20.01. Assets setup

Before you can start managing your assets you need to setup things like statuses, conditions, types and properties. Please note that these settings can be created automatically if you import assets (see XXX for details).

You manually create and edit the various asset settings by going to *Special* > *Show asset settings* in the menus.

When you do that, the settings window will open at the *Statuses* tab:



Statuses

You can define as many statuses as you like. If you wish you can also define which statuses can be selected from any other statuses, so that assets follow particular status “paths”.

To add a status, click on the **New** button. This window will open:



- **Description:** The name of the status and how you will see it referred to throughout mSupply. This is a mandatory field and mSupply will tell you if you do not fill it in.
- **Is active:** Will be checked by default for a new status. If this is checked, it means the status is available for selecting. If it is not checked the status will not appear anywhere for selection, it will only appear in existing assets where it has already been chosen.
- **Can be first status:** If this is checked it means that this status can be selected when first creating an asset.
- **This is a final status:** If this is checked it means that this status is final and an asset cannot be changed to another status once it has been assigned this one.
- **These statuses can be proposed after this one:** In this section you set the statuses that can be selected as proposed statuses when this status is the current one. This is how you construct status “paths” that assets can take. If you enter no statuses in this table then there is no restriction and all statuses will be proposable when this status is the current one. To add a status to this list, click on the **Add** button. This will add a drop down list to the table which will contain all the available, active statuses you can select. To remove a status from the list, select it in the table and click on the **Remove** button.

Click on the **Cancel** button to close this window without saving any of the changes you have made to this status or click on the **OK** button to save any changes. Clicking on either will take you back to the list of statuses, which will have been updated to reflect any changes you made.

If you want to edit a status, simply double-click it in the list. This will open the same window as above populated with the status's current values and you can edit them as you require.

Note: The *Possible proposed statuses* column in the list of statuses will show:

- “All” if no proposable statuses were selected in the status's **These statuses can be proposed after this one** list
- “None” if the asset is a last status (i.e. **This is a final status** is checked)
- A list of proposable statuses if any were entered in the status's **These statuses can be proposed after this one** list

Conditions

Clicking on the *Conditions* tab will show the list of conditions:



To add a Condition, click on the **Add** button. This window will open:



- **Description:** The name of the condition and how you will see it referred to throughout mSupply. This is a mandatory field and mSupply will tell you if you do not fill it in.
- **Is active:** Will be checked by default for a new condition. If this is checked, it means the condition is available for selecting. If it is not checked the condition will not appear anywhere for selection, it will only appear in existing assets where it has already been chosen.

Types

Properties

Field labels

Document types

Preferences

From:
https://docs.msupply.org.nz/ - **mSupply documentation wiki**

Permanent link:
https://docs.msupply.org.nz/assets:assets_setup?rev=1617977990

Last update: **2021/04/09 14:19**