

1 Introducing AssetManage

What Is AssetManage?

AssetManage allows you to maintain records of all your company (or personal) possessions. It can be used for tax or insurance purposes, or simply because you would like to keep track of what you own. You can instantly see all items that belong to a particular location, room, department or category by clicking within the Location or Category tree window.

AssetManage Features include:

- Attach up to 4 pictures to each of your records by scanning, pasting or importing them.
- Attach files and links to your records. Click on the attachment link to visit the specified website address or launch the attached file.
- Multi-User ready.
- Create custom queries using the Query Manager
- Several different print report formats, and a print preview function -- see how your documents will look before you put them on paper.
- Check when warranties expire on catalogued items.
- Track expenses related to an item.
- The integrated Report Designer lets you create Reports, Labels & File Cards.
- Track changes in an item's location or status.
- Calculate depreciation. AssetManage can calculate an item's depreciation using **Straight-Line**, **Sum of Years Digits**, **Double-Declining Balance**, **150% Declining Balance** and **Percentage per Year** depreciation methods.

Note that the AssetManage database file (ASSETS.MDB) is a Microsoft Access format file that is not encrypted or password protected.

1.1 Exporting Data to an Excel or Access File

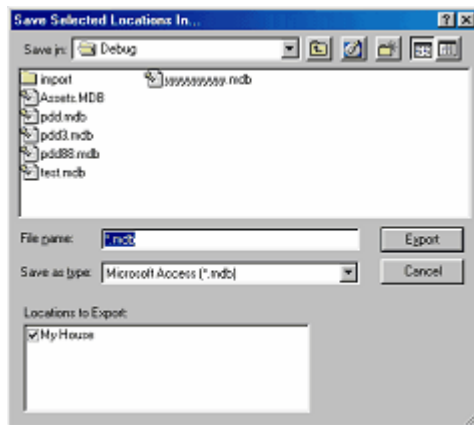
AssetManage can export data to 3 formats:

- HTML
- Microsoft Access – MDB files
- Microsoft Excel – XLS files

To export data to an Access or Excel file:

Under the **File** menu,

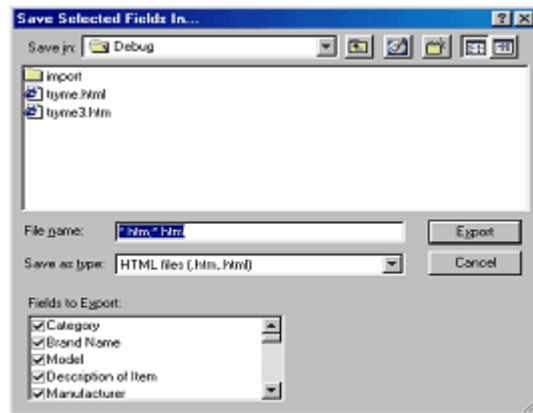
- Select the 'Export...' command. The following dialog will appear:



- Choose an existing Excel or Access file, or specify a new file.
- Select the locations you would like to export.
- Click the 'Export' button.

1.2 Exporting Data to an HTML File

Under the **File** menu, select 'Export to HTML...'. The following dialog will appear:



- Select an existing HTML file, or specify a new one.
- Select the fields to be exported.
- Click on the 'Export' button.

To view the results, run your Internet browser and open the file to which you have just exported.

1.3 Importing Data From Other Software

AssetManage can import delimited text files and Microsoft Excel spreadsheets. Not only can you import data pertaining to assets, but you can also import Dealer, Customer, Manufacturer and Insurer information. If you have been using another application to store your data, check to see if the application has the option to export data. Many programs allow you to export to a .CSV (comma separated variable file).

To import data

1. Select **Import Data...** from the **File** menu
2. Choose a Text File (.csv, .tab, .txt, .asc) or Excel (.xls) file. and then select the **Open** button.
3. AssetManage will show the field structure of the file to be imported in the **Source Field Names** column. You will also see the first few rows of data from the import file. To select a Destination Field for each column, click on the appropriate row and column within the Destination Field. Then select the appropriate column from the drop-down list that appears.