17.09. Importing assets

Assets are imported directly from Excel spredsheets so there is no need to export data from the spreadsheet to a tab delimited text file first (as you need to do for other imports).

Import spreadsheet format

The first row of the spreadsheet is for the column headers and is **not** imported.

The first 34 columns (up to, and including column AH, “Notes”) represent standard asset fields in mSupply and the column headers for these are completely ignored in the import. Any columns after that are for asset properties and their headers are important; those headers must be in this format:

<HTML>

Property name (Property type)

</HTML>

where **Property name** is the description the property will be given and **Property type** is one of “Text”, “Date” or “Drop down list”.

For example, a column header of **Project name (Drop down list)** will represent a drop down list property with the description **Project name**.

During the import process, if any properties or entities (like asset locations) do not exist, they will be created. If any options for drop down list properties or standard asset drop down lists (categories) are found not to exist, they will also be created.

The import spreadsheet must contain these columns in this order (*Description* and *Current status* are mandatory, the others are all optional):

Column number	Column letter	Field	Description
1	A	Code	255 alphanumeric characters. A code that the asset can be recognised by
2	B	Description	**Mandatory**. 255 alphanumeric characters. The name the asset will have and be recognised by throughout the system
3	C	Make	255 alphanumeric characters
4	D	Model	255 alphanumeric characters
5	E	Serial number	255 alphanumeric characters
6	F	Supplier name	255 alphanumeric characters. Name of the company/person who supplied the asset
7	G	Purchase order number	255 alphanumeric characters

Column number	Column letter	Field	Description
8	H	Purchase order date	Valid date in current operating system format. The date the purchase order to buy the asset was confirmed
9	I	Acquisition date	Valid date in current operating system format
10	J	Next maintenance due date	Valid date in current operating system format. The date the next maintenance is due to be carried out on the asset
11	K	Disposal date	Valid date in current operating system format. The date the asset will be or was disposed of
12	L	Last verification date	Valid date in current operating system format
13	M	Location code	20 alphanumeric characters. The code the location name will have. Will be matched against the names currently in the database. If a name with this code does not exist, one will be created with the name provided in the Location name field. If the Location name field is empty the name will be created with the code as its name. This field is mandatory if you want mSupply to create the name.
14	N	Location name	255 alphanumeric characters.
15	O	Asset user name	255 alphanumeric characters. The name of the asset user in the format "*last name*,*first name*". Will be created if the user does not exist as a contact of the location.
16	P	Asset user phone number	255 alphanumeric characters
17	Q	Asset user email	255 alphanumeric characters
18	R	Custodian location	255 alphanumeric characters. Where the custodian of the asset (the main person responsible for it) is located
19	S	Custodian name	255 alphanumeric characters. The name of the custodian
20	T	Custodian phone number	255 alphanumeric characters
21	U	Custodian email	255 alphanumeric characters
22	V	Current status	**Mandatory**. 255 alphanumeric characters. Will be created if it doesn't exist
23	W	Proposed status	255 alphanumeric characters. The proposed next status of the asset. Will be created if it doesn't exist. Please note that there is no way of telling mSupply what proposed statuses are allowed to follow which current statuses during import. This can only be done manually in the asset settings (see the 21.01. Assets setup page for details). During import all proposed statuses are assumed to be valid and will not be checked. There are, however, some important exceptions: 1. If the current status of an asset is designated to be a final status, any proposed status will be ignored. 2. If an imported asset has a current status which has some possible proposed statuses assigned, if the proposed status is not included in these, it will be added to them. So, be careful with the proposed statuses in the import file: you could make a mess if you have already set up which statuses can follow which and you don't follow that in the import file.

Column number	Column letter	Field	Description
24	X	Type	255 alphanumeric characters. Will be created if it doesn't exist
25	Y	Condition	255 alphanumeric characters. Will be created if it doesn't exist
26	Z	Purchase price	Number, currency. The cost of the asset when it was purchased
27	AA	Purchase costs	Number, currency. Any costs that are ot be added ot the purchase proce to arrive at the total value of the asset to be depreciated
28	AB	In service date	Valid date in current operating system format. The date the asset starts to depreciate from
29	AC	Useful lifespan (months)	Number, integer. The number of months the asset can be used for
30	AD	Disposal value	Number, currency. The value of the asset at the end of its useful life
31	AE	Insurer name	255 alphanumeric characters
32	AF	Insurance policy number	255 alphanumeric characters
33	AG	Insurance renewal date	Valid date in current operating system format. The date the insurance should be renewed by
34	AH	Notes	Lots of alphanumeric characters! Any other information that needs to be stored against the asset
35 onwards	AI onwards	User-defined property columns	You can add user-defined property columns in any order from column AI onwards. Column header must be in the format "*Property name* (*Type*)" where *Property name* is the name of the property and *Type* is the type of the property (either *Date*, *Text* or *Drop down list*). If the property does not exist it will be created and if the option of a Drop down list property does not exist it will also be created.

Here is an example spreadsheet you can use (contains no property columns, only the standard mSupply columns):

asset_import_blank_template.xlsx

When entering dates in the spreadsheet, make sure they are counted as text in their cells. Sometimes Excel will autoconvert dates to *date* or *numerical* format and then they will import into mSupply as blank dates. You can make sure that dates will import correctly by using the row preview functionality (see below) - if the dates look correct here then they will import correctly.

Doing the import

Go to the *File* > *Import* > *Import assets* menu and you will be asked to select the import file from a file window. After you have selected the file (if it is valid) you will be shown this window:



mSupply uses the **code** field to determine whether the asset being imported is a duplicate; an asset with the same code as one already in the database is determined to be a duplicate. Any assets with no code are ignored during duplicate checking i.e. an asset with no code can *never* be a duplicate and will always be imported as a new asset. In the *If duplicate codes are detected* section you tell mSupply what to do if it encounters a duplicate asset during the import:

- **Import as new asset:** this option will import the duplicate as a new asset
- **Skip the duplicate without asking:** the duplicate will not be imported and that row of the spreadsheet will be ignored
- **Stop the import:** as soon as a duplicate is encountered, the import will stop and all assets imported so far will be removed so that nothing is imported.
- **Update the existing asset:** the asset that already exists with the code in the database will be updated with the information contained in the spreadsheet row. A new asset will not be created. BE CAREFUL WITH THIS OPTION: if a cell is blank in the spreadsheet then the corresponding value is removed from the asset (if it had a value set for it), not left as it is.

The *Field* column of the table shows you all the columns that mSupply has detected in your import file, the *Value* column shows the values it has found in the cells for that row of the spreadsheet. You can move through the rows of the spreadsheet using the **Previous** and **Next** buttons. If you try to go beyond the first or last row of the spreadsheet mSupply will let you know.

You can carry out the import by clicking on the **Import now** button or cancel it by clicking on the **Cancel** button.

When the import has finished you will be shown a message telling you how many assets were imported and how many rows of the spreadsheet were skipped, ignored or failed.

All the assets created by the import will have the text “Created by import on *xx/xx/xxxx*” (where *xx/xx/xxxx* is the date of the import) appended to the end of their *Notes* field.

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