

Methods of Adding Assets

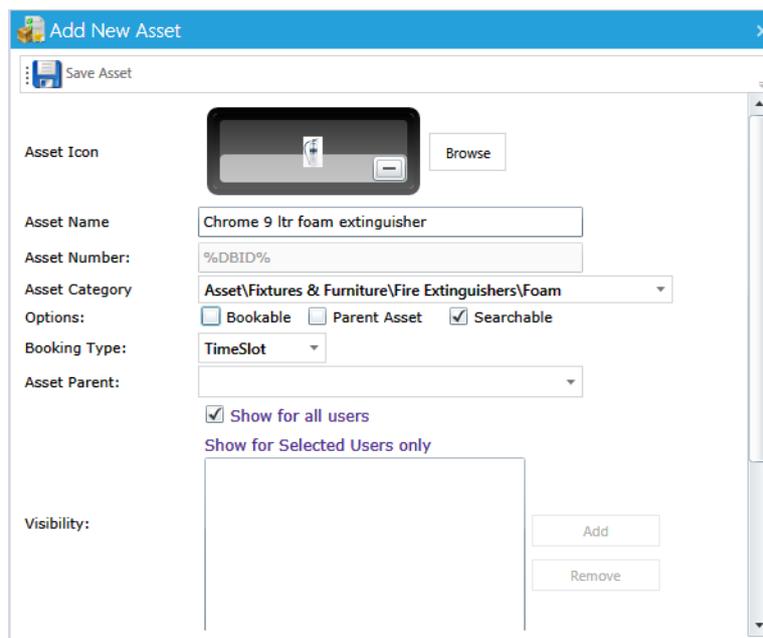
Asset Manager enables you to use a number of methods to add assets to its database. You can add assets manually one at a time, filling in all of the asset fields as you go. Whilst this is a useful feature, you would not wish to input hundreds of assets manually using this method.

Asset registers are commonly created and stored in Access databases or Excel spreadsheets. To enable you to import such existing records, Asset Manager can import multiple assets directly from CSV files.

Finally, Asset Manager's automatic network discovery mode will interrogate any device it finds attached to your network. This powerful feature is a great timesaver, and is at the heart of the system. We will describe this method in a separate application note.

Manual

To add assets manually, you will need to navigate to and select the asset category that you want the new asset to be added to, and then click the *Add Asset* button in the toolbar. At this point you can start entering the asset's default details.



The screenshot shows the 'Add New Asset' dialog box with the following fields and values:

- Asset Icon:** A placeholder image with a 'Browse' button.
- Asset Name:** Chrome 9 ltr foam extinguisher
- Asset Number:** %DBID%
- Asset Category:** Asset\Fixtures & Furniture\Fire Extinguishers\Foam
- Options:** Bookable (unchecked), Parent Asset (unchecked), Searchable (checked)
- Booking Type:** TimeSlot
- Asset Parent:** (empty dropdown)
- Visibility:** Show for all users, Show for Selected Users only

Buttons: Add, Remove

When these are saved, you can go into the asset directly and make changes to each asset field as appropriate. As you can probably gather, this process is only really suitable when adding one or two assets at a time. If you have lots of assets to add you should use the CSV method: it is quicker, and it has the ability to import data into your asset fields directly.

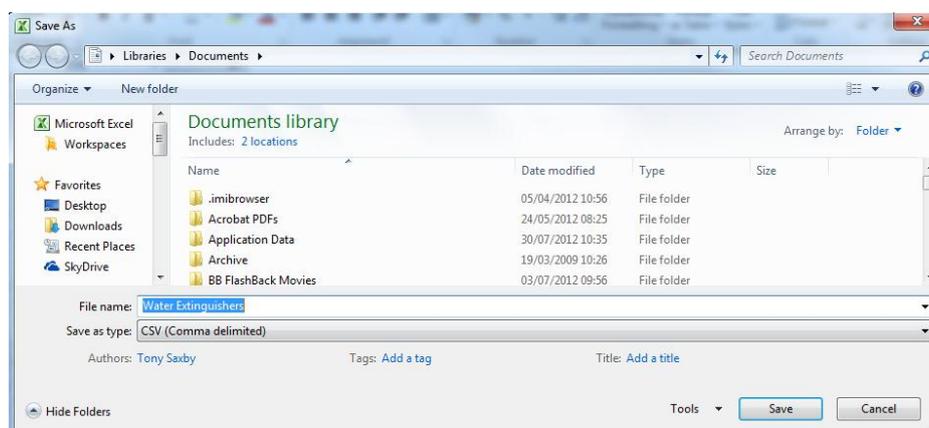
Importing via CSV file

Many organisations keep records in the form of spreadsheets. These are easy to create and update, but one major problem is that they must usually be editable and accessible by those who might need access to the data recorded against each item.

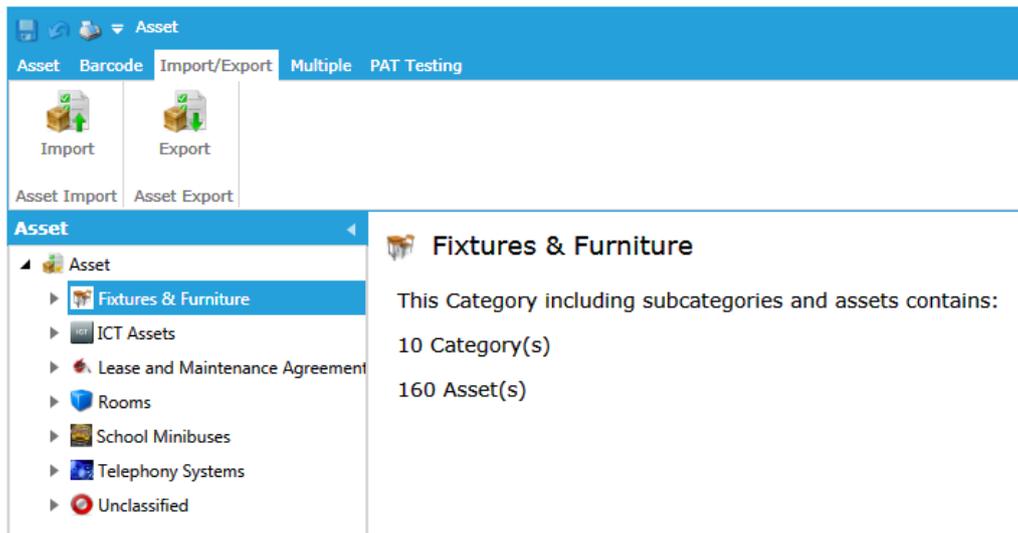
Take for example the case of fire extinguishers. These are a critical safety component that has to be maintained regularly, and the records might need to be examined at a moment's notice during a fire inspection. Whilst you might not think of adding your fire extinguisher assets into a database such as this, you can probably see how this helps you to meet the objectives of providing central record keeping and providing almost instant access when needed.

	A	B	C	D	E	F	G	H	I
1	Serial	Name	Model	Expiry	Maintained by	Location	Status	purchase date	cost
2	1265166	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Hall	OK	24/11/2011	148
3	1265178	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Hall	OK	24/11/2011	148
4	1265190	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Kitchen	OK	24/11/2011	148
5	1265202	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Main Office	OK	24/11/2011	148
6	1265214	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Entrance Hall	OK	24/11/2011	148
7	1265226	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Corridor A	OK	24/11/2011	148
8	1265238	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Corridor B	OK	24/11/2011	148
9	1265250	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Corridor C	OK	24/11/2011	148
10	1265262	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Corridor D	OK	24/11/2011	148
11	1265274	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Corridor E	OK	24/11/2011	148
12	1265286	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Corridor F	OK	24/11/2011	148
13	1265298	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Technology A6	OK	24/11/2011	148
14	1265310	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Technology A7	OK	24/11/2011	148
15	1265322	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Sports Hall A	OK	24/11/2011	148
16	1265334	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Sports Hall B	OK	24/11/2011	148
17	1265346	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Swimming Pool	OK	24/11/2011	148
18	1265358	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Room 7	OK	24/11/2011	148
19	1265370	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Room 9	OK	24/11/2011	148
20	1265382	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Room 13	OK	24/11/2011	148
21	1265394	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Room 14	OK	24/11/2011	148
22	1265406	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Room 15	OK	24/11/2011	148
23	1265418	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Room 16	OK	24/11/2011	148
24	1265430	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Room 22	OK	24/11/2011	148
25	1265442	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Room 23	OK	24/11/2011	148
26	1265454	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Room 31	OK	24/11/2011	148
27	1265466	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Room 42	OK	24/11/2011	148
28	1265478	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Room 210	OK	24/11/2011	148
29	1265490	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Room 211	OK	24/11/2011	148

A typical spreadsheet might look something like this. In order to import the data contained in the spreadsheet, we first need to save it in the CSV file format. Use the Save As feature and select CSV (comma delimited).



Once you have your CSV file, you can move on to the import procedure within Asset Manager. Select *Import/Export* from the ribbon menu.



Clicking the *Import* button starts the Import Asset from CSV wizard. There are four easy steps to follow.

Step one is to load the CSV file: simply browse, select and open the file. The contents of the CSV file are read into the system and displayed in tabular format. You can quickly ascertain that the dataset is correct by scrolling down through the table.

STEP 1: Browse to the csv file containing the assets to import

Water Extinguishers.csv Browse

Serial_	Name	Model	Expiry	Maintained_by	Location	Status	purchase_date	cost
1265166	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Hall	OK	24/11/2011	148
1265178	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Hall	OK	24/11/2011	148
1265190	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Kitchen	OK	24/11/2011	148
1265202	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Main Office	OK	24/11/2011	148
1265214	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Entrance Hall	OK	24/11/2011	148
1265226	Chrome 9 ltr water extinguisher	CR9LW	20/11/2018	29/06/2012	Corridor A	OK	24/11/2011	148

Step two allows you to configure the default asset information. This includes setting the asset name by selecting the column from the table that contains the Asset Name field. You can select a default asset icon from the library, or add a new icon at this stage. You can set the booking criteria (if appropriate) and the asset's visibility and editability settings.

STEP 2: Assign default asset information

Asset Icon: 

Asset Name:

Asset Number:

Options: Bookable Parent Asset Searchable

Booking Type:

Asset Parent:

Step three is to set where within the database category structure you want these assets to reside.

STEP 3: Select Asset Category

Step four is to link the asset's fields to the CSV import table.

STEP 4: Assign columns to the assigned asset fields

Serial Number	<input type="text" value="Serial_"/>
Expiry Date	<input type="text" value="Expiry"/>
Last Maintenance Date	<input type="text" value="Maintained_by"/>
Recharged Date	<input type="text" value="Expiry"/>
Last Maintenance By	<input type="text" value="purchase_date"/>
Status	<input type="text" value="Status"/>
Barcode	<input type="text" value="Serial_"/>
Purchase Price	<input type="text" value="cost"/>

Step five is to click the *Import* button and let the system start adding your new assets. When the system has finished adding your assets, you can go into the asset records in Asset Manager and give your newly added assets a check over.

The screenshot displays the 'Asset' management interface. On the left, a tree view shows the hierarchy: Fire Extinguishers > Water > Chrome 9 ltr water extinguisher. The main area shows the configuration for a selected asset. The tabs at the top are 'Current', 'Consumables', 'History', 'Maintenance, Warranty & Leases', 'Notifications', and 'Permissions'. The 'Current' tab is active, showing a 'View Current Depreciation Report' button and power consumption settings. The 'Asset Fields' section includes various metadata fields with their values.

Field	Value
Expiry Date	20/11/2018
Last Maintenance Date	29/06/2012
Recharged Date	20/11/2018
Last Maintenance By	24/11/2011
Status	Ok
Location	Kitchen
Supplier	
Manufacturer	
Model	CR9LW
Serial Number	1265190
Purchase Price	£148.00
Purchase Date	24/11/2011

Additional details visible in the interface include:

- Power Consumption:**
 - Use Inherited Power Consumption
 - Enable Power Consumption
 - Watts: 1
 - Days per week: 1
 - Hours per day: 1
 - View Current Power Report
- Anti Virus:**
- Anti Spyware:**
- Barcode:** A QR code is displayed with an 'Edit' link next to it.