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Asset DB Auditor User Manual

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1 Getting Started

There are three ways to begin using Asset DB when first opened.

1.1 Creating a New Project

To create a new project from scratch select File > New > Project¹.

1.2 Importing an Existing Project

If an Asset DB project file or a project xml file has been supplied and is saved elsewhere on your PC, go to File > Import > Project² and navigate to the supplied file. Asset DB project files have the extension '.atd' and xml project files have the extension '.zip'.

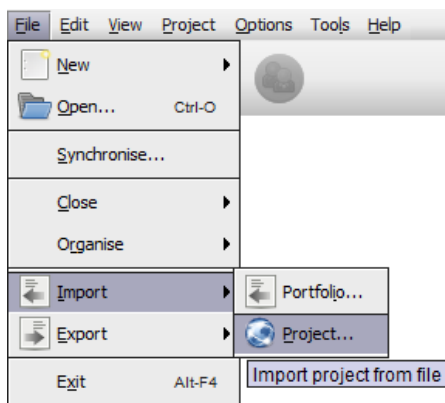


Figure 1. Import > Project

Note: Import Project should only be used for loading new or backup project files rather than each time the application is used. For day to day use of an existing project, use Open Project instead.

¹ Create New project functionality is not available with all licence types

² Import of .atd files is not available with all licence types



1.3 Opening an Existing Project

Go to File > Open or click the Open Project button at the top left to open a pop-up containing the list of available projects. Select the desired project from the list and click “OK” to open.

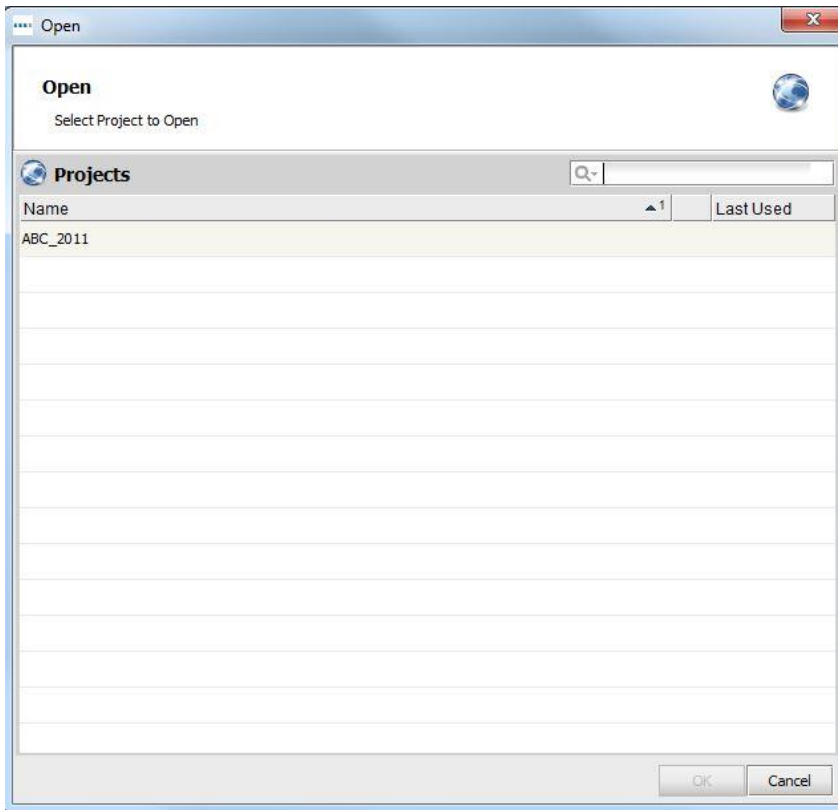


Figure 2. Open Project

You can sort the “Name” and “Last Used” columns by clicking in the header. You can also search for a project using the search bar in the top right.

If you have a TCO Analysis, Green Calculation, or Solution linked to a project, you can simultaneously select it along with the project and open both together at the same time if your licence level permits this. Please refer to the Analyst or Architect Manual for further assistance.

2 Workspace Overview

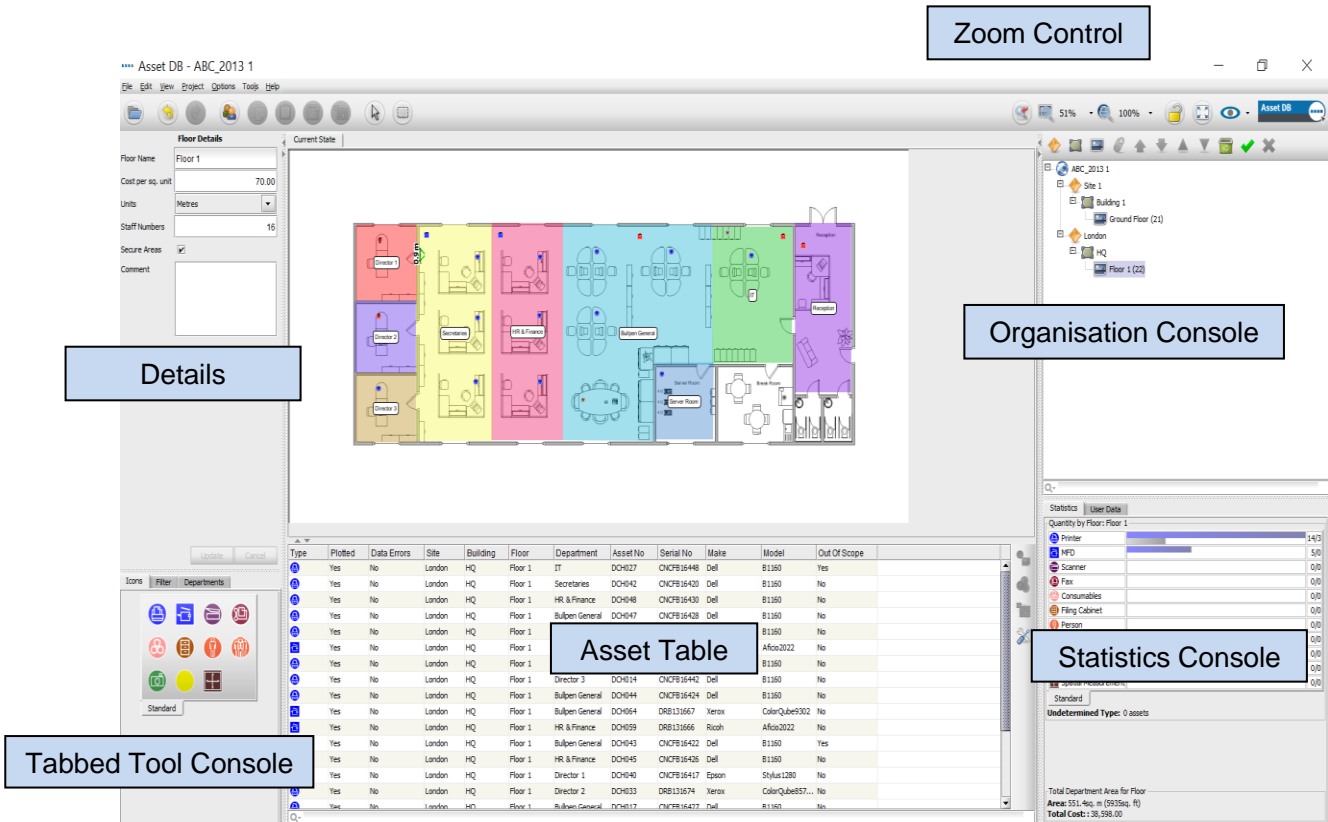


Figure 3. Workspace overview

3 Font Scaling

To optimise the Asset DB interface for different screen resolutions go to Options >Font Scaling and select the amount you want your font to increase. Once selected, a pop-up window will appear advising you that the changes will only take effect once Asset DB is restarted.

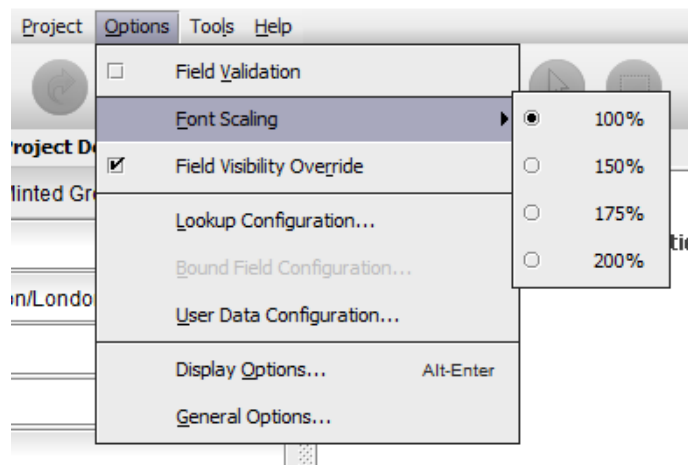


Figure 4. Font Scaling



4 Language Settings

Go to Options >General Options and select the Language tab in the pop-up. You will then be able to change your Asset DB language here. Changes will only take effect once Asset DB is restarted.

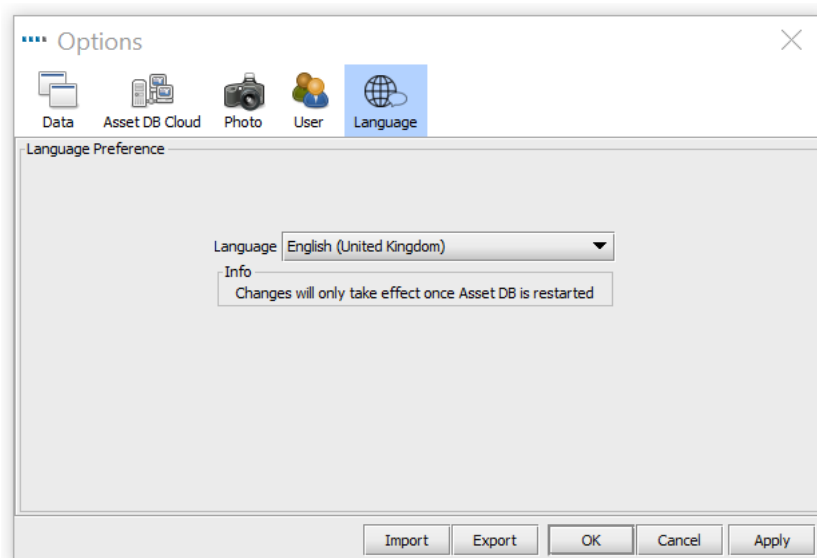


Figure 5. Language Selection

5 Project Structure

5.1 Creating a project structure

The console to the top right of the floor workspace is used to build the logical structure of your organisation as shown in Figure 3. An organisation is represented as a tree of objects comprised in hierarchical order of project, site, building, and floor. To add a new object, simply select the parent object in the tree then click the appropriate button found in the toolbar above the tree. For example, to add a new building to a site, click the site to which you wish to add a building, then click the Add Building button in the toolbar, see Figure 6.

The tool bar at the top of the Organisation Console has several functions. Other than adding sites, buildings, floors you can also attach floor plans, move objects up and down, sort objects in ascending or descending order and mark sites, buildings and floors as complete.

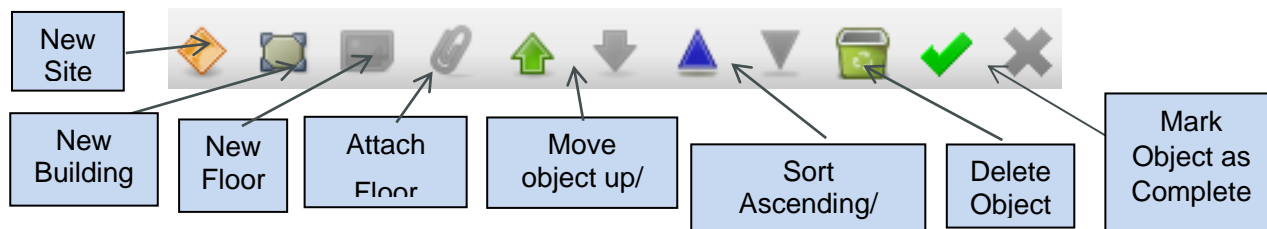


Figure 6. Project organisation tree actions



Within the Project Tree, you will see the hierarchical organisation of floors within a building, buildings within a site and sites within a project. If you choose to insert a secondary object within a parent object, this object will appear directly below the selected object and not directly at the bottom of the list. This will be the case whether inserting a site, building or floor (see Figure 7).

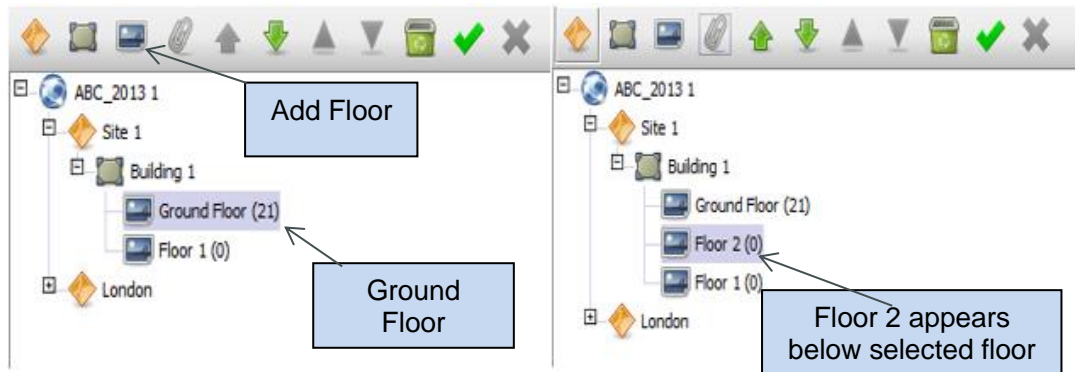



Figure 7. Inserting secondary objects

To sort objects in the list, use the green arrows to move objects up or down. To sort within a parent object you can use the blue triangle icons to sort child objects alphabetically, e.g. to sort floors within buildings or buildings within sites, etc.

5.2 Searching within the project structure

Searching for objects within the Organisation Console is possible through the search bar located at the bottom of the console (see Figure 8). By default, the search will run on the object name but you can choose to include other data fields in the search by clicking the search button  to the left of the search field, selecting the level for which you would like to include more data fields and then ticking the fields you would like to be included in the following pop-up (see Figure 9).

Note: the search acts as a filter and will hide objects from view. In order to show all sites, buildings and floors again you must clear the search bar using the grey cross icon to the right of the search field (see Figure 8).

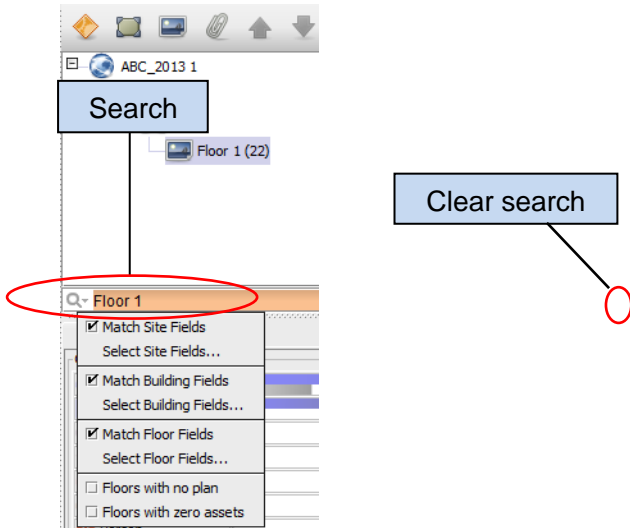


Figure 8. Search

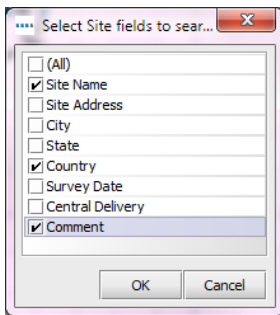


Figure 9. Select Site fields to include in search

Once a new object has been added to the tree, its details may be changed in the console at the top left hand side of the screen.

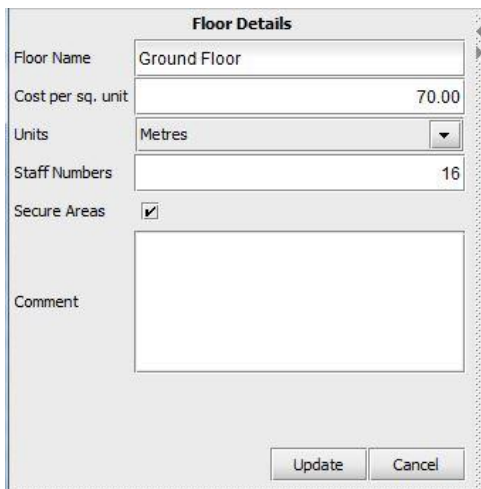


Figure 10. Floor Details



At floor level, digital images of floor plans may be attached by selecting the paperclip icon (see Figure 6). Should the floor or other level be added in the wrong place in the organisational tree, it may be repositioned up or down within that level using the arrow buttons or deleted entirely using the Delete button (also in Figure 6).

5.3 Marking project tree elements as complete or incomplete

In the project tree, it is possible to select sites, buildings, and floors and then to mark them as complete.

This might be a good idea when different parts of the project have been assigned to different people (see section 22 for more details), in order to have an overview as to how much work has been done so far.

To mark an element as complete, simply select it in the project tree and then click on the green



tick in the Project Tree console (see Figure 8). The element will then show a green tick next to it. Once synchronised with the Asset DB Cloud (see section 22), these changes can then be downloaded by other users. If an element has erroneously been marked as complete, the green tick can be removed by selecting the element in the project tree and then clicking on the red cross



5.4 Assigning Sites, Buildings and Floors

Once you have connected to the Asset DB Cloud and synchronised your project (See section 21), you have the possibility of assigning a name to each site, building, and floor. This facilitates collaboration between several people on a same project by making it clear who should be working on which element.

To do this you need to double click on a site, building or floor in the project tree and a second line will become visible in which you can enter a person's name. (See Figure 11)

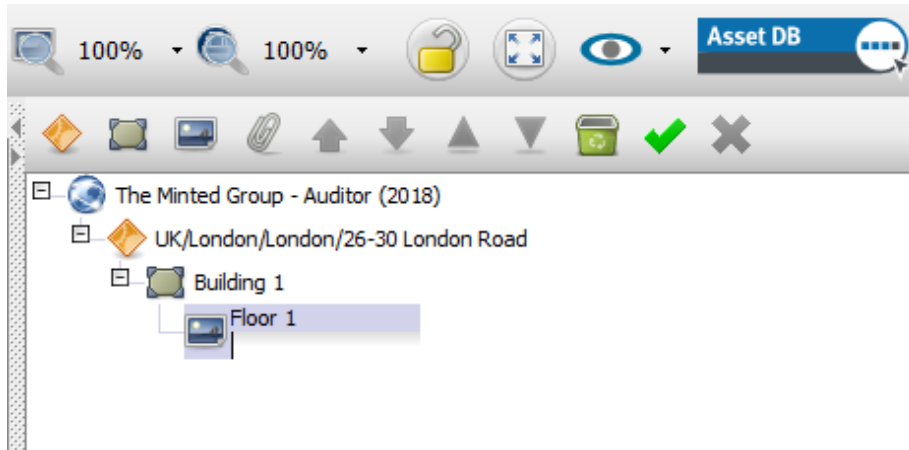




Figure 11. Assigning a Floor

Once a name is entered, hit ENTER and it is saved. If anyone else is working on the project simultaneously and is also connected to the Asset DB Cloud, they will see these updates instantly.

Please note that when you duplicate a project with assignments in the Project Tree, then these assignments will be lost as they are stored on the server and not in the project itself.

5.5 Project Contacts

Contacts are project specific and are synchronised to the Asset DB Cloud when the project is. Project contacts can be added in several ways:

The first is to use the  button. This will open up a dialogue box in which a list of contacts can be added. To create a new contact, click the  button, fill in the required fields then click Add. To edit a contact, select them in the list, make the necessary changes then click Update.

The second way of adding contacts is to do it directly from the “Contact” field. Clicking on the magnifying glass will bring up the list of existing contacts with at the top of it, the option to add new contacts. This will open the dialogue box shown in Figure 12.



.... Add Contact

Contact Details

First Name

Last Name

Email Address

Phone Number

First Name, Last Name, and Email address is required

Create Cancel

Figure 12. Add Contact

Fill in the contact details then click “Create”.

Once a list of contacts has been set up, they can be assigned to buildings or assets. The latter requires the default icon customisations to be modified to include “Contact” fields (see section 18).

To assign an existing contact, start typing the contact name, email or phone number in the Contact field and then pick from the drop-down list.

5.6 Required Format for Floor Plans

Asset DB requires that scanned floor plans are size A3 with a resolution of 300dpi and 8bit colour depth or less. The floor plan must not be any larger than 2400 x 1700 pixels. These settings are optimal for speed of navigation and essential to the successful addition of floor plans. Floor plan images larger than the maximum size cannot be added.

Supported file formats are:

- PNG (preferred format for computer generated images)
- JPEG (preferred format for scanned images)
- TIFF
- GIF

The optimal format is a computer generated PNG of less than 2MB per floor. If your floor plan is above the recommended size, Asset DB will automatically scale this image to the maximum recommended size. It is essential that the floor plan match the sizing criteria laid out above for it to be successfully added to your project.



Adding a floor plan to a floor that already has assets plotted (see section 9) may cause assets to be misaligned with the new floor plan or be un-plotted if they fall outside the boundaries of the new floor plan. If this occurs, you will be warned via the pop-up in Figure 13.

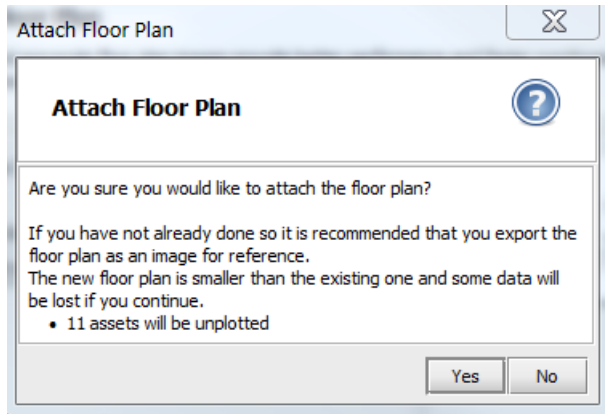


Figure 13. Attach Floor Plan warning

5.7 Making Changes to Floor Plans in Asset DB

After selecting a floor plan to import, there will be a pop up with options for adjusting your floor plan.

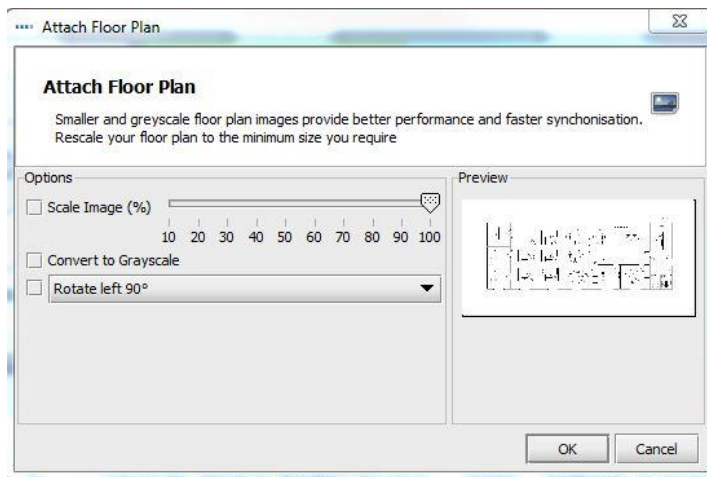


Figure 14. Attach Floor Plan dialogue

Here you have the option to decrease the image size, convert your floor plan to grayscale or rotate it. These changes should be made before you plot any icons on the floor, as the icons will not rotate or scale with the floor plan.



6 Scaling Floor Plans

To be able to measure distances, the floor plan must be drawn to scale and you must set the scale using the Scale Floor tool. To scale the floor plan you will need to know the length in feet or metres of a particular section on the floor plan. Typically this would be the length of a wall or partition or the width of a doorway.

To set the scale of the floor plan use either Project > Scale Floor > Scale Floor Plan (Ctrl+Shift-S) or use the “Scale Floor Plan” button at the bottom of the Statistics tab.

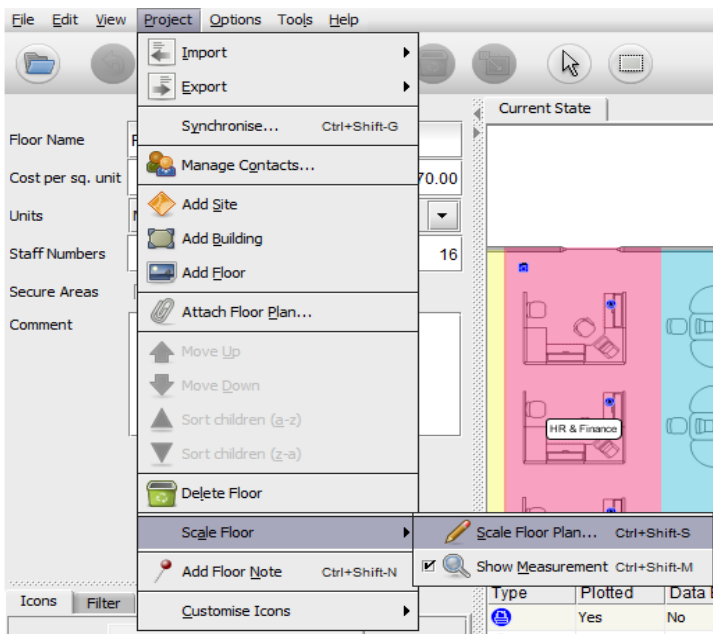


Figure 15. Select the Scale tool

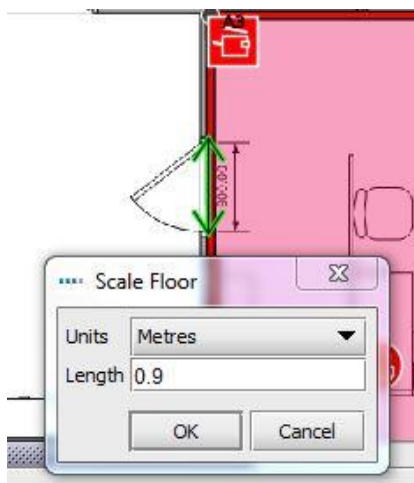


Figure 16. Enter a scale for the line drawn

Once selected, your cursor will appear as crosshairs. Click to place the start point of the object you are using to scale the floor. At this point your cursor will create a double ended arrow. Find your end point, and click again to complete the arrow. Once your scale line is drawn use the pop-up dialogue to define the length of that line in feet or metres.

Top tip: Standard doorways are typically 0.9 metres or 3 feet in width.

To verify that you have set your scale correctly, use the Measure Tool as described in section 7.

The measurement will remain on the floor. You can toggle the green measurement arrow on and off by using Project > Scale Floor > Show Measurement (Ctrl+Shift-M). This will show or hide the arrow and measurement that was entered as shown in Figure 17.

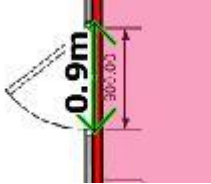


Figure 17. Show scaled floor measurement



7 Measurement Tool

The measurement tool allows you to measure distances from one point to another point on a scaled floor plan and also a circular radius around the measurement. This is dependent on setting a scale for the floor (described in section 6).

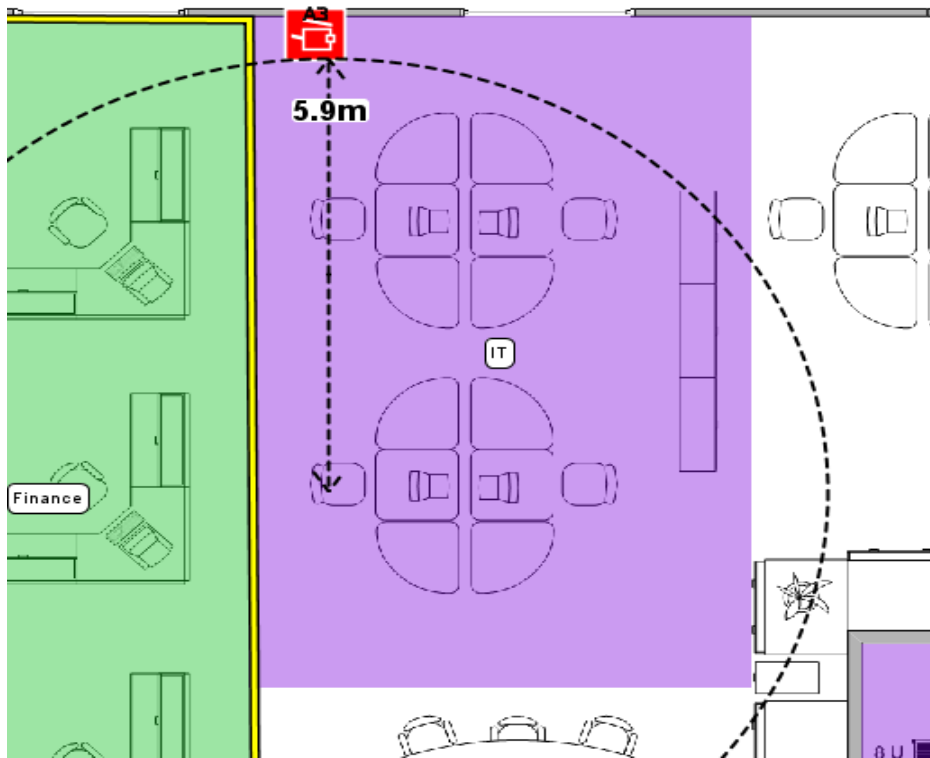


Figure 18. Measurement tool

Select Measure from the Tools menu and simply click and drag away from a point on the floor plan to display the distance measurement. A click of the mouse or a tap on the tablet pen will make it disappear. To deselect the measurement tool, click on the Cursor icon.

8 Department Mapping

The first step you should perform before placing any of your assets onto the floor plan is to define your department names and draw your departments on the plan. By defining your departments first, the department drop down in the asset detail window (explained in section 7.1) will populate automatically, speeding up the input process.

The Departments tab (see Figure 19) enables you to define your departments. Click the “Add” button, name your department and choose a colour for that department. If you decide to change a colour for the department click the “Edit” button to amend. Repeat this process until you have defined all departments. You can add more departments later on in the process as needed.



Top Tip: Choose bold colours for each department to give you more control over how brightly they appear on your floor plan.

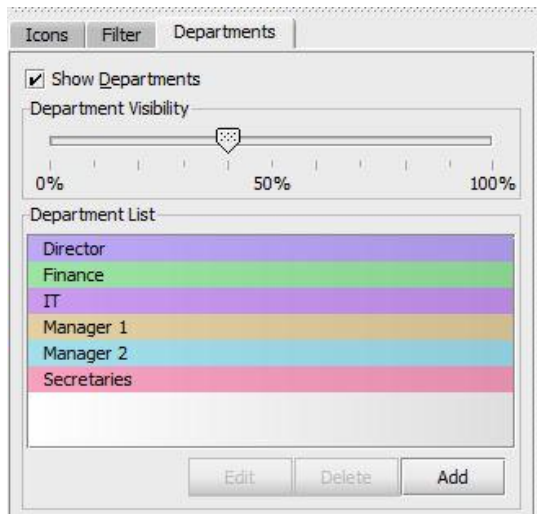


Figure 19. Departments Tab

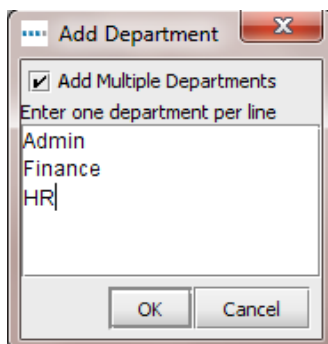


Figure 20. Adding Multiple Departments

Multiple departments can be added at the same time if required by clicking the “Add Multiple Departments” tick box in the Add Department pop-up. This allows you to add a list of departments with each one inserted on a new line (see Figure 20). Asset DB will then assign a random colour to each entry. If the colour is not suitable then it can be edited afterwards by selecting the department from the list and clicking “Edit”.

8.1 Drawing Department Zones

On the Department tab, select a department from the list you created earlier and click the “Draw” button. Your cursor will appear as crosshairs. You can now draw a rectangular department on the floor by clicking in one corner and dragging away to the opposite corner of the department.

The four corners will show as black nodes, each of which can be moved to suit the shape of the department you are mapping.

New nodes can also be added as required by clicking on one of the edges of the department and dragging away as shown in Figure 21.

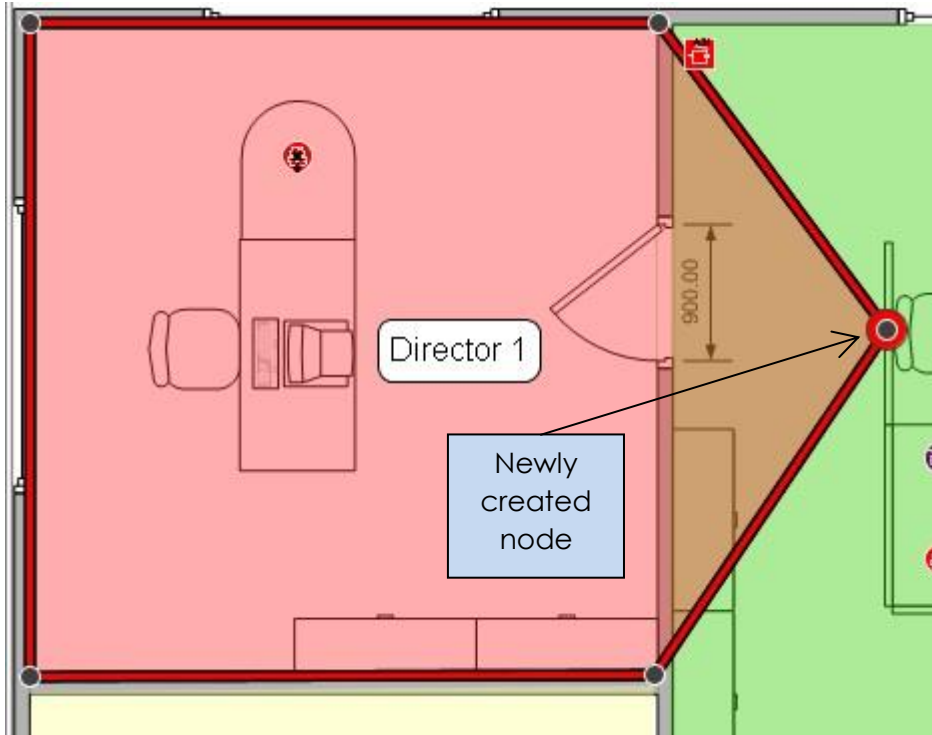


Figure 21. Drawing departments

Alternatively, a department can be drawn by clicking on the floor plan to place points marking the corners of the department zone. To complete, hover over the first point until you see a yellow border around it and then click on the first point again. Once your department zone is drawn you can select it by clicking anywhere within it. Just like a rectangular department map can also be amended by moving existing nodes or creating new ones.

The cost per square foot/metre for a department zone can be entered in the details console to the left of the workspace. Please note that a cost may be entered at any level in the organisation tree but costs defined lower in the tree will override costs defined at higher levels.

Department Zone Details	
Cost per sq. unit	<input type="text"/>
Units	Metres
Staff Numbers	<input type="text"/>
Attachment	Select File
Comment	<input type="text"/>
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

Figure 22. Enter cost details for the department zone

Once a department is drawn, the name of that department will appear in a box within the department zone. You can drag this box around the department zone to find a suitable place for



it, but it will not move outside the area you have drawn. You can change the colour and size of this label by going to Options > Display Options (Alt-Enter) and choosing the Departments tab.

A department zone can be deleted by selecting the zone on the floor plan and using the Delete icon in the tool bar or pressing the Delete key. Deleting a department zone from the floor plan will not delete any assets within the zone. If you decide to place a new department over the assets, those assets will be automatically assigned to the newly created department zone.

9 Asset Table View

Type	Plott...	Data Err...	Site	Building	Floor	Department	Asset No	Serial No	Make	Model	Out Of S...
Yes	No		A Branch Site	DCH House	First Floor	HR & Finance	DCH001	CNCFB16419	Hewlett-Packard	ColorLaserJet2500n	N
Yes	No		A Branch Site	DCH House	First Floor	Bulpen General	DCH015	CNCFB16444	Hewlett-Packard	LaserJet4250DTN	N
Yes	No		A Branch Site	DCH House	First Floor	Reception	DCH014	CNCFB16442	Dell	2330d	N
Yes	No		A Branch Site	DCH House	First Floor	Secretaries	DCH002	CNCFB16421	Hewlett-Packard	ColorLaserJet2500n	N
Yes	No		A Branch Site	DCH House	First Floor	HR & Finance	DCH004	CNCFB16425	Hewlett-Packard	ColorLaserJet2500n	N
Yes	Yes		A Branch Site	DCH House	First Floor	Reception	DCH018		Samsung	SF531P	N
Yes	No		A Branch Site	DCH House	First Floor	Secretaries	DCH003	CNCFB16423	Hewlett-Packard	ColorLaserJet2500n	N
Yes	No		A Branch Site	DCH House	First Floor	Secretaries					N
Yes	Yes		A Branch Site	DCH House	First Floor	HR & Finance	DCH005	CNCFB16438	Fujitsu	M3096	N
Yes	No		A Branch Site	DCH House	First Floor	Bulpen General	DCH016	DRB131663	Xerox	WorkCentre7328	N
Yes	No		A Branch Site	DCH House	First Floor	Director 2	DCH025	CNCFB16447	Dell	2330d	N
Yes	No		A Branch Site	DCH House	First Floor	Secretaries	DCH007	CNCFB16429	Hewlett-Packard	ColorLaserJet2500n	N
Yes	No		A Branch Site	DCH House	First Floor	HR & Finance					N

Figure 23. Table View

The table view allows you to view and filter your assets based on a variety of criteria. You can expand or collapse the table by dragging the top bar up or down.

To change the visible columns, right click in any column header bar and choose from the options on the menu. When you click “More” a list of available columns to add to the table will display, allowing you to decide which columns you are viewing.

9.1 Filtering Columns

Columns in the table can be filtered by clicking on the right side of the column header as shown in Figure 24. To show only one make of devices, you remove the tick marks from the others. To take off the filter, click “All” or right click on the heading bar and select Clear All Filters.

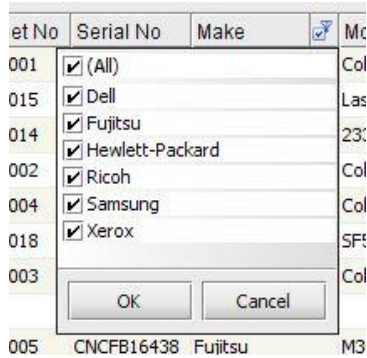






Figure 24. Filter View

9.2 Table Tools



Figure 25. Table Tools

On the right side of the table, there are 4 buttons for you to use in conjunction with the table. They perform the following functions.

- Plot Asset  - Described in section 10.3, this button allows you to plot an asset on your table that is not yet positioned on a floor plan
- Change the Asset Type- Asset DB will assign a type of device to a model when it is imported into the table (Section 17.2.2). To change it, or to set it in the first place if a device is not recognised, select  and choose the correct icon.
- Relocate  - Allows you to relocate a device to a new floor. More information on relocation can be found in section 12.2.
- Tool Button  - Allows you to change settings on the table. The option to show assets without a floor is found here.



10 Plotting Assets

10.1 Positioning Icons from Icon Tab

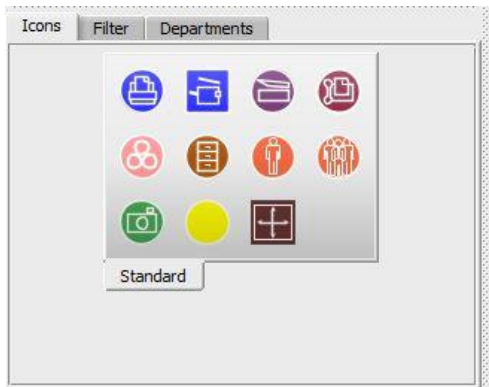


Figure 26. Icon Tab

The Icons tab to the bottom left of the workspace can be used to select assets to be placed onto the floor plan. To see what each icon represents, hover over it to display a description. After clicking on the appropriate icon, it will “stick” to the cursor until placed on the floor plan by clicking again in the desired location.

The icons can be resized using the slider shown in Figure 27.

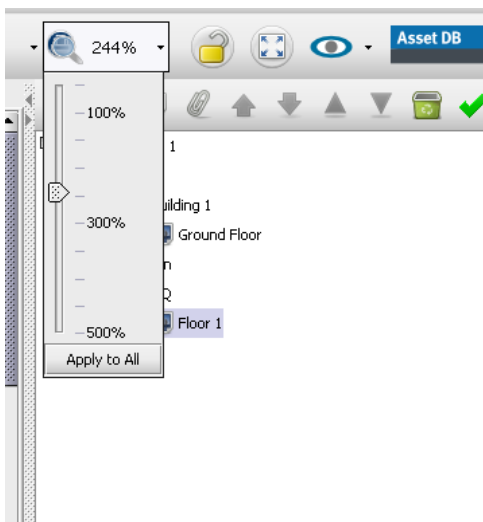



Figure 27. Icon Size Slider

You can add more icons to your toolset if necessary. Instructions on how to add icons is found in section 19. If an icon is selected unintentionally, you can click the Cursor button  at the top of the screen to cancel selection.



Once an asset has been placed on the floor plan, details may be entered in the Asset Details console to the top left of the workspace. When data entry is complete, click the Update button to save the details.

If you are unhappy with the location of an asset, it can be moved by dragging it with the pen or left mouse button.

Note: All actions such as placing and moving assets on the floor plan are instantly saved. The application may be terminated at any time and no data will be lost.

10.2 Unplotting Assets

Once plotted on a floor plan; an asset can be removed by right clicking and selecting Unplot Asset See Figure 28. The asset will be removed from the floor plan but will not be unassigned from the floor. The asset will remain in the Asset Table below the Floor Plan window but removed the icon will be removed from floor plan.

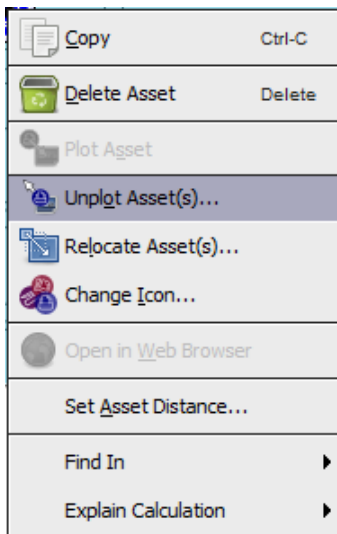




Figure 28. Unplotting an asset

10.3 Plotting Icons from the Asset Table View

After importing external data (Section 17.2.1) you may have some devices that are not plotted. To see all devices that have not been plotted, first click  and make sure the box is ticked in front of Include assets without a floor. Then, click on the right hand side of the Plotted column header, tick the box in front of False and untick True to show only unplotted assets. If False is not an option, all of your devices have been plotted.



Once you have a list of devices that have not been plotted, you can plot these devices. Click on the device from the list and choose the Plot Asset button  either from the right hand side of the table, or by right-clicking on the device in the table and selecting it from the menu. This will attach the icon to your cursor. Click on the floor to place the icon. You can also click on a device from the list, and drag it onto the floor plan. Use the Search function described in Section 11.2 to find the device you want to plot.

If the device does not yet have a type, you will be prompted to choose the correct icon as shown in Figure 29.

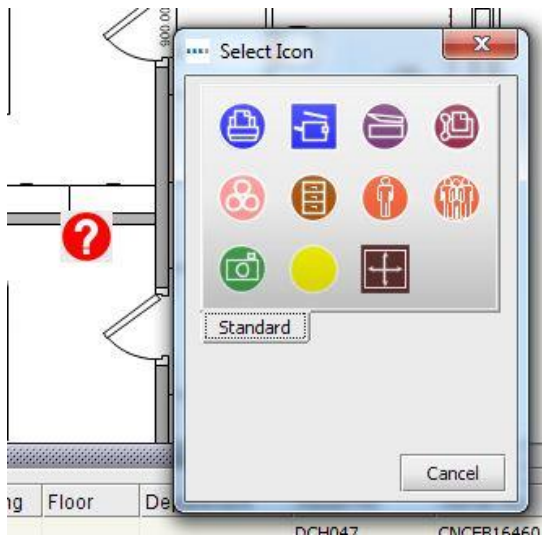


Figure 29. Icon Selection

Once your device is on the floor plan, the Plotted column will change from No to Yes and the Site, Building, and Floor columns will be populated.

If the Not Found field was ticked for an unplotted device, it will automatically become unticked once the device is plotted.

10.4 Adaptive Icons

Some of the icons within Asset DB are adaptive, meaning they change dynamically to provide a visual display of certain defined attributes. This powerful feature allows you to look at a floor plan and determine at a glance which devices have nominated attributes, for example Colour Capable, Inkjet, A3, Networked etc. Figure 30 shows how the icon formats change for these nominated attributes.

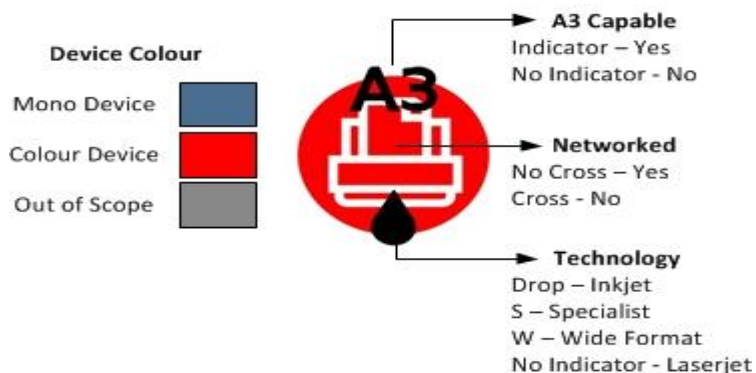


Figure 30. Printer indicators

Please note that the colours listed overleaf may not match what you see if you have customised your icons to change colours based on different criteria. See section 19.1.3 for more information.

10.5 Types of Assets

There are two types of assets: Data Only assets such as electronic equipment; and Data with Thumbnail Image assets such as storage units. All assets have an ID, which is used by Asset DB to uniquely identify an asset and locate it on a floor plan. An asset's ID is unique.

10.6 Make and Model Input

Electronic items have drop-down menus for speedy and error free input of make and model information (see Figure 31). These makes and models are drawn from an extensive database unique to Asset DB. The first nine makes that appear in this drop down menu will be the most popular models. Data entered in other ways may not be found in the TCO database.

You can also begin to type the name of a make or model into the field, and options will appear below the field for you to choose from. Type in the most unique part of the model name (e.g. the model number without name or abbreviations) to get the best results.



Figure 31. Make and model input

Note: The icon customisation feature (described in section 19.2) lets you mark any given data field as mandatory. These fields appear with a red outline as shown in Figure 31. After entering data for a device, a pop-up window will warn you if you have forgotten to enter mandatory data (see Figure 32). This is only a warning and will not force you to go back and update.

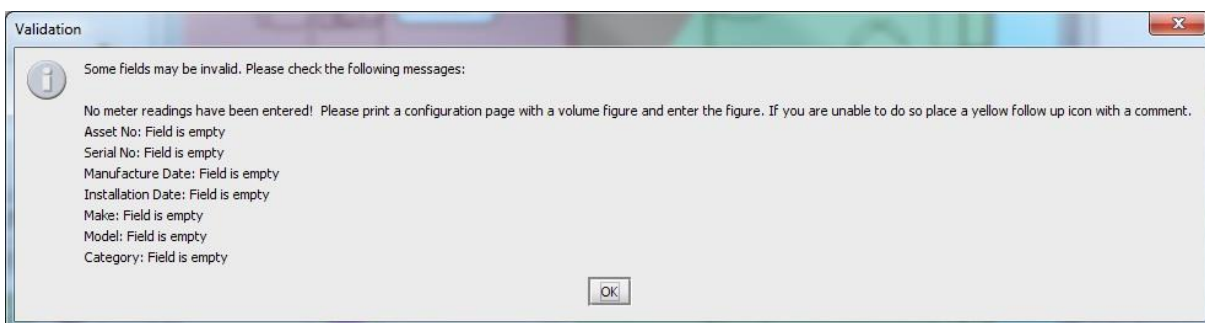


Figure 32. Validation warning

Mandatory field notification can be switched off within Asset DB; this is especially useful if you are working on a project after the audit such as for solution design purposes. To toggle this feature on and off go to Options > Field Validation.

You may also set your own validation messages through icon customisations. This is explained in section 19.1.5.



Depending on which options you have selected for a device, further options may become visible. For example, if you tick the Large Paper Capable box to indicate that the device in question is able to print on large paper, you will be presented with an option to indicate if this function is in use or not for the device in question.

10.7 Meter Readings

The capture of device meter readings is an important part of the audit process. Asset DB facilitates this by allowing the capture of rolling meter readings.

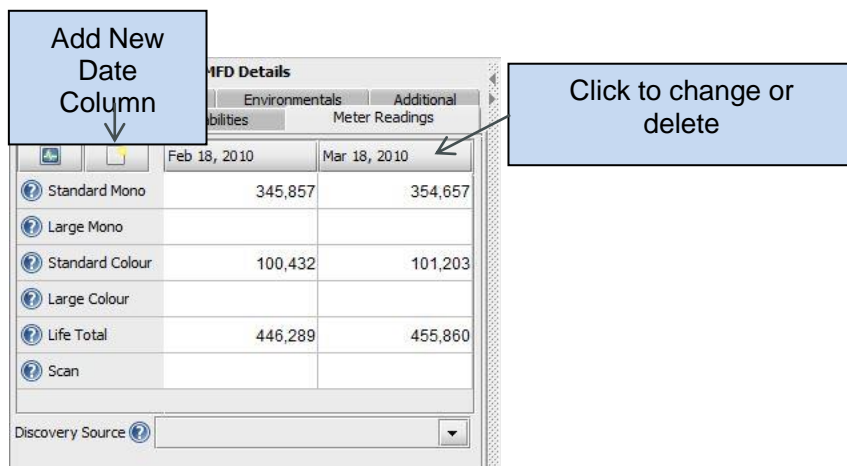


Figure 33. Meter readings

Meter reading fields will be visible based on information entered on other tabs. For example, Figure 33 shows meter readings for a colour multifunction device that is large paper capable and scan enabled. If the scan enabled tick box was not marked on the capabilities screen, the Scan meter reading field would not be visible. A mono A4 printer would only show you the Standard Mono and Life Total fields.

In the specification tab, you can specify how many colour meter levels the device is capable of tracking. For mono devices, this will usually be 0. For standard colour devices, this will usually be 1. For devices capable of capturing three colour levels, you can select 3 and capture the readings for the three colour levels.

Note: If you have a Life Count meter reading field as part of your icon customisations, this entry will not take part in the printer statistics calculation under the statistics tab or statistics export. Only readings split by mono or colour will be calculated.

Meter reading data can also be populated from an external source. Please see section 17.2.1 for more information.



10.8 Barcode Scanners

Barcode scanners may be used in the same way as keyboard input or handwriting recognition. Place the cursor in the appropriate field then scan with the barcode scanner to populate it. By programming the barcode scanner to emulate the <Tab> key after scanning, the cursor will automatically move to the next field. Thus, if there are several pieces of bar-coded information to be entered, the barcodes may simply be scanned one after the other without interruption.

10.9 Digital Cameras

Figure 34. A digital image associated with an asset

Assets with thumbnail pictures may require a digital picture to be taken of the asset type. The camera software should be launched for the addition of a new thumbnail into the thumbnail gallery. The thumbnail gallery is accessed using the button below the thumbnail. Once an image is uploaded from the camera it will appear in the thumbnail gallery.

10.10 Thumbnail Gallery

Each item in the thumbnail gallery has its own set of fields.

It is important that these fields are completed correctly so that accurate statistical analysis can take place automatically.

Once an asset type has been added to the gallery, the same asset type can be easily selected from the gallery with its details already completed rather than input each time. A selected thumbnail is highlighted in red (see Figure 35).

The '%' symbol and 'cm' should not be added to the numerical data entered.



Important Note for Storage Assets: When entering the number of drawers for storage items disregard vertical separators. This is important for statistical calculations. Number of drawers (or shelves) should be horizontal drawers capable of holding an A4 file. The number of drawers is then multiplied by the greater of length and depth of the unit and then by the percentage utilisation to calculate linear metres of storage.

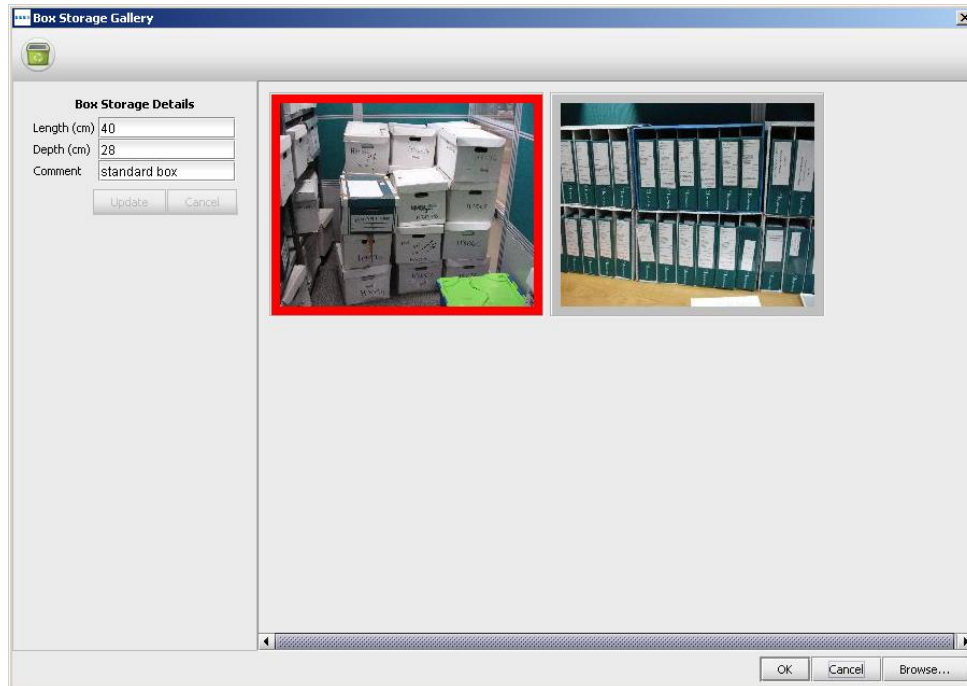


Figure 35. Thumbnail gallery

10.11 Copy and Paste

When adding a number of assets of the same type there are three ways to use the copy and paste tool to save you having to repeatedly re-enter the same information:

- After inputting the first duplicated asset, press the Copy button. Clicking the Paste button will then cause a duplicate icon to “stick” to the cursor and allow positioning on the floor plan as normal.
- Alternatively you can right click on the device and select Copy from the drop down, then right click again and select Paste.
- The third way is to select the asset, then use the Ctrl-C copy function and the Ctrl-V paste function to stick the asset to your cursor ready to be positioned in the desired location.



Figure 36. Copy & paste asset



10.12 General Navigation for Auditing

The floor plan for a floor may be viewed by clicking its icon in the organisation tree. The plan can be moved by clicking on a free portion of the floor plan and dragging to the required position. The floor plan may also be manipulated through a combination of using the zoom bar at the top of the workspace, the reset zoom button and the scrollbars to the edge of the floor plan window.

When the correct floor has been selected, the available space for viewing the floor plan may be increased by pressing the Expand button. This is a toggle button which will hide each of the side panels in turn and then return you to the standard layout.



Figure 37. Expand/lock floor plan

All zoom and scroll settings are remembered from floor to floor within your Asset DB session.

11 Viewing Asset Information

To display or edit an asset's data in the Asset Details console, select the asset by pressing with the pen or left clicking with the mouse.

Top Tip: When reviewing assets, it is useful to lock the floor plan to prevent the accidental movement of assets. This can be done by pressing the padlock toggle button at the top right of the screen (see Figure 37.)



11.1 Viewing the Web Page for a Device

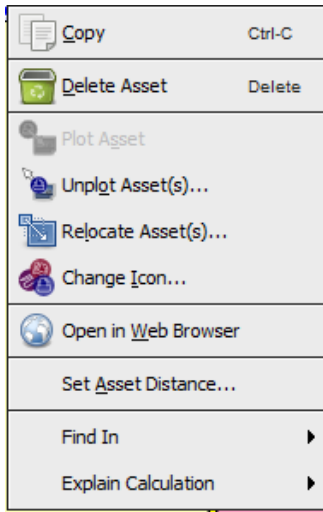



Figure 38. View device web page

Most network enabled devices run an embedded web server. If the IP address of the device has been populated, right-click on the device on the floor plan and choose Open in Web Browser to view the device's web pages (see Figure 38).

Note: for this feature you must have an active network connection to the network that the printer is on.

11.2 Search

The search bar is at the bottom of the window (see Figure 39). The search text can be entered either via a keyboard/handwriting pad or via a barcode scanner. You can search for an asset using several different criteria. To define the fields you are searching for, click the arrow next to

the magnifying glass  and choose Select Fields to Search. This will allow you to choose any one or multiple data fields to search. As you type in your search criteria, the list of assets will be narrowed down in the table above. The search will be based on the level you have selected in the project hierarchy. For example, if you are at the project level, the whole project will be searched for that asset.

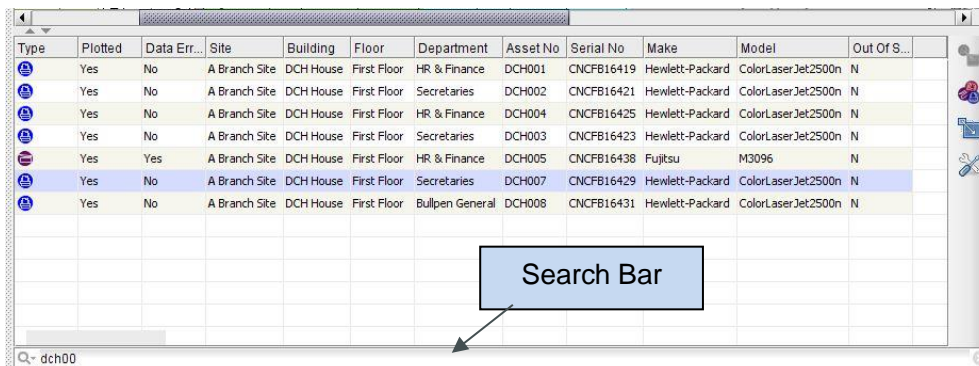



Figure 39. Search bar

To clear your search and return to a full list of assets, click on the cross  to the right of the search bar.



11.3 Statistics

Summary information on the assets on a floor and department zone cost information can be displayed using the statistics tab at the bottom right of the workspace. Statistics are displayed based on the level of the project you currently have highlighted- project, building, floor or department.

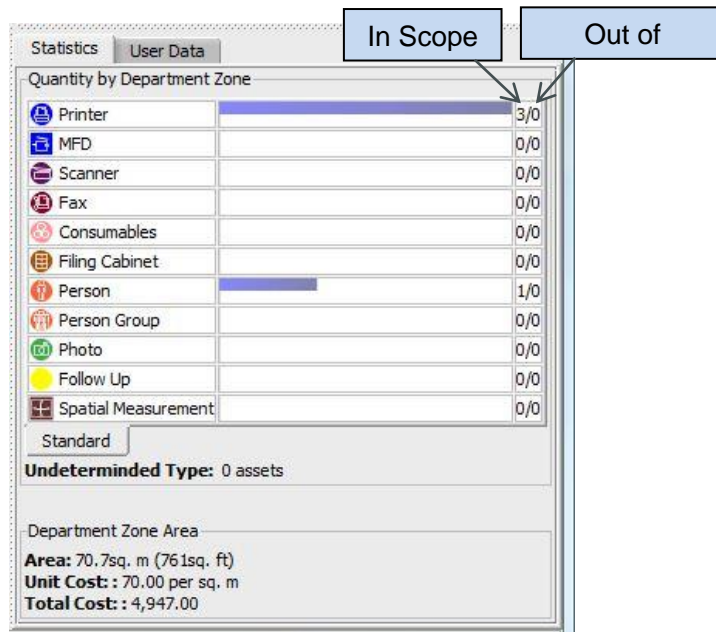


Figure 40. Asset statistics

11.4 Filter

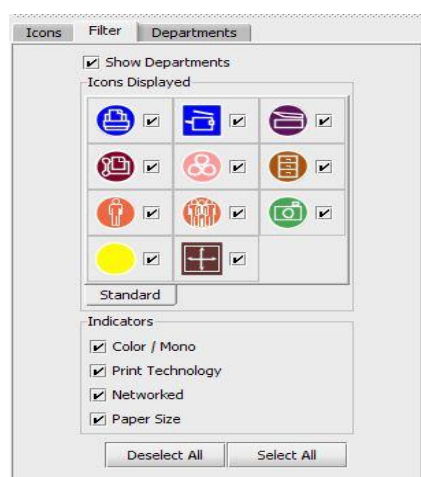


Figure 41. Filter tab

The filter tab may be used to hide and display elements on the floor plan:

- Department zones may be turned on and off.
- All instances of a particular device type may be displayed or hidden on the floor plan.
- If variable icons are being used, the variable device colours and print indicators that appear on the device icon can be turned off.

Note: These filters remain in effect when exporting floor plans to PDF (see Section 18).



12 Further Asset Functions

12.1 Changing Device Type

In some instances you may need to change the device type of an icon on the floor plan. For example, you may have placed a printer on the floor and entered all the appropriate data then realised it should be an MFP. To change the device type either highlight the device and use the Edit > Change Icon menu or right click on the device in question, choose Change Icon and then select the desired icon from the resulting pop-up. In most instances the data will be mapped to its corresponding field (e.g. data in the Model field will remain in the Model field). In cases where the corresponding field does not exist in the new device type, the data from the non-existent field will be placed in the comment field.

12.2 Relocating Assets

From time to time assets will require relocation across floors. The relocation function is found either by right clicking the asset or using the Relocate icon in the toolbar. A dialogue will appear allowing you to select the destination floor. You will be redirected to the new floor. The asset will not appear on your floor plan, but it will appear in your table for you to plot in the correct location.

It is also possible to relocate an asset to the project level, the result of which is that it will be unplotted and no longer associated with a floor. This is done in the same way as relocating to a different floor, only the project level must be selected instead (see Figure 42).

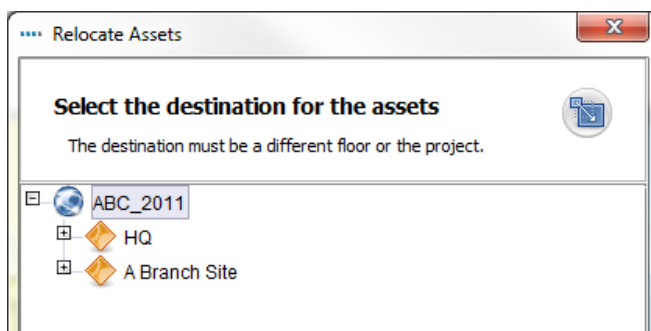


Figure 42. Relocate Assets

You can also relocate an asset directly from the table, by choosing the Relocate button on the right hand side of the table or in the top toolbar (see Figure 43).



Figure 43. Relocate button



12.3 Multiple Selection

You can select multiple icons at once in two ways. The first method is to hold down the control key on the keyboard and click one device at a time. You can either select them from the map or from the table. The selected items will all have a square behind them signifying that they are selected.

The second method uses the Multiple Select icon located on the main toolbar. Simply click and drag to form a drawn area on the map, and all the devices inside the drawn area will be selected.

Once selected, devices can be moved as a group, deleted or relocated to another floor.



Figure 44. Multiple select

13 Floor Notes

Floor notes can be added to the floor plan to share notes and ideas with other auditors or with the solution architects. These are much like sticky notes as shown in Figure 45.

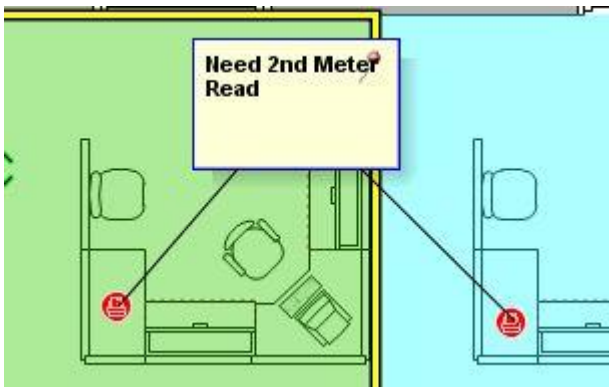


Figure 45. Floor Note

You can also pin the note to devices or areas of the floor by clicking on the pin in the top right corner and dragging to the area you would like to pin the note to.

The look of the floor note can be changed by going to Options > Display Options (Alt+Enter) and choosing the Floor Notes tab.



14 Preparing Project for Export and Sharing

14.1 Adjusting global settings in Asset DB

More general settings for Asset DB can be managed through Options > General Options. This pop-up has four overall settings that can determine:

- Data import and export settings
- Asset DB Cloud settings
- Photo import settings
- User name settings

See Figure 46 below.

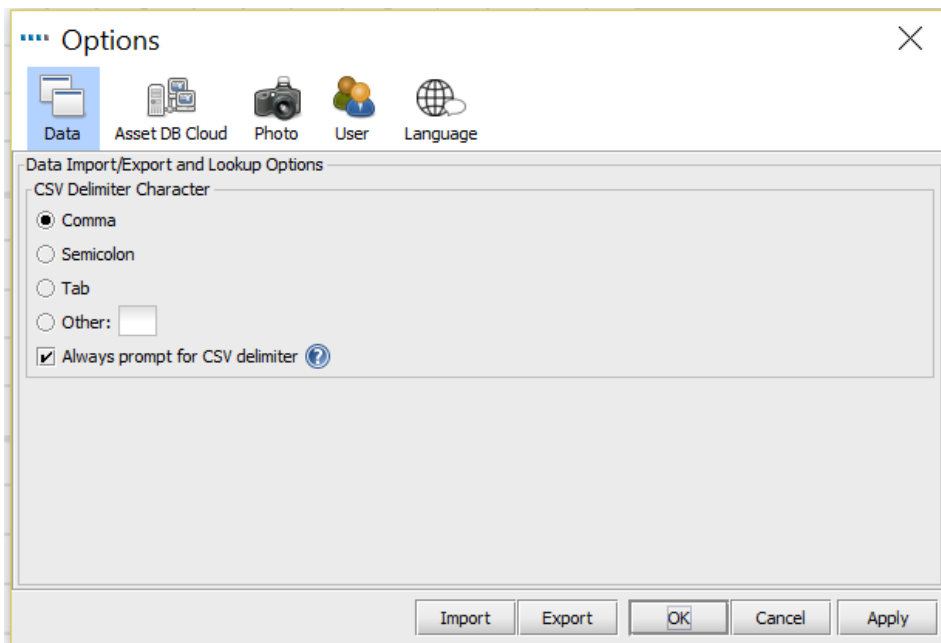


Figure 46. Asset DB global settings menu

Within the User tab, there is a setting to “Prompt for a name at start-up”. This will mean that every time Asset DB is opened, the user will have to enter a name before they can proceed. This will then populate any data exported from the project with the name of the user who entered the data.



15 Icon Labels

15.1 Displaying labels

Asset DB can show a label for each icon on a floor plan via the View > Icon Labels menu item. Ticking the box will turn on the icon labels.

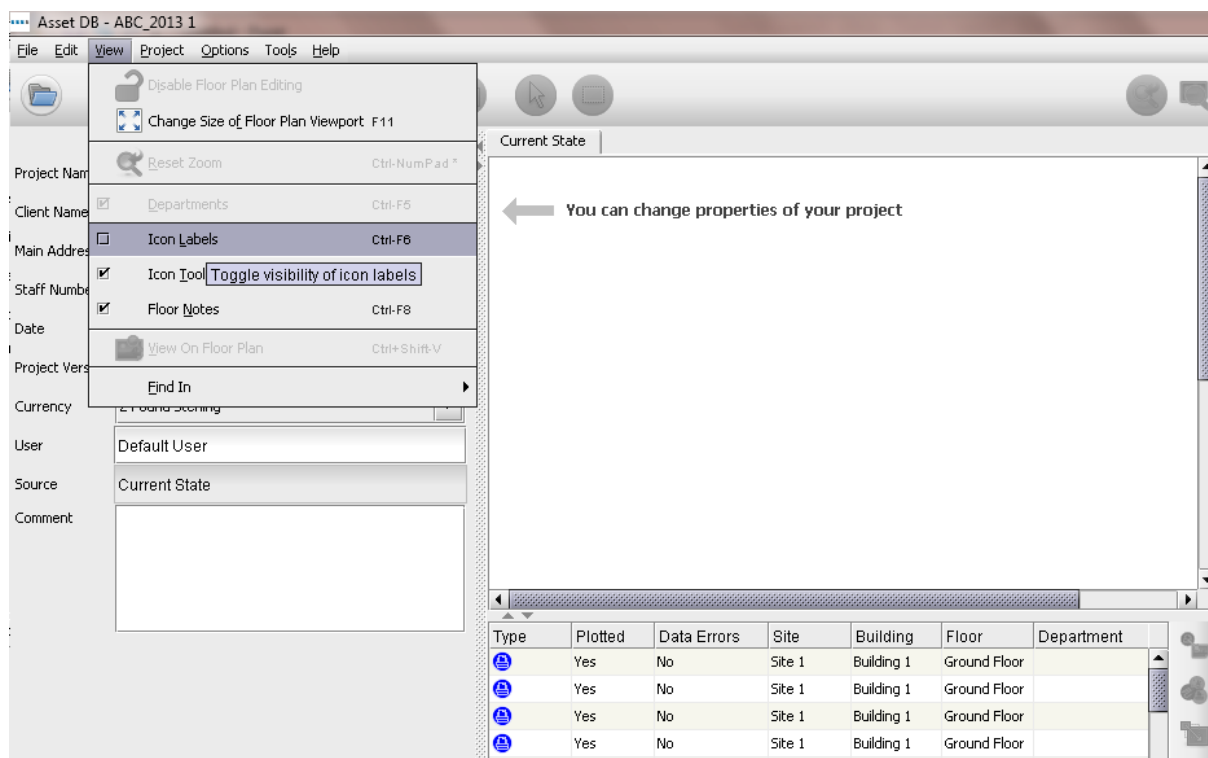


Figure 47. Displaying icon labels

Note: The same result can be obtained by going to Options>Display Options and ticking the “Icon Label” box.



15.2 Configuring labels

Asset DB gives you the option to create different configurations to modify labels, floor borders and highlight colours depending on your needs or preferences, by going to Options>Display Options. Once you have made the selection the Project Options window will be displayed (see Figure 48)

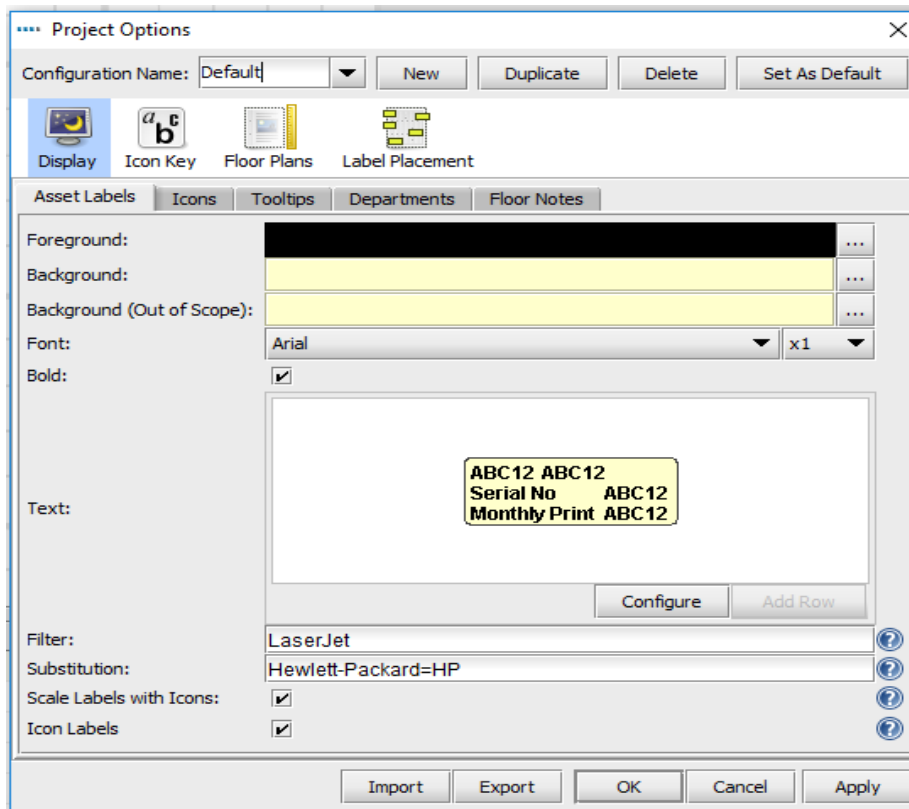


Figure 48. Project Options

To create a new configuration simply select the “New” button and edit the name on the “Configuration Name” field.

In addition to creating new configurations, you are able to duplicate, delete or set your configuration as default for all future projects, see Figure 49.

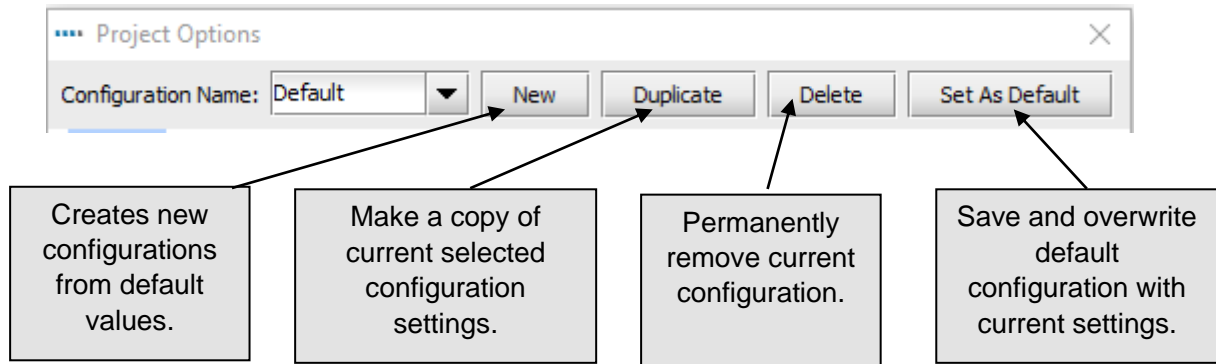


Figure 49. Project Options toolbar

Pressing the arrow next to the configuration name grants you access to the list of existing configurations in your project and lets you to switch between them.

Your preferred configuration is synchronised with the project. Other users will be able to select your configuration once they have updated the project from the server.

There are two new options on the toolbar at the bottom, “Export” and “Import”. The “Export” button allows you to export and save the selected configuration. The “Import” button makes it possible to import a previously exported configuration into a different project.

Note: The display configuration export uses the following extension ‘.atg’

To save your configuration click the “Apply” button. By selecting “OK”, the settings will be saved and the “Project Options” dialogue will close. Clicking “Cancel” discards all the changes and your configuration will not be saved.

15.3 Customising Labels

Labels can be customized by going to Options > Display Options (Alt-Enter) and choosing Asset Labels. This will allow you to set a different colour background for devices that are in and out of scope as well as adjust the font, colour and size of the text.

It is also possible to edit what information is displayed on the labels. Selecting the Configure button allows you to add/remove rows of text, select which text field will show and whether or not the title of the field will show.

The Filter and Substitution options allow you to filter out commonly used or unnecessary words and use abbreviations for longer words.

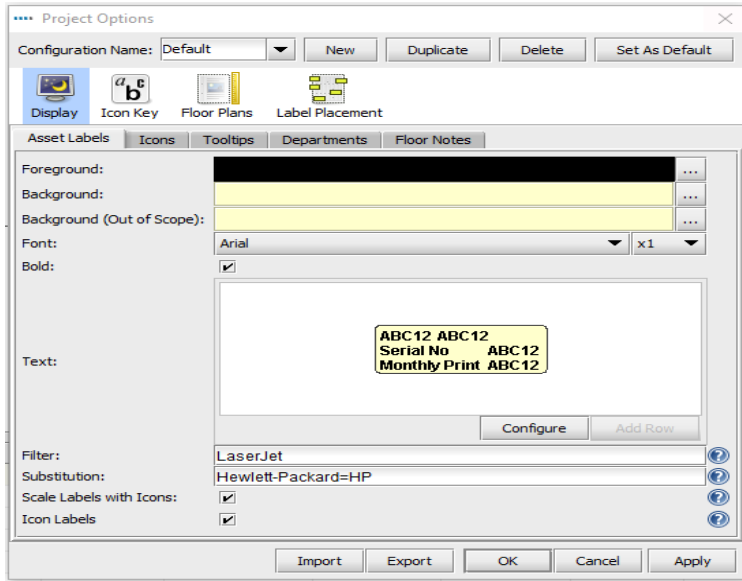


Figure 50. Customising icon labels

The filter field can be used to enhance the text options in the labels. For example, it is possible to enter 'LaserJet' as the filter so that a 'LaserJet4350' would be shown simply as '4350'.

The substitution option allows you to abbreviate or shorten your labels. Multiple substitutions can be made using a comma separated list. An example of a common substitution would be for Hewlett-Packard to display as HP.



15.4 Adding Borders to a Floor Plan

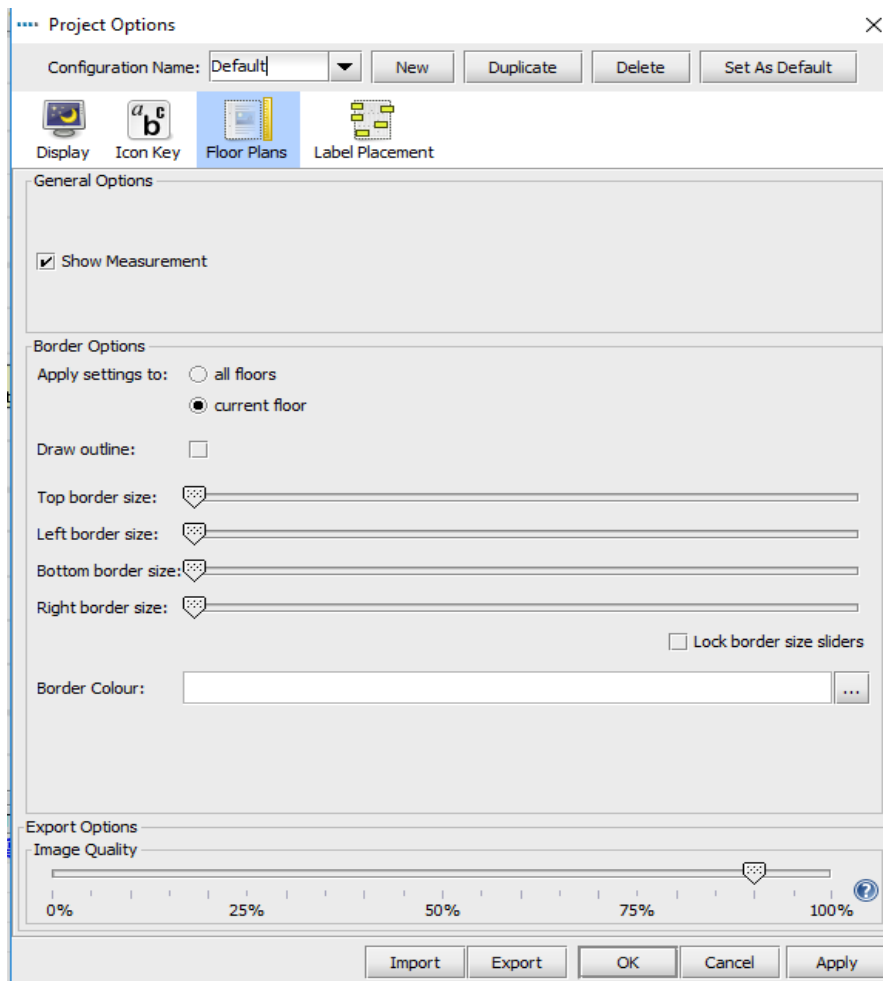


Figure 51. Adding a border to a floor plan image

Asset DB can add borders to floor plan images via the Options > Display Options (Alt+Enter) > Floor Plans menu item. These options apply specifically to the project. The border can be applied to all floors in the project or just to the current floor being viewed.

Each border (top, bottom, left and right) can be set individually or the Lock border size sliders tick-box can be used to set them all as the same.

Borders are included in exports of the floor image and can be used to place labels outside the floor plan itself.

15.5 Adjusting Floor plan Image Size

Within the popup there is also the option to reduce the image quality and thus reduce the size of the floor plan file. This is important for computer generated images or scans where the dpi is higher than 300 resulting in very large floor plan images. Reducing the image quality in the export enables a smaller



15.6 Automated Label Placement

Icon labels can be dragged around the floor plan just like the icons themselves. This feature allows for the exact positioning of labels.

Asset DB also provides an automated label placement option. This feature is found under Options>Display Options. This will bring up the options dialogue seen in Figure 52.

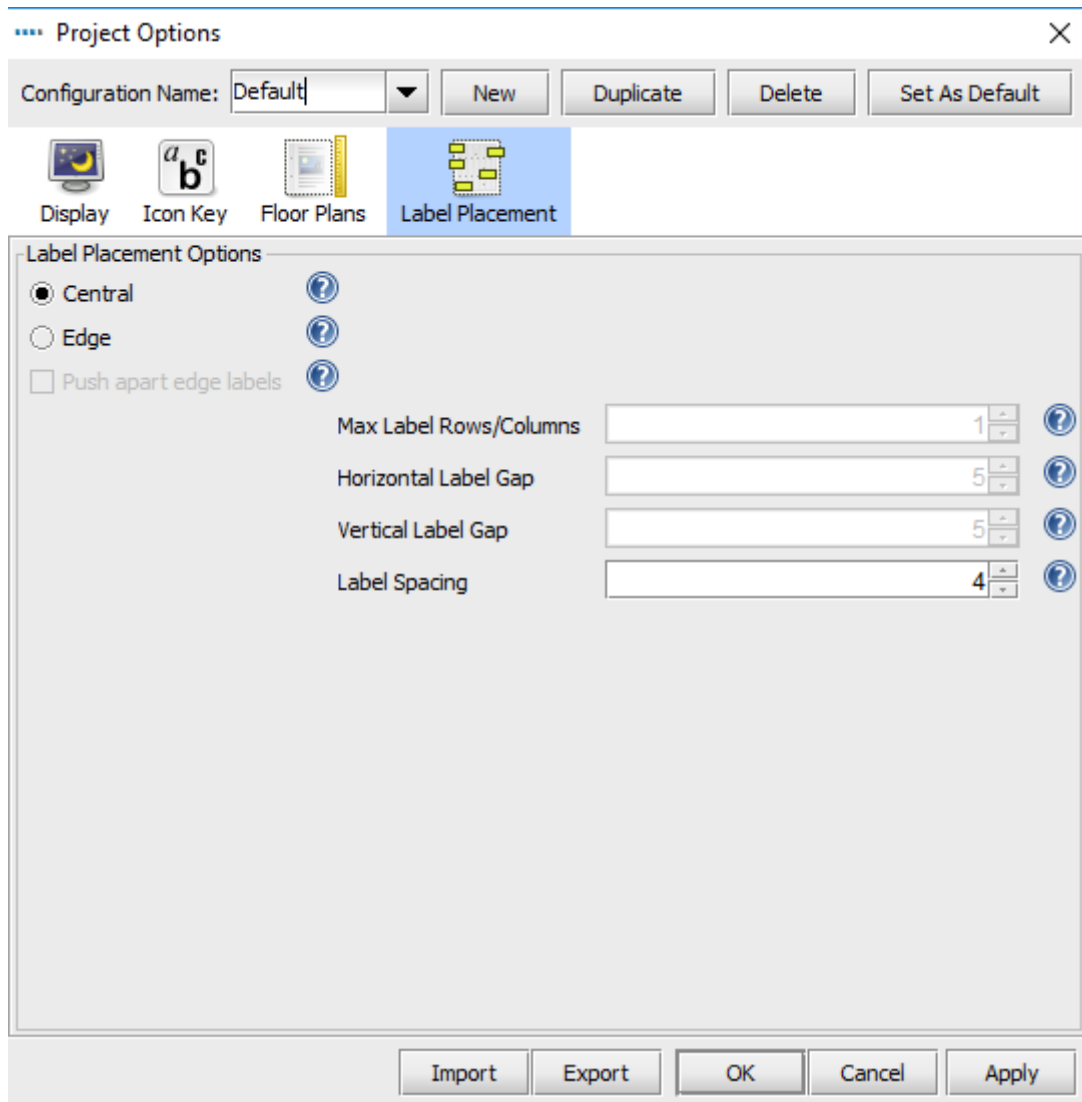


Figure 52. Automated Label Placement options dialogue

The various options are described below.

- **Central:** selecting this option will cause Asset DB to place each label as close to the corresponding asset as possible, while attempting to prevent label overlaps.



- Edge: selecting this option will cause Asset DB to place all labels at the edge of the floor plan (or in the border area if a border is in use). Selecting Edge enables the following options:
 - Max Label Rows/Columns: sets the maximum number of label rows/columns that should be used on any given edge if all the labels cannot be placed in a single row/column along that edge.
 - Horizontal Label Gap: this option controls the horizontal gap between labels. Labels will always be placed at least as far apart as the distance (in pixels) specified by this value.
 - Vertical Label Gap: this option controls the vertical gap between labels. Labels will always be placed at least as far apart as the distance (in pixels) specified by this value.
 - Label spacing: this option will add space around labels when reorganising, keeping all labels clear and visible.
- Push apart edge labels: This option affects the edge placement and will spread the labels around the edge of the floor plan.

Once you have set up the options as you would like, go to Tools > Rearrange Icon Labels. Selecting this option causes the icon labels to be placed automatically by Asset DB. Please note that this operation *cannot be undone*.

Note: Every label configuration created in a project is stored in the server the moment the project is synchronised. The position of the labels will depend on the selected display configuration.

16 Floor Plan Keys

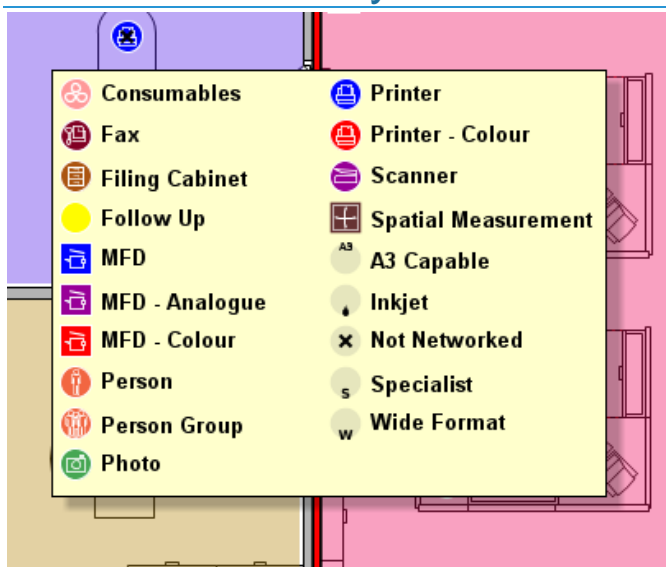


Figure 53. Example of an automatically generated floor plan key

Asset DB can automatically generate a key for all icons and symbols on a floor plan. To show the key for a floor use the Options > Display Options > Icon Key panel and tick the Show Key tick box. The key will only show details relating to the assets that appear on the floor plan. If there are no A3 capable devices on the floor for example, the A3 capable notation will not be displayed on the key.



The first time a key is displayed it will automatically be positioned in the top left corner of the floor plan. It can then be dragged around the floor plan and positioned as desired. Presentation can be controlled via the Options > Display Options > Icon Key configuration panel.

Overall PDF or Word file document.

17 Importing and Exporting Data

17.1 Exporting Data

Once data has been input into Asset DB it may be useful to export the data for further analysis or modification. This can be done via Project > Export. Below are the types of information that may be exported from this menu:

1. Asset DB Data – exports the base data collected in Asset DB to a Microsoft Excel file. Either a flat CSV file or Microsoft Excel Workbook can be exported (in Excel format each device type and gallery type is separated out into a separate worksheet).
2. Project XML- Asset DB provides the feature of exporting project data to XML (Extensible Markup Language). This can be used to include Asset DB project data into websites and external databases. Please consult your local Database/Web administrators for use of the XML export. Xerox does not provide support for third party use of the XML.
3. Organisation – exports all information referring to project, site, building and floor, such as staff numbers, site contacts, access requirements, etc.
4. Floor Plans – exports floor plans to PDF or JPEG format with the same tree structure as that used in Asset DB. You can also choose to export the selected floor plan or the original floor plans without any icons, departments, etc.
5. Gallery – exports all gallery types with information on each type.
6. Icon Customisations – If you decide to customise your icons, you can export that customisation to use it again in future projects.

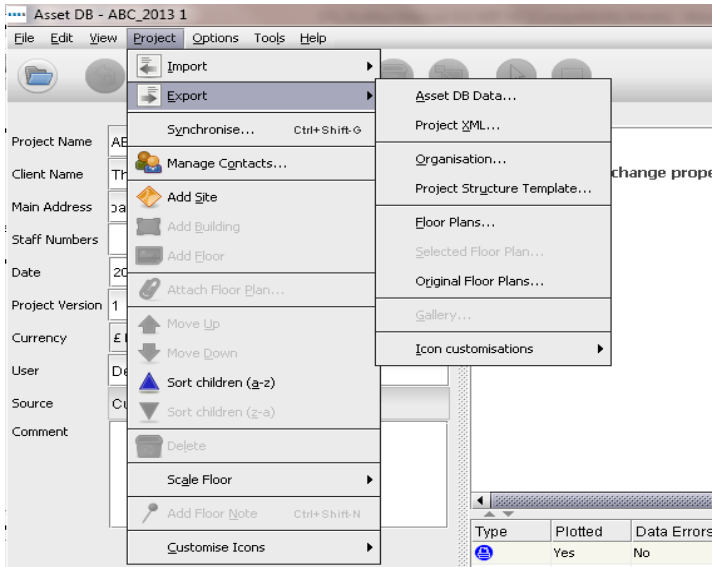


Figure 54. Export data

17.2 Importing Data

This process can be used to create assets, to amend data in existing assets and to add new data into blank fields that have not yet been populated. Existing assets are updated using this feature, but assets cannot be deleted in this way. Any data added to the CSV file should be plain text and contain no underlying formulas.

17.2.1 Import External Data

Data can be imported from a number of third-party tools. Any CSV (Comma Separated Values) file can be imported via menu option Project > Import > External Data.



Figure 55. Importing External Data

The External Data Import dialogue will be displayed and a CSV file can be selected by typing the file path of the file to be imported or by choosing the '...' button and locating via a standard Explorer window:

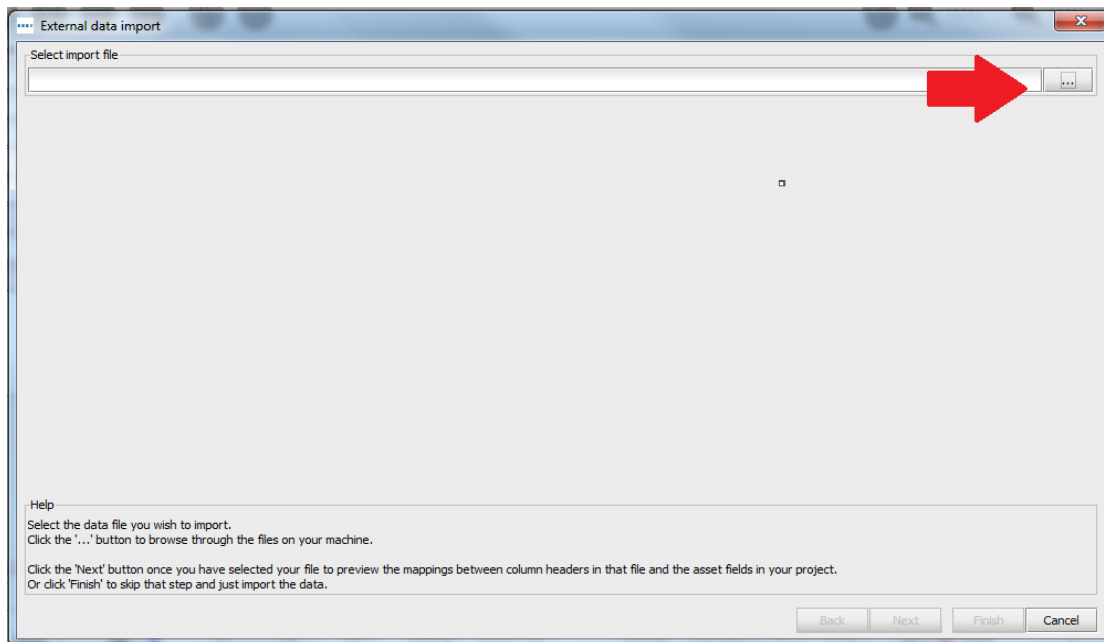


Figure 56. Choosing a file to import

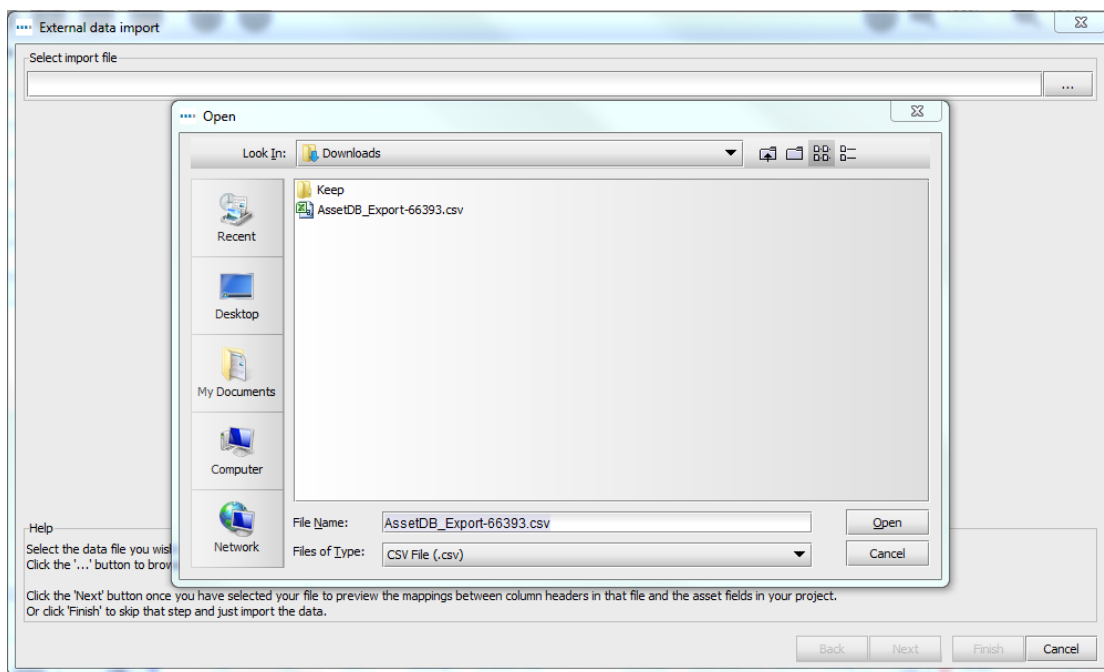


Figure 57. Browsing for import file

In order to match new data to existing assets and to identify new assets present in the data file to be imported but not yet present in the Asset DB project, it is important that columns containing data in your file be matched to the correct Asset DB fields. On data import, after selecting the file to import, Asset DB presents a column/field matching dialogue, as can be seen in Figure 58.

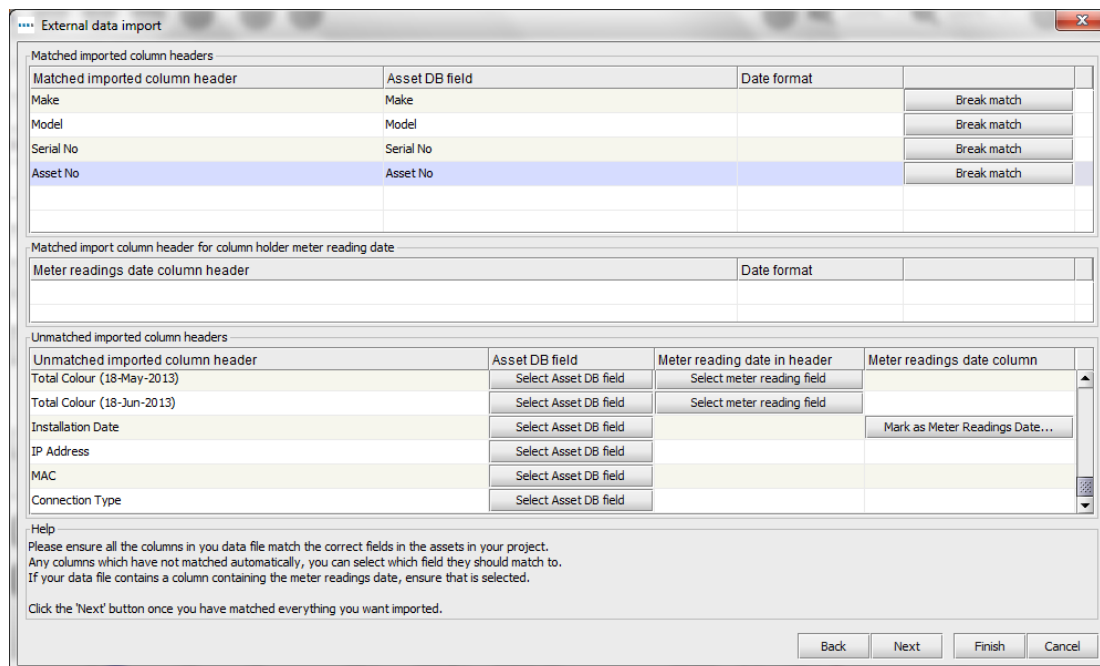


Figure 58. Column/field matching for external data import

The top section of this dialogue shows columns that have been auto-matched to Asset DB fields. These matches can be reviewed and, if the match is correct, left as-is. If the match is incorrect, the correlation can be removed by clicking on the Break match button. This will then add the column from the data file to the table of unmatched columns in the lower half of the dialogue.

In the lower table are displayed all columns in the data table that have not been automatically matched to Asset DB fields. These columns are available to be linked to Asset DB fields by clicking on the Select Asset DB field button. When this button is clicked, a secondary dialogue will be displayed, showing all of the tabs and fields for assets available in the current project for each asset type. The field into which the data in the columns should be imported can then be selected. Once this is done, the matched column and field will be displayed in the upper table of the External Data import dialogue.

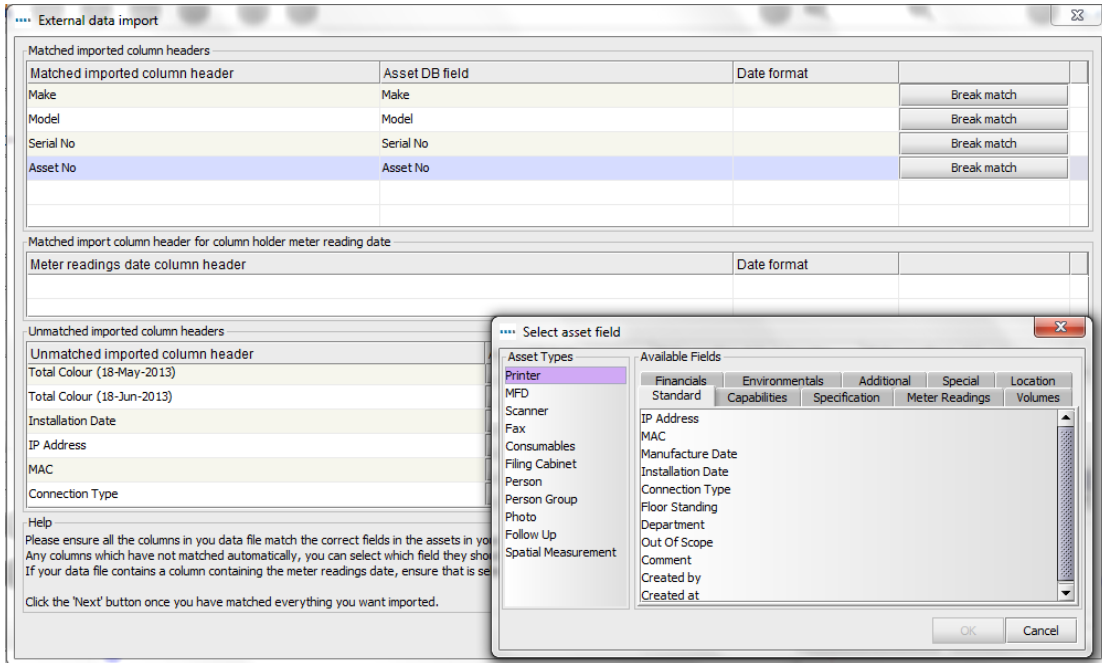


Figure 59. Selecting a field to match to column in import file

Depending on the source of your data file, you may have meter readings that haven't been automatically matched to the corresponding fields in Asset DB. If there are reading dates in the column headers in your file, you can choose to insert the meter readings according to those dates by clicking the Select meter reading field button rather than the Select Asset DB field button (see Figure 60). This will match all the columns with the same header (e.g. Life Count [date]) and import them against the date in each header. Please refer to section 17.2.3 for information about date formats.

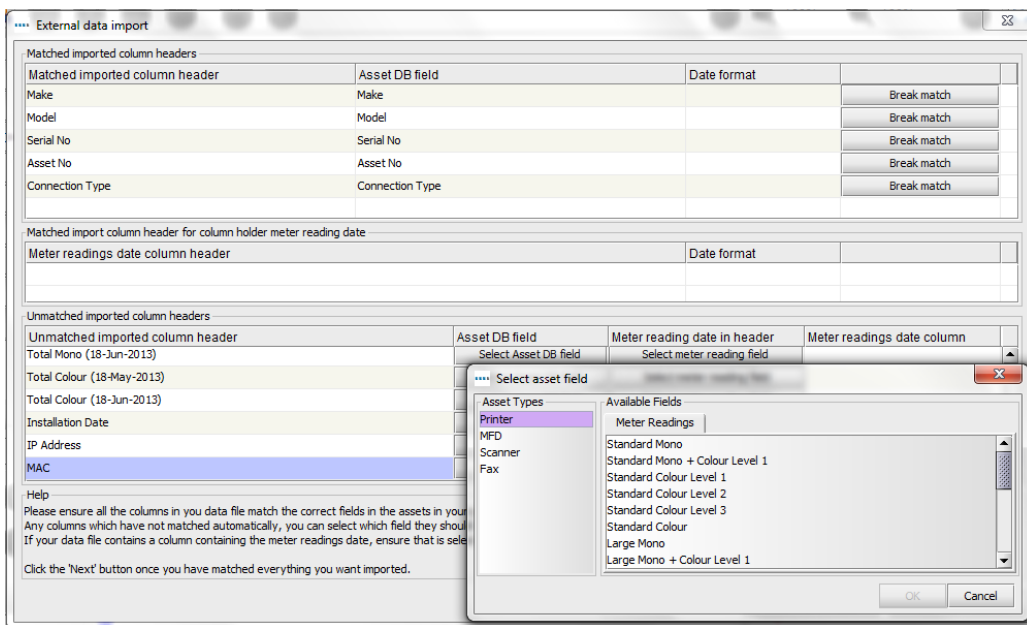


Figure 60. Select meter reading field



Once all column-field matches have been made, click the Next button and on the following screen, tick boxes will allow you to control whether your data creates new sites/buildings/floors/assets or whether the import simply adds data to existing assets. Not all tick boxes will show at all times, depending on the data in your import file and the impact on the project. The tick boxes and their actions are as follows:

- **Overwrite existing values** - allows any values in the import file which are different to those already in the project to be used instead of the pre-existing values. If left unticked, the data in the file will be used to fill gaps where data doesn't exist but will not overwrite any existing data.
- **Create unfound assets as new** - new assets to be added to the project for each asset found in the file to be imported that is not currently present in the project. This option will only be available if there are rows of data in your file that do not correspond to existing assets in your project.

Locate / Relocate Assets – allows new assets to be assigned to a site/building/floor and existing assets to be relocated to a site/building/floor on import. All three fields in the import file must contain values matching the tree structure in the project for the assets to be successfully assigned to a floor.

- **Create missing sites, buildings and floors** – allows sites, buildings and floors to be created by importing values which don't already exist in the project structure. Anything which doesn't match exactly to the existing structure will be created as new so pay particular attention to spelling and formatting to avoid creating duplicates.

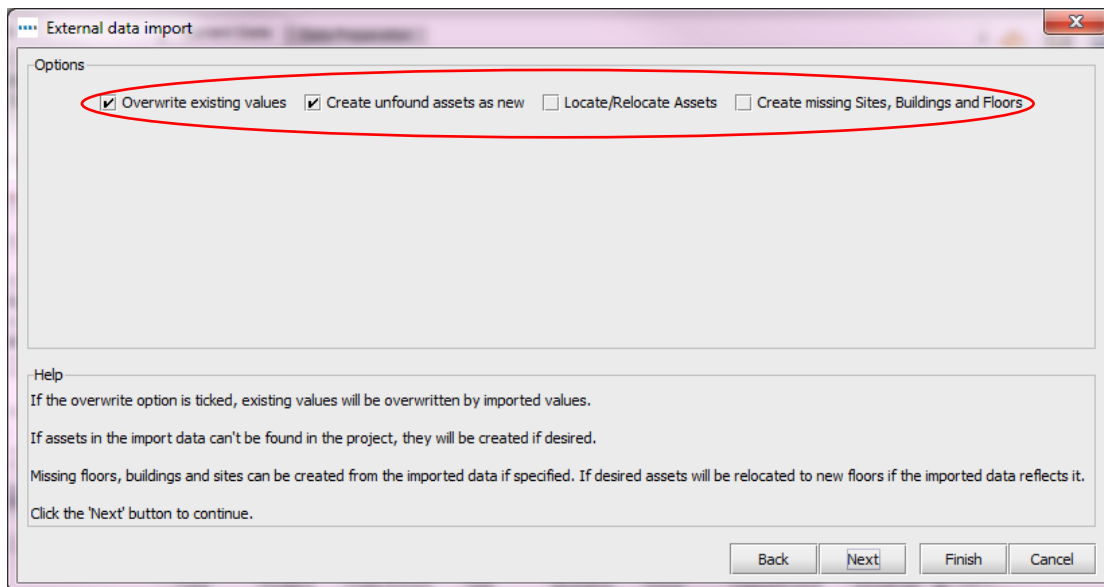


Figure 61. External data import options

Make selections as appropriate for the way you want to import the data and then click “Next”. A summary of the assets to be amended and/or created will be displayed. The assets shown on the left-hand side of the dialogue box displayed can be selected and a breakdown of the changes to be made will be shown on the right-hand side.

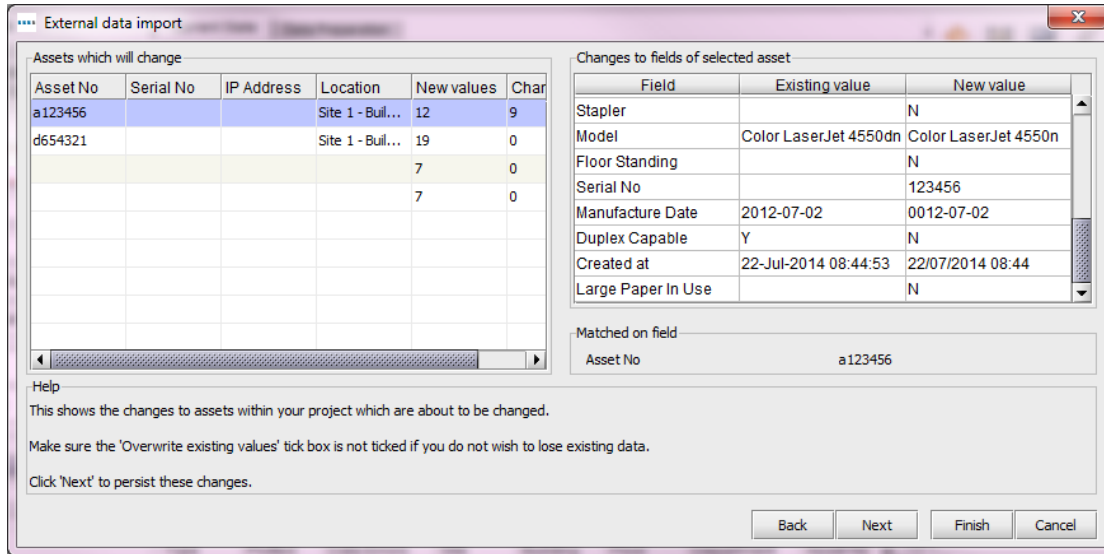


Figure 62. Changes after import summary

On clicking “Next”, all data will be imported into the project and a summary of the changes made will be displayed.

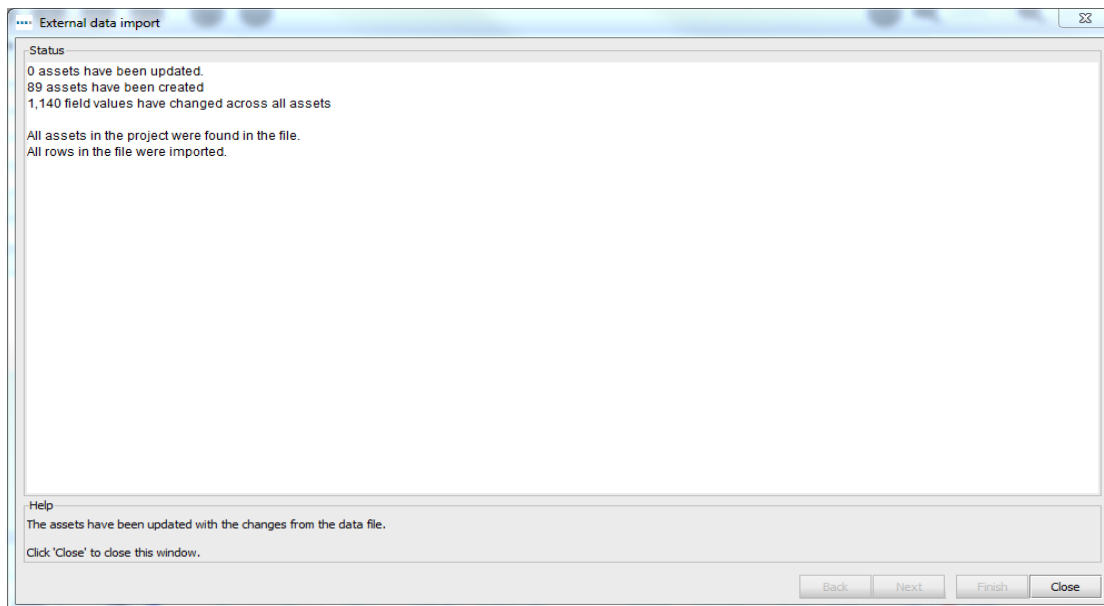


Figure 63. Changes after import summary

On clicking Close the dialogue will close and work can proceed on the project using the new values and data imported.

Note: After matching the data fields and clicking “Next”, you may see a Warning screen rather than the information about assets that will change as shown in Figure 63. This means either that there will be changes to your data that need special attention (like, for instance, assets being relocated to another floor and therefore being unmapped from their previous location as in Figure 64) or, more importantly, that there are errors in the data that will prevent it from being imported.



In the event the warning message states that the data will not be imported, you will need to review and amend your data file outside Asset DB to address the issues and then repeat the import process to successfully add the data to the project.

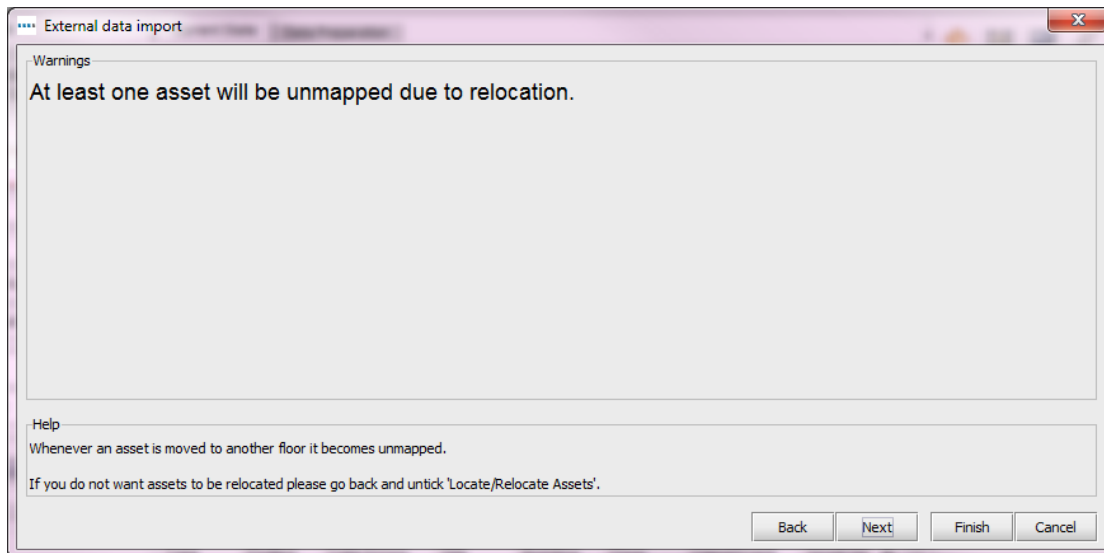


Figure 64. External data import warning summary

17.2.2 Using External Data before Mapping

If you have not yet mapped devices, you can still import external data. Import the data as described above, and tick the Create unfound assets as new box. You will see a popup telling you how many new devices have been created as seen in Figure 65.

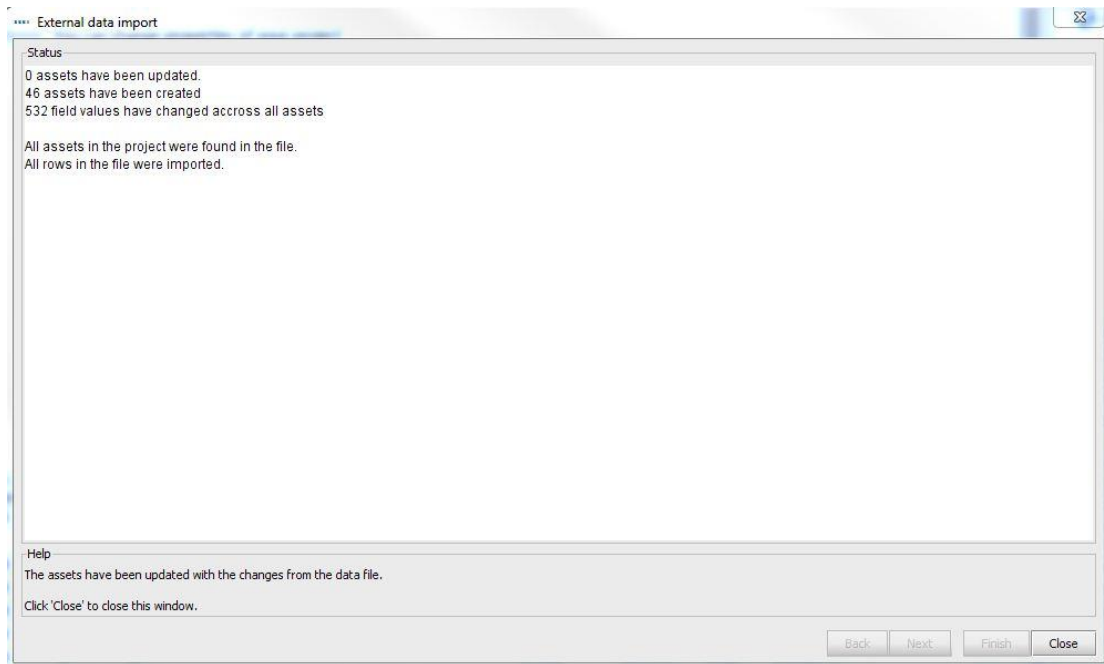


Figure 65. Assets created

Click Close to view these assets on the table. Refer to section 10.3 for more information on how to plot these devices.

You can run a TCO from this point without mapping the devices. All unplotted devices with a type assigned will be included in your TCO.

Top Tip: If you are going to sync your project to the Asset DB Cloud, be sure to relocate any unmapped devices to a floor. They do not need to be physically plotted on this floor but they will not synchronise without floor details.

17.2.3 Date format when importing External Data

It is possible to use a date column in the import file to indicate the date a meter reading was taken. If your data file doesn't record the date of a meter reading in the column header but in a column itself, click the Mark as Meter Readings Date button (see Figure 58) to indicate that the dates for your readings are to be taken from that column.

Once you match a field containing a meter reading date, in most cases Asset DB will automatically detect the appropriate date format to match the format in the import file. If the format is not detected automatically, the dropdown shown in Figure 66 allows the user to change the date format manually.

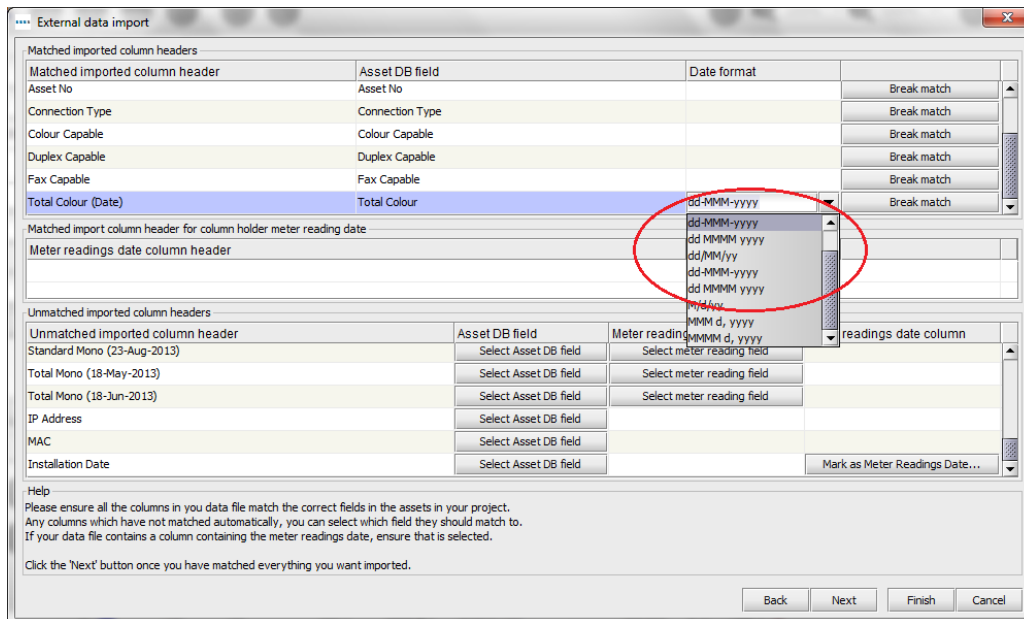


Figure 66. Specifying date format for import

The date format used by Asset DB is a pattern. It is used to interpret the dates provided in the file you are importing. As dates can be written in very different formats (e.g.; 1-12-80 or Dec/1/1980), only the correct pattern will be interpreted as the correct date. The process of reading the date text in the file is called 'parsing'.

Within the date format certain letters are used to mean different aspects of the date (e.g. 'y' for year, 'a' for 'am' or 'pm'). These letters are case sensitive as the different case letters do mean different things in some situations.

Letter	Date or Time Component	Presentation	Examples
y	Year	Year	1996; 96
M	Month in year	Month	July; Jul; 07
d	Day in month	Number	10
E	Day name in week	Text	Tuesday; Tue
u	Day number of week (1 = Monday, ..., 7 = Sunday)	Number	1
a	Am/pm marker	Text	PM
H	Hour in day (0-23)	Number	0
h	Hour in am/pm (1-12)	Number	12
m	Minute in hour	Number	30



Letter	Date or Time Component	Presentation	Examples
s	Second in minute	Number	55
S	Millisecond	Number	978
z	Time zone	General time zone	Pacific Standard Time; PST; GMT-08:00
Z	Time zone	RFC 822 time zone	-0800
X	Time zone	ISO 8601 time zone	-08; -0800; -08:00

Using the example date of 21st July 2014, there are some different format examples below:

Date in File	Pattern
7/21/14	M/d/yy
21/7/14	d/M/yy
21 Jul 2014	dd MMM yyyy
21.07.14	dd.MM.yy
2014-07-21 16:05:36	yyyy-MM-dd HH:mm:ss
July 21, 2014	MMM dd, yyyy
7/21/2014 4:05:36 PM	M/d/yyyy h:mm:ss a
Monday, 21 July 2014 (BST)	EEE, dd MMM yyyy (Z)

Asset DB will usually recognise the correct date format and use that automatically. An example of a situation where you may need to specify the date pattern manually is where there could be confusion between the UK pattern “d/M/yy” and the US pattern ‘M/d/yy’. Staying with the example date of 21st July 2014, the fact that the “d” value is 21 means that 21/7/14 would be correctly interpreted as following the “d/M/yy” pattern. However a date value of 2/7/14 in a file could be interpreted either as 2nd July 2014 using the UK pattern or as 7th February 2014 using the US pattern, so there may be occasions when verifying the selected pattern and even amending it manually could be very important for the accuracy of your data.

17.2.4 Import Asset DB Data

Asset data that has been entered manually into Asset DB and/or previously imported from an external source can be exported from Asset DB and modified in a spreadsheet editor at any time.

To export data, choose menu option Project > Export > Asset DB Data, select the desired format and export options, choose OK and select an appropriate location and file name for the generated file.

Changes can then be made in a spreadsheet editor, the file saved and re-imported into Asset DB via menu option Project > Import > Asset DB Data.

**Important notes:**

- Project > Import > Asset DB Data can only be used to re-import files previously generated by exporting data from the same Asset DB project. External Data cannot be imported via this option.
- No changes can be made to data contained in the `_ID_` or `_TYPE_` columns. These contain important system data used by Asset DB and any changes made to data in these columns will not be imported.
- When importing Asset DB Data, no data relating to building, site or floor location, asset type or asset category can be changed via import. Any changes to these attributes must be made within the software.

There is one exception to being able to import new columns into Asset DB from a Project > Import > Asset DB Data function. New meter readings can be imported into the date grid format by inserting a new column, copy/pasting the column heading from a previous meter reading heading and then changing the date.

For example: Copy the standard format column name B&W Large (21-Nov-2008), paste into a new excel column and change the date to the date of the new meter reading. A Project > Import > Asset DB Data function will now create a new meter reading under this date for the updated asset.

17.3 CSV Data Format

When data is imported into or exported from Asset DB using the CSV format the data values are usually separated by commas. However under some circumstances it might be desirable to use a different character to separate the values, for example in countries where the comma symbol is used as a unit separator for numerical values. Asset DB provides an option to configure the default CSV delimiter character via Options > General Options > Data (see Figure 67).

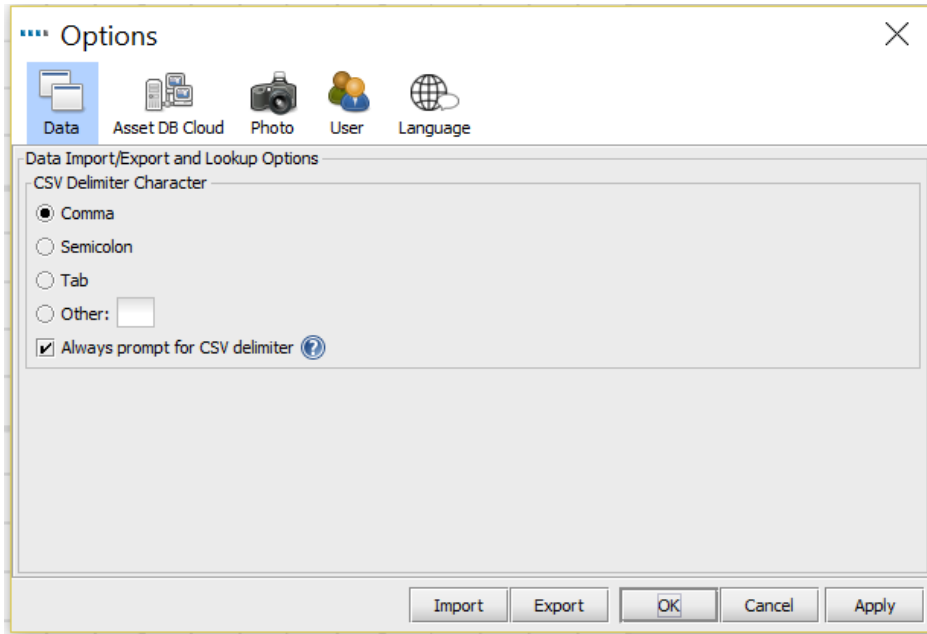


Figure 67. CSV Options Dialogue

The selection made in this dialogue will be applied to all Asset DB operations using the CSV data format. If the Always prompt for delimiter option is ticked Asset DB will always ask for the delimiter symbol to use whenever a CSV format operation is to be performed.

17.4 External Data Lookup

Asset DB provides the functionality to lookup data from any CSV document and map the data found into the appropriate fields. This feature is designed to be used with all discovery tools (Web Jetadmin, Centware Web, PrintFleet etc.).

You can lookup multiple CSV files at one time using Options > Lookup Configuration. In the window that appears, click Add to add a new file. This will launch the External Data Lookup Setup window as shown in Figure 68.

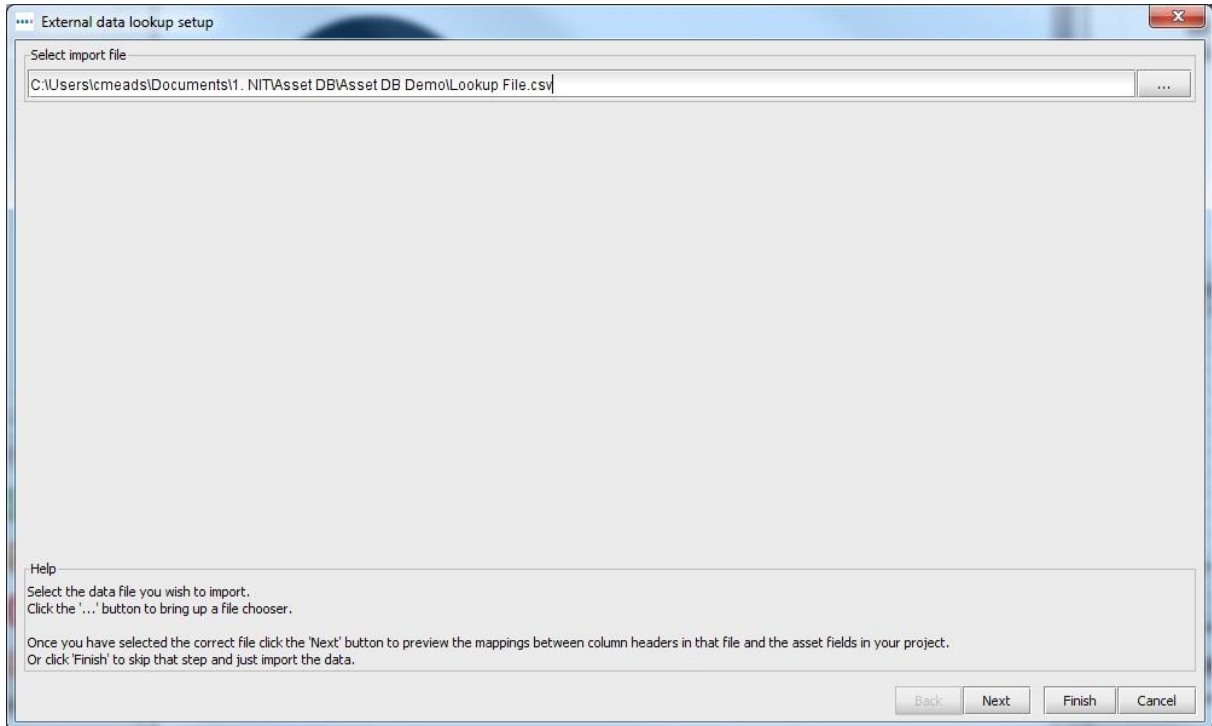


Figure 68. CSV Options Dialogue

The Help section at the bottom of the screen will walk you through each step of the process, the first of which is to select your file.

The next window will show you a list of all the fields that Asset DB has managed to automatically match at the top of the screen and all unmatched fields at the bottom. You can choose which fields within Asset DB relate to fields in your data using the Select Asset DB field button in the bottom section. Any incorrect or unwanted matches can also be unmatched in the top section by clicking Break Match.

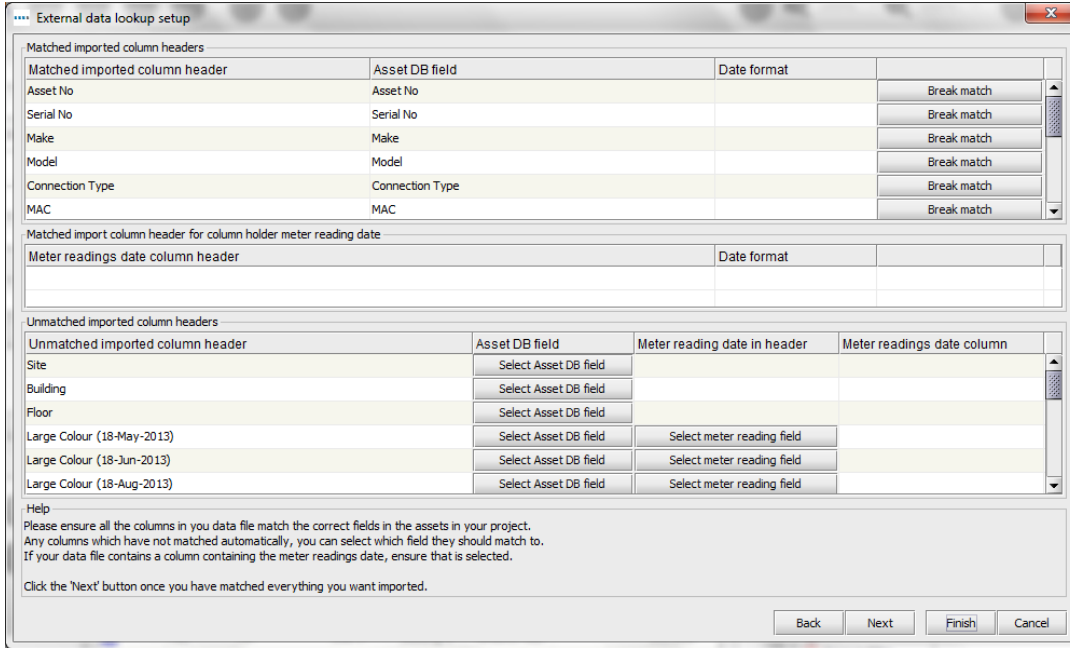


Figure 69. Lookup data file column matching

If your file includes meter readings and the date of these readings is not picked up by Asset DB, the next screen will allow you to select the date the meter readings were taken.

To populate the fields in your lookup file for a device, a unique piece of information must be added to a field with a lookup (magnifying glass) icon next to it.

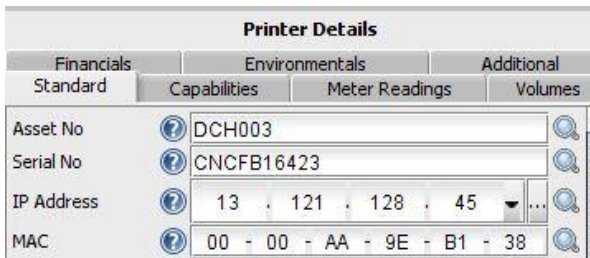


Figure 70. Lookup function

Once you have entered an Asset Number, Serial Number, IP Address or MAC Address you should press the magnifying glass icon. The lookup will then scan the CSV files you have defined in the previous step and look for a match in the data. Once a match is found it will populate the remaining fields automatically.



18 Exporting Floor Plans

The floor plan images may be exported to PDF or JPG format exactly as they appear in Asset DB, i.e. the appearance of the floor plan as seen in the main window of Asset DB (including the icon size, filters, indicators etc.) will be exactly what is seen in the exported PDF or JPG.

To export floor plans go to Project > Export > Floor Plans. A pop-up will appear allowing you to choose which floor to export (see Figure 71).

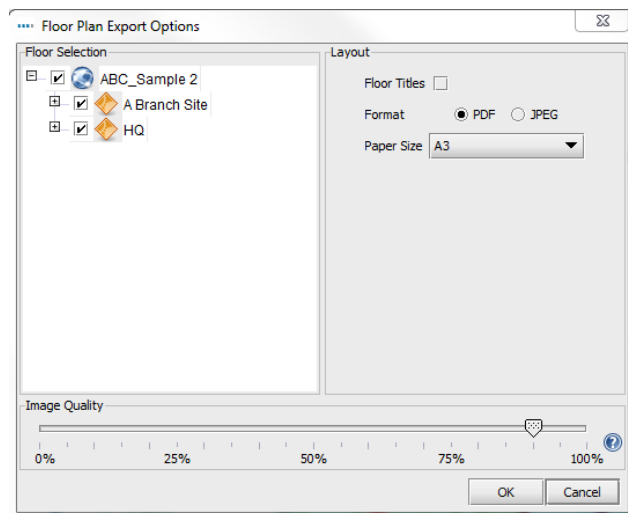


Figure 71. Floor plan export dialogue

The layout section in the top right of the pop-up allows you to choose a file format and paper size for your export. This is useful when the floor plan files that have been imported into a project differ in size.

The quality of the exported images can be controlled via the Image Quality slider, with a higher image quality resulting in bigger file sizes.

Note: Floor plans can also be exported to JPEG format on an individual basis by right clicking on the floor plan in the main window and selecting Export Floor Plan or by going to Project > Export > Selected Floor Plan

19 Icon Customisation

Asset DB allows you to customise the data fields associated with each asset type, the order in which they are displayed and the colour of each type of icon on your floor plans. You can customise icons for a single project or you can define a default set of customised icons for use in all subsequently created projects. This feature can be accessed via menu option Project > Customise Icons. You will then have the option to customise Current Project (i.e. the project you



currently have open in the software) or the Default Project, which will allow you to define the standard icons to be used in subsequently created projects.

Once you have made your selection, the following dialogue will be displayed:

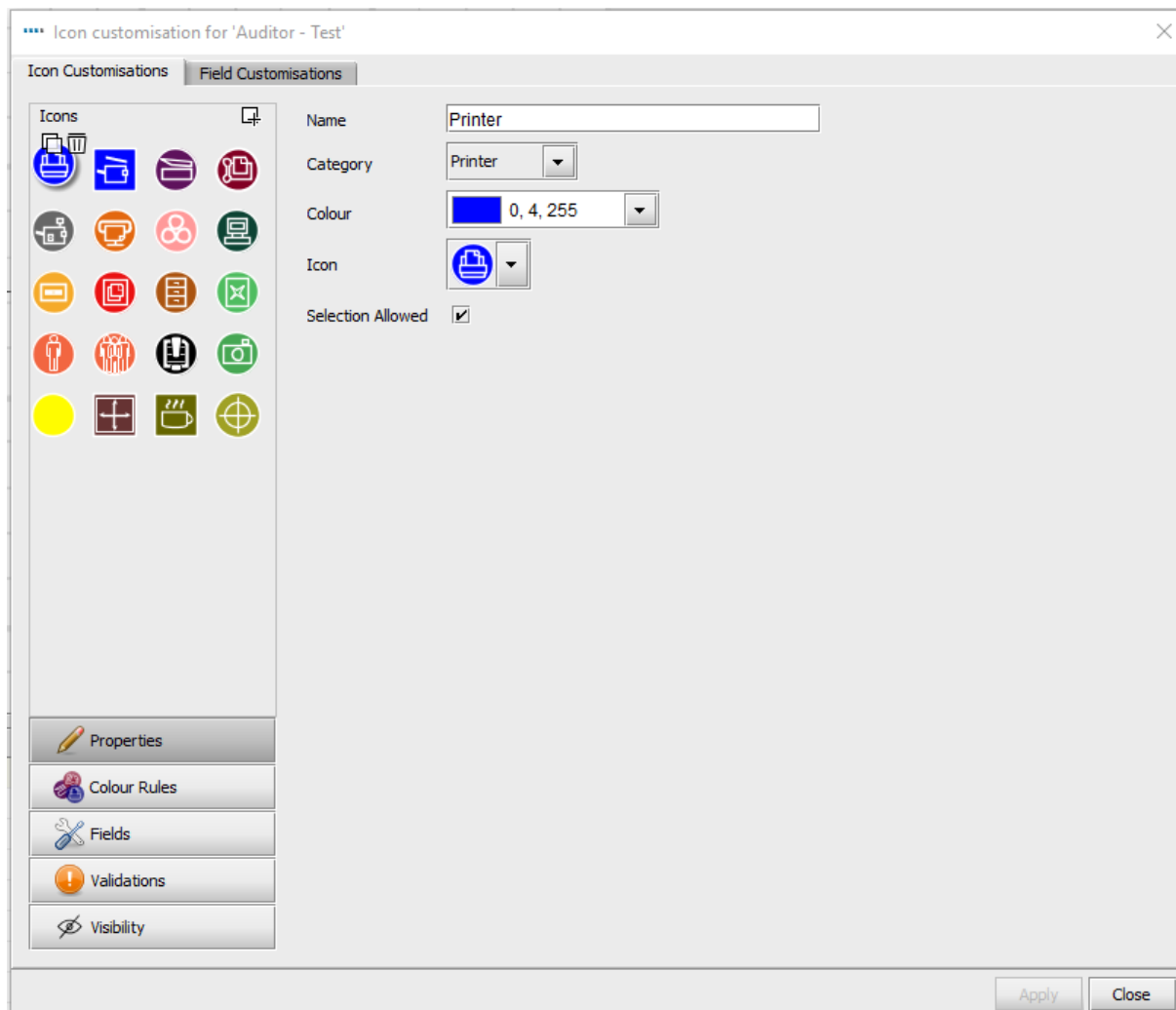


Figure 72. Icon customisation dialogue

19.1 Icon Customisations

The first tab, called Icon Customisations will allow you to edit the icons as they are displayed on floor plans, define colour rules, choose which fields are displayed for each asset type, the order in which these fields are displayed, whether the content entered into fields should be validated and if fields should be showed as standard or whether their visibility should be subject to the data entered into other fields.




19.1.1 Icons


The Icons panel in the top left of the window allows you to edit the icon as it will be displayed by default in the software. The icons available by default in Asset DB are shown here:




Figure 73. Available icons

To create a brand new icon, click the Add button  in the top right-hand corner of the Icons panel. This will create a brand new Icon and the properties to be decided will be shown to the right of the Icons panel.

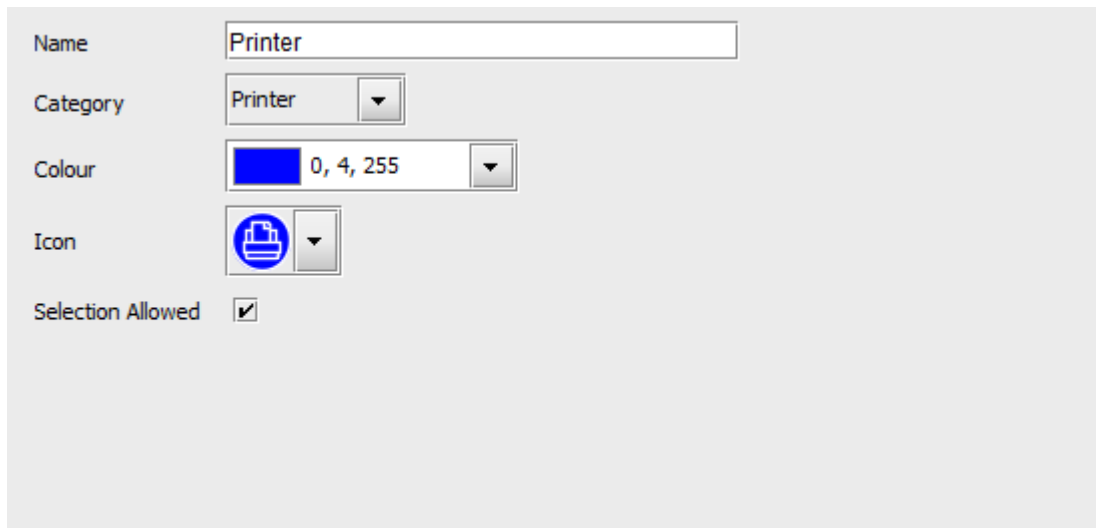
To select a pre-existing icon for editing, simply click on it in the Icons panel.

To create a new icon based on a pre-existing icon, select the icon you wish to copy and click the Copy button that appears above the icon .

To delete an icon, simply click the icon to be deleted and click the Delete button that appears next to it .

19.1.2 Icon Properties

In each case, the properties of the icon selected, copied or created can be decided in the area to the right of the Icons panel.



Name	<input type="text" value="Printer"/>
Category	<input type="text" value="Printer"/> ▼
Colour	<input type="color" value="0, 4, 255"/> ▼
Icon	<input type="text" value="Printer icon"/> ▼
Selection Allowed	<input checked="" type="checkbox"/>

Figure 74. Icon properties

- Name – Name of Icon (e.g. Printer)
- Category – Asset type represented by this icon (e.g. Printer, MFD etc.)
- Colour – Default display colour of this icon in software and on floor plans
- Icon – Image to be displayed on this icon
- Selection allowed – Tick to permit use of the icon in the project.



19.1.3 Colour Rules

The Colour Rules button allows rules to be defined to change the colour of an icon on floor plans, depending on the data entered into one or multiple fields.

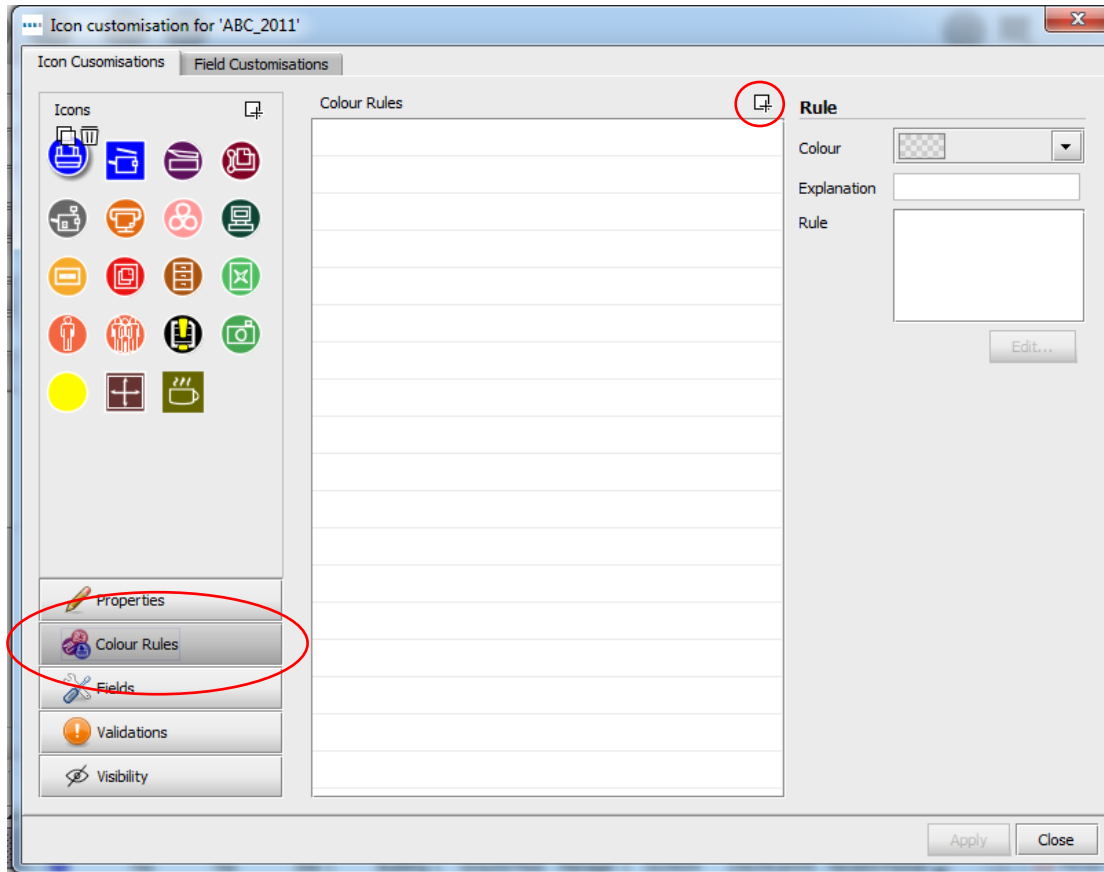
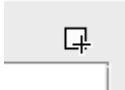


Figure 75. Colour rules view

To create a new colour rule, click the Add button above the Colour Rules panel . A new rule will be displayed in the Colour Rules list and properties can be defined to the right of the list.

- Colour – the colour to be applied if criteria are met. *The default colour for the selected icon is chosen by default – this should be changed.*
- Explanation – A brief explanation of the rule being edited can be entered here.
- Rule – An explanation of the criteria to be fulfilled in order to apply the colour rule. Click the Edit... button to define criteria. Please note rules cannot be typed into this field.

Multiple colour rules can be defined for a single icon by clicking on the Add button and defining further rules. Rules will be applied in the order in which they appear in the Colour Rules list. Figure 76 below shows how to define criteria.

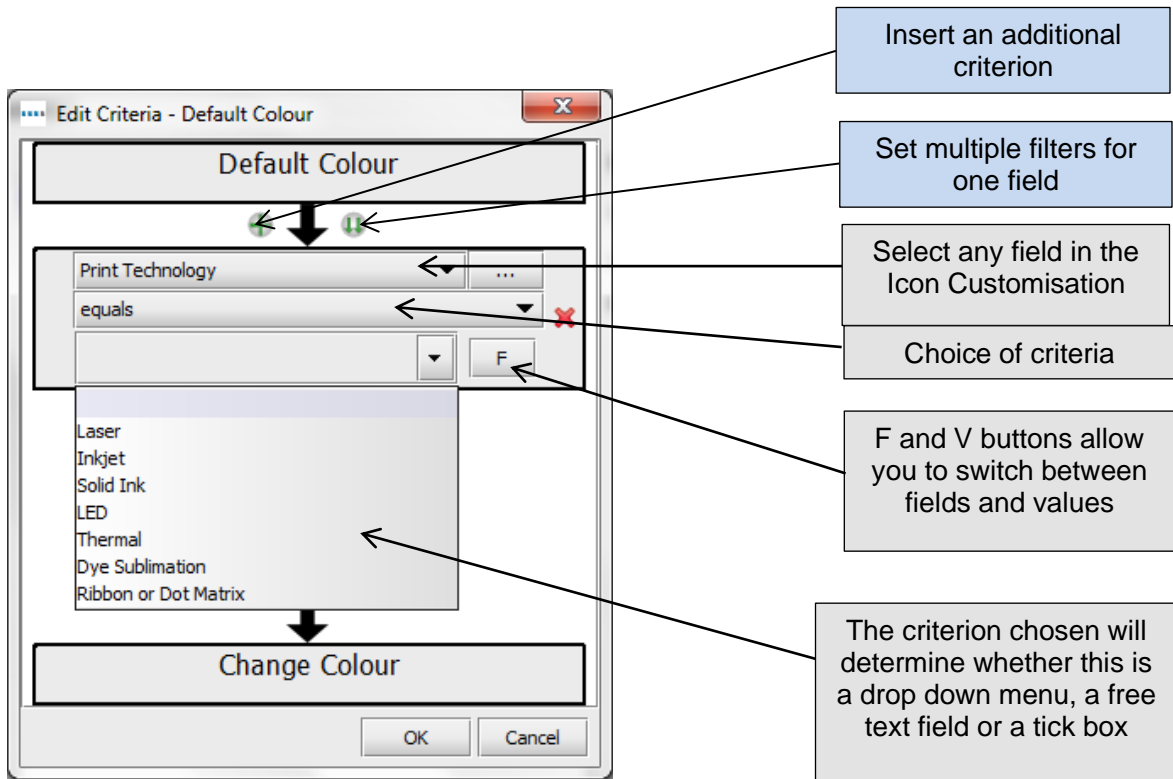


Figure 76. Edit Colour Change Criteria

Rules can be reordered by dragging them in the list and deleted by selecting the rule to be deleted and clicking the Delete button

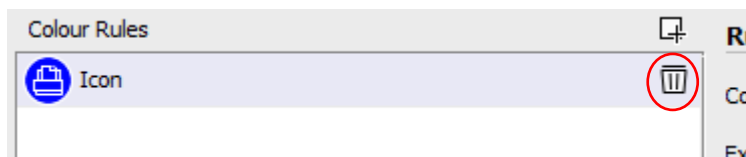


Figure 77. Delete rules

19.1.4 Fields

The Fields button allows for the definition of the tabs and fields displayed in the Asset Details area (left-hand panel of Current State tab). Fields are displayed according to the groups defined (this is explained in Section 19.2).

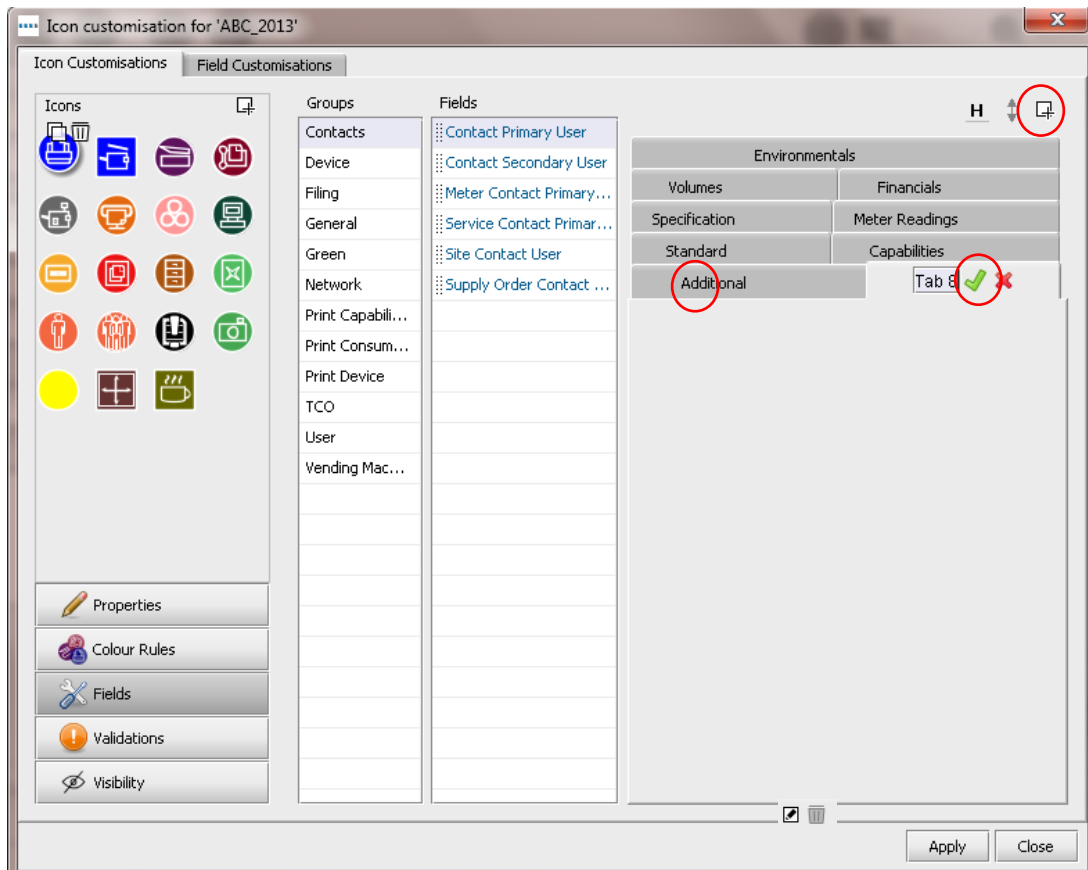


Figure 78. Fields view

To create a new tab, click the Add button in the top right-hand corner of the Icon customisation dialogue.

Tabs are displayed in the same way in which they will appear when mapping assets in Current State.

Existing tabs can be renamed by clicking the Edit button, typing the desired tab name and clicking Accept. Tabs can be deleted by clicking the Delete button.


The order in which fields are displayed on each tab can be edited by clicking on the field in question and dragging the field to the desired position.

To insert a field not currently available in the selected tab, choose the field to be added from the Fields list and either drag it to the desired position on the tab or click the field once in the list and


then click the Use button






To add a space between fields, click the Add gap button at the top of the dialogue . This will add a new gap to the bottom of the fields in the selected tab, which can then be dragged to the desired position in the same way as fields can be re-ordered.

Section headings allow you to group your fields together in the details panel. To add a section

heading to a tab, click the Add Heading button . This will add a new heading in bold font to the bottom of the fields in the selected tab, which can then be dragged to the desired position in the same way as fields can be re-ordered. To rename the heading, double click it, type the desired heading and then press Enter on your keyboard.

User-added fields can be deleted at any time by selecting the desired field and clicking the Delete

button .

19.1.5 Validations

It is possible to define validation criteria for the data entered into asset fields. This is ultimately a check to ensure that the data entered into that field is valid. If the data criteria are not met for a field with validation, the field will be highlighted in red during data capture and a warning dialogue box will be displayed when the changes are committed.

To set validation criteria for a field, click the Validations button in the bottom left of the window (see Figure 79). Tabs and fields available for the selected icon will be displayed. To set validation criteria, select the field to which the criteria are to be applied and click the Add button in the top right-hand corner. A new validation rule will be added to the list of rules in the Validations section.

Below this, in the Criteria section the Message field is for the message to be displayed in the warning dialogue box should the validation criteria not be met. The actual validation criteria can be set by clicking the Edit... button.

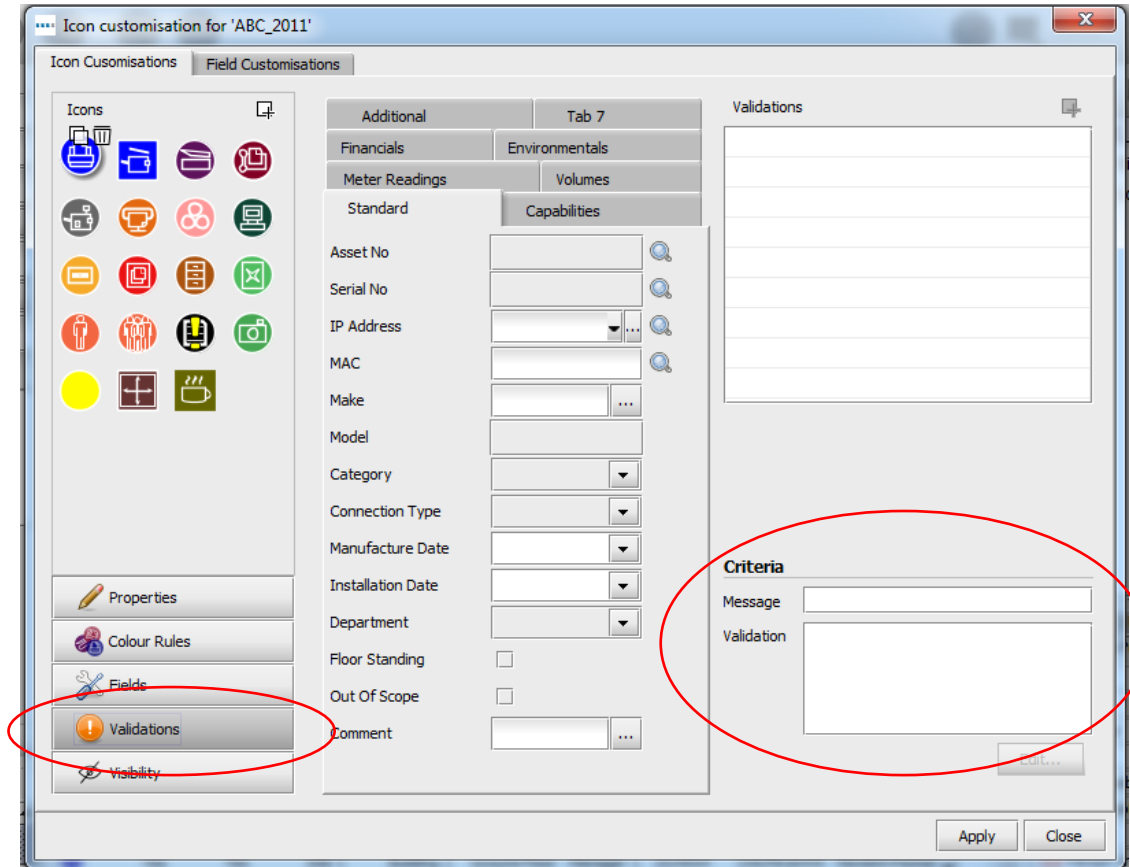


Figure 79. Validations view

19.1.6 Visibility

By clicking the Visibility button in the bottom left, dependencies can be created between fields so they only become available for data entry if specific data is entered in another field. For example, the Scan In Use field could be set to be visible only if the Scan Enabled field is ticked. This can help to keep things clear for auditors and reduce data errors.

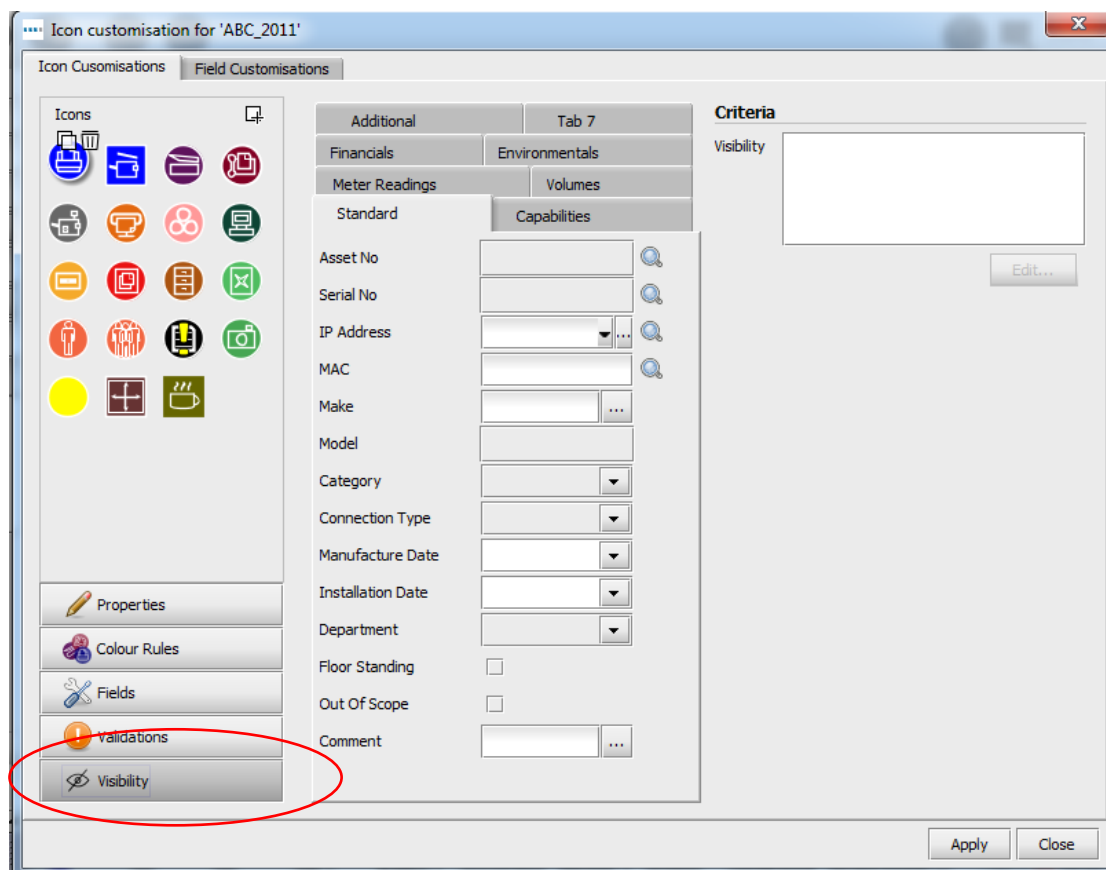


Figure 80. Visibility view

To define these criteria, select the field that should be shown/hidden should certain criteria be met and click the Edit... button.

Criteria can then be defined that, should they not be met, will prevent the selected field being displayed.

19.2 Field Customisations

The second tab in the Icon Customisation dialogue is the Field Customisations tab, in which new data fields can be created for use in the tabs associated with each icon type.

On the left hand side of this tab is a list of groups, into which fields with a similar use can be placed for easy relocation later. For example, in the Network group, fields such as DHCP Enabled, IP Address, MAC, Subnet etc. can be found.

In order to create a new group, click the Add button above the Groups panel .

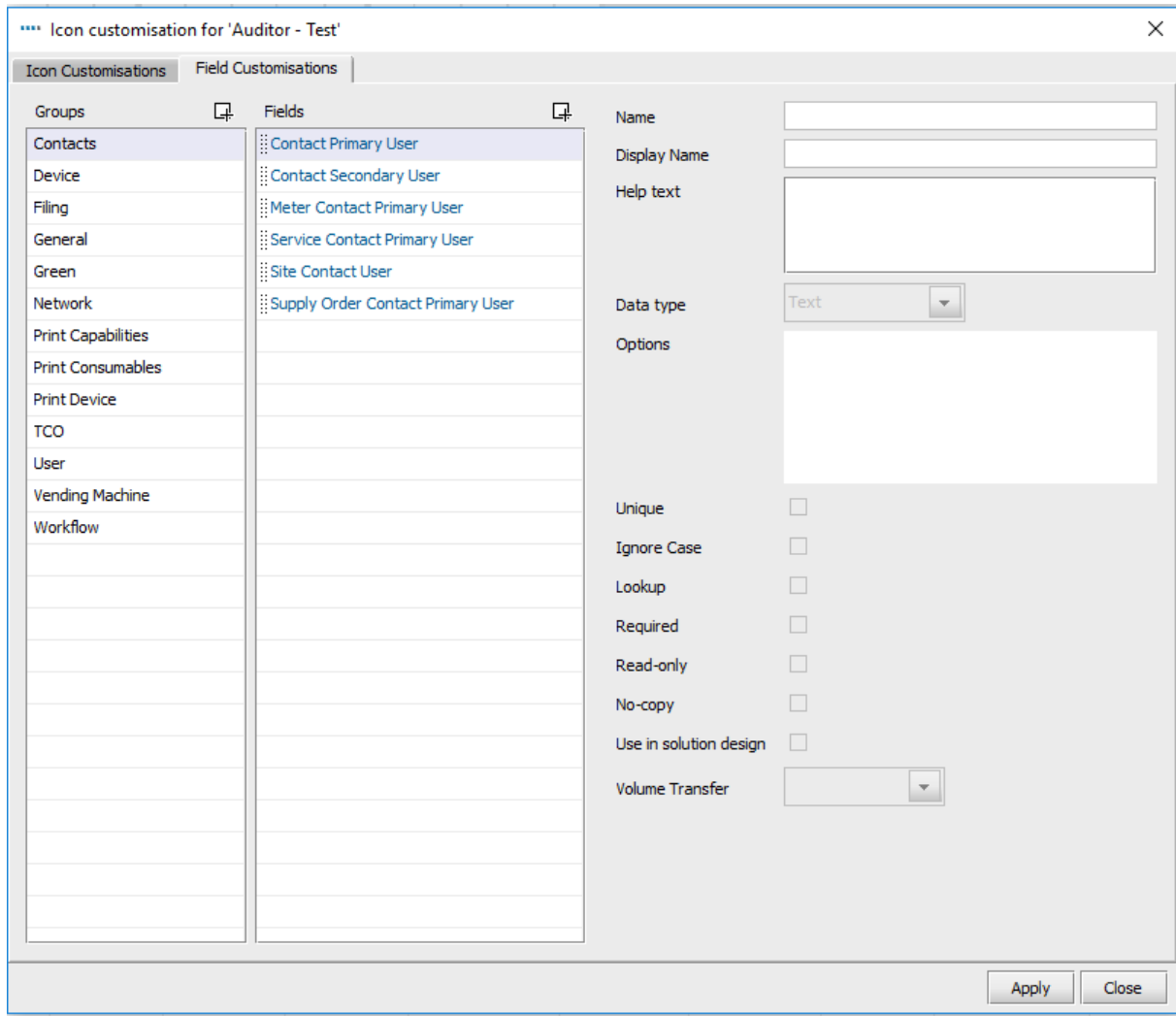



Figure 81. Field Customisations tab






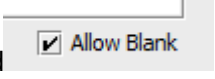
To the right of the Groups list is the Fields list. This list shows all fields contained in the selected group. Fields cannot exist in more than one group at a time. If there are two fields with the same name but in different groups, please note that the fields are different and cannot be used interchangeably.

To add a new field to a group, click the Add button above the Fields panel . A newly created field will be named User Field by default and will be displayed with black text in the Fields list. Pre-defined fields will be displayed in blue text.

To edit an existing field, click to select it in the Fields list.

To the right of the Groups and Fields lists, the attributes for each field can be viewed and edited. The following fields can be edited:



- Name – This is the unique name of the field used by Asset DB to identify each field. The name used here will also be used as a column header in the Asset DB Data export file.
- Display Name – The name to be displayed in the software to identify the field.
- Help text – The text to be displayed should the user click the Help button 
- Data type – The type of field to be created. There are a number of options in this list. For types Drop Down and Editable Drop Down, the options available in the list can be managed in the Options list below the Data type field.
- Options - Where appropriate, Options can be added by clicking the Add button . Once the option has been entered, click the Accept button . Options can be edited later using the Edit button  and deleted by clicking the Delete button . The order in which options are displayed in a drop down list can be edited by clicking and dragging the fields into the order desired. Below the Options, a tick box allows or blocks a Blank entry in this field .
- Unique -- Requires the content of the field to be unique in the entire dataset. No duplicates between any assets will be allowed in the project.
- Ignore Case – Ticking this box will mean that the field is not case sensitive.
- Required – Enforces the entry of data into this field. Asset changes will not be saved unless data is entered into this field.
- Read-only – Disallows editing of this field in the software. Data will only be able to be entered into this field via data import from an external source. Manual changes will be disallowed.
- No-copy – Ticking this box will ensure that the contents of this field are *not* copied when an asset is copied in its entirety using the copy and paste functionality.
- Use in Solution Design – When this box is ticked, the selected field is carried through to the future state icon set. This option will be enabled for all fields that meet the following criteria:
 - The field is not already present in the Asset DB default set of fields for Future State.
 - The field is not a meter reading or gallery field.
 - The field is not populated by volume generation on the project.
- Volume Transfer: This option will be greyed out until the “Use in Solution Design” box is ticked. Once it is available, the dropdown menu will allow you to specify how these fields behave in the Solution. There are different choices depending on the input in “Data Type” :
 - Do nothing – The value won’t be visible in the Future State field.
 - Overwrite – The source value supersedes any other value in the Solution Design field.
 - Update If Empty – The source value will be visible in the Future State if the field in the destination is empty.
 - Update If Unchecked – The source value will be shown in the Future State if the checkbox or the option selected is different (e.g. The source value is “Yes” but the value included in the Future State is “No” or empty. The field will show “Yes”).
 - Keep Max – The source value will be shown in the Future State field if it is larger than the destination value.
 - Keep Min – The source value will be shown in the Future State field if it is smaller than the destination value.



When the box “Use in Solution Design” is selected, the field will be present and populated in the Device Fate report.

For pre-existing fields, the Name and Data type are not editable attributes. For Drop down and Editable Drop Down-type fields, the options are not editable.

The same restrictions are placed on user created fields once the Apply button has been clicked after their creation. Once changes to the icon customisation set have been saved, they are no longer editable. This restriction is enforced to ensure no data is lost, should the contents of fields in pre-existing data-sets be incompatible with newly chosen data types.

It is strongly recommended that no changes be made to Current Project icon customisations if the project already contains asset data. Changing icon customisations and fields can pose a risk to existing data and can cause data to be hidden in Asset DB.

20 Importing and Exporting Backups

Backups of the data held within Asset DB can be made using the File > Export > Project menu option. This process may take some time depending on the size of the project. The resulting file contains all floor plans, thumbnails and data and can then be shared with other Asset DB users.

Exported projects can be imported using the Import function described in Section. Please note that this function should only be used for opening backup project files rather than during everyday use of projects you already have available in your version of Asset DB when the Open function will be more appropriate.

Top tip: If you have access to the Asset DB Cloud you can back up your project data by synchronising with the server instead (see Section 22.2).

21 Organising Projects

Asset DB allows you to delete and duplicate projects from your local PC. The facility for this is under the File > Organise > Projects menu. You can sort, filter and search for projects in the Projects window (see Figure 82). As seen in the figure overleaf, the column on the left is for selecting multiple projects. You can sort any column by selecting the header.

To delete your project, highlight the project you would like to delete and click the Delete button at the bottom of the screen to confirm. This should be done with caution and we would advise that you export your projects and save them outside Asset DB beforehand if you think you will need to access them again in the future. If you have an export available, you can then reimport a project at a later date.



The same process should be used to duplicate your project by highlighting the project and selecting Duplicate³. A popup will appear for you to rename the project at this time. Give the copy a new name or a new version to help distinguish between the copy and the original. This is a very useful feature for creating proposed scenarios without affecting the original project.

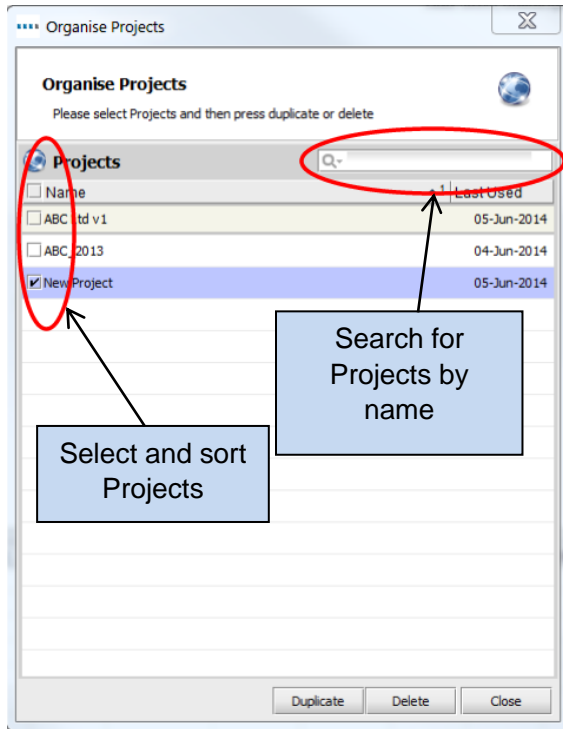


Figure 82. Organise projects

The same process can be used to duplicate TCOs, Green Calculations, and Solutions.

³ Duplicate project functionality is not available with all licence types



22 Asset DB Cloud

An additional function within Asset DB is the ability to synchronise projects to the Asset DB Cloud (formerly called the Enterprise Server). This has many advantages:

- i. Backing up your projects
- ii. Allowing other Asset DB users to share project files, based upon the permissions set on the project by the administrator
- iii. Allowing many auditors to collaborate on a single project and share data
- iv. Ensuring the same latest project file is available to multiple auditors before going to site.

It is recommended that before starting work on an existing project you synchronise with the Asset DB Cloud to ensure you are working with the latest changes.

22.1 How to connect to Asset DB Cloud

To access the Asset DB Cloud you firstly need to configure Asset DB to point to the correct location by going to Options > General Options and clicking on the Asset DB Cloud tab. This information should only need to be set once when accessing the server for the first time.

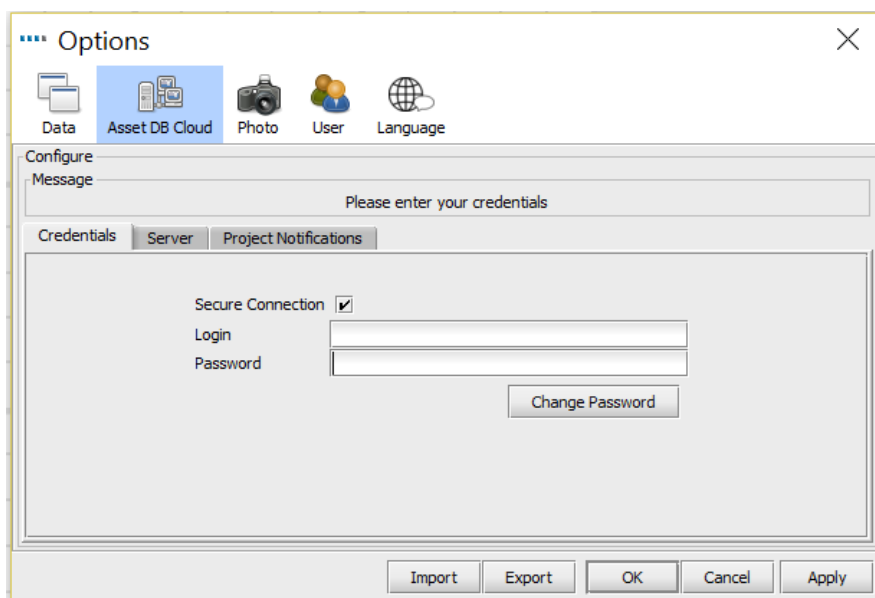


Figure 83. Specifying credentials if connecting securely



As shown in Figure 83 and Figure 84, the following should be specified:

1. Login / Password (only if connecting securely using HTTPS).
2. Server Name – This is the host name or IP address of the server on which Asset DB Cloud is installed. Your IT Administrator can give you this information.
3. Port – This is the port that the server will be listening on. There is no user authentication and data sent to the server will not be encrypted.
4. Secure Port – Same as port but sends your projects securely using HTTPS.
5. Proxy Details (optional) – If you access your internet connection through a proxy server please enter the details here.

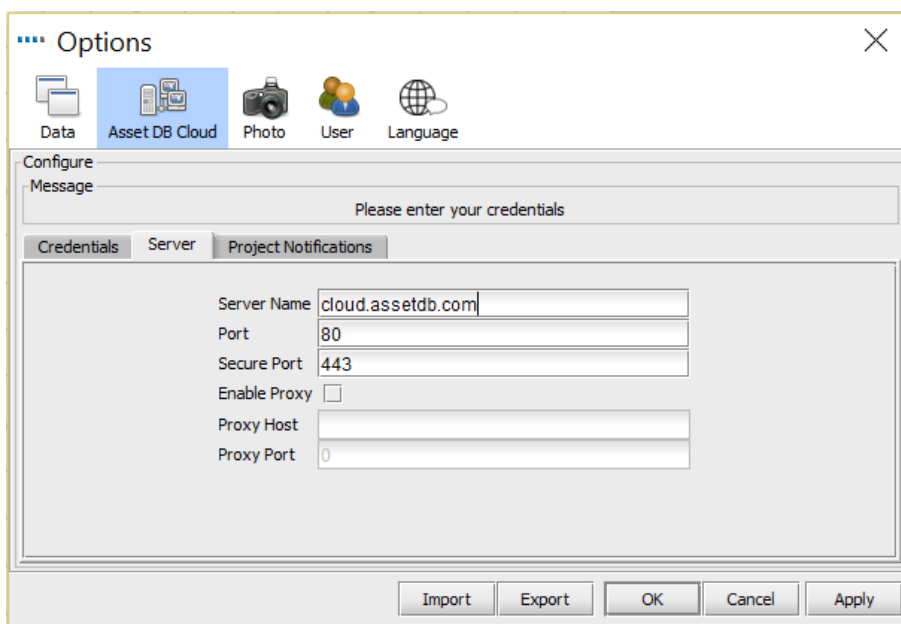


Figure 84. Configuring connection details

22.2 Synchronising Projects

If a project is open in Asset DB, it can be synchronised to the Asset DB Cloud directly by choosing menu option Project > Synchronise. You will be asked to confirm the synchronisation. If you answer 'Yes' the currently open project will be synchronised with the server.

To download new projects or to check the status of one of the projects already on your computer, go to File > Synchronise. You are presented with a pop-up confirming which server you are connected to and the list of projects available to you (see Figure 85).

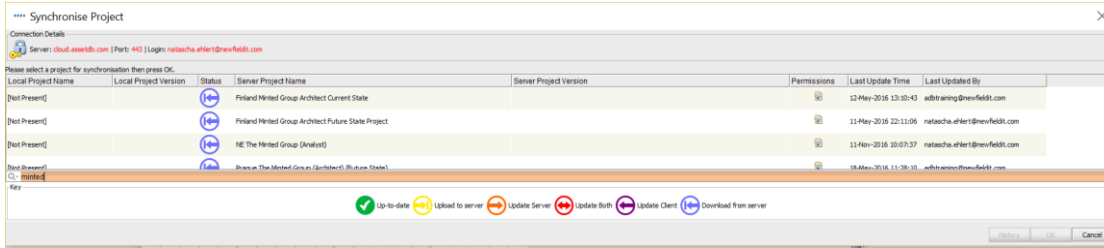


Figure 85. Asset DB Cloud synchronisation pop-up

Additionally, this will show you for each project - its version number (as it appears in the project details panel in your project), the permissions you have for it and its synchronisation status:

- Up-to-date – the client and server are both up to date
- Upload to Server - the client has a new project which is yet to be uploaded to the server
- Update Server – the client has new changes to be uploaded to an existing project on the server
- Update Both – both the client and server have available updates to an existing project
- Update Client – the server has available new changes to be downloaded to the client
- Download from Server – the server has new projects which are yet to be downloaded to the client

Below the list of projects available locally and in your group(s) on the Asset DB Cloud, there is a search field, which allows searching on all fields displayed in the Synchronise Project window, i.e. Project Name, update date/time and Last Updated By username.

Once you have selected a project to synchronise, you will receive a pop-up enabling you to enter a message (see Figure 86). Then click Yes and your project will synchronise to the Asset DB Cloud.

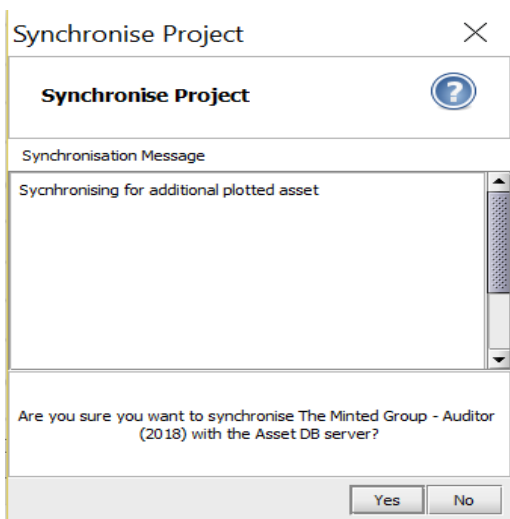


Figure 86. Synchronisation text message



Whoever synchronises the project next can then select History in the synchronisation pop-up once the project is selected (Figure 87) and then look at the projects history and synchronisation messages in the pop-up that follows (Figure 88).

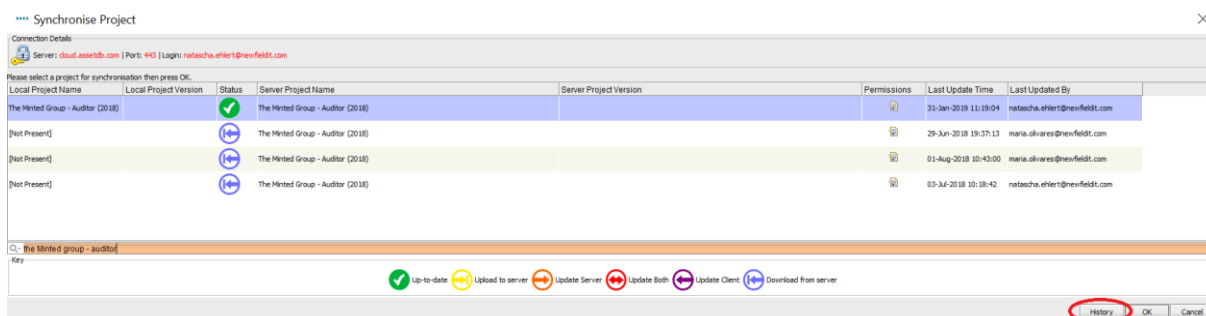


Figure 87. Synchronisation history option

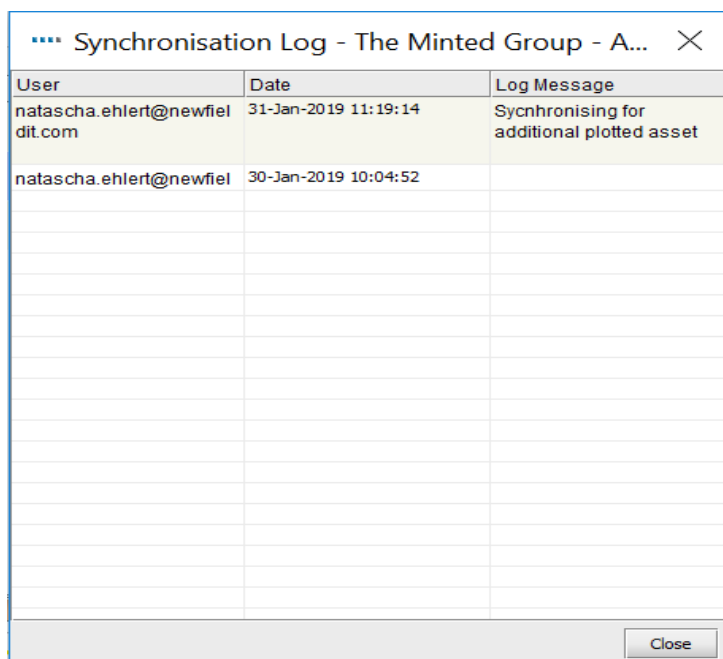



Figure 88. Synchronisation History

Asset DB Cloud supports field level synchronisation. This means that if two auditors/consultants have updated the same asset, changes from both computers will be merged. If the same field has been updated then data from the last synchronisation will be sent to the server as the final value.

For each project the time at which it was last modified on the server is shown along with the login ID of the person who made the modifications.



22.3 Project Notifications

If you have entered your Asset DB Cloud credentials in the General Options, then the  symbol in the toolbar in the top right of the work space will change colour when projects that you have recently synchronised have been updated on the server. Clicking on the button will display a list of the projects which have been modified with details about how many changes were made to them and when. Hovering over a list item gives you the option to clear the notification, synchronise the project or stop watching it – you then won't receive any more update notifications for this project (see Figure 89).

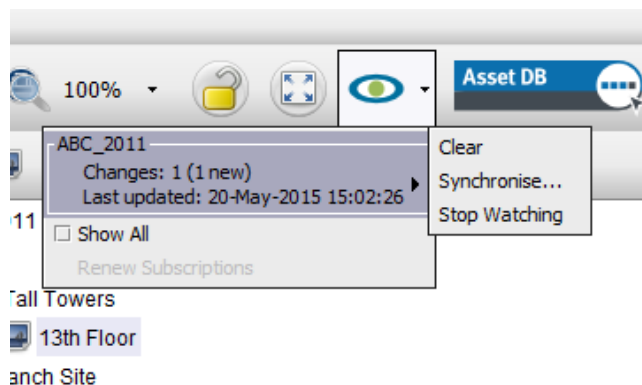



Figure 89. Project notifications

Project subscription preferences can be updated by going to Options > General Options and selecting the Project Notifications tab.

23 Deactivating your Asset DB Licence

If for any reason you need to transfer your Asset DB licence from your existing PC (i.e. you get a new laptop) it is possible to deactivate your licence ready to be used on another machine.

To do this, go to Help > Licensing > Deactivate. You will be asked if you are sure you want to deactivate and then you will get a pop-up containing your deactivation codes. Copy the text in the

pop-up by clicking the  button, paste it into an email and send it to your dedicated support team, explaining the type of licence you hold. You will then be sent instructions for how to reactivate your licence on a different machine.

Note: it is advisable to make a back-up of your projects BEFORE you deactivate your licence by synchronising them with the Asset DB Cloud. If you have any TCO and Green Analyses associated with the projects, these should be exported by going to File > Export > Any Solutions should also be exported or synchronised.

This way everything will be available to import/synchronise back into Asset DB when you reactivate your licence on the new device.