Peregrine

AssetCenter

User Interface

Table of Contents

List of Figures

List of Tables

Preface

This guide's objective is to familiarize you with AssetCenter. It details the basic operations that you will perform during your use of the application.

This guide also documents the application's graphical user interface and how to use it.

The following chapters present the application's GUI functions.

These chapters are for:

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

1 Welcome to AssetCenter

AssetCenter is a complete IT management system, comprised of several modules that are totally integrated and share a common repository. AssetCenter enables you to manage your portfolio and the events associated with the life cycle of the items in your portfolio: Procurement, cost management (tax, TCO, maintenance contracts, work orders, etc.).

Because AssetCenter is an "integrated" application, you can access all its functions from the same interface and work on a single database. Among other advantages, this avoids you having to duplicate information. Because it is a "functional" application, you can adapt its interface to your own needs by selecting only he functions you want to access. The interface is thus much simpler to use.

Important:

The list of functions to which you have access depends on the rights granted by the license you acquired from Peregrine Systems, Inc.

This guide is an introduction to the software and to certain essential concepts that will enable you to familiarize yourself quickly and effectively with AssetCenter's GUI.

Conventions used in this guide

What follows is a list of the conventions that we use in this guide

Convention	Description
Java Script Code	Example of the code or command
Fixed-width characters	DOS command, function parameter or data format
...	Portion of omitted code or command.
Note:	Informative note
Extra information	
Important:	Important information for the user
Be careful...	
Tip:	Tip to help you use the application
User tip	
Warning:	Extremely important information for the user
Exercise caution	
Object	AssetCenter interface object: menu, menu entry, tab or button.

The following conventions are also used:

• The steps that we ask you to follow are listed in a defined ordered (in a numbered list). For example
  1 First step
  2 Second step
  3 Third and last step

• All the illustrations and the tables are numbered according to the chapter in which they are found, and the order in which the appear in the chapter. For example, the title of the fourth table in chapter two will be prefixed by **Table 2-4**.

Online help

Online help displays help messages on screen while you are using AssetCenter.

Several systems of online help are available to you in your search for information.

General online help

General online help contains approximately the same information as in the printed guides.

To display online help, simply press F1 from within AssetCenter.

Note:

There is another online help specific to Basic scripts. (A Basic script is a simple program enabling you to customize and/or systematize the behavior of certain parts of the software.) When you use a Basic-script editing window, you can press F1 on the keyboard to display the AssetCenter programming reference, which is the online help for scripts. For example, if you forget the exact syntax of a Basic function while you are creating a script, you just need to select the name of the function in your script and press F1. The programming reference will open to the part dedicated to that function.

Context-sensitive help for fields and links

Context-sensitive help for a field or a link displays:

- The SQL name of the field or link.
- Its type and data-entry format.
- A description of the field or link contents.
- Examples, such as sample data.
- Important information: Data entry precautions, automatic mechanisms, etc.
- System itemized-list values.
- Linked tables.

There are two ways to access the context-sensitive help:

- Put your cursor on the field or link, then simultaneously press the "SHIFT" and "F1" keys.
- Right-click the field or link, and then select **Help on this field** from the shortcut menu.

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

Tip of the day

The tip of the day is an online help that displays tips for using AssetCenter each time you start the application.

You can disable this functionality by unselecting the **Show at startup** box in the Tip of the day window. Click **Next** to display another tip.

You can display tips at any moment via the **Help/ Tip of the day** menu item.
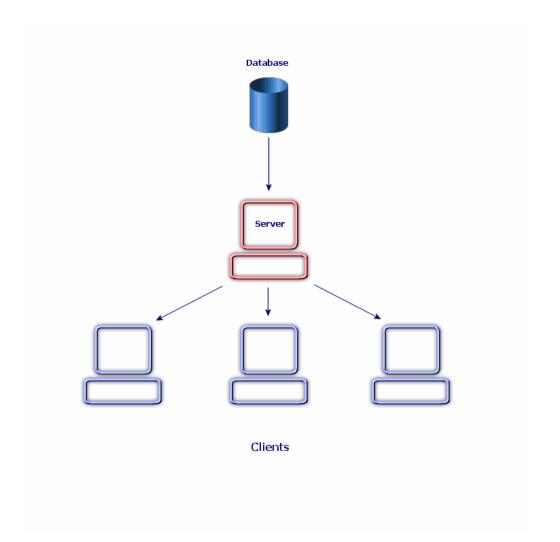
Introduction to the database

Using AssetCenter means that you will be using a database. The AssetCenter workspace, and its consultation functionalities in particular, were designed to hide the complexity of the database behind the interface as much as possible. However, a basic knowledge of databases will help you with the concepts that are often used in the AssetCenter user guides.

Definition of a database

A database is an entity that stores data in a structural manner and with as little redundancy as possible. This data is used by programs (in our case, AssetCenter) and by its users (you). The concept of a database is frequently associated with the concept of a network: A database unites the various data contained within it so it can be accessed by all; a network unites the various information stored on remote computers so it is available to all. This type of database is called a

distributed database. Its main advantage is that it enables several users to access the stored information simultaneously (or concurrently).

Database Management System

To manage the data and the users that access that data, we use a Database Management System (DBMS), which enables you to:

• Access data.

- Manage the access of the users to this data.
- Perform basic operations on this data.
  - Insert: Adding data.
  - Delete: Destroying data.
  - Modify: Modifying data.
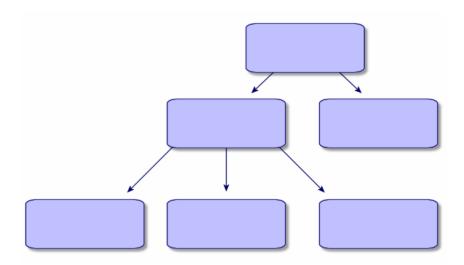
AssetCenter is compatible with the main DBMSs used.

Database models

Two main database models are frequently used to represent the organization of information.
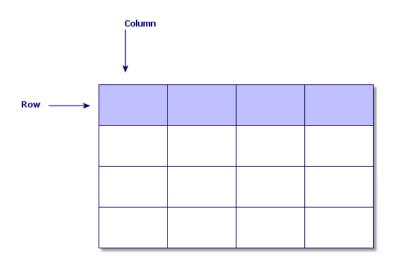
The hierarchical model

In this model, data is organized hierarchically as shown below:

The relational model

In this model, data is organized in two-dimensional tables (rows and columns), as shown below:

Column

Row →
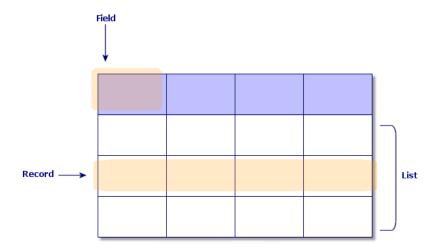
Using the relational model, we thus also define:
- A record as a set of data contained in one of the rows of a table.
- A field as the title of one of the columns in a table.
- The value of a field as the value of one of the cells in the table.

AssetCenter introduces two related concepts:
- A list is composed of a set of records from a table.

- A detail regroups the information from a given record and categorizes them in a logical fashion.

Field

Record

List

Try to remember as you best you can these concepts, since you will come across them many times in AssetCenter.

2 First steps with AssetCenter

This chapter's objective is to familiarize you with the AssetCenter workspace. In particular, we will detail the basic actions that you will perform the first time that you launch this application.

You will thus learn how to:

- Launch AssetCenter.
- Connect to a database.
- Discover the AssetCenter workspace.
- Use, then configure, the different modes of viewing data (list, detail, etc.) that are available to you.
- Enter new data in the database and work with the records.

Launching AssetCenter

There are two ways to launch AssetCenter:

- From your operating system's **Start** menu.
- From the command prompt.

Launching from the Windows Start menu

Launching from the **Start** menu varies depending on where you installed AssetCenter on your computer.

If you used the default values during the installation, you will launch AssetCenter by selecting **Start/ Programs/ Peregrine/ AssetCenter/ Peregrine AssetCenter**.

Launching from the command prompt

To launch AssetCenter from a DOS command prompt:

1 Open a DOS command prompt, by selecting **Start/ Accessories/ Command prompt**, for example.

2 Go to the **bin** folder of the AssetCenter installation folder. For example, if you choose to install AssetCenter in the default folder, enter the following command:

```
cd Program Files\Peregrine\AssetCenter\bin
```

3 Enter the desired command line and validate it by pressing **Enter**.

The following syntax enalbes you to launch AssetCenter:

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

Parameters:

- **-?, h or H**: displays the help message.
- **-cnx**: database connection name (**Name** field in the **Connection** tab of the connection detail, which is displayed using the **File/ Manage connections** menu item.)
- **-login**: login of the employee connecting to the database (**Login** (SQL name: UserLogin) field in the **Profile** tab of the employee detail, which is displayed using the **Portfolio/ Departments and employees** menu item.)
- **-password**: password corresponding to the login (**Password** (SQL name: LoginPassword) field in the **Profile** tab of the employee detail, which is displayed using the **Portfolio/ Departments and employees** menu item.)
- **-view**: view displayed at startup (views available in the **Tools/ Views** menu item.)
- **-config**: modules to activate:
  - itam: Portfolio

- barcode: Bar-code inventory
- procurement: Procurement
- contract: Contracts
- finance: Financials
- cable: Cable and Circuit
- DA_RemoteControl: Remote Control
- DA_Automation: Desktop Administration
- admin: Administration

To activate several functions, separate them by commas.

Example:

```
am -cnx:Base -login:util -password:Password -view:AssetsPentium -config:itam,procurement
```

 Warning:

Parameter values may not contain spaces.

Exiting AssetCenter

You can use the **File/ Exit** menu item any time during your session to exit AssetCenter.

This has the following effects:

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

Connecting to a database

There are two ways to connect to a database: with or without integrated Windows NT security.

Note:

You can only open one database at a time during an AssetCenter session.

Connecting without integrated Windows NT security

To connect without using integrated Windows NT security:

1 Select **File/ Connect to database**.
2 Select a connection that you have already defined from among the choices in the **Connection** field's drop-down list.
3 Enter your **Login** name (SQL name: UserLogin) as defined by the administrator in the **Employees** table (SQL name: amEmplDept).

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

   If you want to connect as an administrator, enter **Admin** in the Login field.
4 Enter your password in the **Password** field.

   The first time that you open a database, you need to use the password assigned to you by your administrator. Once the database is open, you can change your password via the **Tools/ Change password** menu.
5 Click **Open**.

Connecting with integrated Windows NT security

This feature:

• Requires the AssetCenter administrator to have launched the AssetCenter Server at least once.
• Is available to Windows NT, 2000 and XP client workstations.
• Is not available to Windows 95, 98 and ME client workstations.
• Assumes that you are connected to the AssetCenter database with the same login as your Windows connection.

To connect using the integrated Windows NT security:

1 Select **File/ Connect to database**.
2 A window opens in which you need to select an already defined connection from among the choices in the **Connection** field's drop-down list.
3 Select **Use integrated NT security** option.

4   Click **Open**.

 Tip:

Using this feature, you do not have to enter values into the **Login** and **Password** fields; AssetCenter automatically uses your Windows login and password.

Disconnecting from a database

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

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

AssetCenter workspace

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

Menus

The menu bar

All the AssetCenter commands are accessible from the menu bar running across the top of the workspace.

 Note:

You can only activate those menus included in your Peregrine Systems licenses.

Shortcut menu

A shortcut menu is a menu in which each item applies to the part of the program in which you are working. To obtain such a menu, right-click the area in which you are working and then select the desired menu item.

Toolbar

You can access the functions on the toolbar by clicking on any of its icons. Each icon corresponds to an AssetCenter function, and clicking directly on it avoids having to go through the menu bar.

To configure the toolbar, you can use the **Tools/ Customize toolbar** menu item, or you can use the shortcut menu available when you click anywhere in the toolbar zone, except where there are buttons.

Status bar

A status bar at the bottom of the workspace displays the following information from left to right:
- A description of the selected zone (active fields, highlighted menu items, etc.).
- The name of the open database and the login used.
- The current operating mode (browse, create, modify).
- The time of day.

Functions and favorites pane

The pane displayed by default on the left-hand side of the workspace is useful for two reasons:
- The **Functions** tab classifies the functions available in AssetCenter by functional domain. The essential functions accessible via the menu bar are also listed in this panel. All items in AssetCenter for which you can select a functional domain (actions, views, etc.) are displayed in this pane. The contents of the pane are updated according to the context.
- The **Favorites** tab enables you to save favorites. You can thus directly access screens, views and other items that you regularly use via this tab. To create a favorite:
  1 In the **Functions** tab, select the link that interests you.
  2 Right-click.
  3 Select **Add to favorites** from the shortcut menu that is displayed.
  4 The link is created in the **Favorites** tab.

Display priority

The displaying of a screen is subjected to the following priorities:

1   The query wizard, has priority over
2   a view, which has priority over
3   a customized screen, which has priority over
4   a system screen.

For example: When you display the Portfolio Items screen, it is filtered by a query wizard. If you specify a filter condition in the wizard, the screen that is displayed will take your query into account. To display the unaltered system screen, you must close the prefilitered screen and then reopen it without specifying a query condition.

ToolTips

When the mouse pointer comes to rest over certain areas, in particular over icons on the toolbar, a ToolTip appears to indicate that tool's function.

Use the **Edit/ Options** menu item to enable or disable ToolTips.

Example

In the lists, if you cannot see the entirety of the information in a column because the column is too small, a ToolTip appears showing the text in full.

System information, installed and recognized components

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

The **Help/ About AssetCenter** menu displays this box.

If an Internet browser is installed on your workstation, you can visit the Peregrine Systems Web site by clicking the http://www.peregrine.com [http://www.peregrine.com] hypertext link appearing in this box.

When you click **More**, a window appears in which you can see the packages installed and recognized by AssetCenter.

This window contains information about:

• The installed software (version number, description, software name, etc.), grouped under **Software**.
• The client workstation, grouped under **System information**.

- The open database.
- DLLs or executables required by the database engines compatible with AssetCenter:
  - If a dynamic link library is installed, AssetCenter automatically detects it and displays its full path name in the second column. Additional information about the library appears in the third column of the screen displaying installed and recognized components.
  - If no dynamic link library is found, **File not found** is displayed in the second column.
  - If a dynamic link library is found but no additional information is available, AssetCenter displays **Information not available** in the second column.

Click **Copy** to copy this information to the Clipboard. Click **Close** to close the window displaying installed and recognized packages.

Record lists

This section deals with the following topics:
- How lists work
- Using lists
- Moving within lists
- Action buttons concerning record lists.
- Hierarchical organization
- List display parameters
- Viewing statistics
- Main list layout
- Drop-down list layout
- Searching for a record in a list.
- Manipulating records in a list.
- Exporting a list

How lists work

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

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

Using lists

A list is a window that displays all the records of a given type. It enables you to search for records, modify them and display detailed information about one of them in the detail window.

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

Note:

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

Moving within lists

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

You have several ways to move within a list:

- Using the Edit Menu
    - Beginning of the list: **Edit/ First record**
    - Previous record: **Edit/ Previous record**
    - Next record: **Edit/ Next record**
    - End of the list: **Edit/ Last record**
- Using function keys
    - Start of list: CTRL+F11
    - Next record: F12

- Previous record: F11
- End of list: CTRL+F12
- Using the keyboard
  - Beginning of the list: HOME
  - Previous record: UP ARROW
  - Up one page: PAGE UP
  - Down one page: PAGE DOWN
  - Next record: DOWN ARROW
  - End of the list: END
- Using the horizontal or vertical scroll bar

The Loading button

AssetCenter enables you to specify the maximum number of records to be automatically displayed in a list. To do this, select the **Do not load more than** option, accessible via the **Edit/ Options** menu.

When you click the ▣ button at the top of the screen, it displays the previous records; the ▣ button at the bottom of the screen displays the next records. The display of these records always respects the maximum number of records to be shown that you specified in the Options screen.

To load all the preceding or following records, hold the Shift key down and click the ▣ button.

Indication of list loading

This button, which looks like this ⌈ 20 / ? ⌋, indicates the number of records loaded compared to the total number of records in the database after filtering.

If a "?" appears in place of the right hand number, click the button to display the total.

Action buttons concerning record lists

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

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

Delete: Deletes the selected record.

Detail: Displays the details of the selected record.

Select: If you click the ▣ button to the right of a linked field, you will be able to populate that field by selecting a record in another table. AssetCenter displays a "Selection window", which contains a list of records. Select the record to you want to link and click **Select** to confirm your choice, otherwise press the **Delete** button to cancel your choice. The ▣ button is only displayed if the **Selection windows** field in the navigation options of the **Edit/ Options** menu has been correctly configured.

▦: Enables you to calculate the sums of the numeric values for each column in the main list.

Close: Closes the window.

Hierarchical organization

Certain tables in AssetCenter are organized hierarchically: Each record can have a sub-record. AssetCenter does not limit the number of levels that can exist in the such tree structures.
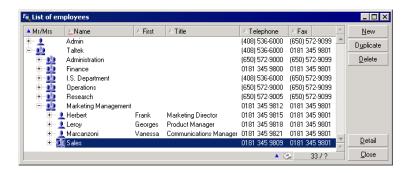
Examples:

- In the Locations table, a given location A may be a **sub-location** of a given location B.
- In the Assets table, an asset may be a **component** of another asset.
- In the Departments and Employees table, the "Sales head office" department has a sub-department called "Sales". "Sales head office" is the "parent" or "parent department" of "Sales". This creates a hierarchy as shown below:

View type

The records of tables that are structured hierarchically (Models, Locations, Departments and Employees, etc.) can be viewed either in "table view" or in "tree view".

Figure 2.1. Employees table - tree structure

The view type is selected as follows:

- Using the **Window/ Tree view** and **Window/ Table view** menu items for main lists.
- Using the shortcut menu (right-click in the list) to select either **Tree view** and **Table view** for main lists or tab lists.

When you are in "tree view", you can expand a level by using the ⊞ button in the tree, or collapse a level with the ⊟ button.

In tree view, you access the **Unfold** option by right-clicking in the list. This option lets you define how many hierarchical levels you want to see displayed in the tree structure: one, two, three or all. If you close the window, you will loose this configuration.

Below is a list of keys and shortcuts available from the keyboard that control views:

- List view: CTRL+L
- Tree view: CTRL+T

Important:

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

Modifying the hierarchical organization of a table

1 Open a hierarchical table.

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

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

4 Unfold the tree to your desired level:
  - Either by clicking a node in the hierarchy.
  - Or by using the **Unfold** command in the shortcut menu.

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

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

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

Or:

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

2 Select all the records with the same parent.

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

4 Click **Modify**.

Regrouping records: Virtual hierarchy

The hierarchic view is only available for hierarchic tables. You can however, group records together according to the field. Doing so creates a virtual hierarchy.

Note:

Grouping is available for both hierarchic and non-hierarchic tables.

This functionality is useful as it makes viewing and searching more confortable.

For example, the Assets table (amAsset) can only be viewed in a flat mode. By creating a virtual hierarchy you can make a quicker selection of an asset and its sub-assets when filling a work order.

Creating a virtual hierarchy

- To regroup your records according to a field:
  1 Open the screen of your choice.

     Make sure the screen is in list and detail mode.

2   Right-click this field, and then select **Group by this field** from the shortcut menu.

The list is reorganized according to the elements contained in the list of the selected field and the ⬛ button is available. The elements defining the hierarchy are shown in gray.

For example:

1   Open the Natures screen,
2   Right-click the **Create** field,
3   Select **Group by this field**.

The flat list become hierarchic.

- To group your records by an element not shown on the screen:
    1   Open the screen of your choice.
    2   Right-click the list and select **Configure list** from the shortcut menu.
    3   In the **Group by** field, select the field or link that is the criteria for the grouping.

For example, to view the assets according to their model in the Assets and Batches screen:

1   Open the Assets and Batches screen.
2   Right-click the list and select **Configure list** from the shortcut menu.
3   In the **Group by** field, select the Models (**amPortfolioItem.Model**) link

Cancelling a virtual hierarchy

To cancel a virtual hierarchy:

1   Right-click the list that was modified by a grouping.
2   From the shortcut menu, select **Ungroup all**.

Grouping on a hierarchical table

The special relationship that exists between some tables, as for example the one between the Assets table and the Portfolio table, allows a hierarchical table to benefit from the hierarchy of an other hierarchical table.

As an example, to use the hierarchy of the Portfolio table in the Assets table, group by the **Portfolio.Parent** link. The assets and batches list shows for each asset its component sub-assets.

Note:

In this particular case, the list does not show the element used for the hierarchy in grey.

List display parameters

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

- View type: "Tree view" or "List view"
- Display mode: "Details only", "List only" or "List and details"
- List sorts using the column header buttons.
- List configuration (shortcut menu item **Configure list**):
  - Selection of fields to display by column
  - Sorts
  - Filters
- Application of filters
- Window size

A window's parameters are memorized each time you close it. If you want to revert back to a list's default settings, you need to press **Shift** when you display a list or the corresponding icon on the tool bar.

List layout

You can configure differently the lists of the same table.

In this way, the list of assets displayed in the **Assets** tab of a contract detail can have different display parameters from the same list that is displayed by the **Portfolio/ Assets and batches** menu item.

Quickly sorting a list

There is a button at the top of each column in the list that bears the name of a field. This button enables you to alphabetically sort the values of this field for each record in the corresponding table.

Figure 2.2. Employees table - list sorting tools

Click ▲ in order to sort a column's values in ascending order. If you double-click ▲, it will sort the column's values in descending order (inverse). If you simultaneously press Shift while doing this, the values will be directly sorted in descending order.

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

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

Quickly adding a column to a list

You can add a column to a list from a detail screen. Right-click the object (field or link) whose values you want displayed as a new column and select **Add this column to the list** from the shortcut menu.

Adjusting the size of columns in main lists
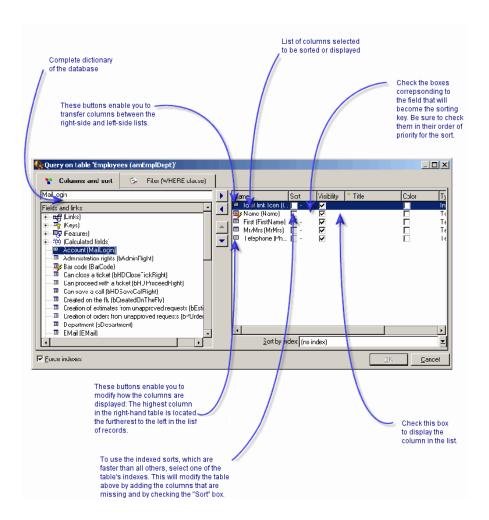
Press F9 to obtain maximum column size when the list is active.

Pressing CTRL+F9 will optimize the size of these same columns so that their values appear in their entirely. If you double-click the top-right border of a column header, AssetCenter automatically adjusts the column size for this column only.

Using the Configure list shortcut menu item

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

Figure 2.3. Configuring a list

List on the left

The **Columns and sort** tab contains an hierarchic list of all the elements in the current table that you can display or sort in the main list. The following icons are used to identify the different items:

- ▫ designates a field.
- ▯ designates an indexed field.
- ▣ designates a monetary value.

- ⊞ and ⊶ designate a link.
- ⊞ designates a feature.
- ⨍⁽⁾ designates a calculated field.
- ⊞ designates a key.
- ⊞ designates a link to a comment.
- ◢ designates a link to an image.

You can also double-click on an element in the left-hand window to transfer it to the right-hand window. The corresponding columns will be added to the main list once you click **OK**. To remove an element, go through this process starting from the right-hand window and moving an element to the left.

The field above the list enables you to enter an element from the database dictionary by typing its SQL name. AssetCenter automatically types ahead for you.

List on the right

This list contains the items selected for sorting or display.

Sort column

Clicking on a column header activates the sort of the values contained in that column. Click once and the triangle points upward, meaning that the sort is ascending; click twice and the triangle points downward, meaning that the sort is descending. A third click disables the sort.

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

🖊 Note:

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

Visibility column

Selecting the checkbox corresponding to the options on the left determines whether or not the column should appear in the list.

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

Title column

This column allows you to replace the default description of the column headers.

Color column

This column allows you to select the calculated field that defines the color used to display lines of text in the list.

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

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

For example:

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

To do this:

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

Table 2.1. Calculated field - color of the column

Field	Value
Table (SQL name: Table-Name)	**Contracts** (SQL name: amContract)
Field type (SQL name: se-Type)	**Basic script**
Result type (SQL name: seDataType)	**Numerical**
Calculation script (SQL name: memScript)	`If amDateDiff([dEnd],amDate()) < 7776000. Then RetVal = AmRgbColor( "RED" ) Else RetVal = AmRgbColor( "BLACK" )End If`

2   Use the **Contracts/ Contracts** menu item to display the list of contracts.
3   Configure the list using the **Configure list** command from the shortcut menu.
4   Add the calculated field that you have just created in the list of columns displayed.
5   Check the **Color** column for this field.

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

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

Type column

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

Sort by index column

The **Sort by index** field allows you to select an index as a sort key rather than selecting sort keys by checking the boxes in **Sort** column of the list above.

If you select an index for the sort, the necessary columns are added and the index replaces any sort keys selected in the table. Certain indexes concern several columns.

Sorting on an index makes sorts faster.

Drop-down list layout

Drop-down lists (combo boxes) can be displayed by clicking ▣ in a detail screen to the right of a field.

The drop-down list of a hierarchical list can appear in tree form if you select **Yes** in the **Trees in drop-down lists** navigation option, accessible via the **Edit/ Options** menu.

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

•   When it is displayed in tree form, the records are sorted alphabetically according to **Full name**.

Viewing statistics

AssetCenter offers you the possibility to graphically view a column's or a field's statistics.

To view statistics:

1 Move your cursor to the column or field for which you want to view the statistics.

2 Right-click.

3 Select the **Statistics on this column**, **Statistics on this field**, or **Statistics on this link** shortcut menu that appears according to the part in which you are working.

4 AssetCenter displays the statistics in a new window.

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

Note:

The statistics are limited to the first ten values found by AssetCenter. All other values are grouped in the **Other values** category.

Presentation of statistics

You can choose between several different types of graphical representation.

To modify the graphic's appearance, right-click on the graphic and choose:

- Among the available graphics:
  - Vertical bars
  - Horizontal bars
  - Lines
  - Pie chart
- Among the available views:
  - 3D view
  - Stacked view

You can also display the graphic's key, which corresponds to the colors in the pie chart view, or a marbled background.

Searching for a record in a list

If you sort by the field containing the value you want to find, and you click on the corresponding column, you can then search for any record having that value:

1 Right-click anywhere in the list area: A shortcut menu is displayed.

2 Click the **Go to** command and type the first few letters of the value to find. AssetCenter automatically completes the rest of the information, displaying the closest existing value in the database.

3 When the correct value is displayed click the **Go to** button. AssetCenter positions the cursor on the item in the list whose value is greater than or equal to the value entered via the keyboard.

Note:

The keyboard shortcut equivalent to the **Go to** command is Ctrl+G.

Other ways to search records

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

Manipulating records in a list

Selecting one or more records in a list

Selected records are displayed as being highlighted in the list. The first record is selected by default. You can select another record by moving the cursor with the arrow keys or clicking the item itself. You can select several items by using the CTRL or SHIFT key with the mouse.

Selecting all the records in a list

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

Moving a record in a tree view list

In a tree list you can move a record from one point in the tree to another by simply "dragging and dropping" it with the mouse. Click the item and, while still pressing on the mouse button, move the cursor to the new position and release the mouse button.

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

Adding objects to a floor plan

When you define a floor plan (**Portfolio/ Floor plans**) you can add records (assets, employees, etc.) from other lists directly onto the floor plan by dragging and dropping the records.

You can drag any element directly onto the floor plan, or you can drag its corresponding icon, if there is any, which appears in the detail screen.

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

Move the records around the floor plan using the mouse.

For more information, refer to the "Core tables" guide, chapter "Floor-plans".

Exporting a list

AssetCenter exports the list that you have selected, after any possible filters, exactly as it appears on the screen.

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

To export a main list or a list in a detail, you can also use the **Export list** shortcut menu item.

1 Enter the name, extension and path of the text file where the exported data is stored into the **File** field of the dialog box.

   Select the **Export name of the table** option so that the table's name will appear at the head of the exported text file.

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

2 Select the **Export column headers** option so that the column names will appear at the head of the exported text file.

3 Select the **Export the identification numbers** option to export the Id numbers along with the records. In other words, you will be exporting the table's "Id" field (for example, the "lAstId" in the Assets and batches table).

4   Among the "." "," ";" "Tab" characters of the drop-down list **Separator**, choose the one that should separate each field in the exported main list.

5   Click **Export**.

Warning:

Before you go on, we highly recommend that you save the database before importing the data. Finally, to export the data, all AssetCenter users can use the **Export list** shortcut menu item, which allows the active list to be exported. Only AssetCenter administrators, however, can use the AssetCenter Export option, since it enables you to perform very complex export procedures. Refer to the administration guide for more information about this subject.

Record details

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

You will find information about the following topics:

- Accessing a record detail.
- Combined list and detail view.
- Resizing windows.
- Buttons in a record detail.
- Tabs.
- User-defined fields.

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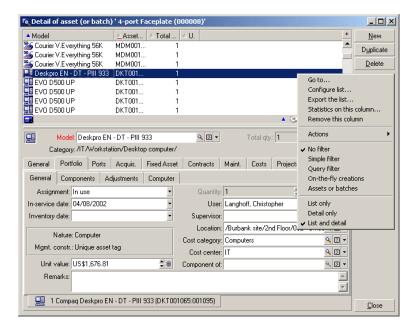
Once you have displayed a record list, select the item you want, then double-click it or click the **Detail** button to display all information concerning this record. This information is divided into tabs organized by subject matter.

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

Combined list and detail view

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

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

Figure 2.4. Combined display of the list of assets and of a detail

The following keyboard shortcuts are assigned to these modes:

- List only: "F6"
- Detail only: "F7"
- List+Detail: "F8"

Note:

In "List+Detail" mode, you can display the list in horizontal mode (the list is displayed above the detail screen) or vertical mode (the list is displayed to the left of the detail screen). To switch between these two modes, right-click the empty part of the detail screen (below the **New**, **Duplicate**, **Delete** buttons) and select **Switch to horizontal mode** or **Switch to vertical mode** as needed, or double-click on the split bar.

Resizing windows

AssetCenter enables you to adjust the windows to a non-maximal size.

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

To change the size of the list and detail areas (to move the line that separates the two areas):

1 Move the cursor to the line separating the list area from the detail area until the pointer changes shape.
2 Click the mouse and, while holding down the mouse button, move the pointer to the desired position.
3 Then release the mouse button.

Buttons in a record detail

Modify: Saves modifications made to the detail window.

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

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

Cancel:

•   When you are creating a record, clicking this button will cancel the creation of that record.

- When you are modifying a record, clicking this button will cancel the modifications and revert to the original.

⊠: Displays the details of the selected item.

▣: Displays a window that enables you to select a linked record. You can control the display of this button in the **Selection of windows** navigation option, accessible via the **Edit/ Options** menu. The list displayed is the standard list of linked records. The title of this list depends on its context. For example, if you select the user of an asset 'bbb', the list of departments and employees is displayed but the window is labeled "User of asset 'bbb'", and not "List of employees".

⊡: Displays a drop-down list of values. The types of values available in the list depends on the field in which you are working. Although the choices available are actually linked records in another table, this drop-down list only offers you choices in a simple column form. This is contrary to the list displayed by the ▣ button, which is the standard, main list.

◀: Displays the tab list to the left.

▶: Displays the tab list to the right.

⊞: Adds a record to a detail list. For example, this may be the list of contracts concerning an asset, which appears in the **Contracts** tab of the asset details.

⊟: Deletes a record from a details list.

🐸: Adds an alarm to the field to the left of the button.

Tabs

AssetCenter displays database record information in a "detail" zone. The pages that appear by selecting specific **tabs** group the information by theme (usually corresponding to tables).

A detail thus includes several tabs that sometimes contain sub-tabs. The name of the sub-tab is defined by the fields of the corresponding page.

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

A tab is grayed out when the following conditions are met:
- The tab represents a series of multiple links to the selected record.
- None of these multiple links have been created.

Adding the first link automatically activates the tab. To add this first link:

1   Select the unnamed tab.

2   Right-click.
3   Select **Add link** in the shortcut menu.
4   Enter the values of this link.
5   Click **Modify**.

User-defined fields

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

The administrator may modify their names and properties using the database customization functions, such as **Configure object**.

Important:

We recommend configuring all extra fields in the tab so that each one corresponds fits into the logic of the tab as a whole.

Operations on records

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

You will find information about the following topics:

· Creating a record.
· Modifying a record.
· Modifying a selection of records.
· Refreshing multi-user operations.
· Duplicating a record.

- Deleting records

Creating a record

To create a new record, first display the list in which you want to add a record.

AssetCenter lets you create a record from an empty window by clicking the **New** button, or by copying the item selected in the list by clicking the **Duplicate** button.
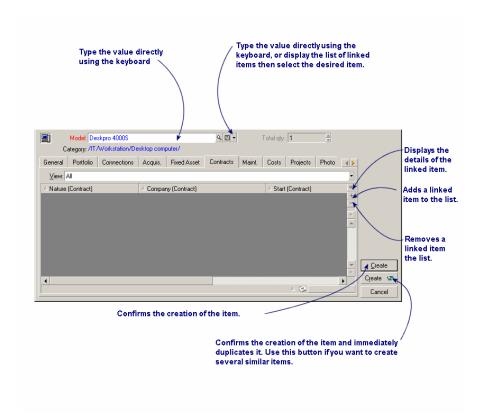
Fill in the information concerning the item being created.

- When you enter the first letters of a value recorded in a drop-down list, AssetCenter automatically fills in the rest. If the value that you are entering does not yet exist, AssetCenter will ask if you want to create a new record in the linked table. You then have two choices:
  - **Create on the fly**: AssetCenter creates a new record in the linked table, but does not display its detail. You can fill in the rest of the information later.

    This option can be disabled via the **Options/ Authorize creations on the fly** menu.
  - **Detailed creation**: AssetCenter displays a detail window for this new record. You can enter the information concerning this new record immediately.
- When first creating a record, AssetCenter assigns default values to certain fields. These default values may be modified. If the default value refers to other fields (model for an asset, for example) in the detail of the item being created, the program waits until those fields have been populated before displaying the corresponding part of the default value. The formulas that define these fields are only applied when the record is first created; they are not used when you modify a record.

🖊 Note:

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

Figure 2.5. Creating a record

Type the value directly using the keyboard

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

Displays the details of the linked item.

Adds a linked item to the list.

Removes a linked item the list.

Confirms the creation of the item.

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

Modifying a record

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

•   Direct information, which can be modified by simply typing in the field.

•   Linked information, which can be modified:

    •   By selecting another value in the list either using the ▾ icon (for a drop-down menu) or using a ▣ icon (selection window) to the right of the field.

    By typing another value in the field.

- By using the ▣ button to the right of the field to display the details of the linked item. This lets you modify information concerning the linked item (for example, changing a supplier's telephone number).

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

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

Modifying a selection of records

It is possible to modify a selection of records simultaneously. Display the list in "List and Detail" mode and simultaneously select the records to modify in the list. AssetCenter then displays the detail:

This function is only available if you are modifying a set of values that will be the same for all fields.

Display the list in "List and details" mode and simultaneously select the records to be modified in the list.

AssetCenter then displays in the details window:
- The fields that contain the same values: White background.
- The fields that contain different values: Gray background.

The detail enables you to modify the fields on a white background.

🖉 Note:

The other solution, more complex but more powerful, involves exporting the records to modify them outside of AssetCenter, then importing them again once the information has been modified. Refer to the "Exporting lists" chapter in the "Record lists" section for more information.

Refreshing multi-user modifications

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

While one user of AssetCenter is working, other users may have modified information, added or deleted records. The modifications appear automatically when you open the screen.

But if you open a list or a detail window that has been modified by someone else, these modifications will only appear in your version after having pressed F5, or by selecting the **Window/ Refresh** menu item.

By applying a filter or a sort, or by going from one type of view to another (tree or list), you will automatically update the information in your window. Displaying a detail from another record also performs the same function.

AssetCenter applies the following rules:

- Several users can edit the same record with no restrictions and without receiving a message.
- When a user clicks the **Modify** button, the program looks at each field individually and compares the value on the screen to the value stored in the database.
    - If the value in the database is the same as the value on the screen, nothing happens.
    - If the value on the screen is different from the value in the database, then the value on the screen is saved in the database.
- If two users modify the same field on the same record, a warning message is given to the user who is last to confirm the modification. The last one to click **Modify** is the user whose modification will be stored in the database.
- Technically, here is what happens when you click **Modify** : The record is locked for a fraction of a second to give the program time to write the information in the database. While the record is locked, no other user can write to the record. Other users may read the record, however.
- If a user edits a record and the record is deleted by another user in the meantime, the user who is editing the record receives an error message when they click the **Modify** button.
- For counters: Counters are incremented each time a user presses the **New** button. If they cancel without confirming the creation and no one else has used the **New** button, the counter returns to its original position. If a user

has pressed the **New** button in the meantime, the counter is not decremented when the creation of the record is aborted (there will therefore be discontinuities). If two users click **Create** at the same time, AssetCenter issues two successive numbers.

For certain tables, updating is processed specifically.

There are options that enable you to define the caches that will be refreshed either when another connection to the database is made or when you select the **Tools/ Refresh caches** menu item (CTRL+F5 shortcut key). These caches are different from the connection caches of the connection edit screen.

Duplicating a record

There are two ways to duplicate a record:

Duplicating a record with the Duplicate button

To duplicate a record:

1   Select it from the list.
2   Click the **Duplicate** button: AssetCenter creates a new record and copies some of the information.
3   Now you can modify and complete the details of the duplicated record before confirming the creation with the **Create** or ⌈Create ⊗⌉ button. Clicking the ⌈Create ⊗⌉ button is equivalent to successively clicking the **Create** button followed by the **Duplicate** button.

Duplicating a record with the Edit/ Duplicate menu

To duplicate a record:

1   Select it from the list.
2   Select **Edit/ Duplicate**.
3   In the window that appears, set the number of copies you want to create.
4   Click the **Duplicate** button to add the copy of these records into the database.

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

Important:

Before selecting the **Edit/ Duplicate** menu item, you need to define the default values for the mandatory fields and the unique default values for the "non-duplicable" indexes. AssetCenter informs you if it cannot duplicate a record in which certain values must be unique. It is important to reapply the default value of a field when you use it as a counter.

The **Reapply default value in case of duplication** property is defined with AssetCenter Database Administrator in the **Script** tab.
- If not selected: Copy the source value.
- If selected: Apply the default value (RetVal="default value") in the **Default** zone.

Deleting records

Once you have selected the records to be deleted, click the **Delete** button to remove them from the list. If these records are linked any record in another list, the system displays an error message. If not, AssetCenter will delete them.

Note:

You can delete linked records by activating the option **Authorize extended deletions** via the **Edit/ Options** menu.

Warning:

Before deleting a record, you should consider the ramifications of this deletion, since it is not reversible. Does the record concern an erroneous creation in the database? Does it represent an item that has disappeared from the portfolio? And so on. Sometimes it is better to change the status of an item or move it to another location in the database rather than deleting it.

Editing data

You will find information about the following topics:
- Assigning values by default

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

Assigning values by default

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

Your AssetCenter administrator selects the fields to which this applies:

- Either by using AssetCenter Database Administrator.
- Or by moving to the field to be configured and using the **Configure object** menu item in the shortcut menu. In this case, modifications are stored in the database:
  - Either when a positive reply is given to the confirmation message that appears when disconnecting from the database.
  - Or by selecting the **Tools/ Administration/ Save database configuration** menu item.

The default value can then be created from a formula using fields, variables, constants, etc.

Special case of calculated fields

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

Special case of links to the Comments table

It is not possible to assign default values to links that point to the **Comments** table (Nom SQL : amComment).

Special case of linked records

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

Important:

If you modify the values of fields in the linked record after creating the new record, the values of fields in the new record are not modified.

If you modify a linked record in the detail of a new record after clicking the **Create** button, the default value formulas of fields are not recalculated.

The administrator can assign default values, calculated using information from linked records, to fields that are directly in the table.

These default values are automatically calculated as soon as you populate and leave the linked field used in a formula.

Note:

Many tasks are carried out automatically by AssetCenter Server. These tasks often have priority over the default values of fields.

Cut

AssetCenter allows the user to:
- Cut text.
- Cut records in lists inside details.

Cutting text

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

Note:

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

Cutting in detail lists

A detail list is one that appears in certain tabs of a detail (for example: the list of assets in a contract, the list of assets at a location, etc.)

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

1 Select the records to be cut.
2 Use the **Edit/ Cut** command.
3 Click **Modify** to record the operation.

Warning:

Sometimes, only the link to a target record is deleted, whereas the target record is left intact. (Example: The contracts appearing in the **Contracts** tab of asset details.) Sometimes, the record itself is deleted. (Example: Expense lines in the **Costs** tab of asset details.)

The records can be recovered from the Clipboard using the **Edit/ Paste** command.

Note:

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

Copy

AssetCenter allows the user to:

- Copy text.
- Copy records in lists inside details.

Copying text

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

Note:

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

Copying records in a list

To copy records from a main list or a detail list, select the records then use the **Edit/ Copy** command.

The order of the columns is respected when copied.

Note:

The **Edit/ Copy** command does not apply to images.

Paste

AssetCenter allows the user to:

- Paste text.
- Paste records in lists inside details.

Note:

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

Pasting text

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

Note:

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

Pasting in detail lists

A detail list is one that appears in certain tabs of a detail (for example: the list of assets in a contract, the list of assets at a location, etc.)

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

Precautions before pasting in a detail list

- The user cannot choose the mappings between the fields to be pasted and the columns in the detail list. You therefore must prepare the data to be

pasted so that it corresponds to the structure of the columns in the detail. For example, if you place your cursor in the first column of the detail list, the data belonging to the first column to be pasted will be pasted in the first column of the detail list; the data from the second column to be pasted will be pasted in the second column of the detail list, and so on.

- It is important to place your cursor in the column of the detail list from which you want to paste data. You must also verify that the number of columns to be pasted is identical to the number of columns to the right of column A (column A included).

- If records are selected in the detail list, the records pasted replace the selected records. Don't forget to unselect the record in the detail list, which is selected by default, if you don't want it to be deleted from the detail list when the data is pasted. (This is done by clicking it while holding down the CTRL key.)

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

Deleting text

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

Note:

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

Date- Data-entry rules

- Use the Windows Control Panel to define the order format for entering and displaying the day, month and year. Use this order when entering dates.
- You must always enter all three items: day, month and year.

- To separate the days, months and years, use one of the following characters: /,- ; : or a space.
- You do not have to enter a "0" before single-digit years, days or months.
- You may enter the year in 2 or 4 digits (for example, "1996" or "96"). Numbers from 00 to 49 return 2000 to 2049. Numbers from 50 to 99 return 1950 to 1999.
- To enter today's date, press "CTRL" + ";".

Durations: Data-entry rules

Use the abbreviations recognized by AssetCenter:
- Seconds: second|seconds|s|sec|secs
- Minutes: minute|minutes|mn|min|mins
- Hours: hour|hours|h
- Days: day|days|d
- Months: month|months|mon|mo
- Years: y|yrs|year|years

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

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

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

Note:

All "Duration" type fields are stored in seconds.

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

Time: Data-entry rules

Hours, minutes and seconds are authorized.

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

Date + time fields- Data-entry rules

These fields are processed differently from "Date" fields.

The entry format for a "Date and time" field is:

```
Date[<Sep>[Hour]]
```

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 2000 to 2049. Numbers from 50 to 99 return 1950 to 1999.
- Use the CTRL+ SEMI COLON (;) keyboard shortcut to display the current date and time.

Images

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 quickly.
- Windows metafiles. These are vector-based images that are slower to display but that may be re-sized without loss of quality (files with **.mtf** extension name).

- Icon (files with **.ico** extension name).

Recommendations

- In the **Photo** tabs, you can use any of these three formats.
- The small images that serve to illustrate records (the small square in the top left of record detail windows) are limited to a size of 16*16 pixels. For these images, we recommend using the **.bmp** format.
- To save disk space, we recommend using 16-color images.

Associating an image to a record

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

- Either double-click the area where it is to be inserted. AssetCenter displays a window that permits you to select the graphic file containing the image.
- Or right-click and select **Select image** from the shortcut menu.

To detach an image, place the pointer on the image right-click to display the shortcut menu. Select **Delete image**.

Storing images

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

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

Note:

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

---

3 Customizing a client workstation

CHAPTER

This chapter's objective is to teach you how to customize your workspace.

You will learn how to:
- Only select the functionalities that are useful to you.
- Customize the organization of information in your screens.
- Define the options that will best adapt the interface to your personal needs.

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

If you want to return to the default configuration for the screens (the windows describing tables), cancel your customization options for the duration of your session by selecting the **Tools/ Reinitialize screens** menu item.

Activating the modules

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

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

Customizing the toolbar

This section explains how to customize the AssetCenter toolbar.

Adding a button to the toolbar

1 Use the **Tools/ Customize toolbar** menu item to configure the toolbar.

2 Select the tool category containing the button you want to add.

   AssetCenter displays in the **Tools** frame the button corresponding to the selected category. The **Description** frame provides the description of the selected button.

3 In the **Tools** zone, select the button of your choice and drag it to the desired position on the toolbar.

   AssetCenter integrates the button into the toolbar and resizes it as necessary.

Removing a button from the toolbar

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

Repositioning a button in the toolbar

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

Adding a separator in the toolbar

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

Note:

It is not possible to have two separators together; you can only have one between two buttons.

Removing a separator from the toolbar

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

Restoring the default toolbar

AssetCenter is delivered with a standard toolbar that you can restore by selecting the **Standard toolbar** checkbox.

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

Modifying the position of the toolbar

The position of the toolbar in the workspace can be modified using the **Position** tab in the toolbar customization window.

Click the button corresponding to the position in which you want to find your toolbar. Or, you can move the toolbar anywhere you like on the workspace by choosing **Floating** toolbar.

Customizing tabs

Each user can select the tabs to be displayed in a detail window and the order in which they are displayed. Other workstations are not affected by these modifications.

Use the **Tools/ Configure tabs** shortcut menu when your cursor is in the tab zone to make these modifications.

Figure 3.1. Configuring tabs in a detail

- To show a hidden tab, you can double-click on its name in the list on the left.
- To hide a visible tab, double-click on its name in the list on the right.
- You can change the order of items in the right-hand list. Click on the desired item and use the up and down arrows to the right of the list to move it to a new position. The tab at the top of the list appears on the left-most side of the detail window.

General options

AssetCenter's options can be configured via the **Edit/ Options** menu.

To find out what an option corresponds to and how to configure it:

1 Display the options window (**Edit/ Options** menu).
2 Select the option in question.
3 Consult the **Description** field, which is also in the options window.

To modify an option:

1   Display the options window (**Edit/ Options** menu).
2   Select the option to modify.
3   Click in the **Value** column.
4   Select a value from the list (if a list is available) or enter a value manually.

Note:

The modifications made to the options in this window are saved after you click **OK**.

Functions of the buttons

- **Reset**: Sets all options to their default values and saves.

  Warning:

  You cannot cancel the action once you reset.

  You cannot reset a sub-set of options.

- **Apply**: Saves the values of all the options but does not close the window.

  Warning:

  You cannot cancel this action once you apply.

- **OK**: Saves the values of all the options and closes the window.

Administrator information

There are several types of options:

- The options independent of the databases.

  Their values are stored on the hard drive of the machine where these options are defined.

- The options dependant on a database.

  Their values are stored in the database and associated with the login of the person making the modifications.

  Anyone who connects with the same login, even if it's from a different computer, will find the same optional settings.

> 💡 Tip:
>
> To find out whether an option is independent on a database:
> 1 Launch AssetCenter without connecting to a database (or if you are already connected, disconnect from the database).
> 2 Display the options window (**Edit/ Options** menu).
> 3 The only options available in this window now are those that are independent of the database (and stored on the hard drive of the computer). All database-dependent options in this window are grayed out.

Customizing buttons

Buttons in screens may be associated with any of the following object types:
- Actions
- Screens
- Views
- Forms
- Reports

The main function of the button remains enabled (for example, the **Duplicate** button still duplicates records), except for the 🔳, 🔳 and 🔳 buttons, which once associated with an object lose their main function.

The associated object is associated:
- Before the main functions of the **New** and **Duplicate** buttons.
- After the main functions of the **Creat**, **Modify** and **Create/ Duplicate** buttons.

In certain cases, if the associate object does not execute successfully, the main function of the button is canceled.

Prerequisites

To modify the buttons and associate an object to them:
1 Display the options window (**Edit/ Options**).
2 Select the option **Edit/ Enable customization of buttons in screens**.
3 Set this value to **Yes**.

4   Click **OK**.

Associating an object with a button

To associate an object with a button:

1   Display the screen to which the button belongs (**Portfolio/ Computers**, for example).
2   Right-click the button to modify, and then select **Customize** from the shortcut menu.
3   Select the object to associate.
4   Click **OK**.

Modifying the object associated with a button

To modify the object the object associated with a button:

1   Display the screen to which the button belongs (**Portfolio/ Computers**, for example).
2   Right-click the button to modify, and then select **Edit customization** from the shortcut menu.
3   Select the new object to associate.
4   Click **OK**.

Remove the object associated with a button

To remove the object associated with a button:

1   Display the screen to which the button belongs (**Portfolio/ Computers**, for example).
2   Right-click the button to modify, and then select **Remove customization** from the shortcut menu.

Warning:

No confirmation is requested.

Additional information

The modifications carried out on a button are immediatley saved in the database. You do not need to use the **Administration/ Save the database configuration** menu.

The objects that are shown in the customization window are sorted by functional domain.

AssetCenter Database Administrator also enables you to:

- Add new buttons to screens
- Associate an object with a button

For further information, refer to:

- The **Administration** guide, **Customizing the database** chapter, **Customizing existing objects/ Customizing objects / Customizing a detail/ Buttons** section.
- The **Administration** guide, **Customizing the database** chapter, **Creating new objects/ Creating action buttons** section.

User configurations

By default, AssetCenter stores the user preferences (also called user configurations) in the **amSysConfig** table when they connect to the database for the first time. When a user modifies their preferences (options, window sizes, enabled modules, list and sub-list configurations, filters and views, etc.), the corresponding record is updated in the database.

To stop users from updating their configurations and define a default configuration:

- Create a user configuration that suits you by customizing AssetCenter. You will use this configuration as the standard configuration.
- Select the **Administration/ List of screens** menu.
- Select the **amSysConfig** table.
- Select and duplicate all records whose **Section** starts with **User**.

> ✎ Note:
>
> The purpose of performing this duplication is to keep the original user configuration.

- Create an action that sets the value of the **EmployeeId** in the **amSysConfig** table to 0. This step enables you to specify that that configuration is applied to **all** users. To do this:
  - Select the **Tools/ Actions/ Edit** menu.
  - Click **New**, define a **Name** for the action (for example, **Config**), select **amSysConfig** as the **Context** and **Script** as the **Type**.
  - In the **Script** tab, enter the following script:

```
Set [lEmplDeptId]=0
```

  - Finish the creation by clicking **Create**.
- Execute this action on the records duplicated previously.
- Define for all users, a read-only user right for the **amSysConfig** table.

Note:

For further information defining user rights, refer to the **Administration** guide, chapter **Controlling access to the database**.

Important:

This procedure is only valid for users that have not yet connected to the database, because they do not yet have a record in the **amSysConfig** table. If a user has already connected to the database, their preferences are stored in the table. The only way to cancel them and to force the default configuration is to delete the records corresponding to this user.

4 Searching for items in a table

CHAPTER

This chapter's objective is to teach you how to search for records with AssetCenter using filters.

You will learn how to:
- Use a filter wizard
- Distinguish the different types of filters available.
- Use the most popular filters.
- Apply several filters in cascade to narrow your search.

Query wizard (QBE)

A screen when opened can be prefiltered using a query applied from a wizard.

This wizard:
- Groups together the main fields used in a table
- Enables quick queries on one or more fields
- Can be edited and is fully customizable (**Tools/ Actions/ Edit** menu)

The tables that are prefiltered by default are the following:
- Employees

- Portfolio items
- Computers
- Work orders

In practice, all tables can be prefilitered.

Viewing data with a query wizard

Once the query is made, the table is filtered according to the criteria specified in the wizard.

To view all the data without any prefiltering:

- When the query wizard is displayed:
  - Click **Cancel**

    or
  - Click **Finish** without specifying anything in the query wizard fields.
- When using a prefiltered screen:
  - Close the screen and reopen it

Disabling the query wizard

To disable the query wizard when opening a screen:

- Change the value of the **Enable query wizards** field (**Edit/ Options/ Navigation** menu)

How query wizards work

Each time a user displays a screen, AssetCenter checks whether a query wizard is linked to the screen.

In order for this wizard to be called, its SQL name must be formed as follows:

- **searchscreen**, with **screen** as the screen name.

For example, when the **amAsset** or **amsysAsset** screens, which are associated with the **amAsset** table, are opened, the application looks for the **searchamAsset** query wizard (the **amAsset** screen designates a screen that can be modified by the user, the **amsyAsset** screen designates a system screen).

🖋 Note:

The functional domains of the query wizards are the same as the tables to which they are associated.

This behavior is not mandatory.

For further information on how a wizard workd, refer to Wizards [page 83] in this guide.

For further information on how to create a wizard, refer to the **Advanced use** guide, **Wizards** chapter, **Example of creating a query wizard (QBE)** section.

Example of using a query wizard

The Work Orders table (**Portfolio/ Work orders**) is automatically pre-filtered.

The query wizard enable you to make queries based on the most important fields of this table:

- Work order #
- Status
- Priority
- Type
- Expected resolution
- Filtering according to a work order number implies you can consult the work orders list.
- The expected resolution date is filtered according to four criteria: Before, After, Date, Except. These criteria are given as examples and can be modified.

How you use this wizard will depend on how the table has been populated and the working procedures you have implemented:

Overview of search filters

When you display a list of records (employees, for example), AssetCenter can display all the records in the list or just selected records. You use a filter to make this selection.
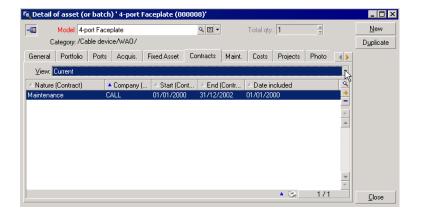
You can use several filters together whether the list is hierarchic or not.

Types of filters available

There are several types of filters:

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

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

- ✎ Query filter: This filter executes a query that you write yourself. The query allows you to combine several selection criteria, concerning information in the list or in linked tables.

- Specific filter: Some tabs in detail windows display a list of records (features or expense lines, for example). In some cases, AssetCenter proposes a drop-down list with filters specific to this list, which is integrated to the detail. The filter criteria enables the display of a selection of records from this list.

Figure 4.1. Specific filter on the valid contracts concerning an asset

Superimposing filters

Several different filters can be simultaneously applied to a list for a variety of reasons:

- Filters automatically applied according to the context: A combination of values taken from the fields in a detail define the display context. This automatically restricts the values proposed in the drop-down list of a linked field, for example. The user doesn't see explicitly that such a filter is being applied.
- Filters applied according to user-profile "Access restrictions": These criteria mean that a specific user will only see the record that corresponds to criteria defined by the query in their user profile. The user doesn't see directly that such a filter has been applied.
- Filters applied in the foreground on lists: simple filters, query, standard, specific. Defined elsewhere, these filters are accessed via the menu specific to the list displayed. The user clearly sees that such a filter is being applied.
- Filters applied in the background on lists: These filters are those which you can define in the **Filter (WHERE clause)** tab, accessible via the **Configure list** shortcut menu item. The user sees that such a filter is being applied since the 🔍 icon at the bottom right-hand corner of the list icon is colored in. (Clicking directly on this icon also takes you directly to the **Filter** tab.)

Operation of filters

- A filter's main task is to reduce the lines of a list, and not its columns.
- An arborescence of components and sub-components represent records in hierarchical tables. The records that satisfy filter criteria appear clearly while the others are grayed-out.
- The only way to save a filter applied to a main list is to save it as a view (using the **Tools** menu) that you can call on later.
- In certain cases, to apply a filter (or filters), you need to click one of the 🔘 icons that appear in the filter zones. If no such icon appears, the filter is applied automatically. If the icon appears in gray 🔘, it means that the filter is already applied. The icon appears normal again if you modify or add a filter condition.
- To update the filtering and take into account changes in the database, press F5 or use the **Window/ Refresh** command.

- When you apply several filters simultaneously, AssetCenter applies an "AND" condition (not "OR"). If a record is to be displayed while a filter is applied, it must satisfy all the conditions defined by the filters.
- In order to establish the logical conditions that define any filter, you have been provided with comparison operators.

Table 4.1. Comparison operators

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

✎ Note:

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

Using filters

You have two possibilities when filtering records:
- You can apply one or more filters in the foreground of a main list. The definition of these filters is visible to the left of the window containing the list.

- Or you can apply a query filter in the background to any list. The definition of this filter does not appear in the window displaying the list, but the 🖎 icon indicates the presence of the filter.

📝 Note:

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

Here are the filter-removal methods:
- To remove all applied filters on a list, use the **No filter** option in the shortcut menu or specific menu of the list being displayed.
- To disable one or more filters:
    1 Place the mouse on the filter-definition zone that you want to disable.
    2 Right-click to display the shortcut menu.
    3 Select **Remove this filter**.
- To remove an AQL query filter applied in the background, display the shortcut menu (right-click with the mouse) and select **Configure list**, then the **Filter (WHERE clause)** tab. Click the [×] button.

📝 Note:

AssetCenter displays the results of your queries as quickly as possible: If it can optimize this process, then the results will appear almost immediately, even if the database is extremely large. Otherwise, the time it takes to return results depends on the database engine used, the occupation of the network (local or client-server) and the size of the database.

Applying one or many simple filters

Simple filters apply only to main lists, which is to say in the foreground.
1 Display the list of records to filter.
2 Select the **Simple filter** command from the specific menu of the list (situated to the right of the **Edit** menu).

A definition zone appears in the upper left-hand corner of the list.

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

3   Select the object in the table with the filter using the drop-down list to the right of ▨.

4   Select a comparison operator from the drop-down list.

5   Enter a value with which to compare the object chosen from the drop-down list.

    If the linked table is hierarchical, then the **Trees in drop-down lists** option from the **Navigation** section comes into play. It displays a checkbox at the bottom of the list zone that, if selected, also filters the sub-components of the selected object.

6   Click ▣ to display the filtered records.

7   Repeat step 2 to apply another filter.
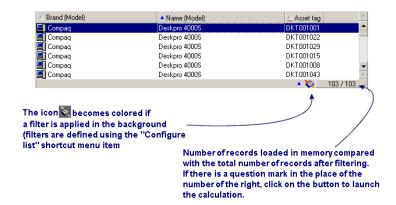
Applying query filters

1   Display and select a list.

2   Use the **Query filter** command in the specific menu or the shortcut menu to call up the filter-definition zone.

3   In the zone that appears, the first field presents a drop-down list of pre-existing queries from which you can select one.

    To define your filter criteria, enter directly the AQL expression of your query in the text zone.

    If you want AssetCenter to help you write your query, right-click in the list and select **Configure list** from the shortcut menu that appears. Or, for main lists, click the ▨ button in the filter-definition zone.

Figure 4.2. Query builder screen

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

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

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

4 Finally, click ⬚ to launch the filtering function.

5 Wizards

You can access the wizards using the **Tools/ Actions/ Edit** menu item. Then, select an action whose Type is **Wizard**.

Definition of a wizard

AssetCenter wizards help you perform simple and systematic tasks. They guide you step-by-step, in a graphic and intuitive manner, through the different phases necessary to perform a task. AssetCenter is delivered with predefined wizards that enable you, for example, to:

- Move users and assets from one location to another. The user chooses an employee - and the assets belonging to the employee - and moves them all to the new location. When all this information is supplied to the wizard, the location is updated for the employee and the assets.
- Manage stocks simply. The user selects assets in stock, an employee and a location. The wizard assigns the assets to the employee and the selected location.
- Collect information in order to execute any type of action.
- Facilitate record keeping.

> ✎ Note:
>
> In addition to containing standard wizards, AssetCenter enables you to create your own wizards.

Who are wizards intended for?

Wizards are useful for both novice users and advanced users.

- Using wizards, a novice user can perform complex tasks more easily and without needing an in-depth understanding of AssetCenter and its inner workings.
- The advanced user can create new wizards or tailor existing ones to suit the needs of the company's internal business processes. The creation of these dedicated wizards requires the use of a scripting language, which is both powerful and flexible.

Types of wizards

Wizards can be divided into two major groups:

- Wizards that exchange data with the AssetCenter database.
- Independent wizards.

Wizards that exchange data with the AssetCenter database

This group of wizards can be further divided into two sub-groups:

Data-entry wizards

These wizards make it easier to enter data into the database and create records from this data. For example, the "New Employee/Department" wizard guides you through the steps necessary to create a record in the Departments and Employees table. The information relating to the employee or department is collected by the wizard, which then creates the corresponding record. The user does not directly enter any information into the screen; the wizard does it all.

Data-collection wizards

Certain actions require the value of a field from the AssetCenter database or even the value of a variable. The wizards in this sub-group help you gather this information, then they pass it on to the action. For example, the "Move user" wizard collects data about the assets to move, the user of these assets and their new location. It then modifies the records corresponding to these items in the database.

Independent wizards
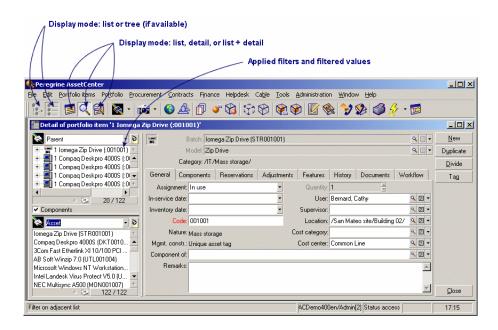
Independent wizards are essentially wizards that calculate or display items. You can, for example, create an "Addition" wizard that displays the sum of two numbers entered by the user.

6 Using views

This chapter explains how to use views with AssetCenter.

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

Figure 6.1. Items stored in a view

Definition of a view

A view lets you save the display parameters of a main list:

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

Creating a view makes it easier to produce the same report every time. Once you have displayed the view you can easily print it with the same presentation each time.

Examples

- 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 name of their users.

To create a view

1 To create a view, display the list as you want it to be memorized.
2 Save this view via the **Tools/ Views/ Create** menu from the current window.

⚠ Warning:

If you have modified one of the display parameters after displaying the list, you must first close the list, then open it again, before being able to create the view taking into account the lastest modified parameters.

This is due to the fact that list-display parameters are only displayed when the list is closed. Views are created using the saved parameters for the list.

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

To display a view

Select the view among the names of views displayed in the **Tools/ Views** menu.

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

The view is displayed using all the saved parameters.

AssetCenter displays a new window, even if a list with the same information is already displayed. The window title displays the name of the view.

📝 Note:

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

To delete a view

• 1st method:
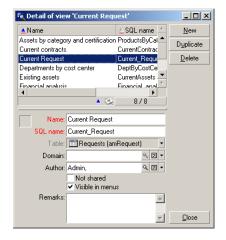
  1   Display the view.
  2   Then delete it using the **Tools/ View/ Drop current view** menu item.
• 2nd method:
  1   Select the **Tools/ Views/ Edit** menu item to display the table of views.
  2   Select the view you want to drop.
  3   Click **Delete**.

To modify a view

  1   Display the view on screen.
  2   Modify your display parameters.
  3   Save your modifications using the **Tools/ View/ Modify current view** menu item.

To edit a view (administrator function)

Using the **Tools/ Views/ Edit** menu item, the administrator can access the list of all existing views:

The administrator must assign a value to each one of the fields in the detail of the selected view.

- Name: Name the view
- SQL name: Name the view according to the SQL conventions.
- Table: Name the table to which the view applies.
- Domain: Associate a functional domain to the view. You choose this domain from the Functional domains table, because it is a link.
- Author: Designate the author of the view. You choose this author from the Employees table, because it is a link.
- Not shared: If this option is selected, the view is only available for the person who created it.
- Visible in menus: If this option is selected, the view is accessible via the view names in the **Tools/ Views** menu and via the 🖼 button.

Associating a view with a button in a screen

There are several ways to associate a view with a screen button.

For further information, refer to:

- This guide, section Customizing buttons [page 69].
- The **Administration** guide, **Customizing the database** chapter, **Customizing existing objects/ Customizing objects/ Customizing a detail/ Buttons** section.
- **Administration** guide, **Personalization of the database** chapter, **Creating new objects/ Create an action button** section.

7 Planner viewer

Overview

What is the planner viewer?

The planner viewer is a representation of the events having a start, an end and possible deadlines.

These events relate to an individual record or a selection of records.

Examples:
- Employee absences
- Periods covered by contracts

The pages of the planner viewer only represent simple data (start, end and possibily deadlines).

They do not provide any sophisticated scheduling functionality.

When the planner viewer is shown by default

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

- **Departments and employees** (amEmplDept): The **Preview of abs.** tab lets you view absences.
- **Work orders** (amWorkOrder): The **Preview** tab lets you view scheduled work orders.
- **Contracts** (amContract): The **Preview** tab lets you view scheduled work orders under contract.
- **Projects** (amProject): The **Preview** tab lets you view projects.

When a planner viewer page can be added

A planner viewer page can be added to:
- The detail of a table using AssetCenter Database Administrator.
- A wizard using AssetCenter.
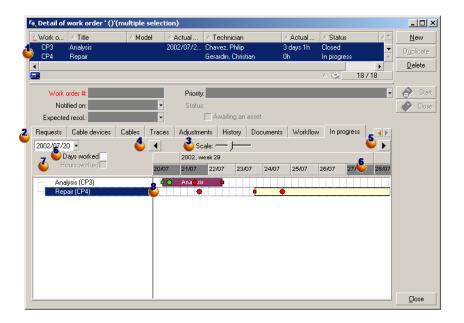
This is only true if you have at least the following information:
- A field storing a start (either the date or the date and time).
- A field storing an end (either the date or the date and time).

Using the planner viewer page

Figure 7.1. Planner viewer - layout

🔴 Start by selecting all the records whose schedules you want to view.

🔴 Select the first date to display in the frame 🔴 (left-hand side of the time axis).

🔴 To modify the time scale: Drag the slider left or right, or click either side of it, or activate the 🔴 frame then press **Ctrl** while turning the mouse wheel.

🔴 To move the time scale left (to go back in time): Click ◄ or activate the 🔴 frame then roll the mouse wheel upwards.

🔴 To move the time scale right (to go forward in time): Click ► or activate the 🔴 frame then roll the mouse wheel downwards.

🔴 Select the option **Days worked** to hide the days not worked. The days not worked appear in gray on the time axis. The **Days worked** option can only be selected if the scale 🔴 allows it.

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

⚙ Graphical representation of events relating to the records selected in the list ⚙:

• A bar ▭ represents the period between the start and the end of an event.

  The fields used to define the start and the end of events depend on what was defined for the planner viewer page.

  When you positon the pointer over the bar ▭, a ToolTip is displayed to provide key information about that event.

  To move the bar ▭ without changing its size (i.e. without changing the duration of the event), select the bar with the mouse and move it. You'll notice that the start and end dates change but the duration stays the same.

  To just modify the start date, position the pointer over the left-hand border of the bar ▭. The pointer changes appearance and becomes a size pointer. Now drag the pointer to resize the bar. You'll notice that the end date stays the same.

  To just modify the end date, position the pointer over the right-hand border of the bar ▭. The pointer changes appearance and becomes a size pointer. Now drag the pointer to resize the bar. You'll notice that the start date stays the same.

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

  To display the detail of an event in a new window, double-click ▭.

  When the table structure allows it, you can drag an event from one line to another. In the example given in the Planner viewer - layout [page 95] diagram, this would mean reassigning the work order to another technician.

• The red circle ● and green circle ● represent deadlines when deadlines are defined in the planner viewer page. This is the case, for example, with work orders (**Expected resol.** field (dtResolLimit)). This is not the case, for example, with employee absences.

  A circle is red when the deadline it represents is not respected.

  It is green when the deadline is respected.

• The red square ▪ and the green square ▪ indicate a deadline. Each square is associated with a circle of the same color.

The square is to the left of the bar ▭ if the deadline is defined with regards to the start of the event.

The square is to the right of the bar ▭ if the deadline is defined with regards to the end of the event.

A square is red when the deadline it represents is not respected.

It is green when the deadline is respected.

- The green triangles ▸ and ◂ indicate an event that does not appear in the frame beacause of display parameters.
- A red square ▭ defines the overlapping zone of two events.
- A green bar ▬ indicates the progress percentage of an event.

> ⚠ Warning:
>
> The progress bar is only displayed when the bar ▭ is fully contained within the screen.

Practical case

The following practical case shows you how the planner viewer works.

Outline of the practical case

The practical case will take you through the following operations:
1 Creating the first group.
2 Creating two technicians.
3 Creating two work orders.
4 Viewing the key dates of these work orders.
5 Graphically modifying certain key dates.

Step 1 - Create the group

1 Launch AssetCenter.
2 Connect to the demonstration database.
3 Display the list of groups via the **Portfolio/ Groups** menu.
4 Create a group by only populating the following fields:

Name of the field	SQL name of the field	Value
Name	Name	CP - Group

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

Step 2 - Create the technicians

1 Display the list of employees via the **Portfolio/ Departments and employees** menu.

2 Create 2 employees by only populating the following fields:

Tab	Name of the field or link	SQL name of the field or link	Value for work order 1	Value for work order 2
	Name	Name	CP - Technician 1	CP - Technician 2
Groups	Group members	EmplGroups	CP - Group	CP - Group

3 Close the window with the **Close** button.

Step 3 - Creating the work orders

1 Display the list of work orders (**Portfolio/ Work orders** menu).

2 Create two work orders. Only populate the following fields:
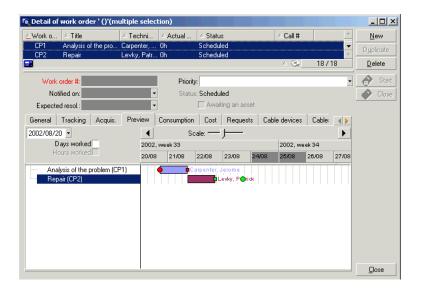
Tab	Name of the field	SQL name of the field	Value for work order 1	Value for work order 2
	Work order #	WONo	CP1	CP2
	Notified on	dtNotif	08/19/2002 11:00:00	08/19/2002 11:00:00
	Expected resol.	dtResolLimit	08/20/2002 17:00:00	08/23/2002 17:00:00
General	Type	seType	Internal maintenance	Internal maintenance
General	Title	Title	Analysis	Repair
Tracking/ Technician	Technician	Contact	CP - Technician 1	CP - Technician 2
Tracking/ Scheduling	Planned start	dtSchedFix-Start	08/20/2002 14:00:00	08/21/2002 14:00:00

Tab	Name of the field	SQL name of the field	Value for work order 1	Value for work order 2
Tracking/ Scheduling	Planned end date	dtSchedFixed	08/21/2002 12:00:00	08/22/2002 17:00:00

Step 4 - Viewing the schedule of the two work orders

1 Select both work orders **CP1** and **CP2**.

2 Select the **Preview** tab.

Figure 7.2. Planner viewer - Example with work orders

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

You can also enable the 🖱 frame then press the **CTRL** key while turning the mouse wheel, instead of using the **Scale** slider.

You can also use the mouse wheel instead of using the ◀ and ▶ buttons.

Here is how you to read the page:

• The bars ☐ represent the period between the planned start (dtSchedFixStart) and planned end (dtSchedFixed) of the work order.

Its color depends on which work order you select.

- The red circle ● and green circle ● represent the deadlines (**Expected resol.** field (dtResolLimit)).
- The red square ▪ and the green square ▪ indicate a deadline.
- The circle ● and the square ▪ of the work order **CP1** are read because the planned end date (dtSchedFixed) of the work order comes after the expected resolution date (dtResolLimit).
- The circle ● and the square ▪ of the work order **CP2** are green because the planned ending date for the work order comes before the expected resolution date (dtResolLimit).

Step 4 - Graphically modifying the dates

1 Display the list of work orders (**Portfolio/ Work orders** menu).

2 Select both **CP1** and **CP2**.

3 Select the **Preview** tab.

4 Select the bar ⬚ of **CP1** with the mouse and move the entire bar.

   You must confirm this modification using the **Modify** button.

   You'll notice that the **Planned start** and **Planned end** dates get modified.

5 Position the pointer over the left-hand border of the bar ⬚ of **CP2**. The pointer changes appearance and becomes a size pointer. Now drag the pointer to resize the bar.

   You'll notice that the **Planned start** field gets modified but the **Planned end** field stays the same.

6 Doucle-click the ⬚ bar; A new window with the work order detail is displayed.

Customizing how the planner viewer pages work

The options governing how all the planner viewer pages work are defined via the **Edit/ Options** menu. Then go to **Display/ Planner tools**.

🖊 Note:

The fact that only Saturday and Sunday can be declared as unworked days cannot be changed.

8 Printing data

This chapter explains how to print data with AssetCenter.

Using the **File/ Print** menu item or the "Ctrl+P" keyboard shortcut, you can print any main list or some of its selected records - filtered or not - keeping the column configuration that you have chosen.

AssetCenter enables you to choose from two printing formats:

- Internal forms: The list and detail templates for these forms are located in the Forms table.

  Access this table via the **Tools/ Reporting/ Forms** menu in order to create, modify or delete forms (see the chapter **Forms** in the **Advanced use** guide).

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

  You can access this table to consult the available forms via the **Tools/ Reporting/ Reports** menu. If you want to add new forms, however, you need to have the Crystal Reports application installed. This offers more powerful reporting functionality than the internal forms. (See the chapter **Crystal Reports** in the **Advanced use** guide.)

Printing information from a list

1 Display the main list.

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

3 Choose the type of form you want to use from among the four values appearing in the drop-down list **Type**:

- Detail forms (internal): This prints information from the main list or from selected records in the list based on a detailed template.

  In the **Form** field of the Forms table, AssetCenter proposes detail-type forms relating to the main list from where you printed. These forms define the contents and the look of the printed copy.

- List forms (internal): This prints information from the main list or from selected records in the list according to a template.

  In the **Form** field of the Forms table, AssetCenter proposes list-type forms relating to the main list from where you printed. These forms define the contents and the look of the printed copy.

- Detail reports (Crystal): This prints a record from the main list according to a detailed template.

  To print the detail of several records, you must repeat the printing steps for each record. In the Printing window that appears for this step, AssetCenter offers you a choice of reports to choose from in the **Form** field; all these reports bear a reference table. This being the case, a report will not appear in this field unless you have already populated the **Table** of that report's detail (in the Reports table). Having done so, you will see the reports concerned by the main list from where you launched the printing function. These reports define the contents and form of the printing.

- Non-contextual reports (Crystal): This enables you to choose from among all the report templates the one which you want to print.

  The printing process has nothing to do with the context defined by the main list, if one has indeed been selected. In the Printing window, AssetCenter offers you a choice of reports to choose from in the **Form** field; contrary to the Detail reports, none of these reports bear a reference table. This being the case, the **Table** of that report's detail (in the Reports table) must be empty. If it is not empty, then you will not see the reports concerned by the main list from where you launched the printing function. These reports define the contents and form of the printing.

4 Choose a form from the drop-down list in the **Form** field.

5 Click **Print**.

Printing the detail of records

Before printing record details, (the **Type** field must by set to **Detail form (internal)**), you are prompted to select a printing option:

- Page break between records: prints the detail of each record on a new page.
- Continuous printing: prints record details one after another; no page breaks.
- Labels: prints record details as labels spread out over the page, according to the following parameters:
  - Number of labels in height
  - Vertical separation: Spacing, in millimeters, between two lines of labels.
  - Number of labels in width
  - Horizontal separation: Spacing, in millimeters, between two columns of labels.

📝 Note:

If you only select one record, these ordering parameters will not be available, since they will obviously not be necessary.

Print preview

For a print preview, click **Preview**.

The print preview window enables you to:

· Change the target printer (**Configure** button).

· Change the margins and zoom factor of your form (**Page setup** button).

· Print your data (**Print** button).

· Display the other pages of the form (**Previous** and **Next** buttons).

9 Get-Answers

Integrating Get-Answers in AssetCenter enables you to search the Get-Answers knowledge base based on the selected text in a field.

Warning:

The integration will only be functional if the user has local administrative rights on the client computer.

This integration is available in Get-Answers versions 4.0 and higher. The following steps will enable you to use the integration:

1 Find the **jcinst.exe** program on the Get-Answers server, and then copy and execute this file on each client that will access Get-Answers. This file is usually located in the following folder:

```
c:\Program Files\Peregrine\Common\Tomcat4\webapps\oaa\integrations\
```

2 Follow the installation instructions given by the program.

3 Start your web browser with the following address:

```
http://<Get-Answers server>/oaa/login.jsp?_bookmark=e_answers_kmSea
rchAlternate_basicSearch.jsp?DDEType=SC
```

4 The integration is set up.

The integration is carried out by a DDE script that launches Get-Answers each time you select **Search in Get-Answers** from AssetCenter.

To obtain information from the Get-Answers knowledge base:

1 Highlight the text in a field about which you would like more information.

2 Perform one of the following actions:

- Click

    ✎ Note:

    This icon needs to already have been added to the toolbar using the **Tools/ Customize toolbar** command.

- Select **Search in Get-Answers** from the **Helpdesk** menu.

3 Wait for Get-Answers to appear.

4 Select one of the solutions proposed by Get-Answers.

5 To recover this solution from the Clipboard, perform one of the following actions in AssetCenter:

- Click

    This icon must be added to the toolbar, if you haven't done it already, using the **Tools/ Customize toolbar** menu item.

- Select **Recover from Get-Answers** from the **Helpdesk** menu.

10 Reference information

Connections

To create a connection to a database

1 Select the **File/ Manage connections** menu.
2 Click **New**.
3 Populate the **Connection** tab:
   1 Enter the connection **Name** that appears in the **Connect to a database** dialog box.

      This name is also used to launch AssetCenter and execute an export script from an MS-DOS command prompt.
   2 You can use the **Description** field to briefly describe the connection.
   3 Select the database engine from the drop-down list in the **Engine** field.

      The values are IBM Database Universal Server, Microsoft SQL Server, Oracle, Sybase SQL Anywhere, Sybase SQL Server.
4 Enter the information according to the engine that you selected.

- ODBC **Data source**, which enables you to access a database (IBM Database Universal Server, Microsoft SQL Server or Sybase SQL Anywhere).
- Oracle or Sybase SQL Server **Server** name, on which the database is stored.
- **Database** is the name of the ODBC connection (IBM Database Universal Server or Microsoft SQL Server) or the name of the database (Sybase SQL Server).
- **User** is the name of the Login that identifies you when you access the database (IBM Database Universal Server, Microsoft SQL Server or Sybase SQL Anywhere).
- **Oracle account** name, used for the connection; it serves as a login.
- **Sybase account** name (Sybase SQL Server), used for the connection; it serves as a login.
- **Password**
- **Owner** of the database. Prefixes the SQL commands sent to the database.

5   Click **Create**.

You can create several connections to the same database if you assign each one a different name. The **New** or **Duplicate** buttons enable you to create these connections.

You can use the **Test** button to:
- Test the connection to the database.
- Check that the database is compatible with the current AssetCenter version.
- Create a database from an empty shell (built with a DBMS).

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

Comments
- The **Owner** field allows you to authorize database logins (the **User** field) not belonging to the tables. In this case, all SQL statements sent to the database are prefixed. For example, if the database owner is "Joe", the SQL statement "select a from b" becomes:

```
SELECT Joe.a FROM Joe.b
```

🖋 Note:

The **File/ Manage connections** menu item does not allow you to create a
database. You must use AssetCenter Database Administrator.

To delete a connection to a database

This action does NOT destroy the database.

1 Select the **File/ Manage connections** menu.
2 Select the connection to be deleted.
3 Click **Delete**.

Performance of AssetCenter

If you use AssetCenter on a low-speed network, some items (images in
particular) might take awhile to be displayed.

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

How it works

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

To create a cache

1 Use the **File/ Manage connections** menu to display the list of connections.
2 Select an existing connection, or create a new one.
3 In the **Cache** tab, select the **Enable disk cache** check box.
4 Use the 🔲 for cache button to select the **Local folder for cache**.

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

Actions

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

You can define actions at any time using the **Tools/ Actions/ Edit** menu item.

Type of action

There are several types of actions:

- Executable
- DDE
- Messaging
- Script (modifies an object in the database)
- Wizard
- Printing

Wizard-type actions

Wizards contain a succession of pages, each one of them displaying information or requiring a user to enter data or make a selection.

Navigating between the different pages of a wizard is simple:

- Once the page is populated appropriately, you can continue to the following page (determined by a transition) by clicking the **Next** button. This button does not appear on the final page.
- You can always go back to make any corrections by clicking the **Previous** button.
- You can execute the final action of the wizard at any given moment by clicking the **Finish** button. If the wizard does not have sufficient information in order to perform its task, the appropriate page is displayed.
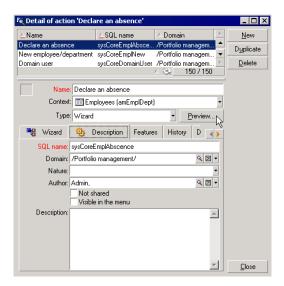
You can cancel the execution of a wizard completely (and as a consequence, its associated action) by clicking the **Cancel** button.

Executing an action

You can execute an action in one of several ways:

- Clicking the button on the toolbar:

  The drop-down list displays the names of the available actions that you can choose from. Clicking launches the same action again. If this action still exists, the icon associated with it replaces the button on the toolbar.
- Using the **Tools/ Actions** menu item.
- From the preview of an action:
  1. Select the **Tools/ Actions/ Edit** menu to view the list of actions.
  2. For an action whose **Context** field (SQL name: ContextTable) indicates a table of reference, click **Preview**.

  3. In the window that appears, choose the **Context** of application of this action from among the records in this table proposed by the drop-down list.
  4. Click **Execute**.

- From the shortcut menu (accessible by right-clicking): If at least one action is available for the open table, the **Actions** entry is shown in the shortcut menu.

  Only certain information zones offer this menu entry in their shortcut menu. We suggest that you memorize these zones during your use of AssetCenter. They are usually associated to certain fields of certain details.

Tip:

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

Example

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

Messages

The different users of AssetCenter can exchange messages with each other.

You can access messages addressed to you in the list of messages accessible via the **Tools/ Messages** menu.

The **Referenced object** button enables you to directly access the record concerned by the message. For example, if the message indicates that a new purchase request has been submitted to you for validation, clicking the button enables you to directly access the request detail.

Test for new messages

You are informed of any new messages at each test period, defined in the **Messages** option of the **Edit/ Options** menu item.

Upon connection to the database, if there are any unread messages - such as those received before your connection - a dialog box asks if you want to read them.

During the course of your session, if you receive new messages a dialog box is displayed asksing you if want to read them.

History

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

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

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

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

Alarms

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

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

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

AssetCenter users can create alarms at 1 or 2 levels. Each alarm level defines a deadline and an action, which is triggered at this moment.

In the case of two-level alarms, triggering the second level depends on the first-level action.

- If the first-level alarm triggers an action other than the sending of a message via 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.

Keyboard shortcuts

Executing certain functions can be facilitated by the use of keyboard shortcuts. Here is a summary:

Table 10.1. Using keyboard shortcuts

Shortcut	Equivalent menu command	Context	Result
Navigating in lists			
F12 or Down arrow	**Edit/ Next record**	Cursor placed in a list or detail window.	Next record (taking any filters and sorts into account).
F11 or Up arrow	**Edit/ Previous record**	Cursor placed in a list or detail window.	Shifts the selection to the previous record (taking any filters and sorts into account).
Ctrl + F11 or Home	**Edit/ First record**	Cursor placed in a list or detail window.	First record(taking any filters and sorts into account).
Ctrl + F12 or End	**Edit/ Last record**	Cursor placed in a list or detail window.	Last record (taking any filters and sorts into account).
Previous page	Does not apply.	Cursor placed in a list or detail window.	Moves up one page in the list (taking any filters and sorts into account).
Next page	Does not apply.	Cursor placed in a list or detail window.	Moves down one page in the list (taking any filters and sorts into account).
Ctrl + G	**Go to** shortcut menu command (right-click)	Cursor placed in a list window, list sorted on the column in which you are searching for a value.	Searches the first record (taking any filters and sorts into account) starting with the letters entered in the search box.
Displaying list and record details			
F6	**Window/ List only**	Cursor placed in a list or detail window.	Displays the list only.

Shortcut	Equivalent menu command	Context	Result
F7	**Window/ Detail only**	Cursor placed in a list or detail window.	Displays the detail only.
F8	**Window/ List and detail**	Cursor placed in a list or detail window.	Displays both the list and detail.
F4	🔍	Cursor placed in a list or detail window.	Displays the detail of the linked record.
F9	Does not apply.	Cursor placed in a list window.	Modifies the width of columns in order to fill the exact width of the window. The space taken up by each individual column remains in proportion with the other columns.
Ctrl + F9	Does not apply.	Cursor placed in a list window.	Adjusts the width of columns according to the width of the largest item of text contained in the column (for those records loaded in memory).
Ctrl + Page up	Does not apply.	In a detail screen.	Places the focus on the previous tab.
Ctrl + Page down	Does not apply.	In a detail screen.	Places the focus on the next tab.
Alt + Enter	**Configure object**	On a field or link in a detail screen.	Displays the object configuration screen.
Insert	**New** button	Cursor placed in a list window.	Creates a new record.
Delete	**Delete** button	Cursor placed in a main list window.	Deletes the selected record(s)
+ and -	Unfold	In a tree-view list.	Unfolds or folds the current branch of the tree.
/ and *	Unfold	In a tree-view list.	Unfolds or folds all the branches of the tree.
Escape key			
ESC	**Close** button	Cursor placed in a list or detail window.	Closes the window if no modifications have been made. Otherwise offers to save modifications before closing.

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

Shortcut	Equivalent menu command	Context	Result
Ctrl + ;	Does not apply.	Cursor placed in a "Date" or "Date and time" type field.	Inserts the current date and time of the machine.
Data			
F5	**Window/ Refresh**	Cursor placed in a list or detail window.	Updates the detail and/or list.
Ctrl + F5	**Tools/ Refresh caches**	All contexts.	Refreshes the caches.
Wizards			
Shift + F9	Does not apply.	All contexts.	Launches the wizard debugger.

Error messages

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

The error message window contains a **Save** button, which allows you to save the error message as a file.

You can also copy the error message to the Clipboard by clicking **Copy**.

Index

U

V

W