

Sisukord

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Low Value Assets

The Low Value Assets card is intended for managing low value assets.

The Low Value Assets card works with the following documents

- The Low Value Asset change
- The Asset write-off
- The Asset inventory

The Asset Card and the Low Value Asset Card can not be used at the same time, the data does not move correctly and Directo does not correct errors due to incorrect use.

Settings

The following settings should be completed before creating low value asset cards:

- [Asset classes](#)
- [Locations addresses](#)

Low value asset card

NewSaveCopyDiscardDeleteAttachmentsMailPrintChange LVAWrite off

Low value asset VV001Saved

Last changed by (20.04.2022 at 15:50:56)

Related documents: purch invoice : 100094

CodeVV001Master

NameMedical device

ClassVV_3

Class nameVäikevarad grupp 3

TypeLVA - low value asset:

LeasingNo

Rental asset

Comment

BAR CODE

Closed

Data

DataFields

Value corrections

Users

ID

Actions

FISCAL DATA

Start date23.11.2021

Purchase price1000

Value correction250

End date

Purchase price total1250

Unit price178.57

PURCHASE DATA

Quantity7

Q off0

Q current7

Supplier1009

Supplier nameMeditsiiniseadmete OÜ

Purch invoice100094

Purchased01.01.2021

Item

SN

Disposed

Warranty

Extended warranty

Maintenance provider

Maintenance provider name

In maintenance

Maintenance

Next maintenance

ActionReceived free of chan

LOCATION

Department

UserJAAN

In chargeMALLE

ObjectMYK

Customer code61

Customer NameBanaanid OÜ

ProjectK201

Location

INSURANCE DATA

Insurance list

Insurance cover0

Insurer1007

Insurer nameApple OÜ

Comment

RENTAL INFO

Rental item

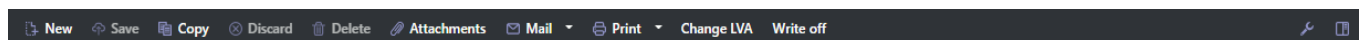
Rental unitMonth


Rental start

Rental end

1. Document buttons

1.1. Header fields



- **New** - opens a new blank document
- **Save** - saves the document
- **Copy** - makes a copy of the document. Only one unsaved draft can be opened at a time. Next copy can be made when new document is saved.
- **Discard** - The button is active when the transaction is in draft status or unsaved changes have been made to the entry. After selecting Discard, the unsaved changes will be removed and the transaction will be saved.
- **Delete** - deletes the transaction. Asks in advance if you are sure you want to delete. Only these low value asset documents can be deleted which have no operations performed (follow-up documents created etc).
- **Attachments** - allows to associate files with a document
- **Mail** - allows to send a document by e-mail
- **Print** - prints the document
- **Change LVA** - allows to make changes to the low value asset
- **Write off** - allows assets to be written off
-  - fine-tuning

- Option Select location additional info fields - allows to display various location additional information fields on the low value assets card. Display the required fields

Choose columns

Set: Personal Save and use Save as new set

Active columns

To change the order of columns drag it to the desired location.

NrNameHeaderWidthOrder

Copy another users settings

Copy

Unused columns

Find column

APARTMENTCITY/PARISHCOUNTRY

COUNTYHOUSEPLACE NAME

STREETZIP

- Option Select ID table client additional info fields - allows to display various client additional information fields on the low value assets card. Display the required fields

Choose columns

Set: Personal Save and use Save as new set

Active columns

To change the order of columns drag it to the desired location.

NrNameHeaderWidthOrder

Copy another users settings

Copy

Unused columns


Find column

@-INVOICE RECEPTIONACCOUNT MANAGER

ADDRESS2ADDRESS3

ALLOWED FORMULASATTACHMENTS

AUTO PRINTBALANCE

-  - allows to open the attachment view associated with the document

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

2. Document fields

2.1. Header fields

- **Code:** unique ID that can be entered manually or selected from double-click / right-click options
- **Name:** name of low value asset
- **Class:** asset class code - places the financial accounts and type related to the asset class, groups them in the low value asset reports. Selectable by double-clicking / right-clicking. Only classes with a low value asset type can be saved.
- **Class name:** asset class name
- **Type:** tangible asset TA/intangible asset ITA/low value asset LVA (depreciation is not calculated for low value assets)
- **Leasing:** options NO, Capital lease, Operating lease - information field for the acquisition of a low value asset
- **Rental asset:** checkmark. Allows to select this low value asset for lease contract. Opens the Rental Info section on the Low Value Asset card.
- **Master:** if the low value asset is a part of another low value asset, reports can be taken with the master asset.
- **Comment:** specifying field of the low value asset name
- **Bar code:** asset bar code
- **Closed:** checkmark

2.2. Data

2.2.1. Fiscal data

- **Start date:** usually low value asset purchase date. Related to the date of purchase. The start of the calculation can be in the same month in the past compared to the date of purchase. Future can be used.
- **Purchase price:** low value asset purchase price
- **Value correction:** total cost of low value assets additional amounts
- **End date:** blank by default. The date of write-off shall be the date of write-off.
- **Purchase price total:** adds up the purchase price and value corrections
- **Unit price:** calculates the price per unit

2.2.2. Purchase data

- **Quantity:** quantity can be bigger than 1. If low value asset is created from purchase invoice the quantity information is taken from the purchase invoice.
- **Q off:** low value asset written off quantity. Cannot be changed manually.
- **Q current:** low value asset current quantity. For example, if quantity was 5 pc-s and 1 pc was written off, then current quantity is 4 pc-s. Cannot be changed manually.
- **Supplier:** supplier code on purchase invoice
- **Supplier name:** supplier name on purchase invoice
- **Purchase invoice:** the purchase invoice number from which the low value asset card was created.
- **Purchased:** purchase invoice date

- **Item:** item code
- **SN:** serial number - information field
- **Disposed:** date
- **Warranty:** date
- **Extended warranty:** date
- **Maintenance provider:** maintenance provider code
- **Maintenance provider name:** name of the maintenance provider
- **In maintenance:** checkmark
- **Maintenance:** date (last maintenance / repair)
- **Next maintenance:** date (next scheduled maintenance / repair)
- **Action:** selection of different activities- purchase, received free of charge, improvements

2.2.3. Location

- **Department:** option of department tab
- **User:** option of the user tab, the code is placed
- **In charge:** option of the user tab, the code is placed
- **Object:** object or list of objects with commas
- **Customer code:** option of the customer tab, the code is placed
- **Customer Name:** name of the selected customer
- **Project:** option of the project tab
- **Location:** address ID

2.2.4. Insurance data

- **Insurance list:** checkmark, selecting will create an insurance list
- **Insurance cover:** the amount in which the low value asset is insured
- **Insurer:** insurance supplier code
- **Insurer name:** insurance supplier name
- **Comment:** text field

2.2.5. Rental info

- **Rental item:** an article that is placed on a low value asset contract as a line item or the article under which the low value asset is leased. The field is filled by default when you place an article on a low value asset on rental item field in item card. On asset card this field can be replaced.
- **Rental unit:** options - month, day, without sunday, workday
- **Rental start:** determines the date when low value asset is offered for rent. It can also be empty or only one of them can be empty.
- **Rental end:** determines the date low value asset lease expires

2.3. Data fields

Data fields can be used to add parameters that are not described on the Low Value Asset card and later use in reports. Data fields to be described [Lisaväljad](#). **LINK TULEB ÄRA MUUTA**

- **Type:** selection of additional fields described on the low value asset card

- **Content:** the contents of the data field selected in the selection line or added manually
- **Parameter:** text field

2.4. Value corrections

- **Date:** date - start of calculation
- **Value correction:** adding an amount
- **Object:** object or list of objects with commas
- **User:** option of the users tab, code is placed
- **Comment:** text field
- **Supplier:** option of the suppliers tab, code is placed
- **Supplier name:** selected supplier name
- **Document:** selection of the list (purchase invoice, expense, written off data, recalculation)
- **Number:** document number
- **Purchased:** date
- **Action:** selection of different activities- purchase, received free of charge, improvements

2.5. Users

- **Type:** low value asset type in the Personnel module. Selection of the drop-down menu.
Settings: [Vara ja personali vahendite seos](#)
- **LV ID:** a code is placed on each unit according to the quantity
- **User:** option of the user tab, the code is placed
- **User name:** user name is displayed (after saving), cannot be changed
- **Contract:** the document on the basis of which the low value asset was issued to the user. Text field. Not required
- **Close out:** option of the user tab, the code is placed
- **Close out name:** name is displayed (after saving), cannot be changed
- **Start date:** date of issue the low value asset to the user
- **End date:** date of return of the low value asset or termination of liability
- **Comment:** explanatory text. Not required

2.6. ID

- **LV ID:** code is placed on each unit according to the quantity
- **Department:** option of department tab, the code is placed
- **User:** option of the user tab, the code is placed
- **In charge:** in charge user name is displayed (after saving), cannot be changed
- **Customer code:** option of the customer tab, the code is placed
- **Object:** object or list of objects with commas
- **Project:** option of the project tab
- **Write-off date:** date, can be added only from the write-off document
- **Location:** address ID

2.7. Actions

Shows the activities performed with low value assets (purchase; users, departments e.t.c change;

etc.).

- **Date:** date
- **Action date:** date
- **Transaction time:** date
- **Action:** action type is displayed
- **Who:** user name is displayed
- **When:** action date
- **Value:** value sum (eg low value asset purchase price cost)
- **Transaction:** transaction number
- **Document:** related document number
- **Comment:** related document comment field information

3. Creating a new low value asset card

New low value asset card can be created as follows:

- From the purchase document
- From the expense document
- From the stock depreciation document
- From low value assets register
- By bulk importing low value assets cards

3.1. Creating a low value asset card from the purchase invoice document

Enter the purchase invoice, select an asset account in the Account field, to which the cost of low value assets must go.

No	Type	Account	Object	Project	User	Description	Total	VAT code	VAT	start	end	WIP	Corr.object	Corr.project	S.Receipt	Vendors invoice Subtotal	Resource	Expense	Asset
1		125361	ADMIN		JOHN	Computer Lenovo	10000.00	0	0.00			<input type="checkbox"/>							
2												<input type="checkbox"/>							NEW FA

After confirming the purchase invoice, a New LVA button will appear below the third dot at the top of the lines. By pressing the button, a new low value asset card opens with pre-filled information that can be queried from the purchase invoice and which remains directly related to that purchase invoice. Data is added automatically if you select an account in the purchase invoice that matches the account for the asset class.

Accounts: accounts are placed from asset class.

Maintenance, location and insurance data are for information purposes only and can be used as needed.

3.2. Creating a low value asset card from the expense document

After confirming the expense, a New LVA button will appear below the third dot at the top of the lines. By pressing the button, a new low value asset card opens with pre-filled information that can be queried from the expense and which remains directly related to that expense. Data is added automatically if you select an account to the expense which matches the account for the asset class.

Expense 100031 v2 - Work - Microsoft Edge

https://login.directo.ee/ocra_directo_jane/fin_kulutus.asp?me=0&clr1=1&number=100031&hoiatus=

Close New Copy Save Print OPEN << >> Transaction Status Confirmed

Expense Due Event

Number 100031 Date 08.03.2022 Survey

Expenders JOHN Expenders name John Brown

Trans date 08.03.2022 Signer Project

Type Asset Object

Person TRIINP Start to

Comment Computer purchase

Order Ordinance Ext. Id

Int comment

Last changed by: TRIINP 31.03.2022 12:13:13 Paste Recipe Bulk Insert

Currency EUR Vat Total 300.00 Subtotal 1500.00 Base 1500.00

Rate 1 Rate-D 0.00 To pay 1800.00

NEW FA NEW LVA ADD FA ADD LVA

NO	Type	Date	Start	End	Sum-T	Rate-D	PID	Asset	Asset
1		01.02.2021							
2									

3.3 Creating a low value asset card from the stock depreciation document

After confirming the stock depreciation, a New LVA button will appear in the end of the rows. By pressing the button, a new low value asset card opens with pre-filled information that can be queried from the stock depreciation and which remains directly related to that stock depreciation.

3.4. Creating a low value asset card from register

The Low Value Asset card can be created from the Low Value Asset register or from the Low Value Asset card.

Finance > Low Value Assets > Add new

There is no pre-filled data on the manually created low value asset card.

3.5. Creating a low value asset card from bulk import module

For large data amounts, it is convenient to use the bulk import module. Provides the ability to import a pre-formatted Excel spreadsheet with low value asset cards information into Directo and as a result, a corresponding number of low value asset cards are created in Directo. Large data updates are also possible through the same module.

Importing large data amounts, it is important to know that the type of asset must be given as a number in the prepared data table:

0 - low value asset 1 - tangible asset 2 - intangible asset 3 - written-off asset

4. The asset card is editable

System settings – Asset settings → Asset card is editable – NO/YES. By default the setting is YES

YES - all changes can be made directly on the asset card, but reports for an earlier period cannot be taken later - who was in charge etc.

NO - changes can only be made on the additional documents. Changes are saved and they can be reported in the past. Option **NO** allows to make changes in fixed assets and low value assets fields, which are not closed on asset card.

If System setting Asset card is editable → NO the fields below on the asset card will be locked, after depreciation has been calculated for the first time or another document has been issued (Change, Inventory).

Following fields are locked on the **Fixed asset card**:

- Code
- Class
- Type
- Calculation method
- Fiscal data (all the fiscal data on asset card)
- Accounts (all the accounts on asset card)
- Department
- User
- In charge
- Object
- Customer
- Project
- Proportion
- Cost object
- Cost project

Following fields are locked on the **Low value asset card**:

- Code
- Type
- Value correction
- Purchase price total
- Start date
- Purchase price
- End date
- Purchased
- Quantity
- Location
- Department
- User
- In charge
- Object
- Customer
- Project

5. Low value asset card confirmation

The low value asset card is not confirmed.

System settings→ Asset settings→Asset card must be confirmed (no/yes)applies only to fixed asset cards.

6. Low value asset quantity

If more than one similar low value assets are purchased at the same time, is possible to make a separate card for each low value assets or mark the purchased quantity to the quantity cell on one card.

There is a field to track the data for each individual piece **LV ID** and the data is shown on low value asset card tab **id**.

Low value asset MONITOR Saved Last changed

Code: MONITOR Name: Monitor Dell Class: VV Class name: Väikevarad Type: LVA - low value asset: ☐ Closed

Tab: ID (highlighted with a red box and arrow)

FISCAL DATA

Start date: 01.03.2022 Purchase price: 1200 Value correction: 0 End date: Purchase price total: 1200 Unit price: 400.00

PURCHASE DATA

Quantity: (highlighted with a red box and arrow) Supplier: Supplier name: Purch invoice: Purchased:

Separate data can be added to each LV ID

Data	DataFields	Value corrections	Users	ID	Actions						
<input type="checkbox"/>	No.	LV ID	Department	User	In charge	Customer code	Object	Project	Write-off date	Location	
	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	
	1	MONITOR.1	OFFICE	JAAN			ADMIN			01_ROOM	
	2	MONITOR.2	PROD	KAIE			PROD			102_5_Park	
	3	MONITOR.3	OFFICE	MARGUS			ADMIN			02_ROOM	

7. Address on fixed asset and low value asset card

7.1. Setting the addresses

Addresses can be configured Settings → Personnel Settings → Departments. Every address can have its own code. The address code **location** is placed on the fixed assets and small assets card. Enter the accuracy of the locations as needed. Use additional fields for location codes as desired.

Examples : Company has departments in Tallinn, Tartu, Võru.

- Location codes by city - TALLINN, TARTU, VORU
- Location codes by address - MOISA_4
- Location codes by floor - MOISA_4_7k, MOISA_4_9k
- Location codes by rooms (room numbers or names) - 01_ROOM, 02_ROOM

7.2. Entering addresses location codes

Address settings Settings > Personnel Settings > Departments Add location addresses on departments card at the bottom of the page. Enter asset location addresses to address rows.

Administration

CODE: OFFICE
 NAME: Administration
 SUPERIOR: JOHN »

Addresses

Code	Street	House	Apartment	Place name	City/Parish	County	Zip	Country
01_ROOM	Park	5		Room 1	Malton	Yorkshire	45878	En
02_ROOM	Park	5		Room 2	Malton	Yorkshire	45878	En

- **Code:** location code, can be entered manually
- **Street:** text field
- **House:** text field
- **Apartment:** text field
- **Place name:** text field
- **Zip:** text field
- **City/Parish:** text field
- **County:** text field
- Entering the location code for the first time, fill in all the address fields
- The same location code can be entered under the next department. In this case, enter the location code and the address fields will be filled automatically.

7.3. Use of address location codes

If departments are not in use, create a GENERAL department under which to enter all the desired location codes

- If a department is marked on the Fixed Asset and Low Value Asset card, you can select the locations marked under that department
- If a department is not marked on the Fixed Asset and Low Value Asset card, you can select all the locations
- Locations cannot be associated with objects or projects

7.4. Display location fields on the Fixed Asset and Low Value Asset card

The location code is in the data group **LOCATION** on the fixed asset card. More fields of the location code can be displayed under the Fixed Asset card fine-tuning - Asset location additional info fields.

8. User management

Low value assets can be linked to users with purpose to have an overview who owns or is responsible for the asset. Users are managed using the fields **User** and **In charge** on the asset main page or in the tab **Users** :



If the quantity of low value assets is bigger than 1 and different users have the low value assets, the users can be marked in tab **ID** and in tab **Users**.

Low value asset MONITOR Draft Last changed

Code MONITOR	Name Monitor Dell	Class VV	Class name Väikevarad	Type LVA - low value asset: ▼	<input type="checkbox"/> Closed
-----------------	----------------------	-------------	--------------------------	----------------------------------	---------------------------------

Data
DataFields
Value corrections
Users
ID
Actions

▼ FISCAL DATA

Start date 01.03.2022	Purchase price 1200	Value correction 0	End date	Purchase price total 1200	Unit price 400.00
--------------------------	------------------------	-----------------------	----------	------------------------------	----------------------

▼ PURCHASE DATA

Quantity 3	Supplier	Supplier name	Purch invoice	Purchased
---------------	----------	---------------	---------------	-----------

▼ LOCATION

Department	User	In charge KAIE	Object ADMIN	Project	Location
------------	------	-------------------	-----------------	---------	----------

8.1 Simple user management

Simple user management can be organized using the **User** and **In charge** fields. Persons from the Directo personnel register can be placed in these fields, who then will use or be in charge for the asset.



You can change the person codes on the low value asset card with simple user management, but the data history will not remain and the reports will not be viewable.

8.2 Detailed user management

More detailed user management can be done using the **Users** tab of the assets and the **Assets** tab of Personnel Card.

On Low Value Asset card **Users** tab can edit and add rows to the Personnel card tab **Resources** .

If the system setting The asset card is editable=NO is used, the user data can only be changed through an additional document [Low Value Asset change](#)

Data	DataFields	Value corrections	Units of production method	Users	Proportions	Actions			
<div>Copy selectionDelete selection</div>									
<input type="checkbox"/> No. ^	Type	User	User name	Start Date	End Date	Comment	Close out	Close out name	Contract
	Search	> Search	Search	> Search	> Search	> Search	> Search	Search	> Search
1	Computer ▾	BOB	Bob Brown	08.04.2022			HANNA	Hanna Maria	
2	▾								
3	▾								
4	▾								
5	▾								
6	▾								

Type- asset type in Personnel module. Selection from the drop-down menu. Setup: [Põhivara ja personali vahendite seos](#);

User- selection from users tab. Code is placed;

User name- user name is displayed (after saving), cannot be changed;

Start date- date of issue the low value asset to the user;

End date- asset return date or termination of liability;

Comment- explanatory text. Not required;

Close out- selection from users tab. Code is placed;

Close out name- name is displayed (after saving), cannot be changed

Contract- the document on the basis of which the low value asset was issued to the user. Text field. Not required;


If user is added to the low value asset card through Users tab, then it is immediately in the Assets tab of the corresponding person's personal card:

Employee Card

Close New Copy Refresh Save PRINT Change Photo F << >> Status: Changed

Survey Event

Code: BOB
Name: Bob Brown
Date of birth:
Gender: M
Group: SUPER
Object:



☐ User Module
 ☐ Employment Relationship
 ☐ Salary Module
 ☐ Education
 ☐ Documents
 ☐ Linked Persons
 ☒ Assets
 ☐ Skills
 ☐ Surveys (0)
 ☐ Proceeding
 ☐ DataFields
 ☐ Admin
 ☐ Actions
 ☐ Changes

NO	Type	Asset	LV ID	Description	Supplier	SN	Cost	Contract	Close out	Close outname	Start Date	End Date	Comment	Project
1	Computer	A109		Computer Dell			120000		HANNA	Hanna Maria	08.04.2022			
2														
3														
4														
5														
6														

8.3. Setup and usage options

8.3.1. Relation between assets and personnel assets

It is necessary to set the assets **Types**, in order to save assets lines to personnel card tab **Assets**. A list of asset types is created Settings→Personnel settings→Data Types→Asset:

https://login.directo.ee/ocra_directo_jane/settings2.asp?tyyp=PERSONAL

Directo settings

All

Find setting...

Q

System settings >

Common Settings >

Finance Settings >

Personnel Settings >

Absence types

Data types

Departments

Personnel Settings > Data types

☐ Employment Relationships

☐ Educations

☐ Documents

☐ Persons

☒ Asset

Close

Refresh

Save

Status: Changed

NO Name

1 Computer

2 Car

3


4

5

6

7

This table creates a list of asset groups as we want to systematize them in the Personnel module. This list does not have to directly match to the asset class list.



Rows without an asset type cannot be saved under personnel card assets. Read more in the Personnel Module Guide.

For **Asset class** is selected to, which personnel module asset type the given class corresponds to:

<https://wiki.directo.ee/>

Printed on 2025/06/07 16:22

Finance Settings > Asset classes > 125361

Back

New

Copy

Delete

Save

Status: View

View changelog

Computers and computer systems

CODE

125361

NAME

Computers and computer systems

AMORT ACCOUNT

125369

>>

DEPR ACCOUNT

551136

>>

STOCK DEPR ACCOUNT

551190

>>

ASSET ACCOUNT

125361

>>

SALES PROFIT

421101

>>

SALES LOSS

562111

>>

DEPR %

33,3333

TAXONOMY

▼

MASTER

1253


>>

PERSONNEL ASSET TYPE

Computer ▼

TYPE

Tangible assets ▼



The low value asset classes must be compiled in such detail, so that type comes correctly from class, if you want to use the low value asset types on the personnel card.

8.3.2. Setting: Asset has one active in charge user

Settings→System settings→Asset settings→Asset has one active in charge user: specifies whether there can be multiple end-dated rows in the Users tab at one time or not. In other words, can there be multiple users at the same time. Setting options: yes, no:

Yes- When a new user is added to the table, the previous user's row is „closed“ and its end date is automatically set to one day less than the new user's start date:

Data	DataFields	Value corrections	Units of production method	Users	Proportions	Actions			
<div>Copy selectionDelete selection</div>									
<input type="checkbox"/> No.	Type	User	User name	Start Date	End Date	Comment	Close out	Close out name	Contract
	Search	> Search	Search	> Search	> Search	> Search	> Search	Search	> Search
1	Computer	BOB	Bob Brown	01.03.2022	31.03.2022		HANNA	Hanna Maria	
2	Computer	JOHN	John Brown	01.04.2022			HANNA	Hanna Maria	
3									

Only the last line can be edited and deleted (previous users lines are locked). If you delete the last

line, the previous one becomes the active line and can be changed. Also the end date is removed from it.

No- all lines are freely editable. Except required fields that must be filled (Type, User, Start date). This means that the asset has multiple concurrent users and the asset is on a several personnel card.

Data	DataFields	Value corrections	Units of production method	Users	Proportions	Actions				
<div>Copy selectionDelete selection</div>										
<input type="checkbox"/>	No.	Type	User	User name	Start Date	End Date	Comment	Close out	Close out name	Contract
		<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
	1	Computer	BOB	Bob Brown	01.05.2022			HANNA	Hanna Maria	
	2	Computer	JOHN	John Brown	01.06.2022			HANNA	Hanna Maria	

8.3.3. System setting: Asset and personnel relation

Option **user** and **in charge** is intended for use, when the system setting Asset has one active in charge user=**Yes** is selected.

Specifies which field (user or in charge) on the low value assets tab is updated automatically, when a new user is added to the users tab (the field is locked and cannot be changed manually). This means that the selected field (user or in charge) always has the currently active user or in charge user.

Option **No relation** is intended for use, when the system setting Asset has one active in charge user=**No** is selected, then the fields User and In charge can be changed freely.

8.4. Reports

ON TÄIENDAMISEL !!

The reports **Asset list** and **Asset history** can be taken by a valid user or in charge user. It means the reports take into account the user / in charge user that are on the asset main page.

Therefore, it is reasonable to turn on the system settings **Asset and Personnel Relation** so that the Users tab active user is also a valid user or a in charge user on the main page.

Report - Asset list - Work - Microsoft Edge

https://login.directo.ee/ocra_directo_jane/yld_inventar_aru_nimekiri.asp?showall=jee&inventar=A110&inv_klass=&viide=&objekt=&osakond=&data1=&data1_t=&lisav_sel_item1=&d_klass1=INVE

Code: A110

Class:

In charge:

Object:

Department:

(Data field)

Description:

Comment:

Customer:

Supplier:

Start:

(Data field)

SN:

Take asset:

Project:

Date:

(Data field)

Sorted by: Date

Written off:

End:

(Data field)

User:

Subtotal:

User:

Valid:

(Data field)

LV ID:

Actions:

Class:

In charge:

User:

Department:

☒ asset

☒ capital asset

☒ intangible

☐ off

☐ Related

☐ money

☐ multiple datafields

☐ Closed

☐ dates

☐ Type

☐ Accounts

☐ insurance info

☐ Purchased

☐ customer

☐ master class

☐ action

☐ LV ID

Print

REPORT

JOHN

Code

Start date

User

Class

Object

Project

Department in charge

Code

Description

Comment

Bar code

SN

Quantity

A110

01.01.2020

JOHN

125361

BOB

A110

Computer Dell

1.00

1

1.00

Total quantity: 1.00

Total items: 1

9. Asset actions

[Asset actions](#) codes are created to monitor different assets actions.

For example, in the case of a purchase, the default code is „purchase“, the code can be changed before the first depreciation calculation or follow-up documentation is made.

Actions can be used in reports. Some activities appear on the asset card only through additional documents - Fixed Asset change, Low value Asset change, Fixed Asset recalculation, Asset write-off, Asset inventory.

10. Low Value Asset register

[Register](#) allows to sort, filter low value asset cards, etc.

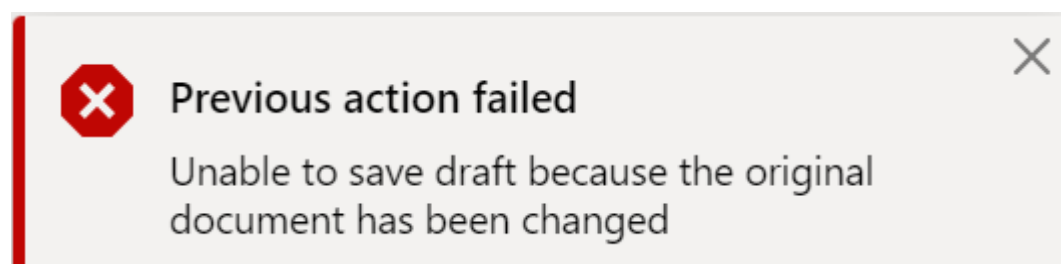
Buttons

- **Add new** - opens new empty low value asset card.
- **Browse** - entering the low value asset code in the Open code box, opens the low value asset card.
- **Open code** - when filling in the column filters, can click the View button to filter the selection.

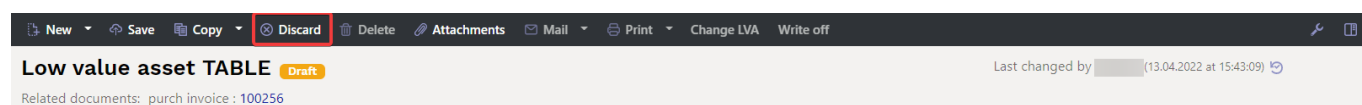
11. Frequently Asked Questions

11.1. How do I get rid of a draft?

- If a draft is left from document, cannot be saved and reports an error, then the error message can be removed by closing the asset card, reopening it and pressing **Discard**.



- In the Fixed Assets and Low Value Assets browser can display column **Draft** with button **Choose Columns** and filter the assets by draft.
- If there is a draft from document that you do not want to save, press **Discard**



All the changes, that have not been saved, will be deleted by pressing **Discard**.

Tab **Users** is empty

Data	DataFields	Value corrections	Users	ID	Actions						
<div>Copy selectionDelete selection</div>											
<input type="checkbox"/>	No. ^	Type	LV ID	User	User name	Contract	Close out	Close out name	Start Date	End Date	Comment
	Search	> Search	> Search	Search	> Search	> Search	Search	> Search	> Search	> Search	> Search
1											
2											

11.1.2. Changing Users and Departments through a Low Value Asset Change Document

New Save Copy Discard Delete Attachments Mail Print Change LVA Write off

Low value asset TABLE2 Saved

- If the Low Value Asset quantity is bigger than 1, the LVA ID must be selected manually

Low value asset change 100201 Draft

Last changed by (13.04.2022)

Common Proceeding

Number 100201 Date 01.04.2022 Comment LVA Tabel 2 change

DOCUMENT FILLMENT

Item End date Select filters Fill document

Copy selection Delete selection

<input type="checkbox"/>	No. ^	Code	LV ID
		> Search	> Search
1	TABLE2		
2	TABLE2		
3	TABLE2		
4			
5			
6			
7			
8			

Work - Microsoft Edge

https://login.directo.ee/ocra_directo_jane/t_list2.asp?unit=put_inventar_id&target=18&transmission=postmessage&otsing=8&inv_kood=TABLE2&postmessageid=externalPlacer

Close Refresh Clear fields Save view Settings Print

OPEN Browse

Rows: 20

LV ID ^	DEPARTMENT	USER	IN CHARGE	KLIENT	PROJECT	OBJECT
TABLE2.1			BOB			ADMIN
TABLE2.2			BOB			ADMIN
TABLE2.3			BOB			ADMIN

- After selecting LVA ID, activate the fields you want to change

Low value asset change 100201

Draft

Last changed by

Common

Proceeding

Number

100201

Date

01.04.2022

Comment

LVA Tabel 2 change

DOCUMENT FILLMENT

Item

End date

Select filters

Fill document

Copy selection

Delete selection

Bulk Insert

No.	Code	LV ID	User	P user	In charge	P in charge	Department	P department	Class	Object	Project	Quantity
	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search
1	TABLE2	TABLE2.1			BOB				VV	ADMIN		3
2	TABLE2	TABLE2.2			BOB				VV	ADMIN		3
3	TABLE2	TABLE2.3			BOB				VV	ADMIN		3
4												
5												
6												
7												
8												

Position

Freeze left

Freeze right

Unfreeze

Filter type

Text search

Select element

Shortcut

Edit fields (document specific)

- Fill in the fields and confirm the document

No.	Code	LV ID	User	P user	In charge	P in charge	Department	P department	Class	Object	Project	Quantity
	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search	Search
1	TABLE2	TABLE2.1	OTT		BOB	BOB	ADMIN		VV			3
3	TABLE2	TABLE2.3	JOHN		BOB	BOB	PROD		VV			3
2	TABLE2	TABLE2.2	KRISTI		BOB	BOB	SALES		VV			3
4												
5												
6												
7												
8												

Fill in the fields and confirm the document

- The confirmed document will have the field columns that were changed

Low value asset change 100201

Confirmed

Common

Proceeding

Number

100201

Date

01.04.2022

Comment

LVA Tabel 2 change

DOCUMENT FILLMENT

Item

End date

Select filters

Fill document

Copy selection

Delete selection

Bulk Insert

No.	Code	LV ID	User	P user	Department	P department
	Search	Search	Search	Search	Search	Search
1	TABLE2	TABLE2.1	OTT		ADMIN	
3	TABLE2	TABLE2.3	JOHN		PROD	
2	TABLE2	TABLE2.2	KRISTI		SALES	

11.1.3.The low value asset card change

The Users tab shows the changes made by date. Changes are visible when the user is changed.

Low value asset TABLE2 Saved Last changed by (13.04.2022 at 15:46:37)

Related documents: purch invoice : 100257

Code: TABLE2 Name: 3 Tables Class: VV Class name: Väikevarad Type: LVA - low value asset: ☐ Closed

Data DataFields Value corrections **Users** ID Actions

Copy selection Delete selection

No.	Type	LV ID	User	User name	Contract	Close out	Close out name	Start Date	End Date	Comment
1	vv1	TABLE2.1	OTT	Ott Mets		TRIINP	Triin Pukk	01.04.2022		LVA Tabel 2 change
2	vv1	TABLE2.2	KRISTI	Kristi		TRIINP	Triin Pukk	01.04.2022		LVA Tabel 2 change
3	vv1	TABLE2.3	JOHN	John Brown		TRIINP	Triin Pukk	01.04.2022		LVA Tabel 2 change

ID tab shows the last changes

Low value asset TABLE2 Saved Last changed by (13.04.2022 at 15:46:37)

Related documents: purch invoice : 100257

Code: TABLE2 Name: 3 Tables Class: VV Class name: Väikevarad Type: LVA - low value asset: ☐ Closed

Data DataFields Value corrections Users **ID** Actions

No.	LV ID	Department	User	In charge	Customer code	Object	Project	Write-off date	Location
1	TABLE2.1	ADMIN	OTT	BOB		ADMIN			
2	TABLE2.2	SALES	KRISTI	BOB		ADMIN			
3	TABLE2.3	PROD	JOHN	BOB		ADMIN			

Activities tab shows the change information

Low value asset TABLE2 Saved Last changed by (13.04.2022 at 15:46:37)

Related documents: purch invoice : 100257

Code: TABLE2 Name: 3 Tables Class: VV Class name: Väikevarad Type: LVA - low value asset: ☐ Closed

Data DataFields Value corrections Users ID **Actions**

No.	Date	Action date	Transaction time	Action	Who	When	Value	Transaction	Document
1	01.04.2022		01.04.2022	Between departments	TRIINP	13.04.2022 16:18:58		100201	100201
2	31.03.2022		31.03.2022	Purchase	TRIINP	13.04.2022 15:46:37	600		

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