AssetCenter™
Version 3.5

Reference Guide:
Introduction

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Peregrine
S Y S T E M S ®

The Infrastructure Management Company™

AssetCenter and InfraCenter for Workgroups data integrity

AssetCenter and InfraCenter for Workgroups are extremely rich in functionality. This richness relies on a complex database structure: The database contains a large number of tables, fields, links and indexes; certain intermediary tables are not displayed by the graphical interface; certain links, fields and indexes are automatically created, deleted or modified by the software.

Only the interfaces designed for AssetCenter and InfraCenter for Workgroups (graphical interface, APIs, import program, Web interface and gateways) are capable of modifying the database with respect to its integrity. **You must never modify the structure and/or the contents of the database by any means other than those intended for use with the software**; such modifications are highly likely to corrupt the database and bring about symptoms such as involuntary loss or modification of data or links, creation of "ghost" links or records, serious error messages, etc. Alterations to the database resulting from manipulations of this type void the guarantee and technical support provided by Peregrine Systems.

Environments supported by AssetCenter and InfraCenter for Workgroups

The list of environments supported by AssetCenter and InfraCenter for Workgroups can be found in the manual entitled "Installation and Upgrade Guide". Using AssetCenter or InfraCenter for Workgroups in environments other than those for which it is intended is done at the user's risk. Alterations made to the database resulting from using AssetCenter or InfraCenter for Workgroups in environments other than those for which it is intended void the guarantee and technical support provided by Peregrine Systems.

Foreword

Presentation of AssetCenter

AssetCenter is a comprehensive IT infrastructure management system with integrated areas of functionality, based on a shared repository:

- Asset Management.
- Procurement Management.
- Leasing Management.
- Cost Management.

Its "integrated" dimension allows you to access all functionality via a unified interface and use a single database, thus avoiding data redundancy.
Its "functional" aspect allows you to adapt the user interface according to your needs. You may simplify the interface by selecting only those areas of functionality you wish to use.

Objectives of the reference manuals

These manuals provide detailed, systematic explanations of AssetCenter's functionality.

They are also available in the form of the on-line help, which has more or less the same contents.

There is a document that contains a table of contents and an index for all of these manuals.

Objective of this manual

This manual describes in detail:

- The AssetCenter repository: locations, departments and employees, companies, floor-plans, features and documents.

- The general ergonomics of the software: Connecting to an AssetCenter database, displaying, entering, searching and processing information, customizing a client, printing, exporting, etc.

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Conventions

The following notation is used for commands:

[ ]	Square brackets denote an optional parameter. Do not type them in your command. Exception: In BASIC scripts, square brackets are used to denote the data access path and must be included in the script: **[Link.Link.Field]**
< >	Brackets denote a parameter in plain language. Do not type them. Substitute the text with the appropriate information.
{ }	Curly brackets denote a series of parameters. Only one of these parameters may be used. Do not type these curly brackets in your command.
|	A pipe is used to separate a series of parameters contained within curly brackets.
*	An asterisk added to the right of square brackets means that the formula shown can be repeated several times.

The following text formats have given meanings:

Fixed width characters	DOS command.
Example	Example of code or command.
...	Code or command omitted.
Object name	The names of fields, tabs, menus and files are shown in bold.
Note	Important note.

Send us your comments

We want to deliver the most accurate documentation possible.

Any comments would be greatly appreciated.

Send any remarks to **documentation@peregrine.com**.

Table of contents

Chapter 1 - Connecting to an AssetCenter database

This chapter explains how to connect to an AssetCenter database.

You will find information on the following topics:
- Creating a connection to a database
- Deleting a connection to a database
- Connecting and disconnecting
- Using a local cache to improve the performance of AssetCenter

Creating a connection to a database

All users of AssetCenter can create several connections to a given database, under different names.

To create a database connection:
- Select **File/ Manage connections**.
- Click New.
- Populate the **Connection** tab:
  - ❖ Enter the connection **Name**. This is the name displayed in the dialog box of the **File/ Connect to database** menu item. It is also used to start AssetCenter and to execute an import script from the MS-DOS prompt.
  - ❖ Select the database engine.
- Enter the information specific to the engine.
- Click Create.

You can use the Test button to:
- Test the connection to the database.

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

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

The following table summarizes the information required for each database engine:

	Microsoft SQL Server	**Oracle**	**Sybase SQL Anywhere**	**Sybase SQL Server**
Data Source	ODBC Data Source providing access to the database		ODBC Data Source providing access to the database	
Server		Name of the Oracle server where the database is stored For example, in SQL Net 1: ❖ P:ORACLE:ORCL for an ORACLE server based on the "named pipes" protocol ❖ T:ORACLE:ORCL for an ORACLE server based on the "TCP/IP" protocol		Name of the Sybase SQL Server where the database is stored
Database	Name of the ODBC connection			Name of the database
Account		Name of the Oracle account used for the connection. Used as a login.		Name of the Sybase SQL Server used for the connection. Used as a login.
User	Specify the login name used to access the Microsoft SQL Server database		Specify the login name used to access the SQL Anywhere database	
Password	User or account password				
Owner	Owner of the database being used. Prefix SQL statement sent to the database.				

Remarks:
- The **Database** field is used for the "Sybase SQL Server" and "Microsoft SQL" servers:
  - ❖ with "Sybase SQL Server", the server name is independent of the database name.
  - ❖ with "Microsoft SQL Server", if the database name is entered, it must be identical to the name of the ODBC connection.

- The **Owner** field allows you to authorize database logins (the **User** field) that are not owned by 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 AssetCenter Database Administrator.

Deleting a connection to a database

This action does NOT destroy the database.

↳ Select **File/ Manage connections**.
↳ Select the connection to be deleted from the drop-down list.
↳ Click [Delete].

Connecting and disconnecting

Connecting to a database

To open an existing database:

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

- In the **Database** field, select one of the connections defined by the administrator.

- In the **User** field, enter your **Login** name (SQL name: UserLogin) defined by the administrator in the **Employees** table (SQL name: amEmplDept). If you want to log on as the administrator, enter "Admin".

- Enter your password in the **Password** field. The first time you open the database, this must be the password you were assigned by the administrator. Afterwards this can be a password you defined yourself, because you can modify your password after opening the database using **Tools/ Change password**.

> Note:You can only open one database at a time in a given AssetCenter session.

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

Disconnecting from a database

Use **File/ Disconnect from database** to close an open database.

Using a local cache to improve the performance of AssetCenter

If you use AssetCenter on a low-speed network, displaying certain elements (images in particular) may be slow.

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

How it works

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

Creating a cache

To create a cache:

↳ Use **File/ Manage connections** to display the list of connections.
↳ Select an existing connection, or create a new one.
↳ In the **Caches** tab, select the **Enable disk cache** check box.

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

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

Clearing a cache

Click the [Clear cache] button to clear a cache. This deletes the contents of the local cache directory, but does not disable the cache.

Use this capability when you need to make room on your local hard disk.

Chapter 2 - Using AssetCenter

This chapter explains how to use AssetCenter.

You will find information on the following topics:

- Launching AssetCenter
- Exiting AssetCenter
- General ergonomics of AssetCenter
- Record lists
- Record details
- Creating and modifying records in the database
- Populating fields with values
- Keeping history of record modifications
- How to use alarms
- How to use the on-line help
- Dealing with error messages

Launching AssetCenter

There are two ways to launch AssetCenter:
- From Program Manager (under Windows 3.x) or the**Start** menu (under Windows 95, 98, and NT).
- From the command prompt.

Launching from the command prompt

Here is the syntax for launching the 32-bit AssetCenter client:

```
aam32 [- ?|h|H] [-cnx:<connection>] [-login:<login>] [-
password:<password>] [-view:<view>] [-config:<config>]
```

Here is the syntax for launching the 16-bit AssetCenter client:

```
aam16 [- ?|h|H] [-cnx:<connection>] [-login:<login>] [-
password:<password>] [-view:<view>] [-config:<config>]
```

Parameters:

- **-?, h or H**: Displays this 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 name of the employee connecting to the database (**Login** (SQL name: UserLogin) field in the **Profile** tab of the employee detail, which is displayed using the **Repository/ Departments and employees** menu item.)
- **-password**: password corresponding to the login (**Password** (SQL name: LoginPassword) field in the **Profile** tab of the employee detail, which is displayed using the **Repository/ Departments and employees** menu item.)
- **-view**: View displayed at startup (views available in the **Tools/ Views** menu item.)
- **-config**: functions to launch:
    - ❖ itam: Asset Management,
    - ❖ procurement: Procurement Management,
    - ❖ lease: Leasing Management,
    - ❖ finance: Cost Management,
    - ❖ admin: Administration functions.

To activate several functions, separate them by commas.

Example:

```
aam32 -cnx:database -login:user -password:MyPassword -
group:PentiumMachines
```

You may not use spaces in the text strings (e.g.: The database connection name may not be "Connection name".)

Launching multiple sessions

It is possible to launch several sessions of AssetCenter on the same machine. To do this, hold down SHIFT while launching a new session and keep this key held down until the additional session is fully loaded.
In this case, active sessions share the same **.ini** files.

Exiting AssetCenter

Use the **File/ Exit** *menu item to exit AssetCenter.*

You can do this at any time.

This has the following effects:
- Closes all open windows and saves their position.
- Offers to back up records being modified.
- Offers (Administration accounts only) to save any modifications made to the database.
- Closes the database and frees the connection with the database engine.
- Frees the connection slot of the person who was connected.
- Exits the application.

This menu item is similar to the **File/ Disconnect from database** menu item, except that it exits the application.

General ergonomics of AssetCenter

This section explains how to find your way around the AssetCenter workspace and how best to use the capabilities for manipulating database records. The workspace is AssetCenter's main window. It is always displayed and contains all the other windows.

You will find information on the following topics:
- Menus
- Toolbar
- Status bar
- Tooltips

- System information, installed and recognized components

Menus

The menu bar

All the AssetCenter commands are accessible from the menu bar. Commands are grouped by function (**File**, **Edit**, **Repository**, **Finance**, etc.) Each function has its own entry ("menu item") in the menus. Menu items may be activated with the mouse or the keyboard.

To activate a function using the keyboard:
- Press the Alt key followed by an underlined letter to select the menu you want.
- Then type the underlined letter of your menu item in the pull-down menu.

Context sensitive popup menu

To access a selection of commands related to your current activities (a popup menu), simply position the mouse cursor in the appropriate area of the screen and click the right mouse button. AssetCenter displays a list of commands and options and you can select the one you want.

Specific menu

Since there are many menu entries, we have chosen only to show certain menus when they are required. These menus are only needed when certain windows are displayed, such as a list window.

These specific menus are displayed in the menu bar to the right of the **Edit** menu. Only the specific menu for the active window is displayed.

Specific menus are used in particular to display filters on lists.

Toolbar

If you have a mouse, you can use the toolbar.

It lets you access AssetCenter commands without using the menu bar. It lets you work faster and more visually. Click the icon of your choice. When the mouse passes over an icon, a tooltip appears indicating the command corresponding to the icon.

The **Tools/ Options** *menu item,* **General** *tab lets you determine whether or not to display the tooltips.*

You can configure the toolbar with the **Tools/ Customize toolbar** *menu item.*

Status bar

A status bar at the bottom of the AssetCenter workspace displays information on the current context (highlighted menu item, active field or window, etc.) It includes from left to right:

- Information on the field or the active zone, or on the highlighted command
- The name of the open database and the login used
- The operating mode (browse, create, modify)
- The time of day

Tooltips

When the mouse pointer comes to rest over certain areas, in particular over icons and buttons on the toolbar, a tooltip appears to indicate which tool it is.

Use the **Tools/ Options** *menu item,* **General** *tab to enable or disable tooltips.*

In the screens showing lists, if a value within a column is cut-off, if you leave the cursor over it for a moment, a tooltip will by displayed showing the text in full.

System information, installed and recognized components

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

To display the About Peregrine AssetCenter dialog box, use **Help/ About**

This box contains basic information about AssetCenter. If an Internet browser is installed on your workstation, you can visit the Peregrine Systems Web site by clicking the **http://www.peregrine.com** hypertext link.

When you click , you can see the packages installed and recognized by AssetCenter.

This screen includes:

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

- Click to copy this information to the Clipboard. Click to close the window displaying installed and recognized packages.

Record lists

This section explains how to access record lists in AssetCenter and how to use them.

You will find information on the following topics:

- How lists work
- Using lists
- Moving within lists
- Action buttons concerning record lists
- Displaying in table view or tree view
- Configuring main lists

- Configuring drop-down lists
- Searching for a record in a list
- Manipulating records in a list
- Rapidly displaying a list with its default parameters
- Modifying the hierarchic organization of a table
- Hierarchy
- Exporting a list

How lists work

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

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

Using lists

A list is a window that displays all the records of a given type. It lets you search for records, modify them and display detailed information on one of them.

To display a list, use the button on the toolbar or the menu item corresponding to the type of records you want to use.

Creates a new item

Duplicates the selected item

Deletes the selected item

To move in the list:
- goes to the first item in the list
- goes up one page
- goes up one line

Scroll bar to scroll the list.

Asset list

Brand	Model	Category	Asset Tag	Status
Compaq	Deskpro 5/90 FD 1.44 M	PC	PCGURJLR	Normal
Compaq	Prolinea 4/66 DD630 8Mb	PC	PCGURYDY	Normal
Compaq	ProSignia 500 P120 DD2Gb 16N	PC	AORD9	New
Compaq	14 '' Multiscan color	Monitor	MON11	New
Compaq	Prolinea 4/66 DD630 8Mb	Hardware	MAT1	
HP	14 '' Multiscan color	Monitor	MON5	Normal
HP	14 '' Multiscan color	Monitor	MON6	Normal
HP	SureStore Tape 12000 autoload	Storage - Backup	DAT12	New
IBM	Aptiva 941 Pentium 100	PC	PCFFFFA354A669	Normal
IBM	Aptiva 914 486 DX2/66 8/540	PC	PCGURDGS	Normal

New
Duplicate
Delete

Details
Close

To move in the list:
- goes down one page
- goes down one line
- goes to the last item in the list

Displays all information on the selected item

Closes the list

Using the asset list

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

Moving within lists

There are several methods for moving within a list. They apply to both main lists (list of assets for example) and to tab lists (contracts concerning an asset, for example.)

You have four ways to move within a list:

Edit Menu

- First record: **Edit/ First record**
- Next record: **Edit/ Next record**
- Previous record: **Edit/ Previous record**
- Last record: **Edit/ Last record**

Function keys

- Next record: F12
- Previous record: F11
- Start of list: CTRL+F11
- End of list: CTRL+F12

Keyboard

- First record: HOME
- Next record: DOWN ARROW
- Previous record: UP ARROW
- Last record: END
- Up one page: PAGE UP
- Down one page: PAGE DOWN

Scroll bars

A vertical bar called a "scroll bar" appears to the right of each list. To move around the list, click this bar with the mouse. You can scroll through the list without changing the selected record:

Click on the arrow to display the preceding record.

Click on "+" to load the preceding records in memory.

Click here to move up a page.

Select and drag the scroll bar to move about within the records loaded in memory

Click here to move down a page.

Click on the arrow to display the following record.

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

Click on "+" to load the following records in memory.

Tools to sort and move within lists

If you use a wheel mouse (such as the Microsoft™ IntelliMouse™), you can use the wheel to scroll within record lists.

The ⊞ button

AssetCenter loads into memory the number of records you define in the **Tools/ Options** menu item, **Lists** tab. What is loaded in memory does not necessarily represent all the records of the table being displayed.

The ⊞ button allows extra records to be loaded according to the options set in the **Tools/ Options** menu item, **Lists** tab. Depending on whether

the ⊞ button is above or below, AssetCenter loads the preceding or following records.

To load all the preceding or following records, hold the "shift" button down and click the ⊞ button.

The ⟨ 20 / ? ⟩ button

This 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 launch the calculation.

Action buttons concerning record lists

New Displays an empty detail window to describe a new record. The record is not created until you click the **Create** button.

Duplicate Copies information from the selected record to a new detail window. The record is not created until you click the **Create** button.

Close Closes the window.

Delete Deletes the selected record.

Detail Displays the details of the selected record.

Select When you click the ▤ button to the right of a field that has been populated by selecting a record from another table, AssetCenter displays a "Selection window". This window contains a list of records. Select the record to link and click the **Select** button to confirm the link. The ▤ button is only displayed if the **Selection windows** field in the **Tools/ Options** menu, **Navigation** tab has been configured accordingly.

Displaying in table view or tree view

In some cases records are organized in a hierarchy (assets, locations, categories, departments and employees for example.) In this case, you have two ways of displaying records: In table view or in tree view.

The display mode is selected as follows:

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

Using the popup menu (right-click in the list zone) **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 contract 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 hierarchic levels you want to see displayed: one, two, three or all.

These settings are not saved when you close the window containing the tree view. If you want tree views to be "folded" or "unfolded" by default, configure the **Initially collapsed** field in the **Tools/ Options** menu item, under the **Lists** tab.

displays the list of items as a tree view.

displays the list of items as a list.

The keyboard shortcuts associated with the display mode are as follows:
- List view: CTRL+L
- Tree view: CTRL+T

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

Configuring main lists

Configuring lists according to their display context

It is possible to have different configurations for lists corresponding to the same table, depending on their context.

Example: You can display the list of assets from the **Assets** tab of a contract. Simply click ✚ in the **Assets** tab of the contract detail, then click ▤ in the window used to add an asset to a contract (display the ▤ button using the **Tools/ Options** menu item, **Navigation** tab).

The configuration of the list of assets that is displayed in the **Assets** tab of a contract detail may be different from that displayed by the **Repository/ Assets** menu item.

Rapidly sorting a main list

List title buttons allow you to select a single sort key.

Click here to sort the list according to the name field.
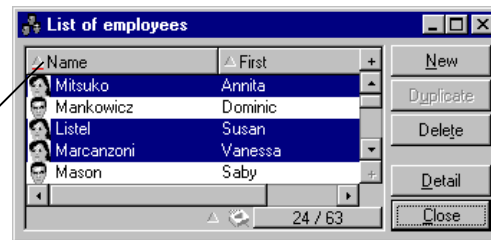
List sort tools

Click [▲] to sort a column if this has not already been done. The default sort order is ascending. To use a descending sort directly, hold the SHIFT key down and click.

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

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

The ◿ icon at the bottom of the screen changes to blue ▲ if a sort is applied "in the background" (i.e. sorts applied via the **Configure list** popup menu item).

Quickly adding a column to a list

You can add a column to a list from a detail screen. Right-click the object (field or link) that you want displayed as a column and select "Add this column to the list".

Adjusting the size of columns in main lists
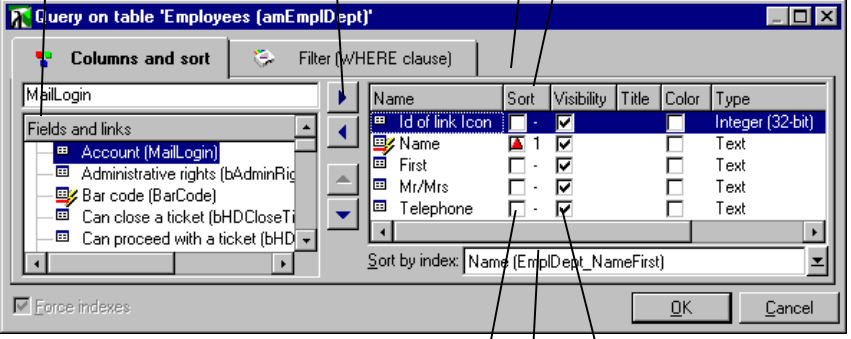
When the list is active, press the F9 key to redistribute the space that is unused by the columns to the right of the window.

If you double-click the right border of a column, AssetCenter automatically adjusts the column size. All the values contained in the column are shown in full. This operation is also available via CTRL+F9.

Using the Configure list popup menu item

This command is linked to the display of the ▲ indicator at the bottom of the list.

The **Columns and sort** tab allows you to define multiple sort keys.

Full database dictionary.

These buttons allow you to transfer columns between the list on the left and the list on the right.

List of columns selected to be sorted or displayed.

Check the boxes corresponding to the fields that will be used as sort keys. Check them in their order of priority.

These buttons allow you to modify the order in which columns are displayed: The columns that is listed first will be displayed to the left of the record list.

Check this box to effectively display the column in the list.

To use indexed sorts, which are more rapid, select an index in the table. This modifies the table that is shown above by adding the missing columns and checking the "Sort" box.

Configuring how lists are displayed

List on the left

This hierarchic list contains all the elements of the table that are available for sorting or displaying. 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.

The information used to describe the database dictionary (label, description, SQL name) can be configured using the **Tools/ Options** menu item, **Display** tab, **Display dictionary item** frame.

Box at the top left of the list

This box allows you to access an object in the database dictionary by entering its SQL name. AssetCenter automatically types ahead for you.

← → buttons

These buttons allow you to transfer columns between the lists and the left and right columns.

↓ ↑ buttons

These buttons allows you to modify the order in which columns are displayed: The highest column in the list on the right will be the first on the left in the list of records.

Note: Double-clicking in the window on the left adds the corresponding column; double clicking in the window on the right removes the corresponding column.

List on the right

This list contains the items selected for sorting or display.

Sort column

The sort can be ascending or descending. To change the order, click several times on the sort box.

It is possible to specify several sort keys. In this case, they are ordered hierarchically. For example, in the table of assets, an initial sort can be

performed on the brand and a second on the model for products of the same brand. Simply select the sort keys in the appropriate order.

If the selection of sort keys corresponds to an index (**Sort by index** field), AssetCenter automatically displays the name of that index.

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

Visibility column

Indicates whether or not the column should appear in the list.

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

Type column

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

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, which defines the color used to display lines of text in the list.

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

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

For example:

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

To do this:

> Create a calculated field (**Tools/ Administration/ Calculated fields** menu item, with the following parameters:

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

Calculation script (SQL name: memScript)	If amDateDiff([dEnd],amDate) < 7776000 Then
	   RetVal = AmRgbColor("RED")
	Else
	   RetVal = AmRgbColor("BLACK")
	End If

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

↰ Configure the list using the **Configure list** command from the popup menu.

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

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

↰ Confirm this configuration.

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

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 (check box in the **Sort** column) one by one the columns in the list above the field.

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.

Configuring drop-down lists

Drop-down lists (combo boxes) are lists that are displayed when you click the arrow button to the right of certain fields in a detail screen.

A drop-down list can be displayed as a list or a hierarchy (configured via the **Tools/ Options** menu item, **Navigation** tab, **Trees in drop down lists** field).

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

Searching for a record in a list

When you have sorted a list on a field containing the value you want to locate, you can start the search for that item:

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

Note: The keyboard shortcut equivalent to the **Go to** command is "Ctrl G".

Other ways to search records

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

Manipulating records in a list

Selecting one or more records in a list

Selected records are displayed as 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.

Selecting all the records in a list

Once the list is open, use the **Edit/ Select all** menu item to select all the records in the list.

It does not matter whether you are placed in the list or the detail of one of the records.

Deleting records

Once you have selected the records to be deleted, click the [Delete] button to remove them from the list. If these records are not linked to records in other lists, the system displays an error message. If not, AssetCenter will delete them. Before deleting a record, think about the consequences of its deletion, because this operation cannot be undone. Could this be a record created in the database by mistake, an item that disappeared from your inventory, or an element added to stock? Perhaps the item's status should be changed, or it should be moved to another location in the database, rather than being deleted.

Moving a record in a tree view list

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. This has the same effect as modifying the **Sub-location** (SQL name: SubLocations) field of a location or **Component of** (SQL name: Parent) field of an asset for example.

Adding objects to a floor plan

When you define a floor plan you can add records to other lists by dragging and dropping the records.

First select the records in their list or by selecting their icons which appear in the detail window if there are any.

AssetCenter adds the object to the floor plan with its icon and text.

Move the records around the floor plan using the mouse.

Rapidly displaying a list with its default parameters

AssetCenter allows you to configure the way in which record lists are displayed:

- Display 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 (contextual menu item **Configure list**:
  - ❖ Selection of columns to be displayed
  - ❖ Sorts
  - ❖ Filters
- Application of filters
- Window size

These configurations are saved when you close the window.

You can modify one of these display parameters to return to the default settings. However, there is a quicker method: You just need to hold the SHIFT key down when you select the window's menu item with the mouse (for example: **Repository/ Assets**) or the corresponding icon in the toolbar. If you do this, the window is displayed with its default parameters.

Modifying the hierarchic organization of a table

- ✎ Display the hierarchic list to be modified.
- ✎ Display the list in tree view using the **Window/ Tree view** menu item.
- ✎ To make the list easier to read, you can display the list in "List only" mode using the **Window/ List only** menu item.
- ✎ If necessary, unfold the tree:
  - ❖ Either by clicking a node in the hierarchy.
  - ❖ Or by using the **Unfold** command in the popup menu. Right-click within the list zone to display the popup menu.
- ✎ Click the record at the base of the branch to be moved.
- ✎ Use the mouse to move it to the record to at the base of the destination branch.
- ✎ All the sub-items of the record you selected will be moved at the same time.

Or:

↳ Display the hierarchic list to modify in "List and details" mode (**Window/ List and detail** menu item.)

↳ Select all the records to be moved.

↳ Modify the field that lets you specify the parent record: Select the new parent.

↳ Click [Modify].

Hierarchy

Certain tables in AssetCenter are organized hierarchically. Each record can have a sub-record, sub-records can have their own sub-records, etc.

Records in these tables are therefore organized in a tree structure with a notion of hierarchy. AssetCenter does not limit the number of levels in the tree structure.

Examples:

- In the table of locations, a given location A, may be a "sub-location" of a given location B.

- In the table of assets, an asset may be a "component" of another asset.

- In the table of departments and employees, the "Sales head office" department has a sub-department called "Sales". "Sales head office" is the "parent" or "parent department" of "Sales". This creates a hierarchy: "Sales head office" -->"Sales" as shown below:

Exporting a list

To export a list or a list in a tab, you can also use the **File/ Export list** *menu item.*

Method

↳ Display the main list or the list in a tab you want to export. Go to this list. To export a main list, you can also display the detail of an item in the list to be exported and go to the basic information edit zone.

↳ Select **File/ Export list**.

↳ Populate the dialog box.

↳ Click Export .

AssetCenter exports records from the current list after any possible filters. The columns displayed on screen are exported.

List export screen

File field

Specify the name, extension and the path of the text file to which the exported data will be written.

Export the label of the table

Select this option in order for the label of the exported table to appear at the top of the export file.

Import note: We advise against exporting the label of the table if the export file is intended for use in Microsoft Access.

Export column headers

Select this option in order for the names of the columns to appear at the top of the export file.

Export the identification numbers

Select this option to export the identification numbers of the records exported, i.e. the "ID" field of the table (for example, the "lAstId" field in the case of assets).

Precautions

Make sure that you are in the main list or tab list that you want to export. In effect, if for example you want to export those assets covered by a given contract, but you are positioned in the basic information of the contract detail or in the list of contracts ("List and detail" view), you will export the list of contracts.

Note: The **File/ Export list** menu item is designed for all AssetCenter users; it allows the active list to be exported. AssetCenter Export allows

you to perform very complex export procedures, but only the AssetCenter administrator can use it.

Record details

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

You will find information on the following topics:

- Accessing a record detail
- Combined list and detail view
- Resizing windows
- Main buttons in detail screens
- Tabs
- User-defined fields

Accessing a record detail

Once you have displayed a record list, select the item you want, then double-click it or click the [Detail] button to display all information concerning this record. This information is divided into tabs organized by subject matter.

Use the arrows to display more tabs
to the left or the right.

Information concerning an asset is
grouped in tabs (general information,
asset features, maintenance, etc.) Click
on a tab to view the information.

Displays the
details of a linked
item.

Displays a simplified list of linked
items so you can select an item.

Displays a "selection window" (standard list
of linked items) so you can select an item.
The display of this icon is controlled by the
"Tools/ Options/ User Profiles" menu item.

Asset record detail

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

Use the horizontal arrows to display more tabs to the left or the right of the tab list.

Combined list and detail view

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

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

Display list only.

Display detail only.

Combined display of list and detail.

List zone.

Detail zone.
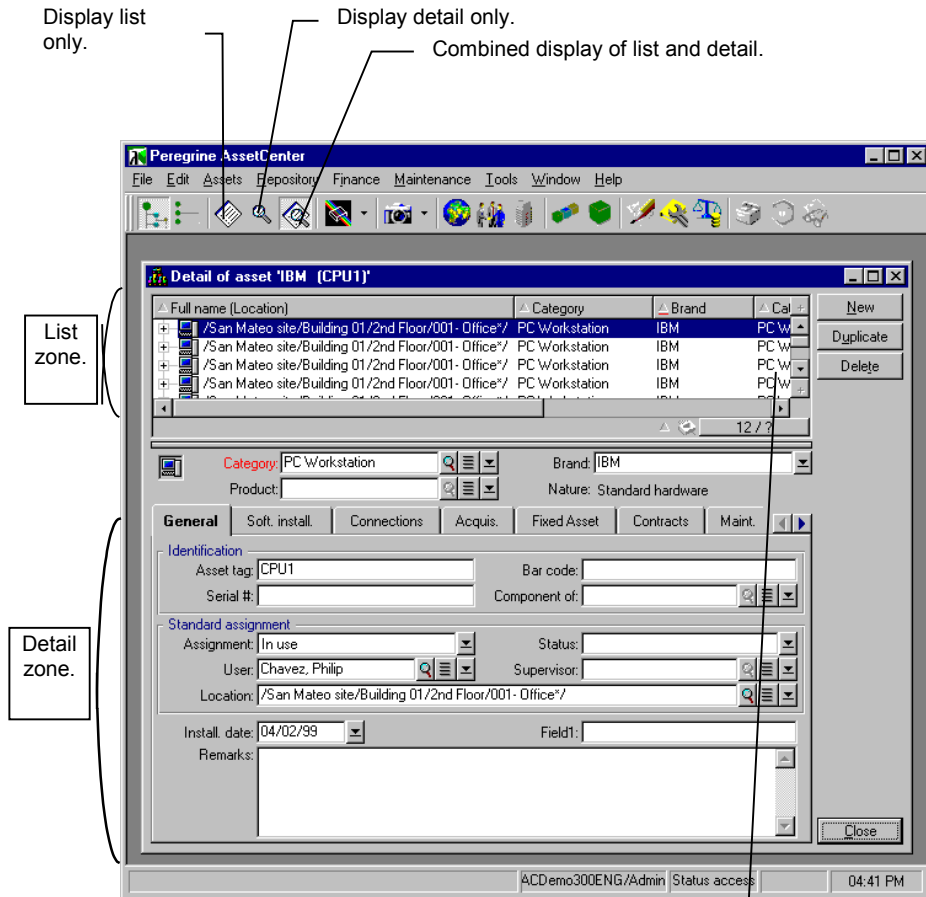
The display mode may also be selected via the popup menu by right-clicking in the list (or via the Windows menu.)

Combined view of list and asset detail

The following keyboard shortcuts are assigned to these modes:
- List only: "F6"

- Detail only: "F7"
- List+Detail: "F8"

In "List+Detail" mode, you have the option of displaying 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 the empty part of the detail screen (below the "New", "Duplicate" and "Delete" buttons) and select **Switch to horizontal mode** or **Switch to vertical mode** as needed.

Resizing windows

You can modify the size of most windows in AssetCenter.

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

To change the size of the list and detail areas, move the cursor to the line separating the list area from the detail area until the pointer changes shape. Then click the mouse and, while pressing the mouse button, move the pointer to the desired position. Then release the mouse button.

Main buttons in detail screens

Modify Saves modifications made to the detail window.

Create Saves the information in the detail window as a new record.

Create Saves the information in the detail window as a new record and initializes fields in order to create a new record based on certain current data items. The new record is not effectively created until you click the **Create** button. This button is useful when you are creating a series of records with similar information.

Cancel Cancels any modifications made to the detail window, or cancels the creation of a new record if you have not yet pressed the **Create** button.

Displays the details of the selected item.

Displays a "Selection list" that lets you select a linked record. You can control the display of this button in the **Navigation** tab of the **Tools/ Options** menu item. The list displayed is the standard list of linked records. The title of this list depends on its context. For example, if you select the user of an asset 'bbb', the list of departments and employees is

displayed but the window is labeled "User of asset 'bbb'", and not "List of employees".

⊟ Displays a simplified "Drop-down menu" that lets you select a linked record. Contrary to the ☰ button, the list displayed is not the standard one, but a list with a single column.

◀ Scrolls the tab list to the left.

▶ Scrolls the tab list to the right.

✚ Adds a record to a tab list. (For example, this may be the list of contracts concerning an asset. This list is in the **Contracts** tab of the asset details.)

Warning: The ✚ button is not displayed if the record has already been created in the database.

━ Deletes a record from a details list.

▦ Lets you make calculations.

⏰ Adds an alarm to the field to the left of the button.

Tabs

AssetCenter displays database record information in a "detail window". Information is grouped by type (e.g. features) in various sub-windows called "tabs".

Detail windows include several tabs.

Click the "tab" at the top of the detail window to display the tab's contents.
Tabs sometimes contain sub-tabs.

To add, duplicate or remove a sub-tab, right click within the tab that contains it in order to display the popup menu and select **Add linked record**, **Duplicate linked record** or **Delete link**.

The name of the sub-tab is defined by one of the fields within the sub-tab.

User-defined fields

AssetCenter includes user-defined fields to let you add information specific to your organization. These fields are found in detail windows. Their default name is "Field x" where x is a number.

The administrator may modify their names and properties using the database customization functions.

Creating and modifying records in the database

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

You will find information on the following topics:

- Modifying a record
- Creating a record in a list
- Duplicating a record
- Modifying a record linked to other records
- Updating the display
- Finding records created on the fly
- Modifying a selection of records
- Simultaneous modification of records by several users
- Modifying a large number of records

Modifying a record

You can modify information concerning a database record using the detail window (the information cannot be modified directly in the list.) The detail window contains two types of information:

- Direct information, which can be modified by simply typing in the field,
- Linked information which can be modified:
  - ❖ By selecting another value in the list either using the ▾ icon (for a simplified drop down menu) or using a ▤ icon (selection window) to the right of the field.
  - ❖ By typing another value in the field.
  - ❖ By using the ◨ button to the right of the field to display the details of the linked item. This lets you modify information concerning the linked item (for example, changing a supplier's telephone number.)

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

It is possible to modify a selection of records simultaneously. Select the records to be modified and click the [Detail] button. In the detail window AssetCenter displays:

- The fields containing the same information: white background,
- The fields containing different information: gray background.

Type directly into a field to modify its value.

Scroll the standard list to choose another user.

Scroll the simplified list to choose another user.
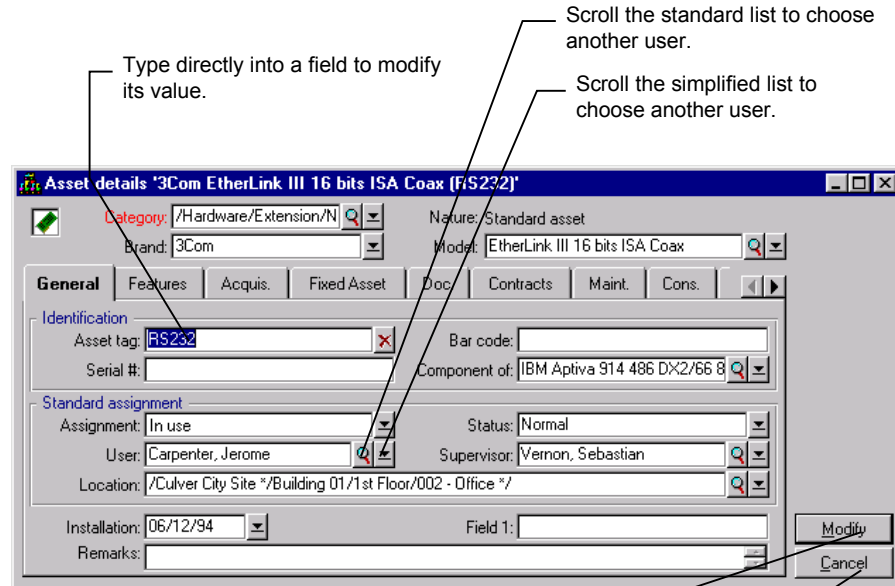
Confirms the new values.

Cancels the modifications.

Modifying an asset detail

Creating a record in a list

To create a new record, first display the list of records.

AssetCenter lets you create a record from an empty window by clicking the [New] button, or by copying the item selected in the list by clicking the [Duplicate] button.

Fill in the information concerning the item being created.

✋ When the value to be entered must be chosen from a list and you type the first few letters, AssetCenter automatically fills in the rest if there is a record in the database that starts with those letters. You can also scroll down the list of records using the ▾ button to the right of the field. If the value entered is not in the list, AssetCenter offers to create a new record in the linked table. You then have two choices:

❖ Create on the fly: AssetCenter creates a new record in the linked table, but does not display its detail. You can fill in the rest of the information later.

❖ Detailed creation: AssetCenter displays a detail window for this new record. You can enter the information concerning this new record immediately.

✋ When first creating a record, AssetCenter assigns default values to certain fields. These default values may be modified. If the default value refers to other fields (category, brand and model for an asset, for example) in the detail of the item being created, the program waits until those fields have been populated before displaying the corresponding part of the default value. The formulas that define these fields are only applied when the record is first created; they are not used when you modify a record.

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

Type the value directly
using the keyboard

Type the value directly using the
keyboard, or display the list of linked
items then select the desired item.

Displays the
details of the
linked item.

Adds a linked
item to the list.

Removes a
linked item from
the list.

Confirms the creation of the item.

Confirms the creation of the item and immediately
duplicates it. Use this button if you want to create
several similar items.

Creating a record

Duplicating a record

There are two ways to duplicate a record:

Using the Duplicate button

To duplicate a record:

- Select it from the list.

- Click the Duplicate button: AssetCenter creates a new record and
copies some of the information.

- Now you can modify and complete the details of the duplicated record before confirming the creation with the [Create] or [Create ⚙] button. Clicking the [Create ⚙] button is equivalent to successively clicking the [Create] button followed by the [Duplicate] button.

Warning: If you do not modify duplicated values that should be unique in the database, AssetCenter informs you that it cannot create the item.

Using *Edit/ Duplicate*

To duplicate a record:
- Select it from the list.
- Select **Edit/ Duplicate**.
- In the window that appears, set the number of copies you want to create.
- Start the duplication by clicking the [Duplicate] button.
- AssetCenter duplicates the record and creates the duplicated records in the database.

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

Warning: Before using the **Edit/ Duplicate** menu item, you must define the default values for mandatory fields and unique default values for "no duplicates" indexes.

Data items that are duplicated

The property of the "Reapply the default value in case of duplication" field or link determines whether AssetCenter should:
- Copy the source value,
- Apply the default value.

The "Reapply default value in case of duplication" property is defined with AssetCenter Database Administrator.

In particular, it is important to reapply the default value of a field when a counter is used.

Modifying a record linked to other records

Much of the information appearing in a record detail comes from other tables. The program creates links between records in different tables on the basis of this information, and the records are accordingly "linked". When you modify information in a record, all the records linked to that record are also modified. A database that operates on this principle is called "relational". This method offers the advantage of storing a minimum of duplicated information in the database, which saves time if the information is modified and also saves disk space.

Updating the display

While one user of AssetCenter is working, other users may have modified detail information, added new records, or deleted records.

There are two behaviors concerning updating:

First behavior

The modifications appear automatically if you display the list or the detail again, or if you confirm the changes made to a detail with the Modify button. But if you have already displayed a list or a detail window, the information modified by others is not automatically updated on the screen.

Press the "F5" key or select the* Window/ Update *menu item to refresh the screen.

The list is automatically updated if you apply a filter or sort the list, go from "tree" view to "list" view, or vice versa.

When you display the details of another record by moving in a list, the information on this detail is not necessarily up-to-date, even if the list has not been updated.

Second behavior

For certain tables, updating is processed specifically.

It is the case when the administrator (or a user with the appropriate rights) adds, deletes or modifies a record in one of the following tables:
- The table of itemized lists or itemized list values
- The table of features
- The table of currencies and exchange rates

- The table of calculated fields
- The table of business calendars
- The table of time zones
- The workflow table
- The table of actions

> The caches described here are different from the connection caches in the
> **Cache** tab of the "Manage Connections" screen.

Changes made to these tables by the administrator are only taken into
account at the workstation level in one of the following cases:
- The user disconnects then reconnects to the database
- The user selects the **Tools/ Refresh caches** command (keyboard
  shortcut "Ctrl+F5")

Example

If the administrator creates a new feature available for the table of assets
in the database, a user connected to this database will not be able to use
this feature before refreshing the caches or disconnecting and then
reconnecting to this database.

Options

The options in the **Caches** tab allow you to define the caches that will be
refreshed when the **Tools/ Refresh caches** command is selected.

Finding records created on the fly

In order to find those records which have been created on the fly and
need to be completed:

↳ Display the list of records in the appropriate table.

↳ Display the **On-the-fly creations** filter (use the table's specific
menu or the popup menu.)

↳ Check the **On-the-fly creations** box in the filter zone.

Modifying a selection of records

Modifications to database records are made in the detail windows (you
cannot make them directly in a list.) Display the list in "List and details"
mode and simultaneously select the records to be modified in the list.
AssetCenter then displays in the details window:

- The fields that contain the same information: white background,
- The fields that contain different information: gray background.

Simultaneous modification of records by several users

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

AssetCenter applies the following rules:

- Several users can edit (modify the information without clicking the ⬚Modify button) the same record with no restrictions and without receiving a message.
- When a user clicks the ⬚Modify button, 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 in the database is different from the value on the screen and the field is being modified by another user, the value on the screen is saved in the database.
    - ❖ If the value in the database is different from the value on the screen and the field has not been modified by this user, the value in the database is kept (it was therefore modified by another user in between.) AssetCenter updates the screen and displays the new value on the screen.
- If two users modify the same field on the same record, a warning message is given to the user who is last to confirm the modification. The last one to click ⬚Modify wins out.
- Technically, here is what happens when you click ⬚Modify :
  the record is locked for a fraction of a second to give the program time to write the information in the database. While the record is locked, no other user can write to the record. Other users may read the record, however.
- If a user edits a record and the record is deleted by another user in the meantime, the user who is editing the record receives an error message when they click the ⬚Modify button.

- For counters: Counters are incremented each time a user presses on the [New] button. If they cancel without confirming the creation and no one else has used the [New] button, the counter returns to its original position. If a user has pressed on the [New] button in the meantime, the counter is not decremented when the creation of the record is aborted (there will therefore be discontinuities). If two users click [Create] at the same time, AssetCenter issues two successive numbers.

Example:
- A user record in the AssetCenter database contains the following information:
  - ❖ Name: Smith
  - ❖ First name: Josephine
  - ❖ Position: Accountant
  - ❖ ID #: 001
- User 1 edits the following information in this record:
  - ❖ Name: Hudson
  - ❖ Position: Office manager
- User 2 edits the following information in this record:
  - ❖ Position: Financial manager
  - ❖ ID #: 002
- User 1 clicks [Modify] first, then User 2. The final result is:
  - ❖ Name: Hudson
  - ❖ First name: Josephine
  - ❖ Position: Financial manager
  - ❖ ID #: 002

Modifying a large number of records

There are two methods for modifying a large number of records:

- If you want to assign the same value to several fields, simultaneously modify selected records.
- If you want to modify field contents to a number of different values, use AssetCenter's export and import functions.

Simultaneously modifying a selection of records

AssetCenter lets you select several records in a list and modify them simultaneously. This is only useful if you want to copy the same values to several records.

Modifications are made in the detail zone, not in the list zone.

Importing and exporting data

The other solution, more complex but more powerful, involves exporting the records to modify them outside of AssetCenter, then importing them again once the information has been modified:

↳ Launch AssetCenter Export or export the list of records using the **File/ Export list** menu item.

↳ Make sure that the fields that uniquely identify each record during the import are included in the list and are not modified between the export and the import.

↳ Export the data.

↳ Modify the exported data.

↳ Import the modified data. Backup your database before importing. When you import the data, be sure to specify the keys that identify the records. The values of these keys cannot be changed between the export and the import, if they are they cannot be used to identify the records.

↳ Check the results in the database and look at the import report to make sure the import was successful.

It is prudent to backup the database before performing a mass import.

Populating fields with values

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

You will find information on the following topics:
- Automatically populating fields
- Cut
- Paste
- Copy

- Deleting text
- Date- Data-entry rules
- Durations- Data-entry rules
- Time- Data-entry rules
- Date + time fields- Data-entry rules
- Images

Automatically populating fields

AssetCenter allows you to populate certain fields with values automatically when creating a record.

> Note: This is only possible when you are creating records. As soon as you click the ⬚ Create button, the automatic data-entry mechanism disappears. This mechanism is not available for modifying records.

The selection of fields that call on automatic data entry mechanisms and which mechanisms are used is defined by the AssetCenter administrator:
- either by using AssetCenter Database Administrator.
- or by moving to the field to be configured and using the **Configure object** menu item in the popup menu. In this case, modifications are stored in the database:
  - ❖ either when you disconnect from the database and give a positive reply to the confirmation message,
  - ❖ or when you select the **Tools/ Administration/ Save database configuration** menu item.

You can then create a formula using fields, variables, constants, etc.

Special case of calculated fields

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

Special case of links to the *Comments* table (SQL name: amComment)

It is not possible to assign default values to links to this table.

Example: **Remarks** (SQL name: Comment).

Special case of linked records

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

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.

You can modify the default values.

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.

> Many tasks are carried out automatically by AssetCenter or AssetCenter Server. These automatic mechanisms often have priority over the default values of fields. They are described in the manual entitled "Reference Guide: Administration and Advanced Use", chapter ".ini files".

Cut

AssetCenter allows the user to:
- cut text.
- cut records in lists inside tabs.

Cutting text

To cut text and place it in the Clipboard, select the text to be cut and use the **Edit/ Cut** command. The text can be recovered from the Clipboard using the **Edit/ Paste** command.

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

Cutting in tab lists

This function is available for those lists appearing in certain tabs in detail windows (for example: the list of assets taken down on a lease, the list of assets at a location, etc.)

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

- ✥ Select the records to be cut.
- ✥ Use the **Edit/ Cut** command.
- ✥ Click Modify to record the operation.

Warning: Sometimes, only the link to a distant record is deleted, whereas the distant 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.

Paste

AssetCenter allows the user to:
- paste text.
- paste records in lists inside tabs.

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

Pasting text

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

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

Pasting in tab lists

This function is available for those lists appearing in certain tabs in detail windows (for example: the list of assets at a given location, etc.)

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

Precautions before pasting in a tab list

- The user cannot choose the associations between the fields to be pasted and the columns in the tab list. It is therefore important to prepare the data to be pasted so that it corresponds with the structure of the columns in the tab. For example, if you place yourself in the first column of the list tab, the data belonging to the first column to be pasted will be pasted in the first column of the tab list, the data from the second column to be pasted will be pasted in the second column of the tab list, and so on.

- It is important to place yourself in the column of the list in the tab from which you want to paste data and to 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 tab list, the records pasted replace the selected records. Don't forget to deselect the record in the tab list which is selected by default (by clicking while holding down the CTRL key) if you don't want it to be deleted from the tab list when the data is pasted.

- You can paste data in a tab list if there is a direct link between the table of the main list and each field of the table of the tab list. On the other hand, you cannot paste data in a tab list if there is no direct link between the table of the tab list and the main table. For example, you can paste data in the **Documents** tab of an asset, since the table of assets and documents are linked. However, you cannot paste data in the **Assets** tab of a contract. In effect, there is an intermediate table between the table of contracts and the table of assets, i.e. the table of assets under contract.

Copy

AssetCenter allows the user to:
- copy text.
- copy records in lists inside tabs.

Copying text

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

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

Copying records in a list

This function is available for those lists appearing in certain tabs in detail windows (for example: the list of assets taken down on a lease, the list of assets at a location, the list of features of an asset etc.)

To copy records from a main list or a tab 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.

Deleting text

AssetCenter allows the user to delete text.

To delete text without having to cut it to the Clipboard, use the usual keyboard strokes, or select the text and then use the **Edit/ Cut** command.

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

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.
- To separate the days, months and years, use one of the following characters: / , : ; or <space>.
- 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 + ;.

Year 2000: AssetCenter was designed from the outset to avoid all problems related to the year 2000. The "date" fields store information with enough accuracy to differentiate dates from the year 0 to 9,999.

Durations: Data-entry rules

Use the abbreviations recognized by AssetCenter:

- Seconds: **second|seconds|s|sec|secs**

- Minutes: **minute|minutes|mn|min|mins**

- Hours: **hour|hours|h**

- Days: **day|days|d**

- Months: **month|months|mon|mo**

- Years: **y|yrs|year|years**

You are not required to leave a space between the unit and the value.

You are not required to enter a unit. In this case, a default unit is applied. For example, the default unit used for work orders is the hour (duration fields in the **Scheduling** sub-tab in the **Tracking** tab of the detail of a work order).

The authorized units depend on the context. If you enter a value with a unit that is not authorized, it is converted to a unit that is. For example, duration fields in the **Scheduling** sub-tab in the **Tracking** tab of the detail of a work order only display hours or minutes. If you enter "1 month", AssetCenter replaces "1 month" with "720 hours".

All "Duration" type fields are stored in seconds.

For conversions, AssetCenter assumes a year to be 12 months and a month as 30 days (thus 1 year = 360 days).

Time: Data-entry rules

Hours, minutes and seconds are authorized.

Separate the units with a colon (":").

"Date + time" fields: Data-entry rules

These fields are processed differently from "Date" fields.

The entry format for a "Date+Time" field is:

```
Date[<Sep>[Time]]
```

Sep is a separator: . / ; , : -

Date is a string representing the date. Its syntax is as follows:
    xx<Sep>yy<Sep>zz

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

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

```
hour[<Sep>[minute[<Sep>[second[<Sep>[millisecond[<Se
p>]]]]]]]
```

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

The following rules are applied:

- Define the order for entering the month, day and the year via the Windows Control Panel. Use this order when entering dates.

- You must systematically enter a day, a month and a year.

- You are not required to enter leading "0"s before the years, months, or days in a date.

- You can enter the year using 2 or 4 digits (e.g.: "1995" or "95"). Numbers from 00 to 49 return 2000 to 2049. Numbers from 50 to 99 return 1950 to 1999.

- Use the CTRL+ SEMI COLON (;) keyboard shortcut to display the current date and time.

Year 2000: AssetCenter was designed from the outset to avoid all problems related to the year 2000. The "date" fields store information with enough accuracy to differentiate dates from the year 0 to 9,999.

Images

AssetCenter lets you attach three types of images:

- Bitmap files (with the **.bmp** extension) in 16 or 256 colors. Their advantage is that they can be displayed rapidly.

- 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.

Attaching and detaching records to and from records

The field in the top-left corner of record details is intended to hold images. To attach an image:

- Either double-click the area where it is to be inserted. AssetCenter displays a window which permits you to select the graphic file containing the image.

- Or right-click and select **Select image** from the popup menu.

To detach an image, place the pointer on the image and click with the right mouse button to display the popup menu. Select **Delete image**.

Storing images

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

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

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

Keeping history of record modifications

Modifications to certain fields and links in AssetCenter can be tracked.

The administrator must indicate that "history" is kept for these fields and links either using the **Configure object** popup menu item, or using AssetCenter Database Administrator.

As unorthodox as this method may be, it is also possible to add history lines manually by using the ⊞ button.

Use the ⊟ and 🔍 buttons to delete, view or modify history lines.

How to use alarms

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

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

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

Users of AssetCenter may 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 2 level alarms, the triggering of the second level depends on the first-level action.

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

How to use the on-line help

On-line help displays help messages on screen while you are using AssetCenter.

General on-line help

The general on-line help contains approximately the same information as the printed manuals.

To display it, simply press F1 from any point in AssetCenter.

Context-sensitive help for fields and links

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**: sample data.
- Important information: data entry precautions, automatic mechanisms, etc.
- System itemized list values.
- Linked tables.

There are two ways to access context-sensitive help:
- Move to the field or link, then simultaneously press the "SHIFT" and "F1" keys.
- Move to the field or link. Click the right mouse button, and select the **Help on this field** popup menu item.

The contents of context-sensitive help for fields and links is not included in the printed manuals.

Dealing with error messages

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

The error message window contains a $\boxed{\text{Save}}$ button, which allows you to save the error message as a file.

You can also copy the error message to the Clipboard by clicking $\boxed{\text{Copy}}$.

Using keyboard shortcuts

Executing certain functions can be facilitated by the use of keyboard shortcuts.

In Helpdesk Management, keyboard shortcuts that use CTRL + a letter will not work if the letter corresponds to a "Hotkey" used for a problem type.

Here is a summary:

Shortcut	Equivalent menu command	Context	Result
Navigating in lists			
F12 or Down arrow	**Edit/ Next record**	Cursor placed in a list or detail window.	Next record (taking any filters and sorts into account).
F11 or Up arrow	**Edit/ Previous record**	Cursor placed in a list or detail window.	Shifts the selection to the previous record (taking any filters and sorts into account).
Ctrl + F11 or Home	**Edit/ First record**	Cursor placed in a list or detail window.	First record(taking any filters and sorts into account).
Ctrl + F12 or End	**Edit/ Last record**	Cursor placed in a list or detail window.	Last record (taking any filters and sorts into account).
Page up		Cursor placed in a list or detail window.	Move up one page in the list (taking any filters and sorts into account).
Page down		Cursor placed in a list or detail window.	Move down one page in the list (taking any filters and sorts into account).
Ctrl + G	**Go to** popup menu command (right click)	Cursor placed in a list window, list sorted on the column in which you are searching for a value.	Searches the first record (taking any filters and sorts into account) starting with the letters entered in the search box.
Displaying list and record details			
F6	**Window/ List only**	Cursor placed in a list or detail window.	Displays the list only.
F7	**Window/ Detail only**	Cursor placed in a list or	Displays the

Shortcut	Equivalent menu command	Context	Result
		detail window.	detail only.
F8	**Window/ List and detail**	Cursor placed in a list or detail window.	Displays both the list and detail.
F4	🔍	Cursor placed in a list or detail window.	Displays the detail of the linked record.
F9		Cursor placed in a list window.	Modifies the width of columns in order to fill the exact width of the window. The space taken up by each individual column remains in proportion with the other columns.
Ctrl + F9		Cursor placed in a list window.	Adjust the width of columns according to the width of the largest item of text contained in the column (for those records loaded in memory).
Ctrl + Page up		In a detail screen.	Places the focus on the tab to the left.
Ctrl + Page down		In a detail screen.	Places the focus on the tab to the right.
Alt + Enter	"Configure object"	On a field or link in a detail screen.	Displays the object configuration screen.
Insert		Cursor placed in a list window.	Creates a new record.
Delete		Cursor placed in a main list	Deletes the

Shortcut	Equivalent menu command	Context	Result
		window.	selected record(s)
+ and -		In a tree-view list.	Unfolds or folds the current branch of the tree.
/ and *		In a tree-view list.	Unfolds or folds all the branches of the tree.
Escape key			
ESC		Cursor placed in a list or detail window.	Closes the window if no modifications have been made. Otherwise offers to save modifications before closing.
ESC	[×]	Cursor placed on a field or a link.	When you modify a field, cancels the change and recovers the previous value. Note: This function is only available when the [×] button is shown to the right of the field being modified and if the **Do not process the ESC key in a field** option has not been selected in the **Tools/ Options**, menu item **General** tab.
Help			

Shortcut	Equivalent menu command	Context	Result
F1	**Help/ Index**	All contexts, except in a script builder window.	Displays the main on-line help of AssetCenter.
F1		In a script builder window.	Displays the AssetCenter Programmer's Reference.
Shift + F1	**Help/ Help on this field**	Cursor placed on a field, link or a tab list in a detail window.	Displays the extended help on a field or a link.
Ctrl + P	**File/ Print**	Cursor placed in a list or detail window.	Displays the print dialog box.
Exiting			
Alt + F4	**File/ Exit**	All contexts.	Exits AssetCenter.
Editing			
Ctrl + A	**Edit/ Select all**	Cursor placed in a list or detail window.	Selects all records (taking any filters and sorts into account).
Ctrl + X	**Edit/ Cut**	Text selected in a field or records selected in a tab list.	Cuts the text or records and places them in the Windows Clipboard.
Ctrl + C	**Edit/ Copy**	Text selected in a field or records selected in a tab list.	Copies the text or records and places them in the Windows Clipboard.
Ctrl + V	**Edit/ Paste**	Text selected in a field or records selected in a tab list.	Paste text or records from the Windows Clipboard.
Ctrl + T	**Window/ Tree view**	Cursor placed in a list or detail window (if the list is also displayed).	Displays the list in tree view.
Ctrl + L	**Window/ Table view**	Cursor placed in a list or	Displays the list

Shortcut	Equivalent menu command	Context	Result
		detail window (if the list is also displayed).	in table view (list view).
Ctrl + ;		Cursor placed in a "date" or "date+time" type field.	Inserts the current date and time of the machine.
Data			
F5	**Window/ Update**	Cursor placed in a list or detail window.	Updates the detail and/or list.
Ctrl + F5	**Tools/ Refresh caches**	All contexts.	Refreshes the caches.
Wizards			
Shift + F9		All contexts.	Launches the wizard debugger.

Chapter 3 - Customizing AssetCenter at the user workstation level

This chapter explains how to customize AssetCenter at the user workstation level.

You will find information on the following topics:

- Activating the modules
- Customizing the toolbar
- Customizing tabs
- General ergonomic options
- Navigation options
- Options concerning lists
- Display options
- Options concerning the messaging system
- Options concerning time zones
- Options concerning refreshing caches

Note: All users can customize AssetCenter at workstation level. These modifications only concern the workstation of the user who made them. Other workstations are not affected.

All the options presented in this chapter are immediately stored after being validated or after closing the window you used to configure them.

Activating the modules

AssetCenter allows you to adapt the user interface to your needs by only selecting those functions that you need to access. This simplifies the user interface.

Use the **File/ Activate modules** *menu item to activate modules individually at the level of each client machine.*

The selection of modules that you make only affects the menu items and tabs available from the given workstation.

Customizing the toolbar

This chapter explains how to customize the AssetCenter toolbar.

You will find information on the following topics:

Introduction

- Definition of the toolbar

Things you can do with the toolbar

- Modifying the contents of the toolbar
- Modifying the position of the toolbar

Use the **Tools/ Customize toolbar** *menu item to configure the toolbar.*
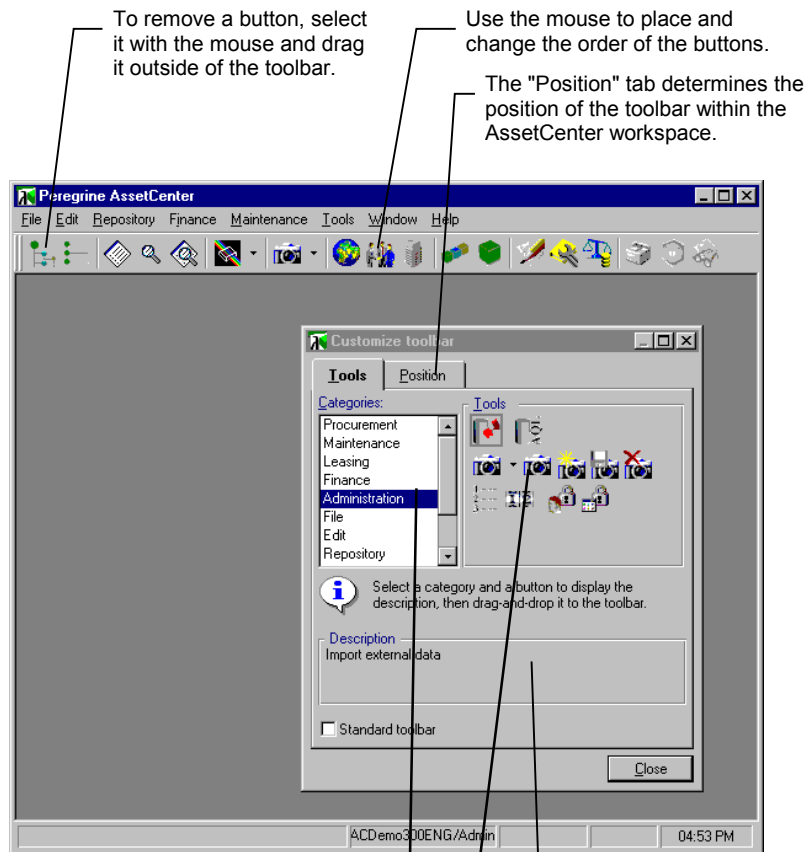
To remove a button, select
it with the mouse and drag
it outside of the toolbar.

Use the mouse to place and
change the order of the buttons.

The "Position" tab determines the
position of the toolbar within the
AssetCenter workspace.

① Select the category of the button you
wish to display.

② Select the button and drag it to the
desired position in the toolbar.

The description of the
button you have select
appears here.

Toolbar configuration screen

Definition of the toolbar

The AssetCenter toolbar contains a selection of icons to let you access
certain program functions directly without using the menu bar.

The toolbar is fully customizable

Modifying the contents of the toolbar

Use the **Tools** tab in the toolbar customization window (**Tools/ Customize toolbar** menu item) to modify the contents of the toolbar.

Adding a button to the toolbar

✤ Select the "Category" of tools containing the icon you want to add. AssetCenter displays all the buttons in that category. The "Description" field describes the selected icon.

✤ Select the desired button and drag it to the desired position in the toolbar. AssetCenter inserts the icon in the toolbar and resizes it if necessary.

Removing a button from the toolbar

Select the button and drag it outside the toolbar. AssetCenter modifies and resizes the toolbar as appropriate.

Repositioning a button in the toolbar

Select the button and drag it to another position in the toolbar. AssetCenter modifies and resizes the toolbar as appropriate.

Adding a separator in the toolbar

Select the button to the right of (or below) the area where you want to add a separator. Then, drag it to its own right half (lower half if the toolbar is in the vertical position.) AssetCenter adds a separator in front of the button and resizes the toolbar if necessary.

It is not possible to have two separators together. You may not place a separator in the first position.

Removing a separator from the toolbar

Select the button immediately preceding the separator and drag it over the separator. AssetCenter deletes the separator and resizes the toolbar if necessary.

Restoring the default toolbar

Check the **Standard toolbar'** option to restore the toolbar.

Remark: If you restore the standard toolbar, any customizations are lost.

Modifying the position of the toolbar

The position of the toolbar in the AssetCenter workspace can be modified using the **Position** tab in the toolbar customization window (**Tools/ Customize toolbar** menu item.)
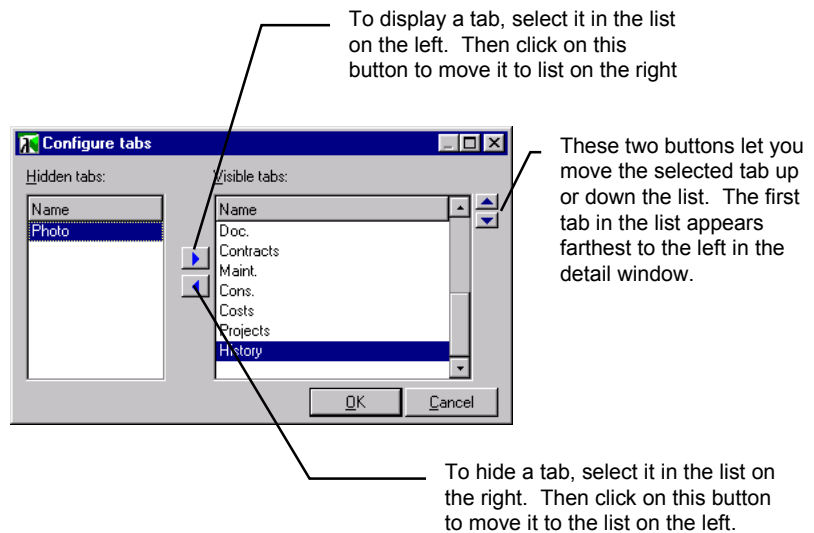
A floating toolbar is a toolbar that you can move freely around the workspace without going through the **Tools/ Customize toolbar** menu.

Customizing tabs

At the level of each AssetCenter user workstation, it is possible to select the tabs to be displayed in a detail window and the order in which they are displayed. Other workstations are not affected by these modifications.

Use the **Tools/ Configure tabs** *menu item once the record detail is displayed to make these modifications*

- To show a hidden tab, select it in the left-hand list, then move it into the right-hand list by clicking the right arrow.
- To hide a visible tab, select it in the list on the right, then move it into the left-hand list by clicking the left arrow.
- You can change the order of items in the right-hand list. Move the lines one by one to the desired position using the mouse, or use the up and down arrows to the right of the list. The tab at the top appears on the left of the detail window.

To display a tab, select it in the list on the left. Then click on this button to move it to list on the right

These two buttons let you move the selected tab up or down the list. The first tab in the list appears farthest to the left in the detail window.

To hide a tab, select it in the list on the right. Then click on this button to move it to the list on the left.

Configuring tabs to be displayed in detail windows.

General ergonomic options

Use the **General** *tab in the* **Tools/ Options** *menu item to select general ergonomic options.*

In this screen, the icons are activated and deactivated by clicking them with the mouse. When an icon is active, it looks like a button that is pressed in; it is also lighter than a button that is deactivated.

Confirmations frame

Select the icons corresponding to the operations for which you want AssetCenter to prompt for confirmation before executing.

Authorize extended deletions field

When you delete a given record X (an asset, for example) linked to records that depend essentially on X (expense lines of the asset, for example), AssetCenter will or will not authorize deleting X, according to

whether the **Authorize extended deletions** option is checked or
unchecked:

> ❖ If the option is unchecked, it will not be possible to delete X.
>
> ❖ If the option is checked, it will be possible to delete X. A
> confirmation window asks the user what should be done with
> linked records.

Text colors frame

Values in fields may have two colors:
- One color if the value has been modified since the record detail
  screen has been displayed (this color may be customized in
  AssetCenter.)
- Another color if it has not been modified (this color is defined in the
  Windows Control Panel.)

Field names may be one of three colors:
- One color if the field is mandatory (this color may be customized in
  AssetCenter.) If you must enter something into a field, AssetCenter
  will not create a record until the field has been populated.
  Important note: When importing data into a database, AssetCenter
  does not take the mandatory nature of fields into account.
- Another color if it is possible to enter text in the field (this color is
  defined in the Windows Control Panel, under Colors/ "text" item.)
- A third color if the field cannot be edited (this color may be
  customized in AssetCenter.) A value may not be edited if your user
  profile doesn't allow it, or if the context makes it impossible.

Navigation options

Use the **Navigation** *tab in the* **Tools/ Options** *menu item in order to
specify navigation options.*

These adjustments may appear complex; we suggest using those modes
pre-defined by AssetCenter.

Two pre-defined modes are available by clicking the corresponding
buttons:

> ❖ [Beginner]
>
> ❖ [Advanced]

Select your type of utilization.

Selection windows

Selection windows option

Displays the ▤ button to the right of the link fields.

The selection window is the window used to select a record in a linked table in order to assign a value to a field.

This is the case when you select a department for an employee, for example.

Drop down lists option

If you click this option, the ▾ button appears to the right of link fields.

This button lets you select a linked record from a simple list.

Trees in drop down lists option

If you click this option, drop down lists will appear in "tree view" when the list has a hierarchic structure.

The **Trees in drop down lists** option only works if you select the **Drop down lists** option.

Case sensitive option

This option is used for the type-ahead function in detail windows.

AssetCenter's behavior concerning this option depends on the DBMS used when database was created.

❖ "Oracle" supports the option and respects uppercase and lowercase.

❖ "SQL Anywhere" does not support the case sensitivity option.

❖ With "Sybase" and "Microsoft SQL Server", case sensitivity depends on the installation options of the DBMS.

When choosing a record, this option determines whether or not AssetCenter differentiates between uppercase and lowercase characters.

For example, if this option is selected A^a, AssetCenter considers "Compaq" and "compaq" to be two different values.

Type-ahead after option

Definition

In order to make it easier to populate fields that may be edited, AssetCenter automatically fills in entries when you are entering data in a table field. To do this, AssetCenter selects the record in the table that is alphabetically the closest to the text you entered.

Example

Let's take the following example: You want to populate the **User** field (SQL name: User) in the **General** tab of the asset detail with the following value: "Nicola Merchant". Furthermore, let's suppose that a person named "Mankowicz, Dominic" exists in the database.

❖ Move to the field and type the letter "M".

❖ AssetCenter automatically populates the field using the first alphabetic value that matches your entry: in this case, "Mankowicz, Dominic".

❖ Note that AssetCenter automatically selects the filled-in text. Now type the letter "e".

❖ AssetCenter populates the field using the closest alphabetic value to "Me".

❖ Now the field is populated as you wanted.

If the text you entered does not correspond to any records in the database, the type-ahead process is interrupted.

In practice, you can disable the type-ahead function by defining a very high value for this option (e.g. 100 seconds).

Parameters for the option

The **Type-ahead after** field contains the latency, in milliseconds, during which AssetCenter will wait before attempting to fill in the text.
You can:

❖ Type directly in this field.

❖ Increase the value of the field by one millisecond by pressing the ▲ button.

❖ Decrease the value of the field by one millisecond by pressing the ▼ button.

Linked windows

Maximum window depth option

The number you enter here is the maximum number of links you can travel when displaying the details of successive linked elements using the button.

This field only accepts values from 1 through 10.

Example: If you choose "1", AssetCenter will let you display the detail of an asset, then the detail of the linked user, but will not let you display the detail of the user's location.

Modal windows option

If you click this option, you cannot return to the detail window from which you displayed either the record's selection window or the detail of a linked record until you close the selection window or the detail of a linked record.

To see the effects of the **Modal windows** option, the "Maximum depth" field must have a high enough value. To see its effect on the selection windows, the **Selection windows** option must be checked.

Here is an example of what happens if you click this option:

- ✥ You display the list of assets and the detail of an asset.
- ✥ You ask for the detail of the asset's user by clicking the button to the right of the **User** (SQL name: User) field. The user detail is displayed.
- ✥ You cannot return to the asset detail window while the detail of the asset's user is still open.

Unique selection windows option

If you check this option, from the record detail you cannot:

- ❖ Display the details of more than one linked record at the same time using the button.
- ❖ Display more than one selection window at a time using the button.

To see the effects of the **Unique selection windows** option, the "Maximum depth" field must have a high enough value. To see its effect on the selection windows, the **Selection windows** option must be checked. If you click the **Modal windows** option, the **Unique selection windows** option becomes active.

Here is an example of what happens if you click this option:

- ✥ You display the list of assets and the detail of an asset.
- ✥ You ask for the detail of the asset's user by clicking the button to the right of the **User** (SQL name: User) field. The user detail is displayed.
- ✥ Without closing the user detail window, return to the asset detail window.
- ✥ You cannot ask for the detail of another linked record (the Location, for example) by clicking the button. To do this, you need to close the detail of the user first.

Close when main record changes option

If you click this option, AssetCenter automatically closes an item's selection and detail windows if they were left open when you change records.

The **Close when main record changes** option only works if you have selected the **Modal windows** option. To see the effects of the **Close when main record changes** option, the "Maximum depth" field must have a sufficiently high value.

Here is an example of what happens if you click this option:

- ✥ You display the list of assets and the detail of an asset.
- ✥ You ask for the detail of the asset's user by clicking the button to the right of the **User** (SQL name: User) field.
- ✥ Without closing the user detail window, return to the asset detail window.
- ✥ Select another asset.
- ✥ If this option is checked, the user detail window in the background is closed automatically.

Displays this button ▤ to the right of link fields.
This button displays the normal list of linked elements for selection.

Displays this button ▾ to the right of link fields.
This button displays a simplified list of linked elements for selection.

If you select this option, popup lists (combo boxes) appear as tree structures.

A selection window is used to select an element in a table linked to the element you are currently editing.
This is the case, for example, when you select the department of an employee. A selection window is displayed by clicking on the ▤ icon.
Similarly, the detail of the linked element can be displayed by clicking on the magnifier 🔍 in the same way.

Rules for selecting linked items

Options concerning lists

*Use the **Lists** tab in the **Tools/ Options** menu item to access the options concerning lists.*

You may define options concerning:
- Main lists in AssetCenter (e.g. the list of assets, etc.)
- Tab lists, i.e. those appearing in detail tabs (list of assets on a contract, for example.)

Initially collapsed option

If you check this option, the branches in tree lists are collapsed by default when you first open the list.

> Note: Concerning the 3 following options: The time required to load records in memory varies considerably. AssetCenter loads records according to the conditions defined in the three following options. The most restrictive condition is the one which is applied. To load more records in memory, there is a button ⊞ to the right of list screens that lets you do this. These records are added to those already in memory.

Show wait message after option

This field fixes the time after which an information box is shown.

This time is expressed in milliseconds and should be between 100 ms and 15 000 ms.

Do not load for longer than option

This field fixes the maximum time AssetCenter should spend loading records in memory.

This is expressed in milliseconds and should be between 1 000 ms and 30 000 ms.

Do not load more than option

This field fixes the maximum number of lines to load in memory for each loading operation.

The number of lines must be between 10 and 100 000.

Alternate color lines option

When you select a color for this field, record lists alternate between white and this color.

This holds true for both tree views and list views.

Confirm modifications by drag and drop option

If you check this option, AssetCenter asks you to confirm all drag and drop operations in tree views (example: dragging and dropping an employee from one department to another.)

This option is only available for main lists.

Display icons option

If you check this box, AssetCenter displays the icons in record lists without the need to select the corresponding field in the list configuration. If this box is not checked, the icons are not displayed.

Display options

Use the **Tools/ Options** *menu item,* **Display** *tab to access the display options.*

Display dictionary item field

The AssetCenter database dictionary contains the list of its components:
- Fields,
- Features,
- Links,
- Keys,
- Etc.

This dictionary is displayed when you have to select one of its components: Editing a query or default value script, importing or exporting, configuring a list, etc.

The **Display dictionary item** field configures the display of information describing the components of the database dictionary.

Tooltips

When the **Show tooltips** option is selected, a tooltip is displayed when the mouse passes over certain areas in the AssetCenter workspace, especially over icons on the toolbar.

News frame

Read on connecting option

If this check box is selected, the list of news items to be displayed on the machine will be refreshed on connection to the database.

Colors

Colors used for marking news items according to their importance (1 = high, 2 = normal, 3 = low.)

The background color is the color of the marquee.

Options concerning the messaging system

Use the Messaging *tab in the* Tools/ Options *menu item to access the options concerning the messaging system.*

Test new messages frame

This box concerns parameters for testing new messages.

At login option

The agent performs the test when the user logs on to the database using their **Login** name.

Regularly every… minutes option

The agent performs the test at the specified frequency.

Options concerning time zones

Use the Time zone *tab in the* Tools/ Options *menu item to access the options concerning time zones.*

This tab appears if you have chosen to implement time zones when creating the database under AssetCenter Database Administrator.

Time zone used for display frame

The options in this frame allow you to specify the time zone used for displaying "Date+Time" fields.

Note: "Date+Time" fields may be stored as a reference to a time zone that is different from the zone used for display.

Choose from among the time zones corresponding to the current time only option

If this check box is selected, AssetCenter filters the list of items in the **Time zone** (SQL name: TimeZone) field and displays only those time zones compatible with the workstation's current time. To do this, AssetCenter compares the server's time to the workstation's time.

Time zone option

This field defines the time zone used for displaying all "Date+Time" fields.

Verify local time compared to that of the server frame

The verification, performed by AssetCenter, consists of comparing the time on the database server with that of the client. The time difference is expressed as [(n * 30minutes) + m] where m is between -15 minutes and + 15 minutes.

The verification is performed on connection to the database and at the defined intervals.

If the time difference exceeds 5 minutes, AssetCenter offers to synchronize the local time on the client.

If you refuse this update (for example, if you think that it is the time of the server that requires changing):

- If you are already connected, you can carry on working.
- If you are in the process of connecting, the connection is refused. You can connect again once the difference between the two times no longer exceeds 5 minutes (following either a modification to the time of the database server and/or of the machine).

Regularly every option

If this check box is cleared, AssetCenter Server does not perform a verification.

Options concerning refreshing caches

Use the Caches tab in the **Tools/ Options** *menu item to access the options for refreshing caches.*

Cache refreshing is only used when the administrator (or a user with the appropriate rights) adds, deletes or modifies records in certain tables:

The caches described here are different from the connection caches in the **Cache** tab of the "Manage connections" screen.

The options in the **Caches** tab allow you to define the caches that will be refreshed when the **Tools/ Refresh caches** command is selected. To do this, check the corresponding box in the "Using Ctrl-F5" column. To automatically refresh certain caches on a periodical basis, check the corresponding box in the **Every** column.

You can define the periodicity with which each cache is updated by double-clicking the value next to the check box.

The [Refresh all] button allows you to update all caches immediately.

Chapter 4 - Searching and filtering records

This chapter explains how to search for and filter records with AssetCenter.

You will find information on the following topics:
- Overview of filters and searches
- Standard filters
- Simple filters
- Query filters
- Specific filter
- Removing a filter

Use the specific menu to access the list of filters.

Overview of filters and searches

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

You can use several filters together.

You can apply filters in "Tree view" and in "List view".

Types of filters available

There are several types of filters:

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

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

- 🔍 Query filter: This filter executes a query. 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 records (features or expense lines, for example.) In some cases AssetCenter suggests filters for a given tab to display a list with a selection of records that meet certain conditions. AssetCenter determines which filters are used.

Superimposing filters

Filters may be applied for different reasons:

- User profile "Access restrictions" for the connected user. These criteria mean that a user will only see the record that corresponds to criteria defined by the query in the user profile. The user doesn't see directly that such a filter has been applied.

- Filters applied in the foreground on lists: These filters are accessed from the specific menu of the displayed list (simple filters, query, standard, specific.) The user sees clearly that such a filter is being applied.

- Filters applied in the background on lists: These filters are those which are accessed from the popup menu in the list (query filter.) The user sees that such a filter is being applied since the 🖼️ icon is colored in.

- Filters automatically applied according to the context. For example, when you display the selection window of servers accessible from a computer, only shared assets are displayed. The user doesn't see explicitly that such a filter is being applied, but it is naturally linked to the display context.

When you display a list, all the potential filters are applied simultaneously (this is equivalent to the SQL "AND" clause.)

Applying filters to a list

You have two possibilities when filtering records.

- You can apply one or more filters in the foreground. The detail of these filters can be seen in the window displaying the list.

- Or you can apply a query filter in the background. The detail of this filter is not shown in the window displaying the list, but the indicates the presence of the filter.

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

First possibility (one or more filters in the foreground)

This option is only applicable to main lists and not to lists in tabs.

| Steps	Example for the departments and employees table
Display the list you want to filter.	**Repository/ Departments and employees** menu item.
A specific menu for this list is displayed to the right of the **Edit** menu.	**Employees** menu.
Select a first filter. The filter appears in the top left corner of the list displayed.	**Employees/ Simple filter** menu item. This filter is identified by the icon.
Select a second filter. The filter is displayed beneath the first.	**Employees/ And/ Query filter**. This filter is identified by .
Launch the filtering	Click one of the buttons in the filter zone.
The result is displayed in the list of records of the list.	

Second possibility (a single "Query" filter in the "background")

This option is applicable to both main lists and lists in tabs.

- ✍ Display the list to filter.
- ✍ With a right click of the mouse, display the popup menu.
- ✍ With a left click of the mouse, select **Configure list**.
- ✍ Activate the **Filter (WHERE clause)** tab.
- ✍ Define you filter criteria.

➔ Click [OK].

➔ The 🎨 is in color to remind you that a filter is applied in the background.
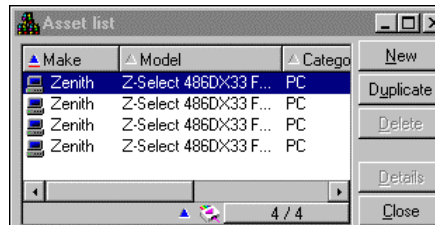
The 🎨 becomes colored 🎨 if a filter is applied in the "background" (filters defined using the "Configure list" pop-up menu item).

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

Using filters in the background

Rules for the operation of filters

- Applying a filter does not affect the choice of columns to be displayed in the list.
- A filter may be saved directly for later use. However, it can be saved within a view.
- In certain cases, to apply a filter (or filters), you need to press on one of the 🔘 icons that appear in the filter zones.
  If no such icon appears, the filter is applied automatically.
  If the icon appears in gray 🔘, the filtering has been carried out. This appears as normal if you modify or add a filter condition; you need to click it again to apply the filters properly.
- To update the filtering and take into account changes in the database, press F5 or use the **Window/ Update** command.
- When you apply several filters simultaneously, AssetCenter applies an "AND" condition (not "OR".) If a record is to be displayed while a filter is applied, it must satisfy all the conditions defined by the filters.

Filters and lists in tree view

Certain tables are hierarchic and they allow you to display records in a tree structure of components and sub-components. AssetCenter normally only displays those records that satisfy filter criteria.

The sub-components of other components are displayed with the whole of their parent components; they are displayed normally if they satisfy the filter conditions and in gray if they do not.

Note: In certain cases, particularly in tables with many records, the search may take a long time.

AssetCenter uses query optimization technology to bring you the results as fast as possible. If an optimization is possible, the results are displayed almost immediately, even if the database is very large.

In other cases, the speed with which results are displayed depends on the database engine used, the speed of the network and the size of the database.

Standard filters

This is a preconfigured filter.

In the list of employees and departments for example, AssetCenter provides a filter to display employees only, departments only, or both at once (**Departments or employees filter**).

Simple filters

Simple filters use a single selection condition.

This condition concerns three types of information:

Types of information	Example taken from employees table
A field in the table.	**First** (SQL name: FirstName) (name) field of the employee.
A field in a linked table. Several levels of links can be used. A search value is entered.	**Name** (SQL name: Name) field in the locations table.
A link. Several levels of links can be used. You just need to choose one or more records in the linked table.	**Location** (SQL name: Location) link

To use a simple filter:

 ✎ Display the list of records to filter.

 ✎ Select the **Simple filter** command from the specific menu of the list (situated to the right of the **Edit** menu): AssetCenter displays the simple filter in the top left corner of the list.

 ✎ Select a field, a link or a field in a linked table in the drop down list. This is sorted by ascending (alphabetical) order.

 ✎ If you have selected a field in the table or a linked table, select a comparison operator. The operators available are:

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

SQL Anywhere is not able to process "LIKE X" clauses when X contains more than 128 characters. This may be the case for **Full name** (SQL name: FullName) fields and comments. If X is larger than 128 characters, the filter application displays an ODBC error message.

↳ Enter a value.

↳ If you have selected a link, select one or more records directly from the linked table (use Ctrl for multiple selections. You can also select a range of records by holding down SHIFT and clicking the first and last record.

↳ If the linked table is a hierarchic table, and you have selected the **Trees in drop down lists** option (**Tools/ Options** menu, **Navigation** tab), you may select the **Sub components** box (or **Sub departments**..etc…) if you want sub-components to be included in the selection (OR clause.)

↳ Click 🗒 to launch the filtering function.

↳ AssetCenter searches the corresponding records and displays them directly in the list.

Click No filter in the specific menu to remove the filter.

Query filters

This filter is based on a query you have created previously.

The query starts from a main table and allows you to combine several selection criteria, based on information from the list itself or information from linked tables.

The following sections detail the different ways in which you can apply a query filter to a list.

Using the specific menu

This method is available for main lists only. It cannot be applied to tab lists.

- ↳ Display the list screen.
- ↳ Use the **Query filter** command in the specific menu to call up the filter.
- ↳ In the top left of the screen, there appears a zone allowing you to select from existing queries, or define a new query as needed.
- ↳ If you select an existing query from the list, AssetCenter displays the corresponding AQL code.
- ↳ Otherwise, you may directly enter the text of your query, or click the magnifier 🔍 to access the query builder screen. Click ⟨ OK ⟩ when you have finished composing your query.
- ↳ Click 👁 to launch the filtering function.

From the popup menu

There are two methods for defining a query filter from the popup menu.
- The first only applies to main lists: Proceed as described in the section entitled "Using the specific menu", but display the filter via the **Query filter** command in the popup menu (right click with the mouse).

- The second method applies to both main lists and list appearing in tabs:
  - ↳ Display the list screen.
  - ↳ Right-click to display the popup list.
  - ↳ Use the **Configure list** menu item.

↳ Go into the **Filter (WHERE clause)** tab: You access the query builder screen.

↳ Define you filter criteria.

↳ Click [OK] to apply the filter

To apply a query filter on a list in a tab, display the popup menu (right mouse button) and use the Configure list menu item, Filter (WHERE clause) tab. To remove the filter, click [×].

To remove a filter in the "foreground", in the popup menu, click No filter.

Query builder screen

The query builder screen can be accessed using one of the following methods:

- by clicking the magnifier 🔍 in the writing zone of a query filter.
- by using the **Configure list** popup menu item, **Filter (WHERE clause)** tab.

This screen functions according to the same principles as the general query editor, but without the table, author or sharing options and without the preview tab. It is only possible to create queries on the table to which the filter is applied.
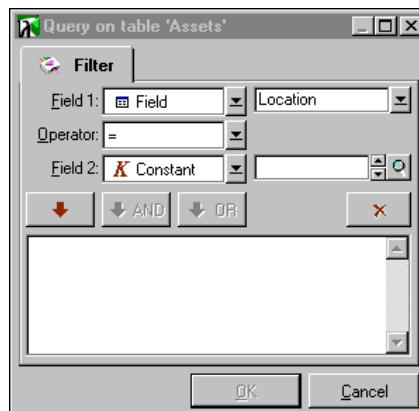
Once the query is finalized, click [OK]. It is only possible to save one query created in this way.

Note: In certain cases, particularly in tables with many records, the search may take a long time.

> AssetCenter uses query optimization technology to bring you the results as fast as possible. If an optimization is possible, the results are displayed almost immediately, even if the database is very large.
>
> In other cases, the speed with which results are displayed depends on the database engine used, the speed of the network and the size of the database.

Specific filter

Certain tabs in the detail windows display a list of records (contracts, expense lines, for example). In some cases AssetCenter will offer a list of filters on the tab to display a record selection according to certain criteria. AssetCenter determines which filters are used.
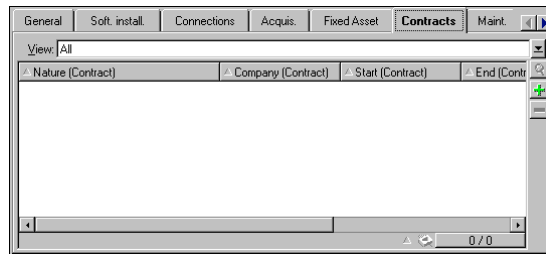
*Specific filter in the **Contracts** tab of an asset detail*

Removing a filter

Removing all applied filters

To remove all applied filters, use the **No filter** option in the popup menu or specific menu of the list being displayed.

Removing one of the applied filters

When several filters are applied to a list, you can remove one of them by proceeding as follows:

- ✎ Place the mouse on the filter to deactivate.
- ✎ Right-click to display the popup menu.
- ✎ Select **Remove this filter**.

Removing a filter applied in the background

To remove a query filter applied in the background, display the popup menu (right-click with the mouse) and select **Configure list**, **Filter (WHERE clause)** tab. Click the ⬚ button.

Chapter 5 - Printing data

This chapter explains how to print data with AssetCenter.

You will find information on the following topics:

- Overview of printing data
- General information requested when printing
- Printing a list of records
- Printing detailed information

Use the **File/ Print** *menu item or the "Ctrl+P" keyboard shortcut to print.*

- In the "Type" field, select the type of AssetCenter form or Seagate Crystal report that you want to print.
- In the "Form" field, select the required form or report. AssetCenter only shows forms or reports corresponding to the selected type.
- Click the button to start printing.

Overview of printing data

AssetCenter allows you to print:

- lists (any applied filters are taken into account).
- record details.

You have the choice of two models in defining the layout of printed information:
- AssetCenter forms. Use the **File/ Forms** menu item to access the table of forms. This permits you to create, modify or delete forms.

- Crystal Reports reports. Use the **File/ Reports** menu item to access the table of reports. AssetCenter is supplied with several canned reports. In order to create new ones you need to use Crystal Reports.

> Note: Reports generated under Crystal Reports provide greater flexibility and options for configuration than the AssetCenter's internal forms.

General information requested when printing

When you select **File/ Print** (keyboard shortcut: CTRL+P), AssetCenter asks you for the following information:

Type (of form)

Four types of forms are available for printing under AssetCenter:
- AssetCenter forms:
  - ❖ Detail forms: to print detail information on selected records in a list.
  - ❖ List forms: to print the contents of lists.
- Crystal Reports details:
  - ❖ Detail reports.
  - ❖ Non contextual reports.

Form

Once you have chosen the form **Type**, select the form itself.

If the **Type** is "Detail form (internal)" or "List form (internal)", AssetCenter shows just those forms for which:
- the **Type** corresponds to the selected **Type**.
- the **Table** (SQL name: TableName) field (form detail) corresponds to the current list.

If the **Type** is **Detail report (Crystal Reports)**, AssetCenter shows just those Crystal Reports reports for which the **Table** field (SQL name: TableName) (report detail) corresponds to the current list.

If the **Type** is **Non-contextual report (Crystal Reports)**, AssetCenter shows just those Crystal Reports reports for which the **Table** field (report detail) is empty.
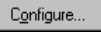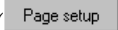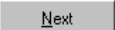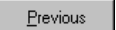
Printing data

To print the data, click the [🖨 Print] button.
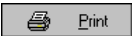
Print preview

For a print preview, click [🔍 Preview].

The print preview window lets you:

- Change the target printer ([Configure...] button)
- Change the margins and zoom factor of your form ([Page setup] button)
- Print your data ([Print] button)
- Display the other pages of the form ([Next] and [Previous] buttons)

Printing a list of records

To print a list of records:

- ↳ Display the usual list screen.
- ↳ Select the **File/ Print** menu item or use the keyboard shortcut: CTRL+P.
- ↳ Populate the dialog box.
- ↳ You can preview the pages by clicking [🔍 Preview].
- ↳ Click [🖨 Print].

If you have applied a filter to the list, only the filtered records will be printed. AssetCenter prints the columns you have chosen to display on the screen.

Printing detailed information

To print the information belonging to a record detail:

 ↳ Select the record to be printed in a list.

 ↳ Launch the **File/ Print** menu item or use the keyboard shortcut: CTRL+P.

 ↳ Populate the dialog box. Select a **Detail form (internal)** or a **Detail report (Crystal Reports)**.

 ↳ Click ⟨Preview⟩ for a print preview (optional).

 ↳ Click ⟨Print⟩.

AssetCenter uses both AssetCenter internal "forms" and Crystal Reports to lay out printed pages.

If the chosen printing **Type** is **Detail form (internal)**, AssetCenter is capable of printing several records at a time. You just need to select those records to be printed together and select the **File/ Print** menu item.

This is not possible in the case of a **Detail report (Crystal Reports)**. To accomplish this, you must repeat the procedure described above for each record.

When you select several records and set the **Type** field (SQL name: Type) to "Detail", you are invited to select options from the lower part of the window:

Page break between records

Starts each new record on a separate page.

Continuous printing

Prints records one after another. Page breaks are not inserted between records.

Labels

Prints record details as labels spread out over the page.

This option is only available if you have selected several records at once.

Vertical separation

Spacing, in millimeters, between two lines of labels.

Horizontal separation

Spacing, in millimeters, between two columns of labels.

Chapter 6 - Executing actions

This chapter explains how to execute actions with AssetCenter.

You will find information on the following points:
- Definition of an action
- Executing an action

Use the **Tools/ Actions/ Edit** *menu item to define actions.*

To execute actions, use the **Tools/ Actions** *menu item or the contextual list of actions from the toolbar.*

Definition of an action

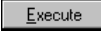An action is an operation that calls on an external program.

There are several types of actions:
- **Executable**,
- **DDE**,
- **Messaging**,
- **Script**: modifying an object in the AssetCenter database,
- **Wizard**,
- **Printing**.

Actions must first be defined before they can be executed by selection from a list.

Executing an action

You may execute an action in one of several ways:

- Using the popup list in the toolbar:
  - ❖ The button is replaced by the icon associated with the last action used on this workstation, if such an icon exists. If an action has already been executed, click the icon, or the icon replacing it to repeat the action.
  - ❖ The button displays the list of available actions.
  - ❖ To insert this popup list in the toolbar, use the **Tools/ Customize toolbar** menu item: it is part of the "Tools" category.
- Using the **Tools/ Actions** menu item: Click the desired action in the sub-menu.
- From the button in the top right corner of the detail of the action:
  - ❖ If the action is contextual, specify the **Context** (SQL name: ContextTable) by selecting a record in the action's reference table.
  - ❖ Click to execute the action.
- From the popup menu (accessible by clicking with the right button of the mouse). If at least one action is available for the open table, the **Actions** entry is shown in the popup menu.

Multiple-selection in lists

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

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

"Wizard" type actions

Wizards are composed of a succession of pages. Each of these pages displays information or requires user input, such as a selection to be made or data items to be entered.

Navigating between the different pages of a wizard is simple:

- Once the page is populated appropriately, you can move to the following page (determined by a transition) by clicking the ⬚Next > button. This button is not available for 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 designated 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.

Chapter 7 - Consulting messages in AssetCenter

This section explains how to configure the checking of new messages and how to consult messages.

You will find information on the following topics:
- Consulting messages received
- Incoming message notification

*Use the **Tools/ Messages** menu item to access messages addressed to you.*

*Use the **Tools/ Options** menu item, Messaging tab to configure the verification of new incoming messages.*

Consulting messages received

*You can access messages addressed to you via the **Tools/ Messages** menu item or via the dialog box indicating the presence of new or unread messages.*

Referenced object

This button allows 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, clicking this lets you directly access the detail of this purchase request.

Incoming message notification

An agent is executed at the frequency defined in the **Tools/ Options** menu item, **Messaging** tab.

On connection to the database, an agent checks for unread messages. If any are found, the agent displays the following message:
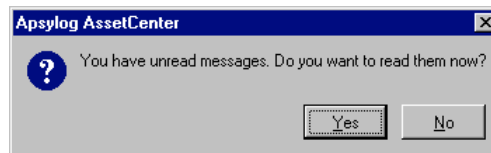
Message displayed if there are messages unread on opening the database

Thereafter, the agents checks for the arrival of new messages at the frequency defined in the options. If new messages have been received since the last time the agent ran a test, the following message is displayed:
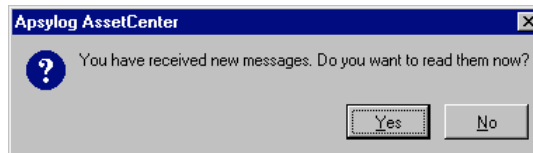
Message displayed if new messages have been received

Chapter 8 - Using views

This chapter explains how to use views with AssetCenter.

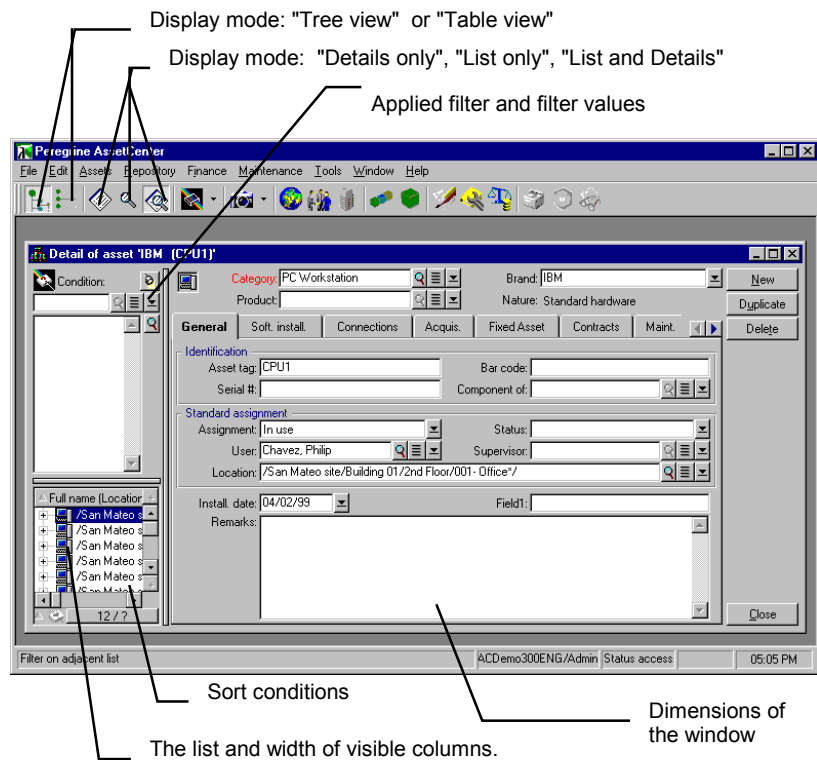You will find information on the following topics:

Introduction

- Definition of a view

Things you can do with views

- Creating views
- Displaying views
- Dropping views
- Modifying views
- Managing views (administrator function)

Use the Tools/ Views menu item to access the list of views.

Display mode: "Tree view" or "Table view"

Display mode: "Details only", "List only", "List and Details"

Applied filter and filter values

Sort conditions

Dimensions of the window

The list and width of visible columns.

Items stored in a view

Definition of a view

A view lets you save list customizations that you make, such as:

- The display mode: **Table view** or **Tree view**.
- Display mode: **Details only**, **List only**, or **List + Details**.
- Sort conditions.
- Filter applied, and the filter values.
- List of visible columns and their width.
- Dimensions of the window.

Views provide an easy way to create reports that must be produced regularly. Once you have displayed the view you can easily print it with the same presentation each time.

Examples of views:
- List of unassigned assets worth over $2,000, presented in a tree view.
- List of all offices with a fax machine, displaying the office number, the fax model and the user name.

Creating views

To create a view, display the list in the conditions you want to memorize and save this presentation using the **Tools/ View/ Create view from current window** menu item.

Any user of AssetCenter with access to the table of views can create a view. The view's author decides whether the view should be accessible to other users. An AssetCenter administrator may display, modify and delete views made by all users, including the ones users decide not to make public.

Displaying views

Use the **Tools/ Views** *menu item to display a view.*

Then select the view you want to display.

The views available are those you have created and those made public by their authors, as long as the **Visible in the menu** option (SQL name: bVisible) has been checked.

The view is displayed using all the saved parameters.

When you select the **Tools/ Views** menu item, AssetCenter displays a new window, even if a list with the same information is already displayed. The window title displays the name of the view.

You should not consider the view as a set of conditions applied to a given list being displayed, but as a list window with a set of display conditions.

You can also use the button in the toolbar to display the list of views. This button displays the icon of the view that was last called.

Dropping views

There are two methods available for dropping (deleting) a view.

1st method

- Display the view.
- Then delete it using the **Tools/ View/ Drop current view** menu item.

2nd method

- Select the **Tools/ View/ Edit** menu item to display the table of views.
- Select the view you want to drop.
- Click .

Modifying views

To modify a view, first display it on the screen.

Modify it, then save your modifications using the **Tools/ View/ Modify current view** *menu item.*

Managing views (administrator function)

Using the **Tools/ View/ Edit** menu item, the administrator can access the list of all existing views. From here it is possible to drop views and by displaying the view details it is possible to:
- See a description of the view.

- Decide whether or not the view should be shared.
- Modify the view's icon.
- Make the view accessible (visible) in the menu.

Chapter 9 - Departments and employees

This chapter explains how to describe and manage departments and employees with AssetCenter.

You will find information on the following topics:

Introduction

- Definition of departments and employees
- AssetCenter user
- AssetCenter administrators
- Creating departments and employees

Information on departments and employees

- Employee training
- Defining an employee's user profile
- Employee groups

Things you can do with departments and employees

- How to organize the departments and employees directory
- What to do when employees change location
- What to do when an employee changes department

Use the **Repository/ Departments and employees** *menu item to access the list of departments and employees.*

Definition of departments and employees

AssetCenter organizes departments and employees in a hierarchy.

Departments and employees are created and managed from the same screen.

Departments and employees are used in several places in AssetCenter:

- User or supervisor of an asset
- Author of an asset view
- Supervisor of a stock
- Supervisor of a project
- Requester or technician for a work order
- Supervisor of a budget
- Supervisor of a contract
- Etc.

AssetCenter user

You must be an AssetCenter "user" in order to be able to connect to an AssetCenter database. This helps improve database security.

Several users may open the database simultaneously and work at the same time.

An AssetCenter "user" is a record in the list of departments and employees which has been assigned a **Login** (SQL name: UserLogin) and a **Password** (SQL name: LoginPassword) by the administrator.

A user is assigned a user profile, unless the user has received administrative rights.

AssetCenter administrators

An AssetCenter administrator is an AssetCenter user who has rights to all tables in the AssetCenter database.

Several users may be database administrators. To create a database adminstrator, another administrator simply assigns administrator rights to that user via that individual's **Profile** tab.

The "Admin" login

There is a default administrator **Login** called "Admin" in the table of departments and employees. For security reasons, this record cannot be deleted.

- When AssetCenter is first installed, this is the only login name that allows you to access the AssetCenter database for all administrative operations.

- You should use this login when you cannot connect under a **Login** name that has administrative rights.

- The access type for the "Admin" **Login** is "Named". This license is not decremented from the number of authorized named users.

Note: The "Admin" login is the only administration login that can be used to delete connection slots using the ⎡ Delete ⎤ button in the connection slot management screen (**Tools/ Administration/ Connection slots** menu item).

Creating departments and employees

Use the **Repository/ Departments and employees** *menu item to display the list of departments and employees.*

This list is organized as a hierarchy. A department may include sub-departments and employees. No sub-records may be created for employees.

Click the ⎡ New ⎤ button in the "Departments and employees" list to create a department or an employee. A window asks you if you want to create a department or an employee. The detail windows for departments and for employees include some differences concerning the basic information and the tabs available. Only employee detail include the **Training**, **Profile** and **Photo** tabs.

Employee training

The **Training** tab displays the list of training programs the employee has followed:

- Use the ➕ and ➖ buttons to the right of the list to add or delete training programs.
- You may display or modify a training program in the list by clicking the 🔍 button.

In the same way as for assets, training items each have a unique bar-code label. By default, this label is defined by a script which uses an AssetCenter counter. You can customize this script to adapt the bar-code label to your needs.

Defining an employee's user profile

To assign a user profile to an employee and to specify a password, display the **Profile** tab in that employee's details.

Warning: Only administrators can see the **Profile** tab in an employee's details.

Defining an administrator

To indicate that a person is an administrator for the database:

- Populate the **Login type** (SQL name: seLoginClass), **Login** (SQL name: UserLogin) and **Password** (SQL name: LoginPassword) fields.
- Check the **Administration rights** (SQL name: bAdminRight) field. This is equivalent to assigning that person all access rights to the database.
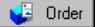
Defining a non-administrator user

To define a user who does not have database administrative rights:

- Populate the **Login type** (SQL name: seLoginClass), **Login** (SQL name: UserLogin) and **Password** (SQL name: LoginPassword) fields.
- Assign a user profile to the employee by populating the **Profile** (SQL name: Profile).
- Optionally select the check boxes in the "Rights specific to the Procurement module" frame.

The person can then access the AssetCenter database using their "Login" name and view/modify the information according to their profile.

Rights specific to the Procurement module

To create an estimate or an order from a purchase request, simply click [Estimate] or [Order] in the request detail window.

By default, Procurement Management does not allow you to create an order or an estimate from an unapproved purchase request. (Purchase requests are not approved until the Approval status field (SQL name: seApprStatus) in the Approval tab in the request details is set to "Approved").

The **Rights specific to the Procurement module** frame allows you to circumvent these rules.

Employee groups

Use the **Repository/ Groups** *menu item to create employee groups*

Employee groups are used in several areas of the software.

For example:

- They can be the assignees of **Internal maintenance Type** (SQL name: seType) work orders.
- They can be the assignees of workflow tasks.

Employee groups are stored in the table of employee groups (SQL name: "amEmplGroup"). This table is hierarchical.

To create an employee group:

✑ Select the **Repository/ Groups** menu item.

✑ Click ⌐New⌐.

✑ Specify a group supervisor.

✑ Specify the members of the group in the **Composition** tab.

✑ Enter any locations dealt with by the group in the **Locations** tab.

✑ Enter any contracts dealt with by the group in the **Contracts** tab.

In the same way as for assets, employee groups each have a unique bar-code label. By default, this label is defined by a script which uses an AssetCenter counter. You can customize this script to adapt the bar-code label to your needs.

How to organize the "departments and employees" directory

Remember that the table of departments and employees is a hierarchic table. Departments can have sub-items (departments or employees), but employees cannot have any sub-items.

The best way to organize this table is to create a hierarchy of the departments in your company and to attach the employees to their respective departments. Employees are therefore at the end of the branches.

What to do when employees change location

✑ Display the list of locations (**Repository/ Locations** menu item).

✑ Create the new locations.

✑ Display the list of departments and employees (**Repository/ Departments and employees** menu item).

✑ Multiple select all the employees who will move to a new location.

✑ In the **General** tab of the employee detail, select the new location.

✑ Click the ⌐Modify⌐ button.

✑ Display the assets list (**Repository/ Assets** menu item).

- Select all the assets moving to the same location.
- In the **General** tab of the asset detail, select the new location.
- Click the [Modify] button.

The other solution, more complex but more powerful, involves exporting the records and modifying them with another AssetCenter program, then importing the modified records.

What to do when an employee changes department

- Display the list of departments and employees.
- Display the details of the employee who is changing departments.
- In the **Department** (SQL name: Parent) field, select the employee's new department.
- If necessary, modify the **Location** (SQL name: Location), **Telephone** (SQL name: Phone), **Fax** (SQL name: Fax), **EMail** (SQL name: EMail) and **Cost center** (SQL name: CostCenter) fields in the **General** tab.
- If necessary, modify the **Location** (SQL name: Location)' and **Supervisor** (SQL name: Supervisor) fields in the **General** tab and the **Budget** (SQL name: Budget) and **Cost center** (SQL name: CostCenter) fields in the **Acquis.** tab of the asset detail of assets used by the employee. In order to do this:
  - display one by one each asset detail from the **Assets used** tab of the employee detail, and modify the fields accordingly.
  - or display the list of assets and apply a filter on the **Order** (SQL name: POrders)**User** (SQL name: User) link by selecting the name of the user concerned. Multiple-select the user's assets and you may now simultaneously modify the fields for the assets.

Chapter 10 - Locations

This chapter explains how to describe locations with AssetCenter.

You will find information on the following topics:

Introduction

- Definition of a location

Information on locations

- Location floor plans
- Assets used at locations
- Taxes associated with a location

Use the **Repository/ Locations** *menu item to display the list of locations.*

Definition of a location

Locations are used to describe the physical location of an asset or a stock, the site of a work order, etc. For example, location descriptions may include graphical floor plans where you position icons representing the employees.

Your company's locations are described in a separate table.

Locations are organized in a hierarchy.

Location floor plans

The **Plan** tab lets you select a floor plan from the list of plans. The "floor plans" stored here may cover a wide range of images: drawings, maps, charts, blueprints, diagrams, etc.

Assets used at locations

All the assets situated at a location may be displayed from the list in the **Assets** tab in the location detail.

Use the ➕ and ➖ buttons to the right of the list to add or delete assets from the list. You may display or modify assets in the list by clicking the 🔍 button.

When you add an asset to a location, it is automatically removed from its previous location. If you detach an asset from a location, the asset is no longer linked to a location. Its user is not modified.

Taxes associated with a location

Tax jurisdictions can be used to associate taxes with locations. To associate a tax jurisdiction with a location, you just need to populate the **Jurisdiction** link (SQL name: TaxJuris) in the **General** tab of the location detail screen.

Chapter 11 - Suppliers

This chapter explains how to describe and manage suppliers with AssetCenter.

You will find information on the following topics:

Introduction

- Definition of a supplier

Information on suppliers

- Supplier contacts
- Contracts signed with suppliers
- Products provided by suppliers

Use the **Repository/ Suppliers** *menu item to display the supplier list.*

Definition of a supplier

AssetCenter lets you describe third party suppliers/companies and their contacts in a specific table.

Suppliers appear in the database as parties involved in a contract, maintenance providers, suppliers, etc.

Suppliers in AssetCenter should not be confused with companies or subsidiaries of your own organization.

Supplier contacts

The **Contacts** tab of the supplier detail contains a list of contacts at the supplier.

To add, duplicate or delete a contact, right-click within the subtab and select **Add linked record**, **Duplicate linked record** or **Delete link** from the popup menu.

The full list of contacts is only available via the **Tools/ List of screens** *menu item.*

Contracts signed with suppliers

The **Contracts** tab in the supplier detail displays the list of contracts signed with the supplier.

Use the and buttons to the right of the list to add or delete contracts.

You can display or modify a contract in the list by clicking the button.

Products provided by suppliers

The **Products** tab in the supplier detail displays the list of conditions of acquisition (purchase terms) for products from this supplier.

- Use the and buttons to the right of the list to add and remove purchase terrms
- View or modify an existing purchase term by clicking the magnifier .

Updating the suppliers of a product or the offering of a supplier

You can update the suppliers of a product from the product detail or from the supplier detail according to whether you want to:

- Update the products of a supplier. Start from the **Products** tab of a supplier detail.

- Update the supplier(s) of a product. Start from the **Suppliers** tab of product detail.

Chapter 12 - Floor-plans

This chapter explains how to describe floor plans with AssetCenter.

You will find information on the following topics:

Introduction

- Definition of a floor-plan

Information on floor plans

- Defining a floor plan

Thing you can do with floor- plans

- How to view objects from a floor plan
- How to optimize the use of floor plans

Use the **Repository/ Floorplans** *menu item to display the list of floor plans.*

Definition of a floor-plan

A floor plan is a graphical area in which you can place records from tables. (All tables can be used, in particular locations, employees and assets). Once the records from tables are in position, it is very easy to access these records from the floor plan: just double-click the item itself.

Defining a floor plan

To define a floor plan, use the popup (context-sensitive) menu displayed when you right-click the floor plan area. The popup menu is very important for floor plans, because the main menu bar does not include the functions used for designing floor plans.
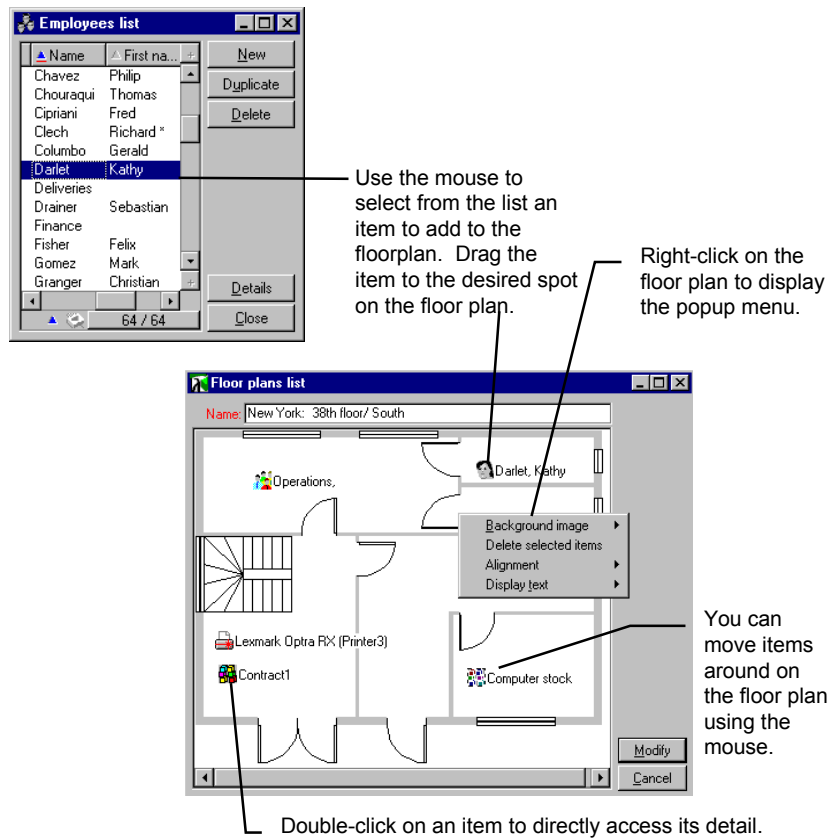
Floor-plan detail

Background image

- **Paste** lets you paste an image.
- **Import** lets you import an image as a file.
- **Delete** lets you delete the background image.

- **Resize** lets you resize the background image. Drag the handles of the image with the mouse to re-size the image.

Alignment

Lets you align several records in the floor plan. You can select items by holding down SHIFT or CTRL and clicking them, or by drawing a frame around them with the mouse (To select several items inside a frame, click the left mouse button on one corner, then drag the mouse down to the other corner.)

Display text

Lets you position text describing the floor plan item relative to its icon.

Add objects to the plan

Add records from other lists by dragging and dropping the records.

You may do this by selecting records in lists or by selecting the icons in the record detail windows if they exist.

AssetCenter adds the object's icon and text to the floor plan.

Move the records around the floor plan using the mouse.

How to view objects from a floor plan

Double-click an object in a floor plan to access its record detail and view, or to modify the information contained within.

How to optimize the use of floor plans

Floor plans can be created within floor plans in order to create more detailed floor plans.

For example, to create a tree structure of locations such as "State/ Site/ Building/ Floor/ Office":

- ✎ Create a plan for each location: country, site, building, floor and office.
- ✎ Associate each location with the corresponding floor plan: First display the list of locations using the (**Repository/ Locations** menu item. For each location, display the **Plan** tab and select the floor plan corresponding to the location.
- ✎ Position the site plans on the country plan: First display two lists of floor plans (do not let them overlap!) In the first floor plan list, display the details of the country plan. Use the second list to drag and drop the sites onto the country plan.
- ✎ Use the same technique to position the building plans on the site plans, the floor plans on the building plans and the office plans on the floor plans.
- ✎ Finally, position the users and the assets on the office plans: Display the list of floor plans, employees and assets. Then drag and drop the employees and the assets on the office floor plans details.

Note: Create floor plan backgrounds as images that you can then insert in the floor plan details.

Then:
- You may display a floor plan from the floor plan list (the **Repository/ Floorplans** menu item) or from the **Plan** tab in a location detail.
- From a floor plan you can display a sub-plan by double-clicking its representation in the main floor plan.
- Simply double-click the assets and users positioned on the office floor plans to view their details directly.

Chapter 13 - Using features

This section explains how to use features with AssetCenter. You will find the information on the following topics:

Introduction

- Definition of features
- Creating features
- Consolidated features
- Defining the parameters of a feature

Managing features

- Managing feature classes
- Managing features

Properties of features

- Inherited features
- Populating features by selecting a record from another table

Use the **Tools/ Administration/ Features** *menu item to display the screen for creating and editing features.*

Definition of features

Features allow you to complete the description of AssetCenter objects (assets, products, orders, categories, etc.). They are attached to objects with a value and are displayed directly in the object's **Features** tab.

You can create as many features as you wish, and specify their entry mode (**Numerical**, **Text**, etc.). This makes AssetCenter very flexible and allows for extensive customization.

By using features, you can include additional information in areas of particular importance to you (financial, technical, or any other specific area).

Features provide additional "fields" for describing the records in your database. For example, you can fill in the type of processor or the clock speed for a computer, or the horsepower of an automobile.

Finally, features can be queried using the AssetCenter query language.

Creating features

Creating a feature involves identifying it and determining how it behaves.

Identifying a feature

The upper part of the feature detail screen is used to identify and classify the feature (using feature classes). A feature is uniquely identified by its SQL name. The other fields in this part of the screen provide extra information on the feature and are described in detail in the extended help (press SHIFT+F1 to access the extended help on a field).

Behavior of a feature

The behavior of a feature depends on several conditions:
- Its input type, which determines the type of control used in the user-interface to populate the value of the feature for a record. The input type is associated with a unit.

  The "Link" input type, which is complex, is the subject of a separate chapter in this manual.

- Or how it is calculated by consolidation.
- Its parameters.

Consolidated features

The information provided in the "Consolidation" tab in the detail of a featue is used when consolidating a feature. This tab concerns the features for which you want to calculate the value by consolidating the values of other features.

This is possible for features whose **Input type** field (SQL name: seDataType) in the **Input** tab is set to **Numerical** or **Duration**.

If you check the **Calculated by consolidation** box (SQL name: bCalculated), the value of the feature that you create is calculated by adding the values of other features. The features to be taken into account appear in the list in this tab. The calculation is performed as soon as you click the [Create] or [Modify] button.

Use the [+], [−] and [🔍] buttons to add, delete, view or modify features to be included in the consolidation.

The features that you add:

- Must have the same input type (format) and unit as the consolidated feature,
- May not themselves be calculated by consolidation.

When an included feature is modified the consolidated value is automatically recalculated.

In the consolidation calculation:
- Only those features effectively added to records are taken into account.
- All child records are included if the table is hierarchic, as shown in the following example:
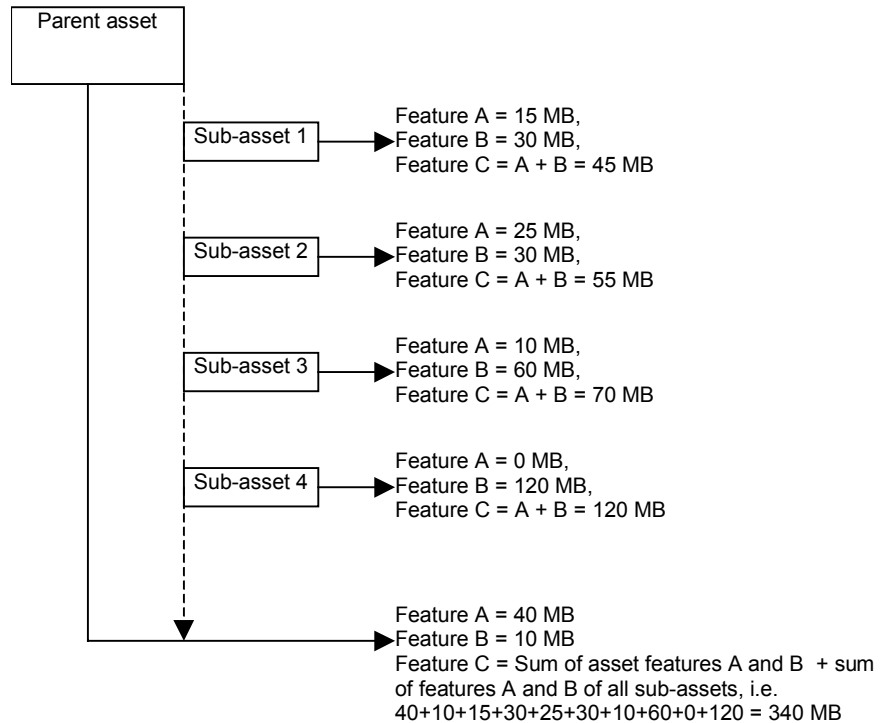
Consolidated features and hierarchic tables

Modifying the list of features making up a consolidated feature can draw heavily on the resources of the database server. In effect, the software recalculates the value of the feature for all the records that contain it.

Defining the parameters of a feature

The parameters of a feature can be found in the **Parameters** *tab of the detail of the feature.*

Once you have created a feature, the parameters are used to specify:

- The names of the tables that can use this feature.

- The default value for the feature.

- Any data entry and display constraints concerning this feature.

Editing the parameters of a feature

If you click the ✚ or 🔍 buttons, AssetCenter opens the screen for editing and creating parameters.

> The screen for editing parameters is not available until the feature has been created.

These parameters are linked to a table defined by the **Table** (SQL name: TableName). This field is filled in from a system itemized list (a list whose values cannot be modified) containing all the tables in AssetCenter.

> A given feature may have different parameters for different tables.

The parameters of a feature include data-entry constraints, a default value and the contents of the extended help for this feature.

Data-entry constraints

The possible values for each constraint are as follows:

- Yes: The constraint is valid for all records in the table with which the feature is associated.
- No: The constraint is not valid for any record in the table with which the feature is associated.
- Script: Application of the constraint is subject to a BASIC script.

The table below summarizes the different data-input constraints applicable to a feature:

Constraint	Description
Available	Determines the availability of the feature.
Force display	Determines whether the feature is displayed by default.
Mandatory	Determines whether populating the feature is mandatory.
Historization	Determines whether history is kept for the values of the feature.

Default value

You can define a default value for a feature. This function is identical to that which is provided for other fields in the database.

Extended help

As for all other fields in the database, you can defines three sections of extended help for a feature.

Managing feature classes

A feature class groups features with common properties. For example, features such as "Processor level 1 cache" and "Processor level 2 cache" may be grouped in a feature class called "CPU".

Use the **Tools/ Administration/ Feature classes** *menu item to access the screen for editing and creating feature classes.*

Managing features

This section explains how to manage features.

You will find information on the following topics:

- Introduction
- Detail of the class tree structure
- Detail of features associated with a record
- Viewing features in a list

Introduction

To add a feature to a record, simply move to the **Features** tab in the detail of a record in the table in question. This tab includes two parts:

- The right-hand side lists the features already associated with the record. Here you can add or remove features using the ✚ and ➖ buttons.
- The left-hand side displays a tree view of the feature classes; it is used to filter the features in the right-hand side.

You can only add a feature to a record if the feature applies to the table containing that record, and if the feature is available. In other words:

- The table must appear in the **Parameters** tab in the feature detail.
- The value of the **Available** (SQL name: seAvailable) field must be set to **Yes** or to **Script** if the BASIC script updates the value of the field to **Yes**.
- The features for which input is mandatory cannot be removed and are not offered in add mode (by the ✚ button).

Detail of the class tree-structure

The left-hand side of the **Features** tab allows you to filter the features displayed in the right-hand side of the screen. It displays a tree view of the feature classes.

- When you select the 🖳 (All) node in the tree, AssetCenter displays all the features associated with the record (except for inheritable features) in the right-hand side of the tab.
- When you select a branch in the tree (therefore a class or a sub-class), AssetCenter displays the features for that class or sub-class in the right-hand side of the tab.

Two check boxes allow you to refine the display filtering:

- When you check the **With the 'inheritable' features** box, AssetCenter also displays the inheritable features, i.e. those whose **For inheritance purposes** field (SQL name: bForInheritance) is set to "Yes", in the right-hand side of the tab.

- When you check the **With sub-classes** box, AssetCenter also displays the features associated with the sub-classes of the selected classes, in the right-hand side of the tab.

Detail of features associated with a record

The right-hand side of the **Features** tab allows you to:
- View the features associated with the record

- Associate a feature with a record

- Remove a feature from a record

The **Features** tab in the record detail appears only if at least one available feature exists for this record's table (the feature is attached to the table and the **Available** field (SQL name: seAvailable) is set to **Yes** (either when specified directly, or defined with a script).

Associating a feature with a record

When you add a feature by clicking the ✚ button, AssetCenter opens the window for choosing the features available for the current record. This window displays the features in a tree structure, organized by class. This tree displays available features only, i.e. those whose **Available** field (SQL name: seAvailable) is set to **Yes** (either when specified directly, or defined with a script).

Now simply select the feature of your choice and click the [OK] button; AssetCenter will add it to your record.

This screen supports multiple selections using the CTRL and SHIFT keys. Thus you can add several features in a single operation.
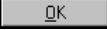
When you add a feature to a record in a table involved in the inheritance process (as the target table), two cases may arise:
- Either the feature is also attached to the source table, and it is inherited by the target table along with its default value.

- Or the feature is not attached to the source table. It is not inherited, and its default value is the one defined in the feature's parameters for the target table.

Removing a feature from a record

When you remove a feature from a record by pressing the ▬ button, AssetCenter opens a window for choosing the features already associated

with the record. This window displays the features in a tree structure organized by class.

Simply select the feature you want to remove and then click the [OK] button; AssetCenter removes the feature from your record.

This screen supports multiple selections using the CTRL and SHIFT keys. Thus you can remove several features in a single operation.

Features that are mandatory or displayed by default (i.e. those whose **Mandatory** parameter (SQL name: seMandatory) is set to **Yes** and those whose **Force display** parameter (SQL name: seForceDisplay) is set to **Yes**) cannot be removed from a record.

Viewing features in a list

Features are displayed in the **Features** tab of a record, but you can also view them in the list of records in a table.

To do this, click the list with the right mouse button to display the popup menu and select **Configure list**. AssetCenter opens the list configuration window.

The features associated with the table appear at the end of the list. First expand the tree to obtain a detailed list.

Then select a feature by clicking the [→] button. This adds a column to the list with the name of the feature in the header and the value of the feature for each record in the table. The [←] button removes a column from the list, and the [↑] and [↓] buttons change the order of the columns.

Inherited features

In some cases, a feature and its default value may be inherited, i.e. automatically copied from one table to another. The feature is added to the **Features** tab of a record, and the default value for the feature is copied for that record. This section explains how to create an inherited feature.

You will find information on the following topics:
- Cases where applied
- Defining an inheritable feature

- Methodology
- Example

For the remainder of this section, "Source table" refers to the table with the feature(s) to inherit and "Target table" refers to the table that will inherit one or more feature(s).

> The inheritance process requires that the feature in question be associated with both the source and the target table.

Cases where applied

Inheritance only applies in the following cases:
- From the table of "Categories" to the table of "Products": a product inherits the features associated with a category.
- From the table of "Products" to the tables of "Assets", "Training", "Contracts", "Consumptions" and "Work orders": The records in these table inherit the features associated with a product.

> In these three cases, features and default values in AssetCenter are inherited by default. This default behavior cannot be modified.
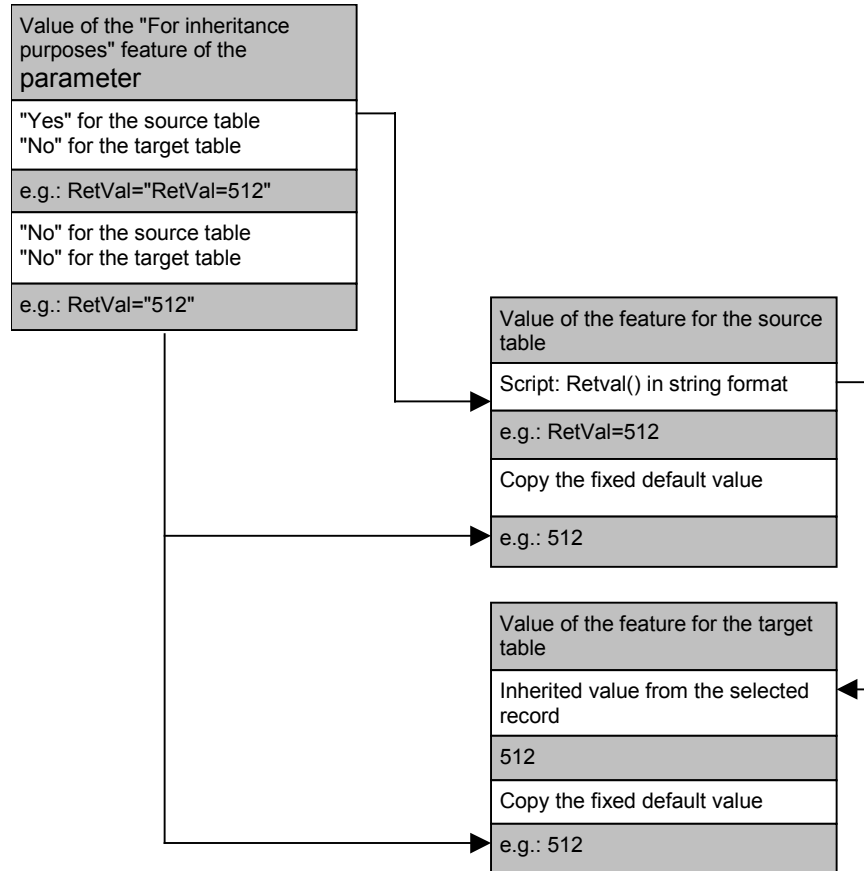
Defining an inheritable feature

The **For inheritance purposes** field (SQL name: bForInheritance) in the **Default value** tab (SQL name: RetValScript) in the feature parameter detail determines the type of default value for the feature:
- If this field is set to "Yes", the feature's default value is a default value inherited by the records in the target table, and defined by a formula containing the "RetVal()" function. This function represents the feature's inherited value.
- If this field is set to "No", the feature's default value is not considered to be inheritable by the target table. Therefore it is only used to define the feature's default value for records in the source table.

> In order for the target table to inherit a feature from the source table, the value of the **For inheritance purposes** field (SQL name: bForInheritance) must be set to "Yes" for the source table and to "No" for the target table.

The following diagram summarizes the inheritance process:

Value of the "For inheritance purposes" feature of the parameter
"Yes" for the source table "No" for the target table
e.g.: RetVal="RetVal=512"
"No" for the source table "No" for the target table
e.g.: RetVal="512"

Value of the feature for the source table
Script: Retval() in string format
e.g.: RetVal=512
Copy the fixed default value
e.g.: 512

Value of the feature for the target table
Inherited value from the selected record
512
Copy the fixed default value
e.g.: 512

Inheritance of features between a source table and a target table

To summarize, we have seen that the inheritance process for the feature's default value depends on the value of the feature's **For inheritance purposes** field (SQL name: bForInheritance) for the source and target tables:

- If this field is set to "Yes" for the source table and "No" for the target table, the feature's value for a record in the target table is defined by the "RetVal()" function of the feature associated with the record in the source table
- If this field is set to "No" in both the source table and the target table, the feature's value is the default value defined in the feature's parameters.

Methodology

Before looking at a practical example of this property of a feature, here is the method for efficiently implementing an inheritable feature:

- ✥ Analyze the situation: what are the source and target tables?
- ✥ Create or edit the feature.
- ✥ Add the feature to the source table's **Features** tab.
- ✥ Edit the value for the feature in that tab.
- ✥ Check that the inheritance process works correctly by creating a new record in the target table.

Example of an inheritable feature

In this example, we will create a feature whose default value will be inherited by all the assets attached to a single product.

Step #1 – Analyze the requirements

The feature is inherited from the table of products by the table of assets. Therefore:

- The source table is the table of products.
- The target table is the table of assets.

Step #2 – Create the inheritable feature: *For inheritance purposes* (SQL name: bForInheritance)

Select the **Tools/ Administration/ Features** menu item to display the screen for creating feature. Fill in the fields as shown below:

Field name	Field location	Field value
Title (SQL name: Title)	Feature detail screen	"Inheritance"
SQL name (SQL name: SQLName)	Top of the feature detail screen	"Inheritance" (is not important in this example: the field must nevertheless be filled in because it is mandatory)
Input type (SQL name: seDataType)	**Input** tab in the feature detail	"Numeric"

The click ⌷Create⌷ to create the feature.

For the source table

Now select the **Parameters** tab and click the ⊞ button next to the list of parameters. You must tell AssetCenter that this feature is associated and available for the source table and for the target table.

Fill in the "Add parameters to feature 'inheritance'" screen as illustrated below:
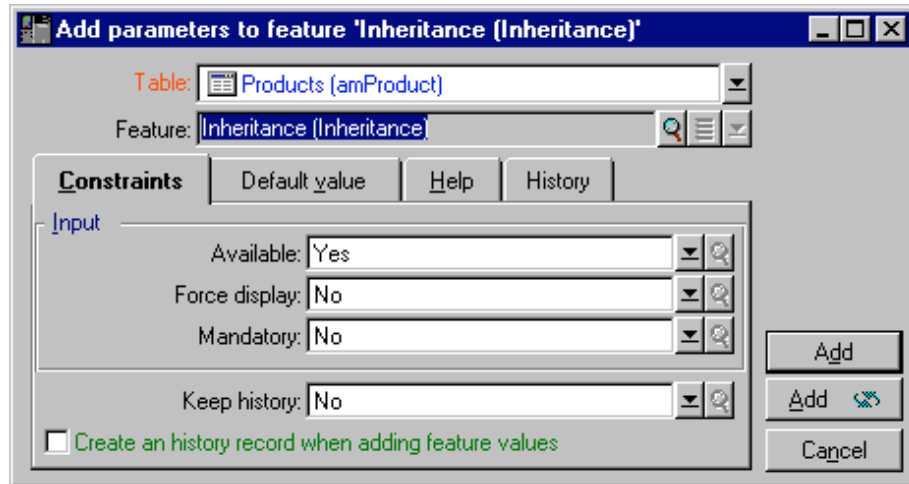
Parameters for the source table (table of products)

Finally, enter the value "Yes" in the **For inheritance purposes** field in the **Default value** tab.

For the target table

Now select the **Parameters** tab and click the ⊞ button next to the list of parameters. You must inform AssetCenter that this feature is associated and available for the target table. Click {uajout.bmp} to add this parameter to the feature.

Fill in the "Add parameters to feature 'inheritance'" screen as illustrated below:
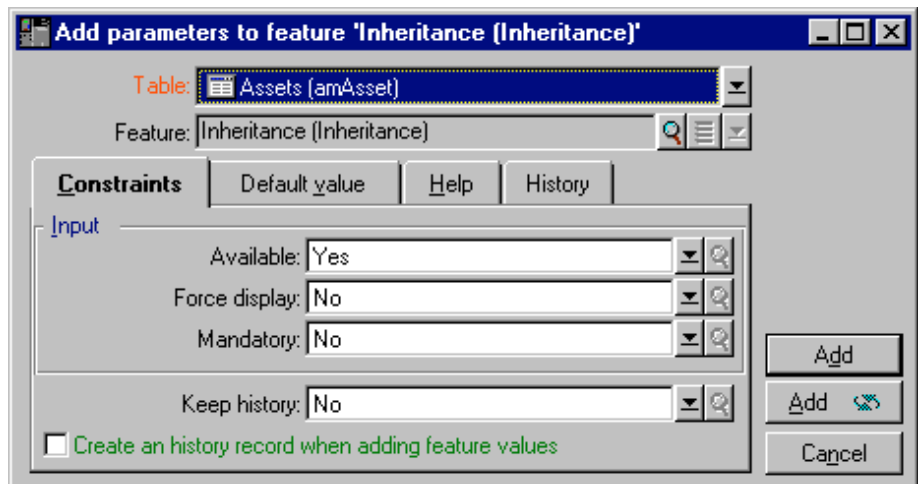
Parameters for the target table (table of assets)

Set the **For inheritance purposes** field in the **Default value** (SQL name: RetValScript) tab to "No". Click {uajout.bmp} to add this parameter to the feature.

Check

The list of parameters for our feature now looks like this:
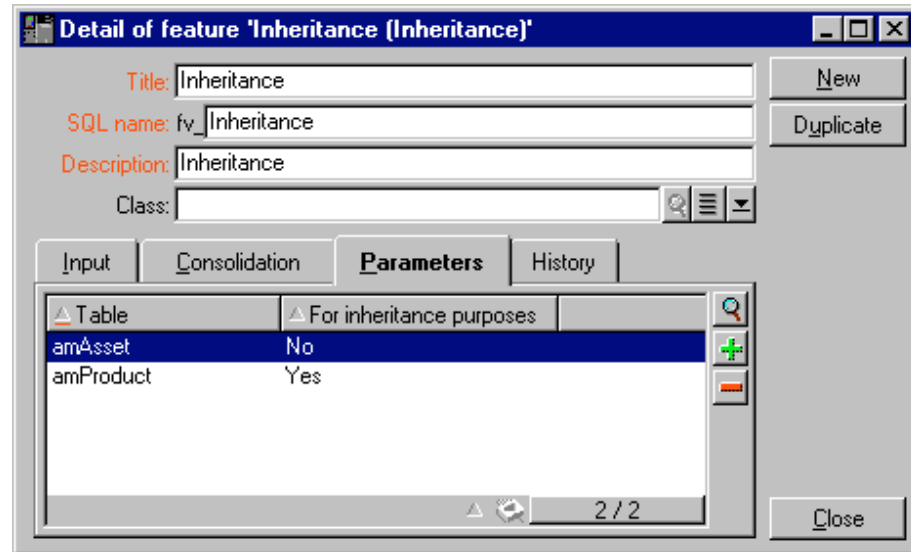
Parameters for the "Inheritance" feature

Click [Modify] to validate the modifications made to the feature's parameters.

Step #3 – Add the feature to the *Features* tab in the source table

Now you need to add the feature to a record in your source table. You can use any product. In this example, our product, an Asustek motherboard, is called "AsusLX512". Open the table of products and select a product. Click the ✚ button in the **Features** tab for this product and choose the "Inheritance" feature from the tree.

AssetCenter adds this feature to the **Features** tab as a programmable field.

Step #4 – Edit the value of the feature

Click 🔍 to edit the BASIC script for this field. This script determines the value of "RetVal()" (i.e. representing the "Inherited value"). In this example, we will use a purely numeric value that will be inherited by

assets containing the "AsusLX512" product. This can be any value; in our example, we use "512".

Therefore the script is as follows:
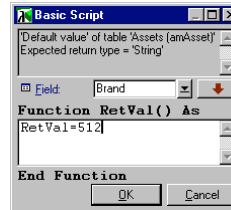
BASIC script for the inherited value

To finish, click the Modify button to confirm your changes.

Step #5 – Check that the inheritance works correctly by creating a new record in the target table

↺ In order to check the inheritance, we will create a new asset.

↺ To open the screen for creating a new asset, select the **Repository/ Assets** menu item or click the button.

↺ Click New to create a new asset.

↺ Select the **Features** tab. No features are displayed.

↺ Now enter in the **Product** (SQL name: Product) field the name of the product for which you added an inheritable feature (in step #3). To make sure our example is working correctly, check that the selected value is set to "AsusLX512"

↺ Select the **Features** tab. The "Inheritance" feature was added automatically and its value (defined in step #4) was inherited.
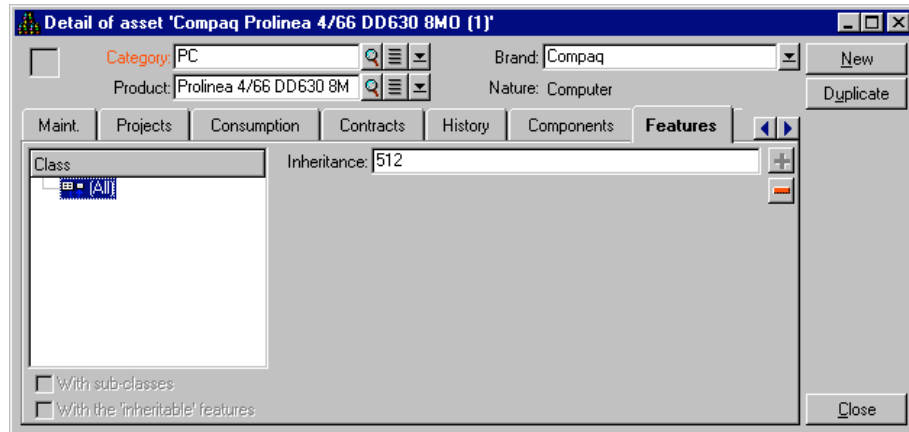
Inheritance of the feature in the target table

Populating features by selecting a record from another table

To populate this type of feature, select a record from another table: the feature is assigned the value of that field. We have chosen an example to illustrate this AssetCenter feature.

This example involves three steps:

- Scenario for the example
- Creating the feature
- Editing the filter for the source table of the link
- Verification

Scenario for the example

We will create a feature whose value is selected from the table of products. This feature, called "LinkTest", will be associated with the table of assets; its value will be provided by a field in the table of products.

In the remainder of this example, the table of products will be called the "Source table".

Creating the feature

Select **Tools/ Administration/ Features** to display the screen for creating features. Populate the fields as follows:

Declaring the link

Field name	Field location	Field value
Title (SQL name: TextLabel)	Feature detail screen	"LinkTest"
Name (SQL name: Name)	Top of the detail window of a feature	"LinkTest" (of no importance in this example, but this field must be populated because it is mandatory)
Input type (SQL name: seDataType)	**Input** tab in the feature detail	"Link"
To table (SQL name: TargetTableName)	**Input** tab in the feature detail	Table of products

Press ⬚Create⬚ to create the feature.

Now select the **Parameters** tab and click the ➕ button next to the list of parameters. You must inform AssetCenter that this feature is associated and available for the table of assets, as illustrated in the following screen:

*Available and associated feature (the **Available** (SQL name: seAvailable) field is set to "Yes") for the table of assets*

Editing the filter for the source table of the link

We previously created a feature linked to the table of products and defined it as available for the table of assets. Therefore the link has been created "physically". All that remains is to specify the information to be transferred by this link, i.e. which values from the table of products may be selected to populate the feature. These values may be:

- absolute values. For example, you can select for the value of the feature all the products of a certain type. The following example selects all the products of the "Asus" brand.

```
Brand="Asus"
```

- contextual values. You can select a value that depends on a field from the table of assets, e.g. all products associated with an asset of a certain brand. To define the context, use the "AmDbVal()" function.
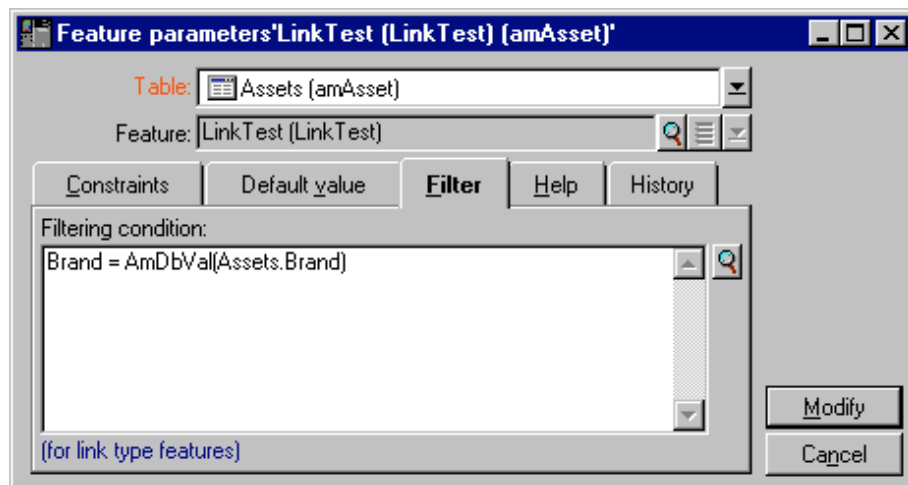
This function has the following parameters:

```
AmDbVal(<Target table for the link>:<Field in the target table>)
```

The following example defines the "Brand" field in the table of assets as the context:

```
AmDbVal(amAsset:brand)
```

Select the **Filter** tab in the detail of the parameters for the "LinkTest" feature and populate the tab as follows:


Filter for the source table (in this example, the table of products)

> The **Filtering condition** (SQL name: LinkFilter) field is a traditional query for a table, made using the expression builder. The fields used to build the query all belong to the source table of the link.

Verification

To check that the link we created performs its function, we will create a new asset, then add the "LinkTest" feature to it.

- ✋ Open the screen for creating an asset by selecting the **Repository/Assets** menu item or by clicking the 🟦 button.

- ✋ Click New to create a new asset.

- ✋ Select the **Features** tab. No features are displayed in the tab.

- ✋ Populate the asset's **Category** (SQL name: Category) field, which is a mandatory field, and create the link by clicking the Create button.

- ✋ Next populate the asset's **Brand** (SQL name: Brand) field.

- ✋ Click the ➕ button in the features tab and choose the "LinkTest" feature in the selection screen displayed by AssetCenter:
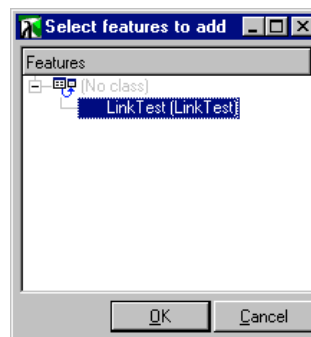
Selecting the "Link" type feature in the feature tree

AssetCenter adds the "LinkTest" feature to the **Features** tab in the new asset's detail.

- • Now click the ⬛ button next to the "LinkTest" feature. We will choose a value from the table of products to populate this field. The itemized list allows us to choose from the product brands matching the asset's brand, as shown in the following screen:
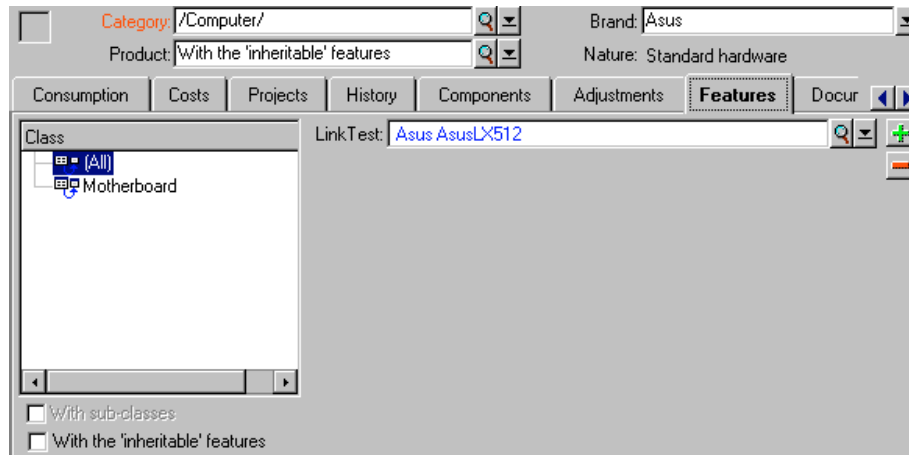
Verifying that the link works

Our feature performs its role as a link between the table of products and the table of assets.

Chapter 14 - Associating documents with database records

This chapter explains how to associate documents with records in the AssetCenter database. You will find information on the following topics:

- Definition of a document
- Creating or deleting documents associated with records
- Opening a document using an action

The **Documents** *tab which can be found in record details for the majority of tables in the AssetCenter database allows you to access the documents that are associated with records.*

You can access the table of documents directly by using the **Tools/ List of screens** *menu item, "amDocument" table.*

Definition of a document

A document is a reference to a printed document (manual, contract, etc.) or a the full pathname to a computer file.

External files are not stored directly in the database.

It is possible to associate one or more documents with the majority of records in the AssetCenter database.

When a document gives a full path to a file, it is possible to use this file dynamically via actions. For example, an action can open the file by launching the application associated with the file.

Creating or deleting documents associated with records

Documents associated with a record appear in the **Documents** tab of the record detail. Each individual document is described in a sub-tab. To add, duplicate or delete a document, right-click within the tab and select the **Add linked record**, **Duplicate linked record** or **Delete link** options from the popup menu.

You can create as many documents as you want.

File field (SQL name: FileName)

The **File** field allows you to specify the full path of a file, without having to store the file itself in the database.

We recommend using the full network pathname of the file, so that all users are able to locate the designated file.

For example, under Windows NT, with a user "christopher" with a shared folder named "Files", the network address of the file "document.doc" will be:

```
\\christopher\files\document.doc
```

You can enter the pathname directly or click the ▣ to find the file graphically.

The specified file can be used in "Executable **Type** actions. This is the main advantage of the **File** field.

Opening a document using an action

When a document gives the full pathname of a file, it is possible to use this file dynamically by means of actions.

Creating an appropriate action

As an example, we are going to create an action that allows you to open the file specified in the **File** field (SQL name: ActionFile) of a document. The program that opens the file is the one associated with the filename extension by the Windows file manager.

Display the list of actions using the **Tools/ Actions/ Edit** menu item. Create a new action. In particular, populate the following fields:

Field	Value
Name (SQL name: Name)	Name of your choice
Context (SQL name: ContextTable)	Documents (amDocument)
Type (SQL name: seActionType)	Executable
File (SQL name: ActionFile)	{FileName}

Executing the action to open the file

↳ Display the detail of a record (of an asset, for example).

↳ Select the **Documents** tab.

↳ Describe a document in a sub-tab of the **Documents** tab.

↳ Populate the **File** field (SQL name: FileName). Select a file whose extension is associated with a program.

↳ Place the cursor on any field in the description sub-tab of the document.

↳ Right-click to activate the popup menu. The **Actions** command gives the list of actions associated with the table of documents. You will find the action you have created.

Actions that concern links cannot be triggered with the **Tools/ Actions** menu item or the 🔲.

Chapter 15 - News

This chapter explains how to broadcast and manage news with AssetCenter.

You will find information on the following topics:

Introduction

- Definition of a news item
- Overview of news

Information on news

- Importance of news
- Message to be diffused
- News diffusion list

Consulting news

- Displaying news

Use the **Tools/ News** *menu item to display the list of news items.*

Use the **Tools/ Display news marquee** *menu item or the* *icon in the toolbar.*

Definition of a news item

A news item is an item of current information you want to diffuse to a defined number of individuals for a given period.

These persons are members of employee groups.

As a general rule, news items only concern short-lived information.

Example of news item: "Server XXX will be down between 11:00 and 12:00 on February 10, 1997".

Overview of news

Creating a news item

All users of AssetCenter with the appropriate user rights on the table of news can create news items using the **Tools/ News** menu item.

In the detail of the news item you will find, in particular:

- the message,
- the diffusion list of the message,
- the period of validity of the message.

Consulting the news

All users can display the news marquee. Messages which concern the currently logged user are displayed.

{bmc zjump54.bmp} Importance of news

Each news message is associated with an **Importance** (SQL name: seSeverity).

To define the importance of a news message, simply populate the **Importance** field (SQL name: seSeverity) at the top of the news detail screen.

The color of the news in the marquee changes depending on the selected importance.

Use the **Tools/ Options** menu item, **Helpdesk** tab, "x Importance" fields to modify the color scheme. These colors are specific to the individual client configuration.

Message to be diffused

The **Message** tab in the news detail contains the message to be diffused to designated recipients.

The maximum permitted length of a message is 232 characters. All characters can be used.

News diffusion list

The **Diffusion** tab in the detail of a news item lists the employee groups that can read the news item.

Warning: Employee group supervisors, and the administrator of AssetCenter can only see the news messages if they are a member of an employee group that is designated in the news diffusion list.

Warning: Employee group supervisors and the administrators of AssetCenter can only see the news messages if they are a member of an employee group that is designated in the news diffusion list.

All employee groups box (SQL name: bAllGroups) checked

If you check this box, the message will be visible by the members of all employee groups.

All employee groups box unchecked

In this case, the message will be visible to the members of the employee groups selected in the **Diffusion** tab

Use the ![+], ![−] and ![Q] buttons to add, remove, view or modify the employee groups in the diffusion list.

Include sub-groups (SQL name: bChildGrps) check box

A news message may be diffused to all the employee groups, or to a selection of groups. Because the table of employee groups is hierarchic, AssetCenter provides the ability to diffuse a news message to all the sub-groups of a given group.

The **Include sub-groups** (SQL name: bChildGrps) check box performs this function.

When you check this box and a group is selected, the news message is propagated to all the hierarchic sub-groups in this group.

By default, the **Include sub-groups** box (SQL name: bChildGrps) is checked.

Displaying news

In order to view the news:

- Activate the news marquee.
- Use the buttons to the right of the marquee to scroll and browse the news items.

You can define:

- The color scheme for the news items according to their importance.
- The automatic refresh mode in the news marquee tool bar.

Activating the news marquee

All users of AssetCenter can display the news marquee. Messages which concern the currently logged user are displayed. The news marquee can be activated and deactivated in two different ways:

- Using the **Tools/ Display news marquee** menu item.
- Using the icon in the toolbar.

Buttons in the marquee tool bar

	Click this button to read the current news items without having to wait for the next defined time in the **Tools/ Options** menu item, **Caches** tab, **News** line.
	Click this button to display the previous message.
	Click this button to display the following message.
	Click this button to suspend or resume the messages being displayed.

Selecting the color scheme

A user of an AssetCenter client machine who is is an AssetCenter administrator, employee group supervisor or member of an employee group can define a personal color scheme for the news marquee using the **Tools/ Options** menu item, **Display** tab, **x importance** fields.

Unlike certain other options in the **Tools/ Options** menu item, you can only access the options in the **Display** tab if you are connected to the database as an authorized user (see the above list).

Automatic refresh mode in the news marquee

An AssetCenter administrator, employee group supervisor or member of a employee group can define the frequency at which current news items are displayed via the **Tools/ Options** menu item, **Messaging** tab, **At login** zone, and **Regularly every** fields.

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