Peregrine

AssetCenter
Catalog

Peregrine
SYSTEMS

This edition applies to version 4.0.0 of the licensed program

AssetCenter

Catalog

Table of Contents

List of Figures

List of Tables

1 Contents of the Catalog Guide

CHAPTER

This reference guide is divided into several distinct chapters:

- Principles of catalog management

  This chapter deals with this module's intended audience, key concepts and the typical cases that apply to this module.

- Creating a catalog (Sample scenario)

  This chapter contains a sample scenario, outlining the different steps necessary to create a catalog.

- Interface layout

  This chapter lists and explains the different screens involved in the catalog module.

- Glossary

  The glossary lists and defines the key terms used in the catalog module.

2 Principles of catalog management

The catalog module of AssetCenter was developed to facilitate procurement management. This module relies on the individualized management of products, catalogs and catalog references.

In AssetCenter, the management of your catalogs enables you to:

- Centralize your purchases.
- Track your suppliers and catalog references.
- Standardize product selections for purchase.

Aspects of the catalog module

Figure 2.1. The AssetCenter Catalog and Portfolio modules
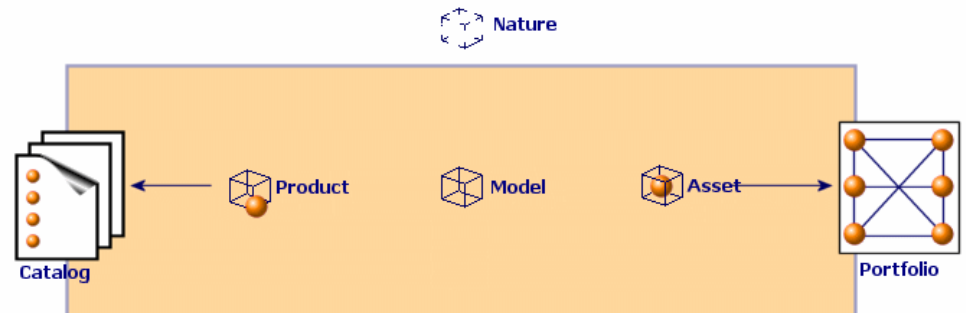
The catalog module, in relation with the Procurement module, facilitates acquisitions linked to the following systems of management:

- Management of the IT portfolio.
- Management of raw materials, bulk goods, office supplies and furniture.
- Management of Maintenance, Repair and Operations (MRO).
- Service management: contracts, work orders, projects, etc.
- Management of your main assets.

The catalog module of AssetCenter version 4.0 fits the needs of different people in the various steps of the catalog-using chain, whether they are the vendor or the buyer.

In AssetCenter:

- Managing a catalog implies only the management of its products and their associated references.
- Managing procurements implies purchasing catalog references.

- Managing a company's portfolio means receiving references and transforming them into items in the portfolio.

Catalogs can be defined according to how they are intended to be used:

- My company sells products and produces a catalog in which they are referenced.

  The catalog administrator distributes the catalogs to purchasers, product managers and marketing managers.

- My company buys products from suppliers.

  The catalog administrator distributes the catalogs to purchasers, those in charge of receiving goods, infrastructure managers, and IT maintenance managers, as well as all those making purchase requests in AssetCenter.

  The procurement manager manages the catalogs, and deals with suppliers.

Once you have defined how you will use the catalog, you need to then determine its management parameters:

- The structure of a catalog is managed by the administrator. The structure enables, for example, the creation of standard configurations.
- The tool enabling catalog-reference research and consultation is mainly used by those employees having access to this functionality, as well as by the purchase manager.

AssetCenter

Key terms

Appearance of the catalog
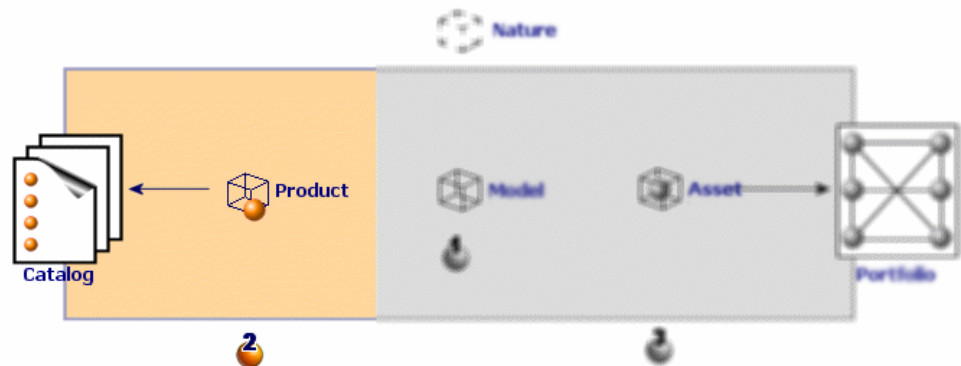
In AssetCenter, a catalog is organized and represented hierarchically. There are several different types of such an organization from which you can choose: Products can be classified by category, by brand, by price range, etc. The demonstration database provided with AssetCenter 4.0 organizes the catalog by product family. Each product corresponds to one or more catalog references, which is independent of your catalog organization.

Note: With AssetCenter, you to use the UN/SPSC international standard to create your product catalogs and their hierarchical organizations.

At the beginning of your acquisition cycle, the catalog will differ from what is really in your portfolio. Creating new models, while receiving the catalog references that you ordered, will enable the catalog to correspond to the items in your portfolio. You should make a difference

between an internal catalog, which relies on the models in your portfolio, and an external catalog that uses, for example, the UN/SPSC standard.

Models

Models enable you to define the manner in which an item will be created in relation with a product in AssetCenter.

Catalog products

A product is an object that only exists in a catalog. It does not correspond directly to any items in your portfolio.

The products in your catalogs generally correspond to the models that your employees can request for purchase. If a product that you want to buy does not exist among the models in your company, AssetCenter enables you to create it automatically. For more information on models, see the "Models" section of the "Principles of portfolio management" chapter in the "Portfolio management" guide.

When you receive a product, a portfolio item is created, and it relies on a model to do so. When a product's purchase request is based on a model, this model is used to transform your product into a portfolio item.

In AssetCenter, several models are available:

- Consumables
- Assets
- Cables
- Contracts
- Training sessions
- Work orders

Supplier package (bundle)

A supplier package corresponds to a set of products that the supplier can provide you as a standard package.

In order to facilitate the simultaneous creation of several records in the database, AssetCenter lets you create bundles of products.

Figure 2.2. Supplier package
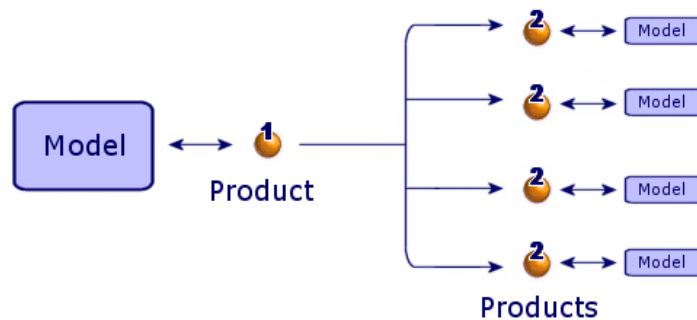
A supplier package links one or more products (2) to a parent product (1). This product does relies on a model, as do all of its component products.

Example: In a Compaq package, the CPU is the parent product whose components are a keyboard, a mouse and a screen.

When you acquire this product via the procurement cycle, the CPU asset is created with the mouse, keyboard and screen,.

Quantities and supplier packages

You might find yourself in a situation where you need to create a supplier package composed of a non-uniform quantity of items.

For example, you decide to order three computers with which are associated four printers.

In this case, you need to create a product called "Bundle", for example, whose composition is three computers and four printers, and whose model's nature creates nothing.

Figure 2.3. Quantities in a supplier package
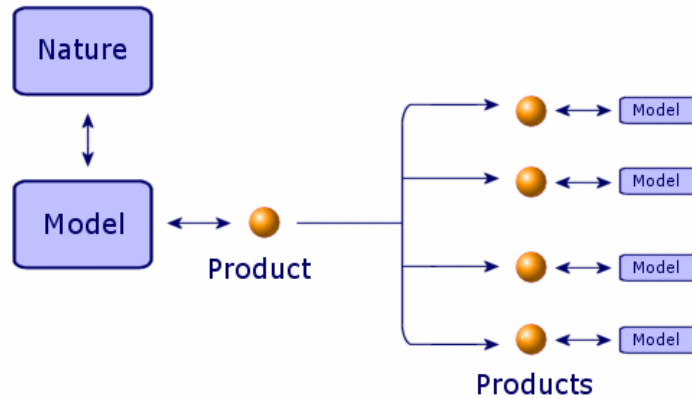
Reconciling measurement units between a product and its model

In AssetCenter, you can manage a portfolio item in one measurement unit and order items in another.

Figure 2.4. Units
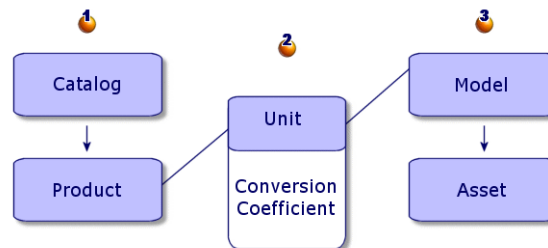
The management of measurement units is done at the product level (1) and the model level (3) of your portfolio. The reconciliation between these two units is done using a conversion coefficient (2).

Refer to the "Managing a product's measurement unit" section of this guide, as well as the "Units used in batches" section of the "Portfolio management" guide for this function's detail.

Catalog references

A catalog reference ties a product to a catalog. Furthermore, a product can be tied to one or more catalogs. This association includes the creation of a reference and the assignment of a price. You will have as many catalog references as you have associations of products to catalogs.

For example, the IntelliMouse product is associated with the VPC Direct catalog and has the reference VPC020125540. Its price is 5 dollars.

This graphic illustrates the logical link between a product, a catalog reference and a catalog:

Figure 2.5. Links between products, catalog references and catalogs
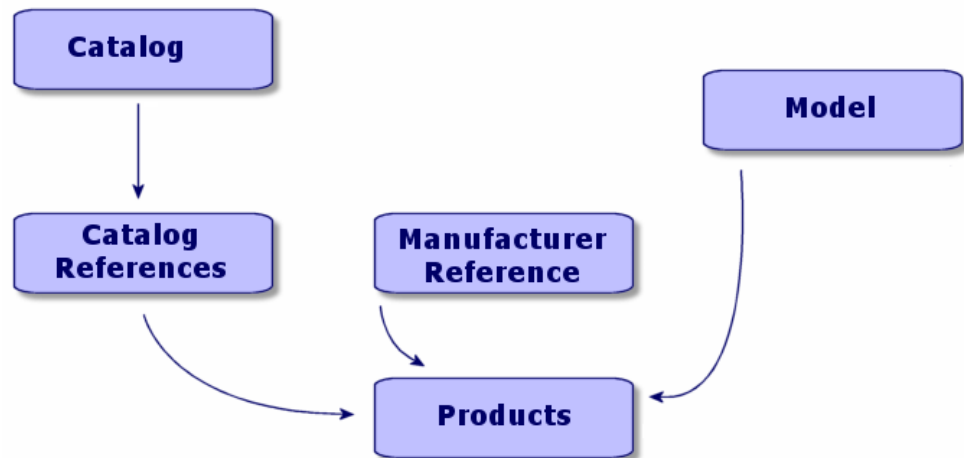
The price or the catalog reference number can be customized by using a calculation script and adding formatted data. Refer to the "Example scenario: creating a catalog" chapter in this guide for more information on the customization of a catalog reference.

It is also possible to classify your catalog references according to the standard of your choice.

Catalog management (example)

Prerequisite

It is essential for any company to have data that is regularly updated in order to optimize its procurement management.

Before importing external data, you should be able to answer the following questions:

- Does my company have the IT competency required to import catalog data?
- Will my IT structure support the import of one or more catalogs, or tens of thousands of records?
- Will my company need to hire an outside contractor specialized in catalog production in order to import this data, or can I enter it myself into the AssetCenter database?
- What is the catalog data format (text, XML, ASCII, etc.)?
- What kind of data should I import? Do I need to import the entire catalog and all its information or just certain parts?
- How will I manage this data? Will this data concern my catalog management, my procurement management or the management of my entire portfolio?

Scenario 1: Importing catalog data into AssetCenter

In AssetCenter, you can integrate external data and update your catalog(s) dynamically:

Or by using Peregrine Systems' Connect-It application. This EAI application enables you to process external data and integrate it into your AssetCenter database.

Importing data with Connect-It

There are multiple catalog data sources, and they do not all use the same standards and medias:

- The international UN/SPSC standard, a classification standard specific to the supplier, etc.
- Paper, CDR, FTP, e-mail, etc.
- XML or text file, Microsoft Excel file, Microsoft Access database, or other databases.

Depending on these parameters, a data import scenario should be provided by each catalog provider.

Importing catalog data in your AssetCenter database is made possible by Connect-It and this application's **XML**, **text**, mail and **database** connectors.

You can obtain an example scenario of a data migration from an online catalog from Peregrine Systems customer support.

Scenario 2: Organizing and distributing catalogs

In AssetCenter, you can determine which catalogs can be viewed by which of your company's branches.

The **Customers** tab in the detail of a catalog enables you to list all the companies that have access to a given catalog.

Scenario 3: Hierarchy of a catalog

Catalog products are organized hierarchically in AssetCenter, and their references can be classified.

This section presents the organization of a catalog and the best way to use it.

Before creating anything, you need to think about for whom this catalog is created and how it will be used in AssetCenter. Then, you need to be able to answer the following questions:

- What hierarchical system will I use: classification by brand, by use, by product, by reference, etc.?
- Will my catalog need a precise hierarchy or a general one?
- Is the data in my catalog purely for consultation purposes or will I use it in AssetCenter as part of my procurement cycle?

Defining a hierarchy for your catalog

You can determine how you want to classify your catalog references with AssetCenter. To do this, you need to populate the Product classification codes table (amProdClassCode) with the standards you use to manage your catalog.

This classification enables you to better decipher the information in your catalogs according to the standards you have in place. You can only use one standard per catalog, however.

For example, you can choose to use the UN/SPSC standard and view your catalogs according to the standard there within.

Using catalog data in AssetCenter

If you choose to use catalog data in AssetCenter, it is assumed that you are going to use this data in your procurement cycle.

In AssetCenter, you order items mainly through the use of catalog references. Purchasing these references will create new items in your portfolio, which are linked to your catalog references by a model.

In fact, for every created portfolio item there exists, via its model, a corresponding catalog reference.

Impact of the catalog on your portfolio

You can choose to manage your portfolio using any given catalog.

To do this, you should choose the creation of models according to the classification standard established for your catalog.

3 Creating a catalog (example scenario)

CHAPTER

The publication of a catalog enables the vendor's customers to simplify their procurement management. This publication presumes that your data is automatically updated and that it's arranged in a logical, tree-like structure.

The following example is taken from the viewpoint of the vendor, Hardware Inc. It illustrates how products, catalog references and catalogs are created.

> **Note:** The catalogs, catalog references and products are associated with two linked tables: the Brands table and the Suppliers table (amBrand and amSupplier). These tables must be populated in order to carry out the examples.

To perform our example scenario, we recommend that you connect to the demonstration database (provided with AssetCenter) as an administrator.

Creating a product

Hardware Inc., specializing in IT-hardware sales, created different products for its catalog.

The products will then be referenced in a catalog that you would have already created.

Creating a product

To create a computer-type product (a Macintosh G4):

1 Open the Products table via the **Procurement/Products** menu.
2 Click **New**.
3 Populate the **Description** field and **Brand** field.

   If you use the catalog to order a product (not just to consult it), you need to specify the Macintosh G4 in the **General** tab.

4 Validate by clicking **Create**.

Manage a product's options

AssetCenter enables you to manage the options associated with a catalog product.

In AssetCenter, a product can have an option value. You can link as many options to a product as you want.

This is a double-functionality. First of all, it enables you to categorize into a hierarchy the products associated with a supplier package. Secondly, it enables you to choose from among different product options while placing an order.

Each product option is associated with a group of options, and there can only be one default option per option group. An option group can either be mandatory or not.

For example, when you buy a car, you can choose between a tape player (the standard default option) or a CD player, which is not the default option and for which you generally have to pay extra.

Figure 3.1. Logical structure of an option
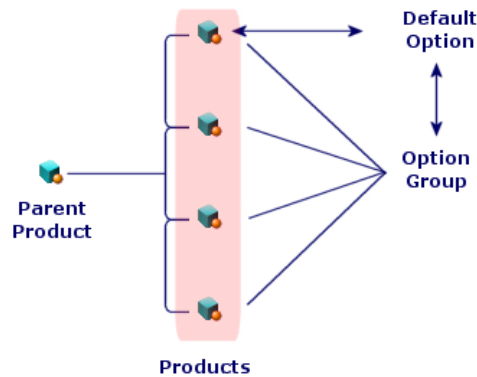
Creating an option group

To create an option group:

1 Display the list of product options (**Tools/ List of screens**).
2 Click **New**.
3 Populate the **Name** field.

   Example: **Mouse**
4 Select **Mandatory choice**.

   This makes it mandatory to select an option from this group when a purchase request concerns a parent product.

Associating options to an option group

To associate options to an option group:

1 Display the list of products (**Procurement/ Products**).
2 Select a product that is an option.

   Example: Intellimouse mouse device.
3 In the **General** tab, select **Is an option**.
4 Populate or select the **Option group** link.

   Example: Select the **Mouse** link.

5 Click **Modify**.

Example of option management

Our example concerns the management of two option groups for the DeskPro 4000S product:

- The **Mouse** option group (choose between a standard mouse or the infrared mouse).
- The **CD recorder** option group (choose between an 8x or 16x CD recorder).

Let's have a closer look at the optional feature of two mouse devices associated with a computer:

- Select the IntelliMouse product.

  This product is a default option of its parent product, the Deskpro 4000S: The **Optional** box is checked as well as the **Default option** box. This product belongs to the **Mouse Option group**.
- Select the Infrared Mouse product.

  This product is an option of its parent product, the Deskpro 4000S: the **Optional** box is checked, and this product belongs to the **Mouse Option group**.

These two optional products belong to the same option group. One of them is the default option, the other is an option that will cost money.

Note: It is not mandatory, however, to define a default option for an option group, unless that option group is mandatory.

Creating a supplier package (bundle)

For example, to create the **Compaq Deskpro 4000S** supplier package, composed of a computer, a printer and a scanner, you need to perform the following steps:

1 Open the Products table via the **Procurement/Products** menu.
2 Now create the products composing the supplier package:

1 Create the Deskpro 4000S product (the actual product, not the bundle):

- Click **New**.
- Populate the **Description** and **Brand** fields.
- Validate by clicking **Create**.

2 Create the LaserJet2100 Printer product:

- Click **New**.
- Populate the **Description** field with 'Laserjet 2100', as well as the **Brand** field.
- Populate the **Component of** field with Deskpro 4000S Bundle.
- Validate by clicking **Create**.

3 Create the "Agfa DuoScan Hid scanner" product.

The creation process is identical to the one for the printer.

You just created a supplier package whose parent item is the DeskPro 4000S computer, composed of a printer and a scanner.

Quantities and supplier packages

You might find yourself in a situation where you need to create a supplier package composed of a non-uniform quantity of items.

Refer to the section Quantities and supplier packages of the chapter Principles of catalog management.

Managing a product's measurement unit

AssetCenter enables you to manage a catalog product in one unit of measurement and to manage it in another unit of measurement as an asset in your portfolio.

The reconciliation between these two units is performed using the conversion coefficient defined for a product.

For more information, refer to the "Units used for batch management" section, "General principals of portfolio management" chapter of the "Portfolio management" guide.

Determining a measurement unit for a portfolio item

The measurement unit of a portfolio item is determined in its model.

To determine the unit of a model, its nature must:

- Enable you to create an item in your portfolio.
- Have a management constraint of **Asset tag** or **None**.

To define a unit of a portfolio item, populate the **Unit used** field with the measurement unit of your choice (liter, ton, etc.).

Determining a measurement unit for a product

To define a unit of measurement:

- Select a product.
- In the **Acquisition** tab, populate the **Purchase unit** field with a unit of measurement (liter, ton, etc.).
- Validate.

Defining a conversion coefficient

The conversion coefficient enables you to specify the relation between the measurement unit in which you purchase a product and the unit in which you use the product once it joins your portfolio.

The unit of this coefficient is the one that you defined for the model which you specified in the **General** tab of a model's detail.

The **Conv. coeff** field is automatically populated when you populate the **Purchase unit** field. If this is not the case, you need to manually populate it with the value that converts the purchase unit to the unit in which you use the product.

Managing a product's packaging

With AssetCenter, you can specify whether a product is sold as a packaged product. This specification impacts how a portfolio item is created when you receive the ordered product.

Whether a product is sold in a package or not determines how it is processed for sale.

If you have not defined a unit of measurement, you need to indicate the number of items in which the product is sold. For example, the Screen cleaner product comes in sets of six items (six bottles of cleaner in a box).

If you defined a unit of measurement, you need to indicate not only how many items make up the product, but also the reference quantity of each item (six bottles of screen cleaner; one liter per bottle).

Caution:

Choosing this option (sold packaged) and a measurement unit will modify the behavior of the procurement cycle, and it implies that you will manage your portfolio items differently from your products.

For example, if the product comes in a package of six bottles, requesting this product will lead to ordering six bottles.

For example, you can buy cement by the ton and manage it by sacks of 50 pounds.

To define a package for the Screen cleaner product, perform the following steps:

1 Create the Screen cleaner product.
2 Populate the **Purchase unit** field, in the **Acquisition** tab, with the unit of measurement **Liter**.
3 Select **Is packaged** in the **Acquis.** tab.
4 Populate the **Number of items** field with the value **6**.
5 Populate the **Quantity per item** field with the value **1**.

This example implies that you manage items in your portfolio that have a packaged unit different from the unit in which you use (and manage) the item in the portfolio.

Creating a catalog

Catalogs in AssetCenter regroup the product references. You need to create the catalogs before putting the product references inside of them.

Figure 3.2. Overview of how the catalog works
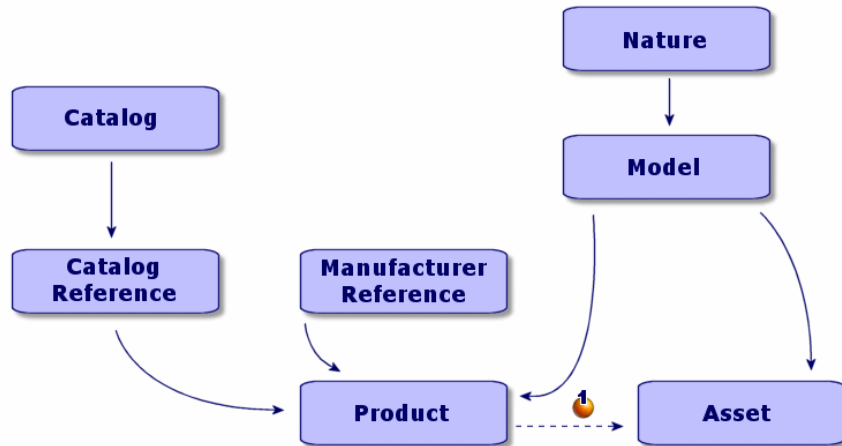
Creating a catalog

To create a catalog, you must first populate the **General** tab of a catalog detail, then choose a default supplier associated with the catalog.

Populating the General tab

- Open the Catalogs table via the **Procurement/Catalogs** menu.
- Click **New.**
- Populate the mandatory fields **Name** and **Currency**. You can populate the optional fields if you want as well.
- Click **Create.**

Populating the Suppliers tab

This tab lists the suppliers associated with the catalog and must contain at least one supplier in order to be included in the procurement cycle (1).

Add the supplier(s) associated with the catalog in this tab and populate the **Default supplier** field if necessary.

Creating catalog references

Associating a product to a catalog determines the catalog reference.

In this example, we use the catalogs in the demonstration database provided with AssetCenter 4.0.

To create a catalog reference:

- First method

    1 Open the catalog screen.
    2 Select the desired catalog: Computinfo 2002.
    3 In the **References** tab, click ⊞ to associate a product to the selected catalog.
    4 In the window that appears, select the product that you want to add using either the drop-down list or the shortcut link.
    5 Populate the mandatory **Reference** field.

       The catalog reference field is automatically populated with the product name. You can modify this name if necessary.
    6 If necessary, populate or modify the optional fields (**Price**, **Start of validity**, **End of validity**, **Certification**, etc.).
    7 Click **Add** to validate or **Add (multiple)** to create several catalog references of the same type.

- Second method:

    1 Open the catalog reference screen.
    2 Click **New**.
    3 Select the product to reference.
    4 Populate the mandatory **catalog** and **catalog reference** fields.

       The **catalog** field references the catalog with which the product is associated.

       The **catalog reference** field is automatically populated with the product name. You can modify this name if necessary.
    5 If necessary, populate or modify the optional fields: **Price**, **Start of validity**, **End of validity**, **Certification**, etc.

6 Click **Add** to validate or **Add (multiple)** to create several catalog references of the same type.

Additional specifications of catalog references

Additional specifications enable you to calculate a price or a catalog reference using customizations. These customizations are essentially calculation scripts that are associated with additional data.

Calculating a catalog price

To calculate a catalog price, the **Additional formatted data** field is populated with certain values. These values are processed by a script, which calculates the price according to the selected quantity.

When you order this reference, the price will vary depending on the quantity you choose.

Calculating a catalog reference and a price associated with selection criteria

To calculate a price and a catalog reference according to certain criteria, you need to populate the **Additional formatted data** field with certain values. These values are processed by a script, which calculates the catalog reference and the price according to several criteria (the color and the size, for example).

When you order this reference, the price will vary depending on the color and size you choose.

Classification standard

You can determine which classification standard a catalog should use.

Generally, the fields indicating this standard (or system of classification) will be automatically populated by the Connect-It EAI, which enables you to recover external catalog data with which to populate your AssetCenter database.

UN/SPSC standard

The UN/SPSC standard (**U**nited **N**ations/**S**tandard **P**roduct and **S**ervices **C**lassification) is the international standard of classification of product categories and services.

This classification standard is organizing according to four levels:

Table 3.1. Example of UN/SPSC classification

UN/SPSC level	UN/SPSC code	UN/SPSC description
2 numbers	**43**000000	Communication, IT equipment, peripherals (devices), components
2 numbers	**4317**0000	Hardware
6 numbers	**431722**00	Input peripheral (device)
8 numbers	**43172205**	Computer mouse

Managing your catalogs according to this standard enables you to:

- Automatically bring together several product/services catalogs.
- Reorganize your products or services.
- View acquired items or services according to their different levels.
- Facilitate your online purchasing steps.

Establishing a classification standard

Three steps are necessary to establish a classification standard:

1 Defining a standard of classification

- Open the Classifications table (nom SQL : amProdClassCode) via the **Procurement/Classifications** menu item.
- Populate the **Classification** field.

  You can decide to use, for example, the UN/SPSC standard.
- A dialog box appears asking you if you want to add this value to your itemized list. Click **Yes**.
- Populate the **Code** field.

  Enter, for example, the code 0000001.
- Populate the **Label** field if necessary.
- Click **Add (multiple)**.

- Repeat this same operation for the next code and populate the **Parent item** if the second code is a sub-code of the first.

  For example, you can specify that the code 0000010 is the sub-code of 0000001.

- Repeat this operation as many times as necessary to create your set of classifications.

2 Once you have finished defining your classification, you need to populate your catalog with the classification standard that you are using: Populate the **Classification** field in the catalog's detail with the name of the standard you just entered in the Classifications table.

3 All you need to do now is populate your catalog references with the codes you previously entered.

- Select a catalog reference.

  For example, select the catalog reference R01-01.

- Populate the **Classification code** field by selecting one of the values from the drop-down list.

  For example, use the code 0000001.

- Click **Modify**.

- Repeat this operation for each catalog reference you need to classify.

  If you want to link your catalog references to a given model, populate the model field with its equivalent catalog in the list of classification codes (**Procurement/Classifications**).

Note: This method is only really useful if you have just a few catalog items to classify. If you import large amounts of catalog data and want to use a given classification standard, you should use a Connect-It scenario or contact Peregrine Systems customer support.

Using a catalog in the procurement cycle

The catalog comes into play at two different moments in the procurement cycle: in the purchase request and in the purchase order composition.

The purchase request is normally based upon the model. It is, nevertheless, possible to base a purchase request on a catalog reference. This function will be further developed in the first part of this section.

A purchase order is normally based on a catalog product reference. We will look more closely at the different types of orders in the second part of this section.

The catalog in a purchase request

For all general information concerning purchase requests, refer to the AssetCenter 4.0 "Procurements" guide.

To access a catalog reference in a purchase request:

1   Create a new purchase request.
2   Add a purchase request line in the **Composition** tab.
3   You can access the catalog references using the **Reference** field in the new screen that appears.
4   Click **Add** or **Add (multiple)** to add additional catalog references.

Each purchase order is associated with a specific supplier. It is thus not possible to have two different suppliers in one order.

The catalog in a purchase order

For all general information concerning purchase orders, refer to the AssetCenter 4.0 "Procurements" guide.

The purchase order can be made from a validated request, but it is not necessary. Both cases are discussed in this section.

The catalog in a purchase-order wizard

In AssetCenter, it is possible to launch a purchase-order wizard to order a product directly from a validated request.

To access a catalog reference in a wizard:

1 Select your validated request and launch the wizard by clicking **Order**.
2 Select the **Specify the catalog or the provider** option.
3 Select the search type you want to use for the catalogs: by catalog name or by supplier name.

   • If you perform a search by supplier, AssetCenter will search for all the suppliers, in the Companies table (amCompany), who are associated with the selected model.
   • If you perform a search by catalog, AssetCenter will search for all the catalogs, in the Catalogs table (amCatalog), which are associated with the selected model. You can choose to restrict your search to the catalog's default supplier if you wish (**Take default supplier** option).

4 Select the supplier or the catalog associated with the request and click **Next**.

Order not associated with a request

The procurement-cycle constraints make it so it's impossible to order and receive an item, which needs to be created in the database, if you do not have the original request with which it is associated.

Nevertheless, you are not obliged to make a purchase request before ordering a product. Placing an order can be done directly with a catalog reference.

When you place an order with the supplier:

• If an ordered item has an associated model, you need to create a request corresponding to this model.
• If no models are associated with the order, then you can go ahead and place the order, but the reception will not create any assets in the database.

To access a catalog reference in an order:

- Create your purchase order.
- In the **Composition** tab, add a new purchase order line.
- You can access the catalog references using the **Reference** field in the new screen that appears.
- Click **Add** or **Add (multiple)** to add additional catalog references.

Each purchase order is associated with a specific supplier. It is thus not possible to have two different suppliers in one order.

Creating a supplier package (bundle)

A supplier package is the association of several products to a catalog reference.

Each of these products has a different catalog reference.

Creating catalog options

The ordering wizard can order options that are associated by default with a product.

If you want to choose an option that is not the default option, you need to create an extra request and order line.

Receiving an order

When you create a purchase request or a purchase order, you are creating composition lines for that request or order.

Each purchase-order composition line creates an item in the portfolio once that order is received.

If the order does not have a corresponding model in the portfolio, AssetCenter proposes that you create one. Refer to the "Portfolio management" guide for all the information linked to the creation of a model.

If you are using the UN/SPSC standard (United Nations Standard Products and Services Codes), AssetCenter will create models associated with the purchase order according to this international standard.

4 Reference

Configuration

The catalog is only available if you have activated the Procurement module.

Interface layout

To access the list of catalogs, perform one of the following actions:

- Select **Procurement/ Catalogs**.
- Click in the toolbar.

To access the list of catalog references, perform on the following actions:

- Select **Procurement/ References**.
- Click in the toolbar.

To access the list of products, perform one of the following actions:

- Select **Procurement/ Products**.

- Click ⬚ in the toolbar.

Tabs common to all screens

The catalog, catalog reference and product screens all have certain tabs in common.

History tab

For a complete description of this tab, refer to the "General interface" guide.

Documents tab

This tab enables you to specify which document(s) you want to associate to a catalog.

To associate a document to a catalog:

- Populate the **File** field with the path to your file, or click the **Folder** icon.
- The **Designation** and **Date** fields are automatically populated.
- You can populate the **Category** field with the category to which the document belongs (invoice, contract, etc.).
- Populate the **Remarks** field if necessary.

Catalog screen

For each catalog selected or created, two mandatory fields and one optional field should be populated:

- The **Name** field: name of the catalog.
- The **Currency** field: currency used for this catalog.
- The **Description** field: description of the catalog.

There is no hierarchical presentation of these catalogs.

The detail of a catalog line is composed of seven tabs:

- General

- References
- Customers
- Suppliers
- Customizations
- History
- Documents

The General tab

This tab contains the following information:

- **Start of validity**: the date on which this catalog becomes valid in accordance with the supplier.
- **End of validity**: the date on which this catalog becomes invalid in accordance with the supplier.
- **Source**: this catalog's data source (mail, FTP, etc.).
- **Last reconciliation**: date-type field corresponding to the catalog's last update by an external procedure.
- **Classification**: type of classification used for the catalog references.
- **Asset**: AssetCenter's asset tag for the catalog.
- **External**: a check box that can validate (or not) that the catalog is an external data source (FTP, CDROM, etc.).
- **URL**: URL address of the catalog.
- **Contract**: contract associated with a catalog.
- **Supervisor**: person in charge of this catalog.
- **Contact**: contact associated with this catalog.
- **Location**: location of the catalog. This field is entirely customizable.

  For example, the location can define what regions can use the catalog: Asia, North America, Europe, worldwide, etc.
- **Remarks**: open remarks associated with the catalog.

The References tab

This tab lists the catalog references.

The Customers tab

This tab helps you manage several companies at once. It lists all the client companies of a parent company and, using the appropriate scripts, authorizes or denies access to catalogs according to the rights these companies have.

The Suppliers tab

This tab lists the supplier(s) of the same catalog. In the case where several suppliers are listed, you can specify which supplier you want as your default supplier in the **Default supplier** field.

The Customizations tab

This tab takes information from the additional formatted data listed in the **Customizations** tab of the **Catalog references** screen.

The Catalog references screen

This screen lists the references from all your catalogs. These references can be categorized.

Each reference selected is detailed in the following tabs:

* General
* Customizations
* History
* Documents

Each reference created or selected is populated in the two mandatory fields that follow:

* **Catalog**: catalog to which the catalog reference is attached.
* **Reference**: reference number of the catalog.

General tab

This tab regroups the main information attached to a catalog reference.

* **Product**: product associated with the catalog reference. This can be one product or a set of products.

- **Description**: description of the catalog reference. Enter your product's description in this field, which is entirely editable.
- **Classification code**: code associated with the catalog reference that enables it to be classified according to a given standard. This field must respect the following syntax:

```
classification, number
```

For example:

```
UNSPSC, 01234567
```

- **Start of validity**: the date on which this catalog becomes valid in accordance with the supplier.
- **End of validity**: the date on which this catalog becomes invalid in accordance with the supplier.
- **Price**: product's price.
- **Update date**: date of the last update made to this catalog reference.
- **Discount**: discount on the price of the product reference.
- **Min. Qty.**: minimum quantity that can be purchased.
- **Qty avail**: quantity available in stock.
- **Certification**: itemized list populated by the employee who manages the catalog. This field enables that person to set a degree of certification required for a given catalog.
- **Delivery time**
- **Remarks**: open remarks associated with the catalog reference.

The Customizations tab

This tab regroups all the customizations made to the calculation of a catalog reference's price.

These customizations are essentially calculation scripts associated with additional formatted data.

- The **Script (price)** field is a link to the calculation script of a catalog reference's price.
- The **Script (reference)** field is a link to the calculation script of a catalog reference.

- The **Additional formatted data** contains data that can be used by the two previous scripts.

Note: These calculation scripts are used in the procurement procedure. In absence of these scripts, the values in the Price and Discount fields of the General tab will be used.

The Catalog products screen

This screen lists, in a hierarchical form, all the different products in a catalog.

For each product selected or created, the following information is available:

- **Description**: description of the product.
- **Brand**: brand associated with the product.

The catalog product screen contains the following tabs:

- General
- Composition
- References
- Acquisition
- History
- Documents

The General tab

This tab regroups the following information that is linked to a product:

- Identification
- Sold packaged
- Optional

- **Preinstalled:** This option only appears if the product is associated to a parent item. It indicates that the product is an item which must be associated to its parent item.

Identification

- **Model:** model to which the product is attached. This field is filtered to offer you only those choices corresponding to the value in the **Brand** field.
- **Category:** indicates the hierarchical order of the product (nature/model/sub-model/product). This field is automatically populated.
- **Component of:** specifies the parent product of the selected product (if there is one).

Is sold packaged

This frame enables you to specify how the product is sold (in batches of 2, 3, etc.).

- **Number of items:** defines how many items come in the packaged product.

  For example, a product contains two units per package.
- **Quantity per item:** defines how much each item contains.

  For example, if a product is sold in bottles, each bottle might contain 1 liter.

Is an option

This frame enables you to specify whether or not the product is an option. It only appears if the product is a component of another product.

- **Optional:** designates a product's status as optional or not.
- **Default option:** specifies whether or not the product is the option by default.
- **Option group:** designates to which group of options your optional product belongs.

  You can only have one default option per option group.

The Composition tab

This tab lists the products associated with the selected product.

The References tab

This tab lists the reference(s) of the product selected in its catalog(s).

The Acquisition tab

This tab summarizes the acquisition conditions of a product.

- **Price**: generally quoted price of a product.
- **Date**: date on which the price was quoted.
- **Certification**: itemized list enabling you to set a degree of certification for the selected product.
- **Certification date**
- **Purchase unit**: the unit used for purchasing this product. When buying cement, for example, you can purchase it either in tons or in pounds.

> Note: For more information, refer to the "Units" section of the "Portfolio management" guide.

- **Conv. Coeff.**: the conversion coefficient used to transform a product into an asset.

  For example, you can purchase a product in tons, but use it in pounds once it is an asset in your portfolio.
- **To print**: if you check this box, it prints the product in the purchase request.

Warranty frame

This frame contains the information relating to a product's warranty.

- **Warranty duration**
- **Conditions**

Screens linked to catalogs, catalog references or products

Company catalogs

The **Catalogs** tab of a company's detail regroups all the catalogs that are:

- Distributed by the company.

  If the **Suppliers** tab of the catalog's detail is populated with the name of this company.

- Used by the company.

  If the **Client** tab of the catalog's detail is populated with the name of this company.

Models

The **General** tab contains the catalog reference associated by default to the selected model.

The **Cat. products** tab of a model's detail lists the product(s) associated with the model.

Purchase requests

The composition of a purchase request relies on either a model or a catalog reference. The **Reference** field of a purchase request's composition enables you to specify this catalog reference.

Purchase orders

The composition of a purchase order can rely on a catalog reference. The **Reference** field in the composition of a purchase order enables you to specify this catalog reference.

Receiving

The detail of a receipt line is populated by a catalog reference.

Glossary

This section contains a complete glossary of the terms used in the catalog.

Note: The terms are not classified in alphabetical order.

Product

The product is an item that is outside of your company. It corresponds to one or more references in the catalogs of your suppliers. Example: The HP VECTRA VL 800 product corresponds to a reference in the Micro catalog, a reference in the Direct catalog, etc. A product can correspond to one item (one CPU, for example), or a set of items (a supplier package, for example).

Component

A component is a product that is associated with a parent product. Example: The Optical mouse device is the component of the OptiPlex GX 110 product.

Purchase unit

The purchase unit is the unit used by your supplier to sell a particular product. Example: Your supplier sells sand by the ton. The ton is the purchase unit.

Sold packaged

This a way of selling a product. Example: Ink is sold in boxes of 50 cartridges.

Conversion coefficient

A coefficient enables you to convert a product's purchase unit into the unit you use to manage it in your portfolio. Example: You bought sand by the ton, but now you are going to enter it in your database by units 50-pound bags.

Additional formatted data

Additional formatted data is the data that enables you to calculate a price or a catalog reference (see additional specifications).

Additional specifications

This is a way of defining a request according to several variables. Example: The request for a cable is defined by its length and its diameter.

Option

A product that is an option is one that is associated with a parent product, and thus cannot be detached from this product. Example: The color of a delivery truck is an option (it can't be sold separately).

Option group

An option group regroups different options that all share certain features. Example: The CD option group regroups the following options: CD drive, CD-ROM drive, CDR drive, DVD drive, DVDR drive.

Composition

The association of different products with a parent product is a composition. Example: A mouse, a keyboard and a CD drive are all associated with a CPU.

Manufacturer's reference

The manufacturer's reference is the identification number of a product that is specified by its manufacturer.

Internal reference

An internal reference is the identification number of a product assigned by an AssetCenter counter.

Certification

The certification is the approval accorded by the company concerning a product.

Classification

This is the classification standard assigned to a catalog that enables it to classify the types of products on the market.

Classification code

The classification code is associated with a catalog reference according to the classification defined in the catalog.