AssetCenter™

Version 3.5

Best Practices

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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

This document is an introduction to Best Practices in AssetCenter. Best Practices are a set of techniques used to improve internal management and business processes.

The implementation of Best Practices in AssetCenter is flexible, user-friendly, and customizable. Feel free to customize and experiment with the standard wizards and workflows.

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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 - Presentation of Best Practices

Definition

Best Practices designate collectively:

- processes,
- techniques,
- new ways of using equipment or resources.

Efficient Best Practices allow improvements in terms of:

- costs,
- delays,
- quality,
- performance, or
- any other measurable factor that has a significant impact on the functioning of an organization.

For example: By automating its procurement cycle, an organization can significantly reduce its administration costs.

In AssetCenter, Best Practices allow improved management of:

- assets,
- the procurement cycle,
- cost,
- contracts.

The following diagram shows the aspects of management, in each domain, that are improved by Best Practices.

Asset Management	Procurement Cycle
• Stock Management • Multiple Selection	• Orders and Quotes • Receiving • Work Orders

Cost Management	
• Stock valuation • Billing	Contract Management
	• Multiple Selection • Returns • End of term management

Best Practices in AssetCenter

Best Practices in AssetCenter implemented in the form of:

- actions:

  ❖ wizards ( ),

  ❖ scripts ( ).

- workflows ( ).

Wizards give you a step-by-step guide to the data-entry process. They are not linked to a table in particular. Script type actions have a specific context of execution (an AssetCenter table).

For a presentation of actions, refer to "Reference Guide: Administration and advanced use of AssetCenter", chapter "Defining actions".

Workflow schemes group together a series of actions that are triggered according to a user-defined schedule. Use of workflow makes it possible to automate business processes.

For a presentation of workflow, refer to "Reference Guide: Administration and advanced use of AssetCenter", chapter "Workflow".

Installation

Best Practices are installed with the AssetCenter demonstration database.

Bstprac.bat file

This batch file allows you to import the Best Practices modules into an AssetCenter database. From a command prompt, go to the **Datakit** subfolder of the AssetCenter installation folder. The command to enter is as follows:

```
…\Datakit>bstprac <Database name> <Log file> <Administrator password>
```

To import this file into the demonstration database, AC350test, enter the following command:

```
…\Datakit>bstprac AC350test log
```

In this example, the administrator password is empty.

Bstprac.dbf file

This file contains actions that allow you to modify the database configuration using AssetCenter Database Administrator.

The Best Practices use specific default values for certain fields. To implement

    ‽ Start AssetCenter Database Administrator.

    ‽ Connect to the database for which you want to implement the default values.

    ‽ Select **Action/ Apply modifications to the database configuration**

    ‽ Select the **Bstprac.dbf** file, which is located in the **Datakit\Bstprac** subfolder of the AssetCenter installation folder.

The new default values are applied to the database. To view the list of default values that are dealt with by this operation, open the **Bstprac.dbf** file with a text editor.

AssetCenter Server

You must start AssetCenter Server on your demonstration database to generate rents and activate workflows for certain Best Practices.

To start AssetCenter Server, there are two methods:

First method

    ‽ Select **AssetCenter Server** in the AssetCenter program group.

↳ Select **File/Connect** to connect to the demonstration database**.**

Second method

↳ Open a command prompt

↳ Enter the following command:

```
aamsrv32 -cnx <Name of the demonstration database> -login:
<login> -password : <password linked to login>
```

For example:

```
aamsrv32 -cnx ACdemo350ENG -login: Admin
```

In this example the administrator password is empty.

Chapter 2 - Best Practices in AssetCenter

Best Practices are implemented as:

- actions (wizards or scripts)
- workflow schemes.

Use the Tools/Actions menu item to access the list of actions.

"Script" type actions are only available in their proper context; For example: the *"Order via e-mail"* script only appears when you are in the order screen.

Use the Tools/Workflow/Workflow schemes menu item to access the list of workflow schemes.

Improved asset management

Improved asset management concerns:

- stock management
- multiple selection of assets and users

Stock management

Type	Name
	Issue assets from stock

Objective
This wizard allows you to simplify the issuing of assets for stock, taking into account reservations.

Description
Select a stock and assets in this stock then assign them to a user and a location.

The **Filter on stock** filter allows you to view:

- Assets in stock reserved for the user
- All assets in stock
- Assets in stock reserved for the user or not reserved

If you are interested by reservations, select **Assets in stock reserved for the user** or **Assets in stock reserved for the user or not reserved** filter; If you are not interested by reservations, select **All assets in stock**. In this case, the wizard checks whether the asset to be issued is reserved, in which case you have several choices:

- Replace the asset with similar asset in stock
- Order a new asset
- Cancel the reservation.

When it is executed, the wizard assigns he asset to a user and a location and if necessary, creates an order for a product and modifies or cancels the reservation of the asset to be issued.

Type	Name
🪄	Retire assets

Objective
This wizard allows you to remove both assets in use or in stock.

Description
Select the assets to retire, then indicate whether you also want to remove these assets from their cost centers and budget. Next, in one single operation, you can:

- place the selected assets in stock,
- dispose the assets,
- sell off the selected assets,
- return leased assets.

For each assets in the selection, define the action to be carried out, then click **Apply action to selected assets**. Enter the appropriate information according the action, then on the following screen, select an adjustment (optional). Click **Finish**, to perform the updates.

Multiple selection of assets and users

Type	Name
🪄	Assign employees and assets to a project

Objective

In AssetCenter, you can only assign one asset and one user to a project at a time. The **Assign employees and assets to a project** wizard makes it easy to assign a whole group of employees and assets to a project.

Description
Select the project, employees, and assets, then specify the inclusion and removal dates.

Click **Finish**. The wizard creates the corresponding records, which you can view in the **Assets** and **Employees** tabs in the **Projects** table (SQL name: amProject).

Improved management of the procurement cycle

This concerns:

- purchase orders and estimates/quotes
- receiving
- work orders

Orders and estimates

Type	Name
✨	Multiple creation of purchase orders
✨	Multiple creation of estimates

Objective
These two wizards allow you to create or modify orders and estimates using existing order lines for a supplier.

Description
Select a supplier. All existing request lines for this supplier are shown. Select the lines for which you want to create an estimate or an order. You can add request lines by clicking **Add request lines** and completing the request.

After verifying the summary screen, execute the wizard. The orders or estimates are created in AssetCenter. You can view them in the **Orders** (SQL name: amPOrder) or **Estimates** (SQL name: amEstimate) tables.

Type	Name	Context
▪️📇	Order via e-mail	📋 Orders (amPorder)
▪️📇	Estimate via e-mail	📋 Estimates (amEstimate)

Objective

Use these actions to send an e-mail summarizing the order or the requested quote to the supplier.

Description

The message lists:

- The information concerning the supplier.
- The estimate or order lines.
- The delivery addresses for each line or for all lines.

You can launch these actions from the **Orders** (SQL name: amPOrder) and **Estimates** (SQL name: amEstimate) tables. You can customize them by adding secondary recipients (**Cc:** field of the message) and modifying the layout of your message. Customizing these two actions is described on page 17.

You must configure the external messaging system correctly and enter information concerning the supplier, in particular the **Email** field in the **Suppliers** table (SQL name: amCompany) and the **EMail** field in the **Contacts** table (SQL name: amContact).

Type	Name
🪄	Reconcile supplier invoice and order

Objective

This wizard allows you to generate invoice lines in AssetCenter from the order lines and the invoice you have received from your supplier. You can reconcile billed amounts and ordered amounts and also enter additional invoice lines that do not appear on the order, such as shipping costs.

Description

Select a supplier, enter an existing purchase order number, a new number or even the supplier's invoice number. Enter the grand total of

the printed invoice and the total amount of taxes. Next, select the order lines to reconcile with the paper invoice or select **Select all purchase order lines**. Click **Next**.

If you enter an existing purchase order number and the order lines have already been invoiced, they are displayed.

Select **Add an invoice line to the above lines** if you want to add an invoice line. Then populate the fields that appear, then click **Add invoice line**. The values displayed in the **Pre-tax total** and **Tax amount** columns can be modified. You can remove an invoice line by clicking **Remove the line selected above**.

Enter a status for the invoice: **Reconciled**, **In progress,** or **Refused**.

When you execute the wizard, it creates or updates the invoice. The total invoiced amount and total taxes invoiced are shown in the **fv_RealNetAmount** and **fv_Realtax** feature fields in the **Supplier invoices** table (SQL name: amInvoice), **Features** tab.

Receiving assets

Type	Name
	Receive assets

Objective
This wizard simplifies the receiving process for assets you have ordered. In one single operation, you can assign the received assets to a stock and/or a user.

Description
Select a delivery slip number. Specify the quantities to receive, either in the **To receive** column, or by selecting several specifying the quantity then clicking OK.

Next, select a supplier for each order line, assign the asset to a selected stock or to a user and location in the list.

The wizard performs the necessary updates in the database.

Work orders

Type	Name	Context
	Update a work order	🗐 Work orders (amWorkOrder)
	Create a work order	🗐 Requests (amRequest)
	Auto-create work orders	🗐 Requests (amRequest)
	Work order tracking	🗐 Work orders (amWorkOrder)

Objective
Combined, these workflows and actions allow you to create work orders from purchase requests and to track and update these work orders automatically.

Only those work orders whose **Type** field is set to **Internal maintenance** are concerned.

Description
The **Auto-create work orders** workflow periodically monitors request which have the following conditions:

- The request is not satisfied (**Request satisfied** field, **Tracking** tab in the **Requests** table)
- The request contains lines whose conditions are the following:
  - ❖ The request line creates a work order (**Create** field, **Transfer** tab of the request line)
  - ❖ The requested product is **Internal maintenance** (**Type** field in the **Work order** tab of the product detail).
  - ❖ The quantity to be received is greater than 0.

When all these conditions are met, the workflow triggers the **Create a work order** action, which creates a new work order.

The **Work order tracking** workflow monitors work orders at the level of the **Technician** field (SQL name: Technician) field of the table. When you update the value of this field and the following conditions are met:

- The type of the work order is **Internal maintenance**
- The **Technician** field is populated
- The work order is not closed.

The workflow is triggered. You must execute the **Update a work order** wizard manually to update the work order with the planned start and end dates, the technician, the effective start and end dates, and a diagnosis.

The workflow process ends when the work order is closed.

Improved cost management

This concerns:

- the value of the stock
- invoicing

Stock valuation

Type	Name	Context
▪️🔲	Weighted average cost	📋 Stock line (amProdStockLine)
▪️🔲	WAvgDelivery	📋 Delivery lines (amDelivLine)
⚙️	WAvgPropagate	📋 Delivery lines (amDelivLine)
⚙️	Weighted average cost	📋 Stock lines (amProdStockLine)

Objective
This function, which includes two workflows and two actions, has been created in order to improve stock valuation. The weighted average cost of a consumable corresponds to its average purchase price (Total purchase price divided by the number of consumables in stock). For example, if you buy a batch of 20 consumables at 10 USD, then later another identical batch at 15 USD, the weighted average cost of this consumable is: $(20*10 + 20*15) / 40 = 12.5$ USD.

When one of these consumables is issued from stock, the cost incurred calculated as the weighted average cost.

Description
The **WAvgPropagate** workflow monitors the **Quantity received** field (SQL name: lQty) in the **Delivery lines** table. When this field is created, updated or deleted, or when a new delivery line is created, the workflow launches the **WavgReception** action. This script updates a feature in

the products table: the **Last price used** feature (SQL name: fv_LastPriceUsed). The value of this field corresponds to the last unit purchase price as shown on the corresponding order line.

When the **Total quantity** field (SQL name: lTotalQty) in the **Stock line** tab (SQL name: amProdStockLine) is changed, or when you add or remove consumables from stock, the **Weighted average cost** workflow is triggered and launches the **Weighted average cost** action, which calculates the weighted average cost of the consumable. This calculation is based on:

- The value of the **Total quantity** field (SQL name: lTotalQty) of the stock line.
- The value of the **Value** field (SQL name: mValue) of the stock line (total purchase price).
- The **lPrevQty** field in the **Features** tab, which stores the quantity of the consumable in stock before update. When the action is triggered, this field inherits the value of the **Total quantity** field.
- The last purchase price of the consumable defined in the **Last price used** feature in the **Products** table (SQL name: amProduct).

The weighted average price is then propagated to the consumption level, each time a user uses a consumable, the unit price of the consumption defined in the **Unit price** field (SQL name: mUnitPrice) in the **Consumptions** table (SQL name: amConsUse). By default, this price is equal to the total value of consumables in stock (Number * Price) divided by the quantity in stock.

Invoicing

Type	Name
✨	Reconcile supplier invoice and expenses

Objective
This wizard allows you to reconcile a supplier invoice, linked to one or more contracts, and the corresponding expense lines. It mainly concerns the reconciliation of contract rents.

Description
Select the lessor, the contract corresponding to the invoice you have received, and optionally an invoice number. Enter the invoice date, delivery date, the total invoiced amount, and taxes from the printed invoice, and then select the contract expense lines to reconcile with the

supplier invoice. The expense lines are linked to an invoice. The wizard generates a single expense line for the whole invoice with the selected status. The real net amount and tax amount are stored in the **Real net amount** (SQL name: Fv_RealNetAmount) and **Real tax amount** (SQL name: Fv_RealTax) fields, **Features** tab, in the **Supplier invoices** table.

Improved contract management

Improved contract management concerns:

- multiple selection of assets for the same contract
- return notification
- end of term notice

Multiple selection

Type	Name
✨	Add assets to a contract (SQL name: Ast2Cntr)

Objective
In AssetCenter, you can only assign one asset at a time to a contract. The **Add assets to a contract** wizard makes it easy to assign a whole group of assets to a contract.

Description
Select the contract, the assets you want to assets, and their inclusion and removal dates for the contract.

Click **Finish**. The wizard creates the corresponding records, which you can view in the **Assets** tab of the **Contracts** table (SQL name: amContract).

Return notification for assets on contracts

Type	Name	Context
🧩	Notify approaching end of term for asset	📄 Contracts (amContract)
🧩	Keep asset rents in sync with the contract	📄 Contracts (amContract)

	Keep contract rents in sync with the contract	▦ Contracts (amContract)
	Update end of rent period of asset	▦ Asset rents (amContract)
	Update end of contract rent period	▦ Contract rents (amContract)
	Notify users of approaching end of term	▦ Contracts (amContract)

Objective
This set of workflows and actions allows improved management of returns and rent payments both at the asset level and the contract level.

Description
The **Notify approaching end of term for asset** periodically monitors the end dates of leasing contracts. If the end of term date is greater than the current date, then the **Notify users of approaching end of term** action is executed. This action compares the time between the notice period defined in the amOption table and the difference between the end of term date and the current date. If the notice period is less than or equal to the difference, then the user of the leased asset is notified by e-mail of the end-of-term date.

The **Keep contract rents in sync with the contract** and **Keep asset rents in sync with the contract** workflows function in the same way. They are launched periodically and monitor the asset or contract end of rent period date. If this date is greater than the end of term date, then the **Propagate the contract rent end date** or **Propagate the asset rent end date** action is launched. This action propagates the end of term date of the contract, **End** field (SQL name: dEnd) in the **Contracts** table (SQL name: amContract) to the end of rent date of the contract, **End** field (SQL name: dEnd) in the **Schedule level rents** table (SQL name: amCntrRent) or of the asset, **End** field (SQL name: dEnd) in the **Asset rents** table (SQL name: amAssetRent).

End of term notification

Type	Name	Context
	Notify approaching end of term (Ref: BST_CNTR_END_NOTIF)	▦ Contrats (amContract)
	Notify end of contract (SQL name: BstCntrEndNotifSet)	▦ Contrats (amContract)

	Reset end of term notification (SQL name: BstCntrEndNotifReset)	Contrats (amContract))

Objective

This set of workflows and actions allows you send notification via e-mail of approaching end of terms of contracts to their supervisors.
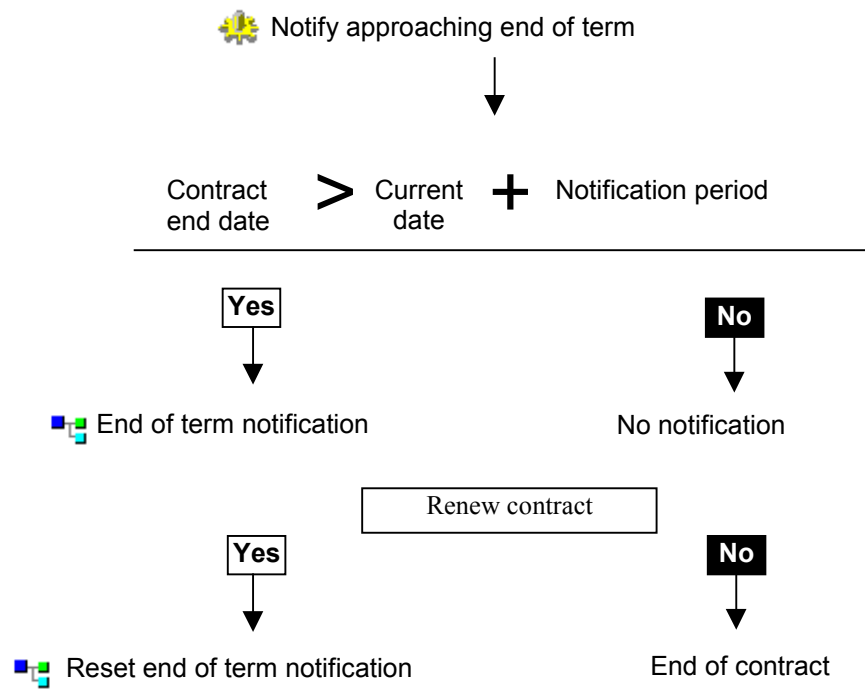
Description

The **Notify approaching end of term** workflow checks whether the **End** date (SQL name: dEnd) in the **Contrats** table (SQL name: amContract) is greater than the current date plus the **Notification** period of the contract (SQL name: tsNotice) and the **Notification period** (SQL name: IUserNotifDay) in the table of options (SQL name: amOption). This user notification period is set to 30 days in the demonstration database.

Every day, at 3 A.M., the workflow performs this check. If this date is less than the sum of the date and the notification period, then no mail is sent to the supervisor.

If this date is greater, the **Notify end of contract** action is executed. The result of this action is twofold:

- a message is sent to the contract supervisor

  The body of the text is as follows: "Approaching end of term for contract #X. The referenced contract is approaching end of term. To comply with the notice period, you must make a decision concerning renewal or termination."

- the **Approaching end of term notified** feature (SQL name: fv_bEndNotified) in the table of contracts is set to 1.

According to the mail received, the contract supervisor can contact the user and extend the contract period. In this case, the **Reset end of term notification** resets the value of this feature in the table of contract to 0.

Notify approaching end of term

Contract end date **>** Current date **+** Notification period

| Yes | No |

End of term notification

No notification

Renew contract

| Yes | No |

Reset end of term notification

End of contract

Chapter 3 - Customization

This section describes how to customize:

- Purchase orders and requests for quotes via e-mail,
- Weighted average cost calculations.

Orders and quotes via e-mail

Customizing orders and requests for quotes via e-mail consists in:

- changing secondary recipients
- changing the layout of your message (HTML formatting).

Use the Tools/Actions/Edit menu item to perform these two actions.

List of actions

Modify this script to customize the action
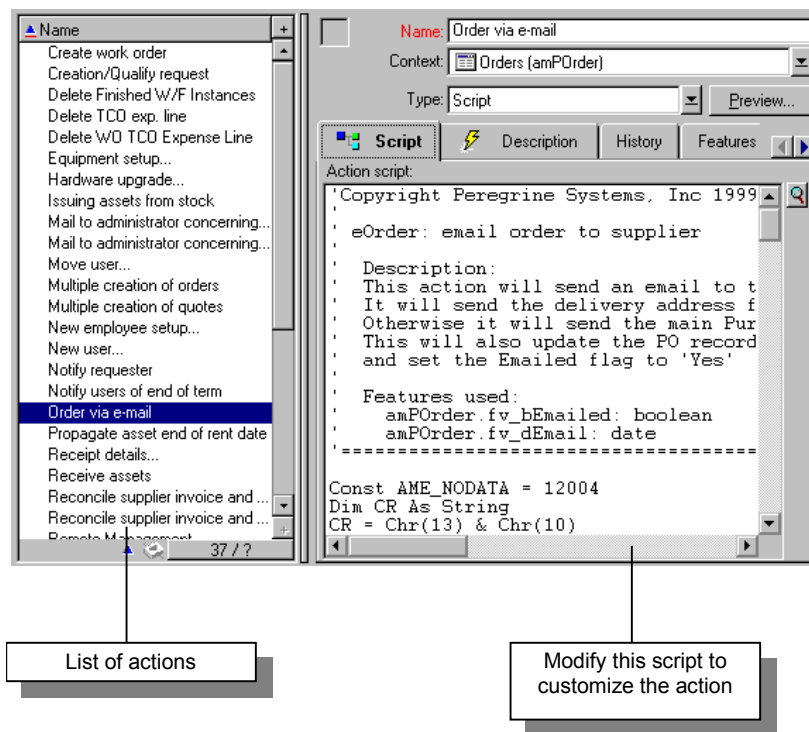
Action edition window

In the action edition window, select **Order via e-mail** or **Request quote via e-mail**.

To customize each of these action, select the **Script** tab in the detail window of the action. Now modify this script.

Changing recipients

Secondary recipients are recipients receiving a copy of the message. This corresponds to the **Cc:** field (carbon copy or courtesy copy), which appears in the header of e-mail messages.

To specify secondary recipients, modify the second parameter of the **AmActionMail** function in your script.

To send a copy of a message to other contacts at the supplier according to a job title (Sales engineer, inventory manager, etc.):

- Define a new variable.

  [Name of the variable] = AmDbGetString("Select Email From amContact Where Title='[Title the contact]' and Company.Name = '" & [Supplier.Name] & "'") print "--> " &[Name of the variable]

  For example: You want to send your order to all sales engineers at the supplier. Define a variable, *SalesEngineer*.

```
Dim Commercial as String

SalesEngineer=  AmDbGetString("Select Email From amContact Where
Title='Sales Engineer' and Company.Name = '" & [Supplier.Name] &
"'") print "--> " &SalesEngineer
```

- Add this variable to the AmActionMail function of your script.

  AmActionMail([Contact.EMail],"[Name of your variable]","",Subject,MsgBodyHdr & List & MsgBodyFtr,0,0,"","",0)

```
AmActionMail([Contact.EMail],SalesEngineer,"",Subject,MsgBodyHdr
& List & MsgBodyFtr,0,0,"","",0)
```

To add more secondary recipients, simply add them one after another using separated by semi-colons.

Changing the layout of the message

By adding HTML tags in your script, you can modify the message layout.

Modifying the style of a line

To modify the layout of your lines, you can add opening and closing tags in quotes prefixed and suffixed by the **&** concatenation sign.

This modifications will only have an effect if you recipients mail client supports HTML.

For example: You want to put the character string "PURCHASE ORDER" in "H3" style (header level 3) in HTML language. Make the following change in the **Set up Email** section of your script.

Line before modification
```
MsgBodyHdr = MsgBodyHdr & "*** PURCHASE ORDER ***" & CR
& CR
```

Line after modification
MsgBodyHdr = "<H3>" & MsgBodyHdr & "*** PURCHASE ORDER ***" & CR & CR &"</H3>"

Here is a short list of the most common HTML tags:

Tags	Function
<H*n*></H*n*>	Header (The font size is inversely proportional to the number *n*) H1 = first level header.
<B></B>	Bold
<I></I>	Italic
<EM></EM>	Italic (Emphasis)
<STRONG ></STRONG >	Bold italic

Presenting lines in a table

To present the lines in table form, you can add the following tags in the **Retrieve Order Lines of current POrder** section(Order via e-mail) or **Retrieve Lines of current Estimate** (Request estimate via e-mail).

Tags	Function
<table></table>	State the start and end of a table.
<tr></tr>	State the start and end of a line in the table
<td></td>	State the start and end of a cell in the table.

Using the different parameters (*Width, Font, Borders*), you can indicate the width, font, size of borders of your tables. Refer to a guide to the HTML language for further information.

Weighted average cost

The **WAvgDelivery** action of the **Weighted average cost** workflow inserts the **Last price used** feature (SQL name: fv_LastPriceUsed) into the table of the products.

You can chose whether to propagate this price to the **Price** field (SQL name: mPrice) in the table of products. For this, make the *WAvgDelivery* variable in the **WAvgDelivery** equal to **mPrice**.

In AssetCenter, the **mPrice** field in shown in the **General** tab of the **Products** table.

The mPrice field in the table of products

The **Update the options table** wizard allows you to set the value of a variable.

*Use the Tools/Actions/Update the options table menu item to access this wizard.*

In the first page, populate the following fields:

- **New section**: Indicate which type of user needs this option. This must start with *User*. For example: *UserBstInventory*.
- **New option**: This line corresponds to the variable to which you want to assign a value.

To change the value of the **WAvgDelivery** option:

 ✥ Double click the **Value** column of this option.

 ✥ Replace **"fv_LastUsedPrice"** with **"mPrice"**.

In this cell, enter the value that you want to assign to the **WavgReception** variable.
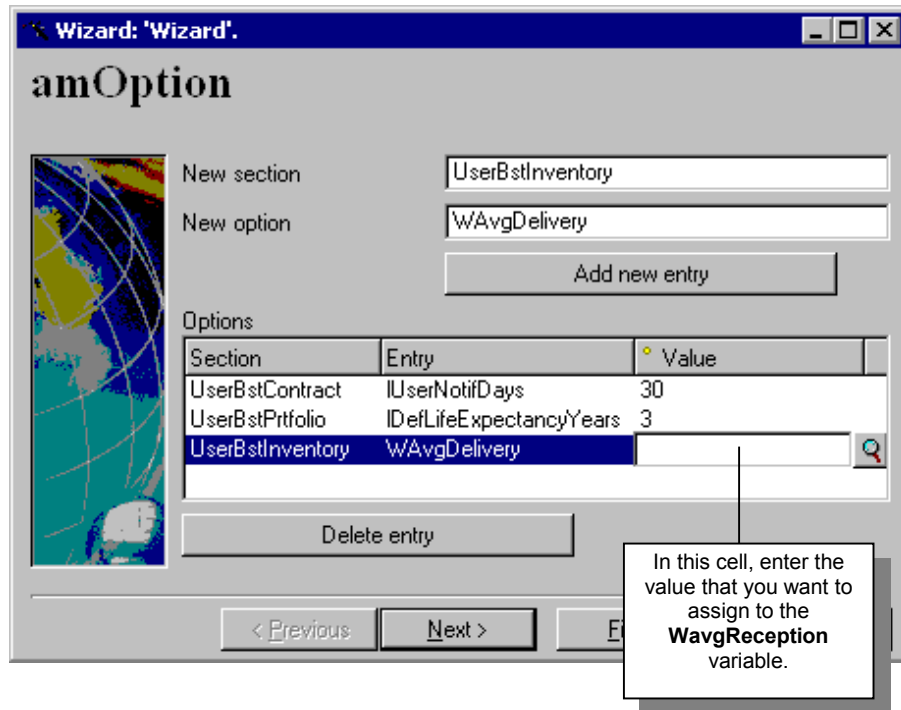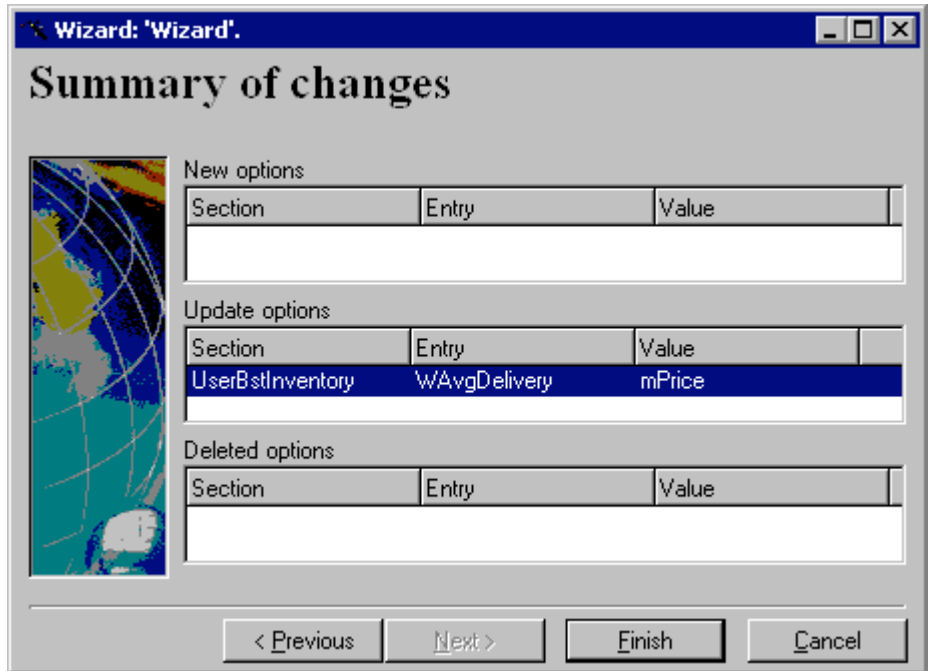
First page of the Update the options table wizard

By clicking the magnifier you can browse the values of all fields of all tables in your AssetCenter database.

To show the last price used over in the features table, set the value of the **WAvgDelivery** option to **fv_LastPriceUsed**.

The second page of the wizard summarizes all changes made to the options.

Second page of the Update the options table wizard

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