

# **AssetCenter™**

**Version 3.5**

## **Reference Guides: Global Table of Contents, Index and Glossary**

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The Infrastructure Management Company™



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The names of companies and individuals used in the sample database and in examples in the manuals are fictitious and are intended to illustrate the use of the software. Any resemblance to actual companies or individuals, whether past or present, is purely coincidental.

### **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 manual contains the tables of contents and the indexes for the following manuals:

- "Introduction" : ITEM ACT-3.5X-EN-00686
- "Asset Management" : ITEM ACT-3.5X-EN-00688
- "Procurement Management" : ITEM ACT-3.5X-EN-00690
- "Leasing Management" : ITEM ACT-3.5X-EN-00694
- "Cost Management" : ITEM ACT-3.5X-EN-00696
- "Administration and Advanced Use of AssetCenter" : ITEM ACT-3.5X-EN-00698

You will also find:

- A simplified table of contents, page 1.
- An detailed table of contents, page 5.
- An index, page 27.
- A glossary, page 49.

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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: <b>[Link.Link.Field]</b>
< >	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:

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

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## Send us your comments

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Any comments would be greatly appreciated.

Send any remarks to [documentation@peregrine.com](mailto:documentation@peregrine.com).

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In this index, each page number is preceded by a letter identifying the manual in which you will find the page:

I : "Introduction".

A : "Asset Management".

P : "Procurement Management".

L : "Leasing Management".

C : "Cost Management".

U : "Administration and Advanced Use of AssetCenter".

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# Glossary of terms

---

## A

### Acceptance

An asset is taken down, i.e. placed on a lease schedule, when it is "accepted" by the lessee. This acceptance is important for the following reasons:

- It marks the effective start of leasing and contractually binds the lessee to pay rent.
- It allows the leasing company to pay its vendor.

This acceptance takes the form of a formal document (Certificate of acceptance or Acceptance certificate) sent to the lessor by the lessee.

### Access restriction

An access restriction is one of the component parts of a user profile. It corresponds to a record filter on a table. For example, For example, you can make it possible for a technician to only have access to the assets in his own department, excluding all other departments. Access restrictions concern both reading and writing (append or modification) records.

### Action

An action is an operation which calls on a program directly executable from AssetCenter.

There are several types of action:

- Executable program,
- DDE operation,
- Sending a message,
- Executing a script,
- Printing a form or a report,
- Wizard.

Actions need to be predefined in order to be executed at any time by simply selecting them from a list.

## Alarms

Alarms can be programmed for fields which have the alarm icon {bmc zalarme.bmp} displayed to their right. Alarms launch actions in AssetCenter's table of actions.

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

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

A user 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 alarms with 2 levels, the triggering of the second level alarm depends on the action carried out at the first level.

- 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.

## Allocating expenses

The budget and cost center fields appear in several places in AssetCenter.

They allow you to allocate expenses to a budget and a cost center.

## Asset

"Assets" are at the heart of AssetCenter. An asset is an object that is listed in your inventory. It is not necessarily your property, because it may have been rented or leased.

Here are a few simple examples:

- CPUs.
- Printers
- Software licenses.
- Dumb terminals.
- The company's PBX system.

Assets can be organized in hierarchies: Sub-assets being attached to main assets.

For example:

- A complete workstation (CPU with keyboard, screen, printer, etc.)
- Standard office sets (desk, chair, filing cabinet, computer, telephone.)

AssetCenter lets you describe your assets in extensive detail.

## AssetCenter administrators

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

Several users may be database administrators. To do this, another administrator simply assigns administrator rights to that user in the "Profile" tab of the user's details.

## AssetCenter user

In order to be able to connect to an AssetCenter database, you must be an AssetCenter "user". 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 who have been assigned a Login and a password by the administrator.

A user is also assigned a user profile, unless the user has been granted administrative rights.

## **Asset level rent**

The user defines the overall rent amount at schedule level.

AssetCenter is capable of several different methods of calculating asset level rent. Depending on the option selected, asset level rents are calculated by prorating the schedule level rent amount by a reference value:

- main rent of the asset
- market value of the asset
- purchase price of the asset
- list price of the product corresponding to the asset
- purchase option value
- initial payment (interim rent) of the asset
- depreciated value of the asset
- residual value of the asset
- resale price of the asset

## **Assignee**

In order to finance the equipment, the lessor sometimes calls on a third party to whom he transfers his rights concerning the financial obligations of the lessee. This third party is usually a financial organization called an assignee. In general, a lessee will not be informed of this change of ownership. The assignee receives payments and the lessor keeps his contractual obligations.

---

# **B**

## **BASIC**

The version of BASIC used in AssetCenter is a sub-set developed by Cypress compatible with "Visual Basic for Applications<sup>TM</sup>". Please refer to

the BASIC documentation for additional information on this language, its structure and syntax.

Only certain "Visual Basic for Applications™" functions are supported, e.g.:

- File access functions are not supported.
- Limited support is provided for date and time functions, especially under UNIX.
- "Visual Basic pour Applications™" controls are not supported.

## **Budget**

"Budgets" in Cost Management are operating budgets which aim to help you track expenses (cash flows). They do not have a strict utilization in accounting terms. They allow you to manage projects such as "Investment projects" where the goal is to track and forecast expenses. Depreciation and current value accounting aspects are not dealt with.

Budgets let you group various kinds of expenses, related to the acquisition and maintenance of assets, employee training, the cost of maintenance, insurance or leasing contracts, etc.

Each "expense line" created in Cost Management is assigned to a given budget. This lets you obtain an immediate summary of the expenses for each budget. Budgets operate like a resource envelope.

Budgets have a number to help you reconcile them with other departments in the company.

## **Business day calendar**

A business day calendar describes the work and vacation periods for a given technical support team. Calendars are used to calculate deadlines to meet when processing helpdesk tickets by taking into account the work periods for the support team.

---

# C

## Category

Categories make it possible to group together products that have traits in common. In this way, it is possible to differentiate between microcomputer systems, minicomputer systems, peripheral devices, internal (in-house) training programs and external training programs, etc.

This allows you to structure the database.

Categories are also used by certain mechanisms. Example: When creating a product, the product inherits the features of the category to which it is associated and their values.

Categories are organized hierarchically.

## Cost center

Cost centers let you identify expense lines you want to group together. You should consider cost centers in a very general sense. "Cost centers" in Cost Management aim to help you track expenses (cash flows). They do not have a strict utilization in accounting terms.

Budgets let you group various kinds of expenses, related to the acquisition and maintenance of assets, employee training, the cost of maintenance, insurance or leasing contracts, etc.

When you create an expense line you can specify a cost center to allocate it to.

Each cost center has a number to help you reconcile them with data from other departments in the company.

AssetCenter manages cost center split operations.

## Calculated field

A calculated field is a field whose value is calculated according to the value of other fields and variables, using a user-defined formula. There are three types of calculated field:

- AQL

- BASIC
- Calculated field

Each of these types uses a different language for the calculation formulas and has an effect on the possibilities and constraints linked to using the field. For example, only "AQL" type calculated fields can be used in filters.

Calculated fields are virtual fields which are read-only (the formula alone is stored in the database).

You can define as many calculated fields as you like and assign user rights to them.

## Companies

AssetCenter lets you describe the 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.

## Context sensitive help

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, automatisms, 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 on the "Shift" and "F1" keys.
- Move to the field or link. Click on 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.

## Contract

AssetCenter lets you manage contracts signed with your partner companies (maintenance contracts, insurance contracts, etc.)

An asset can be associated with several contracts.

Contracts are organized hierarchically and are managed in a separate table.

## Control node

The controls of a page allow interaction with the user. You may define as many controls as you wish for a given page. AssetCenter fully manages the organization of controls within a page. You do not have to specify the positioning of each of the controls that you define.

"Control" type nodes are exclusively made up of a block of properties applicable to a defined control.

---

# D

## Data access notation

The BASIC syntax used in AssetCenter is similar to standard syntax, except for data access functions from the current record; this uses the following format:

```
[Link.Link.Field]
```

Example: **[Category.FullName]** from the table of products.

You can use the following syntax to recover the ID number of a link:  
**[Link.Link]**

When you want to refer to a link, you can use either the link's SQL name or the link's key name.

```
Example: RetVal=[Contact.Location] or RetVal=[Contact.lLocaId]
```

## Database

An AssetCenter database is a group of files containing all the information on the assets you are managing. For simple installations, these files are all located in the same directory, either on the local disk drive or on a network file server.

The program comes with a demonstration database.

AssetCenter allows you to create several databases. Users at a workstation can only open one database at a time. Several user workstations can be simultaneously connected to the same database. The program uses the transactional method to update data in the database. This method employs a sophisticated mechanism to manage updates and to ensure that they are carried out in a secure and optimized fashion.

### 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[ <Sep>]]]]]]]**

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 1900 to 1949.  
Numbers from 50 to 99 return 2050 to 2099.
- Use the "Ctrl" + ";" 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.

---

## 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 as a separator: / , ; 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 1900 to 1949.  
Numbers from 50 to 99 return 2050 to 2099.
- 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.

---

## DDE command

These are commands which are going to be sent to AssetCenter to be executed. These can be divided into four groups:

- Global commands, which do not require a table name or field name to be executed.
- Commands associated with a table, requiring the SQL name of a table as a parameter in order to be executed.
- Commands associated with a table and field or link, requiring the SQL name of a table and field or link as parameters in order to be executed.
- Commands associated with taking calls.

Commands belonging to these groups can be of two types:

- "Execute", which allows you to execute a task in AssetCenter.
- "Request", which allows you to ask AssetCenter for information.

## **DDE server**

DDE means "Dynamic Data Exchange" and designates dynamic data exchange mechanisms between Windows applications. In the case being described, DDE is used to execute AssetCenter commands from another application

## **DDE service**

In most cases, the "Service" is the name of the executable loaded in memory. In this case, i.e. when using AssetCenter as a DDE server, the service is "aam32". (If "aam32.exe" is the name of the executable.)

The program acting as DDE server must be launched in order for DDE mechanisms to work. In this case, AssetCenter must be loaded in memory.

## **DDE topic**

The topic allows you to define the context in which the action is to be executed. For AssetCenter, this topic is necessarily "AssetCenter".

## **Decision tree**

The decision tree allows you to analyze a situation step by step in order to find the most appropriate solution to the problem you encounter.

The tree is made up of questions, of possible answers and of corresponding solutions.

The problem types may point to an entry point in the decision tree. Thus, when the call is being taken, it is possible to be actively assisted in the resolution of the problem step by step once the problem type has been determined.

## **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.

## 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 to records in the majority of records in the AssetCenter database.

When a document given 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.

## 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 will 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" by "720 hours".

---

## E

### Early termination

On occasion, assets are sold to a third party, lost, stolen or destroyed. In general, the lessor is informed and this has an immediate impact on rent amounts (see the notion of loss value).

The lessee can, in certain cases, return the equipment before the end of term. This can take place at any time at the request of the lessee, or on dates determined by the contract. The lessee has to pay penalties called early termination fees.

### End of term

At the end of term, the lessee usually has several possibilities open to him: purchasing, returning or renewing the equipment.

### Error messages

When an operation cannot be performed or when a problem arises, AssetCenter displays an error message. The messages are sufficiently clear to let you understand what caused the problem and for this reason they are not documented here.

The error message window contains a {bmc uenregistrer.bmp} button which allows you to save the error message as a file.

Click on the "Save" button to save the error message in a file.

### Estimate

An estimate (or quote) is an itemized estimation of all or part of one or several purchase requests.

AssetCenter is very flexible in the way it handles estimates, since you can also split up one request into several estimates. You can also bring

together several requests or several items from different requests in the same estimate.

In this way, you can compare the different estimates you have created in AssetCenter, and create a purchase order from a selected estimate.

## Expense lines

Each expense line includes:

- a "debit" or a "credit".
- a "Purpose" (SQL Name:sePurpose) indicating the origin of the expense line (e.g. to purchase an asset).
- An item involved in the expense line, unless the expense line was created from the "Finance/ Expense lines" menu item.
- A "Status" (SQL Name:Status): the expense line may be: "Incurred", "Incurred and locked", "Projected". When the expense line is created automatically, this field is not set to "Incurred and locked". This allows you to control the expense lines created automatically, and only to validate the ones you choose.
- A "Cost center" (SQL Name:CostCenter) and a "Budget" (SQL Name:Budget).

To prepare a report of your incurred expenses:

- ↗ Display the list of expense lines.
- ↗ Optionally define filters to display only certain expense lines.
- ↗ Press the {bmc zcalc.bmp} button: the total amount of debits and credits for all expense lines in the list is displayed, after applying any filters you have defined.

---

# F

## 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 (numeric, 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.

## Finish node

A "Finish" node describes the final transition, that which leads to the final page of the wizard. It is a specific type of "Transition" node.

## 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 placed in position, it is very easy to access these records from the floor plan: just double-click on the item itself.

## Function

A function is a software item that performs operations and returns a value to the user. This value is called the "return value" or "return code".

Functions have the following structure:

```
Function <Function name> (<Parameter> As <Parameter type>[, ...,
<Parameter> As <Parameter type>]) As <Function type>

<Programm (script) executed by the function. This program must define
the return value.>

End Function
```

This structure applies to both built-in functions and programmable functions.

## Forms

A form is a document model that lets you print data.

Contrary to reports generated via Crystal Reports, forms are drawn-up directly in AssetCenter.

---

## H

### "Profile""Helpdesk/ Groups""Helpdesk/ Tickets"**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 maximum 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 "Western Region Sales" department has a sub-department called "Marketing". "Western Region Sales" is the "parent" or "parent department" of "Marketing".
- 

## I

## 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.)

To attach an image:

- Either double-click on 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".

Images are stored in the "sysblob" 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 except if you want to modify it at a later stage.

---

## Interim rent

Interim rent covers the period between receiving and accepting an asset and the date of the first rent payment on a full period.

For example, in the case of monthly rents due on the start of the month, if the equipment is installed on the 20<sup>th</sup> of the month, the 10 days between the 20<sup>th</sup> and the 1<sup>st</sup> may constitute 10 days of interim rent calculated "pro-rata temporis". The leasing agreement makes mention of the exact method of calculation.

The value of the interim rent is fixed at schedule level or at the level of each asset.

---

## L

### Lease schedule

The lease schedule is an application of the master lease. It inherits most of the information from the master lease and contains the list of equipment, the rent amounts and the main dates to be respected.

It is possible to create a lease schedule without having to create a master lease beforehand.

## **Loans**

Leasing agreements sometimes necessitate the borrowing of funds. Leasing Management allows you to describe the loan and to manage payments (principal, interest, fees).

## **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.

## **Loss value**

Lessees are usually liable to pay penalties in the case of lost or damaged assets, etc.

They depend on the value of the assets which are lost or destroyed. In general this "loss value" is defined contractually.

Leasing Management manages the different possible methods of loss value calculation, depending on the time elapsed since the start of term and the type of asset concerned.

## **Rent**

Defining a rent consists in determining the amount of periodic payments and the periodicity of payments.

Leasing Management allows you to calculate the overall rent amount for the contract, the rents of the assets subject to the contract, and the interim rent:

## **Lease Rate Factor (LRF)**

The reference price for each asset is multiplied by a lease rate factor and the values obtained are added up in order to define the overall rent amount for the contract.

The lease rate factor may vary according to type of equipment leased.

---

## **M**

### **Master lease**

The master lease defines the general terms and conditions for leasing equipment and the relations between the lessor and lessee.

It is used as the basis (or template) for the creation of lease schedules. Equipment and rent amounts are not defined on the master lease; this information is detailed on individual lease schedules.

---

## **N**

### **Notification**

Most agreements require the lessee to explicitly notify the lessor in advance of the chosen end of lease option for the equipment (renew, return, purchase). In general, if the lessor is not notified in advance the lessee may be liable to pay extra rent.

Leasing Management has the advantage of signaling in advance which assets are approaching end of term.

The lessee can create alarms at several levels which are triggered by the approach of certain dates: end of term, return, purchase or renewal dates of notification.

---

## O

### On-line help

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

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

---

## P

### Page node

A "Page" node describes a page in a wizard. It is made up of a block of properties applicable to this node and all its sub-nodes; and a set of sub-nodes that define objects defined in the page.

### Product

A product is a catalog reference, a model available on the market, with its features, its price, etc. It does not directly correspond to records of your assets (in the same way that a product in a mail order catalog only corresponds to one of your assets once you have received it).

Products are described by their "Nature" (SQL name: seNature) found at the top of a product detail):

- Standard hardware.
- Computer.
- Software license.
- Work order.
- Contract.
- Standard configuration.
- Training.
- Other.

Examples of products:

- Category: microcomputer, Brand: Peregrine, Model: Pentium II, Nature: Computer.
- Category: work order, Model: installation of a workstation, Nature: Work order.
- Category: contract, Model: Maintenance extended to 5 years, Nature: Contract.
- Category: license, Model: Select, Nature: Software license.

## Project

A project let you describe an operation concerning a group of assets and/or persons.

"Helpdesk/ Problem types"**Purchase option**

Most agreement stipulate that the lessor can or must buy the equipment at fair market value. This value is decided on between the lessor and lessee based on typical market prices for the type of equipment concerned.

---

# R

## Receiving slip

A receiving slip describes the receiving of one or several items that have been ordered.

This may satisfy the order in whole or in part. Several deliveries are often needed before a request is fully satisfied.

In the same way, delivery may be taken of part of an order, due to errors on the part of the supplier or a staggered delivery. For example, you order 20 PCs which your supplier delivers in batches of five. For this you would "take delivery in part".

## Recording the "Admin" login

There is a default administrator login called "Admin" in the Departments and employees table. This record cannot be deleted, for security reasons.

- When AssetCenter is first installed, this is the only login name that allows you to access the AssetCenter database for all administrative operations.
- This record is also the only solution when you cannot connect under a "Login" name that also has administrative rights.

## Request

A purchase request is one of the stages in the procurement cycle under AssetCenter.

It is made up of request composition lines. In general, composition lines reference products in AssetCenter. You specify what every request line should create and populate.

## Root node

The "Root" node describes the assistant as a whole. It is made up of a block of general properties that can be applied to all the wizard and series of sub-nodes that represent objects contained in the wizard.

---

# S

## Script

The word "script" is a generic name for a program written in a high level language. In AssetCenter, this notion includes three types of scripts:

- Procedural scripts which include:
  - ❖ Calculation scripts written in BASIC used to calculate the values of fields, condition the properties of objects in the AssetCenter database, etc.
  - ❖ BASIC scripts executing tasks, in particular in actions.

These BASIC programs can incorporate functions. This type of script is the subject of this chapter.

- Declarative scripts. These are import and export scripts that use their own scripting language, different from BASIC. This type of script is documented in full detail in the manuals entitled "Reference Guide: Administration and **Advanced Use**", **chapter "Importing data"** and "Reference Guide: Administration and **Advanced Use**", **"Exporting data and managing SQL views"**"Mixed", both declarative and procedural. This type of script is used in the wizards in AssetCenter.

## 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.

## Software counters

Software user rights are controlled by "software counters".

They count:

- the number of rights acquired for a selection of software licenses.
- the number of installations of a selection of software.

## Software installations

"Software installations" correspond to the installation of a software package on a computer.

There are various ways to create "software installations":

- By manually creating records in the table of software installations:
  - ❖ when you receive a pre-installed workstation,
  - ❖ when you install software manually on a workstation,
- By importing an inventory database using the gateway between the inventory tool and AssetCenter.

## Software licences

A "software license" corresponds to the right to use a software program granted by the publisher.

The concept of software licenses is used in the following tables:

- Categories

- Products
- Assets
- Contracts

For categories, products and assets, it is determined by the "Nature" field (SQL name: seNature) which may be set to "Software license". For contracts, this value is determined by the "Type" (SQL name: seType) field which may be set to "License".

## Start node

A "Start" node describes how the wizard is started. It is a specific type of "Transition" node.

## Supplier invoice

AssetCenter allows you to manage supplier invoices associated with orders.

An order line can be invoiced in whole or in part, due to errors made by the supplier, for example.

## Sub-tasks

Sub-tasks are work orders. They allow you to break work orders up into smaller elementary work order. All sub-tasks must be performed in order to perform the work order.

The sub-task of a work order can be performed sequentially or simultaneously.

---

# T

## 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.

Tabs sometimes contain sub-tabs.

To add, duplicate or remove a sub-tab, right click within the tab containing 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.

## Tax Formula

Tax formulas are formulas defined in order to calculate the amount of tax to apply.

An editor is at your disposal to help build these formulas from Basic scripts. For a given tax formula, you can define an unlimited number of different calculation formulas dependent on a context (a table in the database). Thus, for example, the tax formula "Sales tax" can have a different calculation formula depending on whether it is applied to purchase requests or delivery slips.

In practice, tax calculation formulas can be calculated using the Basic function "AmTaxRate()" which returns a tax rate according to a tax type, tax jurisdiction and given date:

```
RetVal = AmTaxRate()*mAmount
```

When the tax rate is not dependent on a tax jurisdiction, it is not necessary to use the "AmTaxRate()" function.

Two contextual variables are useful when writing tax formulas:

- "mAmount" which represents the pre-tax value on which the tax is calculated. According to the context, this variable can take the value of the asset-level rent, contract-level rent, the value of a request line or purchase order line, for example.f
- "dDate" which represents the date on which the tax is calculated. According to the context, this variable can take the value of the billing date, the payment date of an asset-level or contract level rent, etc.

The values of these variables are automatically set by AssetCenter according to the context of declaration of the tax.

Examples of valid tax formulas:

```
RetVal=mAmount*0.0655
```

This example applies a rate of 6.55% on the pre-tax total concerned.

```
RetVal=AmTaxRate("Sales tax", [lTaxJurisId], dDate,  
mAmount)*mAmount
```

This example applies a rate (calculated according to a tax type, jurisdiction and date) on the pre-tax total concerned.

## Tax jurisdictions

Tax jurisdictions provide the ability to combine locations, tax types, and tax rates. The tax jurisdictions detail screen allows you to carry out two operations, both of which are accessible via the "Rates" tab of a tax jurisdiction:

- View the tax rates applicable for a jurisdiction.
- Edit the tax rates of a jurisdiction.

By selecting the "Edit tax rates for this jurisdiction" option, you can add tax rates by clicking on the  button.

Tax jurisdictions are organized hierarchically. In general, the code of a tax jurisdiction corresponds to the ZIP code of the jurisdiction.

## Tax rate

For each "Tax type " applicable for a given jurisdiction, you define a list of tax "Rates" applicable from a given date.

To view the list of rates used by a tax type for a given location:

- Use the "Repository/Locations..." menu item to display the table of locations.
- Click on the  button to view the detail of the tax jurisdiction associated with the location.
- Select the option "View the tax rates applicable in this jurisdiction" in the "Rates" tab of the detail of the jurisdiction.
- This list displayed summarizes all the applicable tax rates for the tax types of the jurisdiction:

▲ Tax type	▼ Application date	▲ Rate
VAT	08/02/99	15%
Local	08/02/99	3%

In the above example, the sub-tab lists the applicable "Local" tax types for given location

## Tax type

A "Tax type" defines a tax to apply. For example: "Local tax".

The table of "Tax types" can be accessed in several ways:

- Via the "Tools/ List of screens" menu item.
- Via the "Tax type" link (SQL name: TaxType) in the table of tax rates of a tax jurisdiction.

### "Composition" **Toolbar**

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

The toolbar is fully customizable

## Transition node

A "Transition" node describes the passage between two pages in a wizard. It is exclusively made up of a block of properties.

---

# U

## 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 thanks to the database customization functions.

## User profile

A user profile is a set of user rights for given tables and fields and access restrictions which apply to records within these tables.

Profiles are attributed to users of AssetCenter.

For example, you can define:

- a "Helpdesk technician" profile, with access restricted to tables concerning the helpdesk.
- An "Accounting" profile, with access restricted to cost centers, budgets and expense lines only.

## User right

A user right is one of the component parts of a user profile. It concerns tables and fields in AssetCenter and not only certain records. As administrator, you can assign read/write rights (as with an operating system) to different database users which apply to the different tables in AssetCenter.

---

# V

## View

A view lets you memorize the display conditions for a list:

- The display mode: "Table view" or "Tree view"
- The display mode "Details only", "List only", or "List + Details"
- The sort conditions.
- The filter applied and the filter values.
- The list and the width of visible columns.
- The dimensions of the window.

This is 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.

---

## W

### Wizard

AssetCenter wizards are designed to help you carry out simple and systematic tasks. They offer graphic, user-friendly, step by step guidance through the different phases necessary to carry out a task. AssetCenter ships with several predefined wizards that make it possible, amongst other things, to:

- Move users and assets from one location to another. You select a user (employee), the corresponding assigned assets and the new location. The wizard takes this information and updates the location of the assets and their user.
- Simply manage stocks. The user selects the assets in stock, an employee and a location. The wizard assigns the assets to the selected employee and location.
- Simply gather information in order to perform any given action.
- Facilitate the entering of records.

---

In addition to the wizards provided with AssetCenter, you can create your own.

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### Workflow

Workflow is concerned with the formalization and/or automation of business procedures.

For example, the following processes can be modeled and automated using workflow methods:

- Purchase request approval procedures.
- Asset moves.
- etc.

AssetCenter makes it possible for you to define workflow schemes and manages their implementation.

## **Workflow activity**

A workflow consists in:

- A task to be executed. This task may necessitate user interaction or be carried out automatically by AssetCenter Server.
- Events that trigger transitions to other activities.

Workflow activities are stored in the table of workflow activities (SQL name "amWfActivity").

## **Workflow activity assignee**

Assignees are appointed to perform tasks resulting from "Question" or "User action" type workflow activities". Assignees are not involved in "Automatic action" or "Test/ Script" type activities.

## **Workflow event**

Workflow events results from activities. They in turn make it possible to activate transitions which trigger other activities.

Events belonging to a workflow scheme are stored in the table of workflow events with SQL name "amWfEvent".

When these events occur, they be recorded in the table in the table of workflow events with SQL name "amWfOccurEvent".

## **Workflow instance**

A "Workflow instance" refers to a defined workflow scheme which is being executed.

## **Workflow task**

A workflow task is an assigned task to be carried out, resulting from the triggering of an activity.

In order for workflow tasks to be recorded in the table of workflow tasks with SQL name "amWfWorkItem", the "Log task" option, in the "General" tab of the activity detail must be checked.

## Workflow transition

A workflow transition makes it possible to go from one activity to another. They are triggered following an event.

An event can be associated with several transitions.

Transitions belonging to a workflow scheme are stored in the table of workflow transitions with SQL name "amWfTransition".

## Workflow scheme

Creating a workflow scheme in AssetCenter consists in defining:

- Activities.
- Events resulting from activities which make it possible to activate transitions.
- Transitions which trigger activities.
- A context.
- Time limits and alarms.

## Work order

A work order is an operation carried out on an asset to solve a problem. This may be a repair, user assistance, installation, move, etc.

Work order are described hierarchically (as a tree of work orders or sub-tasks). You can assign as many sub-tasks to a work order as you like. A work order can be based on a template defined in the "Product" (SQL Name:Product). This template describes a generic work order or a standard work order procedure. The information defined in a work order is inherited in the work order detail.





