

Getting Started with Asset Manager

Importing Assets

CSE Asset Manager and Service Manager have an enormous number of powerful features, and these short introductory guides cannot cover all of them. The purpose of these guides is to get you started, and lead you to discover more about the features and facilities at your own pace.

If you need help please ask, either by emailing assetmanager@cse-net.co.uk, or telephoning 01993 886688 and asking for Asset Manager support.

To support your exploration of the system further, we have produced a number of application notes that go into greater detail on specific functions. These can be downloaded from our Asset Manager microsite at www.cseassetmanager.co.uk or can be accessed directly within the demo system by going to the *Download* section.

This guide covers how assets can be created and imported *without* using the powerful auto-discovery facilities. This is useful for adding non-ICT assets such as furniture, or for importing assets from a predecessor system.

Importing Assets from a CSV file

In this exercise we are going to use a CSV file to add some fire extinguishers to the asset register. It is slightly more complex as we will also add a new asset category and some new asset fields. To give you the opportunity to explore the demo, we will only demonstrate a couple of steps and then let you do the rest by yourself.



First thing to do is get the CSV file containing the fire extinguishers. We have placed the file within the system's downloads page. Navigate to the Admin Portal and click on *Downloads*. Double click the Fire Extinguishers CSV File header and then click the Download button. Save the file in a location where you can find it later.

Under the Main Menu navigate to *Asset Manager Settings/Asset Categories*.

Locate the *Fire Extinguishers* sub-sub category (under General Equipment).

Create a new sub category under Fire Extinguishers and call it *Water Extinguishers*. Use the icon library to select a suitable icon for this category. You could even have a go at adding your own image (though you will find a suitable icon in the Download section).



The aim is to create a structure like this.

Now look at the CSV file, paying particular attention to the column headers. Each of these represent a potential asset field that can be assigned to fire extinguisher-based assets

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Serial	Name	Model	Expiry	Recharged	Last maintenance by	Manufacturer	Status	Supplier	Last maintenance d	Location	Purchase date	Cost
2	1215166	9ltr Water Exting	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	29/06/2012	Hall	24/11/2011	£148.00
3	1215168	9ltr Water Exting	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	29/06/2012	Kitchen	24/11/2011	£148.00
4	1215169	9ltr Water Exting	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	29/06/2012	Main office	24/11/2011	£148.00
5	1215170	9ltr Water Exting	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	29/06/2012	Entrance f	24/11/2011	£148.00
6	1215171	9ltr Water Exting	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	29/06/2012	Corridor A	24/11/2011	£148.00
7	1215172	9ltr Water Exting	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	29/06/2012	Corridor B	24/11/2011	£148.00
8	1215173	9ltr Water Exting	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	30/06/2012	Corridor C	24/11/2011	£148.00
9	1215174	9ltr Water Exting	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	30/06/2012	Corridor D	24/11/2011	£148.00
10	1215178	9ltr Water Exting	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	30/06/2012	Technology	24/11/2011	£148.00
11	1215179	9ltr Water Exting	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	30/06/2012	Sports Hall	24/11/2011	£148.00
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Navigate to *Asset Fields* and take a look at the list and confirm which fields already exist. Serial Number, Name, Model, Manufacturer, Supplier, Status, Location and Purchase Price are already defined. You should find that Expiry, Last Maintained By, Last Maintained Date, and Recharged are the ones missing.

Recharged, Last Maintained Date and Expiry have one final thing in common, they are all date fields. Last Maintained By is a text-based field.

The next step is to add these new asset fields. Click the *Add Asset Field* button. Select an icon.

Name the asset field *Expiry Date*.

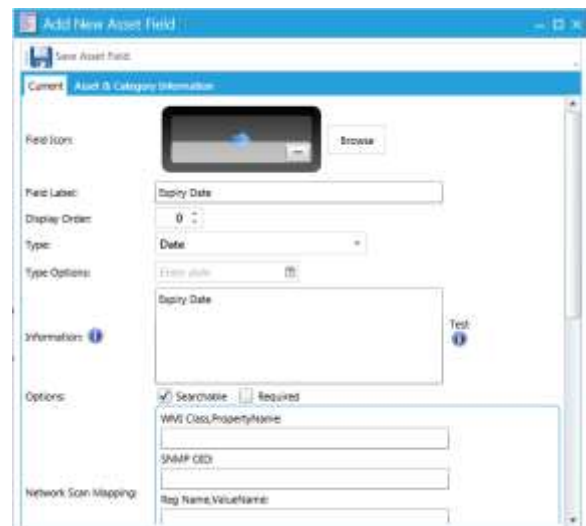
Set the type to *Date*.

Add an Information message (optional).

Save the Asset Field.

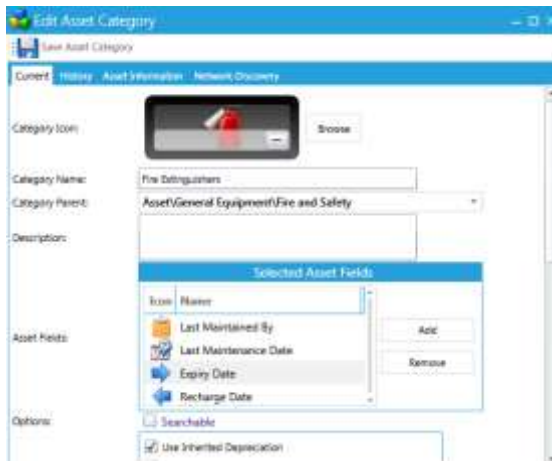
Now do exactly the same, but this time create a field for *Recharged Date* and *Last Maintenance Date*. Set the data type to *Date*.

Finally create a field called *Last Maintained By* and set its data *Type* to *Text*.



Icon	Label	Order	Type	Type Options	Information
	Recharge Date	0	Date		Recharged Date
	Expiry Date	0	Date		Expiry Date
	Last Maintenance Date	0	Date		Date on which this unit was last maintained.
	Last Maintained By	0	Text		Company who last maintained this device.

You are aiming to have these four fields added to the system.



Now we have the additional fields we need, we need to assign them to the Fire Extinguisher category.

Go back to [Asset Categories](#).

Find and open the [Fire Extinguishers](#) category.

In the Asset Fields sections add [Expiry Date](#), [Recharge Date](#), [Last Maintenance By](#) and [Last Maintenance Date](#) fields.

Save the Asset Category.

That's the groundwork done: we are now in a position to add the water-based fire extinguishers to the asset database using the CSV import method.

Navigate to [Asset Manager/Assets](#).

Select the [Import/Export](#) menu item from the toolbar and then click [Import](#). This starts the import wizard.

Select the fire extinguishers CSV file.

This will load the data and display it in tabular format so that you can see all the individual records. Note the header in each column: we will be using these later.

Select a suitable icon from the library.

Use the pull-down list and select the column name that represents the name of the asset. In this case it is called [Name](#).


Import Assets from CSV

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

Water Extinguishers.csv

Serial	Name	Model	Expiry	Recharged	Last_maintenance_by	Manufacturer	Status	Supplier	Last_maintenance_date	Location	Purchase_date	Cost
1215166	9ltr Water Extinguisher	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	29/06/2012	Hall	24/11/2011	£148.00
1215168	9ltr Water Extinguisher	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	29/06/2012	Kitchen	24/11/2011	£148.00
1215169	9ltr Water Extinguisher	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	29/06/2012	Main office	24/11/2011	£148.00
1215170	9ltr Water Extinguisher	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	29/06/2012	Entrance hall	24/11/2011	£148.00
1215171	9ltr Water Extinguisher	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	29/06/2012	Corridor A	24/11/2011	£148.00
1215172	9ltr Water Extinguisher	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	29/06/2012	Corridor B	24/11/2011	£148.00
1215173	9ltr Water Extinguisher	CR9LW	20/11/2018		Burns and Co.	Burns and Co.	OK	Burns and Co.	30/06/2012	Corridor C	24/11/2011	£148.00

STEP 2: Assign default asset information

Asset Icon: 

Asset Name:

Asset Number:

Classification:

Options:

Booking Type:

Asset Details:

STEP 3: Select Asset Category

Manufacturer:

Status:

Supplier:

STEP 4: Assign columns to the assigned asset fields

Leave all remaining information under Step 2 as it is.

Step 3 requires you to select the asset category that you want the imported assets to be part of. Using the control, expand the asset category tree and select the Water Extinguishers sub-category we added earlier.

STEP 4: Assign columns to the assigned asset fields

Expiry Date	Expiry
Recharge Date	Recharged
Last Maintenance Date	Last_maintenance_date
Last Maintained By	Last_maintenance_by
Location	Location
Purchase Date	Purchase_date
Purchase Price	Cost
Install Date	Purchase_date
Model	Model

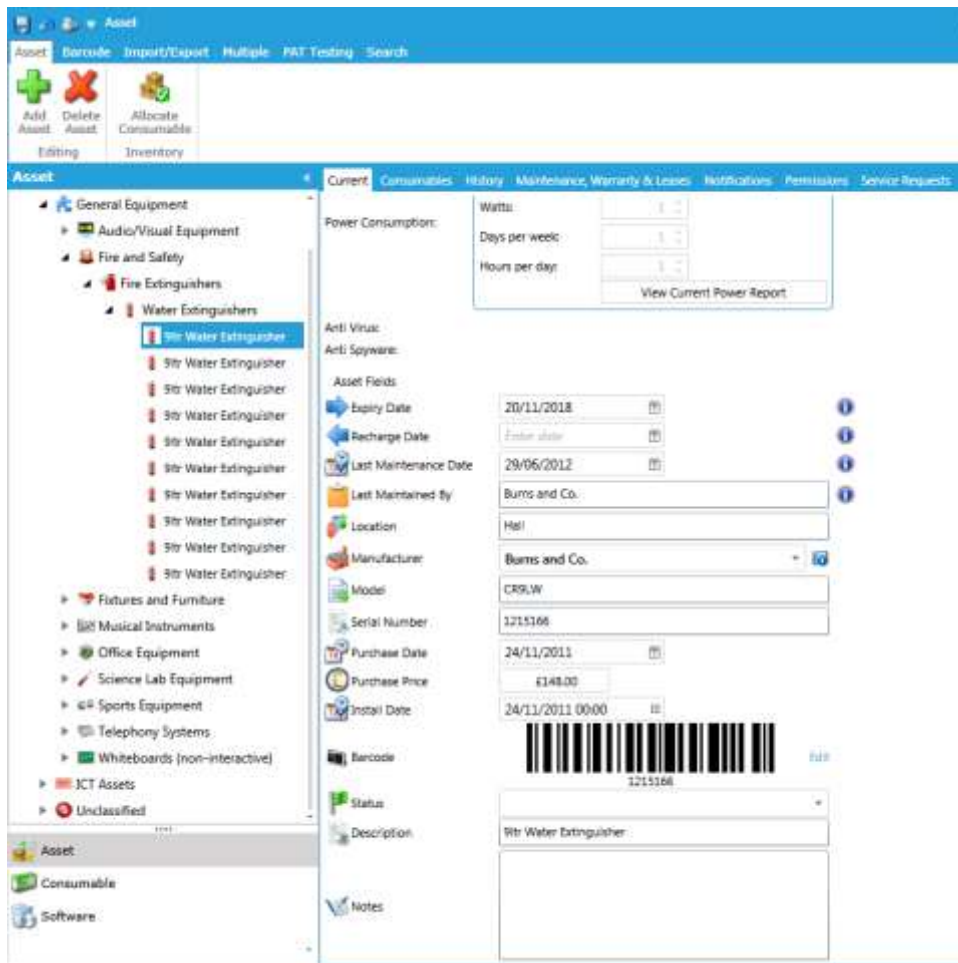
Finally, in Step 4, you assign column headers to the asset fields.

Use the pull-down list box to select the appropriate column header that matches the selected asset field.

When you have matched all the key items you can click on the *Finish* button to start the import process.

At the end of the process, follow the on-screen instructions to refresh your browser.

Now go and look at the assets that you have just added.



Now at your own pace ...

If you have your own asset CSV files, why not have a go at creating an asset category structure with your own custom asset fields? Then try importing your own assets into the database and see what happens. If you can, experiment with the different types of asset field data formats.