Enterprise Insight™ 3.0

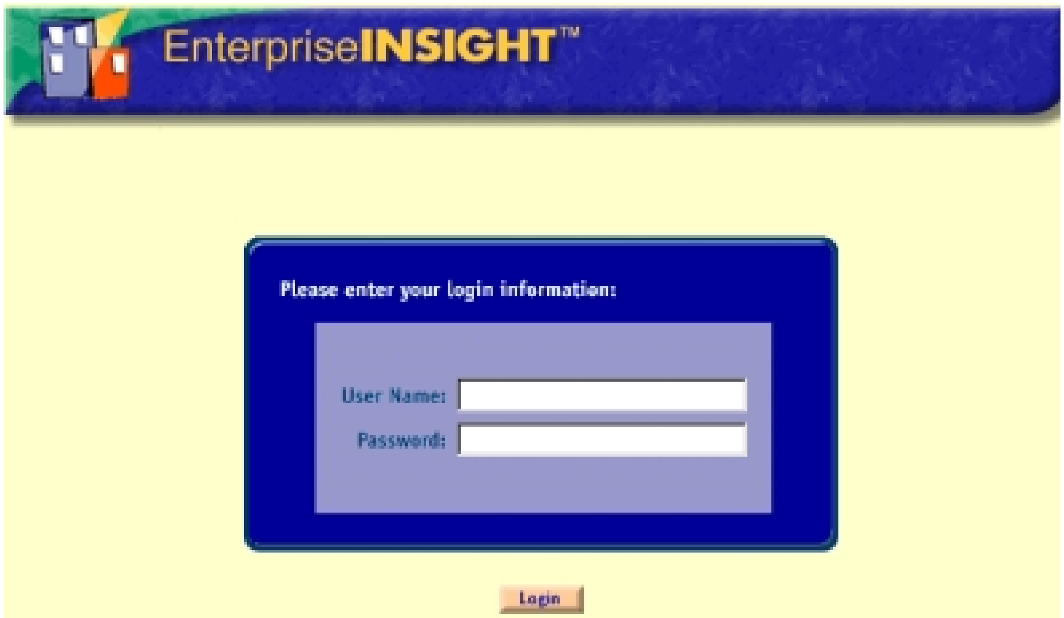
User's Guide

Table of Contents

Chapter 1. Overview

General information

Enterprise Insight gives you the ability to create and edit all the documents necessary for asset and contract management. Enterprise Insight is accessed through your web browser. Your administrator will provide you with a user name and password.



To log in, type your user name and password where indicated and click **Login**.

Once logged in, Enterprise Insight presents your personal welcome page, **Insight Today**. For more information, see *Insight Today overview* on page 13.

Choose from the links on your Insight Today page, or click one of the buttons on the navigation toolbar, to begin working in Enterprise Insight.

The [navigation toolbar]() will always appear at the top so you may choose any function at any time. At the bottom left of the navigation toolbar, an orange tab will tell you what page you are currently on.

Help is always just one click away. If you need a definition of a term used, click the ? button beside it. If you need a description or details of how to perform a task, click Help for the online help contents. The help pages in Enterprise Insight are detailed and extensive and most have detailed task instructions. Some pages, such as record detail windows, also offer links to help of related functions.

The basics and terminology

Here's an overview of the basic functions of Enterprise Insight.

Searching for records

Search To search for a variety of objects or areas in Enterprise Insight, click **Search** on the navigation toolbar.

You can also use the Search page to find a specific record and then go directly to the Details page of a record to edit it.

Wizard functions

Most functions in Enterprise Insight offer guided instructions. **Requestor**, **Buyer, Receiver,** and **Lease Manager** each offer step-by-step instructions for creating documents. When you click on the link “Start a New…”, a series of steps guides you through the process of creating your document or record. It’s simple for a casual user to create or review a record in a few easy steps with little or no training required.

Example of a wizard

> When you click **Start a New Request** in the Requestor window, you are first asked to describe what you need. When you click Next, you are offered the options of selecting items from various areas in the database such as the product catalog or by simply entering a description of what you want such as “I need a new laptop for presentations to clients.”

Creating and editing records

Wizards also help with creating and editing records. You can search for a specific record and edit it in the Record Detail window. You can also use the step-by-step instructions offered in Requestor, Buyer, Receiver or Lease Manager to edit or create records.

Entering data

You can use the mouse and keyboard to enter data, when you are creating or editing, or entering search criteria. Use the following to define search criteria:

Click in a text entry field and then type in text, numerical data, or a date. Text entry fields are white.

Click in a check box to enter or remove a check.

Click **lookup** to display a list of valid entries in a lookup window, to enter a "From" and "To" date, a duration, or to select a date from the calendar in a date entry window.

Text entry fields

Text entry fields display as three-dimensional boxes on screen, and you can use your mouse to click in them and then begin typing.

Lookup fields are fields in which you can modify the information by clicking **lookup** located to the right of the field. However, you cannot type data directly into the field.

Display fields are fields that Enterprise Insight fills in with information previously entered in another editor or document, or calculates based on data you entered. You cannot edit the information in a display field. There is no box or lookup button next to these fields.

> **TIP:** If you do not see the expected information displayed onscreen after you fill in associated fields, try clicking **Save** to update the record. For example, if the group contact isn't entered after you select the group, click **Save** to update the information on screen.

Field labels

The labels on required fields display differently than those on optional fields. If you like, you can click **Required** at the top of the Record Detail window to see and enter all the required fields on one page.

Red labels — Required fields. Fields which must be completed before you can save documents or items.

Black labels — Optional fields. You can save this document or item without entering information in optional fields.

Duration fields

Durations define the length of time associated with an activity or transaction in Enterprise Insight, such as the length of a lease agreement. Durations are two-part fields consisting of a number and the duration unit; for example, day, week, month, quarter or year. Enterprise Insight provides a special window for entering durations, which opens when you click **lookup** . You can enter the length of time by entering a number and selecting the duration unit from the list.

The default duration unit for your organization is specified in the Enterprise Insight Client Preferences Editor, managed by your Administrator. However, the duration unit can be changed for any field by selecting a different unit from the list.

Entering data in fields

To fill in fields, you can:

- Click in a field and then type in text, numerical data, or a date.
- Click in a check box to select (or de-select) the option.
- Click lookup to display a list of valid entries in a lookup window, or to enter a date in a date entry window.
- Select an option from a drop-down menu next to a field.

Specifying search criteria

To specify search criteria, you can:

- Click in a field and then type in text, numerical data, or a date. You may type in the beginning of a search string, instead of the entire search string, to broaden the search criteria.
- Click in a check box to enter a check.
- Click lookup to display a list of valid entries. Click Search, then select a valid entry and click OK.
- Click lookup to enter a date range. Type valid To and From dates and click OK.
- Select an option from a drop-down menu next to a field.

Terms

The following terminology is used throughout this user's guide as well as in online help.

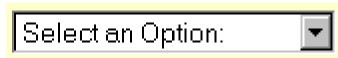
- **Definition Button**

  Beside most terms throughout Enterprise Insight, there will be a definition link.

  Click the button to see what the field's title means or stands for in Enterprise Insight. A definition window will pop up with a brief description. If you need further information, click **Help** on the navigation toolbar.

- Drop-down menus

  The arrow to the right of a field that, when clicked on, shows a menu of values to choose from.



- **Look-up**

  The white button with three green arrows to the right of a field that, when clicked on, brings up a search window, giving you the ability to search for and select a value.

- **Open**

  The Open button appears in the Open column for a record item. When you click on this button, the record details window will open up for this record, giving you the ability to view or edit the fields on the record.

- Required Field

  The fields on a record that have field titles in red.

- Search Criteria Fields

  The fields used to narrow a search. In the example below, when the Search button is clicked, only products that you changed and are hardware will be retrieved.

Chapter 2. Navigation

Enterprise Insight's navigation toolbar appears at the top of every page for easy access to all areas wherever you are in the program. Since it is a web-based application, it is very similar to pages seen in your browser from the Internet.

The following chapters will go over each area of the toolbar in detail.

The navigation toolbar is split into three levels: the first is the main banner, seen on every page; if you click on it, you'll be taken to the **About Enterprise Insight** page. The second has general links to areas of Enterprise Insight, and the third to specific functions of Enterprise Insight.

On the **About Insight** page, you'll see:

- Login of the user using Enterprise Insight at the current computer
- Enterprise Insight version number
- Number of users currently logged into Enterprise Insight
- Maximum number of users permitted under your Enterprise Insight license agreement
- Number of assets in use, or in inventory, which is used to calculate the maximum number of assets. Assets that have been disposed of, which remain in the database, are not counted. Child assets, which have been configured to other assets, are also not counted.
- Maximum number of assets permitted under your Enterprise Insight license agreement

Navigation buttons

Just below the logo, a navigation bar with links for Search, Settings, Help, Insight Today, and Logout appears.

When you login, you are automatically directed to your welcome page, Insight Today. However, if you want to return to this page after being in another area of the program, click **Insight Today**.

Click **Search** to find a record using the information you know about it.

There are several options under **Settings.** You can change your user preferences, the global search settings, global system settings and others. This is described in more detail in Chapter 5. Settings and Preferences on page 20.

If you are through using Enterprise Insight, click **Logout** to be sure your user ID is logged out. Just closing your browser may not log out your user ID.

Here's where you will find extensive documentation on all areas of the application. Clicking **Help** brings up a table of contents for you to choose what information you need.

Function buttons

At the bottom of the navigational bars are the function buttons, those that take you to where the action is in Enterprise Insight.

Asset Expert Click **Asset Expert** to create assets and to create contracts such as maintenance agreements, software licenses and procurement documents. You can also commence contracts created in Asset Expert. For more information, go to Asset Expert Overview on page 27.

> The following functions, **Requestor, Buyer, Receiver**, and **Lease Manager** are purchased as a separate package called **Purchasing Manager**. Your company may or may not have this functionality in Enterprise Insight

Requestor Click **Requestor** to request equipment and to put requests into your company's procurement process. For more information, go to Requestor Overview on page 35

Buyer Click **Buyer** to order equipment, create volume purchase agreements and, if a Reviewer, review and approve orders. For more information, go to Buyer Overview on page 42

Receiver Click **Receiver** to create receipts for equipment received or unordered items. For more information go to Receiver Overview on page 55.

> **Lease Manager** is available for purchase as an addition to Enterprise Insight. Your company may or may not have this functionality.

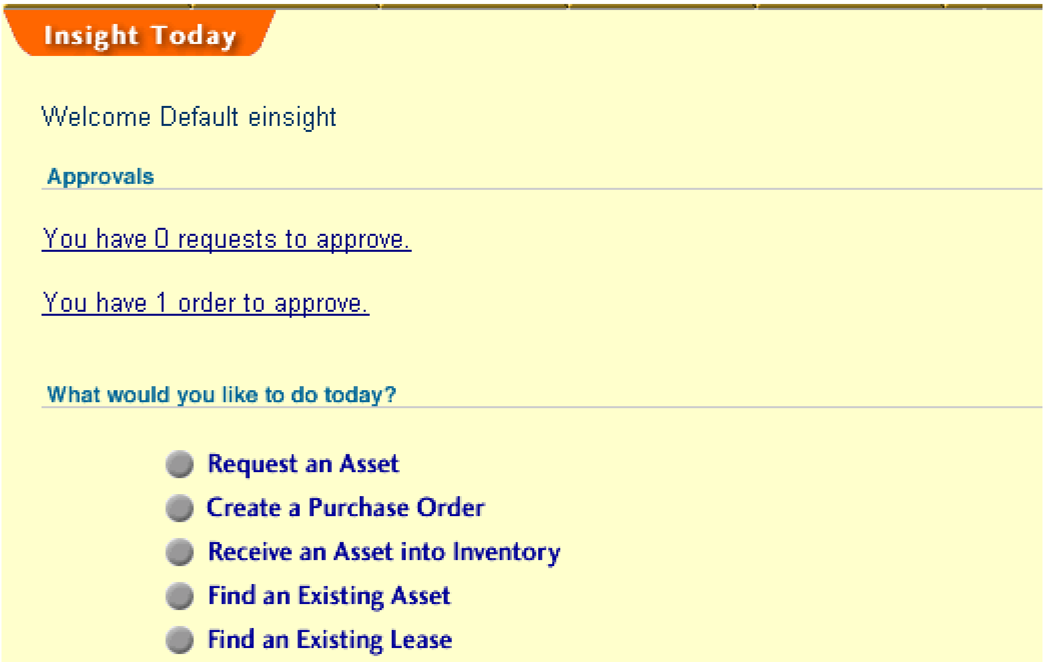
Lease Manager Click **Lease Manager** to view, enter, and modify the terms and conditions of leases, master leases and schedules. For more information, go to Lease Manager on page 59

Report Agent Click **Report Agent** to create customized reports that colleagues can view on the Enterprise Insight reports web site. For more information, go to Report Agent Overview on page 67.

Calendar Click **Calendar** to view important dates for leases, volume purchase agreements, maintenance agreements and software license agreements. For more information, go to Using the Calendar on page 84.

Chapter 3. Insight Today

When you log in, the **Insight Today** page appears with links to commonly-used functions. If messages waiting for you from a Messenger update, orders or requests to approve, prompts will appear on this page as well.



This is your personal welcome page, and greets you by your user name. To get started, choose a link from the Insight Today page or click your choice in the navigation toolbar.

You can return to Insight Today at any point by clicking its link in the navigation toolbar.

Insight Today overview

Approvals

If any orders or requests are waiting for your approval, you'll see them listed under the **Approvals** heading. Click on the link to open the documents waiting for your review.

What would you like to do today?

The links listed at the bottom of the Insight Today page are those most frequently accessed. You can also access all the functionality of Enterprise Insight from the toolbar, no matter where you are on the web site.

Request an Asset

Opens Requestor and begins a new request for equipment. Requestor includes a wizard that helps you create and submit a request.

Create a Purchase Order

Opens Buyer and begins a new order for equipment. Buyer includes a wizard that helps you create and send a purchase order.

Receive an Asset into Inventory

Opens Receiver to begin a receipt for equipment shipped to you. Receiver has a wizard to help record the arrival of items at your company and add those assets to inventory.

Find an Existing Asset

Opens the Search screen for assets so you can quickly locate the records for one or more assets. When you find an asset, you can open the record and edit it.

Find an Existing Lease

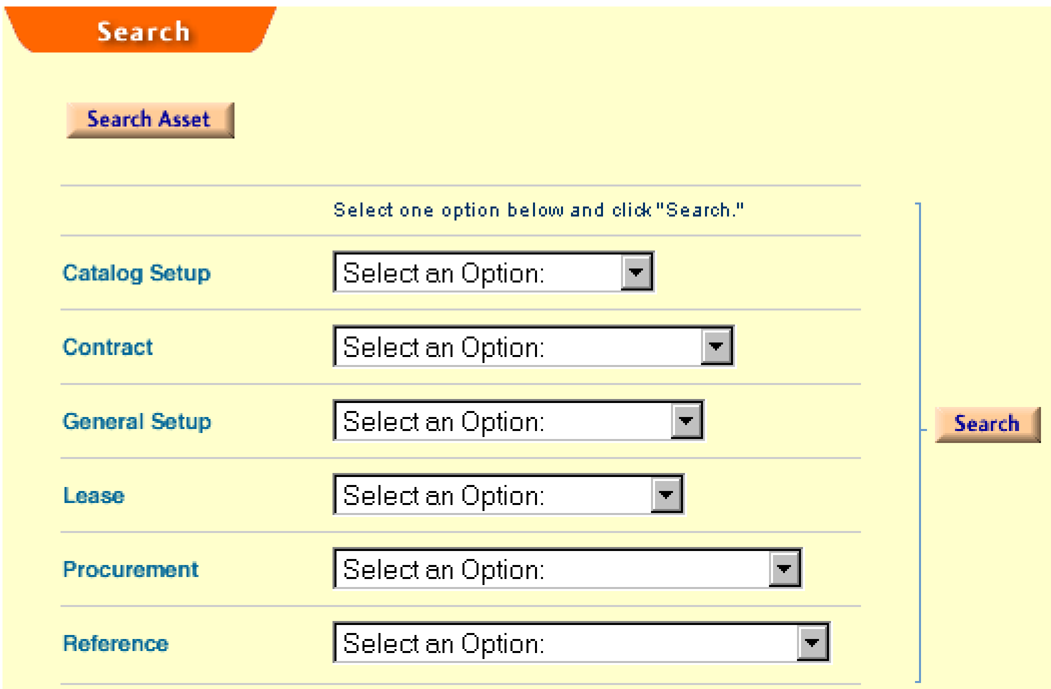
Opens the Search screen for leases so you can quickly locate the records for one or more leases. When you find a lease, you can open the document record and edit it.

Chapter 4. Searching

Searching overview

Enterprise Insight provides search capability for individual assets or groups of assets, documents, and setup records. For example, you might want to find a product to determine what order it was on. Or you might search for an asset to locate the maintenance agreement that covers it, or search for the maintenance agreement to see the list of assets that it covers.

Instructions for *Searching for assets*, *Searching for document or setup records*, *Browsing through data*, and information on using *Search and result settings* are included in this chapter.



Searching for assets

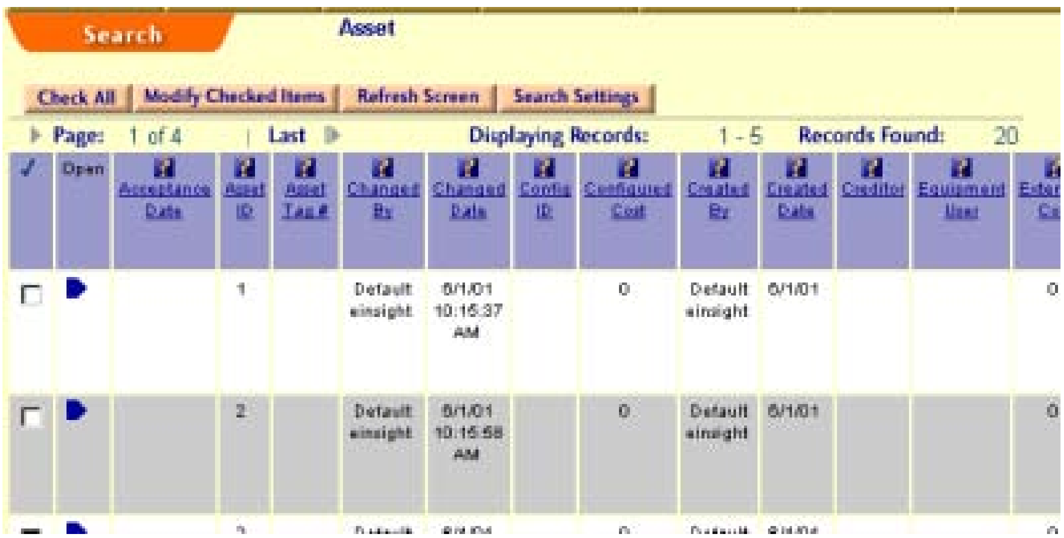
Enterprise Insight lets you search for assets using one or more criteria fields. When searching, all fields are optional and independent. For example, Enterprise Insight will not prevent you from entering a product category that is invalid for the product you enter.

To search for assets in the database:

1. Click **Search** on the navigation toolbar.
2. Click Search Asset. 

3. The Search Criteria Fields page appears. Fill in the fields to search on.
   - If you want to display all items of the selected type, leave all fields blank. For information on filling in search criteria fields, see *Specifying search criteria* on page 9.

4. To search by the criteria you entered, click **Search**. Enterprise Insight lists the asset records that match the search criteria in the search results.
5. Locate the asset you want and click **Open** to display the details. For an example of a search results page, see below.



Searching for document or setup records

Enterprise Insight lets you search for contract, lease and procurement documents, as well as product, general and reference setup records. You can search through one type of record at a time, using one or more criteria fields. When searching, all fields are optional and independent. For example, Enterprise Insight will not prevent you from entering a product category that is invalid for the price you enter.

To search for document or setup records in the database:

1. Click **Search** on the navigation toolbar.
2. Select the type of record to find from the available lists. In this example, beside Category, select **Assembly**.
3. Click **Search** on the right.
4. Fill in the fields to search on. For information on filling in criteria, see *Specifying search criteria* on page 9.

5. To search by the criteria you entered, click **Search**. In the search results, Enterprise Insight lists the records that match all the criteria entered.

6. Locate the document you want and click **Open** to display the details.

Browsing through data

The Search Results page lets you browse through all records of one type, or all records of one type that match criteria you enter. You can browse through assets that have been entered in inventory, products in the catalog, contracts and agreements, lease documents, procurement documents, and setup records. After you select a record type and search for it, you can scroll through pages of data to review the records, look at the details of specific records, and print the list of records. You can also customize the data that you see when browsing.

To browse through all records of one type:

1. Click **Search** on the navigation toolbar.
2. Select the type of record that you want to find from the available lists.
3. Click **Search** on the right.
4. Without entering criteria, click **Search**. The first page of records for your selection displays.
5. If more than one page of records is found, **Page X of X** will appear with scroll buttons. Use this to scroll through the page(s) of records to find the one(s) you are looking for. Or, if you want to go to the end of the records, click the scroll arrow next to **Last** to go to the last page of results.

Search and result settings

You can customize your own local search and result settings. You can also customize the global search settings, which applies general settings changes to all records. For information on global search settings, see *Settings* overview on page 20. **Search Settings** appears in several different areas of the program such as Search the Catalog when you are creating a new request.

To customize the search settings for a particular asset record:

1. Click **Search** on the navigation toolbar.
2. Click **Search Asset** or select another record you would like to search for, then click **Search**.
3. Click **Search Settings** at the top of the Search Criteria Fields window. A window appears, listing all fields used to search for this particular type of record. All fields are checked as default. Click to de-select those you don't want Enterprise Insight to use in a search.
4. Click **Save** when done choosing attributes to search on. This will automatically refresh the Search Criteria page.
5. Each Search Settings page displays three columns**: Field Names, Appear on Search Criteria Page, Appear on Search Results Page**. Click to select or de-select those checkboxes to define fields to filter the search (criteria), and checkboxes to define fields you want to see in the results of your search.

Search Settings for: Asset Save Cancel

Field Name	Appear on Search Criteria Page	Appear on Search Results Page
Acceptance Date	☑	☑
Asset ID	☑	☑
Asset Tag #	☑	☑
Changed By	☑	☑
Changed Date	☑	☑
Config ID	☑	☑
Configured Cost	☑	☑
Created By	☑	☑
Created Date	☑	☑
Creditor	☑	☑
Equipment User	☑	☑
Extended Cost	☑	☑
Fair Market Value	☑	☑
Fair Market Value Date	☑	☑
Fixed Asset #	☑	☑
Grade	☑	☑

To clear or set ALL checkboxes in a column, click twice on the **Reset** link at the bottom of the page. You may also click each checkbox to check or clear it.

Warranty Expiration Date	☑	☑
Warranty Start Date	☑	☑
	Reset	Reset

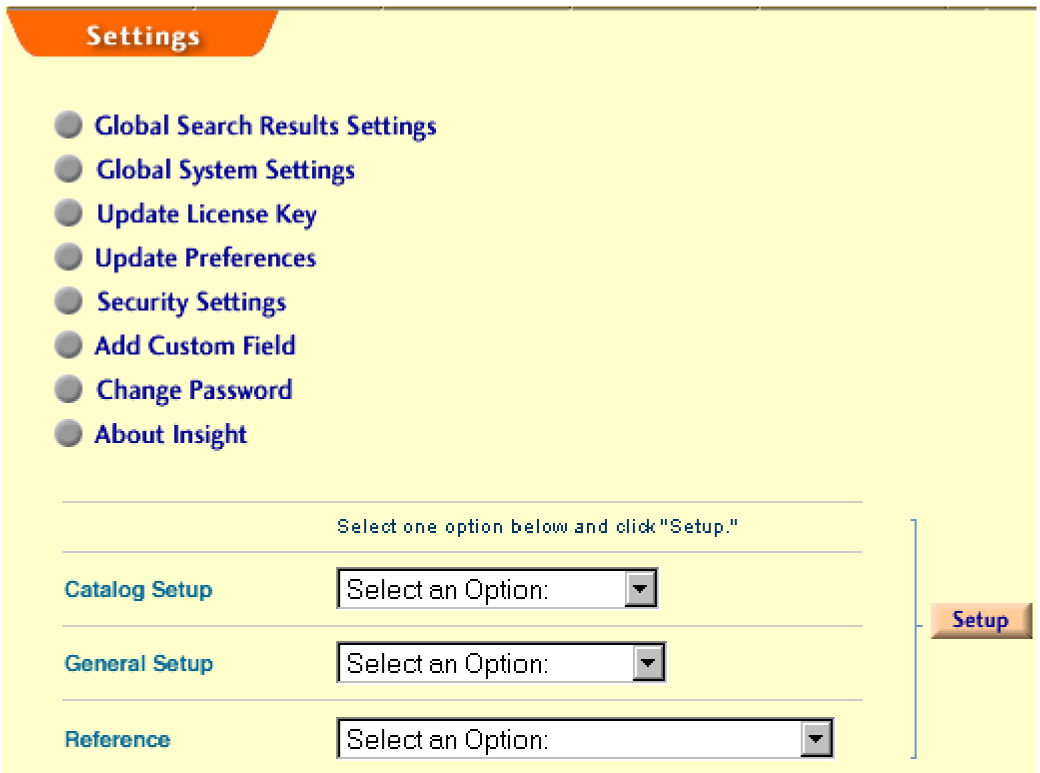
Chapter 5. Settings

Settings overview

The Settings page allows you to specify global search criteria settings, change your password, or go to About Insight.

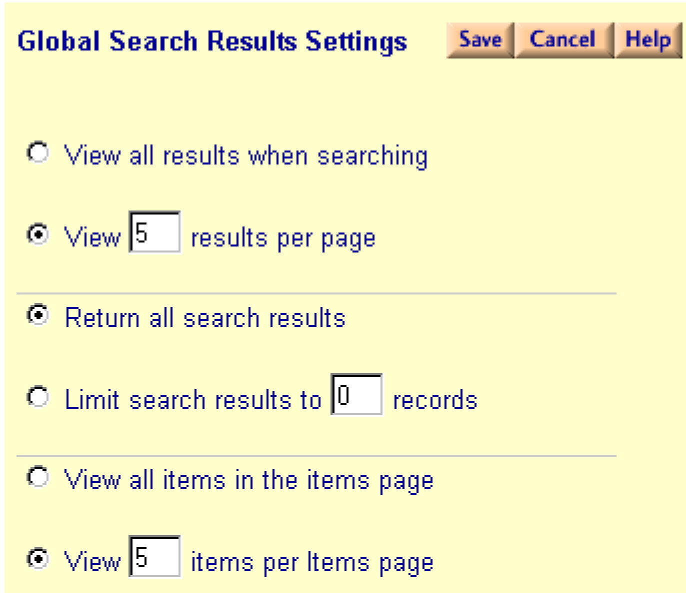
An administrator can create a custom field, update preferences, update the global system settings, check or update the license key, update company preferences and create security settings. If you are logged in as a user, you will not see these options.

Administrators, please refer to the ***Enterprise Insight Administrator's and Installation Guide***.



Global search results settings

Enterprise Insight displays search results based on search criteria and column selection. You can specify whether the records will appear on one or multiple pages, how many records to retrieve from the database, and how many items appear in the Items section of the Record Detail window. By default, Enterprise Insight finds all records matching the criteria, then displays five records per page, and five items per Record Details page.



To specify the number of records to display per page as a result of a search, enter a number in the **View X results per page** and click to select it. If you want to have all results returned when searching, click to check **View all results when searching**.

To limit the number of search results, enter a number of records to return in the **Limit search results to X records** and click to select it. If you want all search results returned, click to check **Return all search results**.

To limit the number of items in an Items page, enter a number in the **View X items per Items page** and click to select it. To view all items, click **View all items in the Items page**.

When you are done making your selections, click **Save**. These preference settings will be used when you are using the Search functions in Enterprise Insight.

Change password

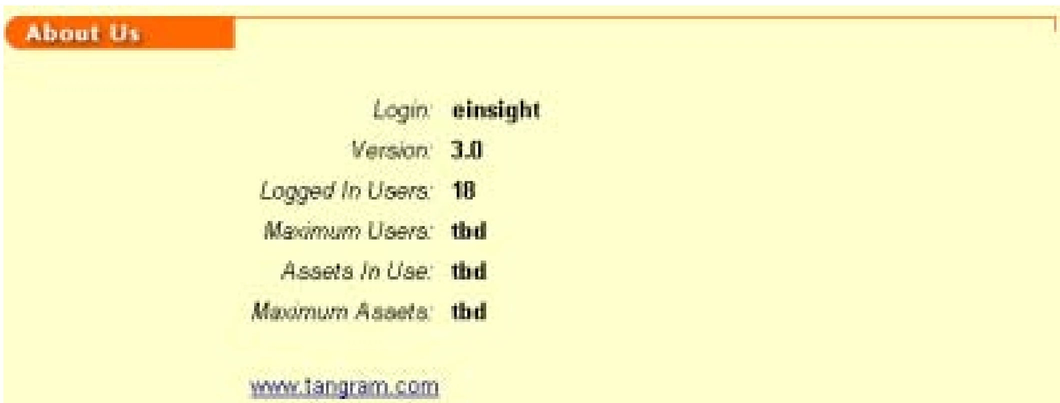
It is recommended, for security purposes, that you change passwords as often as your administrator suggests, if not more.

From the drop-down list, select your user name. Type a new password, then retype the new password to confirm it. Click **OK**.

Be sure to remember your new password; you will need to use it the next time you log in.

About Insight information

Click this link to view system information such as in the example below. You can also access this information by clicking on the main Enterprise Insight banner after logging in.



Chapter 6. Adding and Editing Items

You can add, edit or delete items in the Record Detail window for the item. Examples of items include:

- Products requested on requests and orders.
- Products that are part of a standard configuration.
- Assets on lease or sale documents.
- Child assets and cost center allocations for assets.

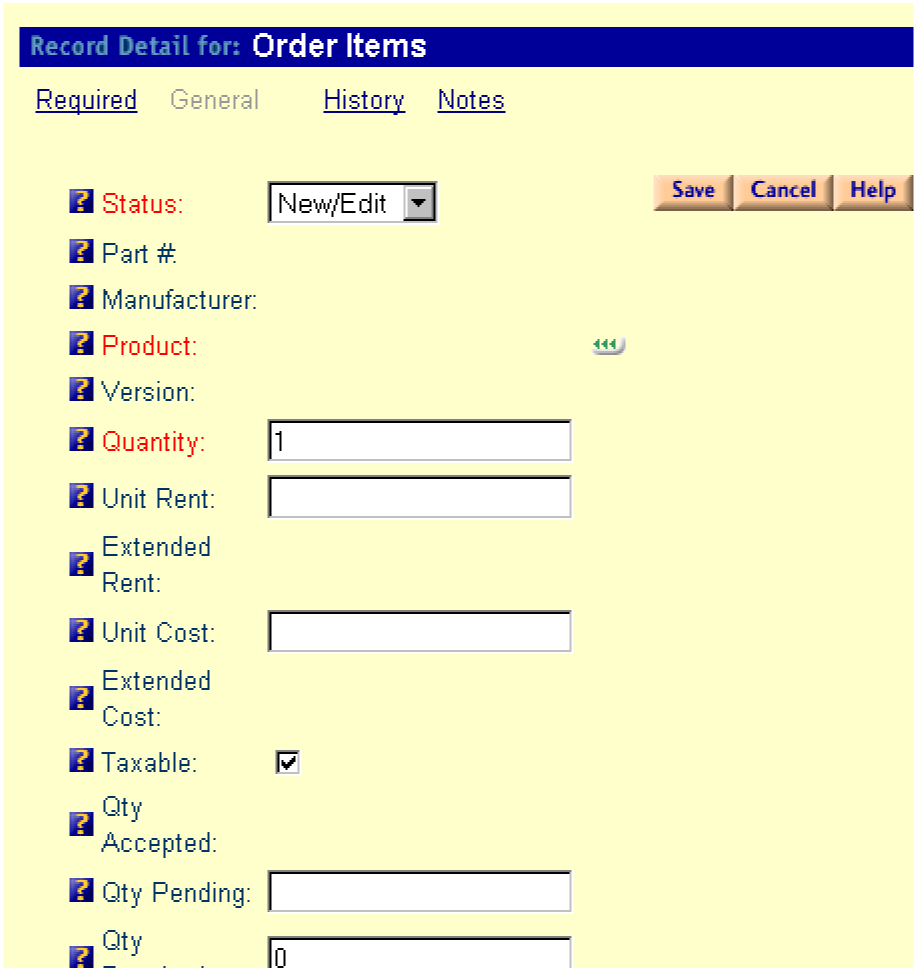
If you want to modify or add to item information, you can search for it, and then open it in an editing window. You can modify all items on documents that have a status of Edit. Enterprise Insight administrators can edit items on documents in any status. When creating or editing items, you will not see the data for fields that Enterprise Insight fills in automatically. You can view all fields after you click **Save** and the information onscreen is updated.

Adding items

To add items:

1. Search for and open the Record Detail window for the asset, document or setup record if it is not open. In the example below, the search was for an order. Once you find the order, click **Open** to open the Record Detail window.
   For help on searching, see *Searching* overview on page 15.
2. Click Items at the top of the page.

3. Click **New Item** to add an item and open the Record Detail page for the item you are adding.



4. Fill in the required fields and any optional fields that you can.
5. To save the item information you entered, click **Save**. Wait for the Save complete message.
6. Repeat steps 3 through 5 to add additional items.
7. To save the revised document, click **Save** in the Edit window.
8. You can also add items while you are creating a document, after you click **Save**.

Editing items

To edit an item:

1. Search for and open the Record Detail window for the item if it is not open as done in Adding Items, steps 1-2, above. Make your changes in the item's Record Detail window. See *Adding items* on page 23.
2. To save the item information you entered, click **Save**.

Deleting items

To delete items:

1. Search for and open the Record Detail window for the item if it is not open as done in Adding items, steps 1-2, above.
2. Click **Items** at the top of the page.
3. Click to select the box next to the items you want to delete. If you want to delete all the items in the order, click **Check All**.
4. Click **Delete Checked Items.**
5. Click **Yes** when asked to confirm.
6. To save the revised document, click **Save**.

Chapter 7. Editing Documents

To modify or add to a document's information, first search for it, then open it in an editing window. You can modify all documents with Edit status.

When creating or editing documents, data for fields entered automatically won't be displayed. You can view the data in all fields after you click **Save** and the information onscreen is updated.

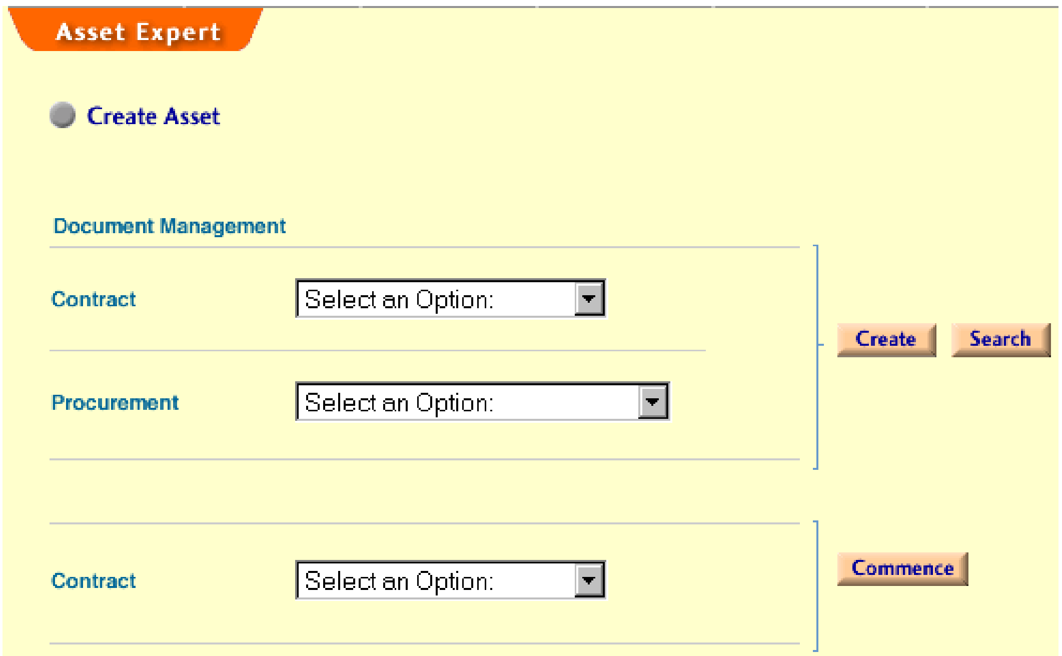
To edit a document:

1. Click **Search** on the navigation toolbar.
2. Select the type of document to edit. Documents are listed in the **Contract, Lease** and **Procurement sections**.
3. Click **Search** on the right. For information on defining search criteria, see *Specifying search criteria* on page 9.
4. Click **Search**. On the search results page, Enterprise Insight lists the documents matching the criteria. For an example of a search results page, see *Specifying search criteria* on page 9.
5. When you find the document to edit, click **Open** to display the details.
6. Make any additions or modifications. Use the links at the top (Custom, General, etc.) to display additional fields to modify or add information.
7. For information on adding or deleting items, see *Adding items* on page 23 and *Deleting items* on page 24
8. To save the information you entered, click **Save**.

Chapter 8. Asset Expert

Asset Expert overview

An asset is a product that is either owned or leased by your company. You can add items in inventory with **Create Asset**. To add assets to inventory, first search in the product catalog to select the manufacturer, product, version and part number. If the items are not in Enterprise Insight's product catalog, they cannot be added to inventory. Ask your administrator for assistance with adding new products to the catalog.



After adding assets, they can be connected to Enterprise Insight documents (such as maintenance contracts and software licenses. If you are a Purchasing Manager module user, assets are created in the repository through the Receiver functions. If you are a Lease Manager module user, assets in the repository may also be connected to lease agreements. All assets must be entered into Enterprise Insight's repository before they can be attached to a contract such as a Lease or Sale contract.

From the Asset Expert home page, you can create or search contracts and, if you have Purchasing Manager, procurement documents. You can also commence contracts.

Creating assets

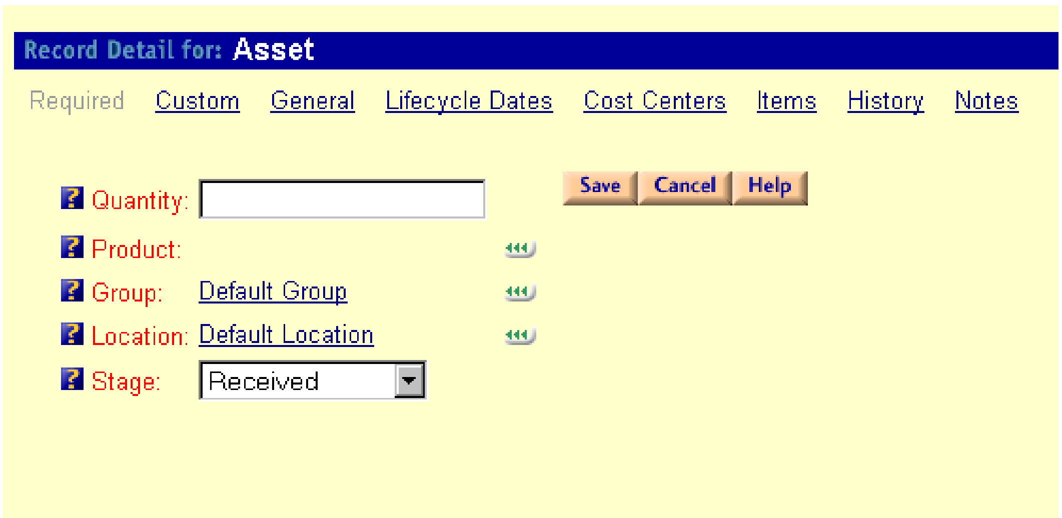
New assets received through *Receiver* Overview will automatically be added to the inventory. Assets already owned or leased by your organization must be added manually or electronically using **Importer.** (Only users with permission to use Importer or administrators can use this function. It is detailed in the ***Enterprise Insight Administrator's and Installation Guide.***) When you create, Enterprise Insight assigns a unique Asset ID to help find and manage them.

When creating or editing assets, data will not appear in the fields Enterprise Insight fills in automatically. You can view all fields after you click **Save** and the information is updated.

NOTE: Assets **must** be products selected from the catalog; if items are not in the catalog, they cannot be added to inventory.

To create a new asset:

1. Click **Asset Expert** in the navigation toolbar.
2. Click **Create Asset** on the Asset Expert page.
3. Fill in the required fields and any optional fields that you can. You can use the links at the top (Custom, General, etc.) to display additional fields. For information on filling in record detail fields, see *Entering data in fields* on page 9.



4. If the new asset is a child asset configured to another asset, enter its Parent Asset in the **General** section.
5. To save the information you entered for the new asset, click **Save**.
6. To enter cost center information, you must save the asset record.
7. Click **Cost Center** and enter in the cost center information.
8. To save the cost center information you entered for the new asset, click **Save**.

If the new asset will include additional assets configured to it (child assets), open the Record Detail window for each child asset and enter the new asset as the Parent Asset on the General section. After entering a parent asset, you can view the links between parent and child assets in the Related Documents section of the Record Detail window. Child assets are displayed under Items in the parent's Record Detail window.

Editing assets

You can edit the assets stored in inventory in Enterprise Insight. If you want to modify or add to an asset's information, search for it, and then open it in an editing window. You can view all fields after you click **Save** and the information onscreen is updated. You can also modify more than one asset at a time by globally replacing certain fields.

When creating or editing assets, you will not see the data for fields that Enterprise Insight fills in automatically You can view all fields after you click **Save** and the information onscreen is updated.

To edit an asset:

1. Click **Search** in the toolbar.
2. Click **Search Asset**.
3. Enter values in the fields you want to search by to narrow your search in the search criteria form. If you want to display all assets, leave all fields blank. See *Entering data in fields* on page 9 for information on placing data in fields.
4. Click **Search**. In the search results, Enterprise Insight lists the records that match the criteria you entered.
5. When you find the asset you want to edit, click **Open** to display the details.
6. Make any additions or modifications to the asset details. You can use the links at the top (Custom, General, etc.) to display additional fields.
7. If the currently-edited asset is a child asset configured to another asset, enter its Parent Asset in the General section.
8. In the **Cost Center** and **Items** areas, you may do one of the following: Click **New Item** to add a cost center to the asset or click **Open** to display the Item details.

7. To save the information you entered, click **Save**.

Global edits to assets

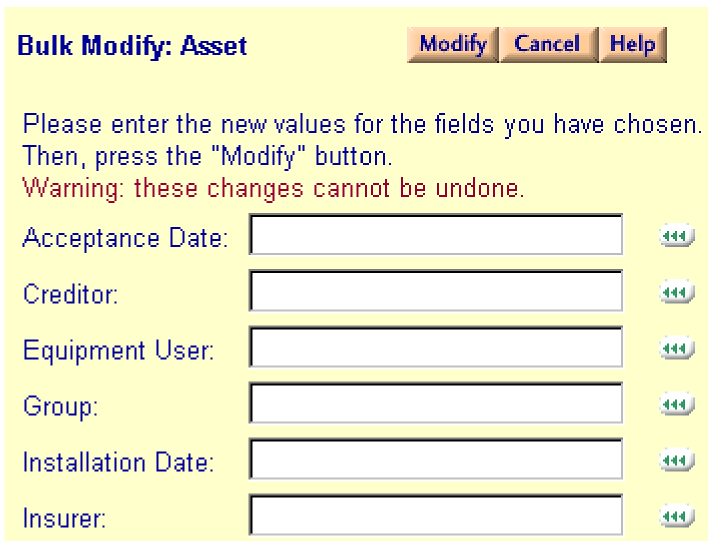
You can also modify a field on many assets at one time, by replacing fields “globally” or in “bulk”. For example, you can change the location on hundreds of assets.

To globally modify the contents of a field:

1. Click **Search** on the navigation toolbar.
2. Click **Search Asset**.
3. Select the criteria you want to search on and click **Search**.
4. Click to place a check by the assets you want to modify, or click **Check All** to modify all assets. . At least two items in the list must be checked to enable global modifications.
5. After you have selected all the items on the page that you want to modify, click **Modify Checked Items**. The Bulk Modify window displays.

6. Check the fields you want to modify, then click **Save**. In this example, the Acceptance Date will be changed for all the checked assets.

7. Enter the new data for the fields you selected by typing in the text box or clicking **lookup**.



8. Click **Modify**. A confirmation screen will appear that your changes have been made. Click **Close** to return to Enterprise Insight.

Creating contracts

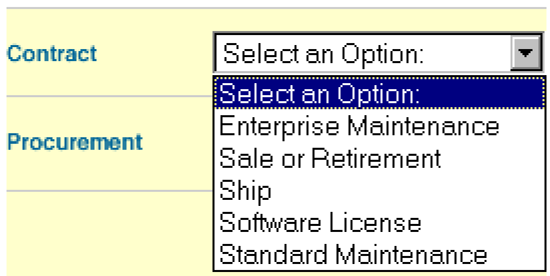
Enterprise Insight provides the ability to create, commence and edit contracts and agreements necessary for asset and contract management. It assigns a unique Enterprise Insight ID to all documents to help you find and manage them. Some of these documents may never be printed; they are online forms you use and save. For example, when you create a software license agreement, it is usually to record the details of the license, not to create a contract that will be sent to a vendor or manufacturer.

When creating or editing documents, you will not see the data for fields that Enterprise Insight fills in automatically You can view all fields after you click **Save** and the information onscreen is updated.

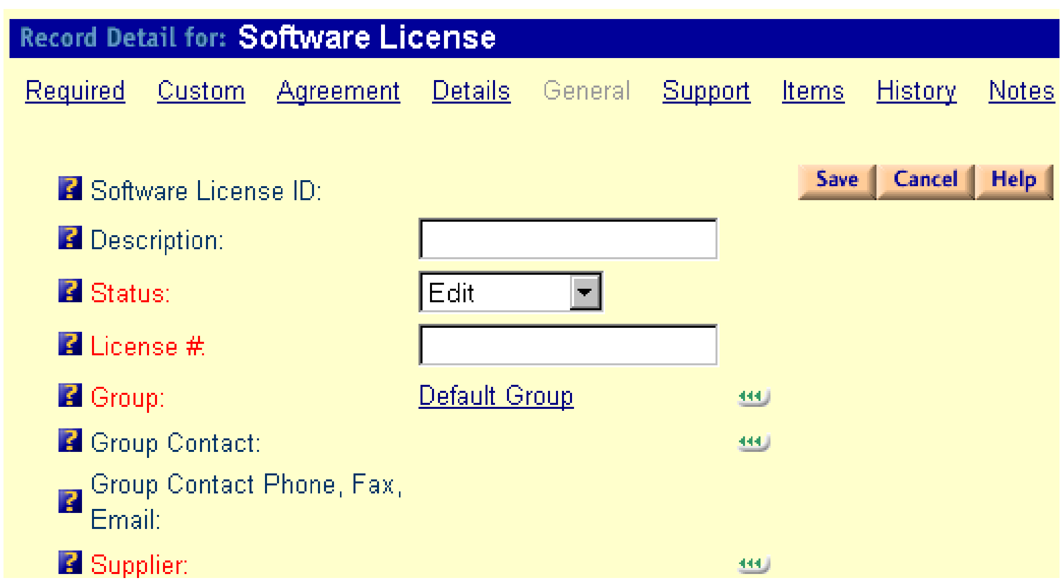
To create a new contract:

1. Click **Asset Expert** on the navigation toolbar.
2. Select the type of document to create from the drop-down menu next to **Contract**.

Descriptions of the selections, Enterprise maintenance agreements, *Sale or retirement of assets*, *Shipping assets*, *Software license agreement* and *Standard maintenance agreements*, follow the general instructions.



3. Click **Create** on the right.
4. The **Record Detail** for the option you selected appears. Fill in the required fields and any optional fields desired. Use the links at the top (Custom, General, etc.) to display or enter additional information. Also see *Entering data in fields* on page 9.



5. To save the information you entered in the new document, click **Save**. You must save the document before clicking **Items** to add item information.
6. If the document will include items, click **Items** at the top of the window, then click **New Item**.
7. Fill in the required fields and any optional fields that you can for the items.
8. To save the item information you entered, click **Save**.
9. The window closes and the new item is displayed on the Item grid
10. Click **General** to return to the General tab.

Enterprise maintenance agreements

Use Enterprise Maintenance to view, enter and modify the terms and conditions of enterprise maintenance agreements.

Two types of maintenance agreement can be entered in Enterprise Insight. An **Enterprise Maintenance Agreement** covers all assets in inventory that match the products you select for inclusion. *Standard maintenance agreements* cover specific assets in inventory selected for inclusion. An asset in inventory may be covered by more than one agreement at a time.

The Enterprise Maintenance Agreement can record the following types of details:

- Agreement number and schedule, as well as group and provider information.
- Specific products covered by the maintenance agreement, and product details.
- Maintenance agreement's coverage, commencement and relocation details.
- Maintenance agreement's payment details and billing information.
- Early termination, renewal and purchase option information.

Sale or retirement of assets

Use **Sale or Retirement** to view, enter and modify the terms and conditions of the sale or retirement of specific assets owned by your organization. Assets may be sold to a customer or retired by the group that owns them. When being sold, the customer must first be added as an external business in Enterprise Insight in order to be entered on a Sale or Retirement document, even if the customer is an employee. The Sale or Retirement document can record the following types of details:

- Sale number and retirement type, as well as group and customer information
- Specific assets to be sold or retired
- Asset details
- Sale's payment details and billing information
- Address, contact and shipping instructions for the customer

Shipping assets

Use **Ship** to view, enter, and modify details associated with the shipping of specific assets; for example, when terminating a lease, or generating a sale or retirement transaction.

The ship document can record the following types of details:

- General group and contact information.
- Address and contact information about the external business to which the items are being shipped.
- Assets covered by the ship transaction, and asset details, including the Unit Freight and Unit De-install Amounts.
- Delivery instructions including the carrier, tracking number and ship date

Software license agreement

Use **Software License Agreement** to view, enter and modify the terms and conditions of a software license agreement (SLA) with a software vendor for multiple installations of a software product. The agreement is made between a supplier and a group in your organization and has a specific commencement date and length. Once you create an SLA, you can track the installed assets that are covered under this agreement.

The software license agreement can record the following types of details:

- License number, group, supplier and contact information.

- Assets covered under the SLA, and the quantity allowed. You can enter an asset by selecting it from the inventory.
- Provisions that are included in the SLA; for example, whether the software will undergo acceptance testing, and whether upgrades are included.
- The type of support coverage and exclusions, specify how upgrades will be provided, and a support URL.

Standard maintenance agreements

Use **Standard Maintenance** to view, enter and modify the terms and conditions of standard maintenance agreements and schedules. There are two types of maintenance contracts that can be entered in Enterprise Insight. A **standard maintenance agreement** covers specific assets in inventory that are selected by you for inclusion. An **enterprise maintenance agreement** covers all assets in inventory that match the products you select for inclusion. An asset in inventory may be covered by more than one maintenance agreement at a time.

The standard maintenance agreement can record the following types of details:

- Agreement number and schedule, as well as group and provider information.
- Specific assets covered by the maintenance agreement, and details.
- Maintenance agreement’s coverage, commencement and relocation details.
- Maintenance agreement’s payment details and billing information.
- Early termination, renewal and purchase option information.

Commence a document

The following documents can be commenced from the Asset Expert home page:

- Enterprise Maintenance Agreement
- Software License Agreement
- Standard Maintenance Agreement

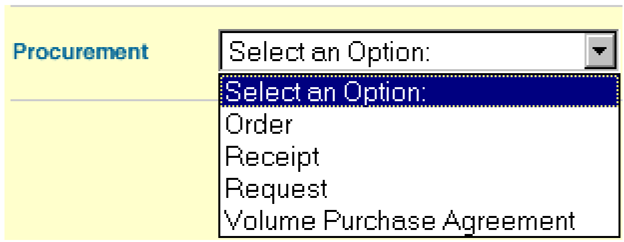
To commence a document:

1. From the Asset Expert home page, select the contract you want to commence. Choose **Software License, Enterprise Maintenance** or **Standard Maintenance** from the drop-down menu at the bottom of the page.
2. A list of the available contracts of the type you selected appears. Click to select the document you want to commence.
3. Click **Commence**.
4. Click **OK** when you see the "Are you sure?" prompt.

Chapter 9. Purchasing Manager

Purchasing Manager, purchased as an addition to Asset Expert, gives your company the ability to accomplish its full-cycle procurement process with a few clicks on your web browser. It is comprised of three components: ***Requestor, Buyer*** and ***Receiver****.*

These modules help you create, modify and view procurement documents such as requests for equipments, orders to be placed, receipts for equipment and volume purchase agreements. To use these procurement functions, you may either click their individual buttons or use tools from the Asset Expert home page.



Creating procurement documents

Generally, you will use the separate modules of Requestor, Buyer or Receiver to accomplish your procurement activities. However, some of these functions are available from the Asset Expert home page. For more detailed instructions on each module, see their respective chapters.

To create a new procurement document:

1. Click **Asset Expert** on the navigation toolbar.
2. Select the type of document that you want to create from the Procurement list.
3. Click **Create** on the right. The record detail for the option you choose appears.
4. Fill in at least the required fields and any optional fields you have information for. Use the links at the top (**Custom, General**, etc.) to display or enter additional information. See *Entering data in fields* on page 9 for information on filling in fields.
5. To save the information you entered in the new document, click **Save**. You must save the document before clicking **Items** to add item information. You will see a confirmation at the top of the window of **Save is complete**.
6. If the document will include items, click **Items** at the top of the window, then click **New Item**. See *Adding items* on page 23 for more information.
7. Fill in the required fields and any optional fields that you can for the items.
8. To save the item information you entered, click **Save**. The window closes and the new item is displayed on the items grid.
9. To return to Enterprise Insight, click the **General** tab, then click **Cancel** or close the window using the **X** button in the top right corner of the window.

Chapter 10. Requestor

Requestor overview

Requestor provides an easy way for you to request equipment that you need, putting your requests into Enterprise Insight and your company's procurement process. If you have the responsibility of approving requests before they are committed to orders, you can also do that in Requestor.

Enterprise Insight provides a structured procurement process that begins when you request equipment (Requestor), standardizes the ordering of it (Buyer), and adds it to inventory after you receive it (Receiver). Within an organization, several people are involved in the process.

Start a New Request guides you through the process of creating and submitting a request. Options are provided to help you select the equipment you need from your company's product catalog or a list of standard configurations. You can also enter a description of what you need; for example, you can type "I need a faster computer" but not specify a certain manufacturer's product, when creating a request.

Finish a Request You Started helps you find a request you started but were unable to complete, perhaps because you were interrupted or didn't have all the information on hand.

Check the Status of Your Request shows where your requests are in the procurement process; for example, whether your request has been approved and equipment has been ordered. You can check the status of requests at any time.

Approve Requests brings up all requests waiting on action from you. You can review requests, change the next reviewer to send the request to someone else to review, approve requests, or reject them. You can also print a request. Click **Done** to return to the Requestor home page.

Requesting products

Requestor offers three guided methods for adding products to your shopping cart.

You can request products by:

Searching the product catalog by entering criteria, which is usually the fastest method if you know what you need.

Choosing the standard configuration that is right for you and asking for it. Standard configurations are products that your company groups together in the catalog to standardize the procurement of equipment, and asset management, at your company. Different types of computers and setups are established for different types of employees, based on what they need to do the job.

Entering a description of what you need. For example, you could enter "I need a new battery for my laptop" and let someone in IT locate the part number. This is normally the easiest method unless you know exactly what you want.

Creating a request is like shopping for what you want; however, it doesn't guarantee you'll get what you need or want. You can check the status of your request later, to see if it has been ordered. Your request is processed and, if it is considered necessary and approved, an order will be created for the items you requested, or similar items that would meet your needs.

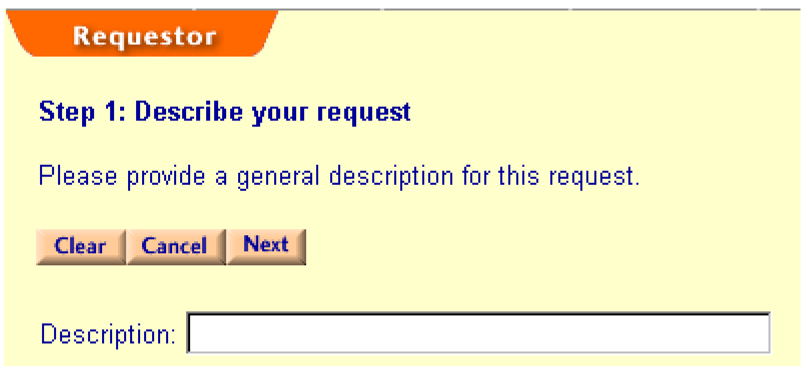
After selecting or describing products, you add them to your cart. You can view the contents of your cart to change product names, descriptions, and quantities, or remove items if you change your mind.

Creating a request

Creating a request using Enterprise Insight is easy; the step-by-step instructions guides you through the entire process if you select **Start a New Request** on the Requestor welcome page. Requestor will guide you through the rest of the process.

To create a request for items that you need:

1. Click **Requestor** in the toolbar.
2. Click **Start a New Request**. Step 1 appears.



3. Enter a brief description in the text box (such as “I need a laptop for presentations”) and click **Next.**
4. For **Step 2**, choose one of the following:
   - **Add a Product** opens the Product Search screen. Enter any details that you know or leave the fields blank and click Search. Select the product you want by placing a check in the box to the left and clicking Select.
   - **Select a Standard Configuration** opens the Standard Configuration Search screen. Standard configurations are products grouped together to standardize the procurement of equipment, and asset management. Different types of computers and setups are established for different types of employees, based on their job. Enter any part of the name or description that you know or leave the fields blank and click Search. Select the standard configuration you want by placing a check in the box to the left and clicking Select.
   - **Enter a Description**. Type a description of the item in the Description field; for example, “I need a laptop for running demos at trade shows.” Someone in the IT department will determine what you need and specify the product to order. Then click Next.
5. Once you’ve completed one of the steps above, you’ll be taken to your Shopping Cart. To continue selecting products, click **Add** on the Shopping Cart page and repeat step 4.

6. To remove an item, place a check in the box to the left and click **Delete**.

7. To edit an item, for example to change the quantity, click the arrow under **Edit** beside the item name.

8. Make your changes and click **Save**.

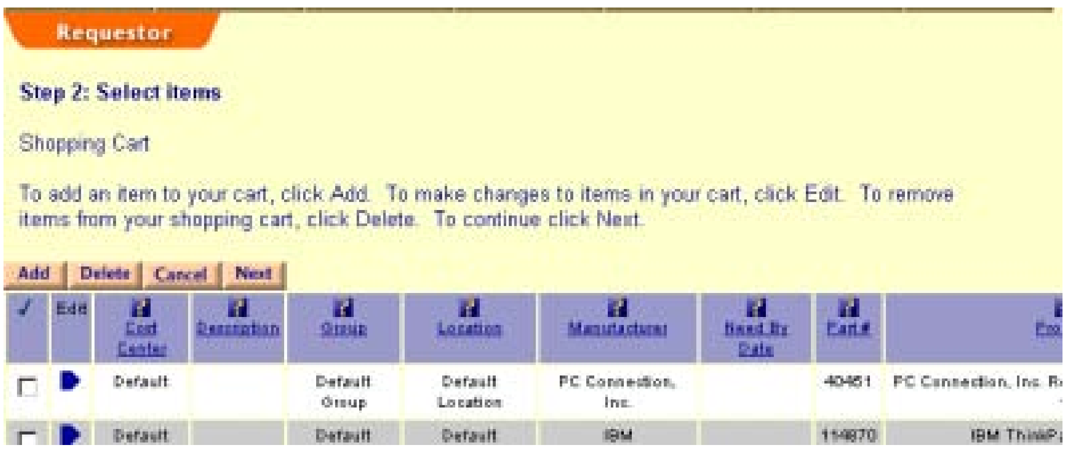
9. When you have completed your list of products, click **Next**.

10. On the **Select a Reviewer** page, enter criteria to find the person or leave the fields blank and click **Search**. You must select a reviewer for your request.

11. Choose the person to review your request by placing a check in the box to the left of the name and clicking **Select**.

12. On the final page, look over your request and item information. Click **Edit** to make document changes if necessary. For a printed copy of your request, click **Print**. To change, add or delete items, click **Shopping Cart.**

13. When you are satisfied with your request, click **Submit.** If you are not ready to submit it, click **Save** to save your request and submit it later.



Finishing a request

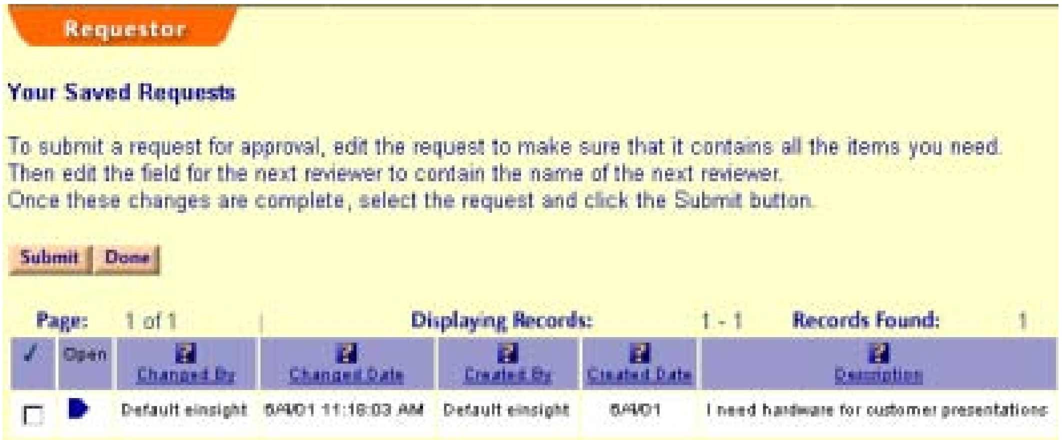
You can find, edit and finish a request that you previously started. Only requests not submitted can be edited.

To edit or finish a request:

1. Click Requestor on the toolbar; then click **Finish a Request You Started**.

2. **Your Saved Requests** page appears. Select the request you want to finish by clicking to check it.

3. At this point, if you are comfortable with the request, you can click **Submit** and your request will be routed to the next reviewer. If you want to make changes to the request, click **Open** to open the request's record detail window.



4. The record detail window for the request opens. Click **Items**, then click **New Item** to add an item to your request. Or click to check an item and then **Delete Checked Items** to remove items you don't need. See Adding items on page 23 for more information. Then click **Save** to save the item information.

5. You are returned to **Your Saved Requests** page. Click to check the request you just edited and click **Submit**.

Checking the status of requests

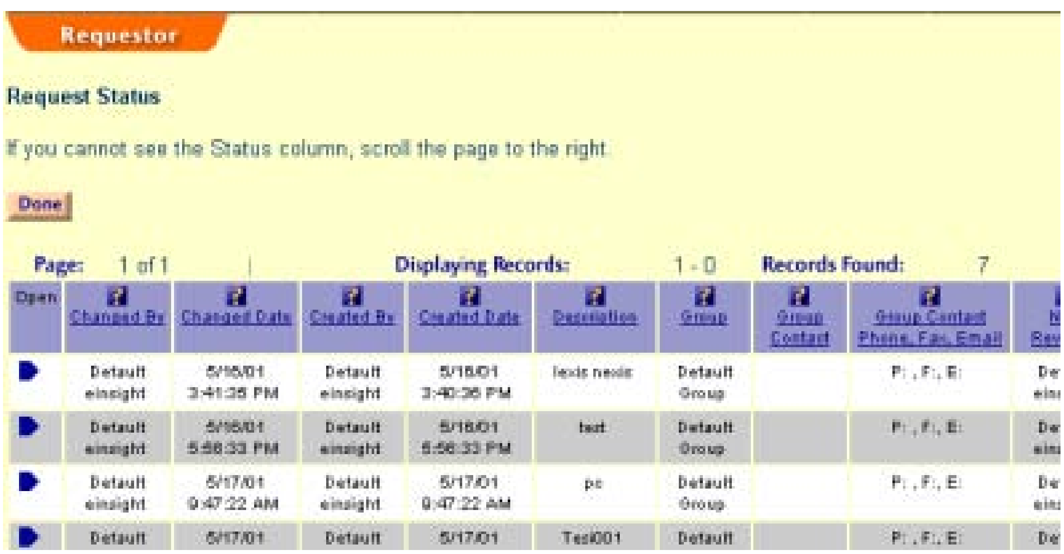
After you submit a request for items you need, you can check on how the request is progressing through your organization's process; for example, whether it has been approved or rejected, and if approved, whether it has been ordered for you.

To check on your submitted requests:

1. Click **Requestor** on the navigation toolbar.

2. Click **Check the Status of Your Requests**.

3. The **Request Status** page appears with a list of your submitted requests.



4. If you can't see the status of your request, use the scroll bar at the bottom of your browser to move the page to the right.

5. Click **Open** to the left to see the details of a particular request if you need more information.
6. Click **Cancel** when you are finished reviewing the status of your request(s).

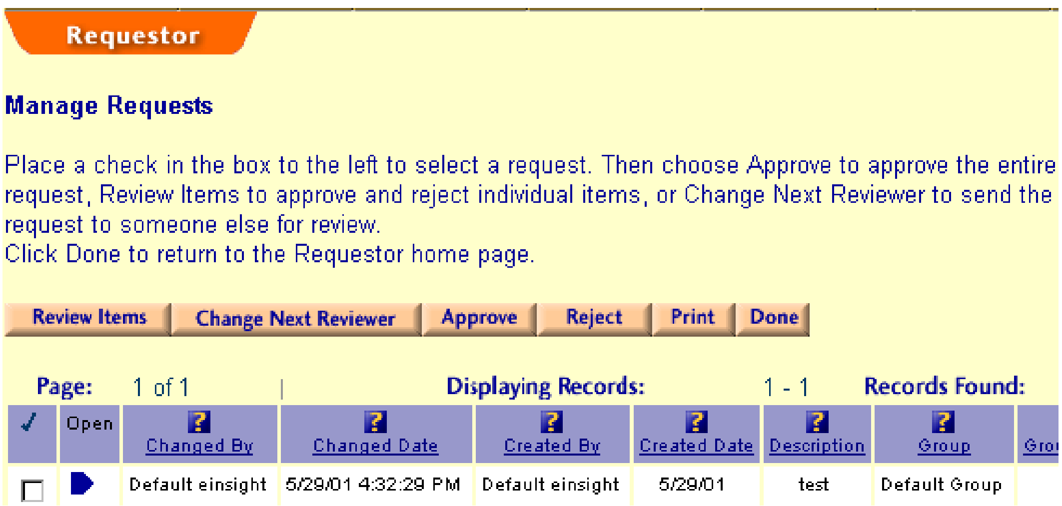
If you have questions about the status of your requests, contact your manager.

Reviewing requests

If you are designated as a **Reviewer** in Enterprise Insight, you can use Requestor to list the requests that are waiting for your approval. You can display request and product details, and then either approve or reject the requests. You can only use this link if you are a Enterprise Insight Reviewer.

To review requests pending your approval:

1. From the **Insight Today** page, click the link **You have X requests to approve**, then skip to step 4. From any other page, click **Requestor** on the toolbar and click **Approve Requests**.
2. The **Manage Requests** page appears with a list of all requests waiting for your action. From here, you can review, reject, approve, or send requests to another reviewer. You can also print individual requests.



3. You can click **Open** to the left to see the details of a particular request if you need more information.
4. You can approve a request, and all the items on it, by placing a check in the box to the left and clicking **Approve**. Or click **Review Items** to view the list of items on the request.
5. You can approve some or all of the items by placing a check in the box to the left and clicking **Approve**. Use **Check All** to quickly check and uncheck all the items on the page. Then close the Review Items window, and **Approve** on the Manage Requests page to change the status of the request to Approved.
6. You can reject some or all of the items by placing a check in the box to the left and clicking **Reject**. Then close the Review Items window, and click **Reject** on the Manage Requests page to change the status of the request to Rejected.

> If at least one item is approved on a request, you must click **Approve** on the Approve Requests page.

7. Repeat steps 5 through 7 for all requests waiting for your approval.

8. If you want someone else to review a request either instead of or in addition to you, place a check in the box to the left and click **Change Next Reviewer** to change the name of the person who should be entered in the **Next Reviewer** field.
9. On the **Select a Reviewer** page, enter any details that will help you find the person quickly or leave the fields blank and click **Search.**
10. Select the person who should review the request by placing a check in the box to the left and clicking **Select**.
11. When you are finished reviewing requests, click **End Review**.

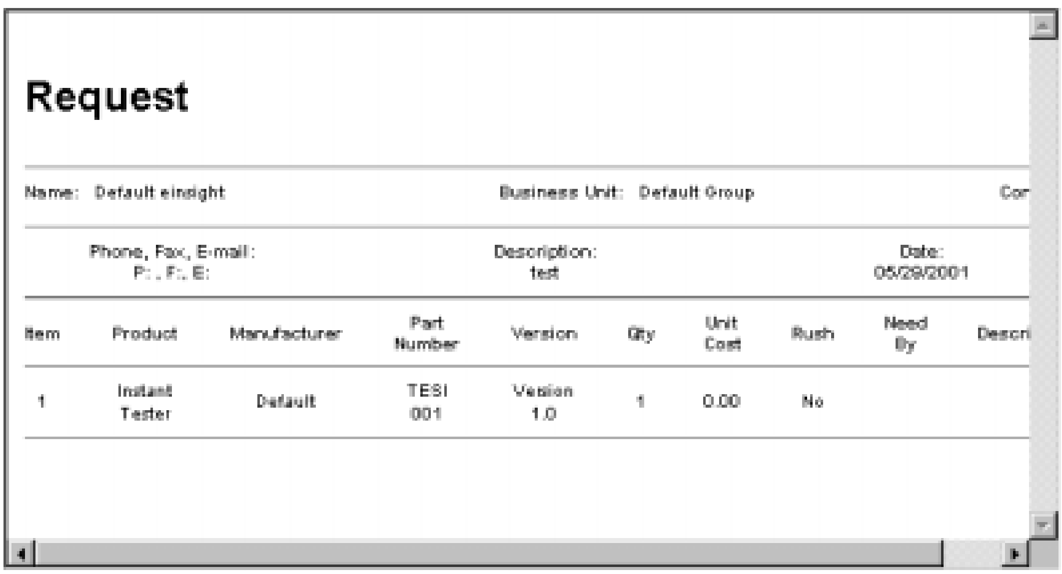
After you approve a request, the requested items can be ordered with Buyer. See *Creating a new order* on page 43.

Printing a request

You can print a request created in Requestor, after you add items and are ready to submit it for review. Printing a request lets keep a printed record of it.

To print a request:

1. Open the Record Detail window of the request.
2. Click **Print**.
3. The Print Screen with the request details appears.



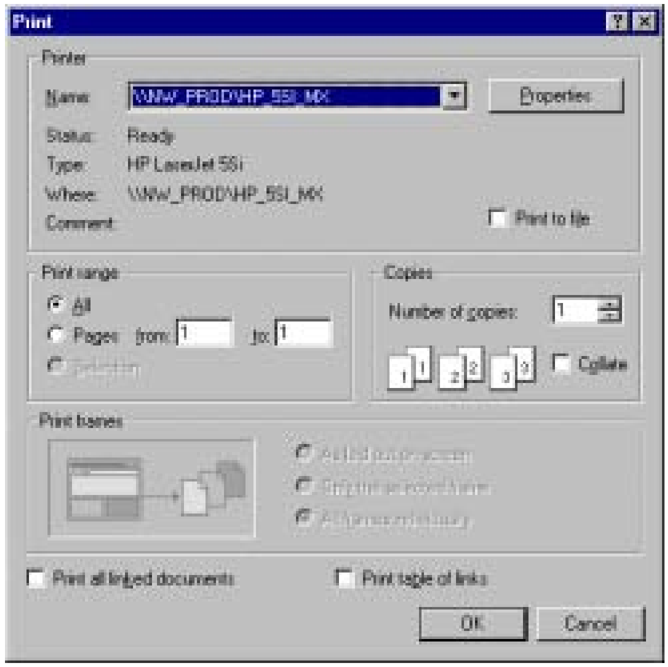
Request

Name: Default einsight   Business Unit: Default Group   Cor

Phone, Fax, E-mail:	Description:	Date:
P: , F: , E:	test	05/29/2001

Item	Product	Manufacturer	Part Number	Version	Qty	Unit Cost	Rush	Need By	Descri
1	Instant Tester	Default	TESI 001	Version 1.0	1	0.00	No		

4. Then Print function of your computer will appear.



5. Click **OK** to print.

Chapter 11. Buyer

Buyer overview

Buyer provides an easy way for you to order equipment, put orders into Enterprise Insight and your company's procurement process. Those with the responsibility of approving orders can do that as well in Buyer. Enterprise Insight provides a structured procurement process that begins when you request equipment, standardizes ordering, and adds it to inventory once received. You can also create Volume Purchase Agreements in Buyer.

Buyer welcome page

Start a New Order guides you through the process of creating and submitting an order. Options are provided to help you select the equipment from your company's product catalog or a list of standard configurations. You can base the order on a request or a similar previous order to save steps, if much of the information has already been entered on one of these documents.

Finish an Order You Started helps you find an order you started but didn't complete, perhaps because you were interrupted or didn't have all the information on hand.

Check the Status of Your Orders shows where your orders are in the procurement process; for example, whether your order has been approved and equipment has been received. You can check the status of orders at any time.

Approve Orders lists the orders that are waiting for your review. You can display document and item details, and then either approve or reject the orders. You can only use this link if you are an Enterprise Insight Reviewer.

Place Orders allows you to select an order and put it in your company's purchasing system.

Cancel Orders allows you to cancel orders already placed.

Start a New Volume Purchase Agreement guides you through the process of creating a volume purchase agreement to enter the terms and conditions of an agreement with a vendor to purchase equipment in volume. Once you create the agreement, you can create orders to purchase that are governed by its terms and conditions.

Finish a Volume Purchase Agreement You Started helps you find a volume purchase agreement you started but were unable to complete, perhaps because you were interrupted or didn't have all the information on hand.

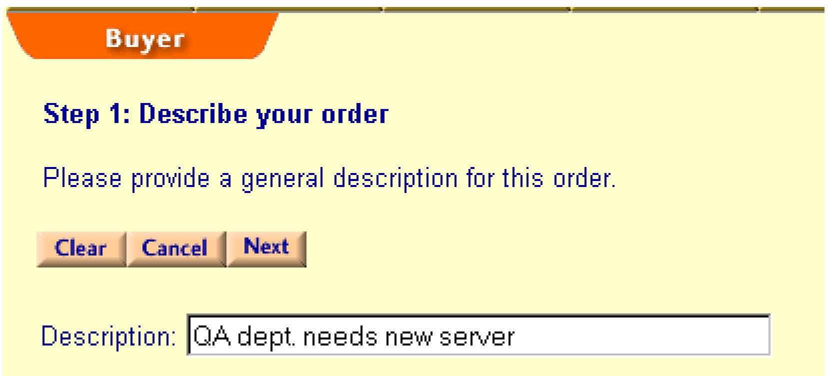
Creating a new order

You can use Buyer to create and submit orders for equipment. You can create an order by adding items from a request, items from an order, items from the product catalog or choosing a standard configuration. Each uses the same steps. The four steps are described below with a description of each method of selecting items following.

As you create an order, the top of each page will tell you which step you are on.

To create a new order:

1. Click **Buyer** in the toolbar.
2. Click **Start a New Order**.
3. Step 1 has you type in a brief description of your order such as "QA dept. needs new server", then click **Next**.



4. The second step lets you select how you want to create your order: *Add items from a request*, *Add Items From an Order*, *Add a Product*, or *Select a Standard Configuration*.

Add items from a request

This selects items from requests stored in Enterprise Insight to add to your order. After selecting your search criteria, you'll see a page of current requests. Click to select one to add to your order. The Shopping Cart page appears.

Add Items From an Order

This selects items from orders stored in Enterprise Insight to add to your order. After selecting your search criteria, you'll see a page of orders. Click to select one to add to your order. The Shopping Cart page appears.

Add a Product

This selects products stored in Enterprise Insight's catalog to add to your order. After selecting your search criteria, you'll see a page of products matching your criteria. Click to select one to make your order. The Shopping Cart page appears.

Select a Standard Configuration

Click this to use a standard configuration for the type of equipment you want to order. On Step 2, the search page, you can enter the name or description of a known standard configuration to narrow your search. On the results page, select the standard configuration you want to use. The Shopping Cart page appears..

5. Once you've selected the method, a search page appears. Enter any parameters you know about the item you want to order and click **Search.**
6. Click to select the item you want to place on the order (you can only add one item at a time) and click **Next**.

7. The **Shopping Cart** page appears. Here you can add additional items to the order by clicking **Add.**
8. Once done selecting items for the order on the **Shopping Cart** page, click **Next.**
9. Step 3 has you select a reviewer. Search for a reviewer by entering any known parameters about your reviewer to search on and click **Search.**
10. A list of reviewers appears. Click to select the one you want by clicking to check the box next to their name and click **Next.**

11. The fourth step is to save or submit your order. You can edit your order if you want to add or delete items by clicking **Shopping Cart.** To make changes to the document, click **Edit.** If you aren't ready to submit your order for approval, click **Save**. If you are satisfied with your order and ready to move it into the approval process, click **Submit**.

12. A page with the purchase order for your order appears. It is recommended you print this page for your records. Click **Print** to print your order or **Home** to return to the **Buyer** home page.

You can check the status of your order at any time by clicking **Check the Status of your Orders** on the Buyer home page.

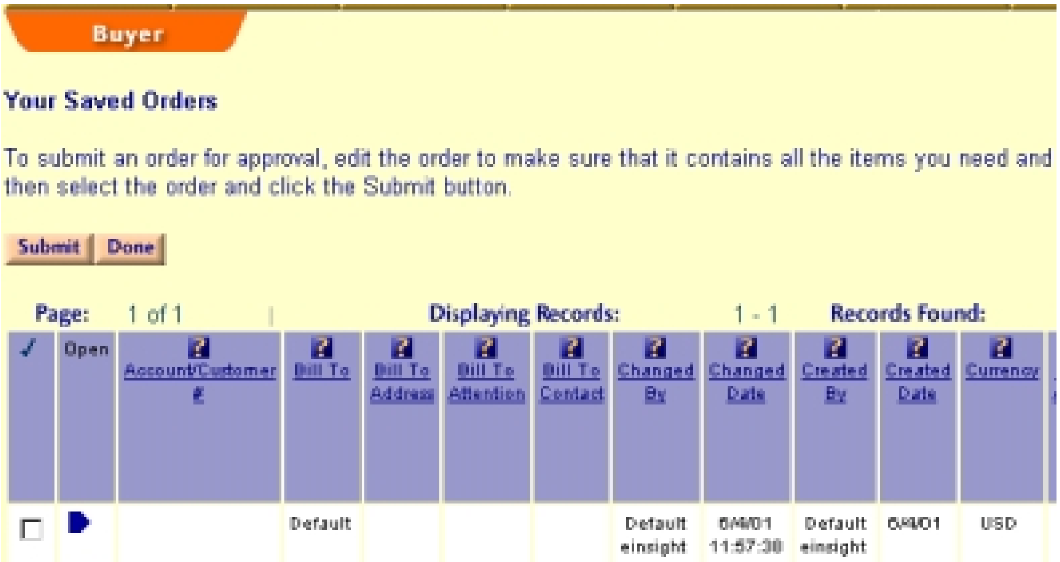
Finishing an order you started

You can use Buyer to find, edit and finish an order that you previously started. You can edit any order that you have not submitted.

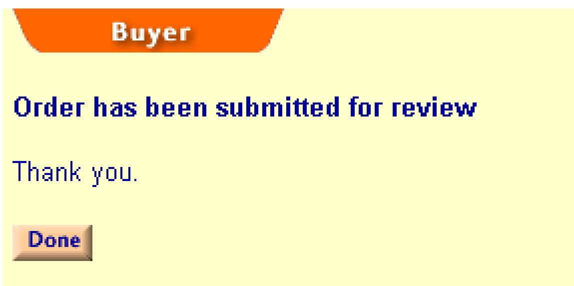
To edit or finish an order:

1. Click **Buyer** in the navigation toolbar, then click **Finish an Order You Started**.

2. A page with your saved orders appears. Click to check the order you wish to finish or edit.



3. To edit an order, click the open arrow to open the record detail for the order.
4. To submit an order, click to check the order and click **Submit.**
5. You'll receive a confirmation of your order being submitted for review.



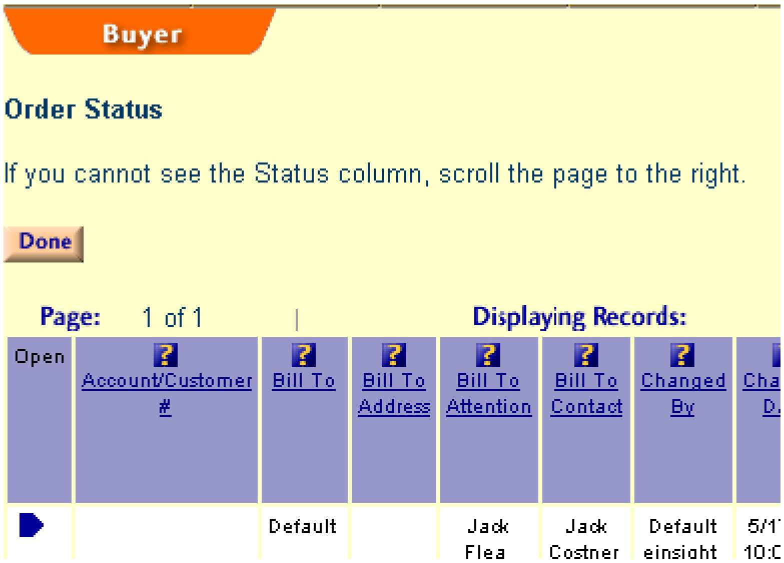
6. Click **Done.** You'll be returned to **Your Saved Orders**. If done editing and submitting your orders, click **Done**.

Checking the status of your orders

After you submit an Order, you can periodically check on how the order is progressing through your organization's process; for example, whether it has been approved or rejected, and if approved, whether the products have been ordered for you.

To check on your submitted orders:

1. Click **Buyer** in the toolbar.
2. Click Check the Status of Your Orders.
3. A page with a list of your submitted orders appears. Scroll to the right if you can't see the **Status** column.
4. When done, click **Done** and you'll be returned to the Buyer home page.



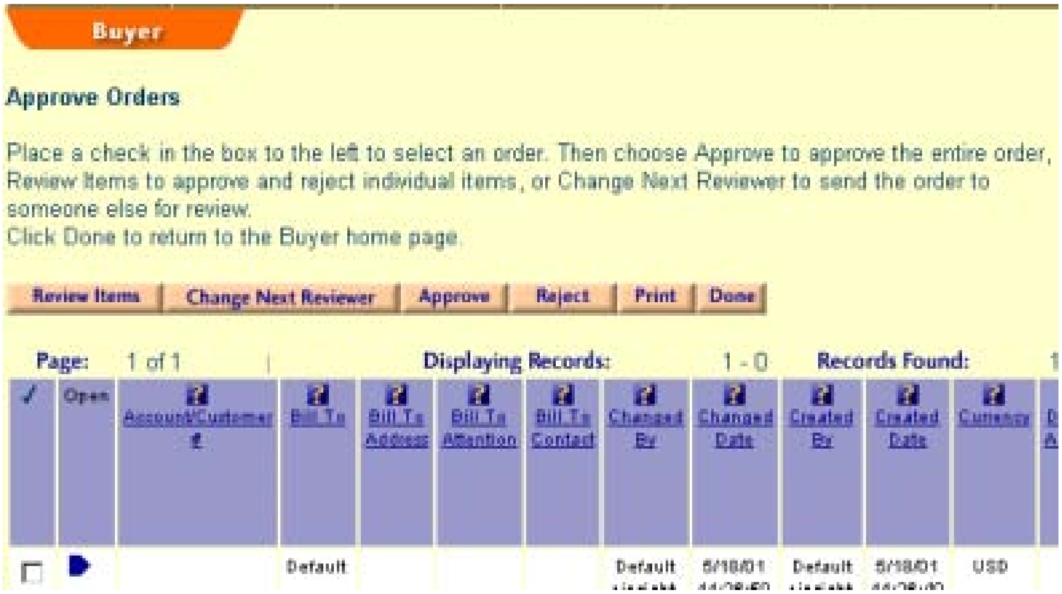
If you have questions about the status of your orders, contact your manager.

Approve orders

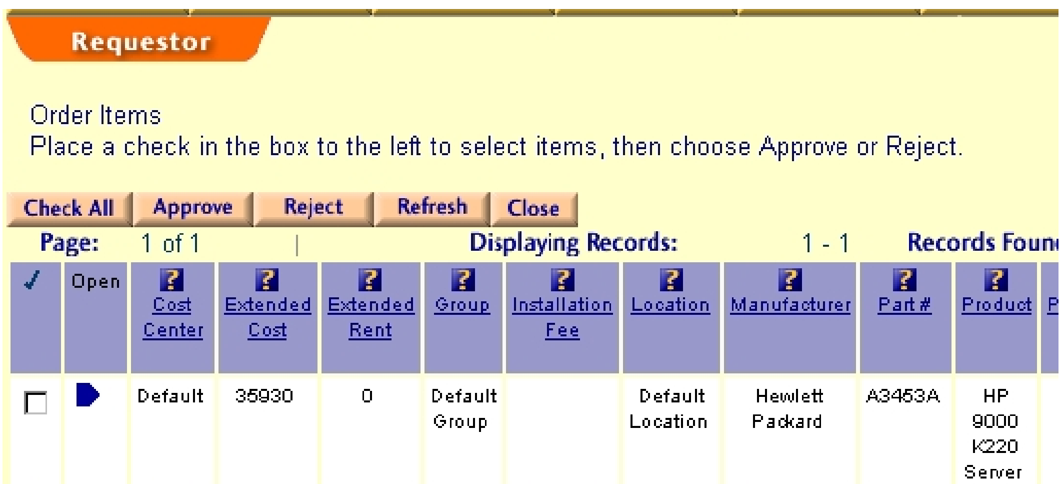
If you are designated as a Reviewer in Enterprise Insight, use Buyer to list the orders waiting for your approval. You can display order and product details, review orders, approve or reject each order, change the next reviewer, or print an order. Only Enterprise Insight reviewers can use this link.

To review orders pending your approval:

1. If you are at the Insight Today page, click **You Have Orders to approve** and skip down to step 4. From any other page, click **Buyer** in the toolbar, then click **Approve Orders**. Only orders with a status of Submitted for Review will be displayed.
2. Click to select the order you want to work with.
3. You can approve an order, and all the items on it, by placing a check in the box to the left and clicking **Approve**. Or click **Review Items** to view the list of items on the order.



4. When you click **Review Items**, the **Order Items** page from Requestor opens. You can edit the items on the order by clicking **Open**. For each item, when done editing, click to select the item, then click either **Approve** or **Reject**. You'll be returned to the **Approve Orders** page.



5. You can approve some or all of the items by placing a check in the box to the left and clicking **Approve**. Use **Check All** to quickly check and uncheck all the items on the page. Then close the Review Items window, and click **Approve** on the Approve Orders page to change the status of the order to Approved.

6. You can reject some or all of the items by placing a check in the box to the left and clicking **Reject**. Then close the Review Items window, and click **Reject** on the Approve Requests page to change the status of the order to Rejected.

> If at least one item is approved on an order, you must click **Approve** on the Approve Orders page.

7. On the Approve Orders page, you can change the next reviewer. If you have reviewed your part, but need someone else to approve or look at it, click to check the order and then **Change Next Reviewer** to have it placed in their queue.

8. The **Find a Reviewer** search page appears. Enter any known criteria to search on, or leave all fields blank, then click **Search.**

9. Choose a reviewer from the search results page by placing a check in the box by their names and clicking **Select**.

10. A confirmation of your order being sent to the next reviewer appears. Click **Done** to return to the **Approve Orders** page.

11. To reject an order, click to check the order and click **Reject.** You'll receive a confirmation of your rejection. Click **Done** to return to the **Approve Orders** page.

12. To print an order, click to check the order and click **Print**. You'll be presented with your computer's print settings window. Choose your printer and click **Print.** See *Printing a request* in the Requestor section for an example.

> You can also **save** an order as an HTML document (using your browser's menu, Save As from the File menu), or **email** it (using your browser's menu, choose Send, Page by Email from the File menu).

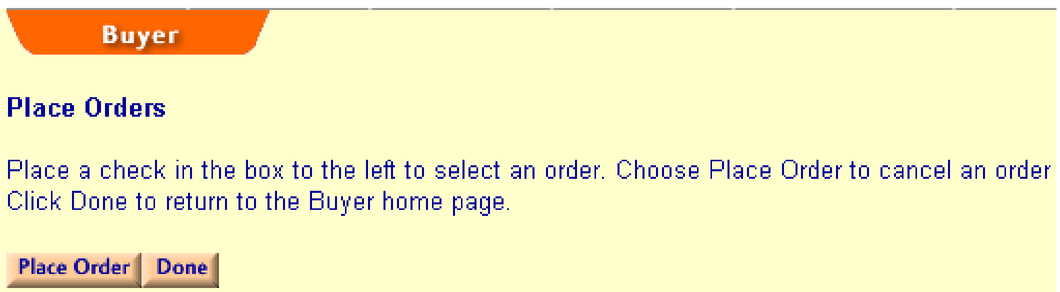
Place orders

You can use Buyer to place your orders with the selected vendor(s) or lessor(s).

To place an order:

1. Click **Buyer** in the toolbar.

2. Click **Place Orders**. Only orders with an Approved status are displayed.



3. Click to place a check next to the order, then click **Place Order**. A confirmation screen will appear. Click **Done** to return to the **Place Orders** page. If through placing orders, click **Done** to return to the Buyer home page.

Cancel orders

You can use Buyer to cancel your orders with the selected vendor(s) or lessor(s).

To cancel an order:

1. Click **Buyer** in the toolbar.

2. Click **Cancel Orders**. Only orders with an Ordered status are displayed.

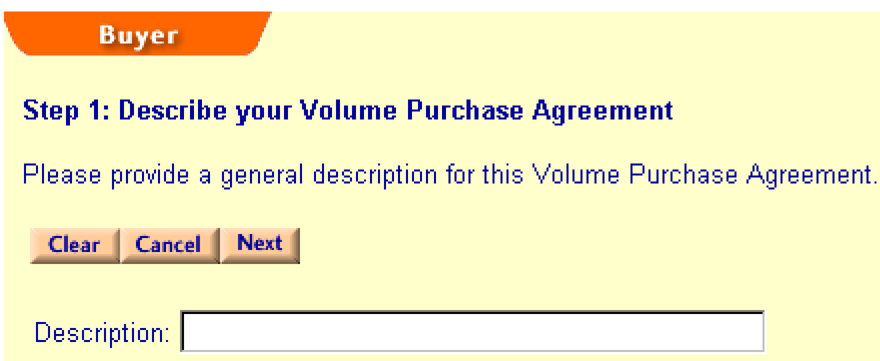
3. Click to place a check next to the order, then click **Cancel Order**. A confirmation screen will appear. Click **Done** to return to the **Cancel Orders** page. If through canceling orders, click **Done** to return to the Buyer home page.

Creating a volume purchase agreement

You can use **Buyer** to enter the terms and conditions of an agreement with a vendor to purchase equipment in volume. The agreement is made between a supplier and a group in your organization and has a specific commencement date and length. Once you create a volume purchase agreement (VPA), you can create orders to purchase that are governed by its terms and conditions.

To create a volume purchase agreement:

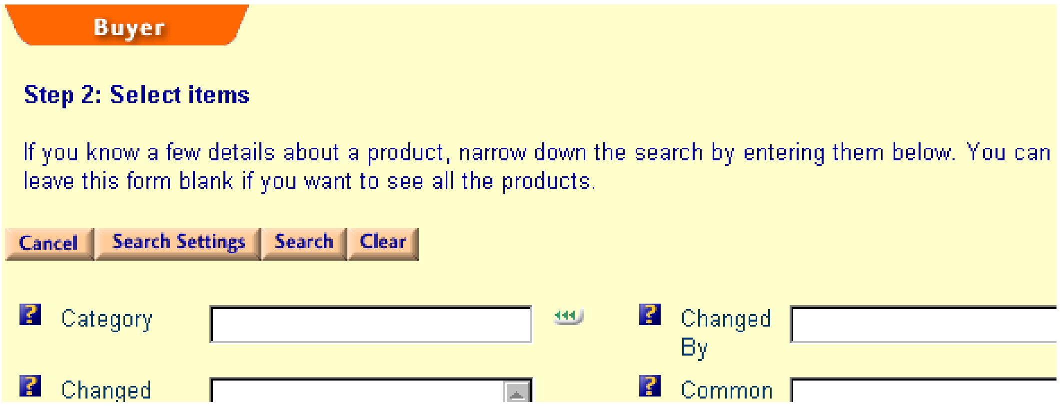
1. Click **Buyer** in the navigation toolbar.
2. Click **Start a New Volume Purchase Agreement**.
3. Step 1, enter a brief description of your new VPA then click **Next.**



4. Select one of the following:
   - **Select a Standard Configuration** opens the Standard Configuration Search screen. Enter any value that you know or leave the fields blank and click **Search**. Select the standard configuration you want by placing a check in the box to the left and clicking **Select**.
   - **Add a Product** opens the Product Search screen. Enter any details that you know or leave the fields blank and click Search. Select the product you want by placing a check in the box to the left and clicking **Select.**

5. To continue selecting products, click **Add** on the Volume Purchase Agreement Items page and repeat step 3. To remove an item, place a check in the box to the left and click **Delete**. To edit an item, for example to change the quantity or add missing information, place a check in the box to the left and click **Edit**, make any changes and click **Save**.

At this point, all items must be edited with their required information, before proceeding. **Quantity, Amount, Discount, Discount Amount** should be entered in the item's record.



6. When you have completed your list of products, click **Next**.

7. The **Volume Purchase Agreement Record Detail** page opens. Enter any missing required information (fields in red) and include any additional details you want to record about the volume purchase agreement. Then click **Next**.

8. Under Step 4, you **Save** or **Commence** your VPA.

9. You can edit your VPA if you want to add or delete items by clicking **Shopping Cart.** To make changes to the VPA, click **Edit.** If you aren't ready to commence your VPA, click **Save**. If you are ready to commence it, click **Commence**.

10. A page with your VPA appears. It is recommended you print this page for your records. Click **Print** to print your VPA or **Home** to return to Buyer.

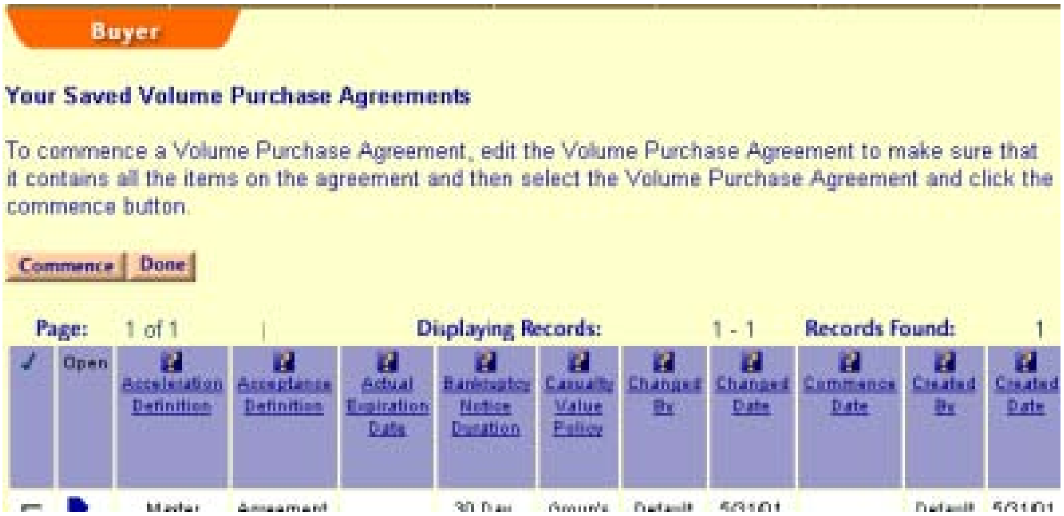
Finishing a volume purchase agreement

You can use Buyer to find, edit and finish a volume purchase agreement (VPA) that you previously started. You can edit any agreement that you have not put in active status.

To edit or finish a volume purchase agreement:

1. Click **Buyer** in the navigation toolbar, then click **Finish a Volume Purchase Agreement You Started.**

2. A page displaying all unfinished VPAs appears.



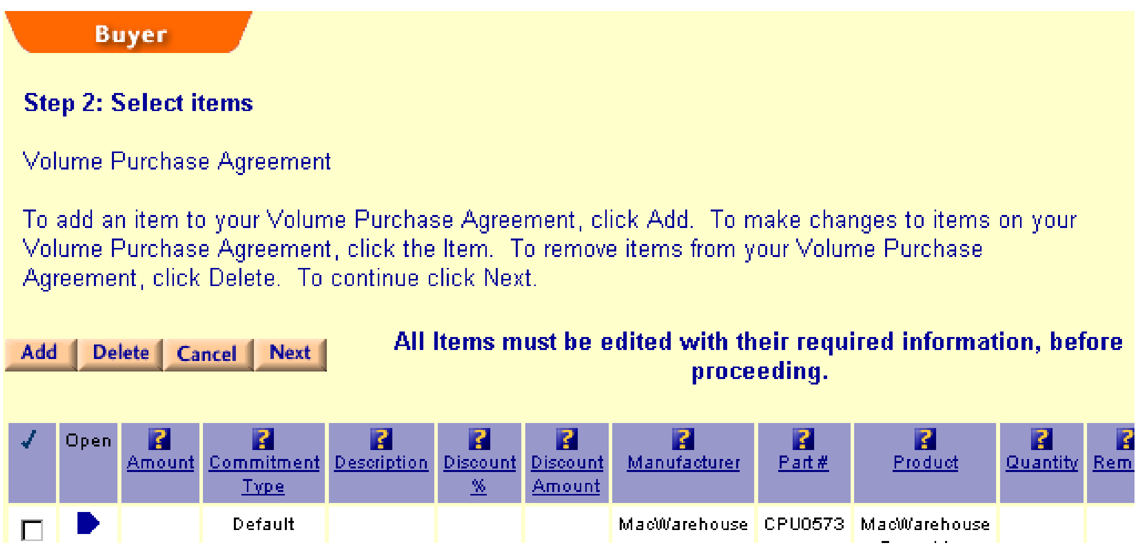
3. Before commencing the VPA, be sure to edit it to make sure all items on the agreement are included. To edit the VPA, click **Open**.

4. The VPA's record detail window appears. View and make any needed changes.

5. When finished editing, or viewing, the VPA, click **Save**. When the save is complete, click **Cancel** to close the record detail window.

6. Click to select the VPA and click **Commence.**

7. The **Ready to Commence** page appears. Enter the commence date in the text box provided and click **Commence** to start the VPA. If you don't wish to commence the VPA at this time, click **Cancel** to return to the **Buyer** home page.



8. Once you have entered the date and clicked **Commence**, you'll receive a confirmation of your save. Click **Done** to return to the Saved VPA page.


Receiver
Volume Purchase Agreement has been commenced
Click Done to return to the Volume Purchase Agreement Management page.
Done

Chapter 12. Receiver

Receiver Overview

Receiver provides an easy way for you to record the receipt of equipment when it arrives. When you record ordered items, Enterprise Insight automatically updates the status of those orders. You can also add items not ordered to a receipt, if extra items are included in a shipment. After you create a receipt, you or someone else at your company can inspect the items in the shipment, accept or reject them, and subsequently receive those items into inventory. From Receiver's home page, you can:

Start a New Receipt assists you in finding the original equipment order that was sent or creating a receipt when unordered items arrive.

Finish a Receipt You Started provides quick access to all your receipts in Edit status, so you can continue working on them until you complete them, accept or reject the items, and receive the assets into inventory if this is part of your process.

Check the Status of Your Receipts lets you find up-to-date information on your receipts.

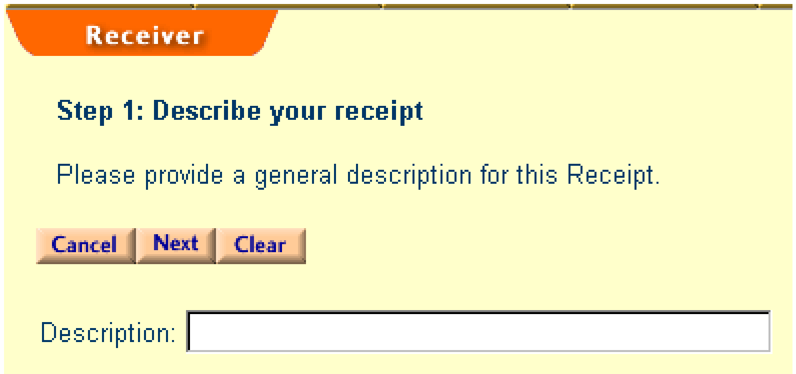
Creating a Receipt

Receiver assists you in receiving, and creating assets, in inventory. It guides you step-by-step through the procedure of creating, finishing or checking the status of receipts.

It also helps in finding the original order that was sent, adding or modifying information about the items in the shipment, and creating assets in inventory.

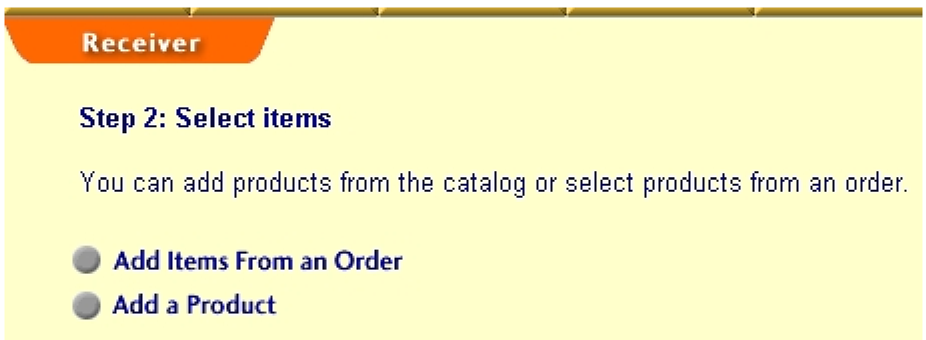
To create a receipt for items your company ordered:

1. Click **Receiver** on the navigation toolbar.
2. Click **Start a New Receipt**.



3. Enter a brief description for your receipt, then click **Next**.

4. Add items to a receipt by using **Add a Product** (only for unsolicited items) or **Add Items from an Order**.



5. Clicking either one will bring up a search screen. Fill any criteria you know about the order or products and click **Search**.

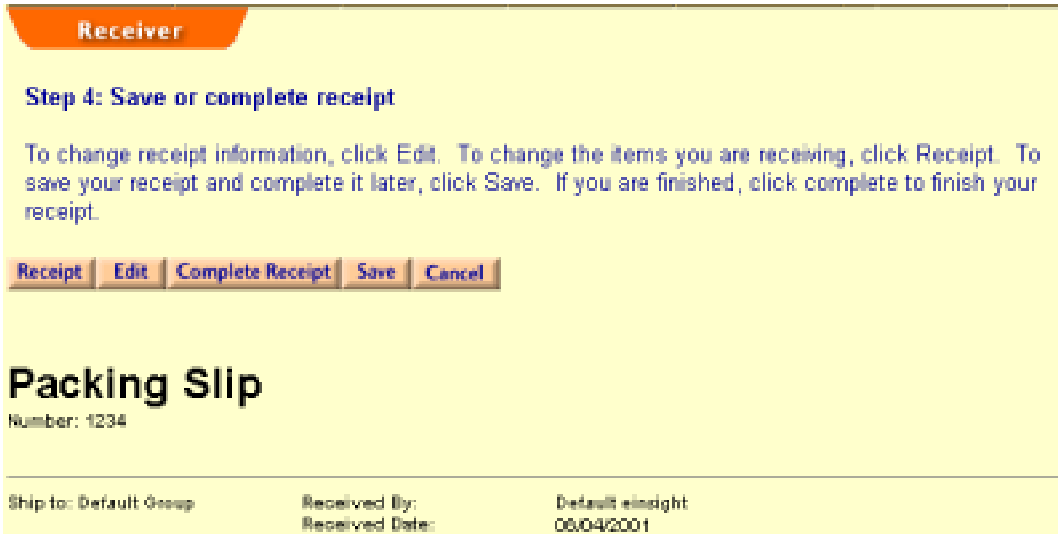
6. On the search results page, click to select the item or order you want to add to the receipt. Click **Select**.

7. A page, similar to the Shopping Cart page in Buyer, appears. Items will be listed as either **Ordered Items** or **Unsolicited**. If there are unsolicited items on your receipt, you will need to click to open its record detail window and fill in the missing information. You will also be prompted to enter in quantity received, quantity accepted and any other missing information before you can proceed.

8. The next page, the Record Detail window of the receipt, allows you to edit the receipt itself, adding such information as the packing slip number, received date, and tracking number.

9. Click **Next** when you've completed the details for your receipt.

10. Step 4 shows your packing slip (or receipt) and allows you to add more items from your shopping cart or edit the receipt by clicking **Receipt**, **Edit** the receipt, **Save** it to finish later (such as if you had more items from this order arriving soon) or **Complete Receipt.**



11. If you click **Save**, you will receive a confirmation message that the receipt has been saved and are given the options of printing a receipt at this point. Click **Print** to print the receipt. Click **Home** to return to the Receiver home page and begin another receipt.

> Note: Enterprise Insight does not enter the assets on a receipt into inventory until a receipt is **completed**.

You can print a packing slip when you create a receipt, after you add items and complete document information. Printing a packing slip from the receipt lets you create a packing slip when one is not included in a shipment. You can also save a packing slip displayed in the Print window using your browser's **Save As** function or use your browser's **Send Page** and then email it as a file attachment.

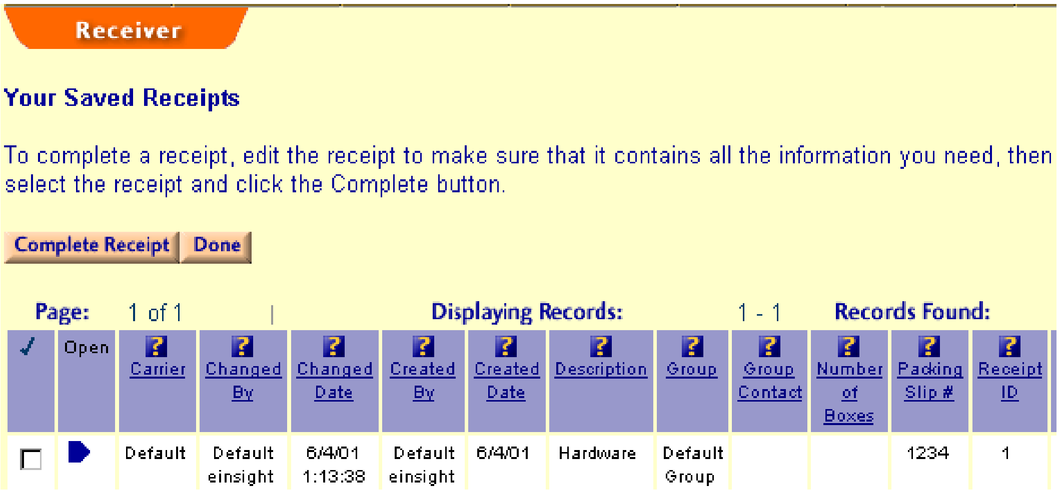
Finishing a Receipt

You can use Receiver to find, edit and finish a receipt that you previously started. After you receive items, they have to be accepted and added to inventory to finish the receipt.

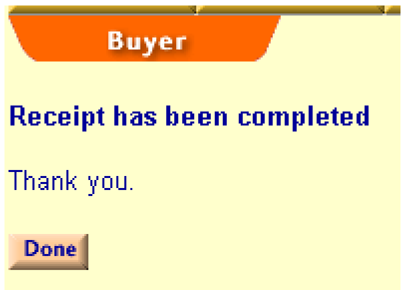
To finish a receipt:

1. Click **Receiver** in the navigation toolbar, then click **Finish a Receipt You Started**.

2. **Your Saved Receipts** appears. Click to select the one you want to finish and then click **Complete Receipt**. If you click **Done**, you will cancel this action and return to the Receiver home page.



3. A confirmation of your submission of the receipt appears. Click **Done** to return to the Receiver home page.



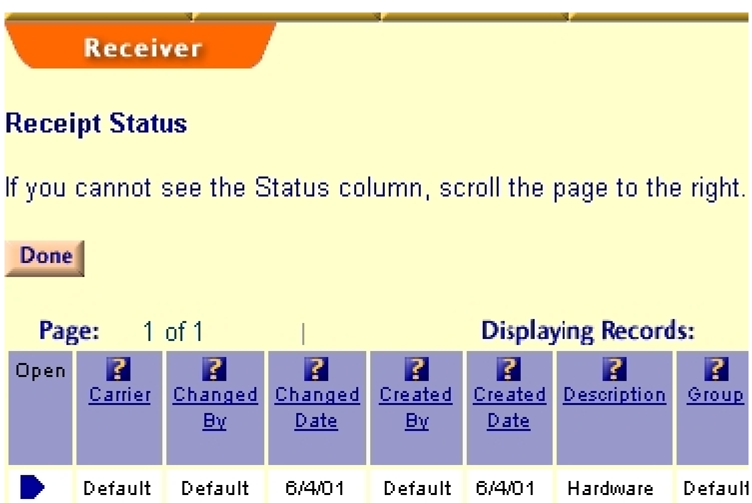
Check the Status of your Receipts

To check the status of your receipts:

1. Click **Requestor** in the navigational toolbar.

2. Click **Check the Status of Your Receipts**.

3. A list of all your receipts appears. Scroll to the right, if needed, to view the status bar. When done reviewing your receipts, click **Done** to return to the Receiver home page.



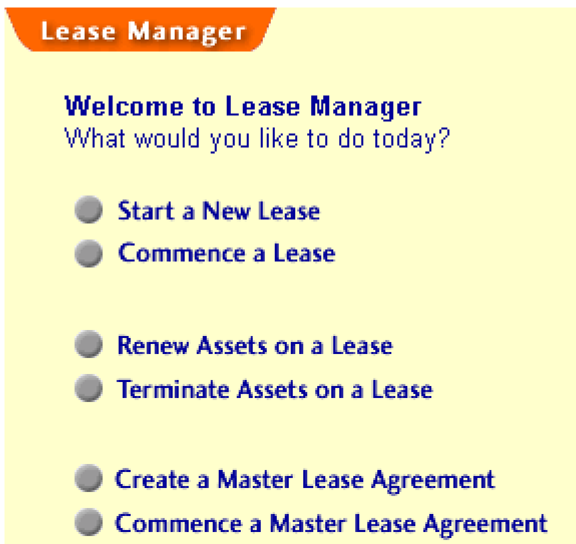
Chapter 13. Lease Manager

Lease Manager

The Lease Manager, purchased as an addition to Enterprise Insight, has options to view, enter, and modify terms and conditions of leases and schedules. The lease can record the following types of details:

- The lease number, schedule, MLA, general group and lessor information.
- Contact and address information for billing purposes and billing terms
- Early termination, renewal and purchase option information.
- Specific assets on the lease.

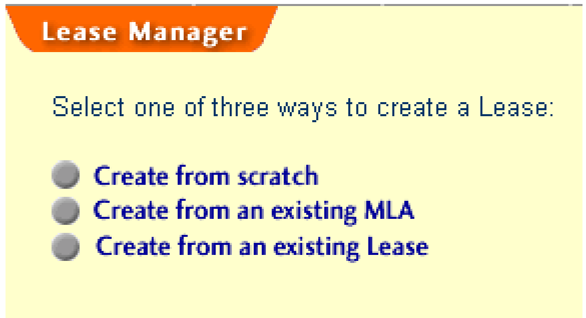
Enterprise Insight assigns a unique Lease ID to all documents to help you find and manage them. Some documents may never be printed; they are online forms you use and save. From the Lease Manager's home page you can *Start a new lease*, *Commence a lease*, *Renew assets on a lease, Terminate assets on a lease*, *Create a master lease agreement*, and *Commence a master lease agreement*.



Start a new lease

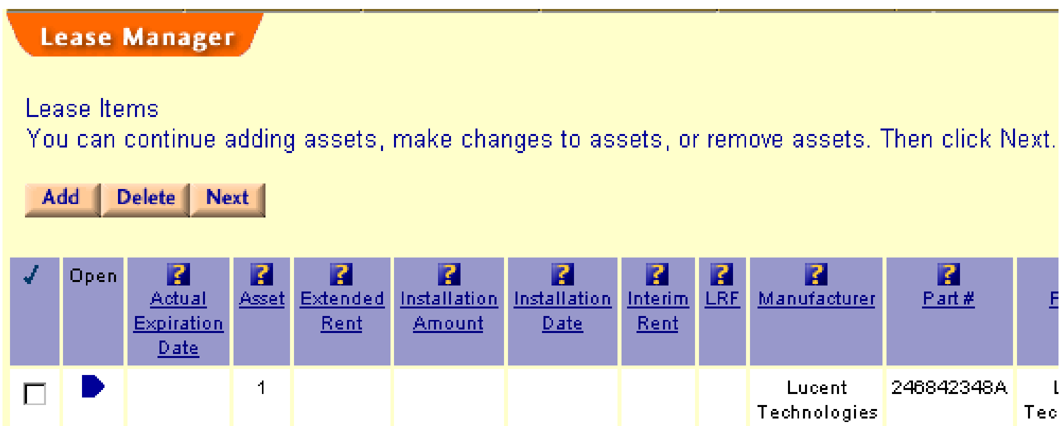
To create a new lease document:

1. Click **Lease Manager** in the toolbar, then click **Start a New Lease**.
2. Click to choose: *Create from scratch*, *Create from an existing MLA* or *Create from an existing lease.*

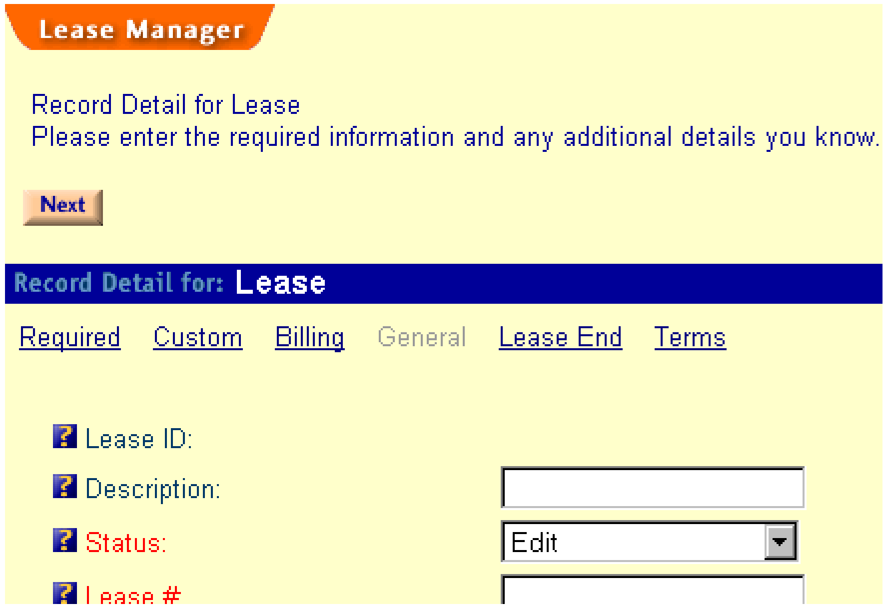


Create from scratch

1. Click **Create from scratch**.
2. The **Find an asset** page appears. Enter any values you want to use to narrow your search and click **Search**.
3. On the search results page, select the asset you want to include in the lease.
4. Click **Next**. The Shopping Cart page appears.



5. If you want to add additional assets, click **Add**. If you have assets on the lease you want to remove, click to check them and click **Delete.** If you are done entering assets for this lease, click **Next**.
6. The record detail for the new lease opens.



7. Fill in all required fields (marked in red) and enter information in any other fields you want included on your lease. Then click **Next**.
8. The lease document appears and you can either click **Save** to save the lease or **Commence** to start a lease. If you click **Add**, you can add additional assets to the lease document. If you want to edit any of the lease details, such as status, lessor or schedule, click **Edit.**
9. Once you've completed any edits or additions to the lease, click **Save** or **Commence**. Otherwise, the lease document will not be saved in Enterprise Insight.

Create from an existing MLA

1. On the Lease Manager home page, click **Start a new lease.** Then click **Create from an existing MLA.**
2. The Search page appears. Enter any values you want to use in your search for an existing master lease agreement and click **Search.**
3. A list of Available Master Lease Agreements appears.

4. Click to select the MLA you want to use and click **Select**.
5. You will be taken to the **Find an asset** page. Follow the instructions under *Create from scratch* beginning at step 4.

Create from an existing lease

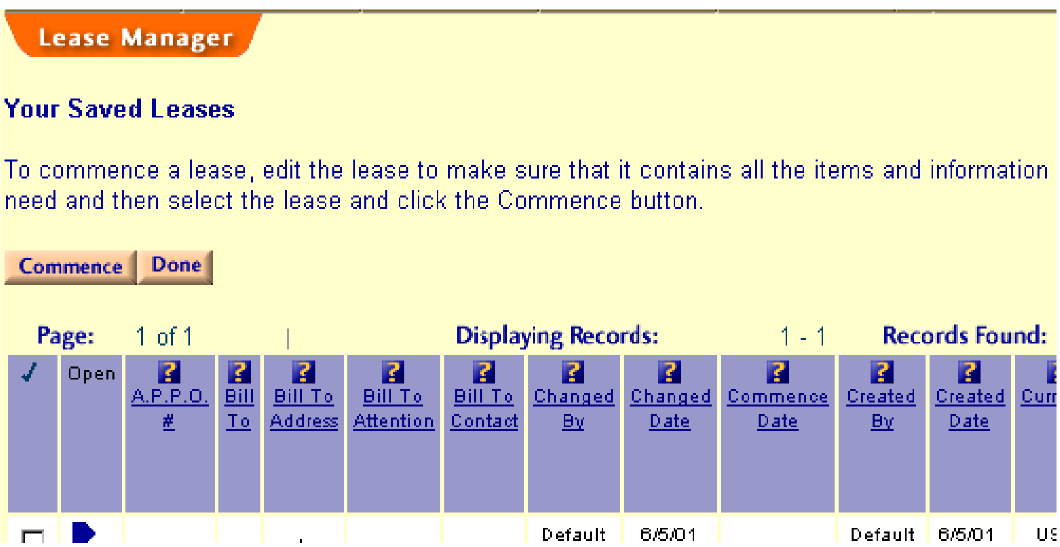
1. On the Lease Manager home page, click **Start a new lease.** Then click **Create from an existing lease**.
2. The Search page appears. Enter any values you want to use in your search for an existing master lease agreement and click **Search.**
3. A list of available leases matching your search criteria appears. Click to select the one you wish to use and click **Select.**
4. See step 4 under *Create from scratch* for the remaining instructions to complete the lease.

Commence a lease

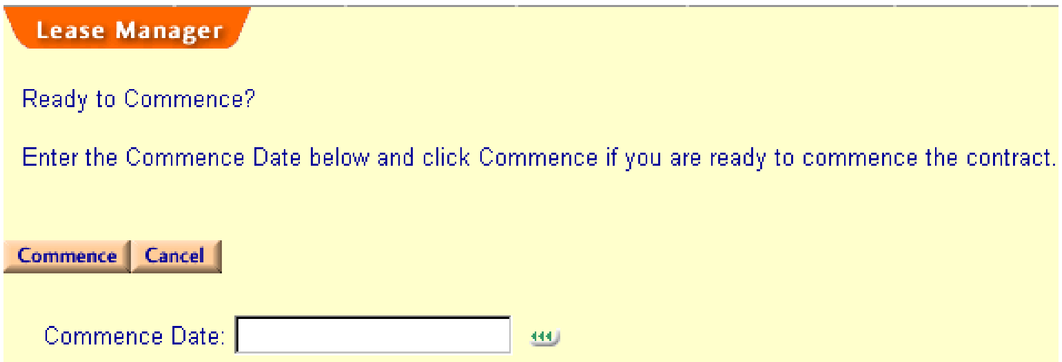
You can commence a lease when at least one item is entered and all required fields and the Commence Date are filled in.

To commence a lease using Lease Manager:

1. Click **Lease Manager** in the navigation toolbar.
2. Click **Commence a lease.**
3. A list of your saved leases appears. Click to select the lease you wish to commence.



4. Click **Commence.**
5. The next page prompts you to make sure you want to commence this lease. If you do, enter, or use the lookup button to enter, the date you want to start the lease. Then click **Commence**. If you do not wish to commence this lease now, click **Cancel.**
6. If you choose **Commence**, you'll receive a confirmation of the commencement. Click **Done** to return to the Lease Manager home page.



Renew assets on a lease

You can renew an entire lease or specific assets on a lease. When you renew a lease, Enterprise Insight creates a new lease document with the same lease number, schedule, MLA number, group and lessor as the original lease. These five fields may not be changed but other fields on the lease can be modified.

A lease may be renewed:

- At the end of its original term.
- Prior to the end of the original term.
- After the original term, when the lease is on a month-to-month basis.
- A Renewal is necessary only in case of a change of rates.

To renew assets on a lease:

1. Click **Lease Manager** in the navigation toolbar.
2. Click Renew assets on a lease.
3. A list of leases available for renewal displays. Click to select the lease you want to renew.
4. If you want to change any details on the lease, click **Open** to open its record detail window. Remember you cannot change the lease number, schedule, MLA number, group or lessor.
5. Once you have completed any changes to the lease in its record detail window, click **Save** and then close the window (click the **X** in the upper right-hand corner).
6. From the list of available leases, make sure the lease you want to renew is still checked.
7. Click **Renew**.
8. A list of assets on the lease appears. You can either renew all assets on the lease or some of them.

9. To renew all assets on the lease, click **Check All**. To renew selected assets, click to select those assets.

10. Click **Renew**.

11. The lease's record detail window appears. Make sure all required information is filled in and any additional information you want to edit or add. Then click **Next.**

12. You'll receive a confirmation of your renewal. Click **Print** to print a copy for your records or **Home** to return to the Lease Manager home page.

Terminate assets on a lease

You can terminate assets on a lease using Lease Manager. Termination:

- Records the termination of the lease or the individual assets on the lease.
- Records the shipment back to the lessor of the assets that were terminated.

To terminate assets on a lease:

1. Click **Lease Manager** in the navigation toolbar.

2. Click Terminate assets on a lease.

3. The Terminate Leases page appears with a list of lease you may terminate assets on.

4. Click to select the lease with assets you want to terminate. Then click **Terminate.** If you don't wish to terminate assets, click **Done** on this page to return to Lease Manager.

5. A page listing the assets on this lease appears. Click to select the asset(s) you wish to terminate. To terminate the entire lease, click **Check All**.

6. Once you've selected the assets for termination, click **Terminate.**

7. The Lease Record Detail window appears. Enter information, such as who to return the equipment to, the address where the equipment should be shipped, billing information or the last payment date.

8. Then click **Next**. You'll receive a confirmation message of the lease termination.

Create a master lease agreement

Use the Master Lease Agreement options to view, enter, and modify the terms and conditions of a master lease agreement (MLA) with a lessor. Once you create an MLA, you can create leases that are governed by its terms and conditions.

The Master Lease Agreement can record the following types of details:

- The MLA number, group, lessor and contact information.
- The policies that will govern all the leases created under the MLA; for example, the sublease policy, upgrade option and relocation consent.
- The provisions that will apply to all the leases created under the MLA; for example, whether your group has liability for loss, and whether early termination is allowed.
- The length of notice and other durations that will be required on all the leases created under the MLA.

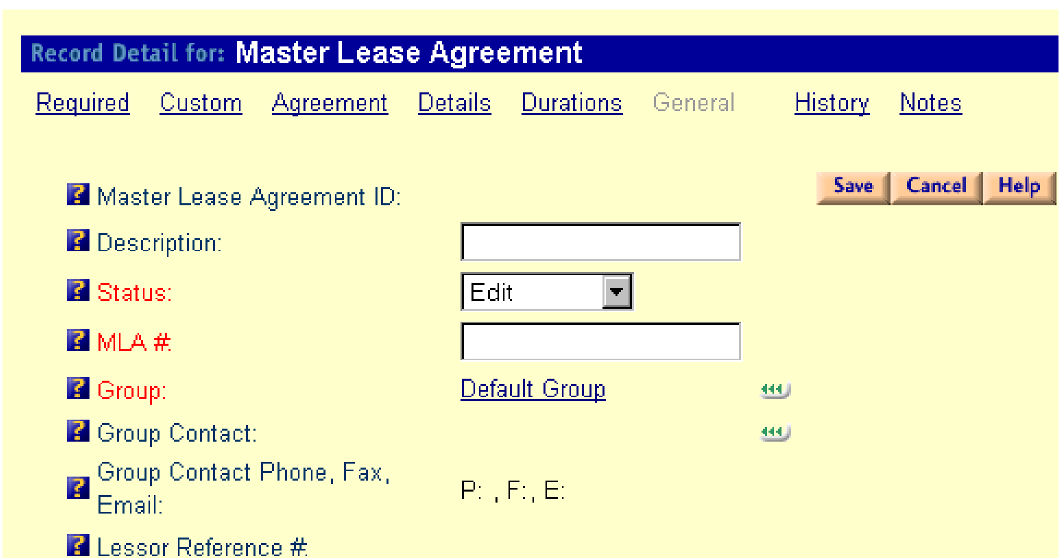
You must also commence a master lease agreement to make it active, after entering the MLA Date.

To create a master lease agreement:

1. Click **Lease Manager** on the navigation toolbar.

2. Click Create a master lease agreement.

3. The record detail window for the master lease agreement opens.



4. Enter in all required fields (in red) and any additional values you want included on the master lease agreement.

5. Click **Save**. You'll receive a message **Save is complete**. You can either continue to make edits to the MLA, clicking **Save** after each edit or click **Cancel** to return to the Lease Manager.

Commence a master lease agreement

You can commence a master lease agreement that has been saved in Enterprise Insight.

To commence a master lease agreement:

Click **Lease Manager** in the navigation toolbar.

Click **Commence a master lease agreement**.

A list of your saved MLAs appears.

6. You can either edit the MLA by clicking **Open** beside it or commence it by clicking to select it and clicking **Commence.**
7. The Ready to Commence page appears. Enter the commence date by either typing it in or using the lookup button and then click **Commence.** If you don't wish to commence this record, click **Cancel**.
8. A confirmation message will appear. Click **Done** to return your list of saved MLAs. If you want to commence another MLA, click to select it and follow the steps above. If you are finished, click **Done** to return to Lease Manager.

Chapter 14. Report Agent

Report Agent Overview

Using Report Agent, you can create and publish web reports with saved data that colleagues can view on the Enterprise Insight reports web site.

Once you create new report formats, you can save and reuse them with current data.

After logging in, you can immediately view or create a report by clicking a button to view or filter previously created reports, display report descriptions, create new reports, export reports and delete reports.

Descriptions of the types of reports available in Report Agent begin on page 75.

Reports are not saved unless you export them to Excel or save them as HTML files. See *Exporting Reports to Excel* on page 70 and/or *Printing Reports* on page 74.

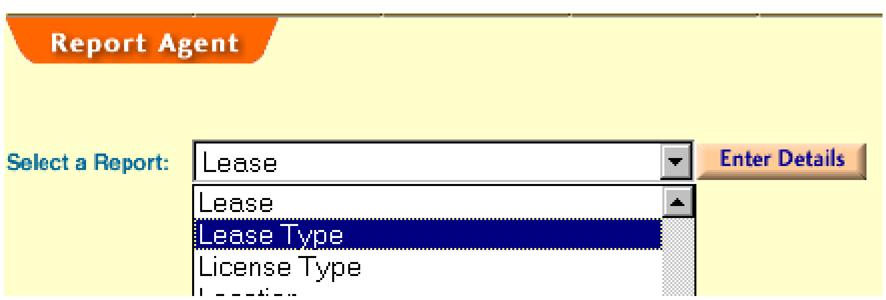
Creating a sample web report

The following shows how you can use the steps in Creating Reports on page 69 to create a comprehensive report that lists all leases in the Enterprise Insight database sorted by lessors and groups, with key information that you can filter to help manage lease commitments.

To create this **sample lease expiration report**:

1. Click **Report Agent** in the navigation toolbar.

2. Click **Create New**.



3. From the drop-down list, select **Lease** then click **Enter Details**. The report design form displays.
4. Type **Sample Lease Report** as the name for the new report in the **Report Name** field. The name will appear in the list of reports in the Report Agent window.
5. Type **lists all the leases; sorted by group and lessor** in the **Description** field.

6. From the Grouping 1 drop-down list, select **Lessor** to sort the report details. Check **Summary Group** to include subtotals and totals for Lessor.

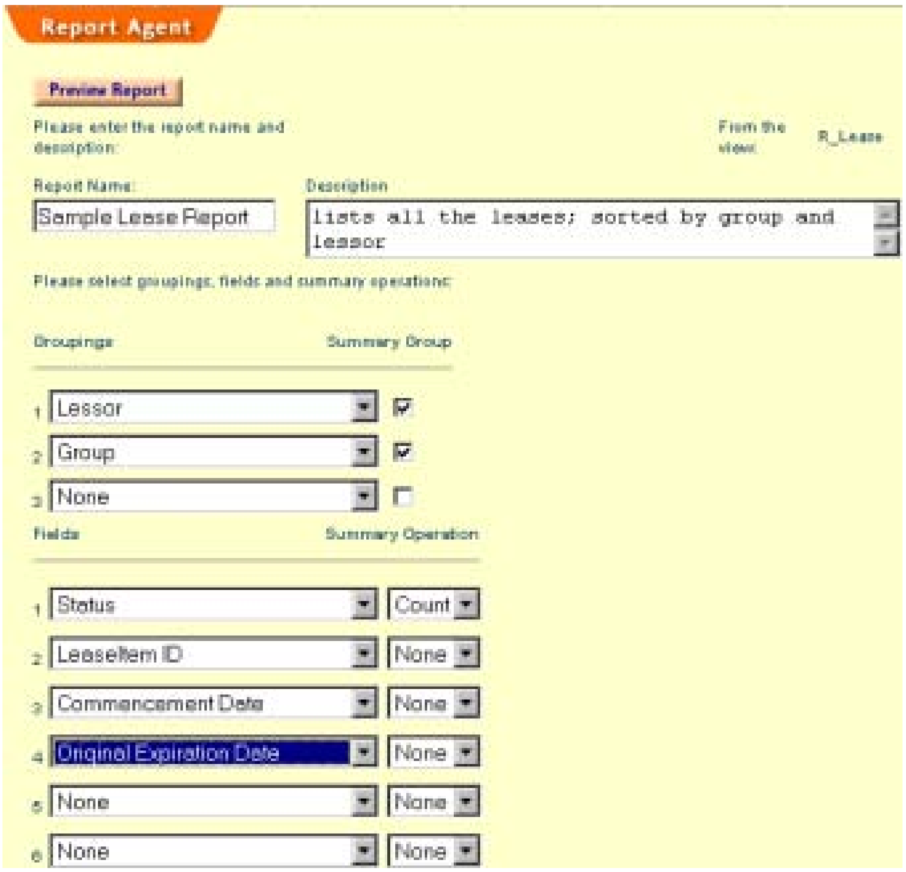
7. From the Grouping 2 drop-down list, select **Group**. Check **Summary Group** to include subtotals and totals for Group.

8. From the Fields 1 drop-down list, select **Status** to include in the report details section. In **Summary Operation**, select **Count** to insert the number of leases by status.

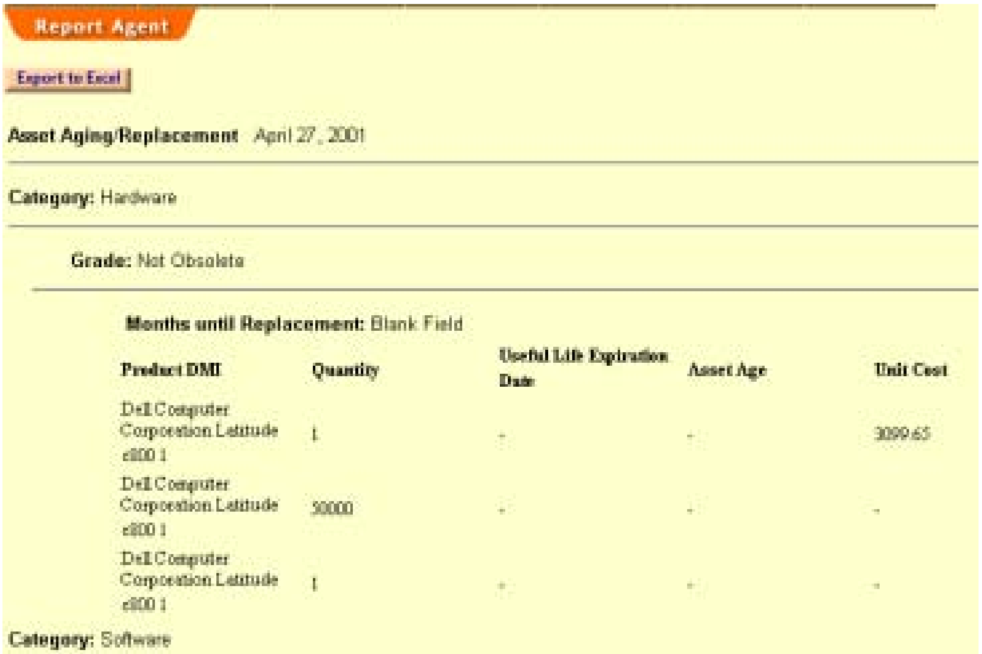
9. In Fields 2, select **LeaseItem ID**. Do not select a Summary Operation.

10. In Fields 2, select **Commencement Date**. Do not select a Summary Operation.

11. In Fields 4, select **Original Expiration Date**. Do not select a Summary Operation. The page should appear as the sample below.



12. Click **Preview Report** to see the report you created. The report displays in your browser window and is populated with live data.



13. Click **Save** to save the report format and add it to the Report Agent list.

Creating Reports

Report Agent guides you through report design. After designing a report, you can view it, print it, save it or export it to Excel.

To create a web report:

1. Click **Report Agent** in the navigation toolbar.
2. Click Create New.
3. From the drop-down list, select the type of report and click **Enter Details**. The report design form displays.
4. Type a name for the new report in the **Report Name** field. The name you type will appear in the list of reports in the Report Agent window.
5. Type a description for the report in the **Description** field, to identify the report.
6. Under **Groupings,** select the fields (at least one is required; maximum of three) to sort on and click to check the box under **Summary** Group if you want the report to include subtotals and totals for your grouping selections.
7. Next, choose the Fields to include in the report along with whether you want a summary operation performed on that field. You must select at least one field but can use up to 20. Next to **Field 1**, choose the first field you want in the report and whether you want calculations of **Sum**, **Count**, or **None**.
8. When finished selecting the fields to include, click **Preview Report**. There are Preview Report buttons at the top and bottom of the Report Agent page.
9. The report displays in your browser using data from the Enterprise Insight database.

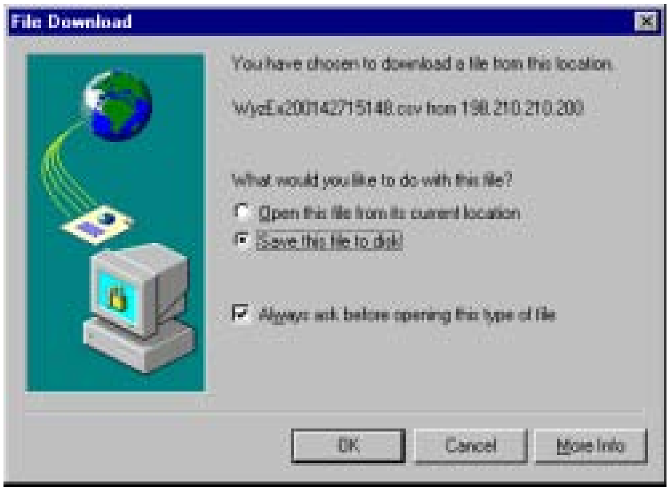
After viewing a web report, you can also export it to Excel. Click **Export to Excel** at the top of the preview window, then go to step 4 of *Exporting Reports to Excel.*

Exporting Reports to Excel

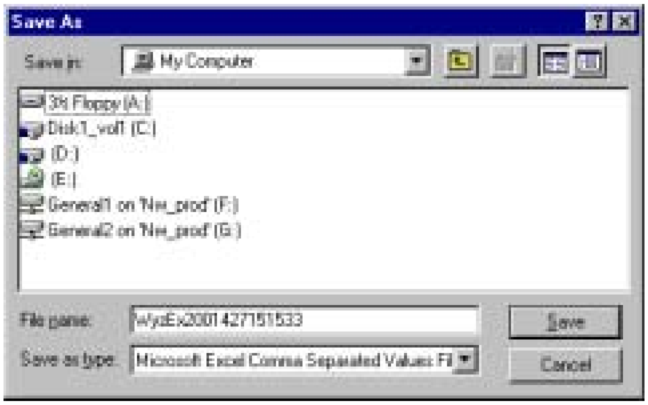
With Report Agent, you can export any reports to Excel.

To export web reports:

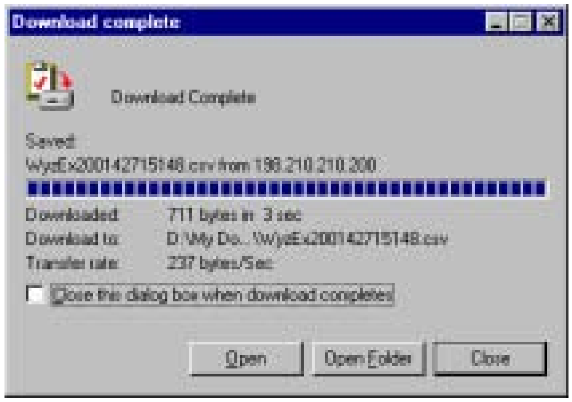
1. Click **Report Agent** in the navigational toolbar.
2. From the drop-down list, select the title of the report you want to export.
3. Click **Export**. The report displays in your browser window.
4. After clicking Export, you are given the option of **Save to disk** or **Open file from location**. **It is highly recommended** you save the file and open it from Excel.
5. Click to select **Save to disk**.



6. Click **OK**. You will be prompted to enter a location for the file. You may want to change the name of the generated report to one that is more descriptive. Then choose a folder to save to (one you will remember) and click **Save**.



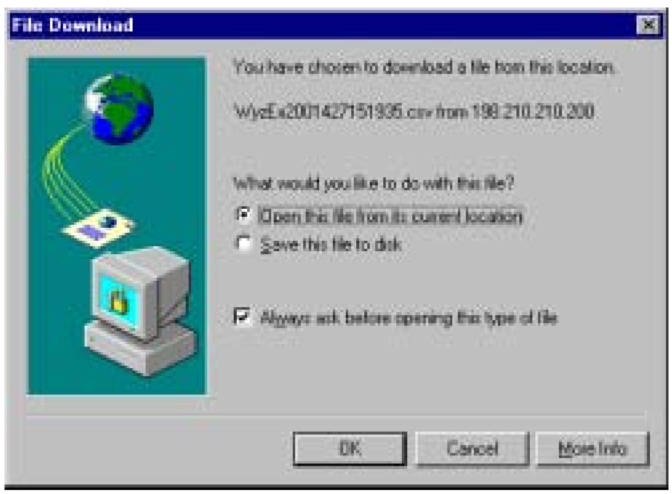
7. The file is saved to disk. You will receive notification of the download being completed.



8. Click **Open** to automatically open Excel and view the report. Click **Open Folder** to browse to the folder where you saved the report. Click **Close** to close the **Download** complete window. When you launch Excel, you can browse to the folder where you saved the report and open it.

To open from its current location (this is not recommended):

1. Click to select **Open this file from its current location** and then **OK**.



9. Your computer will launch Excel in your browser window. Save the file to disk from Excel by clicking **File → Save As →** from your browser menu; then rename the file and then select a location to save to.

10. After saving the file to disk, you can edit it in Excel.

> Remember to **delete** files once they are exported to save disk space. Exported files are saved into a temporary directory until you have named and placed them in a permanent place. The temporary files can be safely deleted without losing data once a report is saved.

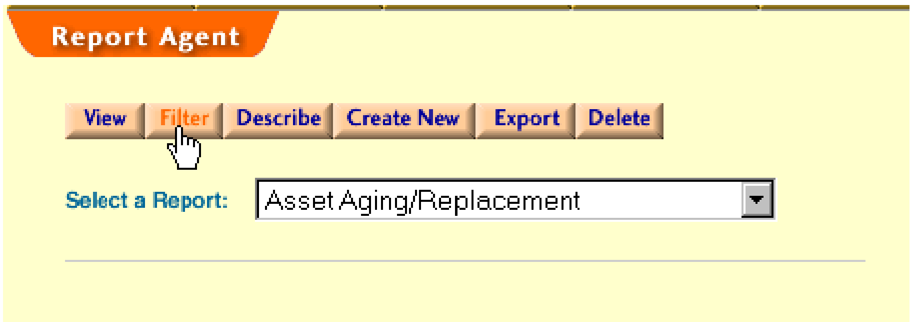
Filtering Reports

After logging in, you can immediately view web reports on Enterprise Insight data and filter those reports by criteria you specify. The data in the reports will be current data.

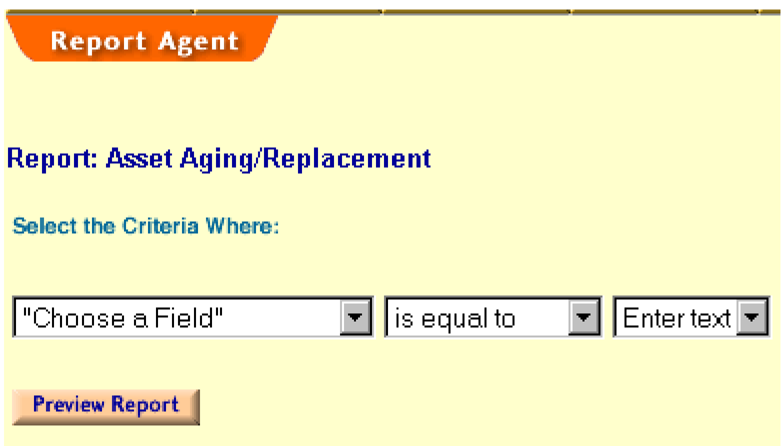
Do not use your browser's back button when creating filters. Undesired results can occur.

To filter web reports:

1. Click **Report Agent** in the navigational toolbar.
2. From the drop-down list, select the title of the report you want to filter and view.

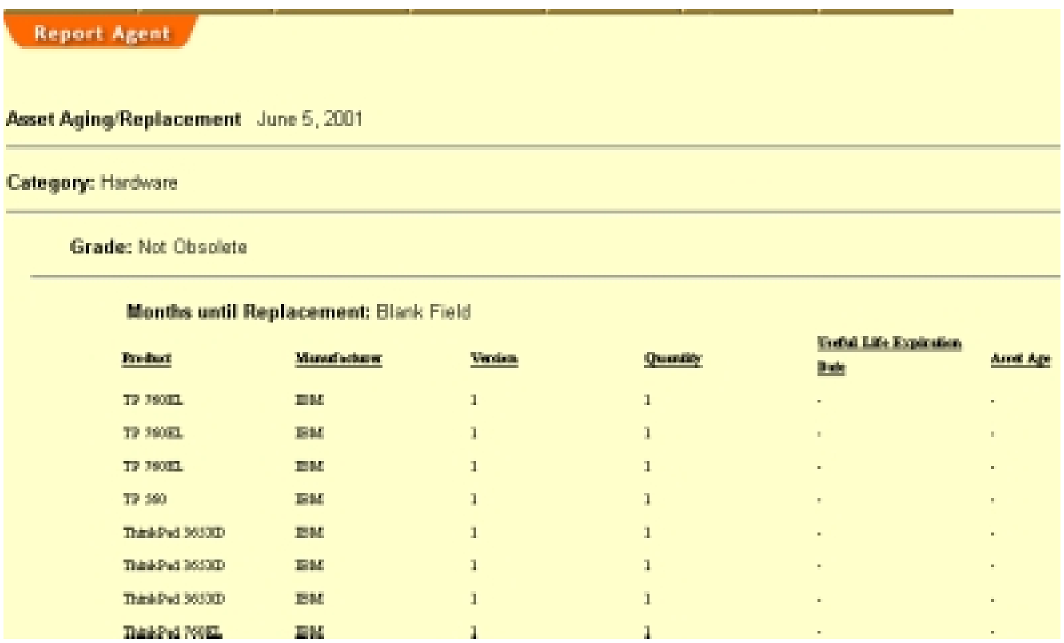


3. Click **Filter**
4. A page where you can select criteria to apply to the filter appears. From the first drop-down list, select the field for which you want to specify criteria. From the second drop-down list, select how you want to apply the criteria. Choose from: is equal to, is not equal to, is less than, and is greater than. In the third field, either select the criteria you want to apply from the drop-down list or enter the value in the field. This field will display a list for certain criteria you select.
5. Click **Preview Report.**



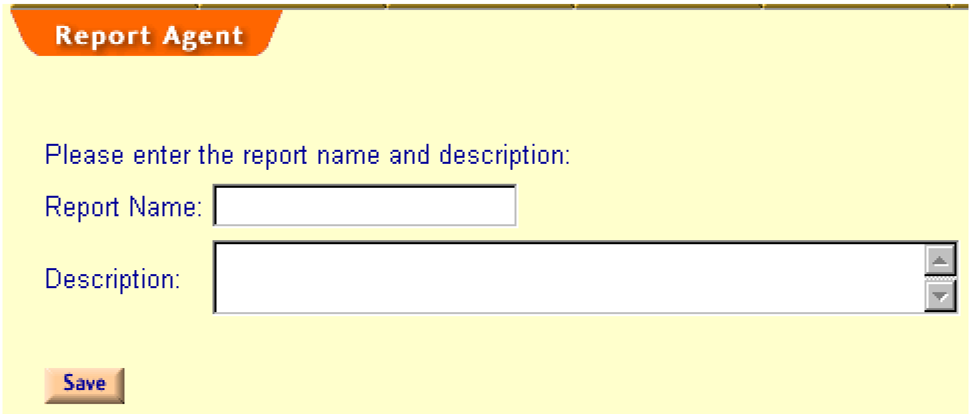
6. The next page gives you the opportunity to apply another filter, adding more customization to the report. To add more filters to the report, click **Apply Filters.**
7. Select either **And** or **Or**. If you select **And**, the report will include records that match both filters. If you select **Or,** the report will include records that match either filter. Then repeat steps 4 through 6 until you have entered all the remaining criteria. If you don't care to add any more filters, click **Preview Report.**

8. The filtered report displays in your browser window.



9. Click Save to save the report filters you entered. You can also export the report data to Excel. See *Exporting Reports to Excel* on page 70.

10. Enter a report name and description and click Save.



11. A confirmation of your save appears briefly and you are returned to the Report Agent home page.

Printing Reports

You can print any report that displays in the browser window.

1. Click **Report Agent** in the navigation toolbar.

2. Select the report to print from the drop-down menu and click **View**.

3. In your **browser's** toolbar, click **Print** or right-click anywhere on the report page and select **Print**.

It is advised, if a hard-copy report is needed, to export it to Excel, and print it there.

You can also save the report as an HTML document and print it later. Follow the link below to find out how.

Saving Reports with Data

When viewing a report, you can save it as an HTML file to preserve the report with its current data, and publish it for use by others in your organization.

> When you click **Save** after creating a report, you are saving the report format but not the data.

To save a report with the current data:

1. From the File menu in your **browser**, choose **Save As**.

2. Type a name for the new report in the File name field. Make sure you enter an .HTML extension for the file name. Save the file to any location. However we recommend that you save it to the Program Files\Enterprise Insight\Server\Report Agent directory if you plan to add it to the list of saved data reports. An example of the file name would be assetgroups.html.

3. Click **Save**.

The report, which was saved as an HTML file, can be opened in any browser and provided to others in your organization by sending via email as an attachment, saving it to a disk, or printing it.

Viewing Reports

You can view reports you or a colleague created with Enterprise Insight's **Report Agent**. You can also view report summaries and filter reports by criteria you specify. The data in the reports will be current data.

To view web reports with live data:

1. Click **Report Agent** in the navigational toolbar.
2. From the drop-down list, select the title of the report you want to view.

> If you want to see what's in a report before you view it, click **Describe**. After reading the description you can click View Report at the top of the description page.

3. Click **View**.
4. The report displays in the window.

After viewing a web report, you can export it to Excel. Or, if you want to view a summary report instead of a detail report, you can filter it. For information, see *Filtering Reports* on page 71.

Types of Reports

Asset Aging and Replacement Report

The Asset Replacement report is a management tool used for forecasting and budgeting the replacement of IT assets in a business unit or the company as a whole. This report shows the age of the assets in inventory compared to their useful life. This report enables asset managers to properly plan for asset replacement with a minimum amount of disruption to the business.

The following fields are included:

- Asset distribution by category
- Asset distribution by grade
- Months until replacement of the asset is necessary, calculated as the number of days between today's date and the Useful Life Expiration Date
- Product DMI (Desktop Management Information name) of the asset
- Quantity of each asset that is expected to be replaced, based on its useful life
- Useful Life Expiration Date of the asset
- Asset age in months, which is the amount of time between the Useful Life Start Date and today's date
- Unit Cost of the asset
- Fair Market Value of the asset

Asset by Group Report

The Asset by Group report lists all assets in inventory sorted by group, Category and acquisition status, providing a "big picture" view of all of your company's assets and the groups to which they belong. The extended cost is subtotaled by group and category.

The following fields are included:

- Group to which the asset belongs
- Product category of the asset
- Acquisition status of the asset, whether purchased or leased
- Enterprise Insight ID of the asset
- Serial number of the asset
- Equipment user to whom the asset is assigned
- Useful Life Start Date of the asset

- Product DMI (Desktop Management Information name) of the asset
- Extended Cost of the asset
- Stage of the asset in its lifecycle (dock, received, equipment user, etc.)

Asset Distribution by Stage Report

The Asset Distribution by Stage report shows the manager where the IT assets are in a business unit by stage; for example, assets that are currently at the receiving dock, assets that are undergoing maintenance, and assets that are assigned to equipment users. This report highlights any problem situations in the procurement process, installation process and maintenance procedures. The quantity is subtotaled by group and stage.

The following fields are included:

- Group to which the asset belongs
- Current stage of the asset
- Category of the asset
- Product DMI (Desktop Management Information name) of the asset
- Equipment user to whom the asset is assigned
- Quantity of each asset by category and stage

Assets on Expired Leases Report

The Assets on Expired Leases report identifies assets in inventory that are on expired leases. The report can be forwarded to IS personnel to help them return leased assets to lessors in a timely fashion and discontinue paying rent on those leased assets. The report includes subtotals, by cost center, of the combined unit rent and use tax.

The following fields are included:

- Cost Center to which the asset is charged
- Commencement Date of the Lease
- Original Expiration Date of the Lease
- Lease Duration
- Number of Months that the Lease has been Expired
- Manufacturer of the Leased Item
- Manufacturer Part Number of the Leased Item
- Product DMI of the Leased Item
- Serial Number of the Leased Item
- Unit Rent of the Leased Item
- Use Rate Tax of the Leased Item

Cost Depreciation Report

The Cost Depreciation report calculates the depreciation of assets in inventory using a straight-line depreciation method. Subtotals are calculated by location for accumulated depreciation and net book value

The following fields are included:

- Location of the asset
- Cost Center responsible for the asset
- Product DMI (Desktop Management Information name) of the asset

- Serial number of the asset
- Useful Life of the asset in months for depreciation purposes. However, if the Useful Life field is blank, the report uses 60 months as the basis.
- Current Depreciation, derived by dividing Total Unit Cost by Useful Life Value
- Accumulated Depreciation, calculated by multiplying Depreciation Value by number of elapsed months since the Start Date
- Net Book Value, the result of subtracting Accumulated Depreciation from Unit Cost

Equipment by Employee Report

The Equipment by Employee report provides detailed information about the assets assigned to each equipment user in Enterprise Insight. The report allows the Help Desk to see the exact configuration of a system when a user calls in. Only asset details are included in this report; equipment that has been ordered but not received is not included. The report can be sorted by group, employee, manufacturer, cost center and product.

The following fields are included:

- Group to which the equipment user belongs
- Employee Name, which is the name of the equipment user as it was entered in Enterprise Insight's Person Editor
- Configuration ID of the asset
- Category of the asset
- Serial # of the asset
- Cost Centers to which the asset is assigned
- Product DMI (Desktop Management Information name) of the asset
- Manufacturer part # of the asset
- Fixed Asset # of the asset

Equipment by Lessor Report

The Equipment by Lessor report identifies assets leased by your organization. This report shows the volume leased from a specific lessor, information that can be used to negotiate a better price for equipment or drop lessors that are used infrequently.

The following fields are included:

- Group to which the asset is assigned
- Lessor leasing the asset
- Master Lease Agreement #, governs the terms and conditions of the lease
- Schedule # of the lease
- Lease # of the lease on which the asset is included
- Product DMI (Desktop Management Information name) of the asset
- Quantity of the asset
- Unit Cost of the asset
- Extended Payment on the asset

Equipment by Location Report

The Equipment by Location report identifies both leased and purchased assets and their current physical location. The report includes one detail line for each asset at every location defined in Enterprise Insight in which assets are located.

The following fields are included:

- Location at which the asset can be found, and the physical address of the location
- Product DMI (Desktop Management Information name) of the asset
- Status of the leased asset; for example, lease or pending renewal
- Enterprise Insight ID of the asset
- Unit Cost of the asset
- Quantity of the asset
- Equipment User Name as it was entered in Enterprise Insight Person Editor

Equipment by Vendor Report

The Equipment By Vendor report identifies assets owned by your organization. This report shows the volume purchased from a specific vendor, information that can be used to negotiate a better price for equipment or drop vendors that are used infrequently. In Enterprise Insight, assets can be owned by more than one group so a group can have partial ownership of an asset. The percentage of an asset that a group owns is determined by the allocation percentage of the financial responsibility of the asset claimed by the group.

The following fields are included:

- Group to which the asset is assigned
- Vendor from which the asset was purchased
- APPO # of the order on which the asset was purchased
- Location at which the asset is physically located
- Cost Center to which the asset is assigned
- Product DMI (Desktop Management Information name) of the asset
- Manufacturer part # of the asset
- Serial # of the asset
- Unit Cost of the asset
- Quantity of the asset
- Extended Payment on the asset

Expiring Leases Report

The Expiring Leases report identifies leases expiring in the next three months, the months remaining on those leases, and the leased assets. The report can be forwarded to IS personnel to help them plan for the return of leased assets to lessors in a timely fashion and avoid paying additional rent on those leased assets or to negotiate a lease renewal. The report includes subtotals, by cost center, of the combined unit rent and use tax. The report is sorted by cost center.

The following fields are included:

- Lease #
- Lease Schedule #
- Cost Center to which the asset is charged
- Commencement Date of the Lease

- Original Expiration Date of the Lease
- Lease Duration
- Number of Months Remaining Until the Lease Expires
- Serial Number of the Leased Items
- Unit Rent of the Leased Items
- Use Rate Tax of the Leased Items
- Total Unit Rent and Use Rate Tax of the Leased Items

Inventory Audit Report

The Inventory Audit report provides details for every asset in inventory. The report is organized by group and then by location. Product, manufacturer, version, asset id, serial number, fixed asset number, equipment user, quantity, category, status, grade, and unit cost are included in this report.

The following fields are included:

- Group to which the asset belongs
- The location where the asset can be found
- Product DMI (Desktop Management Information name) of the asset
- Enterprise Insight ID of the asset
- Serial number of the asset
- Fixed Asset Tag # of the asset
- Equipment user to whom the asset is assigned
- Quantity of the asset
- Product category of the asset
- Acquisition status of the asset, whether purchased or leased
- Grade of the asset
- Unit Cost of the asset

IT Expenditure Report

The purpose of the IT Expenditures report is to provide the Asset Manager with a global view of the costs of all purchased and leased equipment as well as a detailed report of IT expenditures during a specified time period. The report is sorted by the main product category (hardware or software) and then by group. The report includes subtotals by group and category for unit cost, asset tax amount, asset ship amount and asset discount amount for each asset.

The following fields are included:

- Product category of the asset
- Group to which the asset is assigned
- Enterprise Insight ID # of the asset
- Product DMI (Desktop Management Information name) of the asset
- The acquisition status of the asset (whether the asset is Purchased or Leased)
- Unit Cost of the asset
- Tax Amount paid on the asset
- Ship Amount paid on the asset
- Discount Amount on the asset

Leased Equipment by Lease Expiration Report

The Leased Equipment By Lease Expiration report identifies, on a month-by-month basis, leased assets and their original expiration dates. The report can be forwarded to IS personnel to help them return leased assets to lessors in a timely fashion. The report includes subtotals by location and group of quantity, unit rent and extended rent. The report is sorted by group, location, and original expiration date.

The following fields are included:

- Group to which the asset is leased
- Location at which the asset is located
- Lessee Notice Date on the lease
- Actual Expiration/ Buy out Date of the Item
- Status
- Lessor
- Lease #
- Lease Schedule
- Product Name of the Leased Item
- Quantity of the Leased Item
- Manufacturer Part Number of the Leased Item
- Serial Number of the Leased Item
- Unit Rent of the Leased Item

New Leases Report

The New Leases report identifies new leases that have commenced in the previous month. The assets associated with these new leases are identified by serial number. The report can be forwarded to purchasing or corporate accounting to notify them of the monetary commitment on those leases. The report includes total rent, which is the combined unit rent and use tax. The report is sorted by cost center.

The following fields are included:

- Lease #
- Lease Schedule #
- Cost Center to which the asset is charged
- Commencement Date of the Lease
- Original Expiration Date of the Lease
- Lease Duration
- Serial Number of the Leased Items
- Unit Rent of the Leased Items
- Use Rate Tax of the Leased Items
- Total Unit Rent and Use Rate Tax of the Leased Items

Outstanding Orders Report

The purpose of the Outstanding Orders report is to provide a comprehensive, detailed list of all orders that have not been received, rejected or cancelled. The report is sorted by group

The following fields are included:

- Order # from the order document
- Status of the order

- Next Reviewer on the order document
- Product DMI (Desktop Management Information name) for each product ordered
- Quantity of each product ordered
- Group for which the products were ordered

Person Report

The Person Report helps the system administrator monitor, and maintain, a comprehensive list of people in an organization who are entered in Enterprise Insight's database for asset management purposes. The report lists the login name, last name, email address and unique ID as it was entered in Enterprise Insight's Person editor. The listing is sorted by group, reviewer status and location

The following fields are included:

- Group to which the person belongs
- Whether or not the person is a reviewer for the group
- Location of the person
- Login Id of the person as it was entered in the Person Editor
- Last name of the person
- Email address of the person

Product Catalog Report

The Product Catalog report provides detailed information about the products entered in Enterprise Insight's product catalog. The information is grouped by category, manufacturer and contains product, version and part number information.

The following fields are included:

- Category of the product
- Manufacturer (Mfg) of the product
- Product DMI (Desktop Management Information name for the product)
- Version of the product
- Manufacturer Part # of the product

Sale or Retirement Report

The Sale or Retirement report provides the asset manager with a complete report of all assets that have been disposed of from inventory, either by sale or retirement, and the details of all sale agreements. The report is sorted by group, sale date and customer. Subtotals for quantity, unit price and extended price are also displayed

The following fields are included:

- Group that sold the asset
- Date of the sale
- Extended Price paid for the asset
- Sale # on the agreement
- Customer that bought the asset
- Product category of the asset
- Product DMI (Desktop Management Information name) of the asset
- Status of the asset

Security Reports

Two Security Reports are included—Security Group and Security Role. The reports help the system administrator monitor and maintain security in Enterprise Insight. The Security Group Report lists each security group and the users assigned to it. The Security Role Report lists each security role and the functions included with it.

The following fields are included:

- Security Group name
- Security Role name
- Security Function name
- The name of the Enterprise Insight user as it was entered in Enterprise Insight's Person Editor

Service Level Agreement Report

The Service Level Agreement report measures the time taken from receipt of IT equipment from a vendor until the equipment is installed on an end user's desk. The report allows IT Management to analyze internal or external service level agreements and ensure compliance by external service providers, as well as measure internal performance of their own desktop management services.

The following fields are included:

- Group to which the asset belongs
- Days from receipt of the asset to installation
- Product DMI (Desktop Management Information name) of the asset
- Quantity of the asset
- Received Date of the asset
- Installation Date of the asset

Software License Compliance Report

The Software License Compliance Report tracks software license agreements listing the license quantity per agreement as well as which licenses are installed and which are idle.

The following fields are included:

- Group to which the software license is assigned
- Supplier, either the software manufacturer or a vendor
- Software License Agreement number
- Product DMI (Desktop Management Information name for the product)
- Actual Expiration Date of the software license
- Installed Quantity of the software
- Idle Quantity of the software
- Commencement Date of the software license

Standard Configuration Report

The Standard Configuration report lists the details of all standard configurations established by your organization, by name and description. Standard configurations are products that your company groups together in the catalog to standardize the procurement of equipment, and asset management, at your company. Product, manufacturer, version, part # and quantity are included.

The following fields are included:

- Name of the standard configuration as it was entered in Enterprise Insight
- Description entered for the standard configuration
- Product DMI (Desktop Management Information name for the product) for each product included as part of a standard configuration
- Manufacturer's Part # for each product included as part of a standard configuration

Standard Maintenance Expiration Report

The Standard Maintenance Expiration report provides up-to-date information on all maintenance agreements on a month-by-month basis so you can monitor expiration dates. The report reminds you to provide notice of termination or renewal in order to avoid costly month-to-month charges or maintenance on unused assets.

The following fields are included:

- Group with whom the maintenance agreement was signed
- Provider associated with each maintenance agreement
- Schedule associated with the maintenance agreement
- Maintenance #
- Product DMI (Desktop Management Information name) of each asset on the agreement
- Quantity of each asset on the agreement
- Expiration date of the maintenance agreement
- Commencement date of the maintenance agreement
- Notice Due date of the maintenance agreement
- Unit Cost for each asset on the agreement
- Total quantity of all assets on all maintenance agreements

Volume Purchase Expiration Report

The Volume Purchase Expiration Report is used to track a company's purchasing commitments and their expiration dates, based on the commitment details entered in the Volume Purchase Agreement editor and items ordered in the Order editor. The report identifies and includes all ordered items that are linked to an VPA and compares what is ordered to the original commitment on the VPA.

The following fields are included:

- Volume Purchase Agreement number
- Commencement Date of the agreement
- Actual Expiration Date of the agreement
- Description entered for the agreement document
- Commitment Quantity under the terms of the agreement
- Commitment Amount under the terms of the agreement
- Total Quantity Ordered thus far under the agreement
- Quantity Liable For under the terms of the agreement, calculated by subtracting the quantity ordered from the Commitment Quantity
- Total Amount Ordered thus far under the agreement
- Amount Liable For under the terms of the agreement, calculated by subtracting the Total Amount Ordered from the Commitment Amount

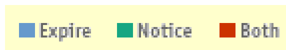
Chapter 15. Calendar

Using the Calendar

Calendar identifies notice and original expiration dates for leases, volume purchase agreements, maintenance agreements and software license agreements so there is no need to run a report or search through multiple contracts to identify these dates

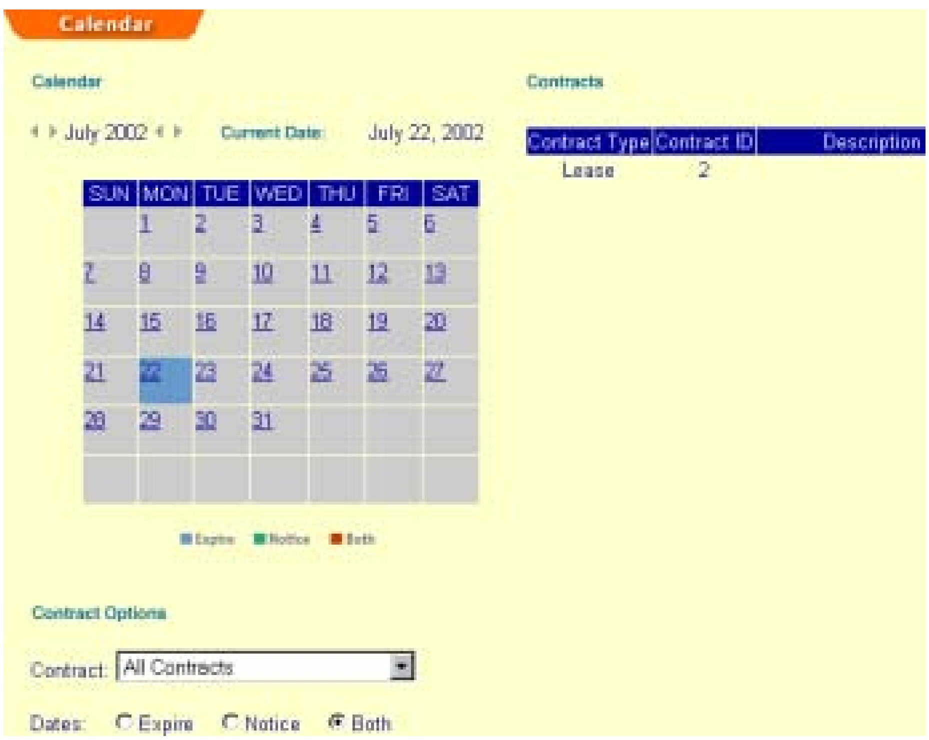
Enterprise Insight displays the contract type, contract ID and description (if provided) for leases, maintenance agreements, volume purchase agreements and software licenses.

On the calendar, expiration dates, which are stored in the Original Expiration Date field, display in blue. Notice dates, which are stored in the Lessee Notice Date field in Leases, and the Notice Date field in Maintenance Agreements, display in green. If both expiration and notice dates occur on a date, it displays in red.



To use the calendar:

1. Click **Calendar** on the navigation tool bar. The current month displays when the calendar opens and today's date is selected. To the left of the calendar is a list of the contracts, if any, with expiration and notice dates for the day displayed. The list includes the contract type, contract ID and description (if available).



2. Select the month to list critical dates for using the scroll tools at the top. The right arrows scroll by year; the arrows on the left side of the date by month.
3. Under Contract Options (below the calendar), select, from the drop-down menu, the contract type you want to display: All Contracts or one type.

4. Choose whether you want to display expiration dates or notice dates, or both, by clicking the appropriate Dates option.

5. In the calendar, click on the date that displays in blue, green or red to list contract information for that date.

6. Click on the name of a contract to open its record detail window to see its details.

7. If needed, you can edit the contract in its record detail window. Be sure to click **Save** once you've finished editing.