Expense Management
Cable Management Module

User Guide

NEC NEC Corporation

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Introduction

The *Expense Management Cable Management Module User Guide* provides the information you need to manage the cables in your organization.

Chapter Topics
- *Cable Management Overview*
- *How This Guide is Organized*

Cable Management Overview

The Cable Management Module is a tool that enables you to manage the cables in your organization, including their locations and connections.

With the Cable Management Module, you can:

- Integrate location data (building, room, and floor) from the Cable Management Module into the Edit Device dialog box.
- Integrate location data (building, room, and floor) from the Cable Management Module into the Ticket dialog box of the Help Desk module.

How This Guide is Organized

Chapter 1
Introduction

This chapter outlines how to use the manual including the organization and chapter layout of the *Expense Management Cable Management Module User Guide*.

Chapter 2
Getting Started

This chapter introduces you to the Cable Management Module basics.

Chapter 3
User Defined Fields

This chapter introduces you user defined fields, their applications and descriptions.

Chapter 4
Managing Cables

This chapter explains cable identification, location, and status data, along with additional information on specific cable management fields.

Chapter 5
Administration

This chapter introduces you to tasks associated with the Administrative sub-module.

Chapter 6
Reports

This chapter describes report types, specific parameters, and report output options for the Cable Management Module.

Chapter 7
Integration with other Modules of Application Suite

This chapter details Cable Management Module integration with other modules of the Application Suite.

2

Getting Started

This chapter introduces you to the Cable Management Module basics, including how to access the module, the Cable Management main window and navigation.

Chapter Topics
- *Accessing the Cable Management Module*
- *Cable Management Main Window*

Accessing the Cable Management Module

From the Module Selection Bar of the Application Suite window, select the CM tab, see Figure 2-1 .

Figure 2-1 *Module Selection Bar*

| My Portal	Reports	Org Utilities	Activity	Rating	Maintenance	CM

Cable Management Main Window

The Cable Management main window is composed of following two parts as shown in Figure 2-2:

- **Navigation pane** on the left hand side of the window
- **Grid pane** on the right hand side of the window

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Figure 2-2 *Cable Management Main Window Panes*
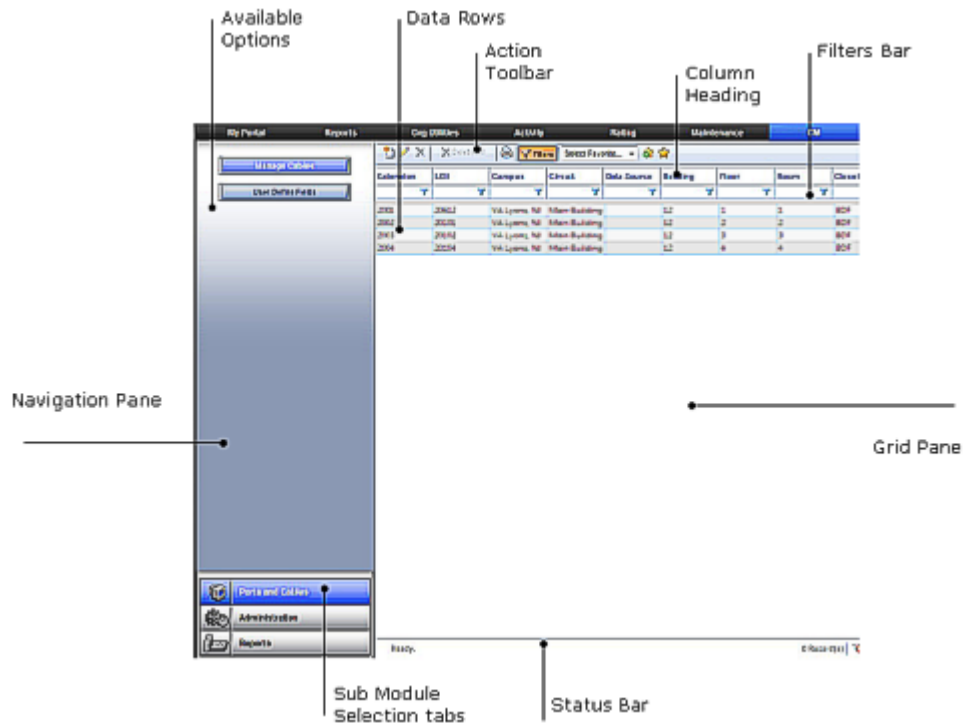
Navigation Pane

At the bottom of the navigation pane, you will find the sub-module selection tabs. The upper part of the navigation pane displays the options available for the selected sub-module.

Grid Pane

The grid pane on the right hand side of the window displays data and toolbars appropriate to the option selected. For the **Ports and Cables** sub-module, this area contains the cables' grid which is composed of the following parts:

- Action toolbar - contains the currently available tools and action
- Column Heading bar - each column represents one data field of the current cable
- Filters bar - where you define filters
- Data rows - each row represents one data record
- Status Bar - displays current status, paging information, and some additional action buttons

Sorting Grid Records

In the cables' grid, you can sort the displayed cables by any of the columns, but only by one column at a time. A small triangle in the column heading indicates the sort field and sort order. Follow the steps below to sort grid records.

— Click in a column heading to sort by that column.

— The first time you click in the column heading, it is sorted by ascending order. A small triangle ▲ in the column heading indicates the sort order.

— To reverse the sort order, click in the column heading again. The small triangle is reversed ▼ indicating descending sort order.

Filtering Grid Records

By setting filtering conditions, filtering enables you to display only records that match the defined filter fields. If more than one filter field is defined, only records matching all non-empty filter fields are displayed. To filter cable records, perform the following steps.

Step 1   If the filter bar is not shown, right-click any of the column headings and select filter bar, or click **Filters** ▽ Filters on the action toolbar.

Step 2   In a column to which you wish to apply a filter, click the filter icon ▽

and select from the popup menu the appropriate relation for the filter.

Step 3   Click in the filter cell (not on the icon).   A value entering text box opens.

Step 4   Enter the appropriate value.

Step 5   To activate all currently set filters now, press **Enter**, or wait until all filters are set and then activate all set filters at once in Step 7.

Step 6   Repeat steps 2 to 5 for each column to which you wish to apply a filter.

Step 7   To activate all set filters, click any of the filter icons in the filters bar and select **Apply All Filters**.

The new selection is displayed. The paging information and tools on the status bar reflect the results of applying the filters as shown in *Filtering Results*.

Figure 2-3 *Filtering Results*
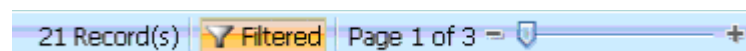
Managing the Displayed Columns

You can control which columns to show and their order. However, this setting is not saved and is valid only for the current display.

Hiding Columns

To hide one column from the display, right-click the heading of the column you wish to hide and select **Remove This Column** from the popup menu.

Selecting the Displayed Column

To select the displayed columns, do the following.

Step 1   Right-click anywhere in the column heading row and select **Select Columns** from the popup menu.

A second popup menu opens with all the available columns displayed.

Step 2   Click next to each column's name to alternately check or uncheck that column.

Step 3   Once all columns are checked or unchecked to suit your needs, select **Apply Changes** from the second popup menu.

Displaying All Columns

To display all columns, do the following.

Step 1   Right-click anywhere in the column heading row and select **Select Columns** from the popup menu.

Step 2   Select **Reset** from the second popup menu.

Changing Column Order

The order the columns appear on the Cable Management main window can be changed by following the steps below.

Step 1   Drag a column heading to another place in the column heading row until the border between two adjacent column headings becomes bold.

Step 2   Drop the column heading in its new place.

Managing Favorites

Favorites enable you to assign a name and save the current filter and column setting so that you can use them again whenever you need them.
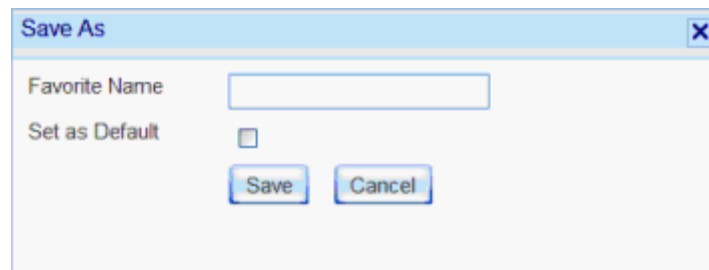
Saving a Current Setting as a Favorite

To save the current setting as a favorite, do the following.

Step 1   Set the filter and column setting and activate it to ensure the setting is correct.

Step 2   In the action toolbar, click **Add to Favorites** . Figure 2-4 displays.

Figure 2-4 *Saving Favorites*

Step 3   In the **Save As** dialog box, type a name for this favorite filters setting. If you wish to make it your default filters setting, check the **Set as Default** check box.
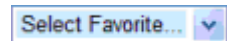
Step 4   Click **Save**.

The new setting is saved to your favorites list.

Using a Favorite Filter Setting

To use a favorite filter setting, do the following.

Step 1   In the action toobar, open the **Select Favorite.......** drop-down list.

Step 2   Select the desired filter. The selected setting is applied.

Organizing Favorites List

Favorite lists can be organized to suit your preferences. Favorites can be deleted, edited, or switched to another favorite. To organize favorites, do the following:

Step 1   In the action toolbar, click **Organize Favorites** ⭐ .

Step 2   In the Organize Favorites dialog box do one of the following:

—To delete a favorite, click in the favorite row to select it, then click

delete ✕ .

—To edit a favorite, click in the favorite row to select it, and then click

Edit 🖊 .

—To change the default favorite, check or uncheck the default check box. There can be only one default favorite.

Step 3   Close the **Organize Favorites** dialog box.

3

User Defined Fields

Chapter Topics • *User Defined Fields Applications*

User Defined Fields Applications

User defined fields enable you to adjust the Cable Management Module to your organization's needs. Up to 20 potential user defined fields exist. The field names in the database are **Info1** through **Info20**. You cannot add or delete user defined fields or change their names. However, in order to use these "raw" fields, you have to make them **visible** and define their properties to suit your needs; otherwise they remain **invisible** and cannot be used.

Editing User Defined Fields

To make the fields visible and define their properties, perform the following steps.

Step 1 Select **Ports and Cables** from the sub-module selection tabs.

Step 2 Select **User Defined Fields** in the available options area. Figure 3-1 displays.

Figure 3-1   *User Defined Info Fields Grid*

> **Step 3**   For each field you wish to define, complete the datafill as described in Table 3-1, "User Defined Fields - Datafill" on page 2.
>
> **Step 4**   Click **Save** to save changes.

User Defined Field Descriptions

Table 3-1 provides the User Defined Fields and a brief description.

Table 3-1   *User Defined Fields - Datafill*

Field	Description
Visible	To use an info field you must make it **visible** by checking this check box. Visible fields have appropriate data entry boxes in the Cable dialog box and may be shown in the cables' grid. Uncheck this check box to make the field **invisible**. The system behaves as if the field doesn't exist, but any information already stored in the field is not discarded. When this field is made visible again, information is available.
Name	The name of the field in the database. You cannot change this name.
Label	The field's label in the user interface.
Type	Select the desired type from the drop-down menu.
	Text Text fields can hold up to 50 characters of free text.

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Field	Description
Option List	Select Option List to define a closed set of pre-defined values for the field. In the Cable dialog box, these values will be available for selection from a drop-down list.
	To define the available options:
	• Click Edit [icon] next to the options list.
	• In the upper text box of the List Editor dialog box, enter a value and press the Enter key or click New [icon] to transfer it to the list below.
	• Repeat the previous step for each predefined optional value.
	• To delete a value, select it and then click Delete [icon] .
	• When done, click **OK**.
Checkbox	Select **Checkbox** to define a true/false field.
Mandatory	For Info fields of type **Text** and **Option List**, check this box to make the field mandatory and uncheck it to make the field optional.
	For Info fields of type **Checkbox**, this field is not relevant.
Default Value	Define the default value of the field.
Group	Define a group name
	All fields with the same group names appear in the dialog box together under the heading of this group name. **Optional**
Show in Manage Cables	Display this field in the cable's grid.

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Managing Cables

This chapter explains cable identification, location, and status data, along with additional information on specific cable management fields.

Chapter Topics • *Cable Data*

Cable Data

Once the Info fields are defined, you can begin entering or importing cable data. Cable details include:

- Cable Identification Data - extension, LEN, campus, circuit, data source, pair
- Physical Location Data - building, floor, room, closet, jack
- Status Information - jack status, pair status, DID
- Additional info - up to 20 cable management specific fields (see *User Defined Fields*).

To open the cable management grid, under the sub-module selection tab, select **Ports and Cables**. The cable's grid opens, Figure 4-1.

Figure 4-1 Cable Grid

Adding a New Cable

To add a new cable, do the following.

Step 1 In the cable management grid, click **Add** in the action toolbar. Figure 4-2 displays.

Figure 4-2 Cable Dialog Box

Step 2 Datafill the fields. Table 4-1 provides a description of each field.

Step 3 When done, click **Save** to save the cable

    OR

Click Save & New [icon] to save the cable and continue adding new cables.

Viewing and Editing a Cable

Viewing and editing cables can be done in the Cable Management main window.   To edit a cable, do the following.

Step 1   Select a cable and then click **Edit** [icon] in the action toolbar.

OR

Right-click any cable's data row and select **Edit Cable** from the popup menu.

OR

Double-click on a cable.

—The **Edit Cable** dialog box opens.

Step 2   Edit the cable fields.

Step 3   When done, do one of the following:

—Click **Save** [icon] to save the cable.

—Click **Save & New** [icon] to save the cable and continue editing cables.

Deleting a Cable

Perform the procedure below to delete a cable.

Step 1   In the cables' main window, do one of the following

—Select a cable and then click **Delete** [icon] in the action toolbar.

OR

—Right-click any cable's data row and select **Delete Cable** from the popup menu.

Step 2   In the Delete Confirmation dialog box, select [Yes] .

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Deleting all Cables

NOTE   *Only the administrator can use the **Delete All** functionality.*

**Step 1**   In the cable's main window, select a cable and then click [Delete All]   in the action toolbar.

Step 2   In the Delete Confirmation dialog box, select [Yes] .

Table 4-1 *Cable Fields*

Field		Description
Extension	*0	The extension currently active through the cable. Select an extension from the drop-down list of all extensions. This field is used to integrate the Cable Management Module with Devices and Work Orders.
LEN	*0	Identification of the Local Exchange Node.
		Note: *At least one of the field's Extension, LEN, or Pair must be defined.*
Campus	0	The campus where this cable is installed.
Circuit	0	The circuit for this cable.
Closet	0	The cable's closet.
Building	0	Describing the physical location of the cable socket.
Floor	0	Describing the physical location of the cable socket.
Room	0	Describing the physical location of the cable socket.
Jack	0	Identification of the cable's jack.
Pair	*0	Identification of the pair connected to the cable. Pair ID must be unique.
Pair Status	0	Select from the drop-down list: **Available**, **Used**, **N/A**, or **Other**.
DID	0	The external dialing number to the extension.
Comments	M	Any free text.

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Administration

This chapter introduces you to tasks associated with the Administration sub-module.

Chapter Topics
- *Administration - Introduction*
- *Importing and Exporting Files*

Administration - Introduction

The Administration sub-module enables you to export and import cable files and to backup and restore from backup.

Importing and Exporting Files

You can export and import to comma delimited files (CSV files).

Importing Cables From a File

Import is done from a file on your local computer. To import cables, do the following.

Step 1   In the sub-module selection tabs, select **Administration**.

*Step 2*   In the Option Selection area, select **Import**. The Import Cables dialog box, Figure 5-1 displays.

Figure 5-1 *Import Cables Dialog Box*

Step 3   Enter the full path name or click **Browse**... and select the file.

The file must confirm to the cable management structure:

- The Header record and the number of fields in each record must match the cable record.
- At least one of the field's **Extension**, **LEN**, and **Pair** must be defined.
- The pair field must be unique.

Step 4   Click [Import].

Step 5   A dialog box suggesting to backup the data before executing the import displays. Click [Yes] to backup.

Step 6   Click [Import] .

Step 7   When the import is finished, the system displays one of the following messages:

- "Import Cables finished successfully." Click **OK** to continue.
- "Import Cables finished with errors. Please see logs for details." Click the Log File link to see the errors found in the file. When finished, click **OK**.
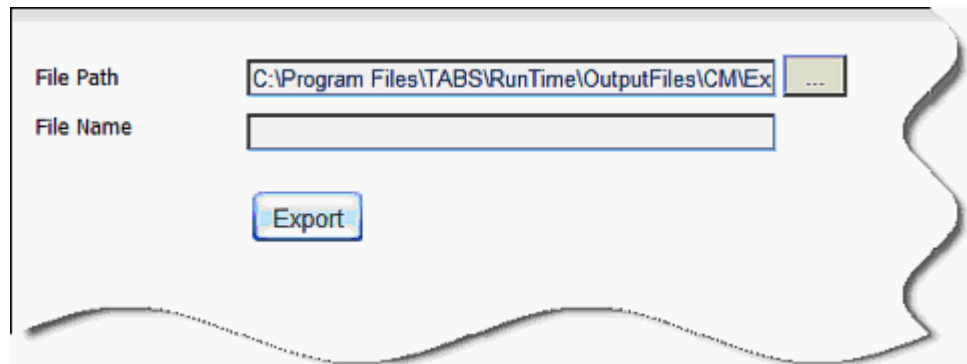
Exporting Cables into a File

Export is done to a file on the server.

Step 1   In the sub-module selection tabs, select **Administration**.

Step 2   In the Option Selection area, select **Export**. The **Export Cables** dialog box displays, Figure 5-2.

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Figure 5-2 *Export Cables Dialog Box*
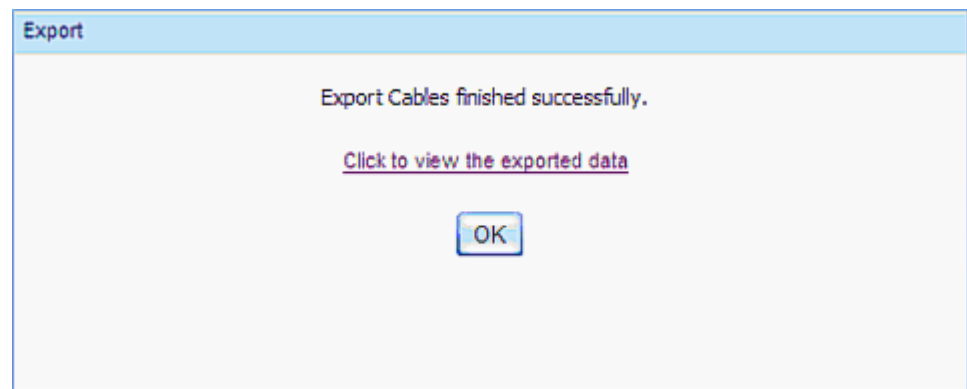

Step 3   Click **Browse**....and select the appropriate directory on the server.

Step 4   Enter a file name. The file suffix must be CSV.

Step 5   Click   Export   .

Step 6   When the export is finished, the Export Finished dialog box, Figure 5-3 displays.

Figure 5-3 *Export Finished Dialog Box*

Step 7   Click the link to view the exported data or click **OK** to continue.

Backing Up and Restoring Cables

To backup and restore cables, perform the following procedure.

Step 1   In the sub-module selection tabs, select **Administration**.

Step 2   In the Option Selection area, select **Management**. A grid showing existing backups of cables displays.

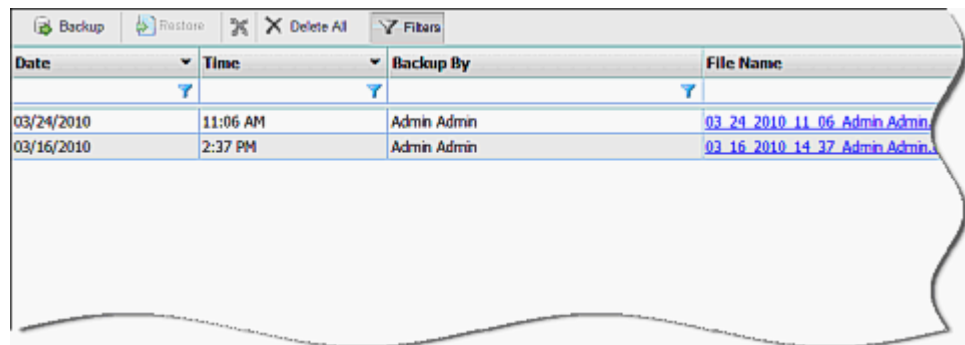*Step 3*   In the cable backup grid (Figure 5-4) you can:

- Create a new backup by clicking **Backup** 🔲 Backup .

- Delete an existing backup by clicking **Delete** or **Delete All**.

- Restore cable data from a specific backup. Select a backup row and

  click **Restore** 🔲 Restore .

- View a specific backup by clicking the backup name.

Figure 5-4 *Backup Grid*

6

Reports

This chapter describes report types, specific parameters and report output options for the Cable Management Module.

Chapter Topics   • *Reports - Introduction*

Reports - Introduction

The Cable Management Module includes six report types (described in Table 6-1). You can view the output using the following methods:

- Viewing on screen
- Sending it to a printer
- Sending it as an e-mail attachment in one of the following formats:
  — MS Word document (DOC)
  — MS Excel document (XLS)
  — Portable document (PDF)

Table 6-1 *Available Reports*

Report Name	Description
Available Jacks	Lists the available jacks grouped by the selected **Group By** field.
Available Pairs	Lists the available pairs grouped by the selected **Group By** field.
Jacks by Status	Lists all jacks with the selected status.
Pairs by Status	Lists all pairs with the selected status.
List of Extensions	Lists all extensions with the requested data.
Duplicate Entities	Lists duplicate entities of the checked entity types.

Generating a Report

To generate a report, do the following.

Step 1   In the sub-module selection tabs, select **Reports**.

Step 2   In the Option Selection area, select the desired report. (See Table 6-1).

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The relevant Report dialog box displays. Each report has a slightly different dialog box. Figure 6-1 is an example of the Duplicate Entities dialog box.

Figure 6-1 *Duplicate Entities Dialog Box*

Step 3   Supply the report specific parameters as described in Table 6-2.

Step 4   Select Send **Output to** options and supply the required additional parameters as described in Table 6-3.

Step 5   Click Execute .

Table 6-2 *Report Specific Parameters*

Report Name	Parameter Name	Description
Available Jacks	Group By	Select how to group the list of jacks from: • Campus • Circuit • Building • Floor • Room

Report Name	Parameter Name	Description
Available Pairs	Group By	Select how to group the list of pairs from: • Campus • Circuit • Building • Room
Jacks by Status	Filter By	Select how to filter the list of jacks from: • All - no selection • Available • Used • Broken • N/A • Other
Pairs by Status	Filter By	Select how to filter the list of pairs from: • All - no selection • Available • Used • Broken • N/A • Other
List of Extensions	Group By	Select how to group the list of extensions from: • Campus • Circuit • Building • Floor • Room
Duplicate Entities	Duplicate Entities	Select which type of duplicate entities to include in the report: • Extension • LEN • Jack • Circuit - Pair

Table 6-3 *Send Output To - Options*

Send Output to	Parameter Name	Description
Screen		Sends the generated report to your screen.
E-mail		Sends the generated report as an e-mail attachment to the supplied address.
	E-Mail Address	Supply the e-mail address to send the report to.

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Send Output to	Parameter Name	Description
	Output Format	Select one of the following formats: • MS Word document (DOC) • MS Excel worksheet (XLS) • Portable document (PDF)
Printer		Sends the generated report to the specified printer.
	Select Printer	Select a printer form the drop-down list.

7

Integration with other Modules of Application Suite

The Cable Management Module supports integration with other modules of the Application Suite.

Chapter Topics
- *Integration - Introduction*
- *Integration with Devices*
- *Integration with Tickets*

Integration - Introduction

Once the Cable Management is installed, it is integrated with the Application Suite database in two places.

- In the device dialog box of the Org Utilities module
- In the new ticket dialog box of the Help Desk module

The integration is based on matching the extension field.

Integration with Devices

In the Device dialog box, if the device matches an extension number in the Cable Management Module, then:

- A **Cable Information** link on the device dialog box enables you to access the cable dialog box directly from the device.
- The information displayed in the fields **Building**, **Room**, and **Floor** are taken from the cable management. Figure 7-1 provides an example.

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Figure 7-1 *Device Integration*

Integration with Tickets

In the Ticket dialog box of the Help Desk module, if the field
Extension/Resource matches an extension in the Cable Management
Module, then:

- A cable information link on the Ticket dialog box enables you to access
  the Cable dialog box directly from the Ticket.
- The information displayed in the fields **Building**, **Room**, **Floor**, **Pair**,
  and **Jack** are taken from the cable management. Figure 7-2 provides
  an example.

Figure 7-2 *Ticket Integration*

For additional information or support on this NEC Corporation product, contact your NEC Corporation representative.

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