

# CSV Editing with Excel

The Connector Tool exports and accepts imports in the CSV file type. While Microsoft Excel allows you to manipulate CSV files, Excel is not a dedicated CSV editor. *\*Note: The Connector Tool feature is available to Asset Essentials clients for an additional cost. Please contact your Sales Representative or Client Services if you are interested in purchasing this feature.*

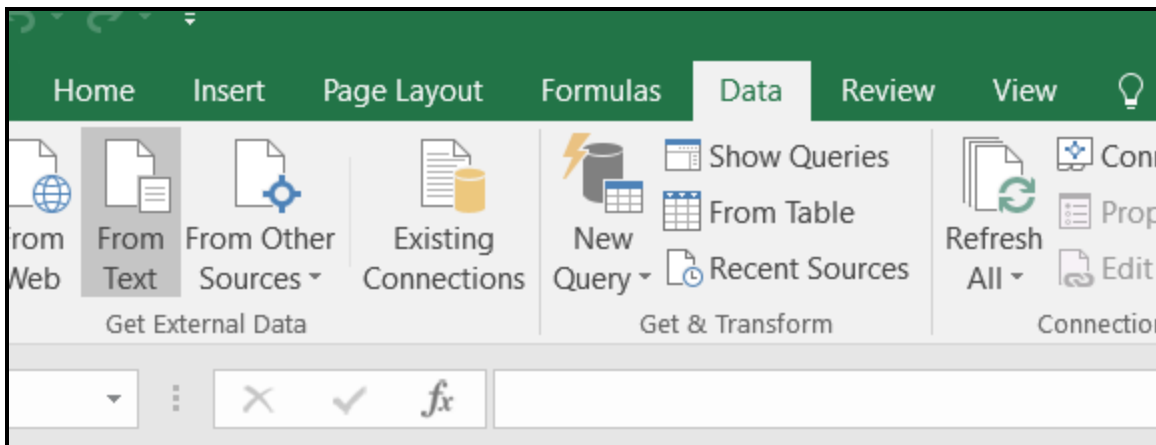
## The Dude Says:

We highly recommend following the instructions on this page to avoid auto formatting issues when working with CSV files in Microsoft Excel.

## Opening the File

We recommend following these instructions any time you need to open your CSV file to make edits. If you double-click the file on your computer, Excel will try and auto-format the data in the CSV file, which can cause issues when importing your data back into Asset Essentials.

- Open Microsoft Excel and click the **Blank Workbook** option if prompted.
- Click the **Data** tab, and select **From Text**.



- Find your CSV file stored on your computer, and click **Open**.
- In the Text Import Wizard window, be sure **Delimited** is selected as your file type.
- In the File origin drop down, select **65001 : Unicode (UTF-8)**
- Check the **My Data has headers** box.
- Click the **Next** button.

Text Import Wizard - Step 1 of 3

The Text Wizard has determined that your data is Delimited.

If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

☒ Delimited - Characters such as commas or tabs separate each field.

☐ Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row:  File origin:

☒ My data has headers.

Preview of file C:\Users\evan.bahoric\Documents\My Data.csv.

1	Name, Origin, Source, Number, Status, Status ID
2	
3	
4	
5	
6	

Cancel < Back Next > Finish

- In the Delimiters section, make sure **Comma** is the only box checked.
- Click the **Next** button.

Text Import Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☐ Tab

☐ Semicolon

☒ Comma

☐ Space

☐ Other:

☐ Treat consecutive delimiters as one

Text qualifier:

Data preview

Name	OriginType	SourceType	WorkOrderNo	WOSTatusName	WOSTatusNo
hvac broken	NonPM	Site	0000000005	In Progress	3.00
Daily Custodial Cleaning	PM	Site	0000000004	In Progress	3.00
Crane Jib Inspection	PM	Asset	0000000003	Completed	4.00
Framework Construction	NonPM	Asset	0000000002	In Progress	3.00
	NonPM	Unknown	0000000001	In Progress	3.00

Cancel < Back Next > Finish

- In the Data preview section, make sure all columns are highlighted by scrolling to the right most column and holding the Shift key while selecting the final column.
- In the Column data format section, select **Text**.
- Click the **Finish** button.
- Click the **OK** button on next pop-up window to populate the data into the spreadsheet.

Text Import Wizard - Step 3 of 3

This screen lets you select each column and set the Data Format.

Column data format

☐ General  
☒ **Text**  
☐ Date: MDY  
☐ Do not import column (skip)

'General' converts numeric values to numbers, date values to dates, and all remaining values to text.

Advanced...

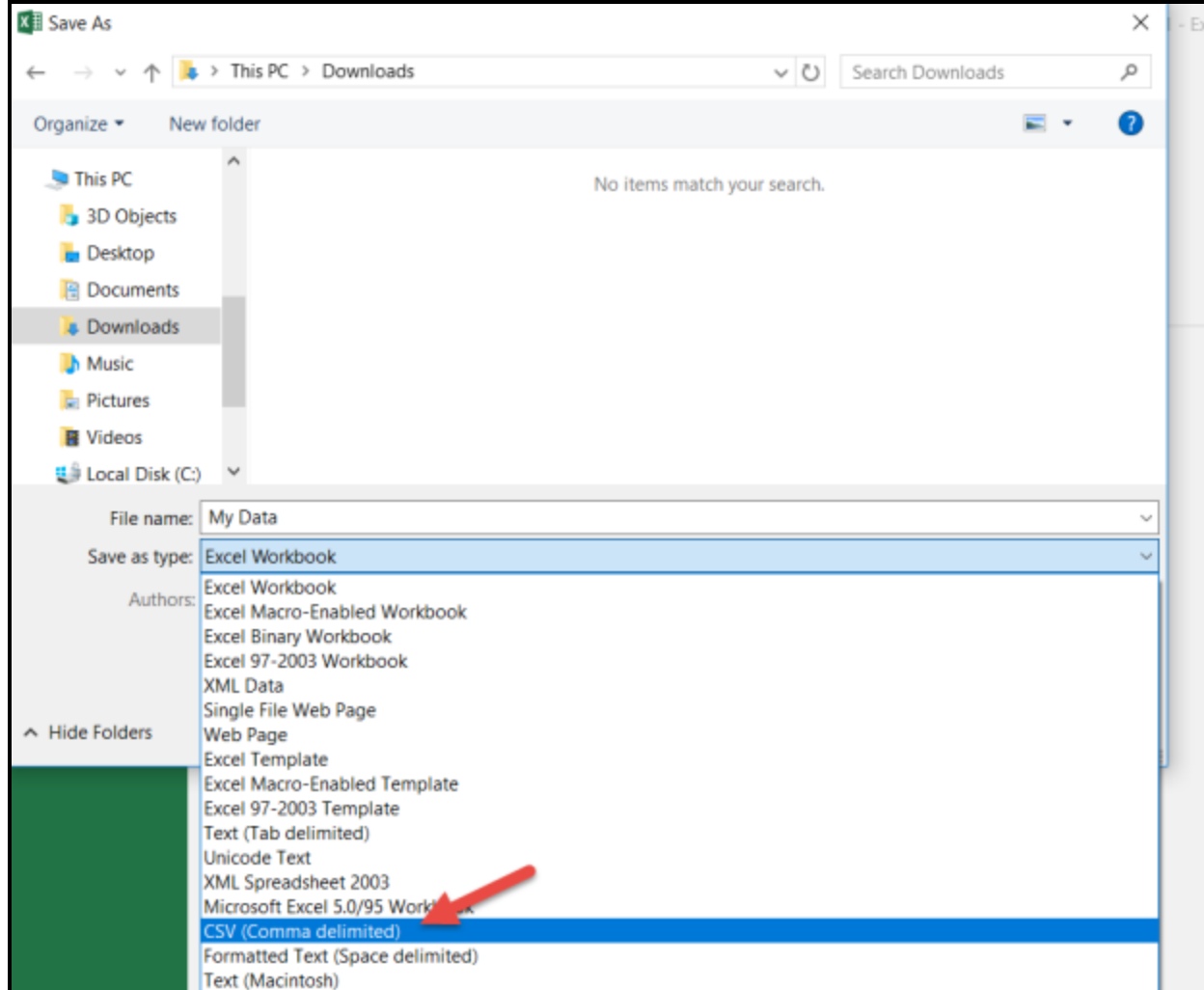
Data preview

Text	Text	Text	Text	Text	Text
Name	OriginType	SourceType	WorkOrderNo	WOStatusName	WOStatusNo
hvac broken	NonPM	Site	0000000005	In Progress	3.00
Daily Custodial Cleaning	PM	Site	0000000004	In Progress	3.00
Crane Jib Inspection	PM	Asset	0000000003	Completed	4.00
	NonPM	Asset	0000000002	In Progress	3.00
Framework Construction	NonPM	Unknown	0000000001	In Progress	3.00

Cancel < Back Next > Finish

## Saving the File

- Click the **File** tab in Excel and select **Save**.
- Choose a location to store the file on your computer.
- Be sure the Save as type option selected is **CSV (Comma delimited)**.
- Click the **Save** button.



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[Yes](#)

[No](#)

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