



# Importing Updates to Assets

SyAM's asset management system offers the capability to update asset data directly in the database using a CSV file. This feature enables organizations to efficiently keep their assets up to date with the latest information. Importing updates allows for bulk updating of asset information, streamlining the process, and saving time.

## Creating the File to be Imported

From the Asset Dashboard, apply filters to display the specific range of assets you wish to update.

Click on the Download File icon  to export the asset data as a CSV file.

When importing the updates for your assets, ensure that the asset name column does not contain duplicates or empty rows.

In this example, we will focus on updating information specifically for our printers.

Save Delete Clear

Classification

- Chromebook
- Computer - Desktop
- Computer - Notebook
- Computer - Server
- Email to ticket
- iPad
- iPhone
- New Hire
- Parent Helpdesk
- Phone
- Printer
- Staff Helpdesk

Department

- Domain/Workgroup
- Function
- IP Address
- Location
- Machine Model

| Classification = 'Printer' |                        |              |                |                     |             |                |   |
|----------------------------|------------------------|--------------|----------------|---------------------|-------------|----------------|---|
|                            | Asset Name             | Asset Number | Location       | Function            | Description | Classification | M |
| <input type="checkbox"/>   | TO-Printer-RM2-AST497  | AST497       | Town Office    | Printer             | Printer     | Printer        | F |
| <input type="checkbox"/>   | MS-Printer-RM24-AST243 | AST243       | Middle School  | Printer             | Printer     | Printer        | F |
| <input type="checkbox"/>   | MS-Printer-RM22-AST223 | AST223       | Middle School  | Printer             | Printer     | Printer        | F |
| <input type="checkbox"/>   | HS-Printer-RM15-AST153 | AST153       | High School    | Printer             | Printer     | Printer        | F |
| <input type="checkbox"/>   | HS-Printer-RM12-AST123 | AST123       | High School    | Printer             | Printer     | Printer        | F |
| <input type="checkbox"/>   | HP-Laserjet-74598966   | AST7488      | Town Office    | Accounting Printer  |             | Printer        | F |
| <input type="checkbox"/>   | HP-Laserjet-74558858   | AST7455      | Town Office    | Main Office Printer |             | Printer        | F |
| <input type="checkbox"/>   | CO-Printer-RM2-AST46   | AST46        | Central Office | Printer             | Printer     | Printer        | X |
| <input type="checkbox"/>   | CO-Printer-RM1-AST1    | AST1         | Central Office | Printer             | Printer     | Printer        | F |



## Quick Reference Importing Updates to Assets

Open the downloaded CSV file in Excel.

| A               | B            | C           | D                      | E              | F               | G              | H                   | I                     | J             | K        |
|-----------------|--------------|-------------|------------------------|----------------|-----------------|----------------|---------------------|-----------------------|---------------|----------|
| Site Name       | Asset Number | Description | Asset Name             | Date Installed | Owner           | Location       | Function            | Inventory Number      | Serial Number | Bar Code |
| School District | AST1         | Printer     | CO-Printer-RM1-AST1    | 8/30/2019 0:00 | businessmanager | Central Office | Printer             | Asset Inventory Num 1 | 872131k978    | 1123342  |
| School District | AST123       | Printer     | HS-Printer-RM12-AST123 | 8/30/2019 0:00 | hsprincipal     | High School    | Printer             | Asset Inventory Num 1 | 349874lp29    | 1123342  |
| School District | AST153       | Printer     | HS-Printer-RM15-AST153 | 8/30/2019 0:00 | hsteacher       | High School    | Printer             | Asset Inventory Num 1 | 2798645132    | 1123342  |
| School District | AST223       | Printer     | MS-Printer-RM22-AST223 | 8/30/2019 0:00 | msprincipal     | Middle School  | Printer             | Asset Inventory Num 1 | 976542po39    | 1123342  |
| School District | AST243       | Printer     | MS-Printer-RM24-AST243 | 8/30/2019 0:00 | msteacher       | Middle School  | Printer             | Asset Inventory Num 1 | 2975697pq8    | 1123342  |
| School District | AST46        | Printer     | CO-Printer-RM2-AST46   | 5/31/2019 0:00 | zach            | Central Office | Printer             | Asset Inventory Num 1 | 613579la87    | 1123342  |
| School District | AST497       | Printer     | TO-Printer-RM2-AST497  | 5/31/2019 0:00 |                 | Town Office    | Printer             | Asset Inventory Num 1 | 5497823146    | 1123342  |
| School District | AST7455      |             | HP-Laserjet-74558858   |                |                 | Town Office    | Main Office Printer |                       | 74558858      |          |
| School District | AST7488      |             | HP-Laserjet-74598966   |                |                 | Town Office    | Accounting Printer  |                       | 74598966      |          |

Delete all rows of Assets that you do not wish to update.

Delete any columns in the CSV file that are not going to be used for importing the data. Only retain the column headings that contain the fields being updated.

Enter or paste the data of the assets you wish to add into the corresponding columns.

**\*\*PLEASE NOTE\*\* - To ensure accurate updates, the CSV file must include the Asset Name field as the key import field. This field is necessary for the system to identify which assets require updates to be applied.**

When updating Date fields, it is crucial to have the correct format. To ensure accurate formatting, it is recommended to export an asset that has the desired fields populated correctly. This exported asset can serve as a reference for the correct formatting when updating Date fields for other assets.

After entering your data in the CSV file, check for duplicate Asset Names and ensure that there are no duplicates. Additionally, review the Asset Number and Serial Number columns for any duplicates.




## Quick Reference Importing Updates to Assets

| A           | B                      | C              | D               | E              | F                            | G                    | H                   | I |
|-------------|------------------------|----------------|-----------------|----------------|------------------------------|----------------------|---------------------|---|
| Description | Asset Name             | Date Installed | Owner           | Purchase Price | Purchase Order # / Invoice # | Warranty Expiry Date | Depreciation Method |   |
| Printer     | CO-Printer-RM1-AST1    | 8/30/2019 0:00 | businessmanager | 5000           | 3600                         | 8/30/2019 0:00       | Straight Line       |   |
| Printer     | HS-Printer-RM12-AST123 | 8/30/2019 0:00 | hsprincipal     | 5000           | 3600                         | 8/30/2019 0:00       | Straight Line       |   |
| Printer     | HS-Printer-RM15-AST153 | 8/30/2019 0:00 | hsteacher       | 5000           | 3600                         | 8/30/2019 0:00       | Straight Line       |   |
| Printer     | MS-Printer-RM22-AST223 | 8/30/2019 0:00 | msprincipal     | 5000           | 3600                         | 8/30/2019 0:00       | Straight Line       |   |
| Printer     | MS-Printer-RM24-AST243 | 8/30/2019 0:00 | msteacher       | 5000           | 3600                         | 8/30/2019 0:00       | Straight Line       |   |
| Printer     | CO-Printer-RM2-AST46   | 5/31/2019 0:00 | zach            | 232            | 3600                         | 5/31/2019 0:00       | Straight Line       |   |
| Printer     | TO-Printer-RM2-AST497  | 5/31/2019 0:00 |                 | 332            | 3600                         | 5/31/2019 0:00       | Straight Line       |   |
| Printer     | HP-Laserjet-74558858   | 1/31/2021 0:00 | Office          | 475            | 4221                         | 1/31/2024 0:00       | Straight Line       |   |
| Printer     | HP-Laserjet-74598966   | 8/31/2021 0:00 | John            | 475            | 4334                         | 8/31/2024 0:00       | Straight Line       |   |
|             |                        |                |                 |                |                              |                      |                     |   |
|             |                        |                |                 |                |                              |                      |                     |   |

Another check to perform on your file is to ensure that there are no empty rows or columns at the end. In Excel, remove several rows below the last filled row and remove several columns after the last filled column. Alternatively, you can open the CSV file in Notepad and check the end of the file to ensure there are no excessive commas representing empty fields. It is recommended to import a file with only a few assets initially to verify that the data is being populated correctly.

**\*\*PLEASE NOTE\*\*** Importing blank values will not remove existing values in the asset database. If a field in the CSV file is left blank during import, it will not overwrite or remove any existing values for that field in the asset database.

## Importing the Asset CSV File

Access the Asset Dashboard and click on the Upload File icon.  Click on "Choose file" and select the CSV file that you want to import.

We strongly recommend running a backup before performing an asset import.

No file chosen

After selecting the file, click on "Upload File". This will open the Column Mapping table.



## Quick Reference Importing Updates to Assets

If you used the Asset file template, all mapping will be in place. If you used your own column headings, you will need to select the relevant asset field to be mapped to each column heading.

Select "Asset Name" as your key column, and then click on "Import Asset Data".

We strongly recommend running a backup before performing an asset import.

No file chosen

File Uploaded

Match SyAM column names with your csv column.

Select up to 3 Key Columns that uniquely identifies each asset.

| CSV Column Names             | SyAM Column Names   | Key Columns                         |
|------------------------------|---|-------------------------------------|
| Description                  | <input type="text" value="Description"/>                  | <input type="checkbox"/>            |
| Asset Name                   | <input type="text" value="Asset Name"/>                   | <input checked="" type="checkbox"/> |
| Date Installed               | <input type="text" value="Date Installed"/>               | <input type="checkbox"/>            |
| Owner                        | <input type="text" value="Owner"/>                        | <input type="checkbox"/>            |
| Purchase Price               | <input type="text" value="Purchase Price"/>               | <input type="checkbox"/>            |
| Purchase Order # / Invoice # | <input type="text" value="Purchase Order # / Invoice #"/> | <input type="checkbox"/>            |
| Warranty Expiry Date         | <input type="text" value="Warranty Expiry Date"/>         | <input type="checkbox"/>            |
| Depreciation Method          | <input type="text" value="Depreciation Method"/>          | <input type="checkbox"/>            |

To preserve data formats when editing with a spreadsheet application, import the data as text. For detailed instructions see the help file.

Choose a site:

First row contains column headings?

During the import process, the system will check if the Asset Name already exists. If it does, the existing asset will be updated with the fields from the CSV file. If the Asset Name does not exist, a new asset will be created, and the fields will be populated from the CSV file.

The time taken to import will vary based on the number of assets and columns being imported.

Once the import process is complete, you will be provided with information on the number of assets that were added and the number of assets that were updated.

We strongly recommend running a backup before performing an asset import.

No file chosen

**Asset data imported successfully.**  
0 rows inserted; 9 rows updated.



## Verify Imported Data

Confirm that the imported data is accurate and matches the expected values by reviewing the details of the imported assets.

From the Asset Dashboard, apply the necessary filters to navigate to the assets that were imported. In this scenario, since updates were made to printers, you can use the classification attribute to filter and display assets that are classified as "printer."

- Classification
  - Chromebook
  - Computer - Desktop
  - Computer - Notebook
  - Computer - Server
  - Email to ticket
  - iPad
  - iPhone
  - New Hire
  - Parent Helpdesk
  - Phone
  - Printer
  - Staff Helpdesk
- Department
- Domain/Workgroup
- Function
- IP Address
- Location

| Classification = 'Printer'

| Asset Name                                      | Asset Number | Location       | Function            | Description | Classification | Manufacturer | Machine Model   | Owner           |
|---|--------------|----------------|---------------------|-------------|----------------|--------------|-----------------|-----------------|
| <input type="checkbox"/> TO-Printer-RM2-AST497  | AST497       | Town Office    | Printer             | Printer     | Printer        | HP           | SVP1            |                 |
| <input type="checkbox"/> MS-Printer-RM24-AST243 | AST243       | Middle School  | Printer             | Printer     | Printer        | HP           | HP2300mfp       | msteacher       |
| <input type="checkbox"/> MS-Printer-RM22-AST223 | AST223       | Middle School  | Printer             | Printer     | Printer        | HP           | HP2300mfp       | msprincipal     |
| <input type="checkbox"/> HS-Printer-RM15-AST153 | AST153       | High School    | Printer             | Printer     | Printer        | HP           | HP2500mfp       | hsteacher       |
| <input type="checkbox"/> HS-Printer-RM12-AST123 | AST123       | High School    | Printer             | Printer     | Printer        | HP           | HP2500mfp       | hsprincipal     |
| <input type="checkbox"/> HP-Laserjet-74598966   | AST7488      | Town Office    | Accounting Printer  | Printer     | Printer        | HP           | LaserJet-272MFP | John            |
| <input type="checkbox"/> HP-Laserjet-74568858   | AST7455      | Town Office    | Main Office Printer | Printer     | Printer        | HP           | LaserJet-272MFP | Office          |
| <input type="checkbox"/> CO-Printer-RM2-AST46   | AST46        | Central Office | Printer             | Printer     | Printer        | Xerox        | SVP1            | zach            |
| <input type="checkbox"/> CO-Printer-RM1-AST1    | AST1         | Central Office | Printer             | Printer     | Printer        | HP           | HP2300mfp       | businessmanager |



## Quick Reference Importing Updates to Assets

Click on any of the updated printers from the Asset Dashboard and view its details to confirm that the data is updated correctly in the respective fields.

In our example, we can observe that the owner, date installed, and description fields have been updated with the corresponding values from our CSV file.

**Add/Edit Asset**

**Site Name:** School District **Asset:** HP-Laserjet-74598966

**Asset Details**

**General Information** | Financial Information | Service Information | Insurance

|                                   |   |                         |  |
|-----------------------------------|---|-------------------------|--|
| <b>Site</b>                       | School District   | <b>Image</b>            | <input type="button" value="Choose File"/> No file chosen                |
| <b>Asset Number</b>               | AST7488   | <b>Asset Name</b>       | HP-Laserjet-74598966   |
| <b>Description</b>                | Printer   | <b>Inventory Number</b> |  |
| <b>Date Installed</b>             | 8/31/2021   | <b>Serial Number</b>    | 74598966   |
| <b>Last Inventoried / Audited</b> | 1/1/2023  | <b>Bar Code</b>         |  |
| <b>Retired Date</b>               |   | <b>Asset Notes</b>      |  |
| <b>Primary MAC Address</b>        |   |                         |  |
| <b>IP Address</b>                 |   |                         |  |
| <b>Manufacturer</b>               | HP  | <b>Machine Model</b>    | LaserJet-272MFP  |
|                                   | <input type="button" value="Add"/> <input type="button" value="Remove"/>      |                         | <input type="button" value="Add"/> <input type="button" value="Remove"/> |
| <b>Department</b>                 | None  | <b>Classification</b>   | Printer  |
|                                   | <input type="button" value="Add"/> <input type="button" value="Remove"/>      |                         | <input type="button" value="Add"/> <input type="button" value="Remove"/> |
| <b>Owner</b>                      | John  | <b>Location</b>         | Town Office  |
|                                   | <input type="button" value="Add"/> <input type="button" value="Remove"/>      |                         | <input type="button" value="Add"/> <input type="button" value="Remove"/> |
| <b>Function</b>                   | Accounting Printer  | <b>Room Number</b>      | None   |
|                                   | <input type="button" value="Add"/> <input type="button" value="Remove"/>      |                         | <input type="button" value="Add"/> <input type="button" value="Remove"/> |
| <b>Status</b>                     | In Use  | <b>Geolocation</b>      |  |
|                                   | <input type="button" value="Add"/> <input type="button" value="Remove"/>      |                         |  |
| <b>Device URL</b>                 | http:// <input type="text"/><br><input type="button" value="Launch Console"/> |                         |  |



## Quick Reference Importing Updates to Assets

If we navigate to the financial information tab, we can verify that the Purchase price, Purchase Order, Warranty Expiry date, and depreciation method have been successfully updated with the corresponding values from our CSV file.

**Add/Edit Asset**

Site Name: School District Asset: HP-Laserjet-74598966

Asset Details

General Information | **Financial Information** | Service Information | Insurance

|                            |  |                              |  |
|----------------------------|--|------------------------------|--|
| Purchase Price             | <input type="text" value="475.00"/>                                  | Purchase Order # / Invoice # | <input type="text" value="4334"/>                              |
| Fiscal Year                | <input type="text"/>   |                              |  |
| Vendor / Supplier          | <input type="text" value="None"/> <small>Add Remove</small>          | Vendor Web Link              | <input type="text" value="None"/> <small>Add Remove</small>    |
| Vendor Contact Name        | <input type="text"/>   | Vendor Contact E-Mail        | <input type="text"/>   |
| Vendor Contact Telephone   | <input type="text"/>   | Warranty Expiry Date         | <input type="text" value="8/31/2024"/> <small>Calendar</small> |
| Warranty (Months)          | <input type="text" value="None"/> <small>Add Remove</small>          | Date Removed                 | <input type="text"/> <small>Calendar</small>                   |
| Salvage Value              | <input type="text"/>   | Lease Cost                   | <input type="text"/>   |
| Lease Term                 | <input type="text" value="None"/> <small>Add Remove</small>          | Lease End Date               | <input type="text"/> <small>Calendar</small>                   |
| Lease Start Date           | <input type="text"/> <small>Calendar</small>                         | Life Cycle (Months)          | <input type="text" value="None"/> <small>Add Remove</small>    |
| Replace With               | <input type="text"/>   | Replacement Cost             | <input type="text"/>   |
| Scheduled Replacement Date | <input type="text"/> <small>Calendar</small>                         | Monthly Depreciation Amount  | <input type="text"/>   |
| Depreciation Method        | <input type="text" value="Straight Line"/> <small>Add Remove</small> | Financial Notes              | <input type="text"/>   |
| Annual Depreciation Amount | <input type="text"/>   | Financial Grant              | <input type="text" value="None"/> <small>Add Remove</small>    |

Apply Close Remove Asset

## Troubleshooting



## Quick Reference Importing Updates to Assets

If your file fails to import, check for the following potential issues:

Check the file for duplicated Asset Names – use Excel

Check for empty rows in and at the end of the data being imported

Choose File No file chosen

Upload File

Asset names can not be blank

Check the Column headings, it must contain a column heading called “Asset Name”

Choose File No file chosen

Upload File

No asset name column found.

Assets do not show in Asset Dashboard, check to see if you added the assets to a Location or Asset Classification that your user does not have access to.

Reviewing the Asset Import Log File – The import log file can be found under

C:\sitemanager\assetutility\assetimport.log

Reviewing the file used on the import – A copy of the csv file used on the last import can be found under C:\sitemanager\assetutility\assets.csv

The mapping of the column number to the asset field can be viewed under  
C:\sitemanager\assetutility\colmap.txt

By addressing these potential issues, you can troubleshoot and resolve any problems encountered during the import process.

If you are unable to see the assets that were updated, ensure that your user account has the necessary access permissions for the asset classification and location. Verify that your user





## Quick Reference Importing Updates to Assets

account has been granted the appropriate privileges to view and access assets with the specific classification and location that were updated.

### Administration – Users and Groups – Asset Classification Access

Select your site and then the group you wish to edit.

Scroll down the page and mark the newly added asset classification that was imported. After that, continue scrolling and check off the imported location as well.

**\*\*PLEASE NOTE\*\* - You will need to have administrator access to make updates to Asset Classification Access.**

|                          |
|--------------------------|
| Site Management          |
| Asset Management +       |
| Directory Services       |
| Email +                  |
| Events & Classifications |
| Help Desk +              |
| Knowledge Base           |
| License Management       |
| Self Service +           |
| <b>Users and Groups</b>  |
| Custom Fields            |

Groups Users **Site Manager Asset Classification Access**

Configure User Access and Auto Assign Tickets by Location and Asset Classification.

Choose site:  Choose Group:

**Site Manager Asset Classification Access**

| Classifications     |                                     | administrator                       | syam                                |
|---------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Chromebook          | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Computer - Desktop  | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Computer - Notebook | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Computer - Server   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Computer - Tablet   | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Email to ticket     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| iPad                | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| iPhone              | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| New Hire            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Other               | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

If there is no checkbox next to the asset classification or location, it indicates that you do not have the necessary access privileges to view or access the updated assets. Without the checkbox, you will not be able to access those assets.