

Enterprise Asset Management System

First Steps

First Steps in the
Agile Enterprise Asset Management System





AgileAssets Inc.

Agile Enterprise Asset Management System

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1 INTRODUCTION

1.1 General and Target

This Enterprise Asset Management Guide is intended for end-users of the AgileAssets system. This system comprises 4 main modules and contains an extensive collection of asset data that can be retrieved easily.

1.2 Booklet Content

This First Steps guide has been developed for end users of the AgileAssets Infrastructure Asset Management system in order to facilitate the assimilation of this powerful system.

For more advanced and detailed information about specific modules, contact Alexander Shtein.

1.3 Common Booklet Icons

You'll find throughout this Guide some tips or bit of information that can be useful for you day to day use of the system. The following icons represent the following categories:

Icon	Definition
	Tip: can help you in your day to day use of the system by increasing or rendering certain tasks easier
<u>^</u>	Important: this marks an important information is being delivered and could explain certain aspects of the system



2 BASIC TERMS

2.1 Glossary

Term	Definition		
Environments	You can connect to different environments depending on your activities. For your day to day operations, you will use the production environment, also referred as PROD, and for training or testing purposes, you will use the development environment, also called DEV.		
Sessions	When you have logged in the system, a session is started. Upon login out, the session is completed.		
Modules	The AgileAssets Infrastructure Asset Management System is divided by area of competence, or "modules" such as Pavement, Safety, Bridges, and Trade-off.		
Menus	Inside each module, you access a specific area by navigating the Module's menu.		
Windows	Once you have identified the particular path to access the appropriate information, you use the menu to open the corresponding window		
Panes	Windows can be divided in several panes, which are in divisions of the windows		
Tabs	Windows can also be organized in tabular division, usually located at the top of the specific window, the information is divided by multiple screen, and you can jump from one to the other by clicking on the corresponding tab		
Icons	In the general system navigational window (left gutter), several commands can be trigger by clicking on specific icons – see Common Icons below)		
Right-clicks	In most windows, many commands and functionalities are accessible by right- click with the mouse. Upon right-clicking, a sub menu appears with available commands that can be activated by left-clicking		
Records	Row of data in the database corresponding to a row of data in a grid view, or a page of data in a form view.		

2.2 Common Icons

Icon Icon Name		Type of Action - Description	
8	Exit	Exits the application	
€	Retrieve	Retrieves data from the central database	
	Save	Saves data to the central database	
0	Help	Opens the context-based help	
7	Add Link	Adds a quick link to the window opened in the quick link pane	
x)	Remove Link	Removes a quick link from the quick link area in the gutter	
☆	Dashboard	Opens the dashboard window	



▲ □	Admin Unit	Opens the administrative unit selection window (note: might not be
		displayed if you have only access to one administrative unit only)
2	Links	Opens the links management window
?_	Management	
∷≣	Show Form	Opens a form view (1 record per screen) when you double click on
:=		this icon
i≡	Show Grid	Opens a grid view (as many records as possible on one screen - excel-
:=		like representation) when you double click on this icon
?	Filter On	Indicates that a filter is currently active on the window. A double
		click open the filter window
<<	First Page	Scrolls to the first page of data - only in Grid mode
<	Previous	Scrolls to the previous page of data – only in Grid mode
	Page	
2 Go	Go To	Scrolls to the nth page of data (where n is the number entered in the
		box) when you click on the Go icon- only in Grid mode
>	Next Page	Scrolls to the next page of data - only in Grid mode
>>	Last Page	Scrolls to the last page of data - only in Grid mode



3 RECOMMENDATIONS AND FAQS

3.1 Recommendations

The Fleet Management System is a versatile system that can be used from any computer with a browser and an internet connection.

However, for a better experience, it is recommended to have the following settings. These settings are only recommendations and do not imply that your experience will not be satisfactory if you use different settings.

Setting	Description
Browser	IE 6 or above
	Firefox 3.0 or above
Screen Resolution	1024 x 768
Memory	Windows XP: 512MB
	Windows Vista: 1GB minimum

3.1 FAQs

Below is a list of frequently asked questions.

Question	Answer		
What is the	The password needs to have at least 8 characters, with at least the following:		
Password Format?	- one uppercase character (A-Z)		
	- one lowercase character (a-z)		
	- one alphanumeric character (1-9)		
The system times	After 30 minutes of complete inactivity, the system will time out and will kill		
out when I do not	your session. If you haven't saved you data, it will be lost.		
anything, why?			
I haven't logged If you do not log in the system within a 90 days period, the system			
in the system in	UserID and you will not be able to log in. You should contact your agency		
the last 3 month	system administrator to get some help.		
and I cannot log			
in, why?			
I cannot	Your browser prevents you from downloading any content from the page you		
download some	are viewing. To allow the content download (excel file for example), you can		
data from a	follow these steps:		
window, what am	1. in your browser, go to Tools > Options. A dialog box opens		



I doing wrong?	2. Click on the Security tab.		
	3. Click on the button Custom Level		
	4. In the new pop-up, scroll down until you find the Download Category.		
	Replicate the setting as shown below:		
	Downloads Downloads		
	Automatic prompting for file downloads		
	O Disable		
	Enable		
	🛂 File download		
	O Disable		
	Enable		
	5. Click on OK		
	6. Click on OK, your browser returns to your main navigation window and		
	you should be able to download the content.		
I forgot my	You can use the Forgot your Password? functionality on the login screen. If you		
password, what	are not successful, you should contact to Agency System Administrator.		
am I supposed to			
do?			



4 SYSTEM LOG IN / LOG OUT CASES

4.1 System Log In

To log in, follow these steps

- **1.** Launch your Internet browser (Internet Explorer, Firefox, etc...).
- **2.** Type the URL below and press Enter. (Note that if this is the first time you are accessing the system, you should save this URL as a "favorite" to facilitate return visits)



3. In the log on window, type your user ID. (Note: If you have previously logged onto the system using this machine, the system will remember your user ID and so you will only need to enter your password), and then type your Password in the User Password. Click on Log In Icon



WARNING - RESTRICTED GOVERNMENT SYSTEM

This system is restricted to authorized users only. Unauthorized access, use, misuse or modification of this system, the data contained herein, or in transit to/from this system, may constitute a violation of federal, state and local laws and subject individual(s) to criminal and/or civil prosecution and penalties. This system and associated usage is subject to monitoring and security testing by authorized personnel. There is no expectation of privacy except as otherwise provided by applicable privacy laws.

Privacy and Security Policy



4. After clicking on Log In Icon, system checks the information you entered and, if recognized, logs you on to the system. If you are assigned to only one administrative unit, the system automatically selects this unit and displays the home window of the system. The log-on process is now complete.

On the other hand, if you are assigned to more than one administrative unit, the system displays a window to select your administrative unit. An example of this window is shown below.



Note: You are only allowed a specific number of attempts to log on within a certain time period. (The System Administrator sets the number of attempts and time period.) After the last unsuccessful attempt, you will be locked out of the system. You must contact the System Administrator to be allowed to log on to the system.

- 5. Click on the down arrow to display the administrative units, locate the desired unit, and then click on the desired unit. (Note that if you have previously logged onto the system, the system will remember the unit you last used and so you may skip this step.)
 - Note: The selection of an administrative unit is not important. At various points in the system, the phrase "use current" appears. The current unit is the unit you selected when you logged on. You may change the administrative unit at any time while logged on by clicking the icon. This displays the selection dialog box for administrative unit. You may then select a different administrative unit from those provided in the drop-down list.
- 6. Click Submit. You are now fully logged onto the system, and the system displays the home window of the application. This window shows your "dashboard." The dashboard is where up to four reports may be displayed for quick review. See the section on reports for more information about placing particular reports on the dashboard.
- 7. Congratulations, the log-on process is now complete.

4.2 Changing Passwords

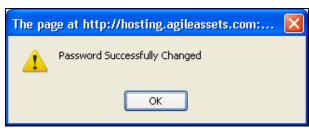
To change you password, follow these steps:

- 1. In any module, go to Utilities > Change Password.
- 2. Enter your current password, then your new password, and finally confirm the new password.





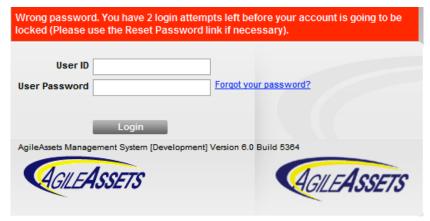
3. Click on the Change Password button.



4. Congratulations, you have changed your password.

4.3 Log In Faults

If the combination User ID/Password is not correct, the system displays the following. Re-enter the appropriate information.

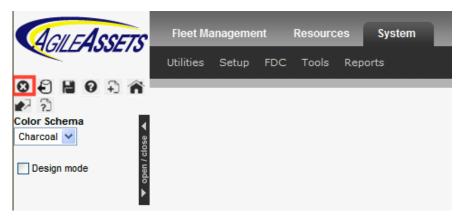


4.4 System Log Out

When you want to log out, follow these steps:

1. Click on the Exit icon . as shown below.

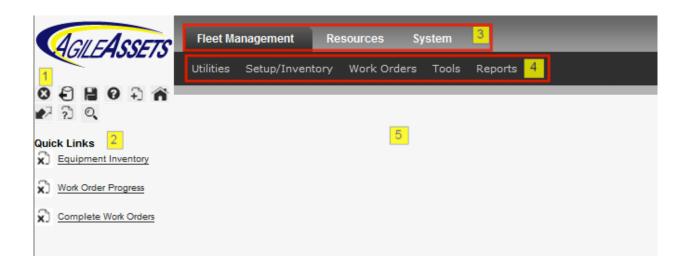




2. Congratulations, you have exited the application



5 SYSTEM AREAS





Depending on your access profile, you could see more or less modules and more or less menus than other people in your agencies with different access profiles.

Areas Name Definition		Definition	
Dashboard, Manage Links Once you have created link, they appear		General commands triggered by icons such as Exit, Save, Retrieve, Add Link, Dashboard, Manage Links	
		Once you have created link, they appear here. You can click on them to go directly to the corresponding window. They are module specific.	
3	Modules	Shows all the modules for which you have access. The active module is highlighted in blue. Click on a different module to access this module	
4	Menus	Menu of the active module selected in the Modules area. Point and click to navigate the menus.	
5	Window	In this area, all the information is displayed. It can be in a tabular form, graphical form, with several sub-windows (panes) or by tabs. When you click on a module, you'll find the module's dashboard in this area	

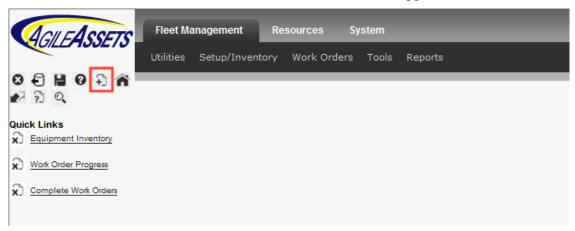


6 FAVORITES

6.1 Set favorites

To set favorites, follow these steps:

- 1. Open the window for which you to establish a favorite (or quick link)
- 2. Click on the Add Link icon , as shown below. The link appears in the Quick Link area

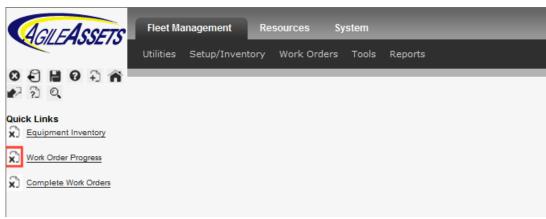


3. Congratulations, you have added a new favorite. Just click on it to access the window

6.2 Remove Favorites

To set favorites, follow these steps:

- 1. Locate the favorite you want to remove in the Quick Link area.
- 2. Click on the Remove Link icon , as shown below. The link disappears in the Quick Link area



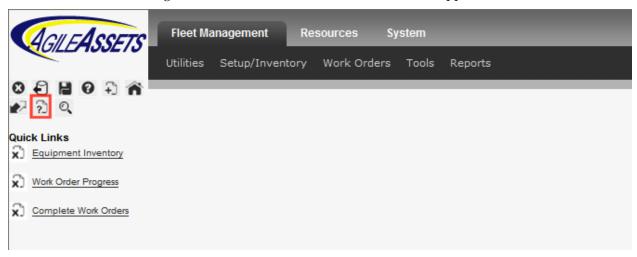
3. Congratulations, you have removed the undesirable favorite.



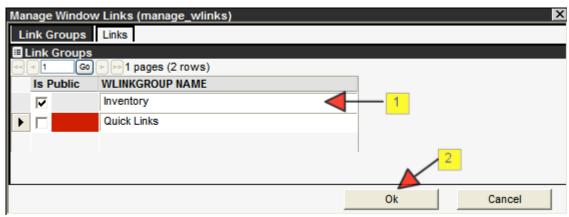
6.3 Public Favorites

Some favorites can have been grouped and have been made available for all to use. To see the Public Favorites, follow these steps:

1. Click on the Manage Links icon 2, as shown below. The link disappears in the Quick Link area



2. In the opened window, select the group of links you desire to use (see the Is Public checkbox?) by clicking once on the group. Once satisfied, click on the OK button.



3. Congratulations, you are now using the public favorites.



You can also organize your own favorites using the method above and clicking on the Links tab and changing the Order (after selecting the Quick Links group).



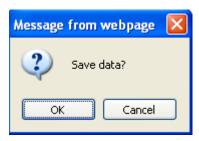
SYSTEM MESSAGES

During the use of the AgileAssets Infrastructure Asset Management System, you will be prompted by various system messages that will help to improve your experience. A few examples are shown below:

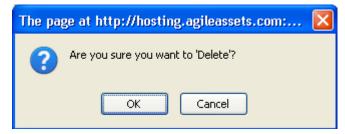
1. Messages that require an action are indicated by the icon ?



For example, you forgot to Save and are navigating away. You need to decide if you want to save or not.



For example, if you want to delete, the system asks you if you are sure.





- 2. Messages that show an information are indicated by the icon
 - For example are trying to retrieve too much information, the system is limited to only 10,000 records.





Right-click and select Filter to limit the number of records displayed in the window.

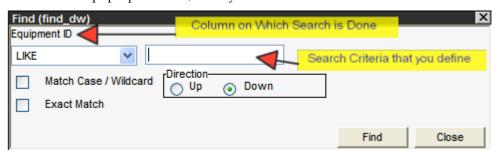


8 SEARCH

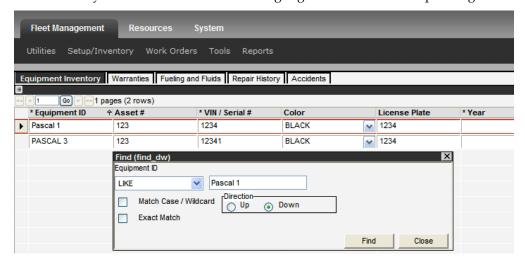
1. At any time, in any data window, you can do a search by right-click on the column you want to search and then click on the **Find** menu.



2. In the pop-up window, enter your search criteria then click on the Find button.



3. The system scans the column and highlights the record corresponding to the search criteria.



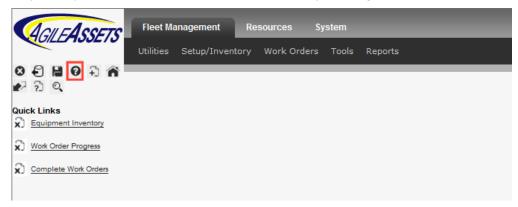


Click on the Find button to find the next record satisfying the search criteria.



9 HELP

1. At any time, you can click on the context-based help by clicking on the Help icon \odot .



2. The Help window opens in a separate browser and corresponds to the window you are seeking help for.



3. Congratulations, you have used the context-based help.



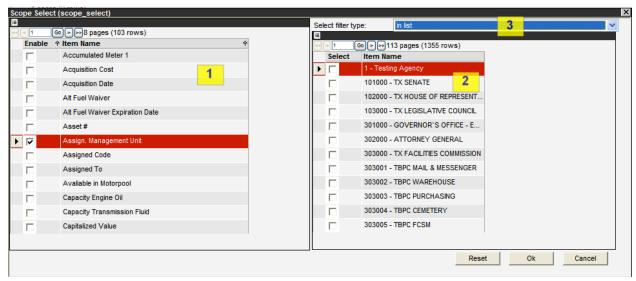
10 FILTERS

In all data windows, you can activate a filter in order to limit the number of records retrieved from the database and facilitate you navigation.

1. In all data windows, you can activate a filter by right-click and then select **Filter** such as below.

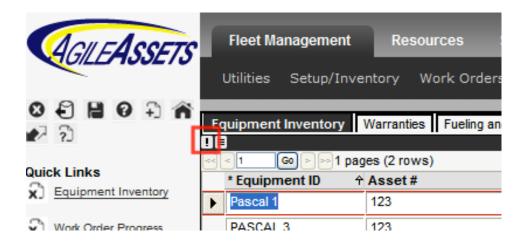


2. In the opened filter window, 1) select the item you want to establish a filter against, then 2) the filter type, and finally 3) the filter criteria.



3. Click on the OK button. The filter window closes and the data window refreshes to show the data corresponding to your filter. A small filter icon is added to the top left of the window pane indicating a filter is active.





4. Congratulations, you have activated a filter.



You can remove the filter by clicking on the Reset button in the filter window.



Depending on the data type selected in step 1 above, the filter type is different and so is the criteria. This window will probably look a bit different than the one shown here if the data type is a number or a string



When you set a filter, is it active active in all the windows that contain the same column (for example, the Route ID column is present in most data window).

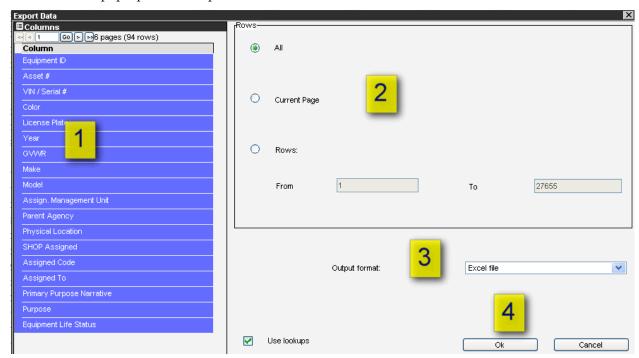


11 EXPORT

1. In all data windows, you can export data directly to an excel file by right-click and then select **Export Data** such as below:



2. A new pop-up window opens as shown below.



- **3.** In the columns pane, select all the columns you want to export (by default, all the columns are selected) by clicking on the columns you want (hold CTRL for multiple selection, or select the first one and hold SHIFT and click on the last one to select successive columns).
- **4.** In the Rows pane, select what you want to export:
 - If you want to export all the data in the pane, select All.
 - If you want to export only the current page of data, select Current Pane.
 - If you want to select a range of rows, select Rows and precise the From and To values.



- **5.** Select your output format (Excel, Comma Separated or HTML).
- 6. Click on OK.
- 7. Congratulations, you have exported some data to an excel file.



Be sure to use the **Filter** in order to limit the amount of data selected before you export. This will ensure a smooth export.



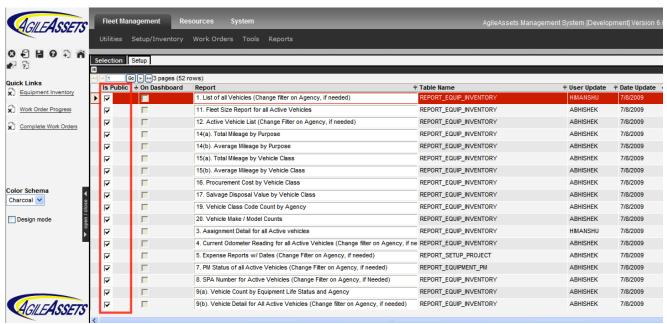
12 REPORTS

In each module, a reporting menu is provided (Reports). It contains 3 types of reports that you can use at any time:

- Standard Reports (Module > Reports > Tabular Reports)
- Graphical Reports (Module > Reports > Graph Reports)
- GIS Reports (Module > Reports > GIS Reports)

12.1 Public Reports

All the reports that are made available to all (public) are indicated by a mark in the "Is Public" check box in the lists of reports available. These reports can be reused, modified, or displayed at will.

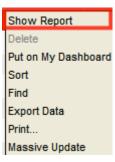


12.2 Display a Standard Report

To display a standard report:

- 1. Navigate to the Standard Reports window (Module > Reports > Tabular Reports).
- 2. Point to the existing report (public) you wish to view, right-click, and then click **Show Report**.





3. The system opens a new browser window and then displays the selected report (using the most recent data from the database) in the new window.



1. List of all Vehicles (Change filter on Agency, if needed) 7/22/2009 16:49:19

Equipment ID	Asset#	VIN / Serial #	Equipment Description	Vehicle Class	Year Parent Agency
			AUTOMOBILES SEDAN 113 IN. WHEELBASE	701 - PASSENGER CARS	1,995 60 1000 - DEPARTMENT OF TRANSPORTATION 6
			AUTOMOBILES SEDAN 113 IN. WHEELBASE	701 - PASSENGER CARS	1,996 60 1000 - DEPARTMENT OF TRANSPORTATION 6
60100100114D	00114D	2FALP72W2TX174800	AUTOMOBILES SEDAN 113 IN. WHEELBASE	701 - PASSENGER CARS	1,996 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100115D	00115D	2FALP72W4TX174801	AUTOMOBILES SEDAN 113 IN, WHEELBASE	701 - PASSENGER CARS	1,996 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100116D	00116D	1FALP52U9TG238453	AUTOMOBILES SEDAN 100 THRU 112.9 IN.	701 - PASSENGER CARS	1,996 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100117D	00117D	1FALP52U9TG238454	AUTOMOBILES SEDAN 100 THRU 112.9 IN.	701 - PASSENGER CARS	1,996 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100120D	00120D	2FALP72W9TX174793	AUTOMOBILES SEDAN 113 IN. WHEELBASE	701 - PASSENGER CARS	1,996 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100121D	00121D	2FALP72W0TX174794	AUTOMOBILES SEDAN 113 IN. WHEELBASE	701 - PASSENGER CARS	1,996 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100122D	00122D	1FALP72W2TX174795	AUTOMOBILES SEDAN 113 IN. WHEELBASE	701 - PASSENGER CARS	1,996 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100123D	00123D	2FALP72W4TX174796	AUTOMOBILES SEDAN 113 IN. WHEELBASE	701 - PASSENGER CARS	1,996 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100124D	00124D	2FALP72W6TX174797	AUTOMOBILES SEDAN 113 IN. WHEELBASE	701 - PASSENGER CARS	1,996 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100232D	00232D	2G1WL52MXW9236242	AUTOMOBILES SEDAN 100 THRU 112.9 IN.	701 - PASSENGER CARS	1,998 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100233D	00233D	2G1WL52M5W9235595	AUTOMOBILES SEDAN 100 THRU 112.9 IN.	701 - PASSENGER CARS	1,998 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100316D	00316D	2B3HD46RXXH786627	AUTOMOBILES SEDAN 113 IN. WHEELBASE	701 - PASSENGER CARS	1,999 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100317D	00317D	2B3HD46R1XH786628	AUTOMOBILES SEDAN 113 IN. WHEELBASE	701 - PASSENGER CARS	1,999 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100318D	00318D	2B3HD46R3XH786629	AUTOMOBILES SEDAN 113 IN. WHEELBASE	701 - PASSENGER CARS	1,999 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100319D	00319D	2B3HD46RXXH786630	AUTOMOBILES SEDAN 113 IN. WHEELBASE	701 - PASSENGER CARS	1,999 601000 - DEPARTMENT OF TRANSPORTATION 6
60100100406D	00406D	1G1ND52J91M634231	AUTOMOBILES SEDAN 100 THRU 112.9 IN.	701 - PASSENGER CARS	2,001 601000 - DEPARTMENT OF TRANSPORTATION 6

4. Congratulations, you have published a tabular report.



The table in this window shows existing reports and notes whether they are available to all (A checkmark in the Is Public column indicates that a report is available to all). This table also contains reports entitled "New Report from." These are templates for creating new reports from the table indicated in the Table Name column.



You can copy/paste the content of your report in Excel, by selecting all the data first (CTRL + A) then copy (CTRL + C) then open Excel and paste the data (CTRL + V).

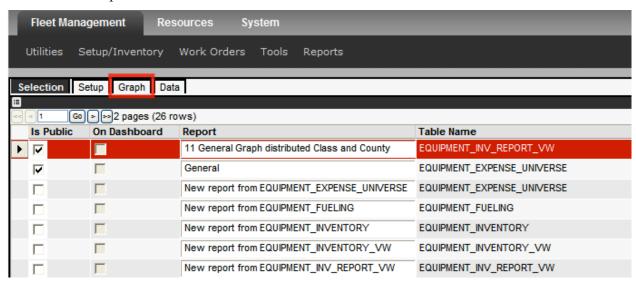


If is likely an existing report contains the data you want. It is easy to modify the Filter of an existing report to accommodate your needs. You can also then save this report to make your own.

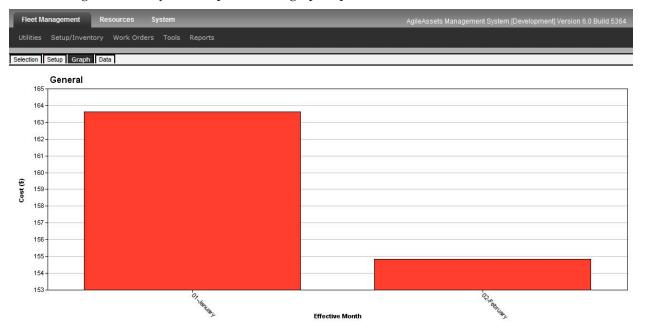


12.3 Display a Graph Report

- 1. Navigate to the Graph Reports window (Module > Reports > Graph Reports).
- 2. Point to the existing report (public) you wish to view.
- **3.** Click the Graph tab.



4. Congratulations, you have published a graph report.





If you would like to print the graph, point to the graph with your mouse, right-click, and then click **Print**. This displays the graph (and only the graph) in a new window. You may then use the browser print command (File > Print) to print the graph.

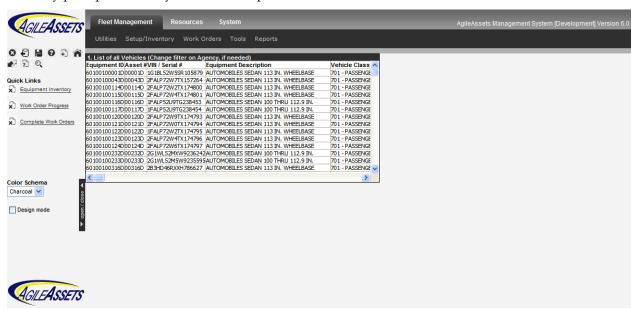


12.4 Dashboard

The dashboard is the first screen that is displayed when you log on to the system or when you select a new module. Each module has its own dashboard, and each report occupies one-quarter of the window.

You can access the dashboard at any time by clicking on the left gutter icon .

You may put up to four of your favorite reports on the "dashboard."



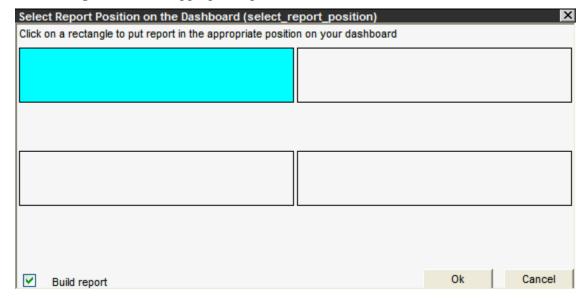
To put a report on a module's dashboard, follow these steps:

1. In the list of reports (Tabular, Graph, or GIS), locate the report you wish to place on the dashboard. Right-click the row showing this report and then click **Put On My Dashboard**.





2. In the dialog box, click the appropriate quadrant and then click **OK**.





On your Dashboard, you may view a report "full size" by double-clicking the title bar for the report. Double-clicking the title bar will restore it to its original, one-quarter size.



You may replace an existing report on your dashboard by putting the new report "on top of" the existing report.



You can remove an existing report on your dashboard by Right-click the quadrant showing the report to be removed and then click **Delete Report**