

2.11.4 Import / Export Wizard

Import Strategy

Presented in this topic are recommendations for using [Import Wizard](#) to import data from a different application into *tables* (*Information you enter into each field in MobileAsset is stored in a database "table" behind the scenes. You can extract this information using the Export Wizard.*) in the software database:

- The software database contains 10 tables: Site, Location, Asset Type, Asset, Depreciation Class, Employee, Customer, Vendor, Manufacturer and Department. The Import Wizard can only transfer data into one table at a time, so multiple imports must be performed to populate the database.
- You may not have external data files from which to import all the information you wish to track in the software, but importing data which you do have can save a lot of time compared to manually entering the data for each record.
- The software requires that, at a minimum, information must be imported (or manually entered) for **Site, Location, Asset Type** and **Asset**. These four tables are required for all Asset Management functions (check in, check out, etc).
- Data should be imported (or manually entered) in this sequence: Vendor, Manufacturer, Depreciation Class, Asset Type, Department, Site, Location, Asset, Employee, Customer.
- If you want to [Calculate Depreciation](#) for any or all Asset Types, import **Depreciation Class** data before importing Asset Type records.
- If you want to perform Check-Outs and Check-Ins to employees or customers, import **Employee** and/or **Customer** data.
- Data for the three remaining tables is optional: **Vendor** or **Manufacturer** (this should be imported prior to importing Asset Type records), **Department** (this should be imported prior to importing Asset and/or Employee records).
- Samples of import files are located at Program Files (x86)\Wasp Technologies\MobileAsset\Import Samples.

The following table lists the pre-requisites for importing data to each table and the functions supported by the data in each table:

Import To Table	Information that must be entered prior to importing	Data is Required to Perform These Functions	Data is Optional to Perform These Functions
Vendor	None		Create or Edit Asset Type
Manufacturer	None		Create or Edit Asset Type
Depreciation Class	None	Calculate Depreciation	Create or Edit Asset Type
Asset Type	Vendor (if desired), Manufacturer (if desired), Class (if desired)	All Asset Management Functions	
Department	None		Create or Edit Assets and/or Employees

Site	None	All Asset Management Functions	
Location	Site (at least one) (this product only supports one site)	All Asset Management Functions	
Asset	Class (if desired), Asset Type, Department (if desired), Site, Location	All Asset Management Functions	
Employee	Department (if desired)		Check-Out/Check-In
Customer	None		Check-Out/Check-In

* The database can be populated manually by manually entering each new record rather than importing the information.

The Pre-Requisites shown in the table above mandate that information be imported in the following sequence:

1. **Vendor** (Optional)
2. **Manufacturer** (Optional)
3. **Depreciation Class** (Optional)

If you intend to use them, import the Classes above before importing Asset Types!

4. **Asset Type** (Required for all Asset Management functions)
5. **Department** (Optional)
6. **Site** (Required for all Asset Management functions)
7. **Location** (Required for all Asset Management functions)

If you intend to use Department for Assets or Employees, import Departments before Assets, Employees or Customers!

Import Asset Type, Sites (if more than one) and Locations before importing Assets!

8. **Asset** (Required for all Asset Management functions)
9. **Employee** and/or **Customer** (Required only for Check-Out and Check-In functions)
10. **Funding**

Prior to importing information, external data should be organized in .txt or .csv files as follows:

Each record in a **Vendor.csv** file requires a column for **Vendor Code**.

The following columns are optional: Address 1, Address 2, City, Contact Cell No., Contact Ext., Contact Fax, Contact Name, Contact Phone, Country, Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Email, Extension, Fax, Mail Stop, Name, Notes, Phone, Postal Code, State, and Web Site.

Each record in a **Manufacturer.csv** file requires a column for **Name**.

The following columns are optional: Address 1, Address 2, City, Contact Cell No., Contact Fax, Contact Name, Contact Phone, Country, Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Email, Extension, Fax, Mail Stop, Notes, Phone, Postal Code, State, and Web Site.

Each record in a **Class.csv** file requires columns for **Name** and **Depreciation Method**.

The following columns are required only when one or more Depreciation Class records will have a Depreciation Method other than None: Asset Life Years (1 - 99) and Asset Life Months (1 - 12).

Example Class.csv records:

```
Name,Depreciation Method,Asset Life Years,Asset Life Months
DepNone,None,0,0
DepSL1y,Straight-Line,1,0
DepSL1y6m,Straight-Line,1,6
DepSL2y,Straight-Line,2,0
```

Each record in an **AssetType.csv** file requires a column for **Asset Type** and **Class** if the software is to Calculate Depreciation for one or more Asset Types.

The following columns are optional: Category, Check-Out Length, Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Description, Height, Length, Manufacturer, Model, Notes, Vendor Code, Weight, and Width.

Example AssetType.csv records:

```
AssetType,Description,Class
Acme 2750,Compression Drill,DepSL1y6m
Acme 3120,Rt-Angle Adapter,DepNone
Rorch M5,Std Line Extractor,DepSL1y
Rorch M7,Dlx Line Extractor,DepSL2y
```

Each record in a **Department.csv** file requires columns for **Department Code** and **Department Name**.

The following columns are optional: n/a

Each record in a **Site.csv** file requires a column for **Site**.

The following columns are optional: Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Description and Notes.

Example Site.csv records:

```
Site,Description
Bldg1,North Warehouse
Bldg2,South Warehouse
Bldg3,Satellite Warehouse
```

Each record in a **Location.csv** file requires columns for **Site** and **Location**.

The following columns are optional: Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Description and Notes.

Example Location.csv records:

```
Location,Site,Description
```

101,Bldg1,Room 101
102,Bldg1,Room 102
103,Bldg1,Room 103
104,Bldg1,Room 104

Each record in a **Asset.csv** file requires columns for **Asset Tag, Asset Type, Site and Location**. The following columns are optional: Additional Info, Category, Check-Out Length, Class, Condition (Bad, Excellent, Fine, or Good), Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Department Code, Depreciate Asset (T or F), Depreciation Begin Date, Manufacturer, Model, Purchase Cost, Purchase Date, Purchase Order, Salvage Value, Serial No., Warranty Begin Date, Warranty End Date and Warranty Provider.

Example Asset.csv records:
Asset Tag,AssetType,Site,Location
100001,Acme 2750,Bldg1,107
100002,Acme 2780,Bldg1,107
100003,Acme 3120,Bldg1,115
100004,Rorch M5,Bldg1,103
100005,Acme 2750,Bldg2,209

Each record in a **Employee.csv** file requires a column for **Employee No., First Name and Last Name**.

The following columns are optional: Address 1, Address 2, City, Country, Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Department, Email, Extension, Mail Stop, Notes, Phone, Phone Type, Postal Code, State and Title.

Each record in a **Customer.csv** file requires a column for **Customer No.**

The following columns are optional: Address 1, Address 2, Cell No., City, Company Name, Country, Custom Date 1 (through 5), Custom Number 1 (through 5), Custom Text 1 (through 10), Date Added, Department, Email, Extension, Fax, Home No., Mail Stop, Name, Notes, Phone, Postal and State.

.CSV files are "comma separated values" files, which many database and spreadsheet applications can create via their "File > Save as..." or "File > Export..." functions.

Please refer to the topic [Import Wizard](#) for step-by-step instructions on using the Import Wizard.

Import Wizard

The **Import Wizard** allows you to bring Vendor, Manufacturer, Depreciation Class, Asset Type, Department, Site, Location, Asset, Customer and Employee data into the *tables* (Information you enter into each field in MobileAsset is stored in a database "table" behind the scenes. You can extract this information using the *Export Wizard*.) in your database from external sources you already possess.

This software does not support direct importation of data from other databases. It imports data from .CSV or .TXT files only. As this function is in a wizard form, the screens will guide you through each step of the export process.

What is a .csv file?

This is a type of data format in which each piece of data is separated by a comma. This is a popular format for transferring data from one application to another, because most database systems are able to import and export comma-delimited data.

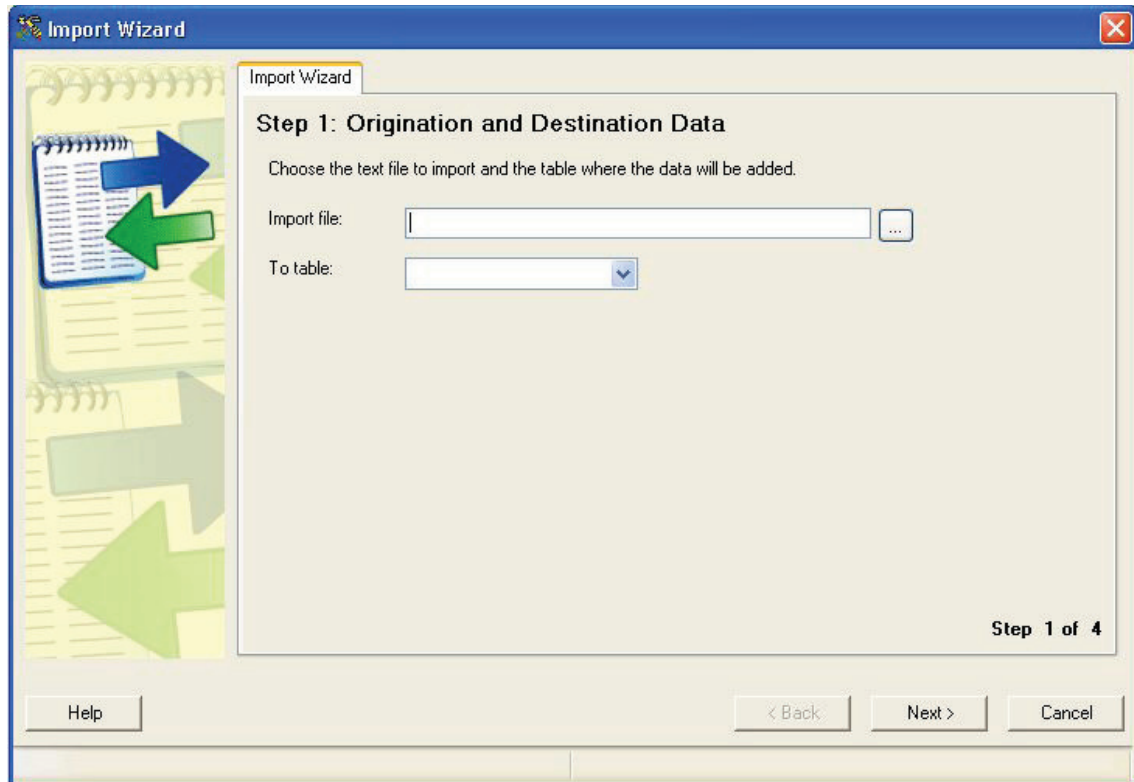
For example, data pulled from a database and represented in comma-delimited format looks something like the following. Each column value is separated by a comma from the next column's value and each row starts a new line:

```
Adams, Jane, 46, female, New York
Doe, John, 32, male, California
Jones, Sam, 13, male, Texas
Smith, Mary, 64, female, Louisiana
```

When data is represented in comma-delimited format they also are referred to as comma-separated values, abbreviated CSV.

Please study the [Import Strategy](#) topic before proceeding.

1. To access the Import Wizard, from the **Main** screen, select **Administration > Import/Export > Import Wizard**. The **Import Wizard** screen shown below appears:



It is from this screen that you can start the process of Importing data into MobileAsset's tables.

Example of an Import to the Asset table

As discussed in the Import Strategy topic, data imported to the Asset table must be preceded by the creation of Site, Location, and Asset Type data (and, if depreciation is to be calculated for one or more Asset Types, by creation of Depreciation Class records - which must be done before importing Asset Type data.)

1. Having previously populated the database with Site, Location, Depreciation Class and Asset Type data, in that sequence, proceed with importing information to the Asset table.
2. Select an import file for the Asset table by browsing to a .csv or .txt file that contains Asset data and selecting Asset from the To table dropdown list.

You can only import from a text (.txt or .csv file).

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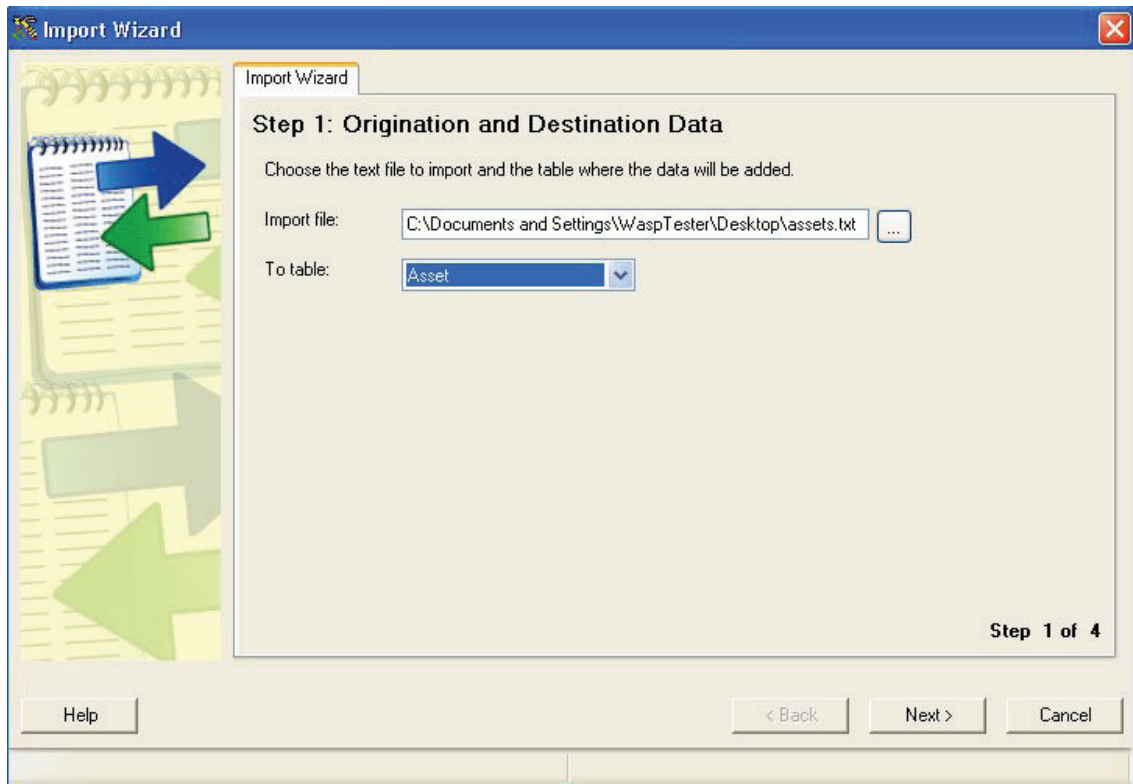
If your data normally resides in a different data format, you must first use your database software's **File > Export** or **File > Save As** function to translate the data to a .csv or .txt file.

See the [Import Strategy](#) topic.

You must strip out all currency symbols, including (but not limited to) these examples: \$, ¢, ¥, £, §, or ¤, if you are about to import them into a numeric field, such as Purchase Cost, Salvage Value, etc. They are permissible in text fields.

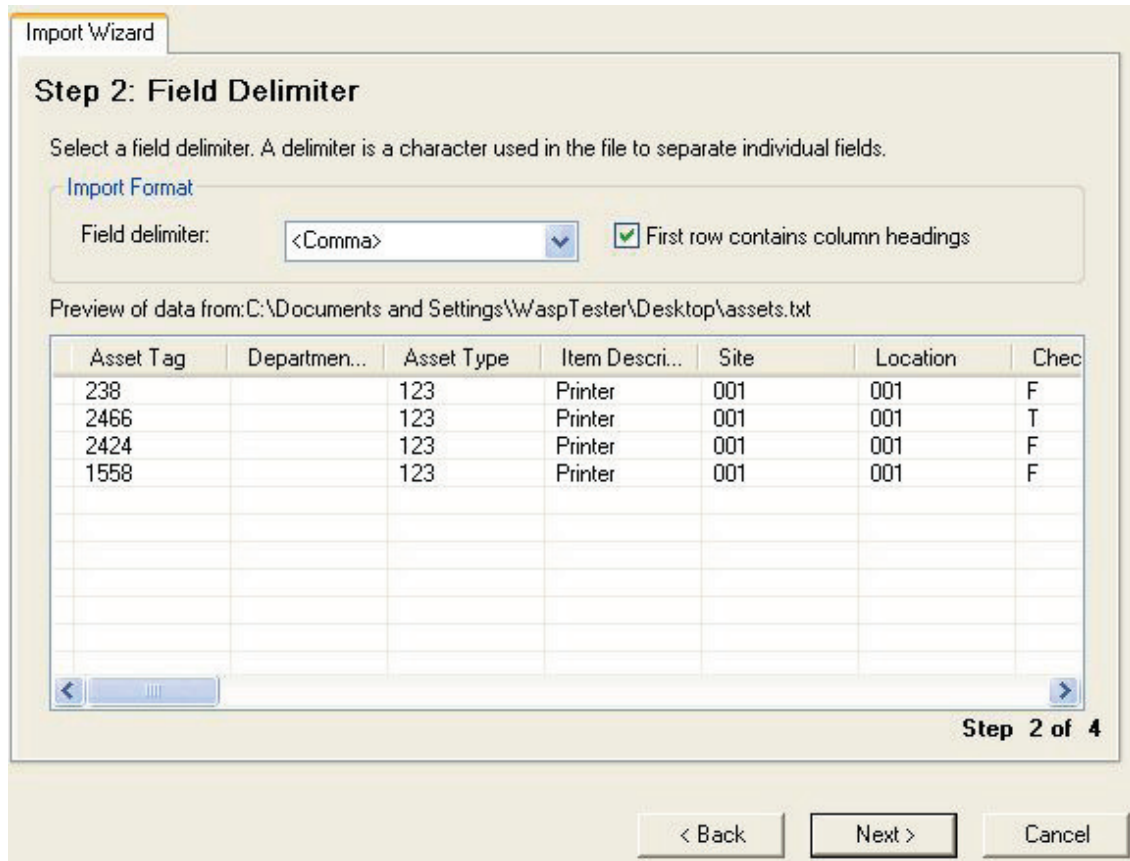
Commas, sometimes used as "thousands" separators, should be removed from numeric fields.

Commas are permissible in text fields only when residing within a pair of double quotes, which will cause them to be treated as normal text, not as field delimiters.



- Step 2 of the wizard allows you to specify how you want your information broken up in the export file. This is called the **Field Delimiter**. Make your selection from the Field Delimiter drop down list, then select the checkbox if you want to include field names in the first row of your export file. Select the **First row contains column headings** option only if the first record of the file you are importing does not contain actual data. The software cannot remove subtotals, section headers, nor any other records within the file that do not match the format of the actual data records. These must be removed before you attempt the import.

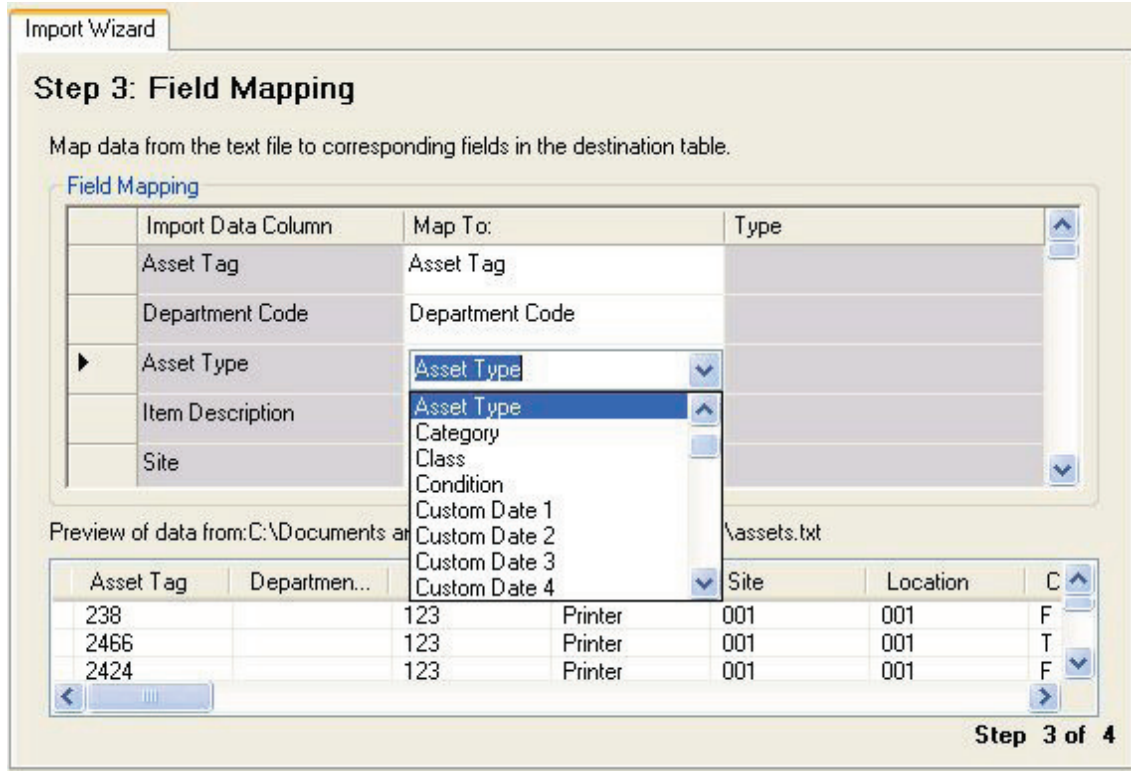
The **Preview of data from table** grid displays the information using the selected delimiter, as shown below. If all the data is in one column of the preview pane, you have not selected the right Delimiter.



- Next, the **Field Mapping** screen appears. This screen allows you to associate columns in your imported data file with corresponding fields in the table into which you are importing the data. Depending on the contents of your original database, not every column in your imported data needs to be mapped to a corresponding field in the software. The object is to bring over at least the required fields and any others that may be of use.

Note: Your .csv or .txt file may have column headers with names that do not exactly match field names the way this example data does. By mapping the imported data's columns to each table's columns, any difference in field names can be accommodated.

Select the appropriate **Map To** field names by clicking on a field in the **Import Data Column**, then selecting from the resulting drop down list, then click **Next** to continue.



If you failed to map columns for one or more of the table's required fields, you will receive a prompt like this:



- When all the required fields have been mapped correctly, click **Finish**. A confirmation message will appear when the file has imported correctly.

Click **OK** and then **Close** to exit the Import Wizard.

You can confirm that the data imported correctly by checking the List screens (From the **Main** screen, click **List Forms** > < list screen name >).