# 20.02. Asset management

**Assets** are the equipment and items used to support a health supply chain, like vehicles, fridges, and freezers.

In contrast, **stock or inventory** are the medicinal products and consumables that move through the health supply chains to be used by health workers or dispensed to patients. **Stock or inventory** include items like Amoxicillin 500mg capsules and surgical masks. Don't manage those using the asset functionality!

Different information is important when recording assets including:

- when the asset was purchased as well as when it was sold or thrown away
- current location and maintenance schedule
- current value and depreciation

mSupply allows you to manage the assets you have throughout your supply chain.

Before using this functionality, there is some setup you should carry out first. See the 21.01. Assets setup page for details.

# **Viewing assets**

To see a list of the current assets in your system, choose *Special* > *Show assets* from the menus or the Assets icon on the Navigator:

Last update: 2021/06/04 02:46



That will open this window:

0							Assets					
Show assets who	DSe											
	Description	contains	\$									
	Code	contains	:									
	Location	contains	:									
	Type	is		Don't Care	+							
	Condition	is		Don't Care	\$			_	-		_	_
	Status	is		Don't Care	\$	<u>+</u> .	- 🎝	1	$\leq$			
	Disposal date	is	\$	00/00/00			lete Duplicate	Add document to			Report	Customi
	Acquisition date	is	\$					document to selected	Update selected			
Code		escription		Serial number	Make	Model	Type	Status	Condition	Location	Notes	
D4567	Desk							Status 3	Out of service			
GEN9876	Generator 01				Gencorp	AK-11	Infrastructure	Status 2				
	_											
			_									
			_									
			_									

# Filters

The filters are in the Show assets whose... section in the top left corner and they determine which

assets appear in the table. There are many filters so you can scroll the filter area to see them all.

- Each filter has 3 columns: the label, the comparator and the search value.
  - $\circ\,$  The comparator is either a drop down list for you to select or fixed at "is"
  - The search value is either a drop down list for you to select the value or an empty text field for you to enter the value to be matched against.
- Any filter that has nothing in the right hand column (the search value) is ignored, just like other filters throughout mSupply.
- The filters are all ANDed together. This means that only assets that match **all** the filters applied will appear in the table e.g.
- By default the only filter applied is "Disposal date is nothing" so all the assets that have no disposal date (i.e. are active) will be displayed.
- When you close the asset list window, the filters you have set are saved for you so that when you open the window again, exactly the same filters will be applied.
- The first filters (down to *Renewal date*) are fixed and represent some of the standard fields you can enter for assets. The filters after that are for the current active properties (set in asset settings see 20.01. Assets setup page for details.

# Notes about date filtering

- In a date filter, any invalid dates you enter in the right hand column will automatically be turned into an empty date (usually 00/00/00 but will depend on your current operating system date settings).
- If you do an *is* empty date search, that will include assets that **do not** have any value set for that date.
- If you do an *is not* search on an empty date, that will include all assets that **do** have that particular date set (to any value).

# A note about property filters

The filters after the *Renewal date* filter are for your currently active asset properties.

If you use an *is not* filter for a particular property value, any assets **that do not have a value set** for that property will **not** be included in the assets displayed.

For example, let's say you have a property called Colour. Asset1 has a colour value of Blue, Asset2 has a colour of Red and Asset3 has no colour value set. If you set the colour filter to *Colour is not Red*, only Asset1 will be shown. Asset2 is not included because its colour is Red and Asset3 is not included because it has no value set for colour.

# **Deleting an asset**

To delete an asset, simply select it in the table (by clicking on it) and click on the **Delete** button. You will be asked to confirm the deletion before it is carried out.

### **Duplicating an asset**

To duplicate an asset, simply select it in the table (by clicking on it) and click on the **Duplicate** button. You will be asked to confirm the duplication before it is carried out.

A duplicate asset will have exactly the same values for all fields and properties as the one you selected to duplicate (including its attached documents) except the Description and Notes fields:

- The Description field of the duplicate asset will have "(Copy)" appended to it.
- The Notes of the duplicate will have the same notes but with "Created by duplication of asset '*description*'." appended to it.

# Uploading documents to assets

This function is for uploading the same document to one or more assets at the same time.

Simply select the assets you wish to add the document to in the list (by clicking on them and using Shift+click and Ctrl+click to select the ones you want) then click on the **Add document to Selected** button. This window will open:

•	Add	document to asse	st(s)		
File name					Choose
Document type	Please select			0	
			Can	cel	ОК
			Can	cel	

- **Choose button:** Click on this to choose the file to upload to the asset. A window showing the files available on your computer will open and you can navigate to the file to select it by double-clicking on it. When you do that, the name and path of the file will be displayed in the **File name** field.
- **Document type:** Select one of the active document types.

Both these fields are compulsory. You can click on the Cancel button to cancel the upload or the OK button to action it.

After the upload has been carried out you will be shown a message telling you how many assets the document was successfully uploaded to.

# Updating several assets at once

The **Update selected** button allows you to update values of one or more assets at the same time. Before clicking on the button, select the assets you want to update in the table by clicking on them and using Shift+click and Ctrl+click to select the ones you want.

After clicking on the button, this window opens:

•••	Update selected asset(s)		
Update assets with t	he values below		
	Proposed status Please select		÷
	Type Please select		\$
	Condition Please select		\$
	Project Please select		•
	Approval committee Please select		\$
	Make		
	Model		
	Supplier Name		
	Purchase order No.		
	Purchase order date		
Update current	status to the proposed status		
	(	Cancel	ОК

The window contains many of the standard fields for assets and all the currently active properties. You can select values in the drop down lists (which are set to *Please select...* when the window first opens) and enter values in the text fields of the right hand column for as many fields as you wish to update (the list of fields is long so you will need to scroll it to see them all).

# All the assets you selected will be given the same values you select and enter in the right hand column so be careful!

If you want to update each of the selected asset's current status to be their proposed status then check the **Update current status to the proposed status** button.

When you are ready, click on the **OK** button to carry out the updates. When the update has been carried out, you will be told how many of the selected assets were successfully updated. Any errors will be logged and you can see these logs by going to Admin > View log (see 25.19. The system log for details).

# Reporting

To run an asset report, click on the **Report** button.

At the moment, this button does nothing but reports will be added soon.

# Customising the asset table

The **Customise** button enables you to choose which columns will appear in the assets table **for you**. Other users are not affected by the choices you make.

When you click on the buttonn this window opens:

Available	Chosen	
Proposed status	Code	
Purchase order No.	Description	
Purchase order date	Serial number	_
Supplier Name	Make	
Date created	Model	
Acquisition date	Туре	
Next maintenance due date	Status	_
Last verification date	>> Condition	1
Disposal date	Location	Ţ
Original cost	< Notes	
Residual value		
Residual lifespan		
Depreciated value		
Months in use		
Insurer		
Policy number		
Renewal date		
Arrived with user		
Customs release		
Date sent for repair		
Approval committee		
Project		
	Cancel	OK

The *Chosen* column shows the columns that are currently shown in the assets table. The *Available* column contains all the columns that you can add to the table (these include a columnn for each currently active asset property).

- To add a column to the table, click on it in the *Available* column to select it and click on the button to move it into the *Chosen* column.
- To remove a column fron the table, click on it in the *Chosen* column and click on the button to move it into the *Available* column.

You can also change the order the columns appear in the table. To do this, click on a column name in the *Chosen* column and click on the up arrow or down arrow button to move it up or down in the list. The higher up the list it is, the further to the left the column will appear in the table.

Click on the **OK** button to save the changes you have made or the **Cancel** button to close the window without saving any changes. The table will update immediately to match any changes you have saved.

# **Editing assets**

To edit an asset, simply double-click on it in the list. When you do that, the asset detail window will open, allowing you to edit the asset's details. The window looks like this:

	Details	Documents Log
Description Desk		Status
Code D4567		Current status Status 01
		Proposed status Please select Change to proposed
Make		Proposed status Please select Proposed
Model		Categories
Serial number		Type Please select
pplier		Condition Please select
Supplier Name		Project Please select
Purchase order No. 1234	Purchase order date 00/00/00	Approval committee Please select
ates		
	Acquisition date 03/08/2021	
	Next maintenance due date 00/00/00	Other details
	Last verification date 00/00/00	Fuel type
	Disposal date 00/00/00 🧱	Colour brown
		Depreciation
ocation		Original cost 0 Purchase costs
Name	L	In service date 00/00/00
Category 1		Useful lifespan 0 years ( 0 months)
Location address 1		Disposal value 0 Residual value
Location address 2		
Asset user		
Name		Insurance
Phone	Email	Insurer
1 Hore	Linder	Policy number
Custodian		Renewal date 00/00/00
Custodian location	Custodian	
Phone	Email	Notes

- **OK** button: saves any changes you have made to the asset and closes this window.
- **OK & Next** button: saves any changes you have made to the asset and displays the information for the next asset in the list. The same tab will be displayed.
- **Cancel** button: closes the window without saving anything (Note: any documents uploaded to the asset will have already been saved so clicking the **Cancel** button will not remove them).

Note: if you do not have the *Add/Edit assets* permission (see 23.15. Managing users for details) then the **OK** and **OK & Next** buttons do not save anything.

#### **Details tab**

Note that several of the fields on this window have user-definable labels (see the 20.01. Assets setup page for details on how to set them). The screenshot above uses the default labels and we will use them in the discussion below, but this will explain whay you may see some different labels for some of the fields in your copy of mSupply.

The first few fields are plain text fields and allow you to enter the asset's description, code, make, model and serial number.

#### Supplier section

Here you can enter the details of the supplier who supplied you with the asset.

In the *Purchase order date* field you can enter the date manually or click on the calendar icon and select a date from there. If you click on the calendar icon and then change you mind, clicking

anywhere outsude the calendar that appears will close the calendar and put an empty date in the *Purchase order date* field.

The date fields and their calendar icons all work the same way on this page.

#### **Dates section**

The dates here can be entered manually or by using the corresponding calendar icon.

The first 4 dates are standard dates used by mSupply. If you have any active date type properties they will appear after these 4 in alphabetical order.

#### Location section

In this section you enter the details of where the asset is.

**Name:** Here you select the location name. It can be any customer, supplier, donor etc. that is in mSupply. You type the first few characters of the name then press the Tab key to select from a list of matching names (if only one name matches, it is selected for you) as normal.

If the location is not already a customer, supplier or donor etc. in mSupply then you can add it by clicking on the button next to the *Name* field. This will open a new name window for you to enter the details; when you clock the **OK** button on that window, the name will be created (as a customer) and entered in the location *Name* field on this window.

When a location name is selected, if you want to view the details of the name you can click on the button next to it; this will open the name details window where you can view and edit (if you have permission) the location's details.

- **Category 1:** A read only field that displays the Category 1 set for the location name.
- **Address 1:** A read only field that displays the Main/Billing address 1 field of the location name.
- Address 2: A read only field that displays the Main/Billing address 2 field of the location name.

**Asset user:** The asset user is usually the person who uses the asset the most or who you would contact if you needed information about it. But you can use this field (and the Custodian fields) to record the contact information you need. The asset user fields are all read-only because the information is actually recorded as a contact of the location name. See 5.01. Names: using, adding and editing for details on how to do this. To tell mSupply the contact is an asset user set the contact's *Category* field to "**Asset user**".

- Asset user Name: The contact's First name followed by their Last name fields.
- **Phone:** The contact's *Phone* field value.
- **email:** The contact's *Email* field value.

**Custodian:** The asset custodian would typically be someone in authority who is responsible for the asset or someone who is temporarily looking after it. These fields are all text fields and you can enter the details as required.

#### Status section

The statuses that an asset can have are defined in the settings (see 20.02. Assets setup for details).

The current status of the asset is displayed in the read-only *Current status* field.

The status that is being proposed next for the asset is displayed in the *Proposed status* drop down list. You can select one from the list or leave it at *Please select…* if no next is to be proposed. The drop down list will contain all the active statuses that were set in the Current status's *These statuses can be proposed after this one* list (or all active statuses if that field was left empty). However, if the Current status has the *This is a final status* checkbox checked then the Proposed status drop down list will be disabled because no further statuses can be proposed from a final status.

**Change to proposed** button: If you have the *Change asset status* permission (See the 23.15. Managing users page for details) then this button will be enabled. Clicking on this button will update the *Current status* to the *Proposed status*.

You cannot undo this action so be sure you want to do it before you click on the button! You can of course, change the proposed status and click on the button again to change to a different proposed status but you cannot go back to the status you were at before if it is not a proposable status from the current one.

#### **Categories section**

This section contains a set of drop down lists for you to select various values for the asset. The first two, *Type* and *Condition* are standard mSupply categories that will always be present. After those will appear all the active *Drop down list* type properties in alphabetical order.

Click on the drop down lists and select appropriate values as required.

#### **Other details**

If you have any *Text* type active properties set then they will appear in this section in alphabetical order. Otherwise, this section will be empty.

The names of the properties will appear in a left hand column and a right hand column will contain text fields containing the asset's current values for the properties if any have been set. Click into the text fields and edit the values as required.

#### Depreciation

Depreciation is an accounting method used to represent how much of an asset's value has been used up. mSupply uses straight line depreciation in its calculations and only includes whole months used.

The Original cost, In service date and Useful lifespan fields must be filled in before the calculations can be made. Once they have been filled in the calculated values will appear in the read-only Residual value, Residual lifespan and Depreciated value fields.

- **Purchase price:** The actual price of the asset, as quoted by the supplier.
- **Purchase costs:** Any costs associated with the purchase that can be included in the total sum to be depreciated (e.g. tax).
- Original cost: The total, original cost of the asset before it starts to depreciate. It is the sum of the *Purchase price* and *Purchase costs* fields and, if you fill in either of those two fields, mSupply will calculate the sum and enter the value in the *Original cost* field for you. You can override that calculation by entering a value manually into this field if you wish; doing so will not change the values in the *Purchase price* or *Purchase costs* fields. Note: leaving the *Purchase price* or *Purchase costs* fields blank will not affect your depreciation calculations, they are there only for your records and benefit. But beware, if you enter a value in either of them it will overwrite the value in the *Original cost* field.
- In service date: The date the asset went into service and depreciation starts from.
- **Useful lifespan:** The length of time the asset can be used for. You can enter a value in either the *Months* or *Years* fields and mSupply will calculate and fill in the other one.
- **Disposal value:** The value of the asset when it reaches the end of its useful lifespan e.g. the price you do or can sell it for. Not needed to run the depreciation calculations but will obviously affect the *Residual* and *Depreciated* values.
- **Residual value:** Calculated, read-only field. The current value of the asset (actually the value at the end of the last complete month since the *In service date*).
- **Residual lifespan:** Calculated, read-only field. The amount of the useful lifespan that is left in months (rounded down to the nearest complete month).
- **Depreciated amount:** Calculated, read-only field. The amount of the Original cost that has been lost due to depreciation (= *Original cost Residual value*).

#### Insurance

Enter the name of the Insurer, the policy number and the policy renewal date in these fields.

There is functionality to send reminder emails when an asset's insurance renewal date is a set number of weeks away. Please see the settings in the Assets tab on the 15.01. General preferences page for details about that.

#### Notes

This is an almost unlimited free-text field where you can enter any additional information you need to record.

# **Documents tab**

The Documents tab is where you can view and manage the files that have been uploaded to this particular asset. It looks like this:

•	Add/edit asset	
	Details Documents Log	
Add Remove		
Document name	Туре	Date uploaded
		OK & Next Cancel OK

In the table you can see the documents that have already been uploaded to this asset, their document types and the date they were uploaded.

#### Viewing an already uploaded file

To see the contents of any file, simply double-click on it in the list. If there is an application on your computer to open the file, it will be opened and the contents displayed for you using that application. If there is no application, you will be given the option to download and save the file on your computer.

#### Uploading another file to the asset

To do this, simply click on the **Add** button. This window will open:

• • •	Add document to asset(s)	
File name Document type	Please select	Choose
	Cance	ICEE OK

• **Choose button:** Click on this to choose the file to upload to the asset. A window showing the files available on your computer will open and you can navigate to the file to select it by double-clicking on it. When you do that, the name and path of the file will be displayed in the **File name** field.

• **Document type:** Select one of the active document types.

Both these fields are compulsory. You can click on the Cancel button to cancel the upload or the OK button to action it.

After the upload has been carried out you will be shown a message telling if the upload was successful. If successful the document will appear in the list of attached documents.

#### Removing a document from the asset

To remove a document from the asset, select it in the list and click on the **Remove** button. You will be asked to confoirm the deletion before it is carried out and it is removed from the list.

# Log tab

				Add/edit asset	
Details Documents Log					
Date 25/03/2021	Time 12:29:20 sussol	User	Type Asset created	Event Asset Desk created	
				OK & Next Cancel O	

The log tab shows you all the logs that have been generated for this particular asset. If you need to see more detail on the log entry then find it in the complete log by going to *Special* > *View log* (see the 25.19. The system log page for more details).

# Adding an asset

To add an asset, click on the **New** button. That will open the same window as when editing an asset

13/14

#### but it will be empty:

Name Status   Code Proposed status   Modei Proposed status   Modei Categories   Supplier Name Type Please select   Supplier Name Purchase order date 00/00/00 ((())   Purchase order No. Purchase order date 00/00/00 ((())   Nates Acquisition date   Next maintenance due date (())   Disposal date ())   Last verification date ())   Disposal date ())   Location Purchase refer   Name ())   Address 1 ())   Address 2 ())   Address 2 ())   Address 2 ())		Details D	Documents Log
Code   Make   Mode   Strial number   Node   Splier Name   Purchase order No.   Purchase order date @0/00/00   State   Acquisition date   Disposal date   Disposal date   Disposal date   Disposal date   Category 1   Address 2   Asset user   Name   Pone   Email   Custodian location   Custodian location   Custodian   Custodian <	Name	octain o	
Make   Mode   Srial number   upplier   Supplier Name   Purchase order No:   Purchase order date (00/00/00 )   Acter order date (00/00/00 )			Current status Please select
Model   Srial number   iupplier   Supplier Name   Purchase order Na.   Purchase order date 00/00/00 (E)   Acquisition date   Name   Name   Name   Supplier Name   Name   Category 1   Address 2   Address 2   Asst user   Name   Phone   Enail   Custodian   Custodian   Custodian   Custodian			
Serial number iupplier Supplier Name Purchase order No. Purchase order date 00/00/00 (6) Actes Acquisition date Next maintenance due date Issposal date Disposal date Disposal date Disposal date Category 1 Address 2 Address 2 Actes Category 1 Address 2 Category 1 Category 1 Address 2 Category 1 Category 1 Ca	Make		Proposed status proposed
Serial number	Model		Categories
iupplier   Supplier Name   Purchase order No.   Purchase order No.   Purchase order No.   Purchase order No.   Purchase order date   Purchase order d	Serial number		
Supplier Name Purchase order No.   Purchase order No. Purchase order date (00/00/00 (E))   Actes Acquisition date (E)   Acquisition date (E) Other details   Ispeciation Fuel type   Ispeciation Colour   Name In service date (00/00/00 (E))   Address 1 Purchase costs   Address 2 Purchase costs   Address 2 Purchase price   Name In service date (00/00/00 (E))   Address 2 In service date (00/00/00 (E))   Address 2 Purchase costs   In service date (00/00/00 (E)) Purchase price   In service date (00/00/00 (E)) Purchase price   In service date (00/00/00 (E)) Purchase costs   In service date (00/00/00 (E)) Purchase costs   In service date (00/00/00 (E)) Purchase price   In service date (00/00/00 (E)) Purchase costs   In service date (00/00/00 (E)) Purchase (E)   Issurance Insurance   Issurance Insurance   Insurance Insurance   Issurance Insurance   Issurance Insurance   Issurance Insurance	Supplier		
Purchase order No. Purchase order date 00/00/00     Adders     Address 1   Address 2   Address 2     Category 1   Address 2   Phone   Email     Custodian   Custodian   Custodian     Custodian     Custodian     Poinc     Custodian        Poinc     Custodian        Custodian </td <td>Supplier Name</td> <td></td> <td></td>	Supplier Name		
Aates Cation Category 1 Category 1 Category 2 Address 2 Address 2 Catodian locatio Custodian Cus	Purchase order No.	Purchase order date 00/00/00	
Acquisition date   Next maintenance due date   Last verification date   Disposal date   Disposal date   Adress 1   Address 2   Name   Address 2   Name   Phone   Email   Custodian   Custodian location   Custodian   Custodian   Custodian   Custodian   Custodian			
Name   Category 1   Address 2   Name   Address 2   Name   Phone   Email   Custodian location   Custodian location   Custodian location   Custodian location   Custodian location	Dates		
Last verification date   Disposal date   Arrived with user     Accession     Name   Category 1   Address 1   Address 2     Address 2     Name   Phone   Email     Insurance   Insurance   Insurance   Insurance   Plone   Custodian location   Custodian   Custodian     Cus		Acquisition date	
Disposal date     Arrived with user        Acctaion     Name   Category 1   Address 1   Address 2   Address 2     Address 2   Asset user     Name   Phone   Exstodian   Custodian location   Custodian                        <		Next maintenance due date	
Arrived with user     Acategory 1     Category 1     Address 1     Address 2     Address 2     Asset user     Name     Phone        Custodian <td></td> <td>Disposal date</td> <td></td>		Disposal date	
Name Image: Category 1   Address 1 Image: Category 1   Address 2 Image: Category 1   Image: Category 1 Image: Category 1 <td< td=""><td></td><td>Arrived with user</td><td>Contra</td></td<>		Arrived with user	Contra
Name In service date 0 Purchase costs   Address 1 In service date 00/00/00 Purchase price   Address 2 In service date 00/00/00 Purchase price   Address 2 In service date 00/00/00 Residual value   Address 2 In service date 00/00/00 Residual value   Asset user Insurer Residual lifespan 0 months   Phone Email Insurer Insurer   Custodian Custodian Custodian Renewal date	location		
Category 1   Address 1   Address 2   Address 2   Asset user   Name   Phone   Email			
Address 1 0   Address 2 0   Address 2 0   Address 2 0   Asset user 0   Name 0   Phone Email   Custodian Custodian   Custodian Custodian		. 🛎 💌	
Address 2 Disposal value 0 Residual value   Address 2 Residual lifespan 0 months   Asset user Residual lifespan 0 months   Name Insurance   Phone Email Policy number   Custodian location Custodian Renewal date (00/00/00			Useful lifespan 0 years ( 0 months)
Aset user   Name   Phone   Email     Kesidual lifespan     Insurance     Insurance     Policy number     Policy number     Renewal date     Vater			Disposal value 0 Residual value 0
Name         Insurance           Phone         Email         Insure           Custodian location         Custodian         Renewal date         00/00/00			Residual lifespan 0 months Depreciated value 0
Phone     Email     Insure       Policy number     Policy number       Custodian location     Custodian			Insurance
Policy number           Custodian         Renewal date         00/00/00           Custodian location         Custodian			Insurer
Custodian location Custodian	Phone	Email	Policy number
Custodian location Custodian	Custodian		
Phone Email Notes	Custodian location	Custodian	
	Phone	Email	Notes

The *Current status* field is now a drop down list, containing all the active statuses that have the *Can* be first status checkbox checked.

The *Proposed status* field is disabled; you cannot set a proposed status for a new asset.

When you have filled in all the appropriate information, you can click on the OK button to create the new asset or the Cancel button to close the window without saving.

The *Description* and *Current status* fields are mandatory for a new asset and mSupply will tell you if you do not fill them in.

# Connecting assets with stock via stock location (e.g cold chain equipment)

Sometimes it is helpful to make a connection between an asset and the stock of medicines or medical consumables that they contain or affect. You might want to do this for cold chain equipment, for example - so that you can link temperature variations or breaches to the need for maintenance or repair.

You make this connection by telling mSupply what asset a particular stock location is part of.

The details on how to do this are found on the 4.06. Stock locations and location types page.

# Assets in a synchronisation system

Asset settings are system data and so they are settable on the primary server only. Any asset settings created or edited here are synchronised to all other sites.

Assets themselves are store based data so they can only be created and edited in the active copy of a store. Assets will synchronise from here to the central server and any collector copies of the store only.

Previous: 21.01. Assets setup | | Next: 22. mSupply Mobile (Android)

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Permanent link: https://docs.msupply.org.nz/assets:asset\_management?rev=1622774790



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