



Enterprise **INSIGHT**<sup>™</sup>

**Enterprise Insight<sup>™</sup> 3.0**

**Administrator's  
and Installation Guide**

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# Chapter 1. Overview

The Enterprise Insight Administrator's guide provides the information needed for an administrator to install, setup records, and maintain Enterprise Insight 3.0.

## System Requirements

Please review the system requirements before beginning Enterprise Insight installation. Requirements apply to both the database and web server (if not the same machine).

### Server Requirements

Processor	Minimum	Recommended
Manufacturer	Intel	Intel
Model	Pentium III	Pentium III
Processor Speed	500 MHz	800 MHz
<b>Operating System</b>		
Manufacturer	Microsoft	Microsoft
Name	Windows NT Server	Windows NT Server
Version	4.0	4.0
Service Packs	SP5	SP6a
<b>Memory (in MB)</b>		
RAM	128	256
Free hard drive space	800	800
<b>Software</b>		
	Microsoft Internet Information Server (IIS) version 4	
	Microsoft Index Server	
	Oracle or Oracle Net8 Client	
<b>Network Protocol</b>		
Type	TCP/IP	TCP/IP
<b>Email Protocol</b>		
	SMTP	SMTP

### Workstation Requirements

<b>Web Browser Requirements</b>		
Manufacturer	Microsoft	Microsoft
Name	<b>Internet Explorer</b>	<b>Internet Explorer</b>
Version	5.x	5.x

<b>Importer Requirements</b>	
Operating System	Microsoft 95/98, NT 4.0 or 2000 with the latest service pack
Processor	Pentium 266 or greater
RAM	Minimum of 64 MB, 128 MB recommended
Disk space	25 MB or greater free
Software	Oracle Net8 Client installed with TNSnames alias created
	Microsoft Excel 2000

**It is recommended that, for minimal maintenance effort and cost-effective set up, you install the database server and IIS server on the same Windows NT machine.**

Enterprise Insight uses a Microsoft-centric architecture with the optimal platform being Windows NT or Windows 2000. Enterprise Insight requires Microsoft Internet Information Server as the web server and uses Oracle as the database server.

# Chapter 2. Installation

## Database server setup

See System Requirements on page 5 before beginning any installation tasks to make sure the needed hardware and software is in place. Make sure you have **Windows NT 4.0 with SP 5 or higher; Oracle Net8 Client**, and **Microsoft Internet Information Server 4.0 or higher**.

**EINSIGHT** is the recommended value for the global database name

Install and tune Oracle 8i

To tune Oracle manually, follow these steps:

1. Determine the path for this file:  
`{ORACLE_HOME}\ADMIN\<SID>\PFILE\INIT.ORA`  
 Where {ORACLE HOME} is the Oracle base director and <SID> is the System Identifier for the Oracle Server.
2. Using an ASCII text editor, such as NOTEPAD, make the following changes to the file:  
`open_cursors = 1000`  
`processes = 400`
3. Save the edited file and close the text editor.
4. Restart Oracle Services using the Services Applet from the Control Panel. (Start → Settings → Control Panel → Services).

## Web server setup

1. Install Microsoft IIS 4.0 or higher (IIS does not have to reside on the same server as Oracle).

For Windows NT 4.0 systems, the option pack that contains IIS 4.0 can be downloaded from Microsoft's web site:

<http://www.microsoft.com/ntserver/nts/downloads/recommended/NT4OptPk/>

2. If Enterprise Insight is not installed on the same server as the Oracle database, it is necessary to install Oracle Net8 Client.
3. Next, add a database alias (Oracle Net8 Client must be installed):
  1. Open Net8 Configuration Assistant program by selecting:  
 Start → Programs → Oracle → Oracle8\_Home → Network Administration → Net8 Configuration Assistant
  2. Select Local Net Service Name configuration.
  3. Click Add to create a net service name.
  4. Select Oracle8i database or service.
  5. Enter the Service Name (global database name) for Enterprise Insight.

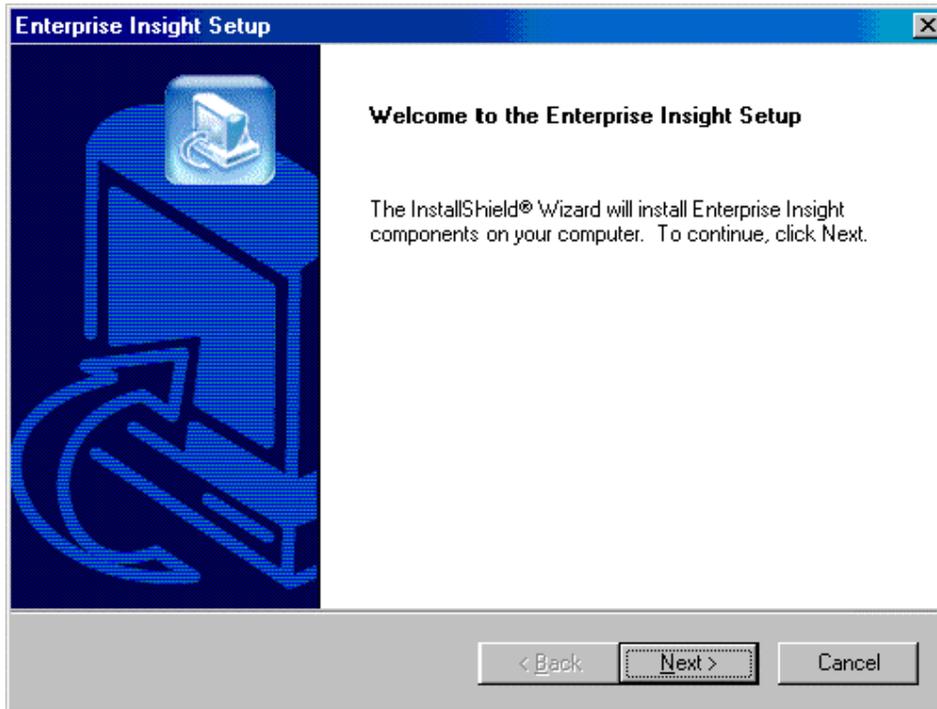
**EINSIGHT was the recommended value during the Oracle installation**

6. Choose the network protocol (normally TCP/IP) for a remote database connection.
7. Enter the host name and listening port of the Database server.
8. Select Yes. It is highly recommended to perform a test to verify the connection information you entered is correct.
9. For Net Service Name (TNSName Alias) enter EINSIGHT (the value entered in Step 5.)
10. Select No for another net service name and click Next to finish.

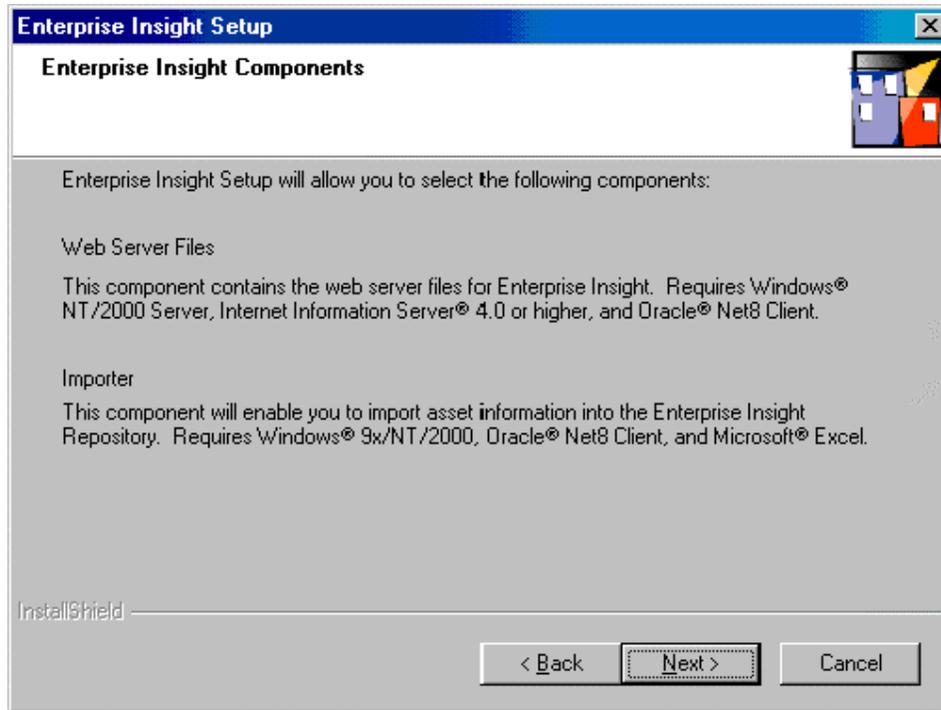
## Enterprise Insight installation

**You must be logged into your Windows NT or 2000 computer with administrative rights to install Enterprise Insight.**

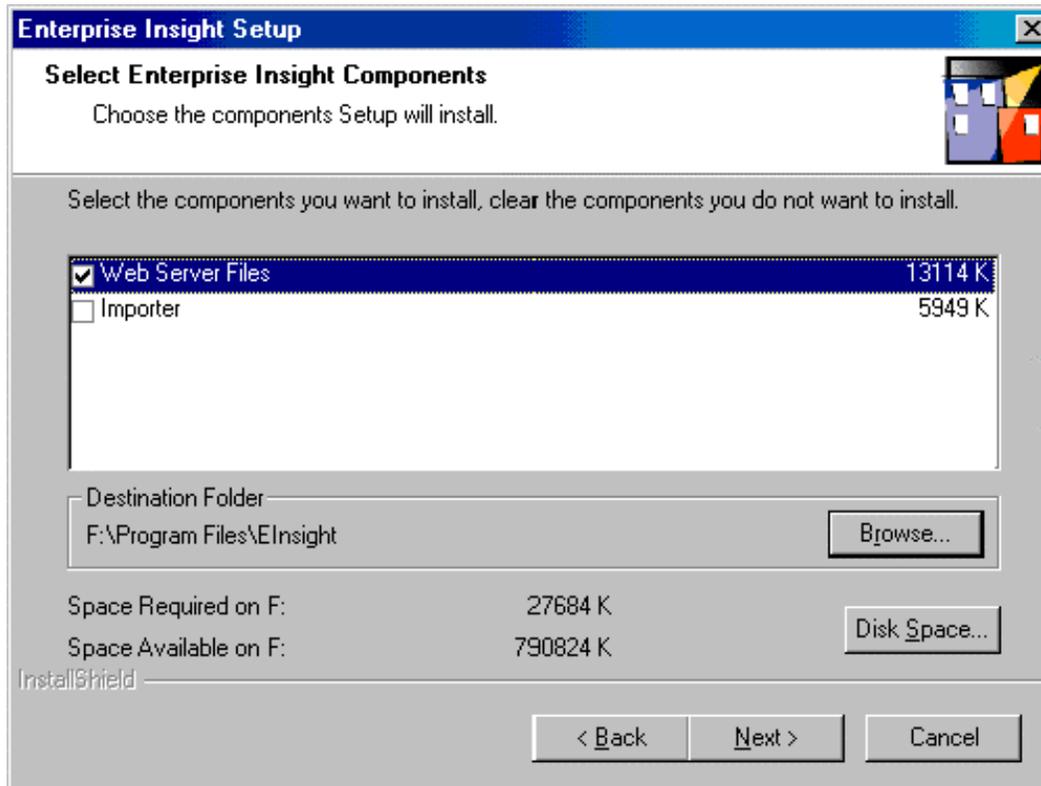
1. Place the Enterprise Insight CD in the CD-ROM drive of your web server.
2. If your computer's auto-play does not automatically start the CD, click on Start → Run and type d:\setup.exe (where d: is the label for your CD-ROM drive)
3. The InstallShield® Wizard launches with a welcome screen.



4. Click Next when done viewing the welcome screen. The **Enterprise Insight Components** screen appears.

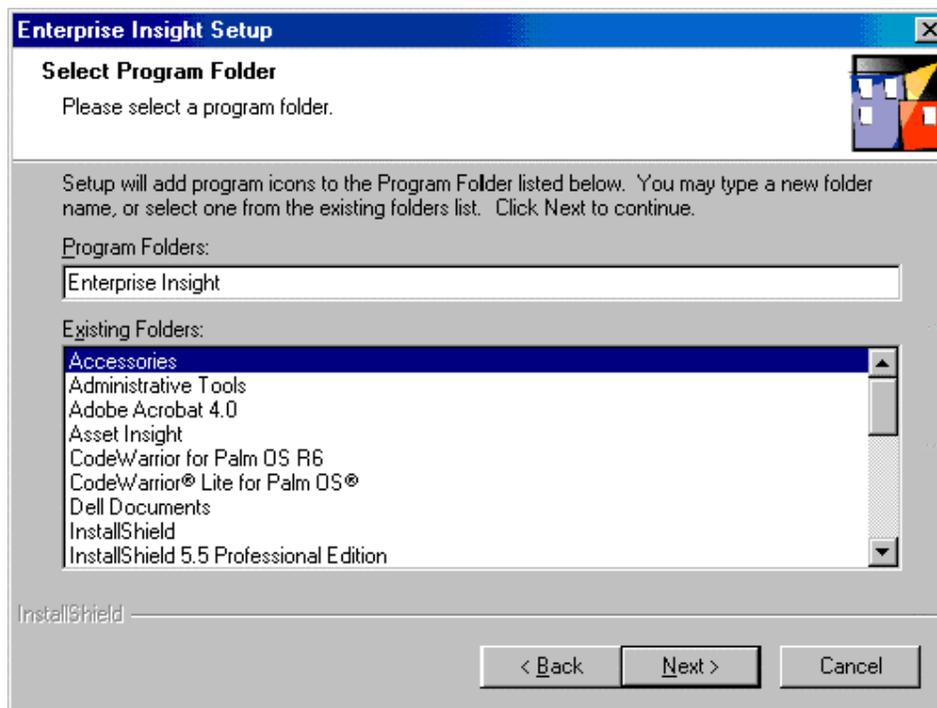


- When finished viewing this screen, click **Next**. The **Select Enterprise Insight Components** screen appears.

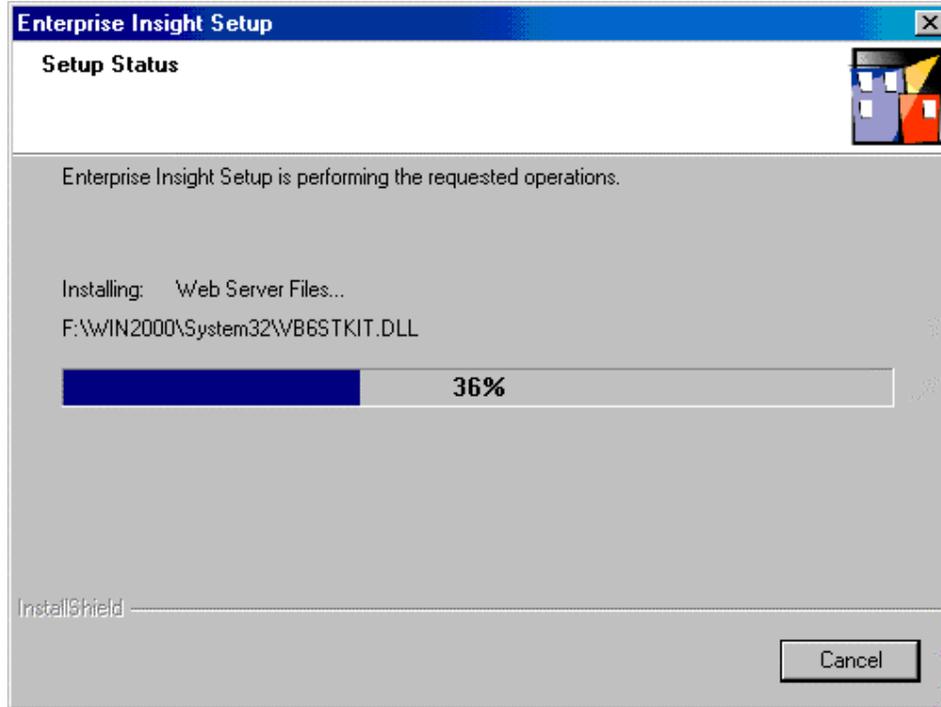


- Select **Web Server Files** and click **Next**.

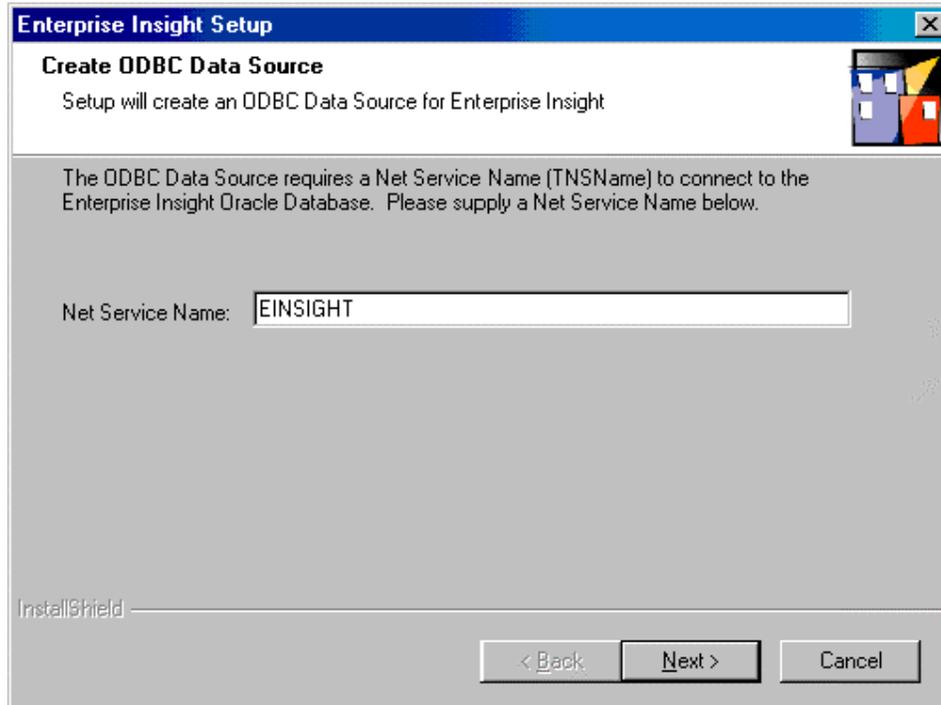
7. If the default destination folder is not desired, click **Browse** and select the folder to copy the files into.
8. Click **Disk Space** to see what disk space is available on local drives. This is only necessary if the default drive selected does not have enough space.
9. Click **Next**. The **Select Program Folder** screen appears.



10. Shortcuts for **Login**, **Enterprise Insight Help**, **Admin Guide**, **User's Guide**, and **Configuration** will be placed in your **Start** folder.
11. Click **Next**. Enterprise Insight will begin installing the web server files and a confirmation screen appears.

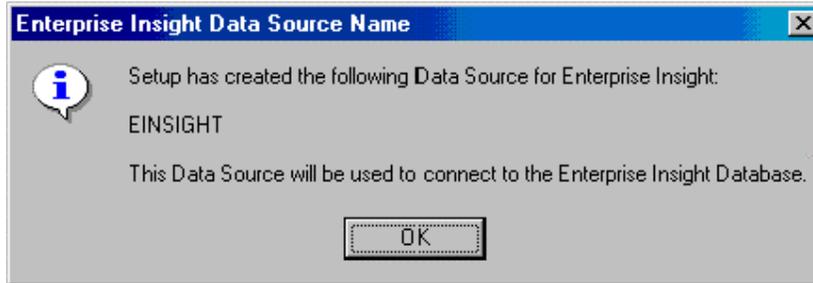


12. Immediately after Enterprise Insight has finished installing files, it will create the EI virtual directory. For NT 4.0 servers, setup will restart Internet Information Server before continuing to the next step. One or more screens will appear briefly on your screen.
13. Once the program has finished installing files and creating the EI virtual directory, the program begins the database configuration where the ODBC administrator and OpenLink are installed, and the system data source is created. The **Create an ODBC Data Source Name** screen appears.

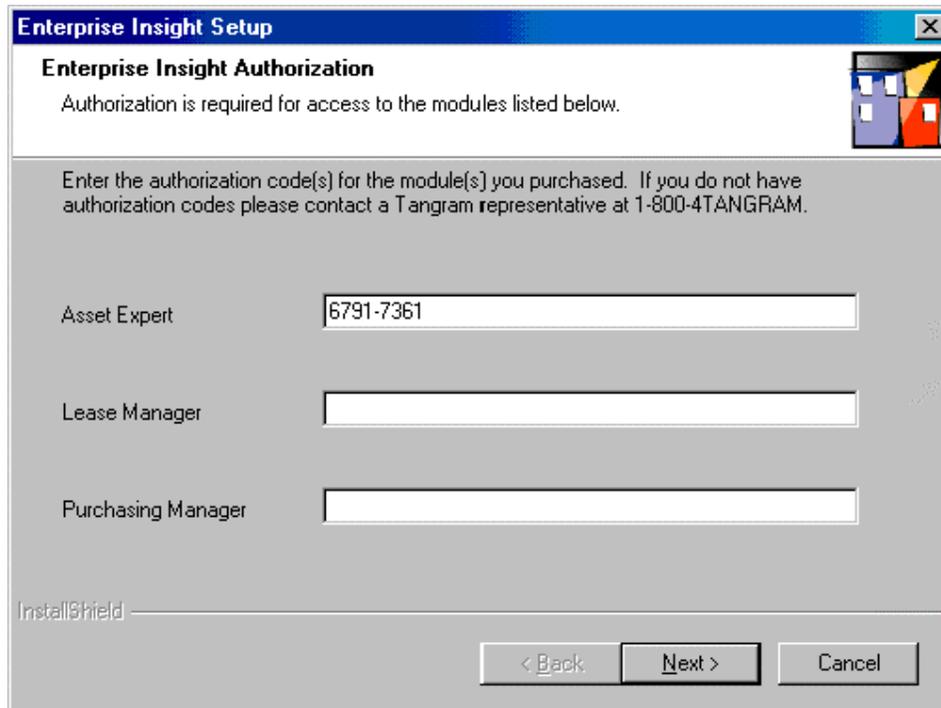


14. Type your Net Service Name as created in **Web server setup** on page 7.

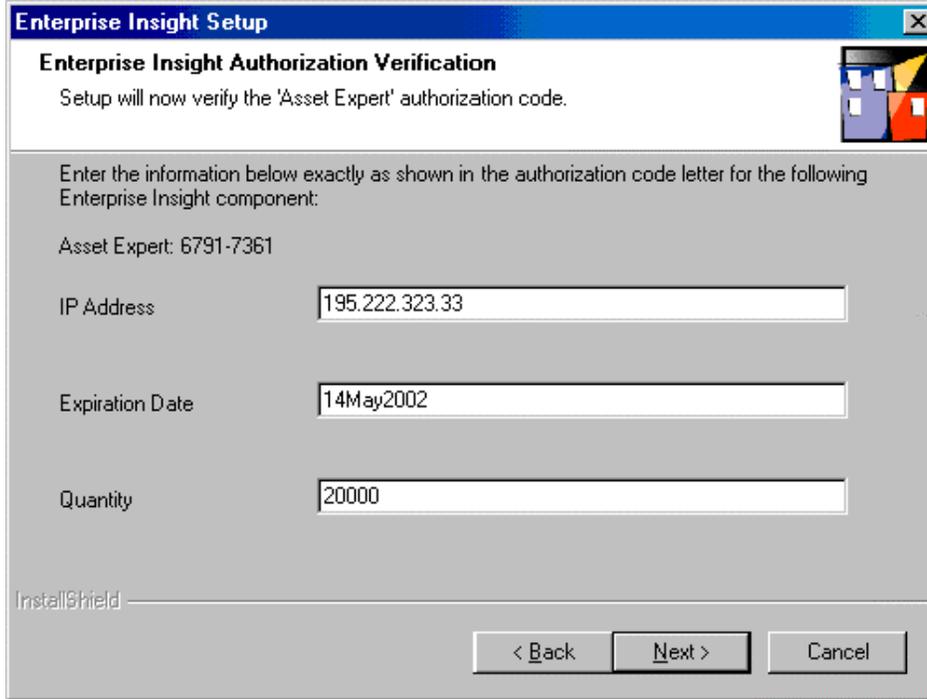
15. **Click Next.** A confirmation screen appears.



16. Next, you will be prompted for your **Authorization Codes** provided to you by Tangram Enterprise Solutions. Depending on options chosen when you purchased Enterprise Insight, you will have up to three: for Asset Expert, Lease Manager and/or Purchasing Manager. If you do not have these codes, you must contact a Tangram representative. Call 1-800-4TANGRAM to obtain your codes.



17. The next one to three screens (depending on what authorization codes you've entered) will verify the authorization codes for the selected components.



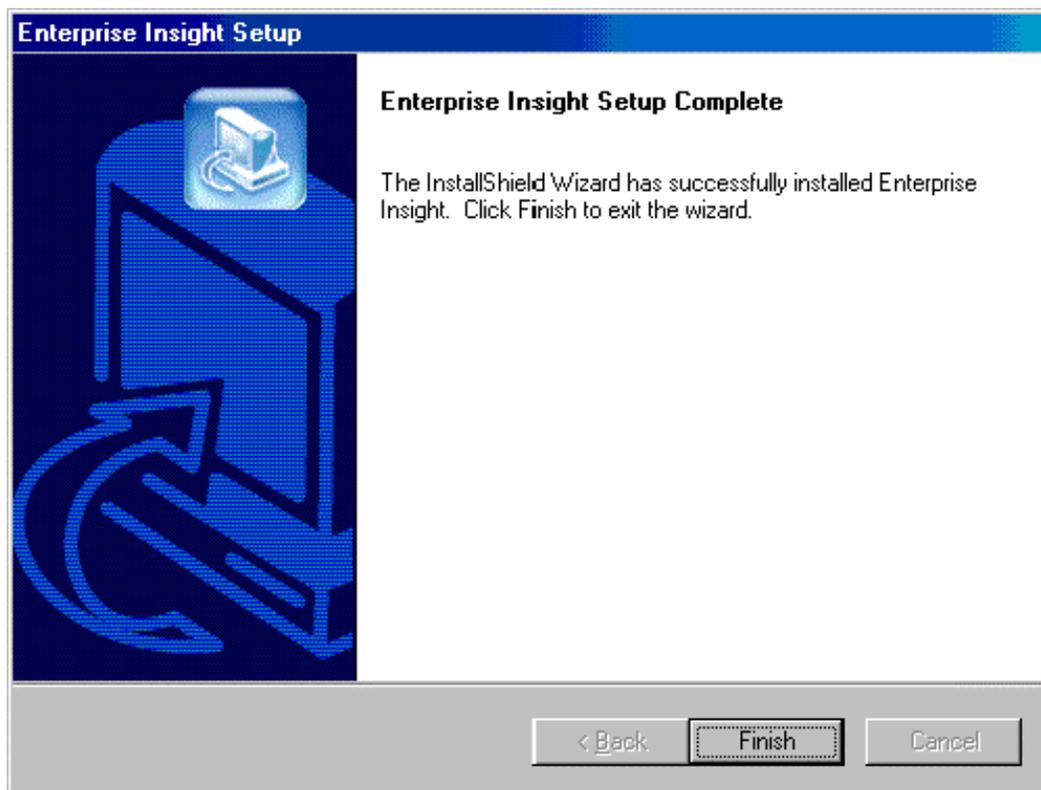
18. In each of the three screens, you will be prompted to enter information supplied with its particular code. In the example above, for Asset Expert, you are prompted to type in the **IP Address**, **Expiration Date**, and **Quantity**.

Be sure to enter the information EXACTLY as shown in your authorization code letter.

19. When you've completed entering the information, click **Next**.
20. Each of the three screens will also provide a confirmation of your information when you complete entering the required information.



21. Click **OK** to close these screens. These authorization codes are inserted into the database script by the setup procedure.
22. Once authorization is complete, you will receive a message that installation is complete.
23. Click **Finish** to complete installation.



## Enterprise Insight post-installation

The steps to run database scripts **MUST BE** performed from the DOS command line SQLPlus utility.

1. To run the database scripts:

At a command prompt, change to the database scripts directory. The default is:

```
cd <drive:>\Program Files\EInsight\SQL\
```

2. At the c:> prompt, type **sqlplus**

3. Connect to the Oracle database.

If the Oracle database is on the local computer, type:

```
SQL:> connect SYS/<passwd>
```

If the Oracle database is on a remote computer, type:

```
SQL:> connect SYS/<passwd>@<TNSName>
```

where TNSName is the alias to the Enterprise Insight database

(EINSIGHT is the default).

#### 4. Run the database scripts by entering at the SQL> prompt:

```
start CreateTableSpaceAndUser.sql
start EiInit.sql
```

**Note:** If the Database is on a remote computer you will need to edit the connect statement in **EiInit.sql** before running the script.

Change

```
connect insight/einsight
to
connect insight/einsight@<TNSName>
where TNSName is the alias to the Enterprise Insight Database
```

## Importer workstation setup

See System Requirements on page 5 before beginning any installation tasks to make sure the needed hardware and software is in place. Make sure you have **Windows 95/98/NT/2000 with the latest service pack; Oracle Net8 Client, and Microsoft Excel 2000 or higher.**

**EINSIGHT is the recommended value for the global database name**

1. Install Microsoft Excel 2000 or higher if not already on the workstation.
2. Install and tune Oracle 8i Client.
3. Add a database alias (Oracle Net8 Client must be installed):
  1. Open Net8 Configuration Assistant program by selecting:  
Start → Programs → Oracle → Oracle8\_Home → Network Administration → Net8 Configuration Assistant
  2. Select Local Net Service Name configuration.
  3. Click Add to create a net service name.
  4. Select Oracle8i database or service.
  5. Enter the Service Name (global database name) for Enterprise Insight.

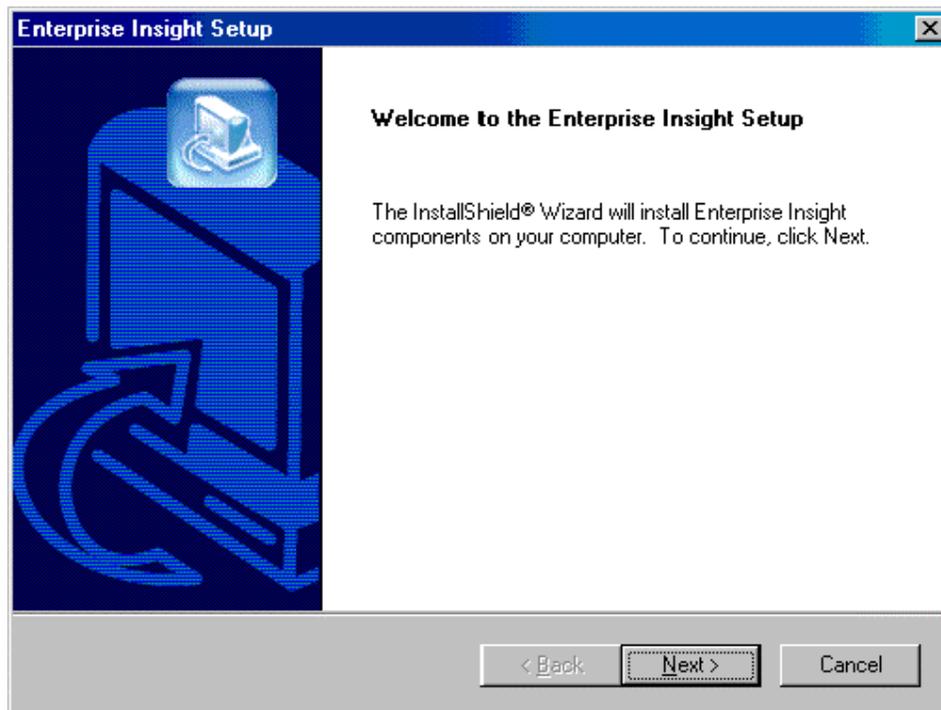
**EINSIGHT was the recommended value during the Oracle installation**

6. Choose the network protocol (normally TCP/IP) for a remote database connection.
7. Enter the host name and listening port of the Database server.
8. Select Yes. It is highly recommended to perform a test to verify the connection information you entered is correct.
9. For Net Service Name (TNSName Alias) enter EINSIGHT (the value entered in Step 5.)
10. Select No for another net service name and click Next to finish.

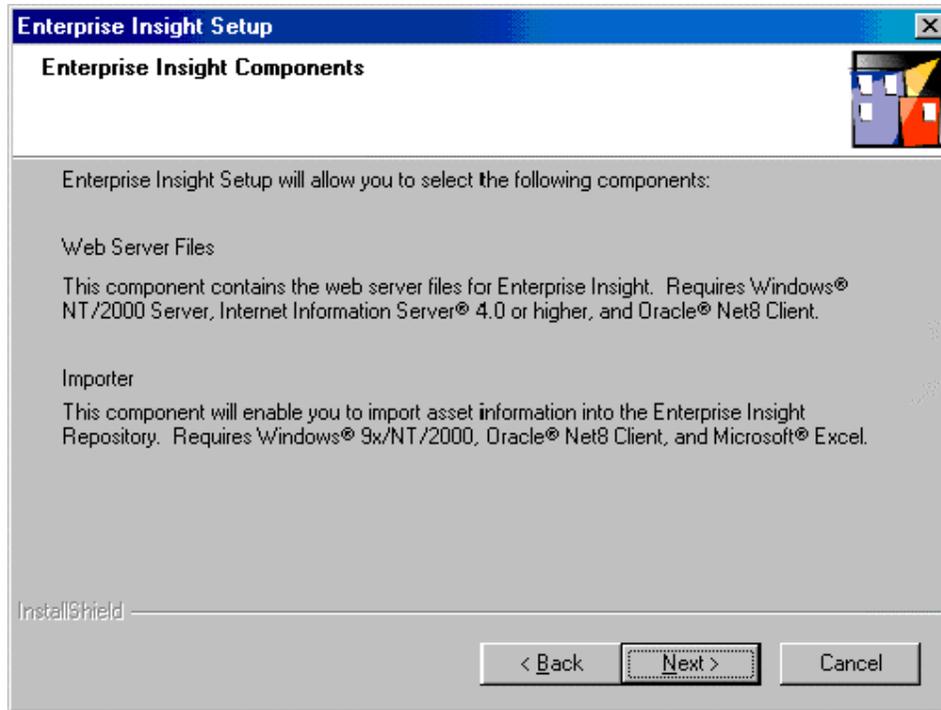
## Importer installation

**You must be logged into the Windows NT or 2000 computer with administrative rights to install Enterprise Insight.**

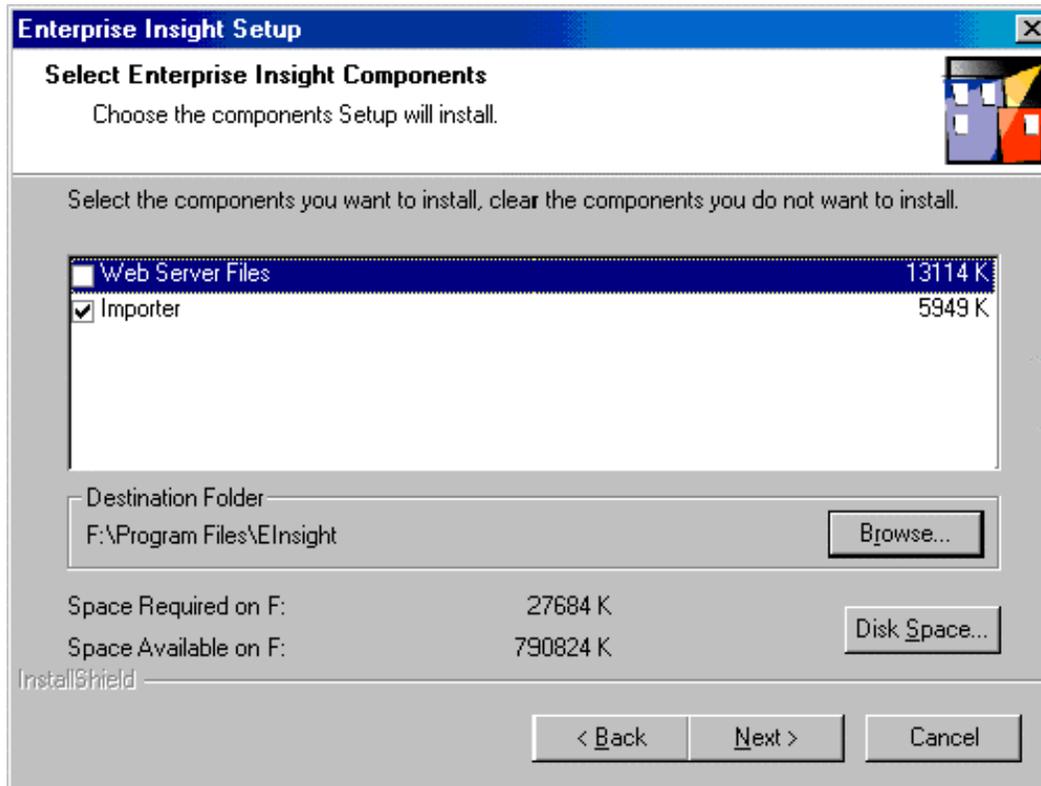
1. Place the Enterprise Insight CD in the CD-ROM drive of your user's workstation.
2. If the computer's auto-play does not automatically start the CD, click on Start → Run and type d:\setup.exe (where d: is the label for your CD-ROM drive)
3. The InstallShield® Wizard launches with a welcome screen.



4. Click Next when done viewing the welcome screen. The **Enterprise Insight Components** screen appears.

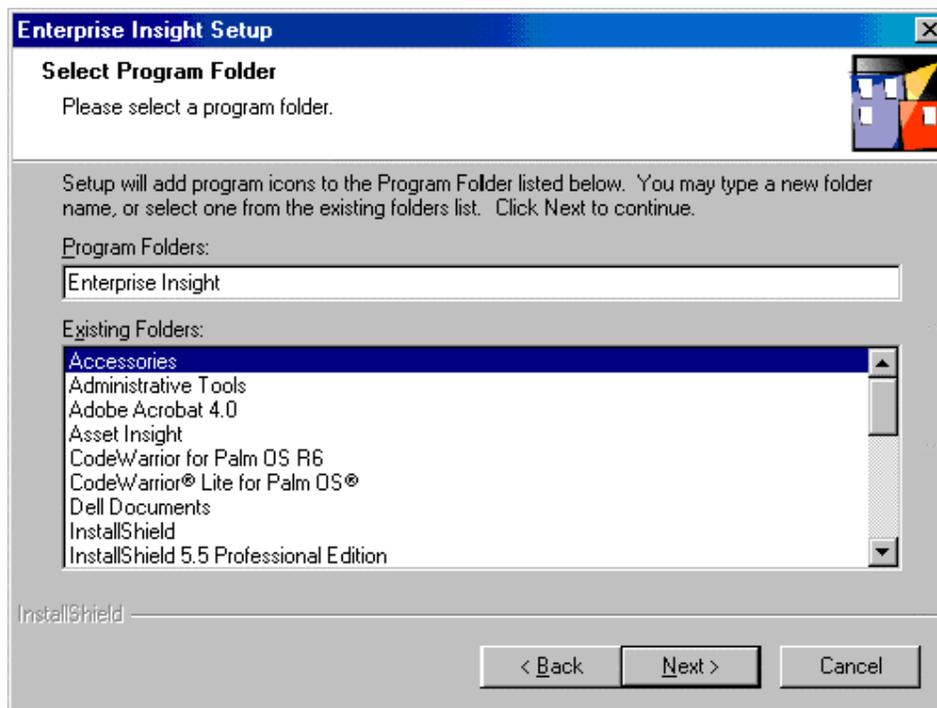


5. When finished viewing this screen, click **Next**. The **Select Enterprise Insight Components** screen appears.

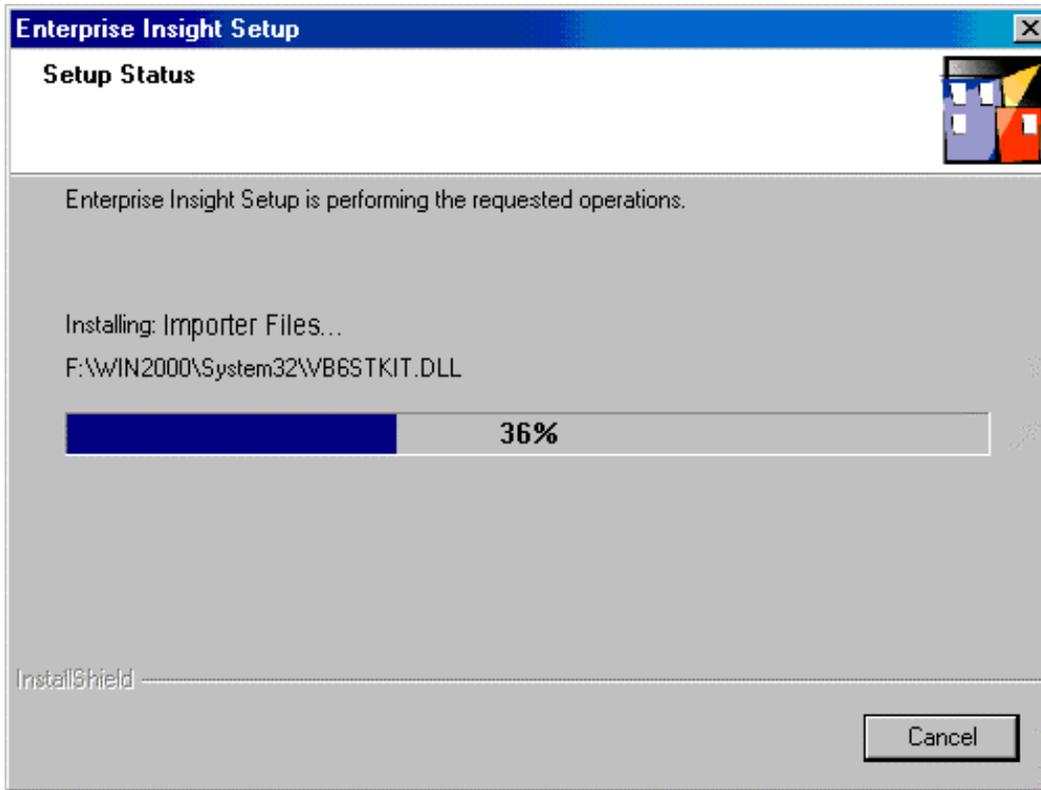


6. Select **Importer** and click **Next**.

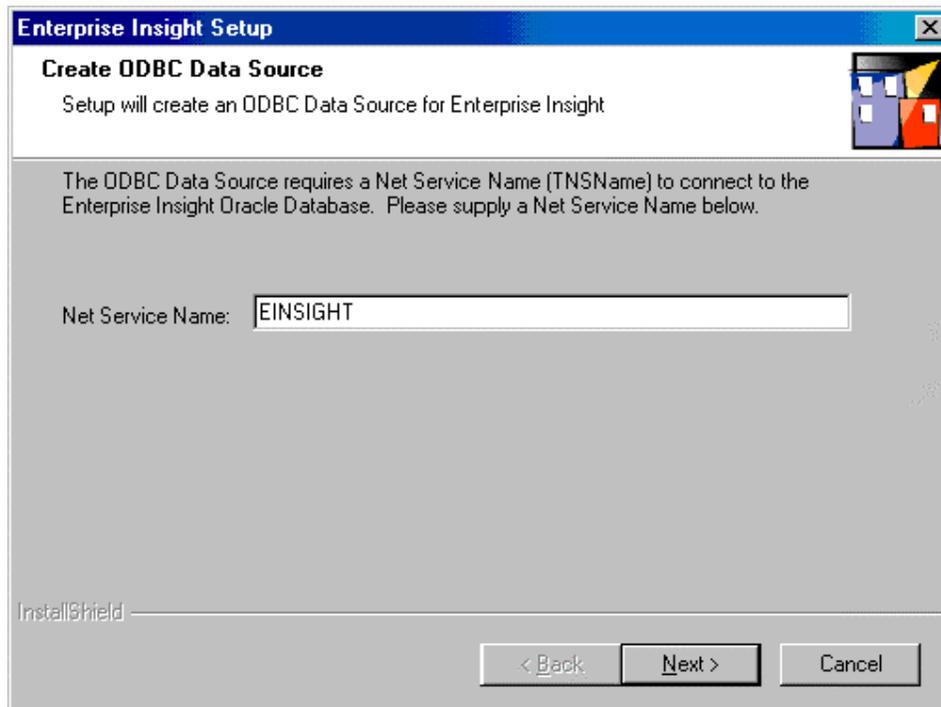
7. If the default destination folder is not desired, click **Browse** and select the folder to copy the files into.
8. If **Space Available** Click **Disk Space** to see disk space available on local drives. This is only necessary if the default drive selected does not have enough space.
9. Click **Next**. The **Select Program Folder** screen appears.



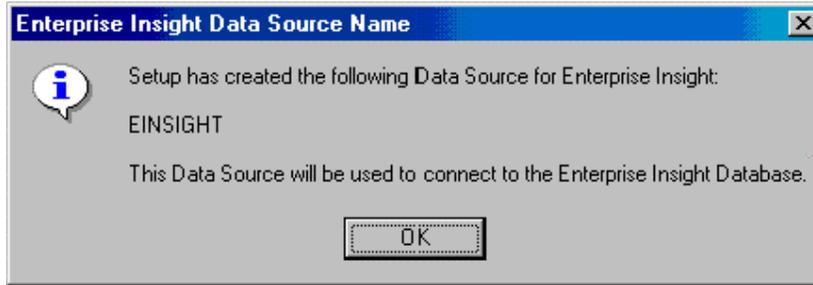
10. Shortcuts for **Admin Guide**, **User's Guide**, **Configuration**, **Importer** and **Importer Help** will be placed in your **Start** folder.
11. Click **Next**. Enterprise Insight will begin installing the Importer files and a confirmation screen appears.



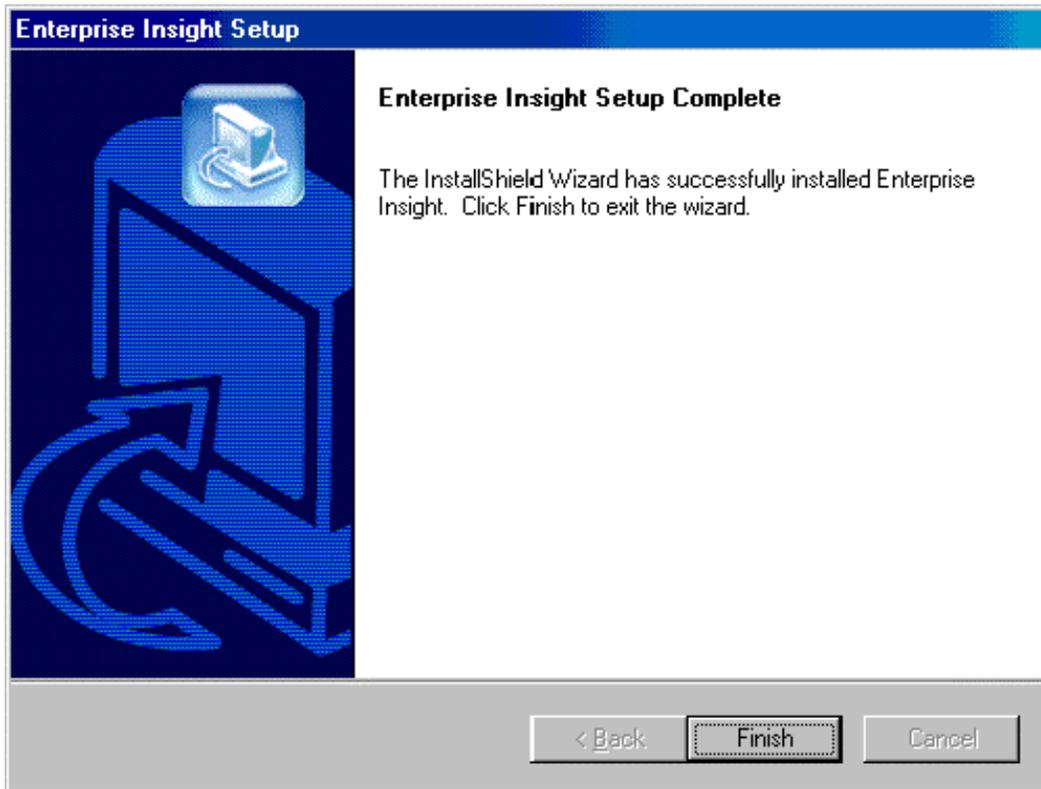
12. Once the program has finished installing Importer files, the program begins the database configuration where the ODBC administrator and OpenLink are installed, and the system data source is created. The **Create an ODBC Data Source Name** screen appears.



13. Type your Net Service Name as created in **Importer workstation setup** on page 15.
14. **Click Next.** A confirmation screen appears.



15. Click **Finish** to end the installation wizard.

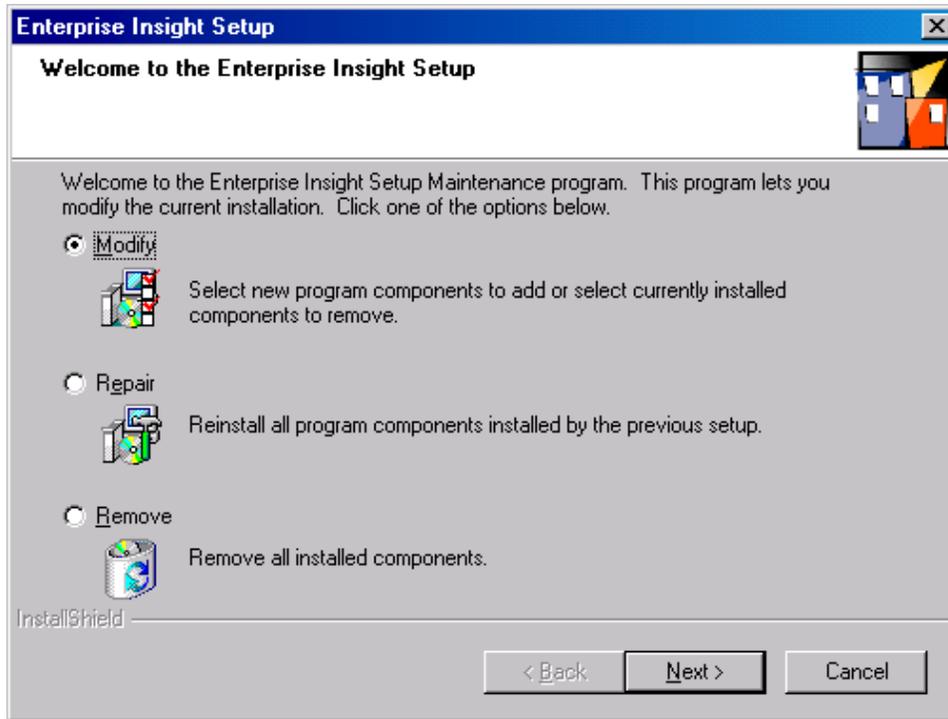


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## Modify, Repair, Remove

If, at any point, you want to modify (such as adding Importer on the web server where EI resides), repair or remove components of Enterprise Insight, you can insert the Enterprise Insight CD in your CD-ROM.

The InstallShield® Wizard automatically detects Enterprise Insight on your computer and gives you the options to **Modify, Repair** or **Remove**.



## Chapter 3. Settings

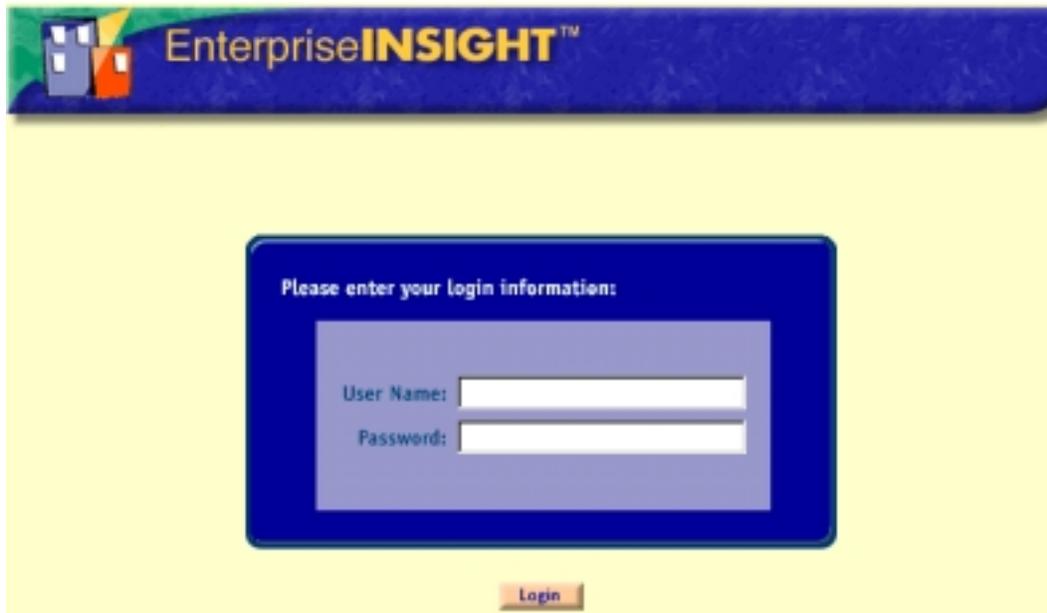
Once Enterprise Insight has been installed, the administrator needs to set up the records for organizational information, create users and groups, set up the access for users and groups, specify the system-wide preferences and set up the product catalog. These tasks are accomplished under **Settings**.

First, log in to Enterprise Insight.

Click **Start** → **Program Files** → **Enterprise Insight** → **Login**.

Default login: **einsight**  
Default password: **einsight**

Enter your user name and password where prompted, then click **Login**.



Note: Any field name displayed in **red** when creating records of any sort in Enterprise Insight is required. If a required field is not completed, you will not be able to save the record.

Settings

- Global Search Results Settings
- Global System Settings
- Update License Key
- Update Preferences
- Security Settings
- Add Custom Field
- Change Password
- About Insight

Select one option below and click "Setup."

Catalog Setup

General Setup

Reference

Setup

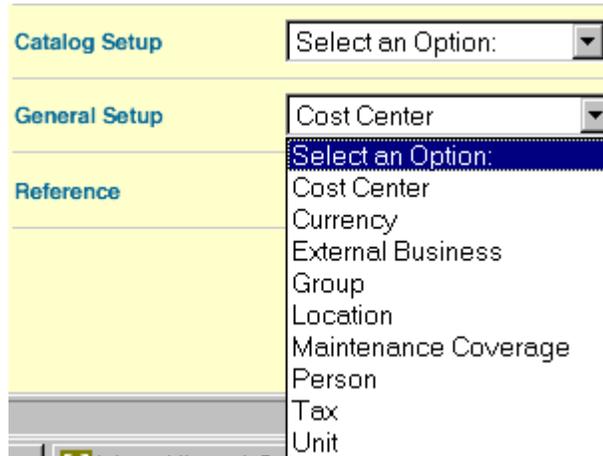
To set up records in Enterprise Insight, click on **Settings** from the navigation toolbar, and select the record under **Catalog Setup**, **General Setup**, or **Reference**.

Click **Setup**. A record detail window will appear. Use the textboxes, drop-down lists and lookup  buttons to fill in the appropriate information.

Click **Save**. You must click **Save** after entering data for it to be written to the database.

The available records under each of the three categories are described in detail below. This information is also available in the online help for Enterprise Insight.

## General Setup



Use **General Setup** to enter and organize names, categories and characteristics of items unique or specific to your business, like people, groups and locations. The following are records available for set up under **General**:

**Cost Center:** (“Default” is the default.) Use Cost Center to view the hierarchal tree and to enter and modify cost centers, which are codes assigned by your organization that also may be associated with budgets. You can create and organize cost centers down to the level at which you want to track the costs associated with assets.

In Enterprise Insight, an organization has one top level cost center, with all others organized below it. You can create additional cost centers, enter their descriptions, associated budget, and specify their hierarchy. Each cost center can have multiple cost centers within it; but each cost center can have only one designated parent cost center.

**Currency** (USD is the default): Use the Currency options to enter and modify information about currencies used by Enterprise Insight. You can specify the default currency and conversion rate between the default and other currencies to establish the conversion rates among countries in which you have assets located. This facilitates proper reporting when moving equipment among countries, or when buying in one country for shipment to another. A currency must be selected for all Enterprise Insight contracts and items that have monetary amounts – for example, a lease, an order and an asset.

You can also use the Currency links to modify conversion information and change the default currency. If you want to determine the default currency in Enterprise Insight, use the Search function for Currency, and check the Default box before clicking the Search button. Only the default currency will display on the results page.

**External Business:** Use the External Business options to view the hierarchal tree and to enter and modify information about organizational units that are outside your company. External businesses may be vendors, lessors, lessees, customers, and maintenance providers; and identified as remit to, bill to, or ship to organizations. Once you set up external businesses, Enterprise Insight users will see and select the names of external businesses in various Enterprise Insight windows.

**Group:** (“Default group” is the default). Use the Group options to view the hierarchal tree and to enter and modify groups, which can be any organizational unit within your company. Groups within organizations can have different structures – for example, your company may be organized into divisions, which in turn are organized into plants. Or it may be organized into operating units, offices, and departments. Enterprise Insight is flexible enough to accommodate any organizational structure. You should set up and organize groups in Enterprise Insight to match your company’s organizational structure.

You can define the top-level group within your organization and give it a name – for example, Corporate. You can then create additional groups, enter their information, and specify their organization with the group links. Each group can have multiple groups within it; conversely, each group can belong to only one group.

**Location:** (“Default location” is the default.) Use the Location options to view the hierarchal tree and to enter and modify locations at which you want to track assets. Locations are places where assets are located; where they are being either stored or used. Any site within your company—a country, state, city, building, floor, department or office—can be defined as a location in Enterprise Insight. Locations can also be at other companies, where assets are located because they are being repaired.

The highest location is based on the organization’s, and assets’, physical and geographical locations. For example, the highest level location may be North America, with Texas and Oregon below it and buildings in several cities below these. You can create additional locations, enter their physical information, and specify their hierarchy. Each location can have multiple locations within it; conversely, each location can have only one designated parent location.

You must enter a location’s name; however, you can also optionally enter a physical/mailling address, email address, phone and fax numbers. You must also enter its tax code, which determines the tax rate for equipment at that location. Online help has more information about setting up tax codes if you’ve not already done so. A tax code entry is required for all locations so that taxes can be calculated for all assets at that location. If you create a location – for example, North America – at the top of your Location tree, then you should assign it a tax code entry that you created. You can create one and give it a tax rate of 0.00.

**Maintenance Coverage:** Use the Maintenance Coverage options to enter and modify policy information set by each maintenance provider. The names and information about maintenance coverage policies must be entered so that they are available for selection when you create a standard or enterprise maintenance agreement. You can define the days, hours and mileage that are covered under the maintenance policy.

**Person:** Use the Person options to enter and modify people. Anyone in your organization who uses Enterprise Insight, or who uses or requests equipment, must be entered and the Equipment User box must be checked during setup.

A person falls into one or more of the following categories:

**Enterprise Insight User:** someone who logs into and uses Enterprise Insight.

**Equipment User:** someone at your company who uses or requests equipment. This box must be checked for everyone you setup.

**Contact:** someone at your company who can provide details and answer questions about documents, equipment or assets. Contacts are automatically added to a group’s contacts list if the group is also entered.

**Reviewer:** someone at your company who is an Enterprise Insight User and also reviews and approves requests and orders for equipment.

Contact information about people outside your organization is not entered with the Person links. Use the **External Business** option to enter contact information about people outside your organization.

**Tax:** (“Default tax” is the default.) Use the Tax options to view the hierarchal tree and to enter and modify tax codes, which record details for taxing authorities such as cities, counties, provinces and countries. When you create a tax code, you must assign it a code and a name; other details are optional. The sum of all applicable tax codes determines the tax rate for equipment at a location. Since multiple authorities can levy taxes on an asset, you will need to establish a hierarchical relationship among tax codes as you set them up. Enterprise Insight sums tax codes up to the parent of each branch of the tax tree. For example, a computer in your location may be subject to a city tax, county tax and state tax. The label PPT indicates that the taxing authority collects personal property tax. A taxing authority may levy different taxes on the purchase or sale of an asset than on the leasing of an asset. In addition, there may be

different tax rates for different product tax categories in countries where taxation is defined by commodity, for example Value Added Tax (VAT) in common market countries.

**General Setup** objects must be entered in a specific order to accommodate the prerequisites of each object. The entry order is Tax, Cost Center, Location, Group, Person and External Business.

## Catalog Setup



Use the **Catalog Setup** options to set up product categories, tax categories, manufacturers, and residual sources. Once you have these entered, you can add products to the catalog and create standard configurations. Assets can be created and ordered after the product catalog is setup. The following are records available for set up under **Catalog**.

**Category:** Use the Category options to view the hierarchal tree and to enter and modify the categories in which you want to group products in the catalog and track assets. Any category you want to use for reporting purposes—a server, workstation, PC, printer or software—can be defined as a product category in Enterprise Insight.

The highest category in Enterprise Insight is predefined as **All Categories**. Beneath this category are two predefined main categories—Software and Hardware. You can create multiple levels of categories beneath these. For example, the next level category under Hardware may be Computer, with Server and PC below it. You can create additional categories in the All Categories, Hardware and Software categories, and specify their hierarchy. Each category can have multiple categories within it; conversely, each category can have only one designated parent category.

You must enter a category's name; however, you can also optionally enter a description to help you clarify the name.

**Manufacturer:** Use the Manufacturer options to enter and modify the names of manufacturers to use when defining product and assets, to ensure that the names are standardized. Once you enter manufacturer names, users can select them, and Enterprise Insight displays them in the Manufacturer field. You can also enter descriptions for manufacturers, to help you identify them.

**Product:** Use the Product options to enter and modify products in Enterprise Insight. Products must be in the catalog before they can be ordered or added as assets. Both Category and Manufacturer are prerequisite values and, if they don't already exist, must be entered before you can enter new products. New products can be added to the catalog and marked as Temporary if you do not have a part # or until they are approved. While they are Temporary they can be included on procurement documents but cannot be ordered. Once an item is approved and the Temporary box is unchecked, it can be ordered. If the product is to be kept in the catalog and ordered, the Temporary check mark has to be removed manually.

In the Assembly section, you can specify other products that are components of the product you are creating. All of the components are individual products that you could order individually. For example, you may choose to order a Compaq Presario 5200 part number from your supplier that is just the CPU or you

may choose to order a part number that includes the Compaq Presario 5200 as well as a NEC MultiSync 400 monitor, Compaq PC keyboard and Microsoft mouse. You would enter these "included" items on the Assembly section. Standard configurations are not entered in the Items section. Use the Standard Configuration links to define the standard configurations of items for your organization.

Residual information for each product is entered in the Residual section.

**Residual Source:** Use the Residual Source options to enter and modify the names of residual sources to use when defining residual information about products. Residual sources are business organizations, both internal and external, that estimate the future value of products. Defining their names ensures that they are standardized. You can also enter descriptions for residual sources to help you identify them and specify a default.

**Standard Configuration:** Use the Standard Configuration options to enter and modify standard configurations that can standardize and simplify the procurement of equipment. Any product in Enterprise Insight's product catalog can be combined with one or more additional products to create a standard configuration.

For example, you can create a standard configuration named "Secretary's Workstation" that includes a Compaq PC with 32 MB of RAM, a Compaq 15-inch monitor, an Ethernet card, and a US Robotics 28.8K Sportster modem as well as the software this person uses. You could also create a standard configuration named "Artist's Workstation" that includes a Compaq PC with 512 MB of RAM, a NEC 21-inch monitor, an Ethernet card, and a US Robotics 56.6K Sportster modem with the appropriate design and publishing software. Whenever a new secretary or artist was hired, the standard system with the appropriate products would be ordered.

Standard assemblies are not entered with the Standard Configuration Editor. Use the Product links to define the standard assembly for items

**Tax Category:** Use the Tax Category options to enter and modify the names of tax categories to use when creating products. Tax categories are assigned to products in cases where the applicable tax rate is dictated by commodity, for example Value Added Tax (VAT) in common market countries. Defining the names of tax categories ensures that they are standardized. You can also enter descriptions for tax categories, to help you identify them and specify the default.

## Reference Setup



Use the **Reference** links to add or modify reference setup tables, some of which are pre-populated when Enterprise Insight is installed. (References with available values at install have them noted in their description.) Once you enter reference options, users can select them and Enterprise Insight displays them in the designated field. You can also enter descriptions to help you identify them and specify a default.

The following are records available for set up under **Reference**.

**Acceleration Definition:** Use the Acceleration Definition options to enter and modify the names of acceleration definitions to use when creating master lease and volume purchase agreements, to ensure that the names are standardized. The acceleration definition describes where the interest rate provision is defined – for example, in the master lease agreement. Values available at installation are Master Agreement (default), Other and Specified.

**Acceptance Definition:** Use the Acceptance Definition options to enter and modify the names of acceptance definitions to use when creating master lease and volume purchase agreements, to ensure that the names are standardized. The acceptance definition describes what constitutes acceptance of items – for example, delivery or installation on a user's desk. Values available at installation are Agreement (default), Delivery, Installation and Supplier.

**Carrier:** Use the Carrier options to enter and modify the names of carriers to use when creating receipts and ship documents, to ensure that the names are standardized. The carrier defines the name of the shipper that delivers and transports items. Once you enter carrier names, users can select them, and Enterprise Insight enters them in the Carrier field. You can also enter descriptions to help you identify them and specify a default.

**Casualty Value Policy:** Use the Casualty Value Policy options to enter and modify the names of casualty value policies to use when creating master lease and volume purchase agreements, to ensure that the names are standardized. The casualty value policy defines the policies that are associated with casualty values – for example, repair or replace equipment and vendor's option on equipment casualties. Values available at installation are Group's Option (default), Repair or replace, Stipulated loss table and Vendor's Option.

**Commencement Definition:** Use the Commencement Definition options to enter and modify the names of commencement definition options to use when creating master lease agreements, to ensure that the names are standardized. The commencement definition defines when a lease can commence – for example, when items are received or on the first day of the month. Values available at installation are Default (default), Monthly, Quarterly and Installation.

**Commencement Definition New:** Use the Commencement Definition New options to enter and modify the names of commencement definition new options to use when creating maintenance agreements, to ensure that the names are standardized. The Commencement Definition New field defines what determines the commencement of a new asset on maintenance – for example, when items pass your organization's QA acceptance test or when items are received. Values available at installation are Installation (default), None and Other.

**Commencement Definition Used:** Use the Commencement Definition Used options to enter and modify the names of commencement definition used options to use when creating maintenance agreements, to ensure that the names are standardized. The Commencement Definition Used field defines what determines the commencement of a used asset on maintenance – for example, when items are installed on a user's desk or on the first day of the quarter. Values available at installation are Installation (default), None and Other.

**Commitment Type:** Use the Commitment Type options to enter and modify the names of commitment type options to use when creating volume purchase agreements, to ensure that the names are standardized. The commitment type describes the nature of the quantity commitment – for example, awards given in cash discounts or points awarded for ordering products. Values available at installation are Default (default), Point System and Discount Reward.

**Creditor:** Use the Creditor options to enter and modify the names of creditors to use when creating assets, to ensure that the names are standardized. The creditors are the financial institutions that loaned money for the item.

**Customer Infringement Indemnification:** Use the Customer Infringement Indemnification options to enter and modify the names of customer infringement indemnification options to use when creating

software license agreements, to ensure that the names are standardized. The customer infringement indemnification option describes how the organization will defend against or settle any claims against it that the group's use, modification or application of the software infringes on any patent, copyright or trademark – for example, mutual, total or partial. Values available at installation are Mutual (default), Total and Partial.

**Document Preparation:** Use the Document Preparation options to enter and modify the names of document preparation options to use when creating master lease and volume purchase agreements, to ensure that the names are standardized. The document preparation options define who prepares the documentation for the MLA or VPA – for example, the group, supplier, legal department or outside accountants. Values available at installation are Group prepares (default) and Supplier prepares.

**Early Termination Policy:** Use the Early Termination Policy options to enter and modify the names of early termination policy options to use when creating master lease agreements, to ensure that the names are standardized. The early termination policy defines the choices for early termination of leases – for example, present value at current acceleration rate. Values available at installation are None (default), Present Value, Sharing and Termination Value.

**Exclusions:** Use the Exclusions options to enter and modify the names of exclusions to use when creating software license agreements, to ensure that the names are standardized. The exclusions option describes what is excluded from the support coverage provided under the terms of the agreement. Values available at installation are Data Sources (default), Integrations and Custom Development.

**Grade:** Use the Grade options to enter and modify the names of grades to use when creating products and assets, to ensure that the names are standardized. The grade defines the item's classification – for example, obsolete or not-obsolete. Values available at installation are Obsolete and Not Obsolete (no default value is designated).

**Insurer:** Use the Insurer options to enter and modify the names of insurers to use when creating assets, to ensure that the names are standardized. The insurer defines the name of the insurance company on the policy that covers the asset.

**Invoice Due:** Use the Invoice Due options to enter and modify the names of invoice due options to use when creating master lease agreements to ensure that the entries are standardized. The invoice due option defines when the billing period begins and invoices are due. Values available at installation are Default (default), 1<sup>st</sup> of Following Month, Anniversary, Last of Month and Other.

**Lease Type:** Use the Lease Type options to enter and modify the names of lease types to use when creating lease documents, to ensure that the names are standardized. The lease type describes the accounting classification for the lease – for example, operating lease or capital lease. Values available at installation are Operating (default) and Capital.

**License Type:** Use the License Type options to enter and modify the names of license types to use when creating software license agreements to ensure that the entries are standardized. The license type describes the type of license provided under the agreement – for example, single license or concurrent user. Values available at installation are Site (default), Concurrent User and Single License.

**Payment Terms:** Use the Payment Terms options to enter and modify the names of payment terms to use when creating procurement, lease, lease out and sale documents, to ensure that the names are standardized. The payment terms defines the frequency at which payments are due – for example, annual in advance, annual in arrears, monthly in advance, and monthly in arrears. Values available at installation are AADV (recurring annual advance), AARR (recurring annual in arrears), MADV (recurring monthly in advance), MARR (recurring monthly in arrears), QADV (recurring quarterly in advance), QARR (recurring quarterly in arrears), SADV (recurring semi-annual in advance), SARR (recurring semi-annual in arrears), ANNL (non-recurring annual) and Net 30 (non-recurring payment. There is no designated default value.

**Project:** Use the Project options to enter and modify the names of projects to use when creating assets and procurement documents, to ensure that the names are standardized. The project specifies the use to which the asset will be applied in your organization, and is always optional.

**Purchase Option:** Use the Purchase Option options to enter and modify the names of purchase options to use when creating master lease agreements, leases and lease out documents, to ensure that the names are standardized. The purchase option defines the lessee's option to purchase items at the end of the lease – for example, at fair market value, or at a bargain price. Values available at installation are None (default), Less than FMV, Greater than FMV, Bargain, FMV, Other, Specified (on lease schedule), and Transfer Ownership.

**Relocation Consent:** Use the Relocation Consent options to enter and modify the names of relocation consent options to use when creating master lease agreements and maintenance documents, to ensure that the names are standardized. The relocation consent option describes how consent must be obtained to relocate leased items– for example, written or verbal. Values available at installation are Written (default), Any, Verbal and None.

**Relocation Right:** Use the Relocation Right options to enter and modify the names of relocation right options to use when creating master lease agreements and maintenance documents, to ensure that the names are standardized. The relocation right describes the lessee's right to relocate the items on a lease – for example, anywhere without restrictions or within the group only. Values available at installation are Anywhere (default), Within Continent, Within Country, Within Legal Jurisdiction, No Right and Within UCC Jurisdiction.

**Renewal Option:** Use the Renewal Option options to enter and modify the names of renewal options to use when creating master lease agreements, leases, and maintenance documents, to ensure that the names are standardized. The renewal option defines the group's option to renew the maintenance agreement and the lessee's option to renew the lease – for example, at less than or greater than fair market value. Values available at installation are FMV (default), less than FMV, No Renewal Option, Specified (on lease schedule) and Other.

**Retirement Type:** Use the Retirement Type options to enter and modify the names of retirement types to use when creating sale or retirement documents, to ensure that the names are standardized. The retirement type describes how the asset is being disposed of – for example, whether the item is being donated to another organization, sold to an employee, or disposed of as scrap. Values available at installation are Sale, Donate to Church, Donate to Charity and Scrap. There is no designated default value.

**Stage:** Use the Stage options to enter and modify the names of stages to use when creating assets, to ensure that the names are standardized. An item's stage clarifies where it is and/or whether it is being used – for example, dock, in use, in shipping, storage. Values available at installation are Received (default), Stock, Equipment User, Discovered and To Be Shipped.

**Sublease Policy:** Use the Sublease Policy options to determine whether or not, and under what conditions, an asset on a lease can be subleased. Values available at installation are Not Allowed, Lessor's Discretion, Written Consent with Acceptable Credit, Written Notice and Verbal Notice. There is no designated default value.

**Support Coverage:** Use the Support Coverage options to enter and modify the names of support coverage options to use when creating software license agreements, to ensure that the names are standardized. The support coverage option describes the type of support coverage provided under the terms of the agreement – for example, work week or after hours support. Values available at installation are

**Upgrade Option:** Use the Upgrade Option options to enter and modify the names of upgrade options to use when creating master lease agreements, to ensure that the names are standardized. The upgrade option describes the lessee's right to upgrade the items on the lease – for example, less than or greater than fair market value. Values available at installation are FMV (default), Last Look, Maximum Present Value, Other, Penalty and (defined in) Schedule.

**Upgrades:** Use the Upgrades options to enter and modify the names of upgrades to use when creating software license agreements, to ensure that the names are standardized. The upgrades describe how

software upgrades will be provided under the terms of the agreement – for example, automatic, select or annual. Values available at installation are Automatic (default), Select and Annual.

**Usage Constraints:** Use the Usage Constraints options to enter and modify the names of usage constraints options to use when creating software license agreements, to ensure that the names are standardized. The usage constraints option describes the limitations on product use – for example, user, site or non-transferable. Values available at installation are User (default), Site and Non-transferable.

**Vendor Infringement Indemnification:** Use the Vendor Infringement Indemnification options to enter and modify the names of vendor infringement indemnifications to use when creating software license agreements, to ensure that the names are standardized. The vendor infringement indemnification option describes how the vendor will defend against or settle any claims against it that the group's use, modification or application of the software infringes on any patent, copyright or trademark – for example, mutual, total or partial. Values available at installation are Mutual (default), Total and Partial.

## Global Search Results Settings

**Global Search Results Settings** Save Cancel Help

View all results when searching

View  results per page

---

Return all search results

Limit search results to  records

---

View all items in the items page

View  items per Items page

Users and administrators can set their search results preferences using **Global Search Results Settings** located on the **Settings** page of Enterprise Insight.

Options include:

**View all results:** Click this radio button to return all results matching the criteria entered. Use this option if you prefer to scroll through a whole list rather than paging up or down through a list.

**View XX results per page:** Click this radio button and enter the number of results you want Enterprise Insight to return in a search. This option requires you to page up or down to navigate the results.

**Return all search results:** Click this radio button to view all results (default).

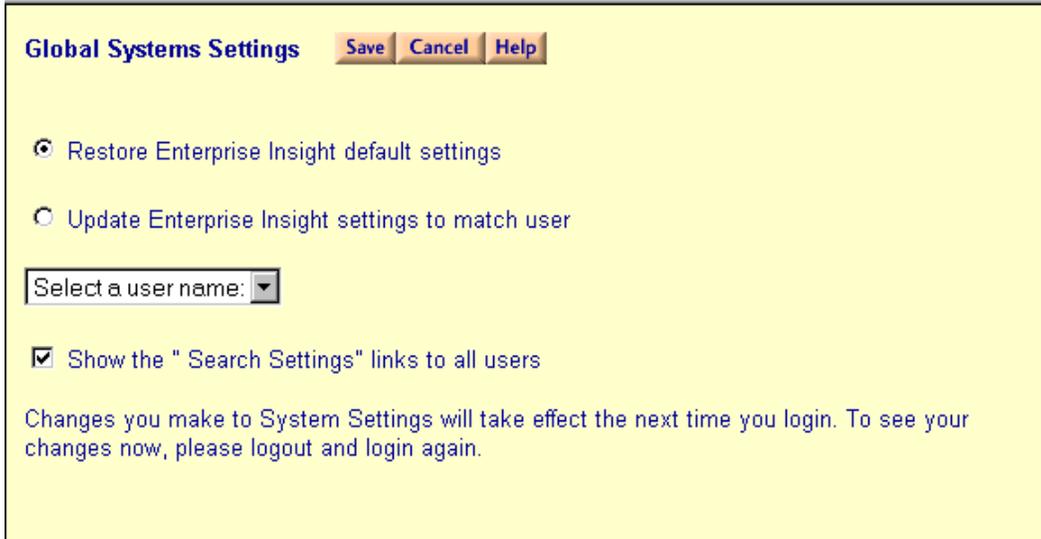
**Limit search results to X records:** Click this radio button and enter a number to limit the number of records returned in a search.

**View all items in the items page:** Click this radio button to lists all items included in the results of the search.

**View X items per page:** Click this radio button and enter a number to limit the number of items returned in the results of the search.

## Global System Settings

Administrators can set the system settings for all users using this link from the **Settings** page. Changes made on this page, whether by an administrator or user, will not take effect until they have logged out and back into Enterprise Insight.



**Global Systems Settings** [Save](#) [Cancel](#) [Help](#)

Restore Enterprise Insight default settings

Update Enterprise Insight settings to match user

Select a user name:

Show the " Search Settings" links to all users

Changes you make to System Settings will take effect the next time you login. To see your changes now, please logout and login again.

**Restore Enterprise Insight default settings:** Restores the default settings used during installation.

**Update Enterprise Insight settings to match user:** Select a user's name from the drop-down box to use as new settings for Enterprise Insight.

**Show the "Search Settings" links to all users:** This allows every Enterprise Insight user to make changes to the search settings to customize their search results.

## Update License Key

Your organization's license agreement for Enterprise Insight is based on three factors: a maximum asset count, a maximum number of users and whether or not you have a license to use Lease and/or Procurement modules. When either the asset count or user count exceeds your original license agreement, users will begin to see warnings when they log in. Initially, the log in warnings will tell users that the count has been exceeded, but they can temporarily continue working while the license agreement is upgraded. A description of these messages is found below.

This grace period is provided to give your organization time to update the license. When the asset count or user count exceeds the original license agreement by 10%, users will no longer be able to login.

To update your license key, click **Settings** from Enterprise Insight's navigation toolbar, and select **Update License Key**.

The **Current License Key** will appear in the upper text box. Enter the **New License Key** in the lower one and click **OK**. Your license key will be updated and your users will have full use of Enterprise Insight.

## License Agreement Login Messages

When the license agreement is exceeded, users will see one of the following login messages. Please contact technical support at 1-800-4TANGRAM as soon as a user reports seeing the first warning, in order to expedite your license upgrade.

- **Asset Count Warning:** The maximum number of assets permitted under your License Agreement are already entered. This message is a reminder. You may temporarily continue using Enterprise Insight.
- **Asset Count Exceeded:** The maximum number of assets permitted under your License Agreement are already entered. You cannot add assets until your License Agreement is modified.
- **User Count Warning:** The maximum number of users permitted to login concurrently under your License Agreement has been exceeded. This message is a reminder. You may temporarily continue using Enterprise Insight.
- **User Count Exceeded:** The maximum number of users permitted to login concurrently under your License Agreement has been exceeded. You may not login now. Try again later when other users have logged out.

## Update Preferences

Below are the values to be entered, or edited, in the Update Preferences window.

**Notice Duration:** Enter, or select from the drop-down list, day, week, month, quarter, year as the unit of time to use as the default for notices, such as Lessee Termination or Renewal. You may also specify the number of units of time (such as 30 days) to be used as the default value.

**Contract Duration:** Enter, or select from the drop-down list, day, week, month, quarter, year as the unit of time to use as the default on all contracts such as Lease, Maintenance or Software License Agreement. You may also specify the number of units of time (such as 3 years) to be used as the default value.

**Warranty Duration:** Enter, or select from the drop-down list, day, week, month, quarter, year as the unit of time to use as the default on all warranties on assets. You may also specify the number of units of time (such as 24 months) to be used as the default value.

**Useful Life Duration:** Enter, or select from the drop-down list, day, week, month, quarter, year as the unit of time to use as the default for the useful life of assets. You may also specify the number of units of time (such as 36 months) to be used as the default value.

**Expiration Lead Time:** Enter, or select from the drop-down list, day, week, month, quarter or year as the defined length of time before a notice date you want to be notified by email. For example, you want to be notified by email 60 days before the notification date.

**SMTP Host:** (Simple Mail Transport Protocol). Type in the name of the mail server that directs mail to your company's users. This is needed for users when they elect to be notified by email of critical dates.

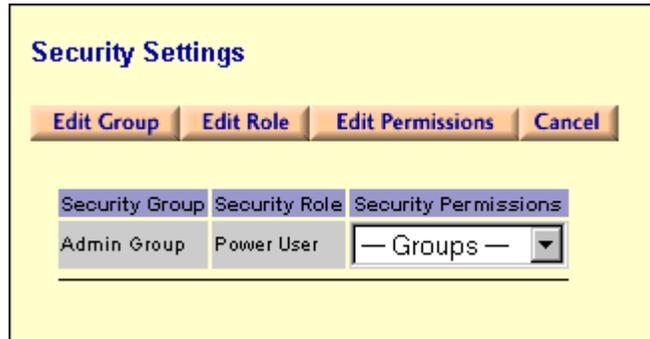
**Return Email Address:** Type in the email address where Enterprise Insight would return non-deliverable email messages. For example, use the email address of the Enterprise Insight Administrator.

**Notify Critical Dates by Email:** Click to check this box (users and administrators) to receive email notification of critical dates generated by the Calendar.

**Asset Insight Schema:** Available as a separate module. Please contact your Tangram Enterprise Solutions Associate for details.

## Security Settings

On the Settings page, there is the option to set up, and administer, security settings for Enterprise Insight users and groups. Click **Security Settings** to add, delete, and edit security settings.



To edit the security values for a group, click **Edit Group**. The **Security Group Editor** window appears. It lists the members of the group as well as users available to be part of this group. Use the arrows to move users back and forth between the windows.



You can also create a group. Click **Create**. The **Create Security Group** window appears.



Type in the name of the new Security Group and click **Save**. The **Security Group Editor** window appears. Add members into the group from the Available list.

To edit the permissions and access of users, click **Edit Role** on the **Security Settings** page. The **Security Role Editor** window appears.

Use the Security Role Editor to add functions to, or create, a security role. To add functions, click on the arrows to add them from Available Functions to Member Functions. Delete functions by clicking the arrows to move the function from Member to Available.

You can also delete a security role here.

To create a new role, click **Create** and enter in the name. Click **Save** to return to the Security Role Editor where you may add functions to the role.

To edit permissions for a group, select the group from the drop-down menu underneath **Edit Permissions**, then click Edit Permissions. The **Security Permissions Editor** appears.

Select a security group or role and click **View**. The **Security Group** or **Security Role** editor window will appear (depending on which you chose). Use the arrows to add or delete groups or roles.

## Change Password

This option on the **Settings** page allows you to change the password you use to log into Enterprise Insight.

Type in the user login, the new password desired and the old password to confirm the change. Click **Save**.

## Add Custom Field

Use **Add Custom Field** to enter and modify custom fields to track information that is specific to your organization. This option provides the ability to create additional user-defined fields in the tables of the Enterprise Insight database. The fields created here (Field Name) will appear on the Custom Field Tab of each designated table (Field For). You may also include Custom Fields in reports created with Report Agent.

Record Detail for: Custom Field

? Field Name:

? Field For:

? Data Type:

**Custom field names must meet the following requirements.**

The first character must be a letter as defined by the Unicode Standard 2.0. The Unicode definition of letters includes Latin characters a-z and A-Z, in addition to letter characters from other languages.

Subsequent characters can be:

- Letters as defined in the Unicode Standard 2.0.
- Decimal numbers from either Basic Latin or other national scripts.
- The @, \$, #, or \_ symbols.
- The name cannot exceed 27 characters in length.

## About Insight

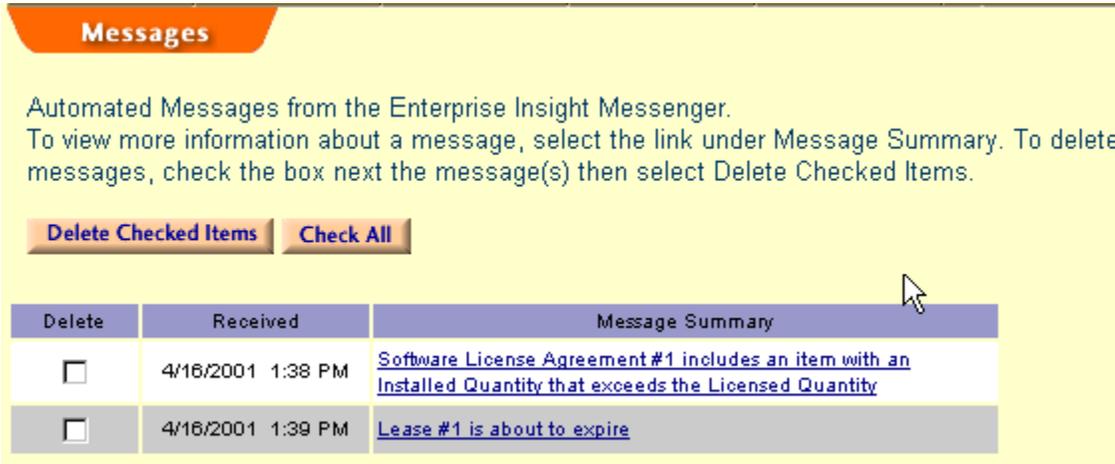
Clicking the Enterprise Insight banner on the main page provides you with the following information

- 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

## Chapter 4. Messenger

The Messenger program is executed via a batch file and checks all submitted, and returned needs, and orders to give email and login notification to the appropriate users. The notification of messages waiting for a user appears on the **Insight** Today page when they log in to Enterprise Insight.

When the user clicks on the link [You have X messages](#), they are taken to a page where they can read and delete them. It is advisable to delete messages that are no longer needed in order to conserve disk storage space.



The screenshot shows a web interface for managing messages. At the top, there is a yellow header with the word "Messages" in a blue box. Below the header, there is a blue box containing the text: "Automated Messages from the Enterprise Insight Messenger. To view more information about a message, select the link under Message Summary. To delete messages, check the box next the message(s) then select Delete Checked Items." Below this text are two buttons: "Delete Checked Items" and "Check All". At the bottom, there is a table with three columns: "Delete", "Received", and "Message Summary". The table contains two rows of messages.

Delete	Received	Message Summary
<input type="checkbox"/>	4/16/2001 1:38 PM	<a href="#">Software License Agreement #1 includes an item with an Installed Quantity that exceeds the Licensed Quantity</a>
<input type="checkbox"/>	4/16/2001 1:39 PM	<a href="#">Lease #1 is about to expire</a>

The program also searches all contracts and identifies upcoming expiration dates, resulting in login messages being displayed and email messages being sent to Enterprise Insight users prior to the expiration date. Messenger also expires contracts when the Original Expiration Date passes and calculates assets on Software License Agreements.

This program is scheduled to run automatically on a daily or weekly basis in order for users to see the reminders they are expecting, and for the status of contracts to be updated to Expired.

The Enterprise Insight Messenger is installed in the directory where you installed the Enterprise Insight Server files.

## Configuring Messenger

Enterprise Insight Messenger is automatically installed when you install Enterprise Insight. To configure the program, either click **Start → Enterprise Insight → Messenger Configuration** or run it from the list of **NT Services**.

Messenger Configuration allows you to start and stop Messenger services, view the log file of updates and errors as well as set the frequency for the Messenger to perform its checks on software licenses, expiration dates, and so on. An example of the log file:

```

Eimgsvc - Notepad
File Edit Search Help
04-19-2001 14:08:55 : Service Started
04-19-2001 14:08:56 : Connected to Database
04-19-2001 14:08:56 : Update Frequency = 1
04-19-2001 14:08:56 : 04/18/2001 10:15:35
04-19-2001 14:09:01 : Checking for Updates
04-19-2001 14:09:02 : Message sent to jbrown@tp.com
04-19-2001 14:09:25 : Service Stopped

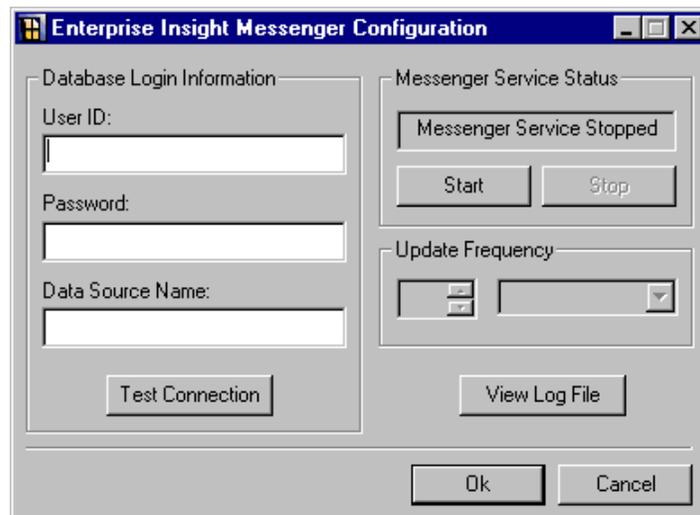
```

To run Messenger Configuration, you must be running Windows NT (services are not supported under Windows 95/98) and have administrative privileges to your computer.

By default, the Messenger is turned on for users who are configured to receive notifications from Messenger.

Messenger is set with pre-loads of checks for expiration dates, assets assigned to software licenses, lease expirations and so on.

In order to start, stop, view the log file, or set the frequency in the Messenger Configuration, you must enter the user ID, password, Data Source Name and click **Test Connection**. Until this has been performed, the options will appear grayed out.



## Chapter 5. Importer

Importer is an integration tool for the importing and exporting of data. With this tool, the task of entering your present inventory into Enterprise Insight, or taking data from the Enterprise Insight database into Excel, is accomplished quickly.

Importer can import data from an external source into the EI database, or export data from the EI database into Excel, one time or on an ongoing basis. Importer loads and extracts the data using the EI API. Once data is imported, it can be viewed and edited in Enterprise Insight's editors.

The following five steps are used to import data from an Excel workbook:

- Identify and collect the data to be imported.
- Start Importer and create a new workbook for the data.
- Insert the data in the Importer workbook.
- Start Importer again and create an import job.
- Run the import job.

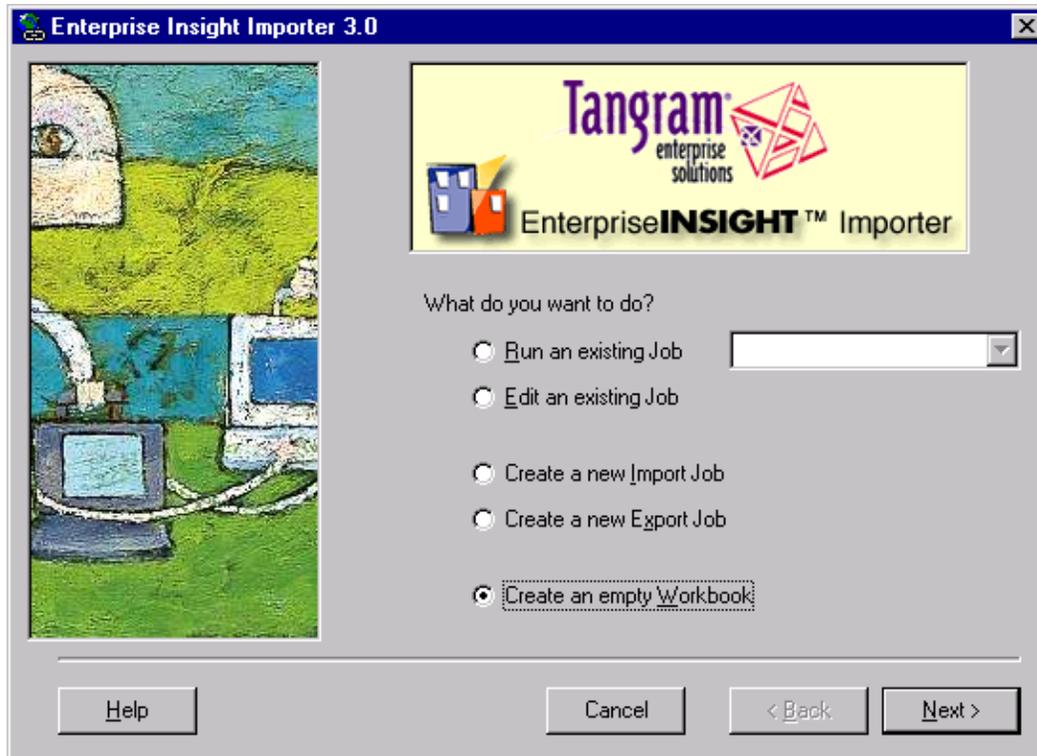
The following three steps are used to import data from an ODBC data source into the EI database:

- Identify and collect the data to be imported.
- Start Importer and create an import job.
- Run the import job.

The following two steps are used to export data from the EI database into an Excel workbook:

- Start Importer and create an export job.
- Run the export job.

The above procedures are described in detail in this guide.

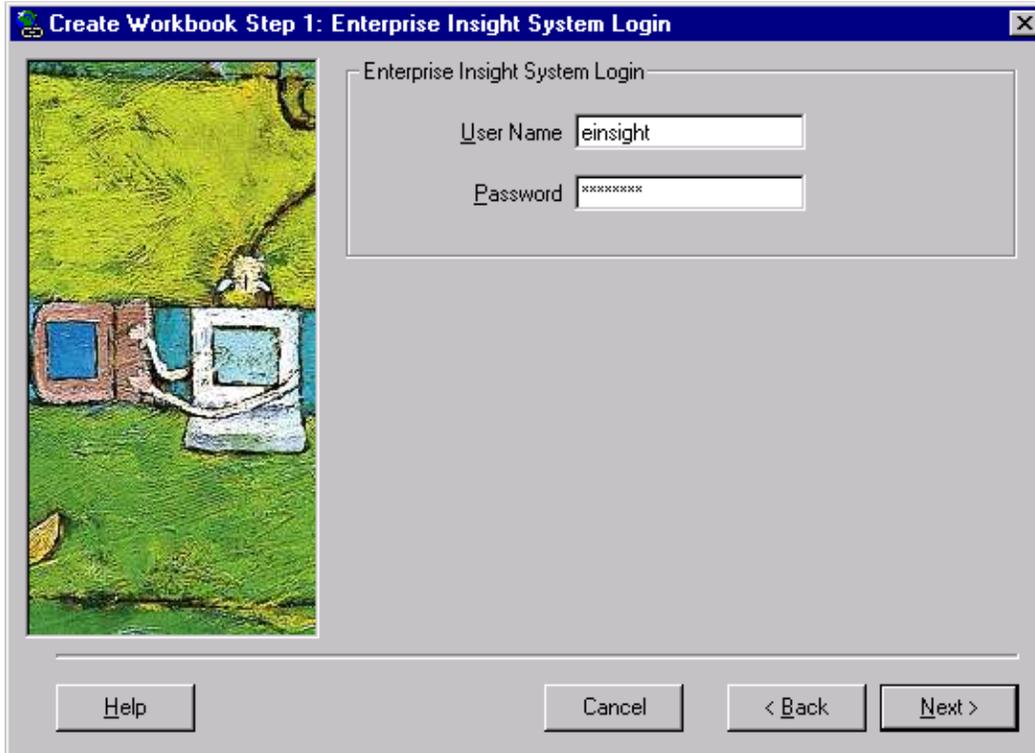


## Creating an Empty Workbook

An Importer workbook must be created to import spreadsheet (.XLS format) data into the EI database. You can create a new workbook each time you will be importing data, or simply add the data to an existing workbook. To import data for the first time into Enterprise Insight, you must create a new empty workbook.

To create an empty workbook:

1. Start Importer. Click **Start → Enterprise Insight → Importer**.
2. This launches Importer and a wizard guides you through most of the steps.
3. Click **Create an Empty Workbook**. Click **Next**.
4. Type the user name and password for the EI database where the data will be imported in the Enterprise Insight System Login window.



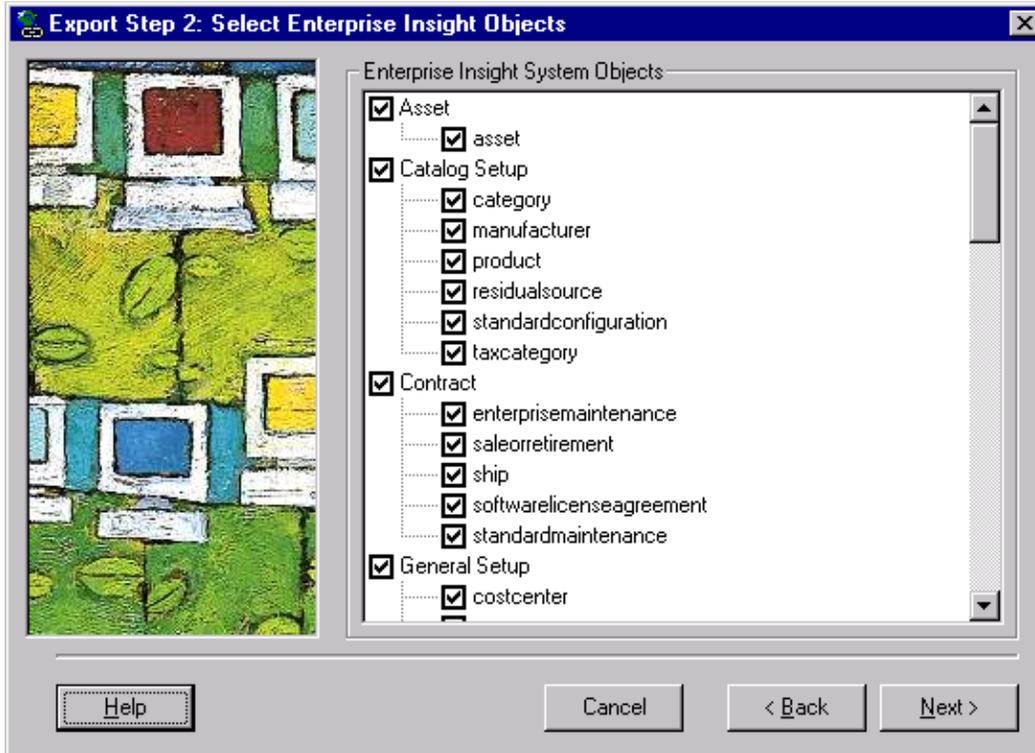
Enterprise Insight System Login

User Name

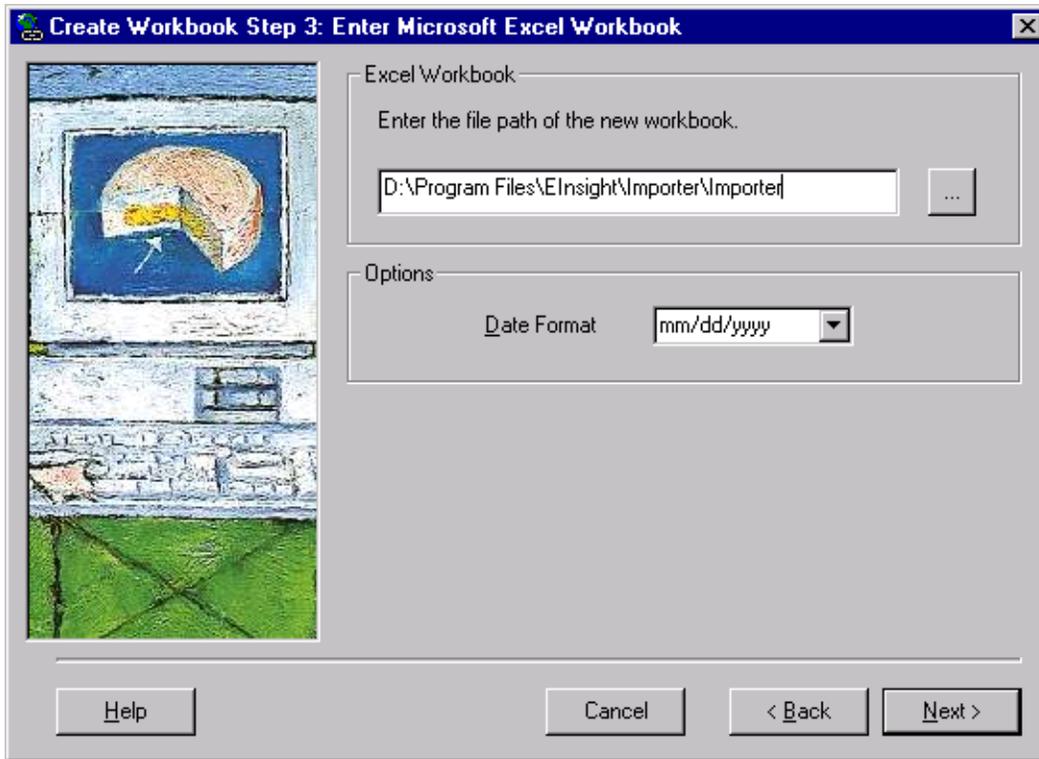
Password

Help Cancel < Back Next >

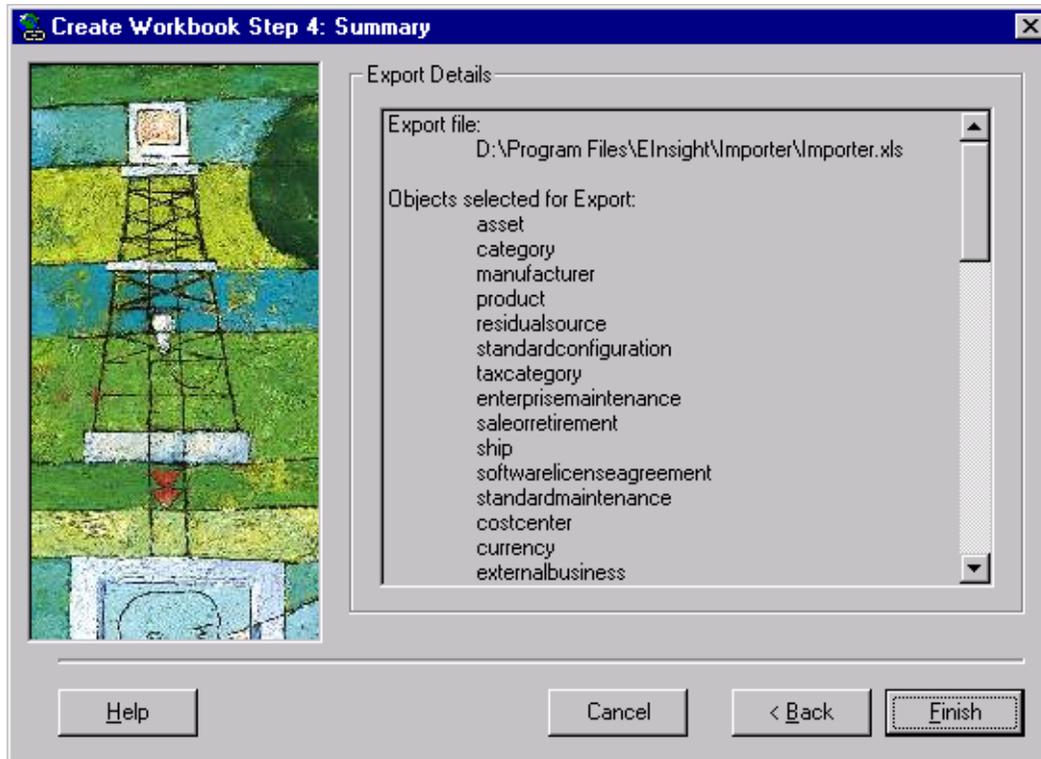
5. From the Enterprise Insight System Objects list, select the data objects to import. The workbook will include worksheets for this data. All objects are selected by default. Click to remove the check by any record type not to import. Click **Next**.



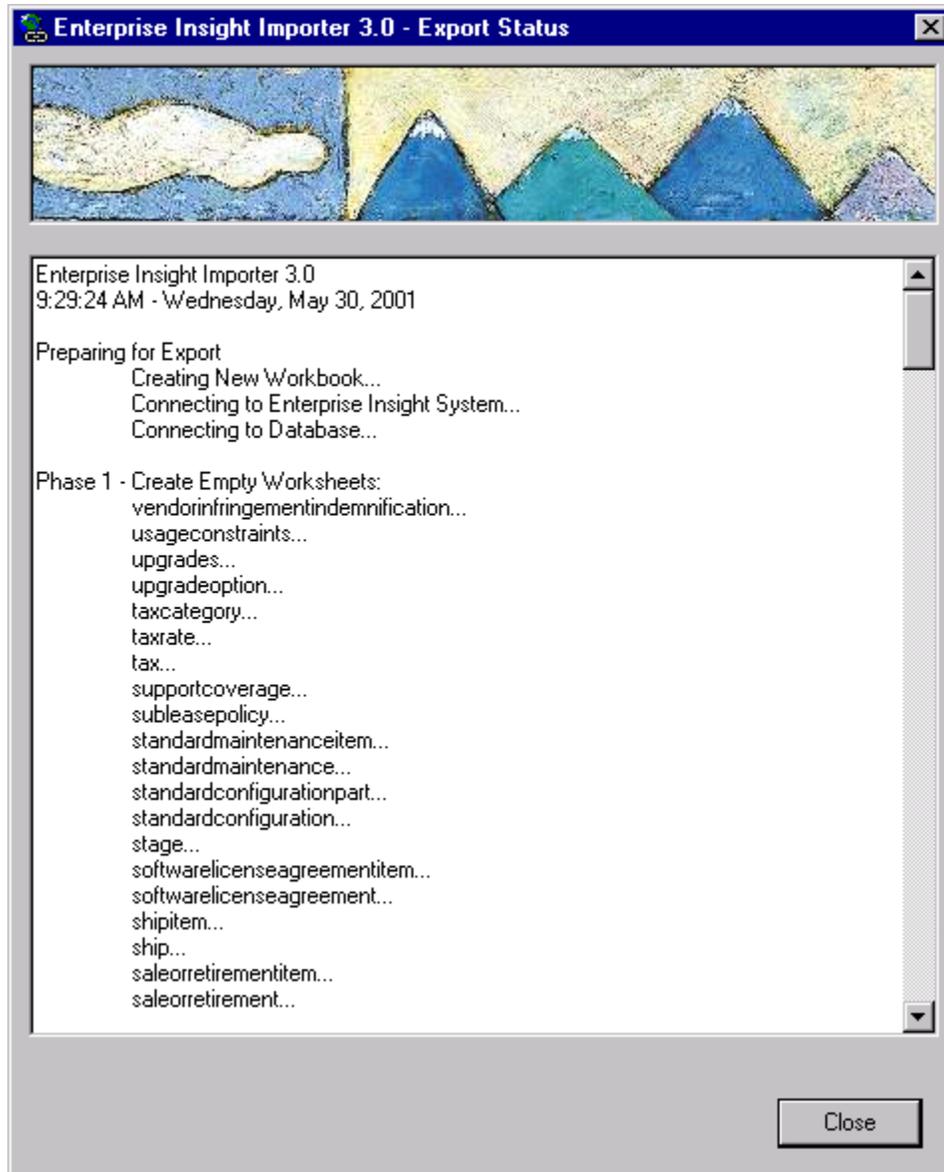
6. In the Excel Workbook box, enter the full file path and a new name for the Importer workbook (source). Either type the path or use the **Browse**  button. If you enter the name of an existing workbook, Importer prompts before overwriting it. You do not need to enter the .xls extension.

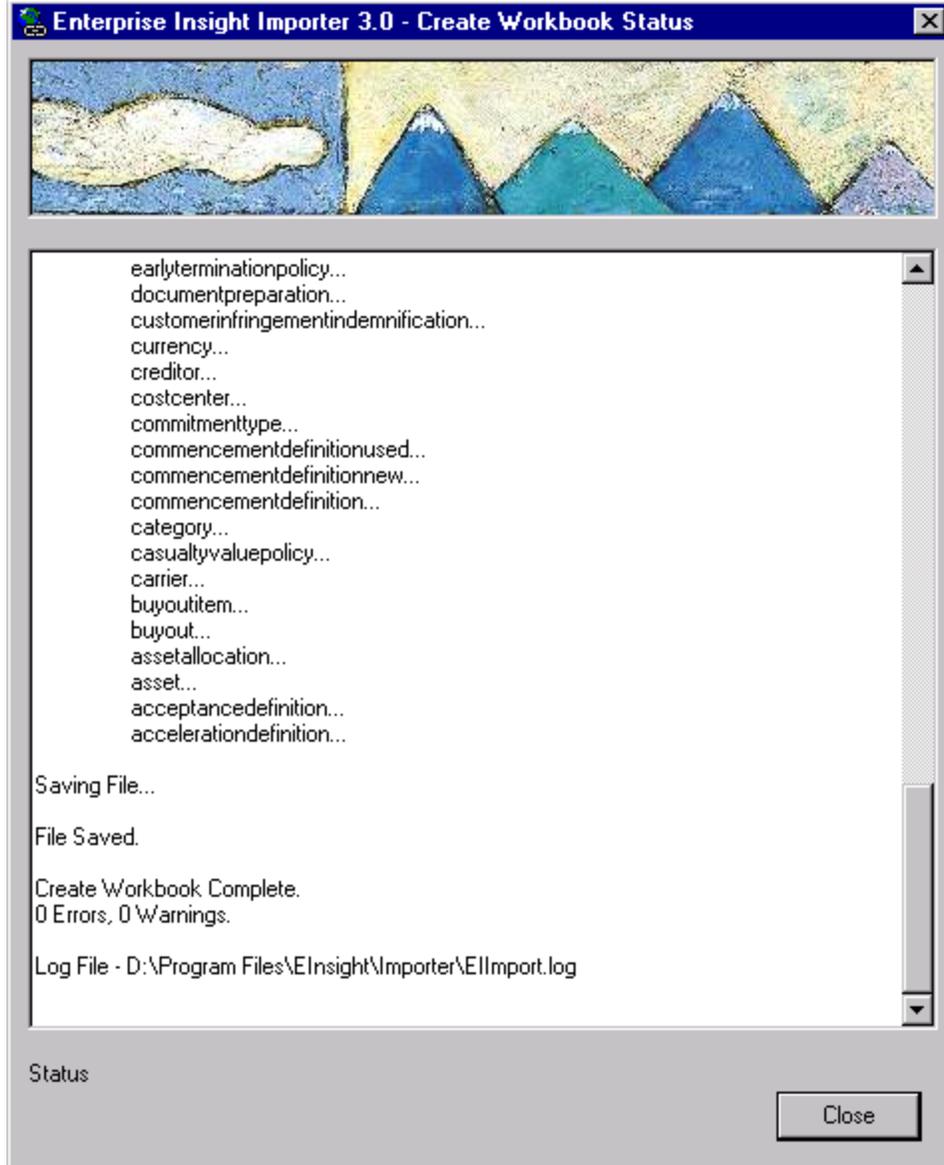


7. Select the **Date Format** preferred from the list. This format is applied to any worksheet cells that contain dates. Click **Next**.
8. Review your selections on the **Summary** page. Click **Finish** to create the workbook.



9. As Importer creates the new workbook with empty worksheets needed for the imported data, status screens appear with Importer's progress. See Viewing the Log on page 54 for information about the displayed messages.





**10. Click Close.**

The new workbook will be in the file location entered in step 6.

## Inserting Data In the Workbook

Importer creates a customized spreadsheet for importing data. The spreadsheet is an Excel workbook with multiple worksheets corresponding to the different objects stored in Enterprise Insight. Once data is copied or inserted into the workbook, you can import it into Enterprise Insight. For example, if you wanted to import your asset data into Enterprise Insight, create an Importer workbook (see **Creating an Empty Workbook**), copy the existing asset data to the Asset worksheet, create an import job, and run the import.

The workbook is a template that organizes the data exactly as Importer expects to find it, enabling a smooth import into Enterprise Insight.

When created, the Importer workbook contains the following columns and labels:

**Column A, Import Status.** Populated by Importer after running an import or export. **Do not enter data in this column.** One of the following values will display after running import or export:

- **Imported.** The data in the row was successfully imported into the Enterprise Insight database.
- **Exported.** The data in the row was successfully exported from the Enterprise Insight database.
- **Skipped.** The data in the row already existed in the Enterprise Insight database.
- **error-data.** The data in the row was not imported. The column name of the item that caused the error is shown.
- **error-save.** The data in the row was not imported. Some unknown error may have occurred.

**Column B, System ID.** Populated by Importer after running an import. **Do not enter data in this column.** The System ID number is an object ID, not the Enterprise Insight ID and can be used to verify that the data in the row was successfully imported.

When Enterprise Insight finds a duplicate for the following objects, it sets the system ID of the duplicate entry to that of the entry it has duplicated.

- all Reference objects
- category
- costCenter
- customField
- currency
- ExternalBusiness
- group
- location
- maintenanceCoverage
- standardConfiguration
- tax (i.e.TaxCode)
- unit
- person

**Column C, not labeled.** Column C is always left blank.

**Columns D and above.** Use these columns to organize the data to import into the EI database. The names of the data fields correspond to the names in Enterprise Insight and in Enterprise Insight Explorer. They display as the names appear in the EI API and so begin with lowercase letters and do not include spaces. For example, in the Asset worksheet, acceptanceDate is Acceptance Date field, assetTagNumber is Asset Tag Number field, and equipmentUser is Equipment User field. Red column headings indicate required fields in Enterprise Insight. If required fields are blank, the worksheet will fail during the validation stage of the import. Blue headings indicate optional fields, which may be left blank if the data is not available. Green headings indicate custom fields.

To learn more about the types of data that should be inserted into columns D and above, refer to the field definitions topics in the Enterprise Insight online help or the comments in each column heading.

Insert the data into the workbook using any manual or automatic method you find most efficient. You may customize the workbook as long as the worksheet format is not changed. After data is added to the Importer workbook, you are ready to run an import with Importer. See Customizing the Importer Workbook below.

## Customizing the Importer Workbook

You can customize the Importer workbook so it only includes worksheets and columns for the data you need to import. You can:

- Delete all worksheets not used to import data. If you selected objects not needed when creating the Importer workbook, you can delete these unnecessary worksheets from the workbook.
- In worksheets to be imported, delete all columns not used, as long as the columns are not for required fields.
- Add columns in order to import custom field values. These are values specific to your organization, defined as custom fields in the EI database.

To add a column for a custom field value, select the worksheet corresponding to the Enterprise Insight Editor where it displays and add a column for the custom field. Enter the custom field name as the column name.

If the custom field name ends in "ID" (with a space), you will not be able to set it because Importer uses the "ID" postfix on fields which are pointers to other objects (like "Asset ID" or "MLA ID" or "Lease ID"). You must rename the custom field ending in "ID" if you want to import it using Importer.

### Clearing the Status Column

It is possible to import data from a workbook where exported data was loaded, by using the Excel macro (ThisWorkbook.ClearAllImportStatuses). This macro clears the Import Status and the System ID columns in the entire workbook, so that you can use the same spreadsheet to export and import. After importing or exporting, select Macro from the Tools menu to display the ThisWorkbook.ClearAllImportStatuses macro in the window. Click **Run** to remove all the Import/Export statuses and IDs in the workbook.

### Deleting the Default Contact Column

Importer first imports Groups, then Persons. As a result, Default Contacts for the Group cannot be imported because Persons are not yet in the database. The workaround is to delete the Default Contact column in the Group worksheet.

## Creating an Import Job for Excel

To import data into the Enterprise Insight database from an Excel workbook after you have inserted data in it, create a Importer import job, then run it.

To create the Importer Import job:

1. Start Importer. Click **Start → Enterprise Insight → Importer**.
2. Select the **Create a New Import Job** option. Click **Next**.
3. The **Import from Microsoft Excel Workbook** option is selected by default. Click **Next**.
4. Type the user name and password for the EI database where you'll import the data in the Enterprise Insight System Login window.
5. In the **Workbook to Import** box, enter the full path to the Importer workbook containing your data (the source). Type the path or use the browse button to find and enter it.
6. In the Available Worksheets list, select all the worksheets that contain data to be imported into Enterprise Insight. To select a worksheet, double-click it, or highlight it and click the > button. To select all worksheets, click the >> button. Then click Next.
7. Enter a name for this Excel Import Job. The Job file will store the settings and selections you just made. Then click Next.

8. Review your selections on the Summary page. Then click Save Job to create the Job file with your settings and selections.
9. Click OK when you see the Job Saved message.

The Importer opening dialog displays. You can run the import job just created.

## Creating an Import Job for a Data Source

You can import data from an ODBC data source. The data source name must be setup on your computer for you to select it as the source in Importer. To import data, you must create an import job, and then run it.

To create the Importer Import job:

1. Start Importer. Click **Start → Enterprise Insight → Importer**.
2. Select the Create a New Import Job option. Then click Next.
3. Select the Import from ODBC Data Source option. Then click Next.
4. In the Enterprise Insight System Login section, type the User Name and Password of the Enterprise Insight database to which you will be importing the data (the destination).
5. In the Data Source Login section, type the User Name and Password of the database from which you will be importing the data (the source).
6. Select the source database from the Data Source Name list. Then click Next.
7. In the Database View column, enter the name of the first view in the source database. In the Enterprise Insight Object column, select the Enterprise Insight object that corresponds to the view. To select an object, click in the cell to display the drop-down list, then select it from the list.
8. Click Add to add a new row for another view. In the Database View column, enter the name of the next view in the source database. In the Enterprise Insight Object column, select the Enterprise Insight object that corresponds to the view. Repeat this process for each view you want to include in the import. Then click Next.
9. Enter a name for this ODBC database Import Job. The Job file will store the settings and selections you just made. Then click Next.
10. Review your selections on the Summary page. Then click Save Job to create the Job file with your settings and selections.
11. Click OK when you see the Job Saved message.

The Importer opening dialog displays. You can run the Import job just created.

## Creating an Export Job

You can export data from the Enterprise Insight database and populate an Excel workbook with this data, in order to use the data for other purposes, such as supplying it to another application. To export data, you must create an export job, and then run it.

When you export records, Importer may also export additional records that you did not select. This is because many objects have ID references to other objects. For example, The Lease Item tab includes an

Asset ID column that indicates which assets are on the lease and the Lease ID column that points to the MLA that governs the lease. The column for these fields contains an ID that points to a row in another worksheet; that row contains all the details for that object. If Importer didn't export the asset and MLA information, there would be no way to see what assets were on the lease or which MLA the lease belonged to.

To create the Importer Export job:

1. Start Importer. Click **Start → Enterprise Insight → Importer**.
2. Select the Create a New Export Job option. Then click Next.
3. In the Enterprise Insight System Login section, type the User Name and Password of the Enterprise Insight database from which you will be exporting the data (the source).
4. In the Enterprise Insight System Objects list, select the objects that you want to export. All objects are selected by default. Click on the check box to remove the check from every object you do not want to export. Then click Next.
5. In the Excel Workbook box, enter the full path and new name for Importer workbook in which you want to store your data. Type the path or use the  button to find and enter it. If you enter the name of an existing workbook, Importer prompts you before overwriting it.
6. Select the Date Format you prefer from the list. Then click Next.
7. Enter a name for this Export Job. The Job file will store the settings and selections you just made. Then click Next.
8. Review your selections on the Summary page. Then click Save Job to create the Job file with your settings and selections.
9. Click OK when you see the Job Saved message.

The Importer opening dialog displays. You can run the Export job just created.

## Running an Import

You can import data from an Excel workbook or ODBC database. To import data, you must create an import job for Excel or create an import job for the database, and then run it.

To run the Importer import job:

1. Start Importer. Click **Start → Enterprise Insight → Importer**.
2. Click the **Run an Existing Job** option
3. Select the job name from the list. Then click **Next**.
4. Enter your user ID and password.
5. Importer prepares the import, validates the data (Phase 1), and then imports the data (Phase 2). The import status log displays to inform you of the progress. When the import is completed, the message Import Successful appears. See the online help file on Viewing the Log for more information about the messages that display.

6. Click Close to close this dialog.

You can verify the results of the import by opening the Importer workbook. In column A, "Imported" displays for every row that was imported and a System ID has been inserted in Column B.

## Correcting Errors

If Importer finds errors in the workbook, open the worksheet where they were found, and verify that the correct information was entered in the specified rows. Replace data that was not entered correctly. Add data if it was missing from required fields. Then save the revised workbook and repeat the steps above.

## Running an Export

You can export data from the Enterprise Insight database and populate an Excel workbook with this data, in order to use the data for other purposes, such as supplying it to another application. To export data, you must create an export job, and then run it.

When you export records, Importer may also export additional records that you did not select. This is because many objects have ID references to other objects. For example, The Lease Item tab includes an Asset ID column that indicates which assets are on the lease and the Lease ID column that points to the MLA that governs the lease. The column for these fields contains an ID that points to a row in another worksheet; that row contains all the details for that object. If Importer didn't export the asset and MLA information, there would be no way to see what assets were on the lease or which MLA the lease belonged to.

To run the Importer export job:

1. Start Importer. Click **Start** → **Enterprise Insight** → **Importer**.
2. Click the **Run an Existing Job** option.
3. Select the job name from the list. Then click **Next**.
4. Enter your user ID and password.
5. Importer prepares the export and creates the new workbook (if you didn't specify an existing workbook), creates the empty worksheets (Phase 1), and then exports the data (Phase 2). The export status log displays to inform you of the progress. When the export is completed, the message Export Successful appears. See the online help on Viewing the Log for more information about the messages that display.
6. Click Close to close this dialog.

You can verify the results of the export by opening the Importer workbook. In column A, "Exported" displays for every row that was exported and a System ID has been inserted in Column B. Column C is blank. The remaining columns contain the data in each record, with the field names displayed in row 1.

## Editing a Job

You can modify any import or export job that you have created, to change some of the settings or selections. When editing a job, you can also save the modified job with a new name, while preserving the settings and selections in the original job.

To edit an import or export job:

1. Start Importer. Click **Start → Enterprise Insight → Importer**.
2. Select **Edit** an existing Job.
3. Select the job name from the job list. Then click **Next**.
4. Enter your user ID and password.
5. Change any settings or selections in the dialog. Click Next to display each dialog and make changes. Refer to the online help files on Creating an Import Job for Excel, Creating an Import Job for a Database, and Creating an Export Job for more information on the dialogs.
6. Review your selections on the Summary page. Then click Save Job to save your changes
7. Click OK when you see the Job Saved message.

## Viewing the Log

The error log captures the status and error information that displays during an import or export, or when creating a worksheet. It contains details about unexpected conditions that occur and data errors, which may prevent data from loading properly. By default, the log is stored in the directory where Importer is installed in a file named Importer.log. The file only contains information about the most recent process. If you want to save a previous file version, save the log file with a new name before running the next import, export or workbook creation.

To view the Importer log:

1. Open a text editor or word processing application – for example, Notepad or WordPad.
2. From the File menu, choose Open.
3. Select the EIIImport.log file in the Importer folder and click Open.

### TIP

If you previously associated Notepad or WordPad with files that have a .log extension, you can double-click the EIIImport.log file to open it.

## Preparing for Import/Preparing for Export

Importer opens the workbook in which you have stored the data (when importing) and connects to the Enterprise Insight database.

The progress of each step appears – for example, Sorting Objects, Creating New Workbook, Opening Workbook, Connecting to Enterprise Insight System are some of the messages that display if you have entered valid information in the Importer window.

### Phase 1 - Validation (Import Log)

Importer examines and validates the data in every object that you selected and reports the number of new rows found. For example, “Asset (100 found)” means that you selected the Asset object to import new data from it, and 100 new rows of data were identified. “Carrier (0 found)” means that you selected the Carrier worksheet to import new data from it, but it includes no new rows of data. Importer determines

whether data is new or has been imported previously by examining Column A in the worksheet. If "imported" displays, the data in the row was previously imported into the Enterprise Insight database.

If an error is detected, the message "Error" displays, with a description of the error. For example, if a required field is missing from a row, the missing field name and the row are given. You can correct the error in the spreadsheet and then start the import again. Importer will not proceed past the validation phase if an error is found.

### **Phase 1 - Create Empty Worksheets (Export Log)**

Importer creates every worksheet needed based on the record types that you selected. In addition to worksheets for the objects you check, worksheets are created to store related data, such as items on document records you are exporting.

### **Phase 1 - Create Empty Worksheets (Create Workbook Log)**

Importer creates every worksheet needed based on the record types that you selected. In addition to worksheets for the objects you check, worksheets are created for supporting objects, which will be required when you import the data objects to Enterprise Insight.

### **Phase 2 - Import (Import Log)**

Importer attempts to import the data in each selected worksheet and reports how many rows were imported from each. For example, "Asset (99/100 imported)" means that 99 of 100 rows were successfully imported. "Warning – Save failed on Row 2" means that the data entered on row 2 in the Asset worksheet could not be imported, either because it already existed in the Enterprise Insight database or was not in the worksheet in the correct format.

### **Phase 2 - Export Data (Export Log)**

Importer attempts to export the data into each worksheet and reports how many rows were exported. For example, "Asset (99/100 exported)" means that 99 of 100 rows were successfully exported.

## **Summary**

When the process is completed successfully, the message "Import Successful," "Export Successful," or "Create Workbook Complete" appears, with a summary of the warnings and errors.

When an error is found in phase 1, the message "Import Aborted" appears, with a summary of the warnings and errors. A description of the errors can be found under the details for phases 1 and 2.

Click Close to close this dialog.

You can verify the results of the import by opening the Importer workbook. In column A, "Imported" displays for every row that was imported and a System ID has been inserted in Column B.

## **Running Importer from the Command Line**

You can execute an Importer job from the command line in order to run it in the background or schedule it to run automatically. The command line to run Importer must specify the Importer job name.

All other information that Importer needs is stored in the job – for example, your user name, password, Enterprise Insight database name, and the file that contains the data to import.

To run an Importer job from the command line, type:

```
EIImport -Job <jobname> --User <username> --Pwd <password>
```

You must specify the user and password on the command line. You cannot create a new workbook from the command line.