

Sisukord

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POOLELI - kasutamiseks alates 21.04.2022 !!!

LOW VALUE ASSET CHANGE

Document for changing information in the low value asset fields.

- **Low Value Asset change** document is created to change data (objects, project, department, user, in charge user, customer etc) on low value assets card.
- At least one asset must be entered on the low value asset change document.
- In the header - FILL - user, in charge user, department, objects, projects, customer, location (location ID), location fields (apartment, house nr, street, city) can be selected.
- **From the fine tuning** - more address fields than just Location (address ID) can be selected.
- The columns which **properties** are to be changed must first be activated by checking the **Edit field** in those columns.
- **Edit fields** - only fields that are marked as active can be changed.
- **Low Value Asset change** can also be initiated from the **low value asset card and asset inventory register** with **Change LVA**.
- Row fields can be added, removed and reordered.
- Row columns are locked by default. It is possible to unlock columns from the wrench next to the columns name.
- For each field that can be changed, a field with the previous (current) content can be added (for example "user" - "p user", "Department" - "P department") from the wrench above the rows.
- Low Value Asset change is **proceeded** if it is provided.
- Low Value Asset change is **confirmed**. Transaction INV_MUUTUS is formed (examples of the transaction below).
- New data is written to the rows and user tables (existing users and in charge users are terminated). The data in the related registers are changed (for example on the personnel tab in the Assets), etc.

The registry is located Finance → Documents → Low Value Asset change.

Low value asset card fields: **User, In charge user, Department, Location, Object, Project, Customer, Class, End date** can be changed. Allows to monitor the movement of assets and use information in a time-sensitive manner.



1. Document buttons

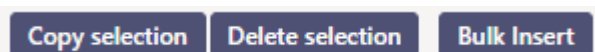
1.1. Header buttons






- **New** - opens a new unfilled document.
- **Save** - saves document.
- **Confirm** - confirms document.
- **Copy** - makes a copy of the document. The document has all the same assets as on the original document. There can be only one unsaved draft. Once the new document is saved, a new copy can be made.
- **Discard** - the button is active when the document is in draft status (an unsaved changes has been made to the transaction). After pressing the Discard button, the unsaved changes will be removed and the document will be in saved status.
- **Delete** - deletes the document. Asks in advance if you are sure you want to delete.
- **Attachments** - allows to attach files to the document.
- **Mail** - allows to send a document by e-mail.
- **Print** - prints the document.

1.2. Row buttons

-  - different asset fields can be added from here to be used as filters to add all assets that meet the given conditions at the same time.
-  - starts the placement from the first empty line based on the previous filters. At least one filter must be filled for the button to work.



- **Copy selection** - copies the selected rows to the copy buffer. To select rows, press on the row number. The button is not active if no rows are selected. Copied rows can be pasted from the row context menu (opens when you right-click on the line number) with „paste rows“.
- **Delete selection** - deletes the selected rows. To select rows, press on the row number. The button is not active if no rows are selected.
- **Bulk insert** - allows to fill/place rows based on a spreadsheet (mostly excel). The order in which the columns should be is listed in the HELP under the Bulk insert button.
-  - these buttons affect the height of the rows.
-  - for exporting table or selected rows to Excel.
-  - from this button row fields can be selected and unselected. Only selected fields are displayed on the document.

2. Document fields

2.1. Header fields

- **Number** - document number.

- **Date** - the effect time of the document and the time the transaction is created with.
- **Comment** - text field, is placed on transaction.
- **Document fillment** - the document fillment fields are optional, based on the document type and user. Different combinations of fields can be saved and displayed. The document issuer allows you to place many fixed assets at once, for example department ADMIN all fixed assets or user MALLE all fixed assets.

2.2. Row fields

The fields are set by default. The number and layout of the fields are editable - remove, add and reorder fields.

2.2.1. Informative non-editable fields

- **Code**- option from low value asset list. Code is placed.
- **LV ID**- low value asset ID. Selection from assets table. Code is displayed. When the quantity is 1, the LV ID is set automatically. If the quantity is bigger than 1, the appropriate low value asset must be selected in the LV ID field.
- **Name** - low value asset name (shown in Setup - Select additional asset information fields).
- **P User** - user code before changing
- **P In charge** - in charge user code before changing
- **P Department** - department code before changing
- **P Location** - location ID before changing
- **P Client**- client code before changing
- **P Class** - low value asset class before changing
- **P Object** - object(s) before changing
- **P Project** - project before changing
- **P End date** - the end date of the accounting before changing

2.2.2. Editable fields - for all users

- **User** - selection from the list of users, code is placed
- **In charge** - selection from the list of in charge users, code is placed
- **Department** - selection from the list of department, code is placed
- **Location** - location ID
- **Client**- selection from the list of clients, code is placed

2.2.3. Editable fields - with the rights inventory (asset) confirm

Settings → Common settings → User groups. User group SUPER module - inventar_vv confirm the module rights:

Change group rights "Superkasutaja"SaveView changelogCopy other groups rights

DocumentsReportsSettingOther

Delete row

NO	Module	Name	How	Browse	Columns	View	Add	Direct	Change	Delete	Confirm	Attachments	Folders	Print	Points
35	inventar_vv	Low value assets	all	All										Yes	

Adding the right of confirm, allows to change the following fields in the Low Value Asset Change document:

- **Class** - asset class code, low value asset class and all the class accounts are placed.
- **Object** - object or objects
- **Project** - project
- **End date** - the end date of the accounting

Pressing the spanner opens the option to add Edit fields:

NewSaveConfirmCopyDiscardDeleteAttachmentsMailPrint

Low value asset change DOKNew

CommonProceeding

NumberDOKDate25.03.2022 16:08:50Comment


DOCUMENT FILLMENT

ItemEnd dateSelect filtersFill document

Copy selectionDelete selectionBulk insert

No	Code	Description	Class	Object	Project	End date	Quantity	User	P user	In charge	P in charge	Department	P department	Location	P location	Customer	P client	P object
1																		
2																		
3																		
4																		
5																		
6																		
7																		
8																		
9																		
10																		
11																		
12																		
13																		
14																		

3. Fine-tuning

Button  on the right side of the header opens the fine-tuning settings.

Preferences

PersonalSystem

Select asset additional info fields

RestoreSave

- **Select location additional info fields** - Allows to add address information fields to document rows.
- **Select asset additional info fields** - Allows to add asset information fields to document rows.

4. Operation

1. Document is **generated** from register, low value asset card or from asset inventory document.

- Add new button from low value asset register generates empty document;
- Editable low value asset field is filled with low value asset code when document is generated from low value asset card;
- One or several low value asset data is editable when document is generated from asset inventory document (location, in charge etc);
- Only non written-off (> 0 active rows) low value assets can be placed on the document;

2. Document can be proceeded

3. Confirming the document:

- Document must have at least one editable feature;
- Time of the document must be later than the time of registration, last change of the low value asset;

4. As a result of confirming:

- New valid features are created in the table (the whole set, including those that were not changed). Previous features remain in the table, but are marked closed.
- Transaction is formed, entry type = INV_CHANGE.

5. The change can be opened from the confirmation if there are no subsequent transactions for the given fixed asset (change, depreciation, inventory, write-off, etc.)

5. Examples

5.1. In charge user and the department were changed

Low value asset change 100021 Confirmed

Common
Proceeding

Number
Date
Comment

100021
16.12.2021 11:40:51
Muutsin vastutajat ja objekti

DOCUMENT FILLMENT

Item
End date

Select filters
Fill document

Copy selection
Delete selection
Bulk Insert

No.	Code	Description	Quantity	In charge	P in charge	Department	P department	LV ID
1	VV003			MALLE	ROBIN	MYK	TOOTM	

From:

<https://wiki.directo.ee/> - **Directo Help**

Permanent link:

https://wiki.directo.ee/en/inventory_asset_change?rev=1649075273

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