

VERSION 2.0
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Apps for Greentree

BULK ASSET USAGE ENTRY

APP NUMBER: 010120

Powered by:

MYOB Greentree

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FEATURES

1. **Allows updates to assets usage in bulk (update all child assets with usage enabled)**

This is to avoid having to record usage for each individual asset when there are sub assets whose usage is the same as what is recorded at the parent asset level. (This can apply to multiple sub levels.

Usage hours may be recorded at the master item detail or lower. Wherever entered, the usage hours will also be updated to that asset and any sub asset.

2. **Allows Reset of component hours**

This is to reflect the fact that some assets may be replaced independently (whether this is the parent or sub component) and their usage needs to be reset to zero.

3. **Total usage data is retained**

Total usage needs to be recorded because even though maintenance on any item can allow it to have usage reset, this can only be done a set number of times.

For example, a component may be able to do 20,000 hours before maintenance, and this can be done three times, with Total Usage maximum 60,000 hours before it must be totally replaced.

IMPORTANT NOTES

- We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.

OTHER REQUIREMENTS

Greentree Modules: CRM Assets

Associated Apps:

USER INSTRUCTIONS

PHYSICAL ASSET READINGS

| CRM | Asset Management | Physical Assets

For assets where usage is recorded, the usage is entered on the Usage tab by specifying the latest reading - total usage. This may be hours/copies/kilometres or miles.

Each asset must be updated individually.

The screenshot displays the 'Physical Asset Maintenance' application window. The 'Usage' tab is selected, showing a form for entering usage data for asset 'ADMES' (AD Turbochargers). The form includes fields for Date, Reading, Quantity, Test Quantity, Entered By, Service Request, and Extra. A 'Save Line' button is present. Below the form is a table with columns: Date, Time, Reading, Quantity, Test Quantity, Service Requi, Entered By, and Notes. The table contains five rows of usage data, with the most recent entry highlighted in blue.

Date	Time	Reading	Quantity	Test Quantity	Service Requi	Entered By	Notes
10/01/2017	11:18:37 a.m.	235.0000	20.0000	0.0000		Cork	
09/01/2017	11:19:12 a.m.	245.0000	10.0000	0.0000		Cork	
09/01/2017	11:17:35 a.m.	215.0000	15.0000	0.0000		Cork	
09/01/2017	11:16:49 a.m.	200.0000	200.0000	0.0000		Cork	
		0.0000	0.0000	0.0000		Cork	

BULK ASSET READINGS

The screenshot shows the 'Physical Asset Maintenance' application window. The top navigation bar includes tabs for Main, Integration, Maintenance, Inventory, Usage, Security, History, Service, Schedules, Custom, Notes, and Analysis. The 'Usage' tab is active. The asset details are as follows:

- Code: 1075
- Serial #: ADMES
- Desc: AD Main Engine starboard 130117
- View: All
- Owner: Freehills Toyota
- Custodian Org: Freehills Toyota
- Custodian Contact: [Empty]
- Location: AK.AD
- Class: V.MES
- Deflt. Service Lvl: 0
- Barcode: [Empty]
- Physical Asset (selected) / Intangible
- Manufacture Date: / /
- Warranty Expiry: / /
- Status: Active
- Type: Main Engine Starboard
- Parent: 1040
- Asset Group: This Asset Group (selected) / All Assets
- Asset List:
 - Adventurer (AD)
 - AD Main Engine starboard 130117 (ADMES)
 - AD Turbochargers (ADMES)
 - AD cylinder Heads (ADMES)

On the right side, there are several action buttons: Attachments (0), Replace or Repair, Change Location, Change Ownership, Change Owner/Location, Loan, Create Service Request, and Reconfigure.

| CRM | Asset Management | Bulk Usage Entry

This App enables a Bulk Asset Usage Entry form to record incremental readings against any asset. If the asset has child assets (sub components) which are also enabled for Usage tracking they will be updated with the same incremental usage value.

Note in descriptions that follow, ‘all components’ means “all components and subcomponents” (all assets where the entered asset is a parent or parent of a parent) from whichever level data is being entered.

Usage can be entered at any level of asset – parents and sub assets. The same hours will update to the asset entered in the Bulk Asset Reading form, plus all of its components.

The screenshot shows the 'Bulk Asset Usage Entry Form' window. It contains a table with the following data:

Date	Asset	Quantity	Reset
09/01/2017	ADMES	11	<input type="checkbox"/>
09 / 01 / 2017			<input type="checkbox"/>

The Bulk Entry screen inputs are as follow:

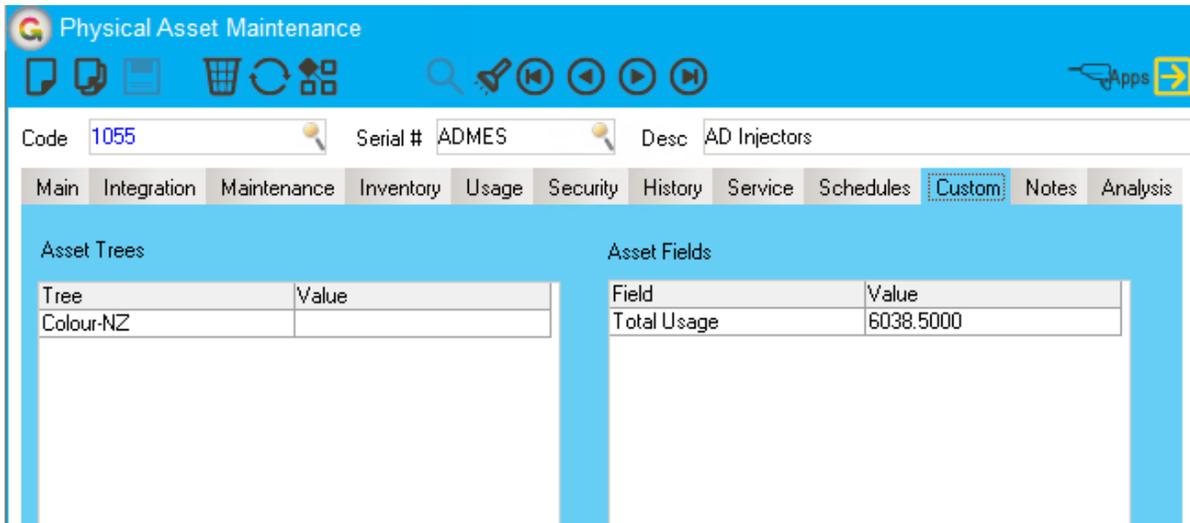
- Date** Date to record usage at.
- Asset** This is the serial number of the asset.
- Quantity** Incremental usage – will be added to the last reading for the asset.
- Reset** Tick if this asset should have current Usage set to zero *at the end of* update process. (Note that Total Usage is unaffected). This would normally only be ticked when a child asset is selected.

Example – 11 hours

When updated, 11 hours of Usage will be recorded against the parent asset ADMES plus any components of that asset (Ad Turbocharges and AD Cylinder heads per above screen shot), using the date of the bulk entry screen.

TOTAL ASSET READINGS

In addition, the Total Usage UDF is updated – this is the sum of the quantity field on all usage records for the asset.



It is possible for the total usage to be different from the current reading where the usage has been reset at some point.

Physical Asset Maintenance

Code 1055 Serial # ADMES Desc AD Injectors

Main Integration Maintenance Inventory Usage Security History Service Schedules Custom Notes Analysis

Base usage on Hours No of days history for Maintenance Cycle predictions 0

Date / / Test Quantity 0.0000 Save Line

Reading 0.0000 Entered By Cork

Quantity 0.0000 Service Request Extra 0.00

Notes

Date	Time	Reading	Quantity	Test Quantity	Service Requi	Entered By	Notes
13/07/2017	10:44:21 a.m.	5758.5000	1500.0000	0.0000		Cork	
18/01/2017	2:57:28 p.m.	4258.5000	7.5000	0.0000		Cork	
18/01/2017	2:56:58 p.m.	4251.0000	15.0000	0.0000		Cork	
18/01/2017	1:27:07 p.m.	4236.0000	4000.0000	0.0000		Cork	
18/01/2017	1:19:15 p.m.	236.0000	200.0000	0.0000		Cork	
13/01/2017	11:03:47 a.m.	36.0000	12.0000	0.0000		Cork	
10/01/2017	4:19:06 p.m.	24.0000	12.0000	0.0000		Cork	
10/01/2017	12:59:54 p.m.	12.0000	12.0000	0.0000		Cork	
10/01/2017	12:58:57 p.m.	0.0000	0.0000	0.0000		Cork	
10/01/2017	12:58:56 p.m.	280.0000	8.0000	0.0000		Cork	
10/01/2017	12:57:41 p.m.	272.0000	14.0000	0.0000		Cork	

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RESET READINGS

Bulk Asset Usage Entry Form

Date	Asset	Description	Quantity	Reset
21/08/2017	ADMES	AD Main Engine starboard	12	<input type="checkbox"/>
21/08/2017	ADMES	AD Turbochargers		<input checked="" type="checkbox"/>

The effect of these entries in the Bulk Form will be to:

1. Add 12 hours usage to parent and all components
2. Then reset the Turbochargers sub asset to zero.

IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

1. Log into Greentree as the **Super** user
2. Select the menu item | **System** | **Apps For Greentree** | **Apps Module Control** | 3.
Enter the New Registration Codes supplied and click Install App



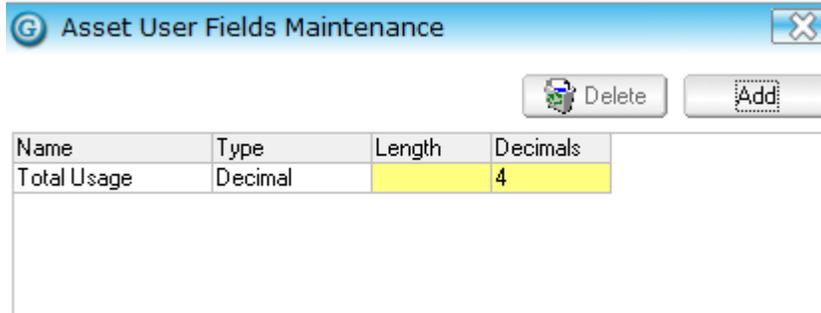
4. Select/Highlight the **Bulk Asset Usage Entry** App.
5. Click on the **Edit Users** button and select the users who will be configured to use Active Directory Integration, for which companies.



6. Once you have selected the users, **Save** the settings using the save icon in the header and **Close** the window.

GREENTREE CONFIGURATION

A UDF Total Usage is required to be created against Assets.



Name	Type	Length	Decimals
Total Usage	Decimal		4

APP CONFIGURATION

Not required for this App.