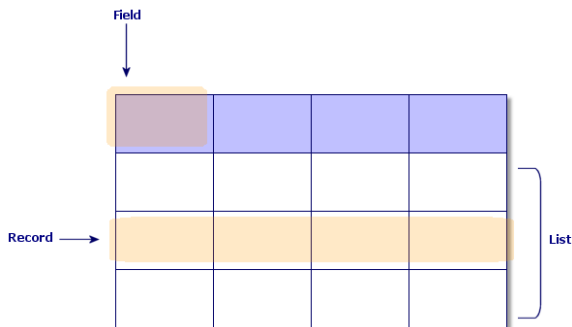
Remember these concepts, because you will come across them many times in Asset Manager.

Chapter 3: First steps with Asset Manager

This chapter is to familiarize you with the Asset Manager workspace. In particular, it 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 Asset Manager workspace.
- Use, then configure, the different modes of viewing data (list, detail, and so on) that are available to you.
- Enter new data in the database and work with the records.

This chapter includes:

Start Asset Manager

This section includes:

Windows client

There are two ways to start Asset Manager:

- 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 Asset Manager by selecting **Start/ Programs/ HPE/ Asset Manager 9.61 <language>/ Client**.

Starting multiple instances of Asset Manager

You can start several instances of the program.

Starting from the command prompt

To start Asset Manager 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 Asset Manager installation folder. For example, if you chose to install Asset Manager in the default folder, enter the following command:

   ```
   cd C:\Program Files\HPE\Asset Manager 9.61 xx\bin
   ```

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

   ```
   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 **Organization/ Employees and departments** menu item.)

- **-password**: password corresponding to the login (**Password** (LoginPassword) field in the **Profile** tab of the employee detail, which is displayed using the **Organization/ Employees and departments** 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

  - Helpdesk: Helpdesk

  - 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 -
config:Itam,Procurement
```

Caution:

- Parameter values may not contain spaces.

- When you activate modules via command lines, the **File/ Manage modules** menu is no longer available.

Web client

Configure Internet Explorer

Security settings

You must define the security settings that will enable the Asset Manager Web client to run properly.

Adapted security settings will allow the Web client to:

- Execute JavaScript

- Display pop-up windows

- Accept cookies

Security settings are defined at several levels:

- Globally, by the administrator of the IT department

- Locally, via each user's local Internet Explorer security settings

  You must define the security settings of the zone in which your company has placed the Asset Manager Web client (Internet, Local intranet, Trusted sites).

Tip: You may find it useful to add the Web client's URL to the list of trusted sites and to define a security level adapted to the Web client for these sites.

Pop-up windows

Pop-up blockers must be disabled.

Support for Web Browser

The Asset Manager Web Client supports the following web browsers:

- Internet Explorer

- Firefox

- Chrome

Note:

> For more information about the browser versions that are supported by Asset Manager, see the Asset Manager 9.61 Support/Compatibility Matrix.

Starting from Asset Manager 9.40, the Asset Manager Web Client supports multiple tabs. A user can click the Open in tab icon to open the Web client in a new tab, which is in the same session. Using other ways to open the Web client in a new tab is not supported.

Start the Web client

To access Asset Manager using the Web client:

1. Start the web browser.

2. Enter a URL using the following syntax:

   ```
   http://<Asset Manager Web Tier server name>:<Port used by Asset Manager Web
   Tier>/AssetManager
   ```

3. Populate the following fields:

Field	Value
Login	Login used to connect to the Asset Manager database
Password	Password associated with the login

Homepage of the web client

The homepage of the Web client consists of Asset Manager statistical widgets. The data, type, and layout of the widgets are all customizable.
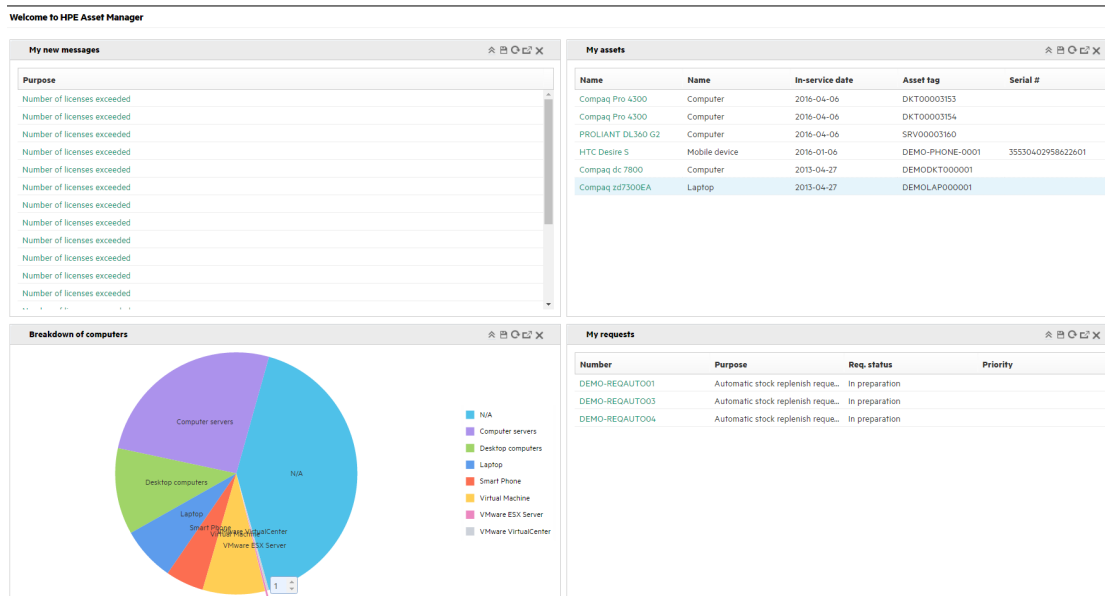
A widget that has drill-down capabilities can drill down to either a new widget (linked widget) or the detailed items in the widget. Asset Manager enables end users to drill down from a widget into another one at several levels. Drill-down can be defined on respective columns or clickable areas of the chart.

For more information about the homepage of the web client, see the *Tailoring Guide > Customizing Web Clients > Homepage of the Web client*.

Things to notice when using the web client

Page resolution

We recommend that you adjust your display resolution to higher than 1280 X 768 for optimal viewing and best application performance.

Do not use the "Back" button of the browser

We recommend that you do not use the "Back" button of any browser, which may cause unexpected errors. Instead, you can always return to the previous page with the Asset Manager web client user interface. For example, click the **Back** button on the web client user interface.

One transaction at a time

Do not run multiple transactions on the same page of the web client at one time. For example, if you edit a record while a relevant wizard is running, a transaction conflict may occur and cause unexpected behavior. The conflict can also happen if you create a new record while drilling down into statistics.

The detail frame shows the details of the previously selected record after filtering

If you select a record and then filter the list, even if the previously selected record is not in the filtered list, the detail frame will still show the details of that record.

The only way to modify multiple records simultaneously on the web client is to use the "Multi edit" button

As described in "Modify a selection of records" on page 70, you need to select the check boxes next to the records. After you select more than one record, the **Multi edit** button shows up and you can click it to edit the records simultaneously.

> **Caution:** By default, on the web client, records of a list and the record details are displayed on the same page, see "Combined list and detail view" on page 57. Be aware of the difference between clicking on a record and checking the checkboxes of multiple records. As by design, if you click on a record, the record will be bolded and the details of this record are displayed in the detail frame (the lower area of the list-detail view), the changes made in this frame only apply to this record. In contrast, to update multiple records, you must check the checkboxes of multiple records and use the **Multi edit** button.

In the screen shot below, if you make changes in the detail frame, you are working on the **Color LaserJet series 9500** record. If you want to edit two **Blade Server** records simultaneously, click the **Multi edit** button.

Connect 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 Asset Manager session. You can, however, launch multiple instances of the Asset Manager 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 and departments** 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 **Username** (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.

   Note: 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 **Administration/ User actions/ Change password** link in the navigation bar.

3. Click **Log In**.

Note: The URL that you used to display the connection page (and that points to Asset Manager 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 Asset Manager administrator to have launched the Asset Manager Automated Process Manager at least once,

- Is not available to client workstations running versions of Windows before Windows 2000.

- Assumes that you are connected to the Asset Manager 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; Asset Manager 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**.

Change the password upon connecting to a database

Users will receive the prompt to change their passwords under the following circumstances:

- A user logs in the Asset Manager clients after the **Password** (LoginPassword) field of this user has been changed and the **Force change** (bResetPwd) option has been selected.

  > **Tip:** This operation can be performed in the **amEmplDept** (**Organization management/ Organization/ Employees and departments**) table, **Profile** tab of this user record with Admin rights.

- A user's password has expired when this user attempts to log in the Asset Manager clients.

  > **Tip:** The new expiration date will be based on both the current date and the **Default number of days a new password is valid** property defined in the **Password management** wizard.

Disconnect from a database

Windows client

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

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

Web client

Click **Logout** at the upper right of Web client's workspace.

> **Note:** Save the modifications before logout because the Web client will not remind you when you are logging out.

HPE Live Network Resources

Asset Manager releases various resources such as training materials and content packages on HPE Live Network. On the web client, you can also access these resources through the **HPE Live Network**

link under your user name.
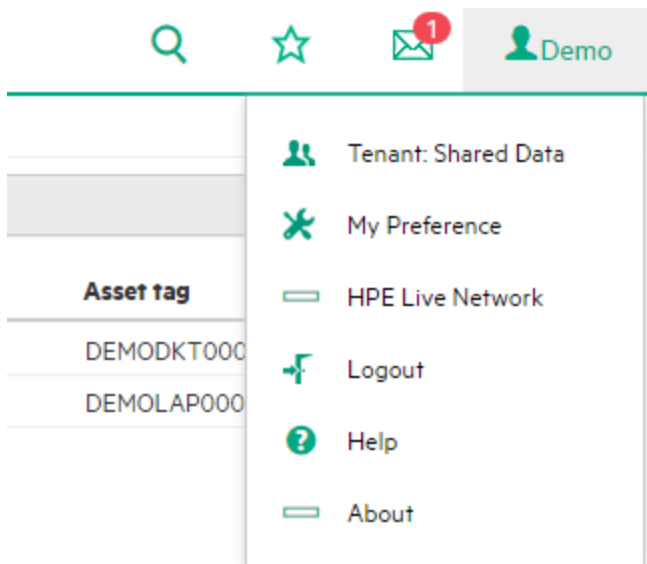
Asset Manager workspace

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

This section includes:

Menus

The menu bar

Windows client

All the Asset Manager 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 HPE 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

A shortcut menu is available on certain list, detail and wizard pages. A maximum of four groups of commands can be accessed via the shortcut menu, namely **Actions**, **Filter**, **Statistics** and **Utilities**. The commands accessible from the shortcut menu vary depending on the page and the area where the cursor is placed. The shortcut menu can be displayed by pressing **Shift** + **F10**, or by pressing the **Menu** key.

The same shortcut menu commands can be found in the drop-down lists on that page, except when the statistics list is disabled in the User preference. See **Tailoring** guide, chapter **Customizing Web clients**, section **Modifying the Web client's default behavior/ User defined customizations/ Preferences pane**.

Toolbar

Windows client

You can access the functions on the toolbar by clicking on any of its icons. Each icon corresponds to an Asset Manager 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 top of the Asset Manager workspace.

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

This toolbar cannot be customized.

An additional toolbar containing buttons is used to perform actions on records (**New**, **Delete**, **Modify**, and so on) and the **Actions** drop-down list is displayed inside the workspace. This toolbar cannot be customized but you can select where it appears in the workspace. See **Tailoring** guide, section **Customizing Web clients**, chapter **Modifying the Web client's default behavior**, section **To select where the toolbar appears in the workspace**.

Search through the navigation tree

A search box on the toolbar enables you to find a navigation link instead of selecting it from the cascading navigation tree.

To use this feature, click the [icon] icon on the toolbar, then enter part of the navigation link name in the search box, for example, *user*, the search engine suggests a list of navigation links (actions, reports, views or screens) that contain "user".
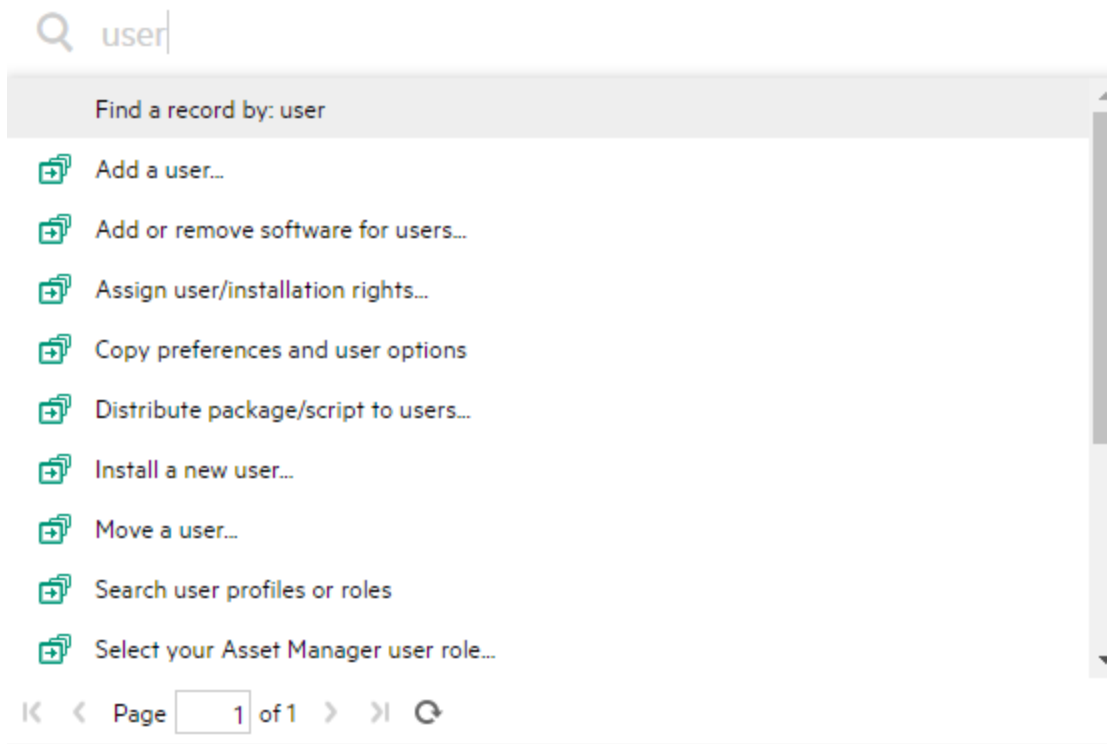
If you cannot find the expected navigation link on the current page of the suggested results, click ❯ ,

❮ , ❘❮ , or ❯❘ to find it on other pages.

Record Search

The Record Search feature can help you quickly find a record in Asset Manager. Notice that the Record Search shares the same search box with the "Search through the navigation tree" feature.

To use Record Search:

1. Enable Record Search by updating the package.properties files. For more information, see **Installation and Upgrade** guide > **Installing, Configuring, Removing, and Updating Asset Manager Web** > **Installing Asset Manager Web** > **Updating the Archive Files**.

2. Click the 🔍 icon on the toolbar. In the search box, type a search keyword.

3. Click **Find a record by <search keyword>**. Then, a new browser window opens and displays the search results.

   Note: Record Search supports wildcard characters, you can use **?** to replace a single character or use ***** to replace single or multiple characters. For example, if your search

> keyword is "u??r" or "u*r", the search result will contain the records that have "user" in them.

4. Click a search result to view the details of the record.
   A new browser window opens and displays the details of the record.

Note: The search results a user can see are limited to the content the user can access. Therefore, the search results for different users may be different even if they use the same search keyword.

Record Search only supports western languages.

It is not recommended to use Record Search in a multi-tenant environment.

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, and so on).
- 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.

Navigation bar

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

It is structured according to functional domain.

The components that appear are as follows:

- Actions

- Reports

- Views

- Screens of the tables

To add, remove or modify the position of a component on the **Functions** tab/ navigation bar:

- Actions, queries, reports and views:
    a. Start the Windows client.

    b. Connect to the database.

    c. Display the detail of the action, query, report or view.

    d. Modify the **Domain** (Domain) link.

- Screens of the tables:
    a. Start Asset Manager Application Designer.

    b. Connect to the database.

    c. Display the table containing the screen.

    d. Display the screens of the table (**View/ Screens** menu).

    e. Populate the **Domain** field with the SQL name of the functional domain to associate with the screen.

Hide/unhide the navigation bar

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.

- Reports

- Views

  > **Tip:** Views are available only in the Windows client, not the web client.
  >
  > For the equivalent of views in the Web client:
  >
  > ○ Create a screen with Asset Manager Application Designer: see **Tailoring** guide, **Customizinga databases** part, chapter **Customizing the database**, section **Creating new objects**, paragraph **Creating a screen**.
  >
  > ○ Create a view: see **Tailoring** guide, section **Customizing views**, chapter **Customizing views**.

Set the navigation menus unfolded by default

Windows client

This functionality is not available.

Web client

You can define the default behavior of the navigation tree via the **Navigation.ExpandModules** entry in the **web.xml** file (located in **<Tomcat installation folder>\AssetManager\WEB-INF**). Add this entry in terms of the following syntax.

Syntax

```
<env-entry>
<env-entry-name>Navigation.ExpandModules</env-entry-name>
<env-entry-type>java.lang.String</env-entry-type>
<env-entry-value>ExpandModules</env-entry-value>
</env-entry>
```

The format of **ExpandModules** is as follows:

- Populate the module name that you want to expand; for example: 'Financials' expands only the Financials module.

- Seperate the module names with comma when you want to expand several modules; for example: 'Catalog, Financials, Organization' expands these three modules.

- Use '*' to expand the first level; for example: 'Contracts/*' expands the first level of the Contracts module.

- Use '**' to expand all levels; for example: 'Contracts/**' expands Contracts and all its descendants.

Example

```
<env-entry>
<env-entry-name>Navigation.ExpandModules</env-entry-name>
<env-entry-type>java.lang.String</env-entry-type>
<env-entry-value>Portfolio management/*/*</env-entry-value>
</env-entry>
```

This will expand the first two levels of the **Portfolio management** module.

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 the Web browser:

1. Display the screen that you want to add to the Asset Manager favorites.

2. Click the ☆ icon in the upper right corner of the Web client's workspace.

3. Click **Add link to my favorites**.

You can click ☆ to open the saved page later. You can also use the search box in the **My favorites** window to search for a saved page.

> **Note:** Browser bookmarks or browser favorites are not supported in Asset Manager 9.61.

Display priority

Windows client

How and what a screen displays is subject to the following rules:

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 prefiltered 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.

> 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.

Online help

Online help displays help messages on screen while you are using Asset Manager.

Information is available to you from several online help systems:

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 Asset Manager.

Web client

The online help for the Web client contains the same content with the online help for the Windows client, although the functionality of the Windows and Web clients are not exactly the same.

To display online help, click your user name at the upper-right corner of the Asset Manager window, and then click the ❓ Help icon in the upper-right corner of the web client.

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, and so on.

- 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.

> **Note:** The contents of context-sensitive help for fields and links is not included in the printed guides. You can freely customize the content of this online help.

Web client

Context-sensitive help for a field or a link displays the same contents as the corresponding menu in Windows client.

There is only one way to access the context-sensitive help: put your cursor on the field or link, then simultaneously press the **SHIFT** and **F1**.

This function is available on the following types of controls: LinkEdit, OneToOneLinkEdit, MonetaryEdit, CheckBox, TimeSpanEdit, CaptionedLabel, ComboAlarm, FileEdit, TextBox, Edit, MultiLineEdit, NumberEdit, NumBox, PasswordEdit, ReversePasswordEdit, DbPathCombo, TableChoiceList, ComboDate, and ComboList.

Tip of the day

Windows client

The tip of the day is an online help that displays tips for using Asset Manager 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.

Record lists

This section includes:

Use of record lists

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

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.

Access the record list

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 Asset Manager 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.

Navigate through the record list

Windows client

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

- The Loading button

  Asset Manager 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 the **Options** window opens, expand the Lists entry to find the option.

  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 page of the list
◀	Previous page
▶▶	Last page of the list
▶	Next page of the list

To calculate the total number of records in a table, click the ▤ icon at the upper or lower right of the records lists.

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.
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.	Select a record to display the record's detail first. Then, click the **Duplicate** button. 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
Delete selected record permanently	Click the **Delete** button.	Click the **Delete** button.
Display a record's detail	Click the record and click the **Detail** button.	Click a record in the list.
Calculate the sums of the numerical values for each column in the main list	Click the icon. The following data types can be calculated.	Not available

Filed Created Type	Type	User Type
Double-precision number	Double-precision number	Default
Monetary	Double-precision number	Monetary
Percentage	Double-precision number	Percentage
Floating point number	Floating point number	Default
Integer (16-bit)	Integer (16-bit)	Default
Integer (32-bit)	Integer (32-bit)	Default

Close the list window	Click **Close** button	Not available

Hierarchical organization

Certain tables in Asset Manager are organized hierarchically: Each record can have a sub-record. Asset Manager 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 Employees and departments table, the "Sales head office" department has a sub-department named "Sales". "Sales head office" is the "parent" or "parent department" of "Sales". This creates a hierarchy as shown below:

Employees and departments table - Tree view (Windows client)

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

Windows client

- View type

  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
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**

Note: 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

  a. Open a hierarchical table.

  b. Display the list in tree view using the **Window/ Tree view** menu item.

  c. You can display the table as a simple list using the **Window/ List only** menu item if this makes it easier to read.

  d. 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.

  e. Click the record at the base of the branch to be moved and hold down the mouse key.

  f. Then drag the branch with the record to the base of the destination branch.

  g. All the sub-items that you moved keep their hierarchical order.

  Or:

a. Display the hierarchical list in "List and details" mode (**Window/ List and detail** menu item.)

b. Select all the records with the same parent.

c. Modify the field corresponding to the parent record: Select the new parent.

d. Click **Modify**.

Web client

The view type can be selected by clicking the button displayed above the list:

- Click the ⬞ icon at the bottom of the list to switch to tree view.

  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.

- Click the ⬚ icon at the top or the bottom of the list to switch back to list view.

Regroup 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:

  i. Open the screen of your choice.
     Make sure the screen is in list and detail mode.

ii. 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:

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

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

iii. 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:

i. Open the screen of your choice.

ii. Right-click the list and select **Utilities/ Configure list** from the shortcut menu.

iii. 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:

i. Open the Assets and Batches screen.

ii. Right-click the list and select **Utilities/ Configure list** from the shortcut menu.

iii. In the **Group by** field, select the Models (**amPortfolioItem.Model**) link

- **Cancelling a virtual hierarchy**

  To cancel a virtual hierarchy:

  a. Right-click the list that was modified by a grouping.

  b. 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 items tables) allows a hierarchical table to benefit from the hierarchy of another hierarchical table.

  For example, to use the hierarchy of the Portfolio items 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

Asset Manager 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

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

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

- List sorting

- Applying a filter selected from the following filters:
  - Filters automatically generated from all fields and links present in the table indexes

    > **Tip:** If an administrator adds a field or link to an index of the table using Asset Manager

> Application Designer, this new field or link will appear in the list of filters.

- ○ Filters automatically generated from all queries with the following properties:
  - **Table** (TableName) link: The list's table
  - **Request type** (seType) field: **Standard**

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

The above parameters used for the list are reset each time the list is displayed via the navigation tree.

However, customized user preferences for list display can be defined and saved as follows:

- Number of rows per page (defaults to 20) can be changed using the **Preferences** pane. See the **Tailoring** guide, section **Customizing Web clients**, chapter **Modifying the Web client's default behavior**, section **User defined customizations/ Preferences pane**. Alternatively, you can simply use the **Records per page** drop-down list at the bottom-right corner.

- Which columns display for the current list, and in which order, can be defined for the current user. See the **Tailoring** guide, section **Customizing Web clients**, chapter **Modifying the Web client's default behavior**, section **User defined customizations/ Configuring list columns**.

List layout

Quickly sort 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.

Employees screen - list sorting tools
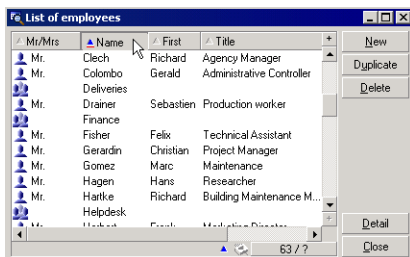
Click [image] in order to sort a column's values in ascending order. If you double-click [image], it will sort the column's values in descending order (inverse). If you simultaneously press Shift while doing this, the values will be directly sorted in descending order.

Click this button to switch between ascending and descending sorts ([image] and [image]).

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

Web client

Both the main lists and the secondary lists (lists under the tabs) can be sorted.

In order to sort a column in a secondary list, 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 add 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

Which columns display for the current list, and in which order, can be easily customized. See the **Tailoring** guide, section **Customizing Web clients**, chapter **Modifying the Web client's default behavior**, section **User defined customizations/ Configuring list columns**.

> **Tip:** The columns that are displayed in a list correspond to the fields and links that are defined for the screen via Asset Manager Application Designer (**Columns in the list** field).

Quickly remove 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

Which columns display for the current list, and in which order, can be easily customized. See the **Tailoring** guide, section **Customizing Web clients**, chapter **Modifying the Web client's default behavior**, section **User defined customizations/ Configuring list columns**.

Quickly move a column in a list

Windows client

Functionality not available.

Web client

On the Web client, the columns in a list can be simply moved by drag-and-drop. To do this, click the column header, hold down the mouse button, and then drag the column to the desired location.

Adjust 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, Asset Manager automatically adjusts the column size for this column only.

Web client

On the Web client, click the border of the column header, hold down the mouse button, and then drag the border to adjust the width of the column.

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

Windows client

The **Columns and sort** tab includes two windows side-by-side. The window on the left 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.

- f(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. Asset Manager automatically types ahead for you.

From the right-hand window, the following display properties can be set:

- **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, and so on.

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:

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

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 (memScript)	`If AmDateDiff([dEnd],AmDate()) < 7776000. Then`
	`  RetVal = AmRgbColor( "RED" )`
	`Else`
	`  RetVal = AmRgbColor( "BLACK" )`
	`End If`

b. Use the **Asset lifecycle/ Vendor contract/ Contracts** navigation menu item to display the list of contracts.

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

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

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

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

    g. 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, and so on.

- **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.

Web client

You can add or remove columns to or from a list using the **More / Configure the columns of the list** shortcut menu item in Web client. Selecting this menu item displays two windows side-by-side. The left-hand window contains a list of available columns and the right-hand window contains a list of columns already selected in the current list.

Double click the desired column in the left-hand window or select the column and click the right arrow on the middle bar to add the column to the list. Double click a column in the right-hand window or select the column and click the left arrow on the middle bar to remove the column from the list. The first and fourth button on the middle bar add or remove all the columns in one window to or from the other.

The buttons to the right of the right-hand window change the order of the columns in the list.

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 Asset Manager Application Designer.

- 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.

View statistics

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

Windows client

Statistics can be viewed for lists of the following types:

- Main list (the list that appears when you click on a link within the navigation menu)

- Tab list (a list that appears in a tab of a record's detail)

> **Note:** In the Windows client, however, you cannot view the statistics of a list that appears within a wizard.

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. Asset Manager displays the statistics in a new window.

5. If you double-click on one of the columns in the graphic, Asset Manager will open a new window enabling you to filter the corresponding records.

Note: The statistics are limited to the first ten values found by Asset Manager. 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.

Web client

Statistics can be viewed from any type of list:

- Main list (list that is displayed after clicking a link on the navigation bar)

- Tab list (list that appears on a tab of a record's details)

- Wizard list (list that appears on a wizard's page)

To view statistics for a displayed list, either

Select the statistic from the **Statistics** drop-down list. (Note that this will not be available if the **Display Statistics Combobox** option has been unchecked on the **Preferences** pane. For further details, see the **Tailoring** guide, section **Customizing Web clients**, chapter **Modifying the Web client's default behavior**, section **User defined customizations/ Preferences pane**.)

The list displays an entry by:

- Table index, except if the index is on the primary key
- Statistic whose context is on the table

Search 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. Asset Manager 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. Asset Manager 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

Click the ⛛₊ icon and select a filter from the drop-down list. Then, type the search criteria and click **Search**.

Manipulate records in a list

Select 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. Only visible records are selected.

Selection cart

> **Note:** This section does not apply to the Windows client.

Asset Manager Web client stores the selected records in the selection cart. You can view the cart, remove your selections and operate on them.

With selection cart functionality, records selected before applying a filter are stored for later use. This enables you to successively filter and select records from the filtered results.

- **Presentation of the record list GUI**

GUI element	Description
Display selections	Click this button to open the selection cart.
# of selections	It displays the number of selected records.
Action on the selections in current page	This option decides whether to implement your action on the selections in the current page, or the selections althrough the pages.

How to use the selection cart

- **Prerequisite**

Before using the selection cart, select the **Allow me to apply filters without losing selections already made** option in the **Preferences** pane.

See **Tailoring** guide, chapter **Customizing Web clients**, section **Modifying the Web client's default behavior/ User defined customizations/ Preferences pane**

- **Add selections to the selection cart**

  The selections immediately go to the selection cart after you have selected the check box to the left of the desired records.

  The following example shows how to select records accumulatively from the filtered results.

  Scenario:

  Select all records whose **Asset tag** starts with "SRV" or **Model** is "Web server".

  Procedure:

  a. Select **Asset tag** from the **Filters** drop-down list.

  b. Populate "SRV" for **Asset tag** and select the **'_' and '%' are wildcard characters** option.

  c. Click **Apply filter and KEEP all selections**.

  d. Select all of the records from the filtered list. Notice that the **# of selections** displays the number of records whose **Asset tag** starts with "SRV".

  e. Click **Clear filter**.

  f. Select **Model** from the **Filters** drop-down list.

  g. Select "Web server" for **Model**.

  h. Click **Apply filter and KEEP all selections**.

  i. Select all of the records from the filtered list. Notice that the **# of selections** is increased by the number of records whose **Model** is "Web server".

  j. Click **Display selections** to view your selection cart.

- **Remove selections from the selection cart**

  ○ To remove one or several selections, clear the box to the left of the records that you want to remove.

  ○ To remove all selections, click **Clear all selections**.

Operate on the selections in the selection cart

You can implement actions and view statistics of the selections in the shopping cart.

See Use wizards and View statistics for details.

Move 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.

Add objects to a floor plan

Windows client

When you define a floor plan (**Organization management/ Organization/ Floor plans**) you can add records (assets, employees, and so on) 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 floor plans, refer to the **Common tables** guide, chapter **Floor plans**.

Web client

Functionality not available.

Export a list

Windows client

Asset Manager 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 a record's 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 list, use the **Utilities/ Export the list** shortcut menu item.

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, Asset Manager automatically starts Microsoft Excel and displays the exported data in a new worksheet.

     Note: Microsoft Excel must be installed on your system. Asset Manager 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.

     Note: We advise against exporting the name of the table if the export file is intended for use in Microsoft Access.

   ○ 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**.

Caution: To export the data, all Asset Manager users can use the **Export list** shortcut menu item, which allows the active list to be exported. Only Asset Manager administrators, however, can use the Asset Manager Export option, since it enables you to perform very complex export procedures. Refer to the administration guide for more information about this subject.

Note: In the Windows client, you can only export a main list (lists that appear when you click on a link in the navigation menu). You cannot export a tab list (a list that appears in a tab of a record's detail) or a wizard list (a list that appears within a wizard page).

Web client

All list types can be exported:

- Main list (list that is displayed after clicking a link on the navigation bar)

- Tab list (list that appears on a tab of a record's details)

- Wizard list (list that appears on a wizard's page)

To export a displayed list to Excel, either:

Click the icon above the list.

Or,

Right-click in the list body and select **Utilities/ Export Excel**.

Depending on your file options, you may be offered the choice of saving the list to an Excel worksheet, or of launching Excel with the list worksheet open. In the latter case Excel starts automatically (its path does not need to be specified)

The contents of the list and the column names are exported and respect the following criteria:

- Filter, if any, applied to the list

- Sort order applied to the list

- Parameter defining the maximum number of lines to export

When exporting a list to Excel, you can use the drop-down list next to the icon to save the worksheet as a .xls file, which supports up to 65536 rows. Or, you can choose to save the worksheet as a .xlsx file, which can support more than 65536 rows. By default, a list is exported as a .xlsx file.

> **Note:** For any data of the Date/Time type, you can change the output format by selecting a different value in the **Date format** drop-down list in **My Preference**.

To learn how to define the number of lines to export to Excel: see **Tailoring** guide, section **Customizing Web clients**, chapter **Modifying the Web client's default behavior**, section **Defining the number of lines to export to Excel**.

Record details

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

This section includes:

Access the 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

Asset Manager 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.

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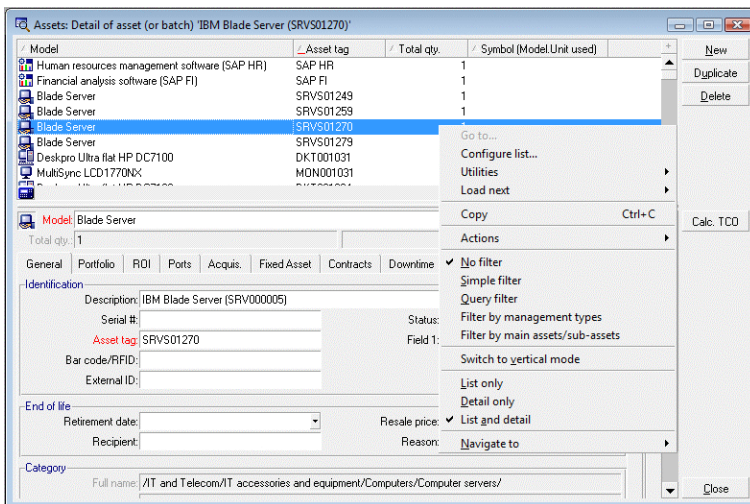
The following keyboard shortcuts are assigned to these modes:

- 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

In the Web client, by default, list and details are displayed in the same screen.

To open the record details on a new tab, point to the record and click the icon.

Resize windows

Windows client

Asset Manager 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.
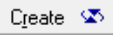
2. Click the mouse and, while holding down the mouse button, move the pointer to the desired position.

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.

Action 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**
When you are modifying a record, clicking this button will cancel the modifications and revert to the original	**Cancel**	**Cancel**

Desired result	Action to execute in the Windows client	Action to execute in the Web client
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	**Delete**
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	➕	**New**

Desired result	Action to execute in the Windows client	Action to execute in the Web client
detail.		
Delete a record from a detail list		**Delete**
Add an alarm to the field to the left of the button		

Tabs in a record detail

Asset Manager displays database record information in a zone named 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 to the right of the list, the shortcut menu, or the general menu.
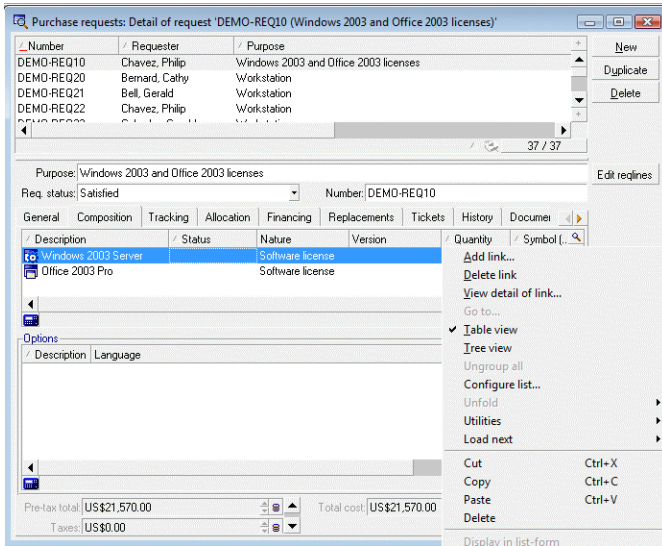
To manipulate the records in the tab when they are displayed in the form of tabs, start by selecting the identifier of the tab, then use the shortcut menu or the general menu.
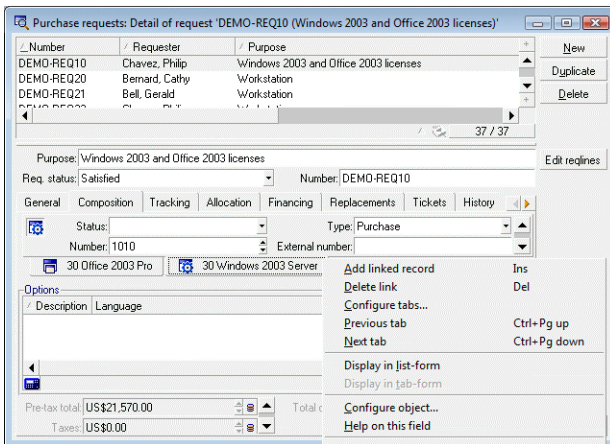
You can perform the following manipulations:

Intended action (followed by the context)	Corresponding manipulations	Available in list form	Available in tab form
Add a link (List zone)	Shortcut menu: **Add link**	Yes	Yes
Delete a link (List zone)	Shortcut menu: **Delete link**	Yes	Yes
View the detail of a link (List zone)	Shortcut menu: **View detail of link**	Yes	No

Intended action (followed by the context)	Corresponding manipulations	Available in list form	Available in tab form
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.
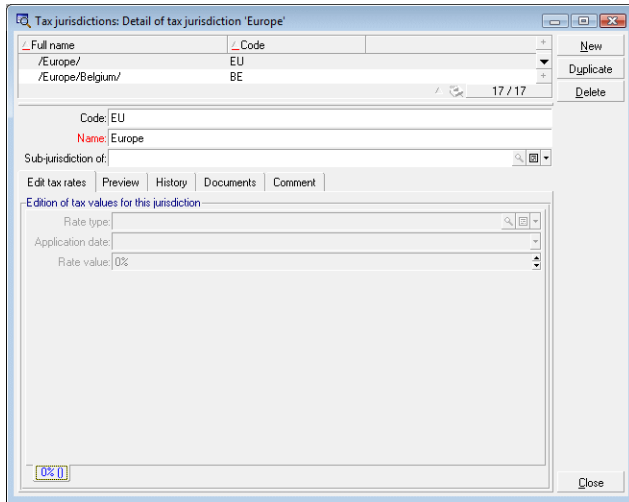
2. Right-click.

3. Select **Add linked record** 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 above the list (do not confuse these buttons with the buttons that perform an action on the main record).

To view statistics, select the desired statistic from the **Statistics...** drop-down list.

To filter the elements of the list, use the filters found in the **Filters...** drop-down list.

To export the list to Excel, click the icon.

Navigate through the record detail

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

Operations on records

This section explains how to create, modify and delete records in the Asset Manager database.

This section includes:

Use of record detail

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.

Create a new record

Windows client

1. Display the table in which you want to create the record.

   For example: To create a new employee record, click the **Organization management/ Organization/ Employees and departments** link on the navigation bar.

2. Do one of the following:

   ○ Click new

      or

   ○ Press the **Insert** key, if the cursor is in the record list.

3. Populate the fields and links of the record detail.

   > **Note:** Only fields or links for which a default value is defined are pre-filled.

4. Do one of the following:

   ○ Click the **Cancel** button to cancel creation of the record.

      > **Note:** If you click the **Cancel** button after clicking the **Create** button, you will lose any changes you made since you last clicked **Create** or **Modify**.

   ○ Click **Create** to add the record to the database.

   ○ Click the **Create** button with the two curvy arrows.

   The record is added as if you had clicked the **Create** (single) button, then the record is duplicated as if you had clicked the **Duplicate** button.

   Duplicate an existing record once.

Web client

1. Display the table in which you want to create the record.
   For example: To create an employee, select the **Organization management/ Organization/ Employees and departments** link on the navigation bar.

2. Click **New**.

3. Populate the fields and links of the record detail.

   > **Note:** Only fields or links for which a default value is defined are pre-filled.

4. Do one of the following:

   ○ Click the **Cancel** button to cancel creation of the record.

      > **Note:** If you click the **Cancel** button after clicking the **Save** button, you will lose any changes you made since you last clicked **Save**.

      or

   ○ Click **Save** to add the record to the database.

Duplicate an existing record once

Windows client

1. Display the table which contains the record to duplicate.

2. Select the record to duplicate.

3. Click the **Duplicate** button.

4. Populate the detail of the record.

5. Do one of the following:

    ○ Click the **Cancel** button to cancel creation of the record.

        Note: If you click the **Cancel** button after clicking the **Create** button, you will lose any changes you made since you last clicked **Create** or **Modify**.

    or

    ○ Click **Create** to add the record to the database.

    or

    ○ Click the **Create** button with the two curvy arrows.

        The record is added as if you had clicked the **Create** (single) button, then the record is duplicated as if you had clicked the **Duplicate** button again.

Web client

1. Display the table which contains the record to duplicate.

2. Display a detail of the record to duplicate.

3. Click the **Duplicate** button.

4. Populate the detail of the record.

5. Do one of the following:

    ○ Click the **Cancel** button to cancel creation of the record.
        Note: If you click the **Cancel** button after clicking the **Save** button, you will lose any changes you made since you last clicked **Save** or **Modify**.

    or

- Click **Save** to add the record to the database.

How to find out if the value of a field or link will be duplicated

To find out if the value of a field or link will be duplicated, you need to check the database structure:

1. Start Asset Manager Application Designer.

2. Connect to your database.

3. Select a table.

4. Display the fields (**View/ Fields** menu item).

5. Select a field.

6. Click the **Scripts** tab.

7. Examine the **Reapply default value in case of duplication** check box.
   If this option is selected, the field's value is not duplicated. The default value is applied.

8. Display the indexes (**View/ Indexes** menu item).

9. Select an index.

10. If the field's **Type** is **Unique** or **UniqueOrNull**, then at least one of the fields in the **Fields** field is not duplicated. The default value for this field will be used.

11. Display the links (**View/ links** menu item).

12. Select a link.

13. If the field's **Type** is **Copy** or **OwnCopy**, then the link is not duplicated. The default value will be used.

Duplicate an existing record multiple times

Windows client

1. Display the table which contains the record to duplicate.

2. Select the record to duplicate.

3. Select **Edit/ Duplicate**.

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

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

Web client

This functionality is not available.

Setting up the database for duplication

> **Note:** In order for this duplication method to function properly, all fields and links that are mandatory or that are part of a unique index must have a non-null default value.
>
> If this hasn't been done, duplication will not function and Asset Manager informs you that the record cannot be duplicated.

Modify a single record

> **Note:** You cannot modify a record by editing the information in the list of records.

Windows client

1. Display the table which contains the record to modify.

2. Display the detail of the record to modify.

3. Modify the record.

4. Do one of the following:

   - Click the **Cancel** button to cancel modification of the record.

     or

   - Click **Modify** to update the record in the database.

Web client

1. Display the table which contains the record to modify.

2. Display the detail of the record to modify.

3. Modify the record.

4. Do one of the following:

   - Click the **Cancel** button to cancel modification of the record.

     or

   - Click **Save** to update the record in the database.

Modify a selection of records

Windows client

1. Display the list in **List and details** mode and simultaneously select the records to be modified in the list.
   Asset Manager then displays in the detail window:
   ○ The fields that can be modified: White background.
   ○ The fields that cannot be modified: Gray background.

2. Modify the files or links that must have the same value for all of the selected records.

3. Click **Modify** to update the records in the database.

> **Tip:** The other solution, more complex but more powerful, involves exporting the records to modify them outside of Asset Manager, then re-importing them. Refer to Export a list in section Record lists for more information.

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 boxes next to the records. After you select more than one record, the **Multi edit** button shows up and you can click it to edit the records simultaneously.

If a field cannot be modified, the corresponding box will gray out. A field can be modified for multiple records only when:

- The field does not have a unique constraint.

- The field must exist in all the records you selected.

- The value of the following properties must be the same:
  ○ ReadOnly

  ○ Irrelevant

  ○ Readable

- For a field with options such as a drop-down list, the options of the field must be the same.

Delete records

Caution: 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

1. Display the table which contains the records to delete.

2. Select the records to delete.

3. Do one of the following:

   ○ Click the **Delete** button.

     or

   ○ Press the **Del** key.

Note:

- If the records to delete are linked to other records that must also be deleted (this depends on the database structure), and if it is possible, Asset Manager deletes the records that you selected along with the linked records. Otherwise, an error message will appear.

- To enable the deletion of linked records, activate the **Authorize extended deletions** option 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. Check the checkboxes next to the records you want to delete.

   Note: You can select them from several pages.

3. Select the **Delete** contextual action.

4. Confirm the deletion (**Yes** button).

Note: If the records to delete are linked to other records that must also be deleted (this depends on

the database structure), and if it is possible, Asset Manager deletes the records that you selected along with the linked records.

Populate a record's detail

This section explains how to enter information in the detail of the record that is being created, duplicated or modified.

A record's detail contains fields and links.

Fields

The fields correspond to data that is stored directly in the record's table.

Freely edited fields

Type in the value using the keyboard.

Fields edited using an itemized list

There are several types of itemized lists:

- system (no one can modify the list of values)

- non-system open type (any connected user with the adequate user role can modify the list of values)

- non-system closed type (only a connected user with administration rights can modify the list of values)

To select the value in an itemized list, do one of the following:

- Click the ⏷ icon to the right of the field (Windows client) or on the edit zone (Web client), then select the value from the drop-down list

- Enter all or part of the value.
  Asset Manager automatically completes what you are entering if a value starting with the same characters already exists.

Check boxes and radio buttons

Select or clear the check box with the mouse or the space bar.

Links

Links are used to associate the record to a unique record (1 link) or several records (n link) from other tables.

Databases that operate in this manner are named "relational databases".

The advantage of this strategy is that it limits data duplication, which increases processing times and lowers memory usage.

- **1 links**

  - **Populate a link**

    Do one of the following:

    - Windows and Web clients: Enter all or part of the value. Asset Manager automatically completes what you are entering if a value starting with the same characters already exists.

      Note: The edit zone for links displays the **description string** of the target table.

      To see an example:

      A. Start Asset Manager Application Designer.

      B. Connect to your database.

      C. Select a table

      D. Examine the **String** field. This field contains the description string of the table. This string is a concatenation of characters and references (SQL name of the table's fields and links). The description string defines what is displayed in the link edit zone to the target table.

    - Windows and Web clients: Select the linked record via the (Windows client) or (Web client) icon to the right of the link.

    - Windows client: Click the icon to the right of the link.

  - **Web client: Force AutoComplete**

    Normally, the Web client will automatically complete the record or display a drop-down list.

    However, if it does not, press the **Right** arrow key to activate it.

  - **Web client: Select a given record from the drop-down list**

    Perform one of the following operations:

- Select the record (click the record).

  The link edit zone will remain selected.

- Use the **Up** and **Down** arrow keys to select the desired record, then:

  - Press **Enter**.

    The link edit zone will remain selected.

  - Press **Tab**.

    The new object on the screen is selected.

  - Press **Shift** and **Tab** simultaneously.

    The previous object on the screen is selected.

○ **Web client: Define the number of records to display in the 1 link drop-down lists**

To learn how to define the number of records to display in the drop-down lists: see **Tailoring** guide, section **Customizing Web clients**, chapter **Modifying the Web client's default behavior**, section **Defining the number of records to display in drop-down lists**.

○ **Delete a link**

   i. Windows and Web clients: Display the detail of the main record.

   ii. Windows and Web clients: Delete the text from the link edit zone.

   iii. Windows and Web clients: Save the changes (**Modify** button in the Windows client or **Save** in the Web client).

○ **Modify a linked record**

   i. Windows client: Click the icon to the right of the link to display the detail of the linked record.

   ii. Web client: Click the link to display the detail of the linked record.

   iii. Windows and Web clients: Modify and save the change on the linked record detail.

○ **Create a linked record**

When you enter characters in the link's edit zone, Asset Manager automatically fills in the rest.

If you enter a value that does not correspond to any record in the linked table, a pop-up dialog window will appear when the focus is moved away from the field, asking if you want to create a new record in the target table.

You then have two choices:

- **On-the-fly creation**: Asset Manager creates a new record in the target table but does not display its detail. You can enter the information describing the record later.

> **Note:** In the Windows client, this option can be disabled via the **Options/ Authorize creations on the fly** menu.

- **Detailed creation**: Asset Manager displays a detail window for the new record enabling you to enter the record's information.

> **Note:** When you enter hierarchy values in the link, the **On the fly creation** option will create the whole hierarchy, while the **Detailed creation** option does not support this functionality and Asset Manager will give an error message in this case.

- **n links**

    - **Windows client: Populate an n link in list view**

        i. Display the tab which has the list of linked records.

        ii. Select **Display in list-form** in the shortcut menu (right-click in the list).

        iii. Click the **+** or **-** icons to the right of the list to add or delete a link.

    - **Windows client: Populate an n link in tab view**

        i. Display the tab which has the list of linked records.

        ii. Select **Display in tab-form** in the shortcut menu (right-click in the list).

        iii. Right-click the sub-tab situated at the bottom of the window.

        iv. Select **Add linked record** or **Delete link** from the shortcut men.

    - **Web client: Populate an n link**

        i. Display the tab which has the list of linked records.

        ii. Click the **Add** or **Delete** buttons above the list to add or delete a link.

    - **Modify a linked record**

        i. Windows and Web clients: Select the link in the list.

        ii. Windows client: Click the 🔍 icon to the right of the link to display the detail of the linked record.

        iii. Web client: Click the link to display the detail of the linked record.

        iv. Windows and Web clients: Modify and save the change on the linked record detail.

Default values

When first creating a record, Asset Manager uses the default value, if 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.

This is true as long as you do not add the record to the database (**Create** button in the Windows client or **Save** in the Web client).

The formulas that define these fields are only applied when the record is first created; they are not used when you modify a record.

Mandatory nature of fields and links

Windows client: Mandatory fields and links appear in red.

Web client: Mandatory fields and links are preceded by an asterisk.

The other fields and links are optional.

Refresh multi-user modifications

Behavior of Asset Manager when several users access a database at the same time

Because Asset Manager 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 Asset Manager is working, other users may modify detail information, add new records, delete 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.

Complied rules

Asset Manager applies the following rules when several users access a database at the same time:

- 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 message is given to the user who is **last** to confirm the modification.
  - Windows client: It is prompted that the record has been modified. If the user commits the update, the change by the last user to click the **Modify** button is stored in the database.
  - Web client: The warning message prevents user from saving the record because it has been modified. User has to refresh the page before modifying the field.

- Technically, here is what happens when you are modifying a record: 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 record being edited by a user is deleted by another user, the user who is editing the record receives an error message when they click the **Modify** (Windows client) or **Save** (Web client) button.

- Counters are incremented each time a user clicks the **New** or **Duplicate** button.
  If the user cancels the data entry without validating creation, the counter is not decremented (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.

Enable cancellation of an action running on records

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).

Web client

This functionality is not available.

Edit data

This section includes:

Assign values by default

Windows client

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

Your Asset Manager administrator defines field default values:

- Either by using Asset Manager Application Designer.

- Or by using the **Configure object** menu item in the context menu of this field (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, and so on.

> **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.

  > **Note:** 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 Asset Manager Automated Process Manager. 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 Asset Manager Application Designer will be applied to the Web client.

Cut

Windows client

- **Cut 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.

- **Cut 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, and so on)

  To cut records in a detail list and place them in the Clipboard:

  a. Select the records to be cut.

  b. Use the **Edit/ Cut** command.

  c. Click **Modify** to record the operation.

  > **Caution:** 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 operating system or browser.

Copy

Windows client

- **Copy 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.

- **Copy 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 operating system or browser.

Paste

Windows client

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

- **Paste 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.

- **Paste 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, and so on)

  - **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, that is, the table of assets under contract.

  - **How to paste in detail lists**

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

Web client

Use the paste commands of your operating system or browser.

Delete 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 operating system or browser.

Using keyboard shortcut for a button

On the Web client, you can use keyboard shortcut for a button. The shortcut of the button is shown when you point to the button.

Windows client: Date data-entry rules

- 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** + **;**.

Windows client: Time data-entry rules

Hours, minutes and seconds are authorized.

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

```
10:08:54
```

Windows client: Date + Time data-entry rules

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
[<Separator>]]]]]]]
```

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 (for example, "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

Asset Manager 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.

- **Associate 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. Asset Manager 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, Asset Manager prompts you to select the image file.

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

- **Store images**

  - **Images are stored in the Images (amImage) table of the Asset Manager database.**

  - **They are converted to a custom Asset Manager 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.

Chapter 4: Search for items in a table

This chapter's 's objective is to teach you how to search for records with Asset Manager 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.

This chapter includes:

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 Asset Manager database administrator defines which screens use 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)

  > **Note:** This option enables or disables query wizards for all tables.

Web client

To filter records from a list using the query wizard defined by Asset Manager Application Designer on the screen to which the list belongs, select the **QBE** filter from the drop-down list above the records list.

Search filters

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

Windows client

Overview

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 Asset Manager 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.

- ![icon] 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.)

- ![icon] 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). Asset Manager 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.

Specific filter on the valid contracts concerning an asset
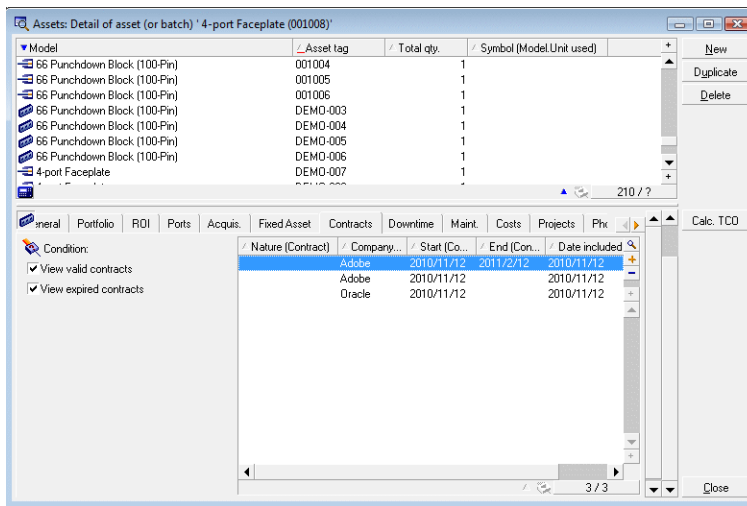
Superimposing filters

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] 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.)

Operation of filters

Caution: 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 ![icon] icons that appear in the filter zones. If no such icon appears, the filter is applied automatically. If the icon appears in gray ![icon], 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, Asset Manager 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.

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

Comparison operators, continued

Operator	Description
>=	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/%'.

Use the filters

> **Caution:** 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:
  a. Place the mouse on the filter-definition zone that you want to disable.
  b. Right-click to display the shortcut menu.
  c. 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:** Asset Manager 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.

Apply one or many simple filters

> **Caution:** 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.

   > **Note:** Right-click on the field or link used to filter records. A shortcut menu appears. Select **Filter on this field** or **Filter on this link**. Then click ![icon] to display the corresponding records in the list.

3. Select the object in the table with the filter using the drop-down list to the right of ![icon].

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 ![icon] 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.

Apply a query filter

> **Caution:** This section does not apply to the Web 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 Asset Manager 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.

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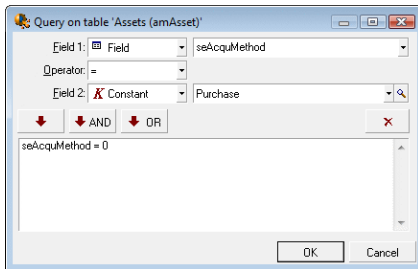
4. Define your filter criteria in the **Filter** tab using Field 1 and Field 2 and their associated values, which define the selection criteria. An operator defines the logical comparison between these two fields.

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

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

6. Finally, click 🔍 to launch the filtering function.

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 Asset Manager Application Designer, 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 Asset Manager Application Designer)

Chapter 5: Wizards

This chapter includes:

Definition of a wizard

Asset Manager 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. Asset Manager 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.

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 Asset Manager 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 Asset Manager 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 **Create/Modify delegations...** (sysCoreDelegation) wizard guides you through the steps necessary to create a record in the Employees and departments 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 Asset Manager 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.

Windows client: Create wizards

> **Note:** In addition to the out-of-the-box wizards, Asset Manager allows you to create new wizards via the Windows client.

Wizard creation is reserved for advanced users

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

Use wizards

This section includes:

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 of the navigation bar 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 **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 **Actions** list.

Navigate 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

A wizard page needs refreshment when its 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.

Display statistics

Windows client

This feature is not available in the Windows client.

Web client

Some wizard pages contain lists of elements.

To view statistics for a wizard list, either

Select the statistic from the **Statistics** drop-down list. You can then return to the wizard by clicking the link that appears as the wizard's name. (Note that this will not be available if the **Display Statistics Combobox** option has been unchecked on the **Preferences** pane. For further details, see the **Tailoring** guide, section **Customizing Web clients**, chapter **Modifying the Web client's default behavior**, section **User defined customizations/ Preferences pane**.)

Export the list to Excel

Windows client

This feature is not available in the Windows client.

Web client

Some wizard pages contain lists of elements.

To export a wizard list to Excel, click the icon.

Chapter 6: Print data

This chapter explains how to print data with Asset Manager.

This chapter includes:

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.

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

You can access this table via the **Administration/ Reporting/ Reports...** navigation menu. You can only add new reports via the SAP Crystal Reports application (see the **SAP Crystal Reports** chapter 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.

Print information from a list

A list can be printed in different ways:

Windows client

- **Select the report in the navigation bar**

  a. Expand the navigation bar link corresponding to the report's functional domain.

     Tip: The report's functional domain is defined in the report detail, in the **Domain** (SQL name: Domain) field.

  b. Click the report name in the navigation bar.

  c. Click the **Print** icon.

- **From the list of reports**

  a. Display the reports (**Administration/ Reporting/ Reports** link on the navigation bar).

  b. Display the report detail.

  c. Click **Preview**.

  d. Click **OK**.

  e. Click the **Print** icon.

- **Via the File/ Print menu**

  a. Select the **File/ Print** menu item.

  b. Populate the **Type** field with the value **Non-contextual report (SAP Crystal Reports)**.

  c. Select the report in the **Report** list.

  d. Click **Print**.

Web client

- **Using the 🖨 icon**

  a. Display the list that you want to print.

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

     A new Internet Explorer window is displayed.

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

Print the detail of records

Windows client

To print the detail of a record you must use the detail reports.

There are various ways to print a detail report exist, depends on where you select the report from:

- **Navigation bar**

    a. Display the list containing the record that is the object of the report.

    b. Select the record that is the object of the report.

        Note: You can only select one record.

    c. Expand the navigation bar link corresponding to the report's functional domain.

        Tip: The report's functional domain is defined in the report detail, in the **Domain** (SQL name: Domain) field.

    d. Click the report name in the navigation bar.

    e. Click the **Print** icon.

- **List of reports**

    a. Display the reports (**Administration/ Reporting/ Reports** link on the navigation bar).

    b. Display the report detail.

    c. Click **Preview**.

    d. Select the record that is the object of the report.

    e. Click **OK**.

    f. Click the **Print** icon.

- **File/Print menu**

    a. Display the list of records that are the object of the report.

    b. Select the records that are the object of the report.

    c. Select the **File/ Print** menu item.

    d. Set the **Type** field to **Detail report (SAP Crystal Reports)**.

    e. Select the report in the **Report** list.

    f. Click **Print**.

Web client

- **Using the** **icon**

    a. Display the list that you want to print.

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

A new Internet Explorer window is displayed.

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

Print preview

The way the print preview of the report is displayed depends on the report type (detail, list or graph):

Windows client

Report previews can be displayed in several ways before printing, depends on where you select the report from:

- **Navigation bar**

  a. Display the list containing the record that is the object of the report.

  b. Select the record that is the object of the report.

    > **Note:** You can only select one record.

  c. Expand the navigation bar link corresponding to the report's functional domain.

    > **Tip:** The report's functional domain is defined in the report detail, in the **Domain** (SQL name: Domain) field.

  d. Click the report name in the navigation bar.

  e. To configure the printer: Click the ⬛ icon.

- **List of reports**

  a. Display the reports (**Administration/ Reporting/ Reports** link on the navigation bar).

  b. Display the report detail.

  c. Click **Preview**.

  d. Select the record that is the object of the report.

  e. Click **OK**.

  f. To configure the printer: Click the ⬛ icon.

- **File/Print menu**

  a. Display the list of records that are the object of the report.

  b. Select the records that are the object of the report.

   c. Select the **File/ Print** menu item.

   d. Set the **Type** field to **Detail report (SAP Crystal Reports)**.

   e. Select the report in the **Report** list.

   f. Click **Preview**.

   g. To configure the printer: Click the 📦 icon.

Web client

- **Using the** 🖨 **icon**

   a. Display the list that you want to print.

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

       A new Internet Explorer window is displayed.

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

List reports and graphs

Previews for a list report or a graph can be displayed in several ways before printing:

- **Select the report in the navigation bar**

   a. Expand the navigation bar link corresponding to the report's functional domain.

> **Tip:** The report's functional domain is defined in the report detail, in the **Domain** (SQL name: Domain) field.

   b. Click the report name in the navigation bar.

   c. Windows client: To configure the printer: Click the 📦 icon.

       Web client: Click the 🖨 icon at the upper right of the Web client's workspace and use Internet Explorer's print preview functions.

- **Windows client: From the list of reports**

   a. Display the reports (**Administration/ Reporting/ Reports** link on the navigation bar).

   b. Display the report detail.

   c. Click **Preview**.

   d. To configure the printer: Click the 📦 icon.

- **Windows client: Via the File/ Print menu**

  a. Select the **File/ Print** menu item.

  b. Populate the **Type** field with the value **Non-contextual report (SAP Crystal Reports)**.

  c. Select the report in the **Report** list.

  d. Click **Preview**.

  e. To configure the printer: Click the icon.

- **Windows client: With automatic refresh**

  a. Select the **Tools/ Reporting/ SAP Crystal Reports statistics** menu.

  b. Populate the **Nature** field if you want to filter the list of reports (list to the right of the **Nature** field).

  c. Select the report in the list to the right of the **Nature** field.

Chapter 7: Planner viewer

This chapter includes:

> **Caution:** 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.

Where the planner viewer is shown by default

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

- **Employees and departments** (amEmplDept): **Absences** tab, **Preview** sub-tab lets you view absences.

- **Employees and departments** (amEmplDept): **Delegations** tab, **Preview of granted delegations** and **Preview of received delegations** sub-tabs allow you to view the delegations

- **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 Asset Manager Application Designer.

- A wizard using Asset Manager.

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).

Use the planner viewer page

Planner viewer - layout
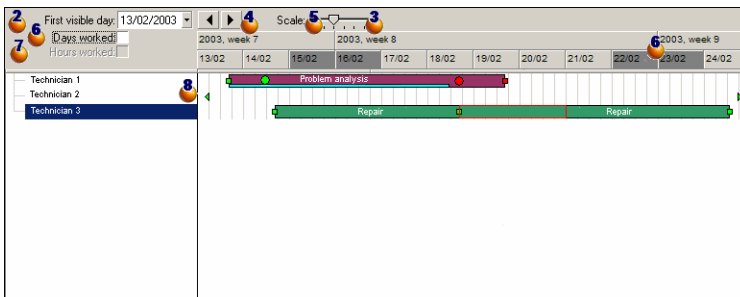
1. Start by selecting all the records whose schedules you want to view (from the record list which is not shown in the screenshot).

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

3. 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.

4. To move the time scale left (to go back in time): Click [◀] or activate the [8] frame then roll the mouse wheel upwards.

5. To move the time scale right (to go forward in time): Click [▶] or activate the [8] frame then roll the mouse wheel downwards.

6. 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 [3] allows it.

7. Select the option **Hours worked** to hide the hours not worked. The option **Hours worked** can only be selected if the scale [3] allows it.

8. Graphical representation of events relating to the records selected in the list [1]:

    ○ 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.

        • **Display the ToolTip**
        When you place the pointer over the bar [____], a ToolTip is displayed to provide key information about that event.

        • **Change the duration of an event**
        To change the duration of an event, move the bar [____] without changing its size, 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.

        • **Modify the start date of an event**
        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.

        • **Modify the end date of an event**
        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.

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

        • **Display the event details**
        To display the detail of an event in a new window, double-click [____].

- **Reassign a work order to another technician**

   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** 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.

  - **Position of the square**

    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.

  - **Color of the square**

    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.

   Caution: 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:

Step 1 - Create the group

1. Launch Asset Manager.

2. Connect to the demonstration database.

3. Display the list of groups via the **Organization management/ Operations/ Employee 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 **Organization management/ Organization/ Employees and departments** link on the navigation bar.

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	Bercher, Georges	Valentine, Michael
Groups	Group members	EmplGroups	Technical Support	Technical Support

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

Step 3 - Creating the work orders

1. Display the list of work orders (**Asset lifecycle/ Work orders/ 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	INTER900002	INTER900004
	Notified on	dtNotif	2010/10/14 16:40:00	2010/10/14 16:40:00
	Expected resol.	dtResolLimit	2010/10/30 18:00:00	2010/11/11 18:00:00
General	Type	seType	Internal maintenance	Internal maintenance
General	Title	Title	Prepare hardware, basic system installation and se	Install hardware and network connectivity
Tracking/ Technician	Int. technician	Contact	Bercher, Georges	Valentine, Michael
Tracking/ Scheduling	Planned start	dtSchedFixStart	2010/10/30 8:00:00	2010/11/4 8:00:00
Tracking/ Scheduling	Planned end date	dtSchedFixed	2010/11/1 18:00:00	2010/11/6 18:00:00

Step 4 - Viewing the schedule of the two work orders

1. Select both work orders **INTER900002** and **INTER900004**.

2. Select the **Preview** tab.

Planner viewer - Example with work orders
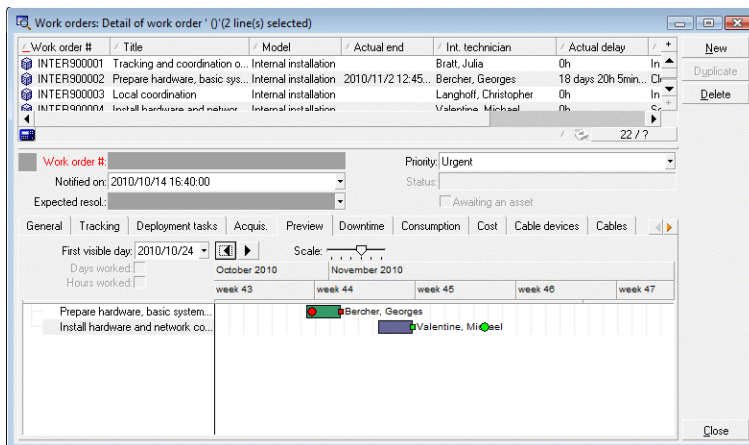
3. Use the **Scale** slider and the ◀ and ▶ buttons to view the entire period covered by the two work orders.

   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 **INTER900002** 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 **INTER900004** 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 (**Asset lifecycle/ Work orders/ Work orders** menu).

2. Select both **INTER900002** and **INTER900004**.

3. Select the **Preview** tab.

4. Select the bar ▭ of **INTER900002** 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 **INTER900004**. 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.

Customize 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.

Chapter 8: Reference information

This chapter includes:

Connections

Create a connection to a database

Windows client

1. Start the Windows client.

2. Select the **File/ Manage connections** menu.

3. Click **New**.

4. Populate the **Connection** tab:

   a. Enter the connection **Name** that appears in the **Connect to a database** dialog box.

   b. You can use the **Description** field to briefly describe the connection.

   c. 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 **Server** name, on which the database is stored.

- ○ **Database** is the name of the ODBC connection (IBM Database Universal Server or Microsoft SQL Server).

- ○ **Authentication Type** enables you to select the authentication type: either Database or WebService.

- ○ **WebService** is the HTTPS URL of the Asset Manager Web Service, for example:

  `https://<ServerAddress>:8443/AssetManagerWebService`

- ○ **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.

- ○ **Password**

- ○ **Owner** of the database. Prefixes the SQL commands sent to the database.

- ○ **Passphrase** is a predefined secret passphrase used for the WebService authentication type.

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 Asset Manager version.

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

> **Note:**
>
> - The **Owner** field allows you to authorize database logins (the **User** field) not belonging to the tables. In this case, all SQL statements sent to the database are prefixed. For example, if the database owner is "Joe", the SQL statement "select a from b" becomes:
>
>   `SELECT Joe.a FROM Joe.b`
>
> - The **File/ Manage connections** menu item does not allow you to create a database. You must use Asset Manager Application Designer.

Web client

This functionality is not available in the Web client.

Delete a connection to a database

Windows client

This action does NOT destroy the database.

1. Start the Windows client.

2. Select the **File/ Manage connections** menu.

3. Select the connection to be deleted.

4. Click **Delete**.

Web client

This functionality is not available in the Web client.

Performance of Asset Manager

If you use Asset Manager on a low-speed network, some items (images in particular) might take some time to display.

To improve program performance, you can make a local copy of these large objects on the client workstation's local drive. This copy is named 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, database structure, and so on) 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**

  a. Use the **File/ Manage connections** menu to display the list of connections.

  b. Select an existing connection, or create a new one.

  c. In the **Cache** tab, select the **Enable disk cache** check box.

  d. Use the for cache button to select the **Local folder for cache**.

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

- **Web client**

  This functionality is not available in the Web client.

Actions

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

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:

  a. Select the **Tools/ Actions/ Edit** menu to view the list of actions.

  b. For an action whose **Context** field (SQL name: ContextTable) indicates a table of reference, click **Test**.
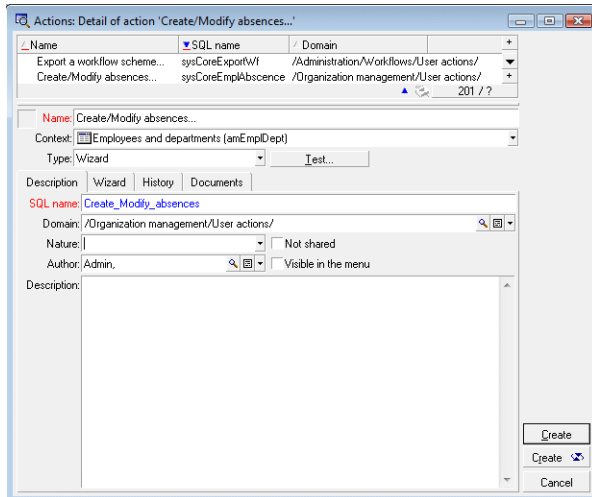
  c. In the window that appears, choose the **Context** of application of this action from among the records in this table proposed by the drop-down list.

  d. Click **Test**.

- 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 of the navigation bar 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.

Messages

The different users of Asset Manager 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 Asset Manager 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.

Asset Manager Application Designer

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/ Update 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

Alarms can be programmed for fields that have the alarm icon (Windows client) or (Web client) displayed to their right.

Alarms launch actions in Asset Manager's table of actions.

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

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

Asset Manager 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 Asset Manager'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 Asset Manager 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.

To define an alarm for a date field

1. Web client: The record must have already been created and displayed in **view** mode (not **edit**

mode).

2. Display the tab which has the date field.

3. Click the ![icon](Windows client) or ![icon](Web client) icon.

4. Populate the detail of the alarm.

5. Exit the alarm detail.

6. Save the record's detail.

To be able to define an alarm for a date field

See **Tailoring** guide, section **Customizing databases** chapter **Customizing the database**, section **Customizing existing objects/ Customizing objects/ Customizing a field, a link or an index/ Customizing with Asset Manager Application Designer/ To be able to define an alarm for a date field**.

Mouseless navigation

Windows client

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

Web client

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, Asset Manager 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.

Send documentation feedback

If you have comments about this document, you can contact the documentation team by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on User Interface (Asset Manager 9.61)

Just add your feedback to the email and click send.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to ovdoc-ITSM@hpe.com.

We appreciate your feedback!