ManagerPlus Pro
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Chapter 1
Introduction

This Chapter includes the following sections:

• System Requirements
• User Defined Fields
Welcome, and thank you for purchasing ManagerPlus Pro.

ManagerPlus designed ManagerPlus Pro to meet the most demanding maintenance needs. From monitoring routine maintenance, parts inventories, or asset tracking, ManagerPlus Pro encompasses all aspects of grounds, facility, equipment, and vehicle maintenance. The program’s integrated modules comprise one of the most powerful tools available to the maintenance industry.

ManagerPlus Pro Modules

The following sections are a brief description of the program modules.

Assets

The Assets Module contains the identity and description of each item to be maintained (vehicles, equipment, facilities, grounds, etc.) and assists in setting up maintenance schedules to provide notification when service work is needed. By using maintenance schedules, work orders can be generated when needed. Assets also contains a variety of reports.

Work Orders

The Work Orders Module generates work orders automatically when any scheduled item is due for maintenance; it also allows manual entry of work orders for special, nonscheduled, or emergency maintenance jobs. Work Orders has a variety detail and summary reports.

Inventory

The Inventory Module provides a fast and easy method of tracking, maintaining, and adding to your inventory. Inventory includes many reports such as overage and tracking/valuation reporting.
Logs

The Logs Module maintains an accurate listing of the hours and mileage that accumulate on the Vehicle and Equipment assets, a list of the fuel and oil used by each piece of equipment, and quickly add parts to inventory without going through the purchase order process. Logs also contain a number of reports.

Purchase Orders

The Purchase Orders Module allows automated purchasing and receiving of inventory and non-inventory items. The program creates purchase orders based on stock levels. Changes and adjustments can be made at any time from the creation and receiving of the purchase order. The module produces purchase orders plus a variety of reports.

Budgets

The Budgets Module tracks expenses and variances, which lets you know where your money is spent. By assigning a Budget ID to expenses, the program ties them to assets, work orders, inventory, and purchase orders. Budgets includes reports that detail and summarize every expense and budget.

Asset Tracking

The Asset Tracking module provides an easy method for assigning assets to an employee. You can quickly assign or return assets associated to employees, view a list of assets assigned to a specific employee, or find where an asset is located and who it is assigned to. Asset Tracking also provides several reporting options.

Chemical Applications

The Chemical Applications Module tracks the use of chemicals for grounds maintenance. Chemical Applications provides several reporting options.
Employee Management

The Employee Management Module contains a comprehensive listing of all employees, settings that affect how an employee is assigned to work orders and assets, along with a section for tracking certifications. Employee Management also contains reporting options.

Other Features

ManagerPlus Pro also provides these additional features:

- Help windows and lookup tables.
- A table of Work Descriptions for easy data entry in Assets and Work Orders.
- A history of expenses for each maintenance item.
- Optional Importer, Exporter, Request Module, Remote Work Order Module, Dashboard, Easylinks, and Asset Tracking features.

Operator’s Manual Organization

The ManagerPlus Pro Operator’s Manual was written to serve as both a tutorial and a reference. The chapters and sections are organized so that they correlate to the initial setup of the program. The manual also contains numerous screen captures, a glossary, and an index.

Chapter 1 - Introduction

The Introduction briefly explains the functions of the different elements of ManagerPlus Pro, the minimum and recommended system requirements needed to run the program.

Chapter 2 - Configuration & Operation

Chapter Two explains how to configure and operate ManagerPlus Pro. This chapter defines starting points for each module including what choices will appear in lookup windows and the names, pay rates and addresses of employees, among others.
Chapter 3 - Budgets

The Budgets Chapter explains how to create a budget or group of budgets and demonstrates how expenses against those budgets are created automatically and manually.

Chapter 4 - Inventory

Chapter Four explains how to create and maintain an inventory of items that will be used in the maintenance of assets.

Chapter 5 - Employee Management

Chapter Five explains how to create employee records, configure employee options, and create certification records.

Chapter 6 - Assets

Chapter Six explains how to create records for all property on which maintenance is performed. It also describes how to set up schedules for these items, which are referred to as Assets.

Chapter 7 - Purchase Orders

Chapter Seven explains how to automatically or manually generate purchase orders for parts and assets. It tracks them through receiving and places them in a historical file when they are completed. This module also maintains a detailed vendor list that contains names, addresses, and other important information about the companies where parts and assets are purchased from.

Chapter 8 - Work Orders

Chapter Eight explains how to create and print scheduled and nonscheduled work orders. In addition to printing work orders, the module also contains several summary and history reports.
Chapter 9 - Logs

Chapter Nine explains how to create and maintain logs that will keep a permanent record of the service that has been performed on all assets. On separate tabs, it keeps track of hours and miles for equipment, fuel and oil usage, and parts receiving.

Chapter 10 - Chemical Applications

Chapter Ten explains how to create and maintain records of chemical applications performed on Grounds assets.

Chapter 11 - Asset Tracking

Chapter Eleven explains how to assign out and return assets that are used by employees. This optional feature of ManagerPlus Pro provides an easy method for tracking who is assigned to an asset and the history of who has been assigned to an asset.

Appendices

Appendix A provides contact information for ManagerPlus.

Index

The Index includes comprehensive references to specific topics in the manual. The electronic version of the manual includes hyperlinks from the Index topic to the page(s) in the manual where the topic is found.
Typographic and Icon Conventions

This manual uses the following typographic conventions:

- Keyboard keys are enclosed by angle brackets (<>). Example: Press <Enter>, <Tab>, or <F1>.
- Key combinations (where more than one Keyboard key is needed to execute a command) are joined by a plus sign (+). Example: Press <ALT + A> means to hold down the <ALT> key on the keyboard until the letter <A> is pressed.
- Buttons as elements of a dialog on the computer screen are enclosed in straight brackets ([ ]). Example: Click [OK], [CANCEL] or [HELP]. In some cases, a small graphic representation of the button will be placed in the left margin of the page next to the reference.
- Information that is typed on the keyboard or keypad appears in bold face type. Example: Type C:\Setup.
- Pull-down menu instructions are capitalized and separated by a pipe ( | ).

**Example:** Click Modules | Assets | means to click Modules on the menu bar and then choose Assets option.

**Note:** This icon marks the location of additional information or a suggestion.

**Important:** This icon marks the location of important operational information or safety instructions.

**See Also:** This icon points to more information in the manual.

**Example:** This icon marks the location of an example that illustrates a point.
Shortcut Keys / Navigator Tool Bar

ManagerPlus Pro defines several standard buttons to make using the software easy. Many of the tabs and windows contain a special Navigator Tool Bar, which allows easy navigation between records. Table Intro-1 explains the function of each button and displays shortcut keys that can also be used to complete these tasks. Other buttons are available throughout the software.

Table Intro-1: ManagerPlus Pro Shortcut Buttons and Keys

<table>
<thead>
<tr>
<th>Button</th>
<th>Keyboard</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl-Ins</td>
<td>INSERT RECORD</td>
<td>RECORD</td>
<td>Adds a new record.</td>
</tr>
<tr>
<td>Ctrl+S</td>
<td>SAVE CHANGES</td>
<td></td>
<td>Saves the current record.</td>
</tr>
<tr>
<td>Ctrl+P</td>
<td>PRINT</td>
<td></td>
<td>Opens associated report module.</td>
</tr>
<tr>
<td>Shift+Ctrl+P</td>
<td>PRINT SELECTED</td>
<td></td>
<td>Opens associated report module and filters for the selected record(s).</td>
</tr>
<tr>
<td>F5</td>
<td>REFRESH</td>
<td></td>
<td>Update a table that has been changed by another user on a network version.</td>
</tr>
<tr>
<td>F6</td>
<td>CANCEL CHANGES</td>
<td></td>
<td>Cancel all changes to the current record.</td>
</tr>
<tr>
<td>Ctrl+Del</td>
<td>DELETE RECORD</td>
<td>RECORD</td>
<td>Deletes the current record.</td>
</tr>
<tr>
<td>Shift+F2</td>
<td>FIRST RECORD</td>
<td></td>
<td>Moves to the first record.</td>
</tr>
</tbody>
</table>
### Table Intro-1: ManagerPlus Pro Shortcut Buttons and Keys

<table>
<thead>
<tr>
<th>Button</th>
<th>Keyboard</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>F2</td>
<td>PRIOR RECORD</td>
<td>Moves to the prior record.</td>
<td></td>
</tr>
<tr>
<td>F3</td>
<td>NEXT RECORD</td>
<td>Moves to the next record.</td>
<td></td>
</tr>
<tr>
<td>Shift+F3</td>
<td>LAST RECORD</td>
<td>Moves to last record.</td>
<td></td>
</tr>
<tr>
<td>F4</td>
<td>EDIT RECORD</td>
<td>Edits the current record.</td>
<td></td>
</tr>
</tbody>
</table>

### Terms To Know

The following table contains some basic terms to know for easier reference in the manual. See Table Intro-2.

### Table Intro-2: Terms Used in This Manual

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click</td>
<td>Quickly press and release the left mouse button.</td>
</tr>
<tr>
<td>Double-click</td>
<td>Click the left mouse button twice in rapid succession.</td>
</tr>
<tr>
<td>Right-click</td>
<td>Click the right mouse button.</td>
</tr>
<tr>
<td>Drag-click</td>
<td>Click and hold the left mouse button, then drag the mouse into the resulting marquee or highlighted text to select the items.</td>
</tr>
<tr>
<td>Select</td>
<td>Mark or highlight an item so that an action can be performed on that item, or use the mouse or keyboard to start an action or command.</td>
</tr>
<tr>
<td>Check or Clear</td>
<td>Click inside a checkbox to select or enable an option (checkboxes are buttons that you can switch on or off). Click inside a checked box to clear the box and turn off or disable an option.</td>
</tr>
<tr>
<td>Field</td>
<td>A space or area for particular information (also called a box or text box).</td>
</tr>
</tbody>
</table>
Tool Tips

ManagerPlus Pro also uses Teletypes, a helpful feature where the user can hold the mouse pointer over a button for a moment without clicking, to display a small window with a short explanation of the button’s functions.

Date and Time

The software stores dates in the format of MM/DD/YYYY (for example, July 16, 2010 would be stored as “07/16/2010”). However, to type in a date the MM/DD/YY format is also available. For example, July 16, 2010 could be typed in as “7/16/10,” and the system would convert it to “07/16/2010.”

The software stores all time values in 24-hour or military time (for example, 2:15 p.m. is “14:15”). The system requires that all time values be typed in 24-hour format. An easy way to remember how to convert to 24-hour format is to add 12 hours to any times that are after noon.
Example: 3:35 p.m. would convert to 15:35 (3:35+12=15:35); 11:59 p.m. would convert to 23:59 (11:59+12=23:59).

Note: In 24-hour format, midnight is 00:00 and noon is 12:00; 24:00 does not exist.
System Requirements

To use ManagerPlus Pro, the server and client computers must meet the following minimum system requirements.

**Server Computer**

* A 100% IBM-compatible computer with a Pentium IV 1.6 ghz or greater processor is required.
* Windows 2000 Pro SP4, XP Pro SP2 or later, Vista (Business, Enterprise, Ultimate), Windows 7 (Professional, Ultimate) or 200x Servers with the latest service pack.
* 1024x768 16-bit or better video card
* A CD-ROM or DVD-ROM drive
* 1 gigabyte of RAM or greater.
* At least 750 megabytes of available hard disk drive space.
* Internet Explorer 6.0 SP1 or later
* SQL Server Express 2005 (provided on the installation CD) or greater

*Minimum requirements stated above for the Server Computer are based on 1-5 users and 1000 assets or less. If there are more than 5 users and 1000 assets, please contact technical support for custom system requirements.

**Client Computer(s)**

* A 100% IBM-compatible computer.
  * Windows 2000 SP4 with a 400 mhz Pentium II processor and 128 mb of RAM,
  * Windows XP SP2 or greater with a 600 mhz Pentium III processor and 256 mb of RAM, or
  * Windows Vista / 7 with a 1.6 ghz Pentium IV processor and 1 gb of RAM.
* All operating systems must be on the latest service packs.
* 16-bit or better video card
* A CD-ROM or DVD-ROM drive
Networks

ManagerPlus Pro is sold as either a single-user system (one user accessing the data at any one time) or as a multi-user system (two or more users accessing the data at the same time through a network). The program is compatible with TCP/IP networks.

**Note:** Even in a multi-user system, two users cannot modify the same record at the same time.

For more information regarding networks, please contact ManagerPlus. To upgrade from a single-user version to a network version, please contact the ManagerPlus Sales Department. See *Appendix A* for contact information.
User Defined Menu Items

The User Defined feature allows configuration links that will open other programs while remaining in ManagerPlus Pro.

**Example:** In addition to the parts and supplies required by its heavy equipment, a highway construction company also tracks and maintains its inventory of hazardous materials through ManagerPlus Pro. If a discrepancy appears after an audit of the explosives inventory, several local, state and national government agencies and law enforcement agencies must be notified. The company sets a menu item in the User Menu, so that a fax/communications program with a preset memo form named “Explosives Unaccounted For” can be opened from within ManagerPlus Pro.

To access User Defined, click User Defined from the main program menu. To create a new link to another program, click Edit. To open an existing link, click the appropriate menu item under Edit.

After the User Defined | Edit has been clicked, the Define Menu Items window opens. See Figure 1-1.
Click [New]. The program creates a temporary item called New Menu Item.

**Title**
Type in a meaningful name for the file or program that this User Menu item will be called. Be sure to remove the default name “New Menu Item.”

**File Name**
Type in the path and name of the file or program that the User Menu Item is to open, or browse for the file or program by clicking on the [Ellipsis] button. See Figure 1-2.
Parameters
If the program or file that is being loading is DOS-based, type the parameters or switches that the program needs to operate in the preferred way.

Default Dir (Directory)
Type in the directory where the file or program is kept. If the Browse function is used to fill the File Name field, the program will automatically populate this field.

Window State
Click the drop-down button and select the preferred way that the item is to appear. Normal is the default, but Minimized or Maximized can also be chosen.

Auto Load
Click this checkbox if ManagerPlus Pro is to load this file or program at the same time that ManagerPlus Pro is loaded.

Once it is finished, define the new User Menu item, and click [Exit].
Chapter 2
Configuration & Operation

This chapter includes the following sections:

• Introduction
• Configuration
• Operation
• Security
Introduction

After ManagerPlus Pro has been installed on the computer, there are some preliminary steps that should be taken before beginning to use it. Very few of the steps are required, but they will make the program easier to use and will give more accurate results.

This chapter includes a list of suggestions for first time users of the program. The suggestions give the best sequence to enter information that the program needs to operate efficiently.

Launching ManagerPlus Pro

After installation, run the ManagerPlus Pro program by simply double-clicking on the ManagerPlus Pro icon in the “ManagerPlus Pro” program group. The ManagerPlus Pro application window appears.

Application Window

The ManagerPlus Pro Application Window displays the date and time at the bottom. The Menu bar appears immediately below the Title bar. To select an option from the menu, click it with the mouse. Each menu item in the drop-down lists opens a window.

Immediately below the Menu bar is the Tool Bar, which has two groups of icons on it. Each button in the left group corresponds to the Modules menu items, while each button in the right group corresponds to the Reports menu items. See Figure 2-1.
Figure 2-1

Modules

Modules contain data fields, which are white boxes where information may be typed. Many input windows feature convenient lookup buttons that replace the need to remember information. Each Input Window is designed with tabs to quickly access summary and detail information. Simply click of these tabs to navigate through a module.

Note: Right clicking on the main window will give you the option to Show Status Labels. Status Labels provides summary information such as the number of active work orders.
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Configuration

The person responsible for using or supervising the use of ManagerPlus Pro (for example, the Admin), will need to make decisions regarding how the program is to be set up, and will need to configure how the program should act and respond. It is easier to make these decisions before the program is used, but changes can be made to the configuration at any time. If a feature of the program will not be used it does not need to be configured. The purpose of each configuration area is explained, and step-by-step instructions are given. By reading the description of each configuration option, the Admin should be able to determine if they would like to use each feature.

The Configuration section explains the various windows and procedures that appear in the program.

To access the Setup window, click File | Setup. See Figure 2-2.

![Figure 2-2](image)

Admin

A number of system-wide parameters can be set on the Admin tab.

The Admin tab has several sub-tabs. The General sub-tab is open by default. See Figure 2-3.

Configuration
General

Features that affect the program’s appearance or operation as a whole are listed on this sub-tab.

Figure 2-3

Default Labor Rate

The Default Labor Rate is the hourly pay rate that will be charged on a work order if the employee assigned to the work order does not have a Labor Rate assigned in the Employee Management module. The Default Labor Rate is also assigned to new employees added in the Employee Management module.
Fiscal Year
In the Date field, type the beginning date of the company’s current fiscal year. The Budgets Module uses this date to cycle budget and expense data.

End of Year Processing
The End of Year Processing button will reset the quantity values in the Received and Used fields in the Inventory module to zero at the end of the year (or at any other desired time). The value in the Received field is added to the Beginning quantity, and the Used field is reset to zero. If this action needs to be performed, click the [End Of Year Processing] button.

⚠️ Important: Proceed with care. This action cannot be undone.

Codes for Installed Modules
To enable a module, enter the appropriate code in each text box and click the [Save] button. Module codes are normally provided on your original sales documentation. To disable a module, double click the label, remove the code and click the [Save] button.

Company
On the Company sub-tab, type in the company name, address and phone numbers for your organization. The information entered will appear on reports and at the top of some windows. Adding information to this sub-tab is optional. To access Company, click the Company sub-tab. See Figure 2-4.
Company
Type in the appropriate information for your company

Lookup Tables
ManagerPlus Pro includes several lookup tables that provide a fast and easy way to select data for particular fields in many of the modules. Populating these tables in advance can save time during the initial setup. Also, selecting data for the fields from the lookup tables guarantees that entries will be consistent. Click the Lookup Tables sub-tab to access the lookup tables. See Figure 2-5.
Figure 2-5

Click any button to see the associated Lookup Table. See Figure 2-6.

Note: Lookup Tables can also be modified directly from each module by double-clicking the Lookup Table’s drop-down list.
All lookup tables can do the following:

- Add an entry by clicking on the [Add] button
- Delete an entry by highlighting it then clicking on the [Delete] button

Click the [Save] button to save any changes made.

**Asset IDs**

Lookup tables in this section allows you to set up information that will be used in the Assets Module.
**Asset Categories**

Asset Categories are used to organize your assets for sorting, reporting, and viewing purposes, and is the most general way of categorizing assets. Default Asset Categories include Equipment, Facility, Grounds, Vehicles and Tools. The Detail tab allows you to configure settings for each asset category.

**Asset Types**

While Asset IDs must be unique, Asset Types can encompass a number of similar assets to make sorting, reporting and viewing assets easier. For example, there may be unique Asset IDs set up for “PUMP 1” through “PUMP 50.” Then, it is possible to create an Asset Type called “PUMPS.” Asset Type is more generic than the Asset ID and typically includes all assets of a particular type. A Category must be assigned to each Asset Type. This can be done by selecting an Asset Type in the grid and clicking the Detail tab.

**Asset Groups**

Asset Groups provides another method for organizing assets for sorting, reporting, and viewing. Unlike Categories and Asset Types, which are directly related, Asset Groups provides an independent way to organize your assets. Asset Groups are typically used to describe a broader scope of assets such as FLEET VEHICLES, HEAVY EQUIPMENT, HVAC, BUILDING, etc. Asset Groups can also be used as the department, location, or division that is assigned to an asset.

**Schedules**

Lookup tables in this section allows you to set up information that will be used in the Asset Module’s Schedules tab.

**Schedule Type**

This lookup table provides a simple way to organize schedules for assets. Use any of the default entries, or change the list, to suit your needs.

**Work Orders**

Lookup tables in this section allows you to set up information that will be used in the Work Orders Module.
Work Descriptions
In the Work Descriptions table, you have the option of typing short
generic descriptions of all the tasks that are typically performed on your
work orders, so a list can be pulled when an asset’s maintenance sched-
ule is being set up or when filling out a work order.

Procedure: Adding a Work Description
1. In the Work Descriptions Lookup Table, click the [Last] button to
move the focus to the end of the list. Note the number of the last
description.
2. Click the [Add] button. A blank line opens with the prompt in the
Work Description ID field.
3. The Work Description ID field may contain numbers and letters.
Type in a text ID, or, if you use numeric IDs, type in any unassigned
number. A maximum of 10 characters is allowed.

Note: If a Work Description ID you attempt to assign is already in use,
the program will display an error message.
4. Type in a detailed description of the work. It can be up to 255 char-
dacters long.
5. Click the [Save] button to save the entry.

Inventory
Lookup tables in this section allows you to set up information that will
be used in the Inventory Module.

Part Type
Part Type is a way of grouping parts so that related items will be easier
to find and report. Several choices are included by default. Using Part
Type will help locate all of the parts for a particular task.

Part Location
For a parts room or warehouse that is organized with aisles, shelves,
bins, or a unique numbering system that defines where parts are kept,
you can list all of the locations here and attach those locations to the
parts.
Part Status
It is also possible to keep track of the condition and/or status of parts. Three choices are included by default: NEW, REBUILT and USED. The status list can be changed to suit your needs.

Chemical Physical States
This table allows the attachment of a physical state to the chemicals used in chemical applications. The basic states of chemicals are gas, liquid, and solid, but you may include others like powder or granular to help you better identify chemicals.

Other
Lookup tables in this section allows you to set up information that will be used in other areas of the program.

Sites
This lookup table groups ground assets that are maintained together. For example, you could fertilize nine of the greens on a golf course on the same day. By creating a site that includes those nine greens, you only have to enter the application information once rather than nine times.

Procedure: Creating a Site
1. In the Site Table Lookup, click the [Add] button. Click in the Site field, unless it is already highlighted.
2. Type in a detailed description of the site and then press <Enter>. The cursor moves to the Units field.
3. Click the drop-down arrow and select a unit of area measure for the site.
4. Click the [Save] button to save the entry.

Note: The three fields to the right of Units are read-only fields that are updated automatically when chemical application event data is entered into the program.

Area Units
This lookup table adds measurement units for defining an area. This information is most commonly used to calculate the area of a Grounds asset, so that a chemical can be applied appropriately.
To add an Area Unit, click [Add] and type the name or description of the measurement into the Units field. Then type the number 1 in the Amount Per Base Unit field and click [Save].

**Volume Units**

This lookup table adds measurement units for defining volume capacities. This information is commonly used to measure liquids in chemical applications or items in inventory.

To add a Volume Unit, click the [Add] button and type the name or description of the measurement into the Units field. Then type the number 1 in the Amount Per Base Unit field and click the [Save] button.

**Asset Tracking**

Lookup tables in this section allow you to set up information that will be used in the Asset Tracking Module.

**Location**

Use this table to list all the locations used in Asset Tracking module.

**Using Lookup Tables**

One of the most useful features of ManagerPlus Pro is how it allows adding items to the Lookup Tables from any module. On any field that has a Lookup Table assigned to it, double-click in the field and the system will open the Lookup Table window on top of the current window. Then add, change or delete items from the table. All of the Lookup Table windows have the same tool bar, which is slightly different from the tool bars on other windows. On these windows, the [PRINT] button has been replaced with the [SELECT CURRENT ITEM] button, which shows a checkmark.

After adding items to a Lookup Table from outside of the Setup window, you may exit using the standard Windows close button in the upper right hand corner, or click the [SELECT CURRENT ITEM] button. When the lookup tables are opened from Setup, the [SELECT CURRENT ITEM] button is disabled.

**International**

ManagerPlus Pro is designed to be used not only in the United States, but also in countries that use the metric system of measurement and
alternative spellings of common words. Currently, ManagerPlus Pro offers International settings for users in Canada and the United Kingdom.

To access International settings, click the International sub-tab. See Figure 2-7.

**Figure 2-7**

**Distance Units**
Click the drop-down button and select how you prefer to measure distances. The options are mile and kilometer.

**Fuel Units**
Click the drop-down button and select how you prefer to measure fuel. The options are gallon, liter, and quart.
Oil Units
Click the drop-down button and select how you prefer to measure oil. The options are gallon, liter, and quart.

Environmental Protection Agency (EPA)
Click the drop-down button and select the governmental agency charged with protecting the environment in your country. The options are EPA (the United States’ Environmental Protection Agency) and MAFF (the United Kingdom’s Ministry of Agriculture, Fisheries, and Food).

State/Province/County
Click the drop-down button and select the political unit into which your country is divided. The options are State (U.S.), Province (Canada), or County (U.K.).

ZIP/Postal Code
Click the drop-down button and select the scale you use to identify the numeric code used by your postal system. You may choose Zip (U.S.), P-Code (U.K.) or Postal Code (Canada).

Check/Cheque
Click the drop-down button and select the spelling of the word you use for a written order to a financial institution to pay money. The options are Check or Cheque.

Labor/Labour
Click the drop-down button and select the spelling of the word you use to describe the effort and time expended by your employees to accomplish work for your company. The options are Labor or Labour.

US Paper Sizes
Check the US Paper Sizes box if you wish to use U.S. paper sizes as the defaults on your printer settings. Leave the box unchecked if you do not wish to use U.S. paper sizes as the defaults.

When you are finished, click [Save].
Modules

This tab contains fields and options for customizing the individual modules of ManagerPlus Pro. To access the Modules tab, click Modules. The tab has several sub-tabs. Assets is open by default. See Figure 2-8.

Assets

This sub-tab contains user-defined fields that can be named and used to keep unique information on your assets, and other asset options.

Asset User Defined Fields

The fields in the Asset Module may not include everything needed to effectively run your business. The Asset User Defined Fields provide up
to 22 custom fields to add data specific to your needs. To use a field, type the name of the label you want to appear on the Assets | Detail tab into the field and click [Save] to save the changes.

Options
This group allows you to further customize your Assets Module.

Default Asset Detail Sub-Tab
Use the drop down list to select which sub-tab on the Asset | Detail window you would like to open by default.

Show Schedules Due At __% Due
Use the selection arrows to set the percentage due at which you want ManagerPlus Pro to change the status of an asset to WORK SCHEDULED.

Work Orders
This sub-tab contains four fields for Work Orders and four fields for Requests that can be renamed and used to add unique information to your work orders and requests, as well as other settings for the Work Orders Module. To access the Work Orders sub-tab, click Work Orders. See Figure 2-9.
Next Work Order #
The program needs to know where you want it to begin numbering work orders. Unless the operation is just starting up, you have probably already been issuing and tracking work orders. Set this field to the first work order number that will be used in the Work Orders module.

Example: You plan to begin generating work orders through ManagerPlus Pro after you use the last preprinted and numbered form in your supply cabinet, which is number 500. In this case, the Next Work Order # field should be populated with the number 501 since it will be the first system-generated work order.

Reset Schedules on Work Order
Click the option button that reflects which method you would like to use for resetting asset schedules.
Creation
Select this option to reset schedules for an asset at the time a work order is created.

Completion
Select this option to reset schedules for an asset at the time a work order is completed.

Work Order Reports

Show Labor Costs
Check this option if you want labor costs to show on work order reports.

Other Options
This group allows you to set additional defaults for the Work Orders Module.

Transfer Schedule Type To Code
Check this option if you would like the Work Order Code field to default to the Schedule Type when creating a work order from a schedule.

Lookup Code From Schedule Type
Check this option if you would like to display a drop-down list for the Work Order Code field that includes a list of Schedule Types.

Mark Up Parts By __ %
This field allows you to automatically increase the price of a part as it is added to a work order. Type in a percentage in the field. Setting the field at 0 does nothing to the part price on the work order.

Due Date
This group allows you to set options for automatically setting the due date for scheduled work orders.

Automatically Set Due Date for Scheduled Work Orders
Check this option if you would like the Due Date on work orders to be automatically set when a work order is created for a schedule.
Set Due Date for Non Calendar Based Schedules ___ Days In Advance
Set the number of days in advance you want the Due Date to be for non calendar based schedules. The number of days in advance is from the time a work order is generated from a schedule.

Work Order Log Option
Select an option from this group to set how your work orders interact with the Logs Module.

No Changes
Select this option if the fuel and oil amounts added in work orders are to be entered separately in Update Meters.

Adding Part Adds to Log
Select this option if the fuel and oil amounts added in work orders are to be added to Update Meters automatically.

Adding Part Replaces Log
Select this option if the fuel and oil amounts added in work orders are to replace amounts in Update Meters.

Requests User Defined Fields
The fields in the Request Module may not include everything needed to effectively run your business. The Request User Defined Fields provide up to four fields to add data specific to your needs. To use a field, type the name you want to appear on the Request form into the field and save the changes.

Work Order User Defined Fields
The fields in the Work Orders Module may not include everything needed to effectively run your business. The Work Order User Defined Fields provide up to four fields to add data specific to your needs. To use a field, type the name you want to appear on the Work Order form into the field and save the changes.

Purchase Orders
This sub-tab contains four fields that you can rename and use for keeping unique information on your purchase orders as well as a field for the
next PO number. To access the Purchase Orders sub-tab, click Purchase Orders. See Figure 2-10.

![Figure 2-10](image)

**Next Purchase Order#**

The program needs to know where you want to begin numbering purchase orders. Unless your operation is just starting up, you probably have already been issuing and tracking purchase orders. Set this field to the next number after the last one you will execute manually.

**Example:** You plan to begin generating purchase orders through ManagerPlus Pro after you use the last preprinted and numbered form in your supply cabinet, which is number 225. In this case, the Next Purchase Order # field should be populated with the number 226.
Purchase Orders User Defined Fields
The fields in the Purchase Orders Module may not include everything you need to effectively run your business. The Purchase Order User Defined Fields offer up to four fields you can use to add data that is specific to your needs. To use a field, type the name you want to appear on the Purchase Order form into the field and save the changes.

Default Purchase Order Notes
Type in notes that you would like to appear on your purchase orders by default. This may be a signature line, disclosure, time deliveries are accepted, a note indicating a packing slip must accompany invoice on deliver, or any information that may be required for your purchase orders.

Budgets
This sub-tab contains fields to set some defaults in the Budgets Module. To access the Budgets sub-tab, click Budgets. See Figure 2-11.
Next Expense Entry #
The program needs to know where to begin numbering expense items. Use this field to set the next expense entry number. Typically, this field is set at 1. If you will not be using the Budgets Module, you do not need to populate the Expense Entry # field.

Budget Expense Date Default
Use this option to set how you want the program to record Expenses in the Budget Module.

Invoice Date
Select this option if you want to record expenses using the invoice date. However, keep in mind that not all expenses will have an invoice associated with them.
**Check Date**
Select this option if you want to record expenses using the check date. However, keep in mind that not all expenses will have a check associated with them.

**Entry Date**
Select this option if you want to record expenses using the entry date. Entry Date is the recommended option since all expenses will have one. If you will not be using the Budget Module, you do not need to consider this option.

**Inventory**
This sub-tab contains user-defined fields that you can name and use to keep unique information on your inventory. To access the Inventory sub-tab, click Inventory. See Figure 2-12.
Cost Calculation
Select the Method that will be used for the part cost in the Inventory Module. Options are Last Cost and Rolling Average.

Inventory User Defined Fields
The fields in the Inventory Module may not include everything needed to effectively run your business. The Inventory User Defined Fields have up to four fields to add data that is specific to your needs. To use a field, type the name you want to appear on the Inventory form into the field and save the changes.

Logs
This sub-tab contains settings that will affect how the Logs module operates. See Figure 2-13
Enable Log Entry Warnings
Select this option if you would like to specify minimums and maximums for mileage, hours, and fuel entries in the Asset Module. The system will automatically create warning records in the Logs Modules to alert you when a log entry does not fit the specifications set for an asset.

Hours Meter

Hours Odometer
The Hours Odometer checkbox controls how the hours on your equipment assets will behave. If the checkbox is enabled, enter hours into the fields as a cumulative total. That is, each entry will be the reading on your hours meter for the asset, and is similar to reading an odometer on a vehicle. If the checkbox is disabled, enter the new hours that have accumulated since the last entry.
**Custom Meter**

**Field Name**
ManagerPlus Pro provides a custom meter type that can be used when the system provided meter types are not applicable to your operation. The default is Qty, but you may change the meter name to Units, Cycles, or any meter name that you choose.

**Odometer**
The Odometer checkbox controls how the custom meter will behave. If the checkbox is enabled, enter the value for your custom meter into the fields as a cumulative total. That is, each entry will be the reading on your custom meter for the asset, and is similar to reading an odometer on a vehicle. If the checkbox is disabled, enter the new custom meter value that have accumulated since the last entry.

**Cost per Mile/Hour Report Calculation**

**Log Entries**
This setting provides the most accurate calculation for values on the Cost per Mile/Hour Report. Select the setting that best describes when log entries are made into the system.

**Employees**
This sub-tab contains user-defined fields that you can name and use to keep unique information on your employees. To access the Employees sub-tab, click Employees. See Figure 2-14.
The fields in the Employees Module may not include everything needed to effectively run your business. The Employee User Defined Fields have up to six fields to add data that is specific to your needs. To use a field, type the name you want to appear on the Employees form into the field and save the changes.

**Certification User Defined Fields**

The fields in the Certification section of the Employees Module may not include everything needed to effectively run your business. The Certification User Defined Fields have up to four fields to add data that is specific to your needs. To use a field, type the name you want to appear on
the Certification section of the Employees form into the field and save the changes.

**Chemical Applications**

This sub-tab contains a single field that allows you to set the number for the next Chemical Application Entry the system will generate. To access the Chemical Applications sub-tab, click Chemical Applications. See Figure 2-15.

![Figure 2-15](image)

**Next Entry Number**

The program needs to know where to begin numbering chemical application entries. The field is typically set at 1. If you will not be using the Chemical Applications Module, you do not need to populate this field.
After all of the necessary changes have been made to the Setup fields, click [SAVE] to save the changes.

Click [EXIT] to close the Setup window.
Operation

After you have configured ManagerPlus Pro, you can begin entering the information the system needs to help manage your maintenance duties.

Preliminary Steps

ManagerPlus Pro quickly processes and retrieves information when it is properly prepared for the tasks you want it to perform. The time spent initially setting up assets, schedules, inventory, work orders, purchase orders, and budgets will be kept to a minimum if you are organized and prepared before entering data into the program.

Collect and prepare the following information before you begin entering data. Depending on the number of assets and parts that will be maintained, this preparatory process may be time intensive. However, it will help you use the program more efficiently once it is in normal operation.

1. Create a unique identification for each asset to be maintained. This can be numbers, letters, or a combination of the two. If consistent naming conventions are developed, your searches will be much easier.

2. Develop a list of maintenance procedures to be performed at specified intervals for each asset. (Example: “Change oil every 3,000 miles” for a pickup truck.) For equipment and vehicle maintenance, this information can generally be found in the operator’s or owner’s manual.

3. For budget purposes, assign each asset to a budget with a Budget ID. Each budget may have more than one asset assigned to it. If the Budget Module will not be used, use one of the default budgets provided.

4. Determine the starting work order number, the starting purchase order number, and the starting expense log number. (If you will not be using the Budget Module, skip the expense log number step.)

5. For each asset that bases maintenance on either distance traveled or number of hours operated: 1) collect the current miles or hours...
readings; 2) define all of its maintenance schedules; and 3) list what
tasks need to be performed for each maintenance schedule.

6. For each remaining asset: 1) determine when the next service is
due; 2) define all of its maintenance schedules; and 3) list what
tasks need to be performed for each maintenance schedule.

**Note:** There is potential for a great deal of repetition while setting up
assets. ManagerPlus Pro allows you to set up one asset, including sched-
ules, and then copy the asset. See the Copy Asset button on the Asset
Detail window.

**Example:** You buy 10 identical semi-tractor rigs, but you take delivery
and put them into service over a six-month period. All 10 vehicles will
have the same maintenance schedules, but the tasks will be performed
on different dates because of the different start-up dates and variations
in usage.

7. Collect the part numbers, suppliers, locations, and current on-hand
quantities of the parts you normally stock. Include fuel and oil if
you wish to track their usage.

8. Compile a list of employees, their addresses, and their labor rates.

9. For the Budget Module, compile a list of budgets such as rent, utili-
ties, supplies, insurance, and parts, so that you can assign expenses
appropriately. The Budget ID can also reflect a general ledger
account number.

**Getting Started**

Once the information has been gathered for ManagerPlus Pro, complete
the following steps in order:

1. **Install ManagerPlus Pro.** Please reference the installation Assist
documents provided on the installation CD. For system require-
ments, please reference Chapter 1: System Requirements.

2. **Set up budget(s).** Enter monthly budget amounts in the Budget
Module. Setting up Budgets is explained in Chapter 3.

**Important:** Using the Budgets Module is optional, however Budget ID
is a required field for most modules. If you are not going to use the Bud-
gets Module, you can use one of the default Budget ID’s.
3. **Enter vendors.** From Purchase Orders | Vendors, add all of the vendors from whom you purchase supplies or parts. Entering Vendors is explained in Chapter 6.

4. **Enter part locations.** From the Part Location Lookup Table in Setup | Admin | Lookup Tables, add all the locations needed before adding any parts. This allows you to use the lookup table when creating inventory records and will greatly speed up the record entry process.

5. **Enter parts inventory.** Enter all the inventory that is required to perform scheduled services on your equipment, grounds, and facilities. If you wish to track fuel and oil expenses for equipment, include those items in the inventory as you would a spark plug or a bag of fertilizer.

6. **Enter assets and their schedules.** Create a record for each asset that you wish to maintain. Create maintenance schedules for each asset.

7. **Enter employees.** Type in the names and labor rates of each employee. Address information is optional.

**Note:** The ManagerPlus Professional Services department can help you expedite the initial data setup. If you have current list of assets, inventory, and vendors in spreadsheet, our staff can import the data directly into ManagerPlus Pro. If your data is another program, we may be able to transfer it to ManagerPlus Pro. Please contact our Sales department for details on our services. See Appendix A for contact information.
Processing Information

The requirements for ManagerPlus Pro may differ for each user, so this section serves only as a guide or suggestion.

Periodic Processing

If periodic processing is performed consistently, managing your database will be quick and easy. ManagerPlus Pro processing tasks may need to be performed on a daily, weekly, monthly, or as needed basis.

- Daily processing may include such items as generating, processing, and completing work orders.
- Weekly, bi-weekly, and monthly processing may include such items as generating purchase orders, receiving inventory, and entering budget expenses.
- Processing to be performed as needed may include items such as adding, editing, or deleting employees, assets, and schedules.

**Note:** ManagerPlus strongly recommends that you backup your data files whenever the information in them changes. Backing up data files can be performed through SQL Server. Please reference the *Database Backup Assist* found on your installation CD or in the Help | Assists menu (requires internet access).

New Records

When you create a new record in many of the modules, some of the fields may be automatically populated. This will occur when there is a drop-down list with just one selection in it.

Change IDs

Occasionally, an ID may need to change after it has been assigned and saved. With the Change ID feature you can change the ID for any asset, schedule, part, vendor, budget, or budget group.

To change an ID, click File | Utilities | Change IDs. See Figure 2-16.
Figure 2-16
The Change ID’s window appears with ID Type set to Asset and the first Asset ID displayed by default. See Figure 2-17.

Figure 2-17
The Change ID’s window displays the following warning:
“WARNING: Changing ID’s may make existing printing records inaccurate.”

ID Type
This box contains six option buttons that allow you to select the type of ID to change. Choose from Asset, Schedule, Part, Vendor, Budget Group or Budget.

ID Fields
To the right of the ID Type box are two ID fields (three when Schedule is selected). When you click any ID Type, the label on the top ID field changes to match the type and lists all of the IDs for that type. Click the drop-down button and select the ID you wish to change.

When Schedule is selected as the ID Type, a previously hidden field named Schedule ID opens between the [Type] ID field and the New ID field. To change a Schedule ID you must select both an Asset ID and a Schedule ID. Then type in a new ID and click the [Change] button.

When you have finished changing IDs, click [Close].
ManagerPlus Pro offers the capability to require a user name and password to access software and set different user rights for your employees.

**Activating Security**

To activate ManagerPlus Pro’s security feature, from the main program window go to File | Setup. On the Admin | General sub-tab, enter the code for Security in the Codes for Installed Modules group. The code can be found on your original sales documentation. After entering the code, click Save.

**Setting up Security**

To configure Security, open File | Setup, and click the Admin | Security sub-tab. See Figure 2-18.
Enable Security

Check the Enable Security checkbox to enable ManagerPlus Pro security. Once you do so, users will need to enter a user name and password to open the ManagerPlus Pro software.

ADMIN User

When you activate security, the first user created is always an Admin user with full access to the software. This user’s User ID is always ADMIN.

Admin Password

Enter the password for the ADMIN user. If you leave this field blank, no password will be required for the Admin user.

---

Figure 2-18
**Add button**
Click this button to add a security user. You will be prompted to enter a User ID and Password for the user, and to confirm the password.

Once you add and save a new user, the User ID will appear in the list of users.

**Add Security Rights**
Once you’ve added a new user, you can add rights to that user profile by using the drop-down lists in the group boxes on the Security window.

For the application modules, there are six different levels of user rights for you to choose from: No Access, Read Only, Edit, Edit/Delete, Edit Add, or Full Access.

For the reports modules, security, and utilities, there are two types of user rights: Yes or No.

You may assign an employee to a user profile by selecting an employee from the Employee Selection drop-down list.

**Delete User**
Highlight a User ID in the list and click Delete button to remove a user profile.

**Change Password**
Highlight a User ID and click Change Password to change a user password.

There are two global security rights for you to set. Setting these rights will affect all users but the Admin user, whose global access cannot be changed.

**Hide Employee Labor Rates**
Check this box to hide employee labor rates for all users but the Admin user.

**Access to the Request Module**
Check this box if you want security users to be able to access the Work Order Request Module, which is an add-on module of ManagerPlus Pro.
Chapter 3
Budgets

This chapter includes the following sections:

• Introduction
• Adding and Editing Budgets
• Adding and Editing Expenses
• Budget Reports
Introduction

The Budgets Module allows you to track your expenses from purchase orders, work orders, and other expenses such as rent, utilities, insurance, and salaries. It also allows you to compare expenses to a budget. To access the Budgets Module, click the Budgets icon on the tool bar or click Modules | Budgets from the main program menu. See Figure 3-1.

![Figure 3-1](image)

The Budgets window opens to the Outline tab by default.

Budgets Tips

Several features of the Budgets window make viewing, searching, and sorting entries very easy.

Print

From any tab on the Budgets window, you can quickly access Budget Reports by clicking on the [Print] button. There are options to Print, Print Selected, and Export List. Print will open the Budget Reports window with no report search criteria set, while the Print Selected option will automatically set the report search criteria to the currently selected...
budget records. To select multiple budget records, hold the Ctrl key down and click each record. *Export List* has options to create a Microsoft Excel, HTML, CSV, or XML file with the data from the List tab.

**Search Criteria**

You may want to limit the number of groups, budgets and expenses that appear on the List tabs of this module. Setting Search Criteria is an easy way to sort and display only the records you want. See Figure 3-2.

![Figure 3-2]
**Example:** An organization’s maintenance budgets may be set up according to a department structure, and you would like to view only DEPARTMENT A-13 and DEPARTMENT C-12.

**Note:** Budgets DEPARTMENT A-13 and DEPARTMENT C-12 are used for example purposes. Your Budgets will be based on your data.

**Procedure: Search Criteria in Budgets Module**

1. By default, a search criteria line will appear in the Budget Criteria window. Select the search criteria line.
2. Click the pencil and paper icon to allow editing of the search criteria line. You may also double-click the line.
3. The first drop-down list contains fields that can be used in the search criteria. Verify **Budget ID** is selected.
4. The label between the drop-down lists allows you to specify an operator. Clicking on the label allows you to change the operator. Verify **is equal to** is selected.
5. The second drop-down list contains the data that is available for the field selected in the first drop-down list. Select DEPARTMENT A-13 from the list.
6. Click the plus icon in the upper right hand corner to add a new criteria line.
7. Repeat steps 1-5, but use the DEPARTMENT C-12 in place of DEPARTMENT A-13.
8. Click the label titled **AND** that begin the second criteria line. Select the **OR** option.
9. Click the OK button. The Budget List will now only display DEPARTMENT A-13 and DEPARTMENT C-12.

**Note:** This feature works the same way in Budget Reports

**Favorites**

You can save Search Criteria to a Favorites list so it can be reused at a later time. After setting your Search Criteria, click the **Save to Favorites** icon and type a name for your favorite. Click [Save] and your new Favorite will appear in your Favorites list.
Drop-Down Lists

Many drop-down lists can be modified directly from the module. To add, edit or delete drop-down list values, move your mouse over the field and double-click. An edit window will appear that will allow you to modify the list. When double-clicking, verify the list is not dropped down.
Adding and Editing Budgets

When you click the Budgets icon on the main window tool bar or click Modules | Budgets from the main program menu, the Budget window appears with the Outline tab open by default. See Figure 3-3.

Outline

The Outline tab displays the relationships of the different elements of your budgets in a tree view.

In Outline, a Group is depicted with the icon of a file folder. A Budget is depicted with the Budget icon. If the outline chart extends below the
bottom of your screen, use the scroll bar on the right edge of the window to move through the tree view.

Outline only shows you how your budgets are related. You cannot modify the Outline’s structure from the Outline tab. That can only be accomplished from the Groups and Budgets tabs.

Two Groups are included by default. Operation Costs is the group where you will place expenses associated with work orders. Purchasing Costs is the group where you will place expenses associated with purchase orders. The two types of expenses must be separate for the budgets to provide meaningful numbers.

Example: With a purchase order (PO), you buy 10 sprinkler heads at $5.79 each. You enter the PO for $57.90 as an expense in the Grounds Budget in the Purchasing Costs Group to show that the parts were ordered, received and placed into inventory. Within two weeks, a work order is generated to replace five broken sprinkler heads. The part costs on the work order, totaling $28.95, are entered as an expense in the Grounds Budget in the Operation Costs Group to show when and where the parts were used. Each expense is subtracted from the appropriate budget. If both expenses were entered into the same budget or the same group, the system would deduct $86.85 from the budget even though you actually spent only $57.90.

Groups

The Group tab has two sub-tabs, List and Detail. List is open by default. See Figure 3-4.
List

The List sub-tab shows the Group ID and a Description of each of your budget groups. A Group is a collection of one or more budgets that are related to each other. A group can only have budgets under it. You cannot have additional groups under a group.

Example: You could have a Group named Utilities to budget and track expenses such as electric service, gas service, water usage, and trash pickup. To accomplish this, you could have four budgets set up under Utilities called Electric, Gas, Water, and Garbage. The budgeted amounts and expense amounts in each of the four budgets would show you how much you planned to spend and how much you actually spent on each utility. The group would show the total of how much you
planned to spend versus the amount actually spent on utilities as a whole.

To add a budget group, click the [Add] button. To edit a budget group, select the budget group in the Groups | List tab. Double-click the selected record or click the Groups | Detail tab. See Figure 3-5.

![Figure 3-5]

**Detail**

The Detail sub-tab displays the Budget Group name and Description and totals for the selected group. In three separate columns it lists the Budget amount, Expense amount and Variance for each month of the year and totals for each column at the bottom. All of these fields are shaded, which means you cannot change them from this tab. The fields
are populated and updated automatically when you change the budgets that are placed under this group.

**Procedure: Adding a Budget Group**
1. From the Groups | Detail tab, click [ADD].
2. In the Budget Group field, type in the name of the new group.
3. Click in the Description field or press <Tab>.
4. Type in a description of the new group.
5. Click [SAVE] to save the group.

**Note:** You will not be able to type amounts into the 12 month fields. They will be populated and updated automatically by the budgets you place in this group.

**Procedure: Deleting a Budget Group**
1. From the Groups | List tab, highlight the Group you want to delete by clicking on it.
2. Click [DELETE].
3. The system displays a Confirm window that asks if you are sure you want to delete this record.

**Note:** If there are any budgets assigned to the group, the system will not allow you to delete the group. You must remove or reassign the budget(s) in the group first.
4. Click [OK].
5. The Group is deleted.

Click the Budgets tab to view or edit individual budgets.

**Budgets**

The Budgets tab has two sub-tabs, List and Detail. List is open by default. See Figure 3-6.
List

The List sub-tab displays all your budgets in a grid. The grid includes the Budget ID, Description, and Group ID of each budget. Use the scroll bar on the right side of the window to navigate through the list.

**Estimate Budgets By Changing Previous Year’s Expenses By ____%**

Use this feature to generate budgets for the new fiscal year by increasing or decreasing this year’s budgets by a percentage. Use the selection arrows to set the percentage you want to use.
Estimate Budgets

Click this icon to generate the new budgets based on the percentage you defined in the previous field.

To add a budget, click the [Add] button. To edit a budget, select the budget in the Budget | List tab. Double-click the selected record or click the Budgets | Detail tab. See Figure 3-7.

Figure 3-7

Detail

The Detail sub-tab shows details of a budget. You may modify the white fields under the Budget column, but not the shaded fields under Expense and Variance. Expense is deducted from Budget and the remainder is displayed in Variance. Expenses can be incurred from Work Orders, Purchase Orders or from transactions entered on the Budget | Expense
tab. (See the Expense section later in this chapter.) If the Expense amount totals more than the Budget amount in any month or in the totals, the Variance will be a negative amount.

**Budget ID**
Type in the name of the budget. When you save a new budget record, the fiscal year fields become visible and this field becomes read-only.

**Description**
Type in a detailed description of the budget.

**Budget Group**
Click the drop-down arrow and select the group that you want this budget assigned to. Groups are added on the Groups tab.

**Fiscal Year**
A Fiscal Year is added automatically if an expense is made during that fiscal year through purchase orders, work orders or from manually adding an expense (which is explained later in this chapter). If you want to add a fiscal year manually so that budgets may be created for it, click [Add Previous Year] or [Add Next Year]. If you want to delete a fiscal year, highlight it on the list and click [Delete Fiscal Year].

**Estimate Budgets**
The estimate budgets feature allows you to estimate a budget for the next fiscal year based on the current year’s expenses. To use this feature, enter the percentage by which you would like to increase your expense estimates, then click the [Estimate Budgets] button. The program generates monthly estimates and places them in the Budget column, where you may modify the figures.

**Budget Months**
Type in the monthly budget amounts for this budget. You do not need to type in a decimal point if the amount is a whole number. For example, type 5 and press TAB and the system enters $5.00; type 500 and press TAB and the system enters $500.00. Monthly budget entries may include cents. For example, if you type in 350.55, the system will display $350.55. These fields are not visible until the budget has been posted for the first time.
You will not enter information into the Expense by Month and Variance by Month fields. As you use ManagerPlus Pro, it will populate these fields automatically.
Procedure: Adding a Budget
1. From the Budgets | Detail tab, click [ADD].
2. Click in the Budget ID field and type in a name for the budget.
3. Click in the Description field and type in a description or explanation of the budget.
4. Click the drop-down arrow in the Budget Group field and select a Group for this Budget.
5. Click in the January Budget field and type in a budget amount.
6. Repeat step 5 for each remaining month.

Note: If you need to type the same number into each month field, you may copy and paste with two shortcuts. Highlight the number you want to copy and press <CTRL+C>. Then place the cursor in the destination field and press <CTRL+V>.

7. When you are finished, click [SAVE].

Procedure: Editing a Budget
1. From the Budgets | Detail tab, click [EDIT].
2. Click any white fields that you want to make changes to. The shaded fields cannot be changed.
3. When you are finished, click [SAVE].

Procedure: Deleting a Budget
1. From the Budgets | List tab, highlight the budget you want to delete.
2. Click [DELETE].
3. The system displays a Confirm window that asks if you are sure you want to delete this record.

Note: If there are any work orders, purchase orders, assets, vendors, or expenses assigned to the budget, the system will not allow you to delete the budget. You must remove or reassign the item(s) under the budget first.

4. Click [OK]. The budget is deleted.
Adding and Editing Expenses

ManagerPlus Pro has two ways of adding expense records. The program automatically creates expense records from all completed work orders and historical purchase orders. The other way to create expense records is to add them manually. You may have expenses that are not covered by work orders or purchase orders, such as rent, mortgage, bond payments, gas, water, or electricity service payments.

To access Expenses, click the Expense tab. The tab has two sub-tabs, List and Detail. List is open by default.

List

The List sub-tab displays a table listing all of your expenses. The fields displayed are Expense ID, Budget ID, Invoice #, Vendor ID, Description, and Amount. By clicking on the appropriate option button in the Sort By box you may reorder the list by Expense ID (the default), Budget ID or Invoice #. The List sub-tab displays both Expense entries that were created manually and automatic entries from the completion and posting of work orders and purchase orders. Any transaction that affects a budget will have an Expense entry. See Figure 3-8.
Use the scroll bar on the right to move through the records. To see more information about a record, select it and click the Details sub-tab, or double-click the record to open the Details sub-tab automatically.

**Figure 3-8**
The Details sub-tab shows more detailed information for an expense. See Figure 3-9.

On Expense entries created by the program, many of the fields are automatically populated. On a manual entry, all of the fields except Expense ID and Date must be entered by you.

**Expense ID**
The program assigns each expense item a unique identification number. It begins with the number configured in the Setup window.

**Date**
The program automatically populates this field with the current date.
Budget ID
Click the drop-down arrow and select the budget for the expense.

Vendor
Click the drop-down arrow and select a vendor. This field is optional.

Expense Description
Type in a meaningful description of the expense.

Invoice Number
Type in the invoice number, if an invoice exists for the expense.

Invoice Date
Type in the date of the invoice, if one exists for the Expense. This is a required field, so type the current date in the field if no invoice exists.

Check #
Type in the number of the check, if one was used to pay the expense.

Check Date
Type in the date of the check, if one was used to pay the expense.

Amount
Type in the amount of the expense. This is a required field.

Expense Date Override
When creating an Expense record, you may override the date the program uses to apply expenses towards the selected budget. You may select from Default, which is determined by your choice in Setup, or you may select the Invoice Date, the Check Date, or the Entry Date. Click the appropriate option button.

When you are finished adding or editing an expense record, click [Save].
You can generate and print several reports for your budgets and expenses. To access Budget Reports, from the main ManagerPlus Pro menu, click the Budget Reports icon on the tool bar, or click Reports | Budgets. See Figure 3-10. If you are already in the Budgets module, you can access Budget Reports by clicking on the [PRINT] button near the top left corner of the window.

![ManagerPlus Pro 2007 > User ID: A](image)

**Figure 3-10**

The Budget Reports window appears. See Figure 3-11.
Reports

There are three Budget Reports that you can view or print. To select a report, click the report icon. The following report choices are available.

1. **Budget Groups**
   This report displays the relationship of each Budget Group to the Budgets.

2. **Budgets**
   This report prints each Budget completely. It includes the amounts in the Budget, Expense, and Variance columns for each month. When you select this report, a Fiscal Years field appears. Use the arrows to select a from and to date for the budgets you want to print. Current and historical budgets are available.

*Figure 3-11*
3. Expenses
This report prints a list of all expenses and their details. When you select this report, a Fiscal Years group appears. Select a from and to date for the expenses you want to print. A Sort By group also appears when you select this report. You may sort the Expense records by Expense ID, Expense Date, Check Number, Invoice #, Invoice Date or Budget ID.

Search Criteria
Search Criteria for a report may be added before printing a report. For help with adding search criteria, please reference Figure 3-2 earlier in the chapter.

Fiscal Years
When you select the Budgets Report or Expense Report, a Fiscal Years group appears. Click the selection arrows to choose a year or range of years for the report. The default is the current year. To select a single year, make sure that both fields contain the same year number.

Page Breaks
When you select the Budget Groups Report or Budgets Report, a Page Breaks group appears with the following three options:

None
When you select this option button, the program decides the most appropriate place to split the report.

Budgets
Click this button to generate a report that page breaks by budget.

Groups
Click this button to generate a report that page breaks by group.

Sort By
Select the appropriate field from the Sort By drop down list to sort the report records. Each report may have different Sort By options.

Send To
You may select from several options to print a report. When you have made your selection, click the [Print] icon.
Chapter 4
Inventory

This chapter includes the following sections:

• Introduction
• Adding and Editing Inventory
• Inventory Reports
Introduction

Inventory allows you to add, edit, delete, and keep track of all the parts that you keep on hand and use for work orders. Parts are any physical item, such as belts and filters, that are used to complete one or more specific maintenance responsibilities. Inventory also keeps track of received, used, on order, and allocated quantities. Stocking levels may be set on each part which will trigger a purchase order when the quantity on hand drops below the minimum specified.

To access Inventory, click the Inventory button on the toolbar or click Modules | Inventory from the main program window. See Figure 4-1.

![Figure 4-1](image)

The Inventory window opens with the List tab selected by default.

Inventory Tips

Several features of the Inventory window makes printing, viewing, searching, and sorting the part list easier.
Print

From any tab on the Inventory window, you can quickly access Inventory Reports by clicking on the [Print] button. There are options to Print, Print Selected, and Export List. Print will open the Inventory Reports window with no report search criteria set, while the Print Selected option will automatically set the report search criteria to the currently selected inventory records. To select multiple inventory records, hold the Ctrl key down and click each record. Export List has options to create a Microsoft Excel, HTML, CSV, or XML file with the data from the List tab.

Search Criteria

You may want to limit the number of inventory records that appear on the List tab of this module. Setting Search Criteria is an easy way to sort and display only the records you want. See Figure 4-2.

![Search Criteria Example](image)

Figure 4-2
Example: An organization maintains a parts inventory that includes many different types of filters from several different vendors. All filters in ManagerPlus Pro have the Type field set to FILTER. As a parts manager, you want to quickly see a list of all filters from SMITH PARTS.

Note: Part Type FILTER and Vendor SMITH PARTS are used for example purposes. Your Part Types and Vendors will be based on your data.

Procedure: Search Criteria in Inventory Module

1. By default, a search criteria line will appear in the Inventory Criteria window. Select the search criteria line.

2. Click the pencil and paper icon to allow editing of the search criteria line. You may also double-click the line.

3. The first drop-down list contains fields that can be used in the search criteria. Select Part Type from the list.

4. The label between the drop-down lists allows you to specify an operator. Clicking on the label allows you to change the operator. Verify is equal to is selected.

5. The second drop-down list contains the data that is available for the field selected in the first drop-down list. Select FILTER from the list.

6. Click the plus icon in the upper right hand corner to add a new criteria line.

7. Repeat steps 1 and 2.

8. The first drop-down list contains fields that can be used in the search criteria. Select Vendor from the list.

9. The label between the drop-down lists allows you to specify an operator. Clicking on the label allows you to change the operator. Verify is equal to is selected.

10. The second drop-down list contains the data that is available for the field selected in the first drop-down list. Select SMITH PARTS from the list.

11. Click the OK button. The Inventory List will now only display only parts from SMITH PARTS with a part Type of FILTER.

Note: This feature works the same way in Inventory Reports.
**Favorites**

You can save Search Criteria to a Favorites list so it can be reused at a later time. After setting your Search Criteria, click the *Save to Favorites* icon and type a name for your favorite. Click [Save] and your new Favorite will appear in your Favorites list.

**Grid Options**

Common to most grids in ManagerPlus Pro are several features that allow you to quickly search, sort and customize data grids.

**Sorting**

To quickly sort data in grid, click the column title. A faded arrow pointing up will appear next to the column title indicating the data is being sorted in ascending order. To sort the data in descending order, click the column title a second time and a faded arrow pointing down will appear next to the column title.

**Quick Search**

Quick Search finds data based on the currently sorted column. With any record selected in the grid, begin typing the first few characters of the value you are attempting to find. The Quick Search feature will automatically move you to the first record matching the characters that you typed.

**Configuring**

Grid column sizes can be changed by holding your mouse down between the column titles and moving the border. Grid column order may be changed by holding your mouse down on a column title and moving it to the desired location. To add or remove columns in a grid, click the small button located in the upper left hand corner of the grid.
**Grouping**
To enable grouping of data by specific columns in the grid, right-click in the grid and select *Show Grouping*. If this feature is enabled, a section above the grid will appear allowing you drag and drop column headers for grouping grid data.

Drag a column header here to group by that column

**Drop-Down Lists**
Many drop-down lists can be modified directly from the module. To add, edit or delete drop-down list values, move your mouse over the field and double-click. An edit window will appear that will allow you to modify the list. When double-clicking, verify the list is not dropped down.
Adding and Editing Inventory

When you click the Inventory icon on the tool bar or click Modules | Inventory from the main program menu, the Inventory window appears with the List tab open by default. See Figure 4-3.

![Figure 4-3](image)

**List**

The List tab displays all your inventory parts in a grid. By default the parts are sorted by Part ID. Use the scroll bar on the right side of the window to navigate through the list.
To select a record, highlight it by clicking anywhere on its row. No data fields can be populated or changed from the List tab. To modify records click the Detail tab after highlighting a part record, or double-click its row.

Detail

The Detail tab shows specifics for a particular part record. See Figure 4-4.

![Inventory](image)

**Figure 4-4**

**Part #**

Type in a unique part number. You cannot have two parts with the same part number. You may use or develop your own part numbering system, or you may put the manufacturer’s part number here.
Vendor Part ID
If your part numbering scheme is different from the vendor’s, enter the Vendor Part ID in this field.

Description
Enter a meaningful description of the part. If you develop consistent naming conventions, you will be able to perform useful searches in this field.

Vendor
Click the drop-down arrow and select the main vendor who supplies you with the selected part. Vendor information is entered into the system on the Purchase Orders | Vendors tab, which is explained in Chapter 7.

Type
Click the drop-down arrow and select a type for the part. Type is a way to group parts that are related. For example, filters and belts.

Note: ManagerPlus Pro comes with several standard types already defined. If the Type you want is not listed, you may double-click the Type field and add the Type through the Part Type Lookup Table.

Location
Click the drop-down arrow and select the location where this part is physically located. If the Location you want is not listed, double-click the field and add the location through the Part Location Lookup Table.

Unit of Measure
Click the drop-down arrow and select the unit of measure that is used to keep track of the part. A part like an oil filter would be tracked by individual units, while a part like gasoline would be tracked by gallons.

Status
Click the drop-down arrow and select a status for the part. This field is for reference and can be set up any way you like. If the Status you want is not listed, double-click the field and add the Status through the Part Status Lookup Table window.

Active
The Active checkbox is checked for all new parts. Uncheck the Active checkbox to inactivate parts that you no longer use.
**Example:** A company that operates and maintains a large number of trucks could have windshield wiper blades that are NEW, starters that are REBUILT, a transmission that is USED, and tires that are RETREADS.

**Cost**
Type in your primary vendor’s cost for this part. This field may be modified if the price for the part changes. This amount will be used on purchase orders and work orders to figure parts costs.

**Quantities**
The fields on the Quantities sub-tab shows the quantity information you have on a part. The fields in the Stocking Levels group are adjustable. The Beginning field may be populated when you create a new part record. Once a part record is created and posted, the quantities in Received, Used, On Hand, Allocated, On Order, and Available are controlled by work orders and purchase orders and cannot be edited manually. After a part record has been created and posted, the Beginning field cannot be changed either.

**Stocking Levels**
The following three fields in this group determine the stocking levels.

**Minimum**
Type in the minimum quantity of the selected part that you want to keep on hand. The Reorder Report will print a list of all of the parts whose available quantity is less than the value in this field. If you populate the field with a zero, the system will never place the part on the Reorder Report. The Minimum Quantity also triggers Suggested Purchase Orders. Please see *Purchase Orders* in Chapter 7.

**Normal**
Type in the normal quantity of the selected part that you want to keep on hand. This figure is used to produce Suggested Purchase Orders and Reorder Reports. If the On Hand quantity falls below the number in the Minimum field, the Purchase Order module will suggest that you order enough units to bring it back up to the Normal level.
**Maximum**
Type in the maximum quantity of the selected part that you want to keep on hand. The Overage Report will print a list of all parts whose available quantity exceeds the value typed into this field.

**Beginning**
When you first create a part record, type in the initial part quantity. Once a part record is posted, you cannot change this number.

**Received**
This field reflects the total number of units of this part that have been received through the Purchase Order or Logs | Receiving Modules.

**Used**
This field reflects the total number of units of the selected part that have been used in the Work Order Module.

**On Hand**
This field represents the current number of units on hand. This total is determined by subtracting Used from the sum of Beginning and Received. \( \text{On Hand} = (\text{Beginning} + \text{Received}) - (\text{Used})\).

**Allocated**
This field represents the quantity of parts assigned to active work orders that have not been completed.

**On Order**
This field tracks how many units of this part are on active purchase orders that have not yet been received.

**Available**
This field represents the number of units that are available for assignment to work orders. \( \text{Available} = \text{On Hand} - \text{Allocated} \).
Chemical Information

The Chemical Information sub-tab allows you to assign a physical state and an EPA number to the chemicals you have listed in Inventory. See Figure 4-5.

![Figure 4-5](image)

### Physical State
Click the lookup button for a list of available states. If the appropriate physical state is not listed, double-click the field to access the Chemical Physical State Lookup Table window and add additional states.

### Fertilizer
Check this checkbox if the chemical is a fertilizer.

### EPA #
If applicable, enter the Environmental Protection Agency’s part number for this chemical here.

**Note:** If the Part Type assigned to the part is not Chemical, you will not be able to open this sub-tab.

### Alternate Parts
ManagerPlus Pro allows you to designate alternate parts on your inventory records. The alternate parts may be used to complete work orders.
when the primary part is out of stock, speeding your completion of maintenance schedules. To designate an alternate part, or parts, for something in your inventory, select the Alternate Parts sub-tab from the Inventory | Detail window. See Figure 4-6.

![Image of Alternate Parts tab](image)

**Figure 4-6**

**Note:** To designate an alternate part, you must have the alternate part entered in the Inventory Module first.

The Alternate Parts tab starts out empty. To add an alternate part, click the Add Part button. The Inventory Lookup dialog appears. See Figure 4-7.

**Note:** Make sure you are adding the alternate part to the correct part record. The Part ID for the record you have selected appears in the top middle area of the Inventory window.
Select the part you wish to designate as an alternate part, then click [OK]. The part is added to the Alternate Parts list. You may add multiple alternate parts for each part in your inventory.

**Part Usage**

This sub-tab shows which assets, schedules, work orders, and purchase orders currently use the selected part. The table on the sub-tab also lists the quantity of this part that the schedule requires. Double-clicking on a work order or purchase order record will take you to the record in the associated module. See Figure 4-8.

**Attachments**

Use the Attachments tab to add files to the part record such as a specifications diagram.
Adding, Editing or Deleting a Part

Creating and modifying records for the parts in your inventory is simple and easy. However, depending on the number of parts you keep in stock, it may be time consuming to add all of them into the Inventory Module initially. Be sure to schedule adequate time for this task.

Procedure: Adding a Part

1. From the Inventory window, click the Detail tab.
2. Click [ADD] on the tool bar.
3. The cursor automatically moves to the Part # field.
4. Type in the part number and press <TAB>.
5. Type in a meaningful description of the part and press <TAB>.
6. Click the drop-down arrow, select a Vendor for the part and press <TAB>.
7. Click the drop-down arrow, select a Type for the part and press <TAB>.
8. Click the drop-down arrow, select the Location of the part and press <TAB>.
9. Click the drop-down arrow, select a Unit of Measure for the part and press <TAB>.
10. Click the drop-down arrow, select a Status for the part and press <TAB>.
11. Type in the Vendor ID and Cost of the part.

12. On the Quantities sub-tab, type the Minimum, Normal, and Maximum stocking quantities into the appropriate fields. If necessary, type in the Beginning quantity.

13. If the Part Type is Chemical, click the Chemical Information sub-tab. If the Type is not Chemical, go to Step 17.

14. Click the Physical State drop-down arrow and select the chemical’s physical state. If the part is a fertilizer, check the Fertilizer box.

15. If applicable, enter the part’s EPA Number.

16. Click [SAVE] to save the record.

17. Repeat Steps 2 through 17 for the next part to be entered.

**Note:** The Copy Part button can expedite the input of your inventory records. If you have several parts that are similar, use the Copy Part feature to quickly create new part records.

**Procedure: Editing a Part**

1. From the Inventory window, click the List tab to display a list of all current parts.

2. Highlight the record you wish to edit by clicking on it, then click the Detail tab to display the populated data fields.

3. Click [EDIT] on the tool bar. (This step is optional.)

4. Change the appropriate fields by either typing in new information or clicking on the drop-down arrows and selecting new values.

5. If the Part Type is Chemical, you can click the Chemical Information sub-tab and edit that information. If the Part Type is not Chemical, go to Step 7.

6. Make appropriate changes to the chemical information, if necessary.

7. Click [SAVE] to save the changes to the record.

8. Repeat Steps 2 through 7 for the next part to be edited.

**Procedure: Deleting a Part**

1. From the Inventory window, click the List tab to display a list of all current parts.
2. Highlight the record you wish to delete by clicking on it, then click the Detail tab to display populated data fields, so you can verify that the correct part is being deleted.

3. Click [DELETE] on the tool bar.

4. The system asks you to confirm the deletion. Click [OK].

5. Repeat Steps 2 through 4 for the next part to be deleted.

**Note:** The system will not allow you to delete a part from Inventory if the part is listed in any other module, such as Assets, Work Orders, or Purchase Orders. You must remove or delete the part from all other modules before you can delete the part from Inventory.
You can generate and print several reports about your inventory. To access Inventory Reports, from the main ManagerPlus Pro menu, click the Inventory Reports icon on the tool bar, or click Reports | Inventory. See Figure 4-9. If you are already in the Inventory module, you can access Inventory Reports by clicking on the [PRINT] button near the top left corner of the window.

The Inventory Reports window appears. See Figure 4-10.
Reports

There are six Inventory Reports that you can view or print. To select one, click the option button next to the report title. Your choices are as follows.

1. **Current on Hand**
   This report provides a complete listing of inventory items and their current on-hand quantities.

2. **Reorder**
   This report prints all inventory items that have an available quantity less than the minimum level.

**Note:** To ensure that this report is accurate, make sure that all receiving entries and completed work orders have been processed before running it.
3. **Overage**
This report prints all inventory items that have an available quantity greater than their Maximum quantity level.

**Note:** To ensure that this report is accurate, make sure that all receiving entries and completed work orders have been processed before running it.

4. **Tracking/Valuation**
This report provides information necessary to reconcile current on-hand quantities as well as provide a total for current on-hand inventory.

5. **Count Sheets**
This report’s primary use is to assist you in performing physical counts of your inventory.

6. **Alternate Parts**
This report lists your parts, their locations, and any alternate parts you have associated with them.

**Search Criteria**
Search Criteria for a report may be added before printing a report. For help with adding search criteria, please reference Figure 4-2 earlier in the chapter.

**Sort By**
Select the appropriate field from the Sort By drop down list to sort the report records. Each report may have different Sort By options.

**Paper & Orientation**
Some reports can be printed in a Portrait or Landscape format. All reports print on an 8 1/2 X 11 sheet of paper.

**Send To**
You may select from several options to print a report. When you have made your selection, click the [Print] icon.
Chapter 5
Employee Management

This chapter includes the following sections:

• Introduction
• Adding and Editing Employees
• Certifications
• Employee Management Reports
Employee Management allows you to add, edit, delete, and keep track of employee demographic, labor, and certification information.

To access Employee Management, click the Employee Management button on the toolbar or click Modules | Employee Management from the main program window. See Figure 5-1.

The Employee Management window opens with the List tab open by default.

**Employee Management Tips**

Several features of the Employee Management window makes printing, viewing, searching, and sorting easier.

**Print**

From any tab on the Employee Management window, you can quickly access Employee Management Reports by clicking on the [Print] button. There are options to Print, Print Selected, and Export List. Print
will open the Employee Management Reports window with no report search criteria set, while the Print Selected option will automatically set the report search criteria to the currently selected employee records. To select multiple employee records, hold the Ctrl key down and click each record. Export List has options to create a Microsoft Excel, HTML, CSV, or XML file with the data from the List tab.

**Search Criteria**

You may want to limit the number of employee records that appear on the List tab of this module. Setting Search Criteria is an easy way to sort and display only the records you want. See Figure 5-2.
Example: An organization may contain many employees and several departments, and you are interested in viewing only employees assigned to the MAINTENANCE department.

Note: The department MAINTENANCE is used for example purposes. Your departments will be based on your data.

Procedure: Search Criteria in Employee Management Module

1. By default, a search criteria line will appear in the Employee Management Criteria window. Select the search criteria line.

2. Click the pencil and paper icon to allow editing of the search criteria line. You may also double-click the line.

3. The first drop-down list contains fields that can be used in the search criteria. Select Department from the list.

4. The label between the drop-down lists allows you to specify an operator. Clicking on the label allows you to change the operator. Verify is equal to is selected.

5. The second drop-down list contains the data that is available from the field selected in the first drop-down list. Select MAINTENANCE from the list.

6. Click the OK button. The Employee Management List will only display employees from MAINTENANCE department.

Note: This feature works the same way in Employee Management Reports.

Favorites

You can save Search Criteria to a Favorites list so it can be reused at a later time. After setting your Search Criteria, click the Save to Favorites icon and type a name for your favorite. Click [Save] and your new Favorite will appear in your Favorites list.

Selection

The Selection drop-down list located at the top of the List tab allows you to quickly change the criteria for data in the grid. The Selection list will contain some program default selections as well as any custom cri-
teria that was saved using the Favorites feature of the Search Criteria window.

**Grid Options**

Common to most grids in ManagerPlus Pro are several features that allow you to quickly search, sort and customize data grids.

**Sorting**

To quickly sort data in grid, click the column title. A faded arrow pointing up will appear next to the column title indicating the data is being sorted in ascending order. To sort the data in descending order, click the column title a second time and a faded arrow pointing down will appear next to the column title.

**Quick Search**

Quick Search finds data based on the currently sorted column. With any record selected in the grid, begin typing the first few characters of the value you are attempting to find. The Quick Search feature will automatically move you to the first record matching the characters that you typed.

**Configuring**

Grid column sizes can be changed by holding your mouse down between the column titles and moving the border. Grid column order may be changed by holding your mouse down on a column title and moving it to the desired location. To add or remove columns in a grid, click the small button located in the upper left hand corner of the grid.

**Grouping**

To enable grouping of data by specific columns in the grid, right-click in the grid and select *Show Grouping*. If this feature is enabled, a section above the grid will appear allowing you drag and drop column headers for grouping grid data.
Drop-Down Lists

Many drop-down lists can be modified directly from the module. To add, edit or delete drop-down list values, move your mouse over the field and double-click. An edit window will appear that will allow you to modify the list. When double-clicking, verify the list is not dropped down.
Adding and Editing Employees

When you click the Employee Management icon on the tool bar or click Modules | Employee Management from the main program menu, the Employee Management window appears with the List tab open by default. See Figure 5-3.

![Employee Management Window]

**Figure 5-3**

**List**

The List tab displays all your employees in a grid view. By default the Employee List is sorted by the last sort used and the Selection defaults...
to the last selection used. Use the scroll bar on the right side of the window to navigate through the list.

To select a record, highlight it by clicking anywhere in its row. No data fields can be populated or changed from the List tab. To go to the records where changes can be made, click the Detail tab after highlighting a part record, or double-click its row.

**Detail**

The Detail tab shows specifics for a particular employee. See Figure 5-4.

![Employee Management](image)

*Figure 5-4*
**Employee ID**
Type in a unique id to identify each employee. You cannot have two employees with the same Employee ID. You may use or develop your own employee numbering system.

**Name**
Enter the first, last and middle name of the employee.

**Status**
Select a Status for the employee.

**Department**
Select a department for the employee. (optional)

**Labor Rate**
Enter the employee’s labor rate. (optional)

**Allow Work Order Assignments**
Checking this box will allow the employee to be assigned to work orders and to be used on work order labor records.

**Allow Asset Tracking Assignments**
Checking this box will allow the employee to have assets assigned to them in the Asset Tracking module.

**Contact Info**
The fields on the Contact Info sub-tab provides address, phone and email information related to an employee and is optional.

**Address**
Enter the employee’s address information.

**Phone**
Enter the employee’s phone numbers.

**Email**
Enter the employee’s preferred email address.
Certifications

The Certifications sub-tab allows you to track certifications, trainings, licenses, education accomplishment and any other qualifications related to an employee. See Figure 5-5.

Note: Certifications can be customized to include up to four additional User Defined fields to describe a certification. To configure the User Defined fields for certifications please reference Figure 2-14 in Chapter 2.

Figure 5-5

Certification User Fields

This sub-tab provides you the ability to customize additional fields related to your employees. The fields may be renamed to Alternate Phone, Emergency Contact, Birthday, etc. in order to fit your organizations employee information. To configure the User Defined fields in this sub-tab please reference Figure 2-14 in Chapter 2.
Certifications List

The Certifications List tab displays all certifications for all employees. The list provides a quick summary of certifications that can be easily searched, sorted, and filtered. Double-clicking on a certification record will take you to the Detail | Certification sub-tab where you may edit the certification. See Figure 5-6.

![Certifications List Tab](image)

**Figure 5-6**
Adding, Editing or Deleting an Employee

Creating and modifying records for employees is simple and easy. The only fields required for an employee are the Employee ID and Status fields.

**Procedure: Adding an Employee**
1. From the Employee Management window, click the Detail tab.
2. Click [ADD].
3. In Employee ID # field, enter the employee’s id then press <TAB>.
4. Type in the employee’s name then press <TAB>.
5. Select a Status, Department, and Labor Rate then press <TAB>.
6. Check or uncheck options Allow Work Order Assignments and Allow Asset Tracking Assignments.
7. Complete the fields on the Contact Info sub-tab.
8. Select the Certifications sub-tab and enter all certification records.
9. Select the User Defined tab, if applicable, and complete the fields.
10. Click [SAVE].
11. Repeat Steps 2 through 10 for each employee to be entered.

**Procedure: Editing an Employee**
1. From the Employee Management window, click the List tab to display a list of all employees.
2. Highlight the employee record you wish to edit by clicking on it, then click the Detail tab.
3. Change the appropriate fields by either typing in new information or clicking on the drop-down arrows and selecting new responses.
4. Click [SAVE].
5. Repeat Steps 2 through 4 for each employee to be edited.

**Procedure: Deleting an Employee**
1. From the Employee Management window, click the List tab to display a list of all employees.
2. Highlight the employee record you wish to edit by clicking on it, then click the Detail tab.
3. Click [DELETE] on the tool bar.
4. The system asks you to confirm the deletion. Click [OK] to confirm deletion.

5. Repeat Steps 2 through 4 for each employee to be deleted.

**Note:** The system will not allow you to delete an employee if the employee is listed in any other module, such as Assets or Work Orders. You must remove or delete the employee from all other modules before you can delete the employee from Employee Management.
You can generate and print several employee reports. To access Employee Management Reports, from the main ManagerPlus Pro menu, click the Employee Management Reports icon on the tool bar, or click Reports | Employee Management. See Figure 5-7. If you are already in the Employee Management module, you can access Employee Management Reports by clicking on the [PRINT] button near the top left corner of the window.

The Employee Management Reports window appears. See Figure 5-8.
There are two Employee Management Reports that you can view or print. To select a report, click the report icon. The following report choices are available.

1. **Employee**
   This report provides a complete listing of employees with their contact and other descriptive information.

2. **Certifications**
   This report lists certifications for each employee. The certifications report provides an easy method for viewing the details for each employee’s trainings, licences, education and skills.
Search Criteria
Search Criteria for a report may be added before printing a report. For help with adding search criteria, please reference Figure 5-2 earlier in the chapter.

Sort By
Select the appropriate field from the Sort By drop down list to sort the report records. Each report may have different Sort By options.

Paper & Orientation
All reports are printed in a Portrait and on an 8 1/2 X 11 sheet of paper.

Send To
You may select from several options to print a report. When you have made your selection, click the [Print] icon.
Chapter 6

Assets

This chapter includes the following sections:

- Introduction
- Adding and Editing Assets
- Schedules
- Sub Assets
- Tires
- Asset Reports
The Assets Module is the heart of the ManagerPlus Pro program. It is where you set up your assets and maintenance schedules. Assets can include any item you want to track including equipment, vehicles, facilities, and grounds.

Maintenance schedules can include any type of routine job such as changing oil, charging a battery, performing an inspection, cleaning, or replacing the belts.

One of the major advantages of ManagerPlus Pro is the flexibility it gives you in defining and maintaining almost anything that needs scheduled maintenance. The Assets Module allows you to define assets at two levels, Assets and Sub-Assets, so that separate maintenance records can be kept for components such as an engine and tires, as well as the complete piece of equipment. Also, the module easily handles nonscheduled maintenance such as repairs, failures, or neglect.

To access the Assets Module, click the Assets icon on the tool bar or click Modules | Assets from the main program menu. See Figure 6-1.
Assets Tips

Several features of the Assets window makes printing, viewing, searching, and sorting easier.

Print

From any tab on the Assets window, you can quickly access Assets Reports by clicking on the [Print] button. There are options to Print, Print Selected, and Export List. Print will open the Assets Reports window with no report search criteria set, while the Print Selected option will automatically set the report search criteria to the currently selected asset records. To select multiple asset records, hold the Ctrl key down and click each record.
Search Criteria

You may want to limit the number of asset records that appear on the List tab of this module. Setting Search Criteria is an easy way to sort and display only the records you want. See Figure 6-2.

Figure 6-2
Example: An organization may have many assets that are divided into multiple asset types, and you are interested in viewing only assets that are assigned the Asset Type HVAC.

Note: The Asset Type HVAC is used for example purposes. Your asset types will be based on your data.

Procedure: Search Criteria in Assets Module

1. By default, a search criteria line will appear in the Assets Criteria window. Select the search criteria line.

2. Click the pencil and paper icon to allow editing of the search criteria line. You may also double-click the line.

3. The first drop-down list contains fields that can be used in the search criteria. Select Type from the list.

4. The label between the drop-down lists allows you to specify an operator. Clicking on the label allows you to change the operator. Verify is equal to is selected.

5. The second drop-down list contains the data that is available for the field selected in the first drop-down list. Select HVAC from the list.

6. Click the OK button. The Assets List will now only display only assets assigned the HVAC Asset Type.

Note: This feature works the same way in Assets Reports.

Favorites

You can save Search Criteria to a Favorites list so it can be reused at a later time. After setting your Search Criteria, click the Save to Favorites icon and type a name for your favorite. Click [Save] and your new Favorite will appear in your Favorites list.

Selection

The Selection drop-down list located at the top of the List tab allows you to quickly change the criteria for data in the grid. The Selection list will contain some program default selections as well as any custom criteria that was saved using the Favorites feature of the Search Criteria window.
Grid Options

Common to most grids in ManagerPlus Pro are several features that allow you to quickly search, sort and customize data grids.

Sorting
To quickly sort data in grid, click the column title. A faded arrow pointing up will appear next to the column title indicating the data is being sorted in ascending order. To sort the data in descending order, click the column title a second time and a faded arrow pointing down will appear next to the column title.

Quick Search
Quick Search finds data based on the currently sorted column. With any record selected in the grid, begin typing the first few characters of the value you are attempting to find. The Quick Search feature will automatically move you to the first record matching the characters that you typed.

Configuring
Grid column sizes can be changed by holding your mouse down between the column titles and moving the border. Grid column order may be changed by holding your mouse down on a column title and moving it to the desired location. To add or remove columns in a grid, click the small button located in the upper left hand corner of the grid.

Grouping
To enable grouping of data by specific columns in the grid, right-click in the grid and select Show Grouping. If this feature is enabled, a section above the grid will appear allowing you drag and drop column headers for grouping grid data.
Drop-Down Lists

Many drop-down lists can be modified directly from the module. To add, edit or delete drop-down list values, move your mouse over the field and double-click. An edit window will appear that will allow you to modify the list. When double-clicking, verify the list is not dropped down.
Adding and Editing Assets

When you click the Assets icon on the tool bar or click Modules | Assets from the main program menu, the Assets window appears with the List tab open by default. See Figure 6-3.

![Assets Window](image)

**Figure 6-3**
List

The List tab displays all your assets in a grid view. By default the Asset List is sorted by the last sort used and the Selection defaults to the last selection used. Use the scroll bar on the right side of the window to navigate through the list.

To select a record, highlight it by clicking anywhere in its row. No data fields can be populated or changed from the List tab. To go to the records where changes can be made, click the Detail tab after highlighting a part record, or double-click its row.

Colors can be customized according to each asset’s status: Inactive, Work in Progress, or Work Scheduled. To customize the color coding, right-click in the grid and select Custom Colors. By default, assets with scheduled work orders appear highlighted in red, assets with work orders in progress appear highlighted in green, and inactive assets appear in gray.

Show Inactive Assets
Check this box to include inactive assets in the list that is displayed on this window.

Detail

The Detail tab shows more information about the asset. Several of the fields include lookup windows that may have been previously configured. See Figure 6-4.
Figure 6-4

Asset ID

Type in a meaningful asset identification. If you have several identical assets, develop a naming convention and apply it consistently. You may use letters, numbers, or a combination. The maximum length of the asset id is 16 characters. Each Asset ID must be unique.

Example: If you have only one vehicle, and it is a Ford F-250 pickup truck, you could assign it an Asset ID of “F-250.” If you have five backhoes, you could call them “BACKHOE 01,” “BACKHOE 02,” “BACKHOE 03,” and so on.

Master Asset

If the record you are adding is for a sub asset (a component of another existing asset), click the drop-down arrow to select the primary asset with which the sub asset is to be associated. Sub assets are described in more detail later in this chapter.
**Category**
Asset Categories are Equipment, Vehicles, Grounds, Facilities and Tools. When selecting a Category, the Asset Type list will be automatically filtered for the asset types assigned to that category.

**Asset Type**
Click the drop-down arrow and select an Asset Type from the list you created in Setup. Asset Type is more generic than Asset ID and typically includes all assets of a particular type. In Setup, a category is assigned to each Asset Type. Equipment, Tools, Vehicles, Facility, Grounds, and Tools are the choices for Category.

**Example:** The maintenance manager of a city park and recreation department keeps track of two dump trucks, four pickup trucks, and twelve riding lawnmowers. Each item has a unique Asset ID, but the manager encompasses all of them with three Asset Types that put similar assets together for reporting purposes. The types are “dump truck,” “pickup truck,” and “lawnmower.”

**Note:** If you need to add, edit or delete a type, you do not have to go back to Setup. Double-click in the Asset Type field and the Asset Types Lookup Table opens. Add, edit, or delete entries as you would in Setup.

**Asset Group**
Click the drop-down arrow and select an Asset Group from the list you created in Setup. Asset Group is a broader way to distinguish assets than Asset Type and is used for reporting and sorting.

**Note:** If you need to add, edit, or delete a group, you do not have to go back to Setup. Double-click in the Asset Group field, and the Asset Group Lookup Table opens. Add, edit, or delete entries as you would in Setup.

**Budget ID**
Click the drop-down arrow and select a budget from the list you created in Budgets. Budget ID is used to collect expenses for the Budget Module. Each asset must have a budget assignment. If you are not using the Budgets Module, you should assign all of your assets to one of the default budgets in the list.
Description
Type in a meaningful description of the asset. If you develop logical, consistent descriptions, filtering only the records you want will be much easier. The description does not have to be unique. The field can contain up to 32 characters.

Example: For the Asset ID “F-250” mentioned earlier, the Description could be “1996 Ford F-250 pickup truck.”

Active
By default, this checkbox is selected, indicating that the asset is active. If you wish to make the asset inactive, deselect this checkbox. When you deselect the checkbox and save the asset, the status field in the middle of the window changes to INACTIVE. You cannot change an asset to inactive while there are active work orders for the asset. In this case, the field in the center of the window reads WORK IN PROGRESS.

Used in Asset Tracking
Check this box if this asset will be tracked in the Asset Tracking module.

Manufacturer
Type in the name of the company that manufactured the asset. This field will only be visible if the Category assigned to the asset has been configured to show this field.

Model
Type in the manufacturer’s model name or number for the asset. This may duplicate information in other fields. This field will only be visible if the Category assigned to the asset has been configured to show this field.

Serial Number
Type in the asset’s serial number. This field will hold up to 20 characters, and you can filter the records on it. This field will only be visible if the Category assigned to the asset has been configured to show this field.

Vendor ID
Click the drop-down arrow and select a vendor from the list you created in Purchase Orders. The vendor is the company or entity that you pur-
chased the asset from. This field will only be visible if the Category assigned to the asset has been configured to show this field.

**Fuel Part**
Click the drop-down arrow and select a part from the list you created in Inventory. This list only displays items from your inventory that have FUEL selected for the Part Type. Populating the Fuel Part field allows you to track fuel expenses for a piece of equipment. This field will only be visible if the Category assigned to the asset has been configured to show this field.

**Oil Part**
Click the drop-down arrow and select a part from the list you created in Inventory. This list only displays items from your inventory that have OIL selected for the Part Type. Populating the Oil Part field allows you to track oil expenses for a piece of equipment. This field will only be visible if the Category assigned to the asset has been configured to show this field.

**Tire Part**
Click the drop-down arrow and select a part from the list you created in Inventory. This list only displays items from your inventory that have TIRE selected for the Part Type. Populating the Tire Part field allows you to track tire expenses for a piece of equipment. This field will only be visible if the Category assigned to the asset has been configured to show this field.

**Copy Asset**
If you are entering many assets with similar details, the Copy Asset button is a convenient timesaving feature. With an asset’s details displayed, click the [Copy Asset] button. The program makes a duplicate of the asset’s record. You may choose to include Schedules, Parts, Attachment and User Fields when copying an asset. Using this feature can dramatically reduce set up time especially when you have many assets that are similar.

The Detail tab has several sub-tabs. The sub-tab that you selected in the Default Asset Detail Sub-Tab field in Setup will open by default.
Misc

The Misc sub-tab lists the following three groups: Purchasing, Current Totals, and Current Costs. See Figure 6-5.

### Purchasing

In the Purchasing group, type in the asset’s date of purchase and purchase cost, if such data is applicable. The Odometer field will appear if the asset’s Category field is configured to show the odometer field.

### Meter Totals

The Current Totals group lists two columns, Total and Trip. The Total column lists the number of hours or miles that the asset has logged and the amount of fuel and oil that the asset has used since it was purchased or created in the system. The Trip column lists the same information, but only includes numbers and amounts logged since the last time the meters were reset. The Trip column is a good way to track totals for a specific period of time. Click the Trip Start date to select date to begin the trip.

If an error occurred when readings were entered in the odometer or hours meters, you can adjust them.

### Cost Totals

The Current Costs box contains a summation of the fuel, oil, labor, parts and other costs incurred by an asset. These numbers cannot be changed from this window. They are a result of individual entries in the Work...
Orders, which are explained in Chapter 8, and the Logs, which are explained in Chapter 9.

**Depreciation**

To enter or view depreciation information for the asset, click the Depreciation sub-tab. This sub-tab can also be used to load an image of the asset. See Figure 6-6.

<table>
<thead>
<tr>
<th>Purchase Date</th>
<th>12/21/2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Cost</td>
<td>$1515.24</td>
</tr>
<tr>
<td>Useful Life</td>
<td>120 (Months)</td>
</tr>
<tr>
<td>Salvage Value</td>
<td>100</td>
</tr>
<tr>
<td>Depreciation per Month</td>
<td>$11.79</td>
</tr>
<tr>
<td>Accumulated Depreciation</td>
<td>$47.17</td>
</tr>
<tr>
<td><strong>Net Value</strong></td>
<td><strong>$1460.07</strong></td>
</tr>
</tbody>
</table>

- Straight Line Depreciation Method -

**Figure 6-6**

**Purchase Date**
Type in the purchase date of the asset in this field.

**Purchase Cost**
Type in the amount you paid for the asset.

**Useful Life**
Type in the projected useful life, in months, for the asset.

**Salvage Value**
Type in the salvage value you expect to retain for the asset.

When you have entered information in the four fields, ManagerPlus Pro calculates the depreciation per month, the accumulated depreciation, and the current net value of the asset, using the straight line depreciation method. Accumulated depreciation and net value are updated on a monthly basis.
Load
Use the Load icon to add a picture of the asset.

Remove
Use Remove icon to remove the picture from the asset.

Purpose
This sub-tab has a free text area where you can describe, in as much detail as you wish, the purpose or uses of this asset.

Specifications
This sub-tab has a free form text area where you can describe, in as much detail as you wish, any specifications for this asset.

Example: If the asset has an internal combustion engine, you could put the spark plug gap in the Specifications tab.

Warranty
This sub-tab has a free text area where you can enter, in as much detail as you wish, warranty information about the asset.

Notes
This sub-tab has a free text area where you can describe, in as much detail as you wish, any information about the asset that did not fit into the other fields.

User Defined
If you activated any of the 22 User Defined fields for Assets in the Setup window, they appear on this sub-tab. Populate them with data as needed.
Attachment

Use the Attachments tab to add files to the asset record such as a specifications diagram or an electronic bill of sale.

Parts

The sub-tab provides a method for associating parts from your inventory to a particular asset. This list is available in the Work Order module for each asset. Click the Add Part button to select a part from inventory and click the Remove Part to remove the association of a part to the asset.
Schedules

The Schedules tab contains information necessary to schedule and perform maintenance on an asset. The tab has three sub-tabs. List is open by default. See Figure 6-7.

**List**

The List tab displays all schedules for the selected asset. The label in the top middle of the window that begins with Asset ID: shows the selected asset. To add a schedule record, click the Add button for Schedules located in the second navigator tool bar just above the grid. To edit a
schedule record, select the schedule in the list and click the Detail tab or double-click the record.

**Detail**

When setting up a schedule, you must determine how the asset is to be maintained. See Figure 6-8.

An operator’s or owner’s manual can be helpful to determine scheduled maintenance. The fields on the Detail sub-tab are used to define the routine schedules for an asset. Schedules can be set up for preventative maintenance or any event in which you want a work order created. This can include annual licensing renewals or warranty expiration. A Schedule is a template for a work order. The information on Schedules is transferred to a work order when the schedule becomes due.
Figure 6-8

Choose a naming convention for Schedule #’s that will be easy to understand and will allow you to organize all asset schedules, such as PM 1, PM 2, PM 3. For the system to generate work orders correctly, assign the first Schedule ID (PM 1) to the schedule type with comes due least frequently. Assign the second Schedule ID (PM 2) to the schedule type with the next least frequent cycle. Continue this until all schedules with the same Schedule By (miles, hours, days) have a Schedule ID.

Schedule #

Type in a number for the schedule in the Schedule # field. Since each asset maintains its own schedule data independent of the other assets, you can use the same Schedule # for each asset. A piece of equipment may have four maintenance schedules, so you could name them “PM 1,” “PM 2,” “PM 3,” and “PM 4.”
Schedule By
The Schedule By field determines how the schedule interval will be measured. Click the drop-down arrow to select the schedule interval you want to use for this schedule.

Every
The Every field defines how often the schedule will come due. Type in a number to go with the Schedule By interval (for example, “Every 3 Months”; “Every 300 Hours”). The label at the right of this field changes automatically to reflect the Schedule By interval you selected.

**Example:** On a vehicle maintenance schedule, the operator’s manual recommends that you replace the spark plugs every 30,000 miles. Set the Schedule By field to MILES and the Every field to 30,000.

Supercedes
Click the drop-down arrow and select the Schedule ID for the schedule that the current schedule supercedes or replaces, if applicable. Some maintenance procedures are performed every time a maintenance schedule is due. Other procedures are performed every other maintenance cycle or every fourth maintenance cycle.

**Example:** On Schedule “D,” a vehicle’s engine oil and oil filter are to be changed every 7,500 miles. On Schedule “C,” the vehicle’s engine oil, oil filter, differential oil, and transfer case oil are to be changed every 15,000 miles. On Schedule “C,” you would put “D” in the Supercedes field.

Type
Click the drop-down arrow and select a Type for this schedule. The choices originate in the Schedule Type Lookup window in Setup. Type defines, in very general terms, what will be the major accomplishment of the schedule.

**Note:** If you need to add, edit, or delete a type, you do not have to go back to Setup. Double-click in the Type field and the Schedule Type Lookup Table opens. Add, edit, or delete entries as you would in Setup.

**Example:** If the goal of a schedule is to change the engine oil, assign the Type OIL CHANGE. If the goal of a schedule is to inspect an pump, assign the Type to INSPECTION.
**Reset**
If completion of this schedule should also reset another schedule, click the drop-down arrow and select the other schedule that should also be reset. Reset provides a way to create an either/or scheduling scenario.

**Example:** Cleaning an HVAC system may need to occur every 3 months or 1000 hours or operation which ever comes first. You would create two schedules for the inspection. A 3 month schedule and a 1000 hour schedule. On the 3 month schedule, you would choose the 1000 hour schedule for the Reset value and on the 1000 hour schedule you would choose the 3 month schedule for the Reset value.

**Last Completed WO #**
This field automatically displays the Work Order ID of the last work order completed for this schedule. It is blank until the first work order for this schedule has been completed.

**Assigned To**
If this schedule should be assigned to a particular employee by default, click the drop-down arrow and select that employee.

**Percent Due**
This progress bar lets you keep track of how soon this schedule will come up due. The progress bar will tell you what percentage of the cycle has been completed. When Hours/Miles entries are made in Logs for an asset, the progress bar automatically registers the change. Calendar based schedules automatically update according to your computers calendar. Once a work order is generated or completed, the bar resets to zero percent.

**Reset Schedule**
Click this button to open a Reset Schedule window where you can manually adjust the Percent Till Due field. The value displayed represents the last time the schedule was performed. The program interprets this amount as a percentage and repopulates the Percent Due field.

**Active**
By default, this checkbox is active. If you wish to deactivate the schedule, deselect the checkbox. However, you cannot deselect a schedule that has an active work order.
The Schedules Detail tab has three sub-tabs, Work, Parts, and Attachments. Work is open by default. See Figure 6-8.

**Work**

This sub-tab has a field that displays the different steps, procedures, or tasks that are required to complete the schedule. You may type instructions manually, or click the *Description of Work* lookup button in the upper left corner of the Work tab and select one or more of the tasks you defined in Setup under Admin | Lookup Tables | Work Description.

To select a task from the Work Description Table Lookup, hold down the <CTRL> (Control) key then click the task. As long as you hold the <CTRL> key down, you may continue to select as many additional tasks as you wish. When you have selected all the tasks you want, release the <CTRL> key and click the Lookup window’s [EXIT] button. The tasks are copied to the Description of Work field. See Figure 6-9.

![Figure 6-9](image)

Click the Parts sub-tab to select or view the parts that are associated with this schedule.

**Parts**

On this sub-tab, you can select and display the parts that will be needed to complete this scheduled maintenance. See Figure 6-10.
**Note:** Parts were put into the system previously through the Inventory Module. To add, modify, or delete parts from your inventory, you must access the Inventory Module. See Chapter 4.

**Figure 6-10**

**Procedure: Adding Parts to Asset Schedules**
1. On the Parts sub-tab, click [ADD].
2. Click in the Part ID field. It becomes highlighted and a drop-down arrow appears on the right end.
3. Click the drop-down arrow and a list of all parts in your inventory appears.
4. Click the desired part. The system places it in the Parts table along with its description and location.
5. Click in the Quantity field or press <ENTER> to highlight the Quantity field.
6. Type in the number of units needed to complete the work.
7. Repeat Steps 2 through 6 for each part you want to add to this schedule.
8. Click [SAVE] when you have added all the parts you need.

**Procedure: Deleting Parts from Asset Schedules**
1. Click anywhere in the line of the part you wish to delete, which will highlight it.
2. Click [DELETE].
3. The system asks you to confirm the deleting the part.
4. Click [YES].
5. The part is deleted from this schedule, though not from your inventory.

**Attachments**

On this sub-tab, you can select attachments associated with this maintenance schedule. To add an attachment to a schedule, click the *Select Attachments* button. A list of all attachments for the current asset will be displayed in a list. Check the box under the Selected field to include the attachment on the maintenance schedule. See Figure 6-11.

![Attachment Table](image)

<table>
<thead>
<tr>
<th>File Path</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inspection Requirements.xls</td>
<td>Inspection Req</td>
</tr>
<tr>
<td>Motor Specification.Doc</td>
<td>Motor Specs</td>
</tr>
</tbody>
</table>

*Figure 6-11*

To copy details of an existing schedule into a new schedule, click the Copy sub-tab.
Copy

There is a great deal of repetition in many maintenance schedules. The Copy feature allows you to duplicate a schedule, give the new schedule a name, and then modify it to suit your needs. Copying schedules can save you setup time. See Figure 6-12. If you are setting up many assets with similar maintenance schedules, it recommended that you use the Copy Asset feature described early in this chapter. The Copy Asset feature allows you to copy the entire asset details including Schedules.

Figure 6-12

Example: All of the greens on a golf course are maintained the same way. After you set up the Schedule for Green 1, you can copy the schedule 17 times and name each new green, “Green 2” through “Green 18.” You can then go back through each schedule and make adjustments.
Procedure: Copying an Asset Schedule

1. Make sure you are in the record of the asset for which you want to copy a schedule. (Check the Asset ID field on the tool bar below the Title bar.)

2. From the Copy sub-tab, click the Asset Schedule you want to copy. The system highlights the record.

3. Click the [COPY SCHEDULES] button.

4. The system switches to the Schedules | Detail tab for the asset and populates the fields with the data copied from the selected schedule.
Sub Assets

The Assets Module of ManagerPlus Pro allows you to define assets on two levels, primary and secondary-level assets. Primary level assets may include all the equipment, vehicles, facilities, and grounds you maintain. Their setup was described earlier in this chapter. However, the program also enables you to define a secondary level of assets, such as a motor, attachment, floor of a building, or any other sub-system on a primary asset. You define sub assets in the same way that you define primary assets; with the same level of detail in their records. You may then create maintenance schedules for the sub assets, and the program will notify you when they are due, just as it does with primary asset schedules. A Sub Asset is identical to an Asset with the exception that a Sub Asset has a Master Asset assigned to it in the Asset Detail window. See Figure 6-13.

To create a sub asset record, click the Assets icon on the tool bar or click Modules | Assets from the main program menu. The Assets window appears with the List tab open by default. Highlight the asset that you want to add a sub-asset record to, then click the Sub Assets tab. Initially the Sub Assets tab will be empty. See Figure 6-14.
To add a sub asset, click the [Add] button. The Asset Detail tab opens. You will add detailed information to the sub asset record just as you did on the primary asset records.

**Asset ID**
Type in a meaningful asset identification. If you have several identical assets, develop a naming convention and apply it consistently. You may use letters, numbers, or a combination. The maximum length of the asset id is 16 characters. **Each Asset ID must be unique.**

**Master Asset**
This should be populated with the primary Asset ID that was selected on the Asset List tab. To change the Master Asset, click the drop-down arrow to select the primary asset that this sub asset is to be associated with.
Continue to complete the sub asset record in the same way that you created primary asset records. Once the sub asset record is complete, you may create schedules for it using the Schedules tab. See the “Schedules” section of this chapter for more information.
Tires

The Assets Module of ManagerPlus Pro allows you to track tire information separately for all your vehicle assets. You define tire records in a similar way that you define Sub Assets. You may create maintenance schedules for the tires, and the program will notify you when they are due, just as it does with primary asset schedules.

To create a tire record, click the Assets icon on the tool bar or click Modules | Assets from the main program menu. The Assets window appears with the List tab open by default. Highlight the asset that you want to add a tire record to, then click the Tires tab. Initially, the Tires tab will be empty.

To add a tire, click the [Add] button. The Asset Detail tab opens. You will add detailed information to the tire record just as you did on the primary asset records.

**Asset ID**
Type in a meaningful asset identification. If you have several tires, develop a naming convention and apply it consistently. You may use letters, numbers, or a combination. The maximum length of the asset id is 16 characters. **Each Asset ID must be unique.**

**Master Asset**
This should be populated with the primary Asset ID that was selected on the Asset List tab. To change the Master Asset, click the drop-down arrow to select the primary asset that this sub asset is to be associated with.

**Asset Type**
This should be populated by default with TIRE when creating a tire asset. A tire asset is similar to a Sub Asset with the exception that tire asset has the Asset Type assigned to TIRE.
Asset Reports

You can generate and print several reports about your assets. To access Asset Reports, from the main ManagerPlus Pro menu, click the Asset Reports icon on the tool bar, or click Reports | Assets. See Figure 6-15. If you are already in the Assets Module, you can access Asset Reports by clicking on the [PRINT] button near the top left corner of the window.

![ManagerPlus Pro 2007 - User ID: ALD](image)

**Figure 6-15**

The Asset Reports window opens. See Figure 6-16.
Reports

There are five Asset Reports that you can view or print. To select a report, click the report icon. The five Asset Reports available are:

1. Asset Profiles
   This report prints the complete profile of each asset in a detail format. All of the information stored in the Assets Module for the records you specify, including schedules, will be printed.

2. Asset Summaries
   This report prints information about each asset in a summary format.
3. Equipment Value
This report prints each asset in a summary format with the purchase date, price, and depreciation included. This report is intended for accountants or insurance agents. It is useful for calculating depreciation or determining insurance values.

4. Equipment Cost History
This report prints a summary of fuel, oil, parts, and labor costs for your assets. The summary is figured for the life of the asset, which reflects the total costs of operating and servicing the asset.

5. Next Service
This report allows you to view upcoming service schedules, so you can plan and staff accordingly. Next Service and Units Left fields help you determine when a work order will be generated if you run the Create Scheduled Work Orders routine from the Work Order menu (See Chapter 8). You may adjust the value in the Percent Due field that appears when you select this report. Only those assets with a Next Service percentage of the value in this field will be printed. To print the Next Service Report for all assets, set the Percent Due to zero. You can also use the date range fields to print this report for a specified date range.

Search Criteria
Search Criteria for a report may be added before printing a report. For help with adding search criteria, please reference Figure 6-2 earlier in the chapter.

Sort By
Select the appropriate field from the Sort By drop down list to sort the report records. Each report may have different Sort By options.

Paper & Orientation
Some reports can be printed in a Portrait or Landscape format and on an 8 1/2 X 11 or on an 8 1/2 X 14 sheet of paper.

Send To
You may select from several options to print a report. When you have made your selection, click the [Print] icon.
Chapter 7
Purchase Orders

This chapter includes the following sections:

• Introduction
• Vendors
• Creating Purchase Orders
• Receiving
• Historical Purchase Orders
• Purchase Order Reports
Introduction

The Purchase Order Module is a powerful part of ManagerPlus Pro. It automatically creates Suggested Purchase Orders when the supply of any part in the inventory falls below a preset minimum amount. You may also create purchase orders manually. When a purchase order is filled and parts are received, the system automatically updates totals for the parts in Inventory.

To access the Purchase Orders Module, click the Purchase Orders icon on the tool bar or click Modules | Purchase Orders from the main program menu. See Figure 7-1.

Purchase Orders Tips

Several features of the Purchase Orders window makes printing, viewing, searching, and sorting easier.

Print

From any tab on the Purchase Orders window, you can quickly access Purchase Orders Reports by clicking on the [Print] button. There are
options to *Print, Print Selected, and Export List*. *Print* will open the Purchase Orders Reports window with no report search criteria set, while the *Print Selected* option will automatically set the report search criteria to the currently selected purchase order records. To select multiple purchase order records, hold the Ctrl key down and click each record. *Export List* has options to create a Microsoft Excel, HTML, CSV, or XML file with the data from the List tab.

**Search Criteria**

You may want to limit the number of purchase order records that appear on the List tabs of this module. Setting Search Criteria is an easy way to sort and display only the records you want. See Figure 7-2.

![Figure 7-2](image-url)
**Example:** An organization may have many Active Purchase Orders for several different vendors, and you are interested in viewing only Purchase Orders that are for vendor SMITH PARTS.

**Note:** The vendor SMITH PARTS is used for example purposes. Your vendors will be based on your data.

**Procedure: Search Criteria in Purchase Orders Module**

1. By default, a search criteria line will appear in the Purchase Orders Criteria window. Select the search criteria line.

2. Click the pencil and paper icon to allow editing of the search criteria line. You may also double-click the line.

3. The first drop-down list contains fields that can be used in the search criteria. Select Vendor ID from the list.

4. The label between the drop-down lists allows you to specify an operator. Clicking on the label allows you to change the operator. Verify is equal to is selected.

5. The second drop-down list contains the data that is available for the field selected in the first drop-down list. Select SMITH PARTS from the list.

6. Click the OK button. The Purchase Orders List will now display purchase orders for the vendor SMITH PARTS.

**Note:** This feature works the same way in Purchase Orders Reports.

**Favorites**

You can save Search Criteria to a Favorites list so it can be reused at a later time. After setting your Search Criteria, click the *Save to Favorites* icon and type a name for your favorite. Click [Save] and your new Favorite will appear in your Favorites list.

**Selection**

The Selection drop-down list located at the top of the List tab allows you to quickly change the criteria for data in the grid. The Selection list will contain some program default selections as well as any custom criteria that was saved using the Favorites feature of the Search Criteria window.
Grid Options

Common to most grids in ManagerPlus Pro are several features that allow you to quickly search, sort and customize data grids.

Sorting
To quickly sort data in grid, click the column title. A faded arrow pointing up will appear next to the column title indicating the data is being sorted in ascending order. To sort the data in descending order, click the column title a second time and a faded arrow pointing down will appear next to the column title.

Quick Search
Quick Search finds data based on the currently sorted column. With any record selected in the grid, begin typing the first few characters of the value you are attempting to find. The Quick Search feature will automatically move you to the first record matching the characters that you typed.

Configuring
Grid column sizes can be changed by holding your mouse down between the column titles and moving the border. Grid column order may be changed by holding your mouse down on a column title and moving it to the desired location. To add or remove columns in a grid, click the small button located in the upper left hand corner of the grid.

Grouping
To enable grouping of data by specific columns in the grid, right-click in the grid and select Show Grouping. If this feature is enabled, a section above the grid will appear allowing you drag and drop column headers for grouping grid data.
Drop-Down Lists

Many drop-down lists can be modified directly from the module. To add, edit or delete drop-down list values, move your mouse over the field and double-click. An edit window will appear that will allow you to modify the list. When double-clicking, verify the list is not dropped down.
On the Vendors tab you can create and maintain a list of the companies and entities from whom you purchase parts and assets. For the system to create and complete purchase orders, vendor information must be included.

To access Vendors, click the Vendor tab in the Purchase Orders Module. The Vendor tab appears with the List sub-tab open by default. See Figure 7-3.

<table>
<thead>
<tr>
<th>Vendor ID</th>
<th>Company Name</th>
<th>Contact Name</th>
<th>Phone</th>
<th>Status</th>
<th>Budget ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALEXANDERS</td>
<td>Alexander Parts</td>
<td>Jimmy</td>
<td>600-337-5545</td>
<td>Active</td>
<td>DEPARTMENT A-15</td>
</tr>
<tr>
<td>JOHNSON BELTS</td>
<td>Johnson Belts</td>
<td>George Lovan</td>
<td>800-555-6655</td>
<td>Active</td>
<td>DEPARTMENT C-12</td>
</tr>
<tr>
<td>PARTS WHOLESALE</td>
<td>Parts Wholesale</td>
<td>Becky Hansen</td>
<td>557-855-6623</td>
<td>Active</td>
<td>OPERATIONS</td>
</tr>
<tr>
<td>SCOTT WHOLESALE</td>
<td>Scott Wholesale Parts</td>
<td>John</td>
<td>555-555-7235</td>
<td>Active</td>
<td>PURCHASING</td>
</tr>
<tr>
<td>SJC WATER</td>
<td>SJC Water Department</td>
<td>Tim</td>
<td>712-095-0078</td>
<td>Active</td>
<td>PURCHASING</td>
</tr>
<tr>
<td>SMITH PARTS</td>
<td>Smith's Part at Wholesale</td>
<td>Bob Jones</td>
<td>800-555-5555</td>
<td>Active</td>
<td>PURCHASING</td>
</tr>
</tbody>
</table>
List

The List tab displays all your vendors in a grid view. By default the Vendors List is sorted by the last sort used. Use the scroll bar on the right side of the window to navigate through the list.

To select a record, highlight it by clicking anywhere in its row. No data fields can be populated or changed from the List tab. To go to the records where changes can be made, click the Detail tab after highlighting a vendor record, or double-click its row.

Detail

The Detail sub-tab shows specifics for a particular vendor record. See Figure 7-4.
Figure 7-4

**Vendor ID**
Type in a unique identification for each vendor. It may contain letters, numbers, or a combination both, and may be up to 16 characters long. The Vendor ID should be something meaningful to you since the Vendor List will be sorted by this ID by default. Once you have saved a new vendor record, this field becomes read-only.

**Company Name**
Type in the full or official name of the vendor. It may contain letters, numbers, or a combination of both, and may be up to 32 characters long.

**Contact Name**
Type in the name of the person you place orders through, if applicable.
Address, City, State, ZIP
Type in the street address, city, state, and zip coder for the vendor.

Email
Enter your contact’s email address, if applicable.

Website
Enter the vendor’s website address, if applicable.

Phone
Enter the primary telephone number for the vendor.

Phone 2
Enter a secondary phone number for the vendor.

Cell
Enter a cell phone number, if applicable.

FAX
Enter the vendor’s fax number.

Budget ID
Click the drop-down arrow to select the Budget ID that will be primarily used when purchases are made from this vendor. This field must be populated, though you can change the Budget ID once the purchase order has been generated. If you are not using the Budgets Module, select the default PURCHASING.

Status
Enter the status of the vendor. Examples include Active or Inactive.

Type
Enter a description for the type of vendor. For example, this field could be used to enter the payment terms the vendor provides.

Notes
This field is a free form text field. You may type in any additional information about the vendor that does not fit in the other fields.

When you are finished entering your vendors, click the Suggested tab to begin using the Purchase Orders Module.
Creating Purchase Orders

When you click the Purchase Orders icon on the tool bar or click Modules | Purchase Orders from the main program menu, the Purchase Orders window appears.

The Purchase Orders window has five tabs: Suggested, Active, Receiving, Historical, and Vendors. Each of the five tabs has two sub-tabs beneath it: List and Detail. The Purchase Order window opens to the Suggested List sub-tab. See Figure 7-5.
Suggested

Suggested Purchase Orders are a recommendation of what parts to order. Suggested PO’s are not considered purchase orders until they are activated. If use the option to automatically create suggested purchase orders, most of the data fields will be populated automatically. You always have the choice of not accepting a Suggested PO once it has been generated.

You decide when and how often Suggested POs are generated. When the quantity of a part falls below the minimum stocking level you set in Inventory, the part becomes eligible for a Suggested PO.

List

The List sub-tab displays all suggested purchase orders in a grid. By default the POs are sorted by Purchase Order ID.

To generate Suggested Purchase Orders, click the [Create Suggested PO’s] button. The system looks at all parts in Inventory and compares the number in the Available field to the number in the Minimum Stocking Level field. If the Available number is less than the Minimum number, a Suggested PO will be created for the part. The quantity on for the part on the Suggested PO will be the Normal Stocking Level for the part minus the Available number. Suggested PO are created by vendor. See Figure 7-6.
Creating Purchase Orders

To select a record, highlight it by clicking anywhere in its row. No data fields can be populated or changed from the List sub-tab. To go to the window where changes can be made, highlight one of the purchase order records then click the Detail sub-tab, or double-click the row.

**Detail**

The Detail sub-tab contains all the information about a Suggested Purchase Order. If you chose to define any of the four User Defined Fields for Purchase Orders, they appear in the middle of the tab. See Figure 7-7.
Figure 7-7

You may change the data in any field except Purchase Order Number and Date Suggested. Click [Save] after making any changes.

**Type**

Click the drop-down arrow to change the Type of purchase order. Only two choices are available: Inventory and Non-Inventory. Anything ordered or received on a Non-Inventory Purchase Order Type will not affect Inventory’s Quantity Ordered, Quantity Received or Available fields. Creating a Non-Inventory PO is useful if you have to replace lost, stolen, or destroyed times. A Non-Inventory PO may also include items that are not in the Inventory List.

**Vendor**

Click the drop-down arrow and select a vendor for this purchase order from the list you created on the Vendors tab.
**Budget ID**
Click the drop-down arrow to select the Budget ID to assign the purchase order to. If you are not using the Budgets Module, select the default budget you created when you configured ManagerPlus Pro.

**User Defined Fields**
If you defined any of the user defined fields for the Purchase Orders module during setup, those fields will also appear on the Purchase Order Details windows.

**Purchase Order Parts List**
On the Parts List, you may add, remove or modify parts on the suggested purchase order. Click the [Save] button after making changes.

Once you are finished editing all the Suggested Purchase Orders, you can view all of them by clicking on the List sub-tab.
Activate Suggested Purchase Orders

From the List sub-tab, you can view all of the Suggested Purchase Orders. You may choose to activate selected or all suggested purchase orders.

- **Activate Selected Suggested POs**
  - If you want to activate some but not all of the Suggested Purchase Orders, hold down the <CTRL> (Control) key and click each Suggested PO you want activated. When you have all of the appropriate POs highlighted, click the [Activate Selected Suggested POs] button.

- **Activate All Suggested POs**
  - If you want to activate all of the Suggested Purchase Orders, click the [Activate All Suggested POs] button.

When you activate a Suggested Purchase Order, the record is transferred to the Active Purchase Order List on the Active tab and the Received Purchase Order List on the Receiving tab. Any Suggested POs that have not been activated will remain on the Suggested List tab. If the Vendor field has not been populated, the PO cannot be activated.

Active

The Active tab allows you to make modifications to existing purchase orders. Any purchase order that appears on the Active tab also appears on the Receiving tab.

List

The List sub-tab displays all the active purchase orders in a grid. By default, the POs are sorted by Purchase Order ID. Use the scroll bar on the right side of the window to navigate through the list. See Figure 7-8.
To select a record, highlight it by clicking anywhere in its row. No data fields can be populated or changed from the List sub-tab. To go to the window where changes can be made, highlight a record and click the Details sub-tab, or double-click the row.

**Details**

The Details sub-tab contains all the particulars of an Active Purchase Order. If you chose to define any of the four User Defined Fields for Purchase Orders, they appear in the middle of the tab. See Figure 7-9.
Any field on the Details sub-tab can be edited except for those that are shaded light blue. After you have made any desired changes to an active purchase order record, click the [Save] button.

Figure 7-9
Creating Purchase Orders

A manual purchase order is required if you do the following:

- Do not set stocking levels for parts in the Inventory module.
- Place an order for a part from a vendor apart from the usual order
- Place an order for items with special pricing, or
- Foresee a one-time requirement for more of something than you have.

Preferred Method

The preferred method of generating a manual PO is to add the parts you want into Inventory with the Beginning quantity set at zero, and the Normal quantity set at the number you want to keep on hand. Set the Minimum quantity at a number more than zero. If the Minimum is set at zero, the system will ignore the record and never generate a Suggested Purchase Order.

After creating the part in Inventory, generate a Suggested Purchase Order in the manner described previously. The system will see the new part with a quantity of zero and create a PO to bring the quantity up to the Normal level you entered in Inventory. Once you have generated the Suggested PO, you may change the order quantity to any number you want. Then activate the PO.

Alternate Method

Another method of creating a manual PO is to complete all of the fields by hand. However, you must have the part, part type, vendor, and budget assignment already in your system. The following procedure explains the steps that are required.

Procedure: Manually Creating an Active Purchase Order
1. From the Purchase Orders window, click the Active | Detail tab.
2. Click [ADD]. The Purchase Order # will be automatically populated by the system.
3. Click the drop-down arrow in the Type field and select the appropriate type of PO. The system default is Inventory.
4. Click the drop-down arrow in the Vendor field and select the appropriate vendor.
5. Click the drop-down arrow in the Budget ID field and select the appropriate budget.
6. Type the appropriate data into the User Defined fields, if necessary.
7. In the Parts List section, click the Part ID field and select the part(s) to be ordered. The system populates the Description and Unit Cost fields automatically.
8. Click in the Qty Ordered field and type in the quantity of the part to be ordered.
9. Modify the unit cost, if necessary.
10. Click the [SAVE] button.
11. Click the List tab. The new Active Purchase Order should be in the list.
Receiving

When your POs come back fulfilled, you need to record the items in your inventory. When you activate a PO, the system copies the details of it to both the Active and Receiving tabs. The sub-tabs on the Receiving tab are similar to those on the Suggested and Active tabs.

To access Receiving, click the Receiving tab of the Purchase Orders window. The Receiving tab appears with the List sub-tab open by default. See Figure 7-10.
List

The List sub-tab displays your active purchase orders. Use the scroll bar on the right to move through the records. To see more details of a record, highlight it by clicking anywhere in its row, then click the Details sub-tab or double-click a row.

Details

The Details sub-tab contains all of the data for a particular purchase order. If you chose to define any of the four User Defined Fields for Purchase Orders, they appear in the middle of the sub-tab. See Figure 7-11.

![Figure 7-11](image-url)
Fields appearing in blue are not editable and were pre-populated by the system or data was entered in the Active | Detail sub-tab.

**Invoice Date**
Enter the date of the invoice. The date should appear on the invoice you received with the parts from the vendor.

**Invoice #**
Type in the number of the invoice. The number should appear on the invoice you received with the parts from the vendor.

**Receive All Quantities**
If the vendor filled the entire purchase order, you can click the [Receive All Quantities] button to automatically receive the number that you ordered. Otherwise, you can enter the quantity received for each part.

**Unit Cost**
You may change the information in the Unit Cost field, which appears in the table at the bottom of the window. If the vendor charged you a different price for the parts than the price on the system-generated purchase order, change the number in this field to reflect the actual price.

**QtyRecv’d**
Type in the quantity of the part that you actually received.

**Post Receivings**
Clicking the Post Receiving button will update your inventory with the received quantities for each part. If all quantities have been received, the purchase order will be moved to the Historical tab.

**Note:** If the quantity received is less than the quantity ordered, the system will display a warning asking if you would like to keep the remaining quantity on order. If the quantity received is more than quantity ordered, the system will display a warning asking if the received quantity is correct.

**Procedure: Receiving Parts on a Purchase Order**
1. From the Receiving | List sub-tab, click the purchase order you want to receive.
2. Click the Details sub-tab.
3. Type the quantity of each part you received into the Qty Recv’d field in the Parts List or click the Receive All Quantities button.

4. Type the invoice date into the Invoice Date field.

5. Type the invoice number into the Invoice # field.

6. Click [Save] on the upper tool bar.

7. Click the [Post Receivings] button.

After posting the completed purchase order, the system removes it from Receiving and Active tabs and places it in the Historical tab. Once the PO is in the Historical tab, no fields can be changed.
Historical Purchase Orders

The Historical tab allows you to view previously completed purchase orders. Each field in the Historical tab is shaded, indicating that no data in any of the fields can be changed.

To access historical purchase orders, click the Historical tab in the Purchase Orders window. The Historical tab appears with the List sub-tab open by default.

List

The List sub-tab displays the historical purchase orders in a grid. See Figure 7-12.
Use the scroll bar on the right to move through the records. To view details of a record, highlight it by clicking anywhere in its row and click the Details sub-tab or double-click the record.

**Figure 7-12**

The **Detail** sub-tab contains all the particulars of a completed purchase order. No data can be changed from this window. To make changes to historical POs, click the [Adjust Purchase Order] button. The program will restore the PO to the Receiving tab, where you can make adjustments. When you have completed the modifications, click the [Post Receivings] button again.
In addition to printing purchase orders themselves, you can print a number of different reports about your purchase orders. To access Purchase Order Reports, click the Purchase Orders button on the tool bar or click Reports | Purchase Orders from the main ManagerPlus Pro window. See Figure 7-13. If you are already in the Purchase Orders module, you can access Purchase Order Reports by clicking on the [PRINT] button near the top left corner of the window.

The Purchase Order Reports window opens. See Figure 7-14.
Reports

There are eight Purchase Order Reports that you can view or print. To select a report, click the report icon. The eight Purchase Order Reports available are:

1. **Suggested Purchase Orders**
   This report prints suggested purchase orders from the Purchase Orders | Suggested tab.

2. **Active Purchase Orders**
   This report prints active purchase orders from the Purchase Orders | Active tab. You can give these forms to vendors to assist them in filling your orders.
3. Historical Purchase Orders
This report prints historical purchase orders from the Purchase Orders | Historical tab.

4. Suggested Parts to Order
This report provides a list of every part that is listed on all the Suggested Purchase Orders.

5. Active Parts on Order
This report provides a list of every part that is listed on all the Active Purchase Orders.

6. Historical Parts Received
This report provides a list of every part that is listed on all Historical Purchase Orders. The report does not include vendor information.

7. Vendor
This report prints all the information the program has for your vendors.

Vendor Barcode
This report prints list of Vendors that include the Vendor’s barcode.

Search Criteria
Search Criteria for a report may be added before printing a report. For help with adding search criteria, please reference Figure 7-2 earlier in the chapter.

Sort By
Select the appropriate field from the Sort By drop down list to sort the report records. Each report may have different Sort By options.

Paper & Orientation
Reports are printed in a Portrait and on an 8 1/2 X 11 sheet of paper.

Send To
You may select from several options to print a report. When you have made your selection, click the [Print] icon.
Chapter 8
Work Orders

This chapter includes the following sections:

- Introduction
- Adding and Editing Work Orders
- Completing Work Orders
- Requests
- Work Order Reports
Introduction

The Work Orders Module allows you to create both Scheduled and Non-Scheduled Work Orders. An example of a Scheduled Work Order is when you need to change the oil in an engine every 4,000 miles; a Non-Scheduled Work Order includes repairs, failures unexpected maintenance, etc.

You can choose to automatically generate work orders for all asset schedules that are due or overdue, or you can manually create work orders.

To access Work Orders, click the Work Orders button on the toolbar or click Modules | Work Orders from the main ManagerPlus Pro menu. See Figure 8-1.

Work Orders Tips

Several features of the Work Orders window makes printing, viewing, searching, and sorting easier.
Print

From any tab on the Work Orders window, you can quickly access Work Orders Reports by clicking on the [Print] button. There are options to Print, Print Selected, and Export List. Print will open the Work Orders Reports window with no report search criteria set, while the Print Selected option will automatically set the report search criteria to the currently selected work order records. To select multiple work order records, hold the Ctrl key down and click each record. Export List has options to create a Microsoft Excel, HTML, CSV, or XML file with the data from the List tab.

Search Criteria

You may want to limit the number of work order records that appear on the List tabs of this module. Setting Search Criteria is an easy way to sort and display only the records you want. See Figure 8-2.
Example: You would like to see a list of active work orders that are past due and high priority.

Procedure: Search Criteria in Work Orders Module
1. By default, a search criteria line will appear in the Work Orders Criteria window. Select the search criteria line.
2. Click the pencil and paper icon to allow editing of the search criteria line. You may also double-click the line.
3. The first drop-down list contains fields that can be used in the search criteria. Select Status from the list.
4. The label between the drop-down lists allows you to specify an operator. Clicking on the label allows you to change the operator. Verify is equal to is selected.
5. The second drop-down list contains the data that is available for the field selected in the first drop-down list. Select ACTIVE from the list.
6. Click the plus icon in the upper right hand corner to add a new criteria line.
7. Click the pencil and paper icon to allow editing of the search criteria line. You may also double-click the line.
8. Select the Due Date field from the first drop-down list in the line.
9. Click the label between drop-down list and select is less than.
10. Select today’s date from the drop-down calendar.
11. Click the plus icon in the upper right hand corner to add a new criteria line.
12. Click the pencil and paper icon to allow editing of the search criteria line. You may also double-click the line.
13. Select the Priority field from the first drop-down list in the line.
14. Verify is equal to is selected between the drop-down lists.
15. Select HIGH from the second drop-down list in the line.
16. Click the OK button. The Work Orders List will now display active work orders that are past due and marked high priority.

Note: This feature works the same way in Work Orders Reports.
**Favorites**

You can save Search Criteria to a Favorites list so it can be reused at a later time. After setting your Search Criteria, click the *Save to Favorites* icon and type a name for your favorite. Click [Save] and your new Favorite will appear in your Favorites list.

**Selection**

The Selection drop-down list located at the top of the List tab allows you to quickly change the criteria for data in the grid. The Selection list will contain some program default selections as well as any custom criteria that was saved using the Favorites feature of the Search Criteria window.

**Grid Options**

Common to most grids in ManagerPlus Pro are several features that allow you to quickly search, sort and customize data grids.

**Sorting**

To quickly sort data in grid, click the column title. A faded arrow pointing up will appear next to the column title indicating the data is being sorted in ascending order. To sort the data in descending order, click the column title a second time and a faded arrow pointing down will appear next to the column title.

**Quick Search**

Quick Search finds data based on the currently sorted column. With any record selected in the grid, begin typing the first few characters of the value you are attempting to find. The Quick Search feature will automatically move you to the first record matching the characters that you typed.

**Configuring**

Grid column sizes can be changed by holding your mouse down between the column titles and moving the border. Grid column order may be changed by holding your mouse down on a column title and moving it to the desired location. To add or remove columns in a grid, click the small button located in the upper left hand corner of the grid.
Grouping
To enable grouping of data by specific columns in the grid, right-click in the grid and select *Show Grouping*. If this feature is enabled, a section above the grid will appear allowing you drag and drop column headers for grouping grid data.

Drop-Down Lists
Many drop-down lists can be modified directly from the module. To add, edit or delete drop-down list values, move your mouse over the field and double-click. An edit window will appear that will allow you to modify the list. When double-clicking, verify the list is not dropped down.
Adding and Editing Work Orders

When you click the Work Orders icon on the tool bar or click Modules | Work Orders from the main program menu, the Work Orders window appears with the List tab open by default. See Figure 8-3.

**Figure 8-3**

List

The List tab displays your work orders in a grid. To select a record, highlight it by clicking anywhere in its row. Use the scroll bar on the
right to move through the records. No data fields can be populated or changed from the List tab. To go to the detail record where changes can be made, highlight the work order and click the Detail tab, or double-click the record.

**Detail**

The Detail tab shows all of the information about the work order. Several of the fields include lookup windows that were defined in Setup. The tab has several sub-tabs. The Work sub-tab is open by default. See Figure 8-4.

**Note:** Many of the fields at the top of the tab are shaded, which means they cannot be changed from this window. The system collects data for these fields from the asset profile in Assets. Any changes you wish to make to the data in the shaded fields must be made in the Assets Module.
When you select an existing work order, only certain fields are available for editing. These fields appear white. When you create a new work order, you can assign the Asset ID.

When you select an Asset ID in this manner, the system automatically populates some of the fields in the Detail tab. Creating work orders for your maintenance schedules is done on the Schedules tab.

The following definitions are a brief description of the fields on the Detail tab, including an explanation of where the system receives the data.
Work Order #
When you generate work orders automatically, the work order number is assigned by the system. When you click [Add] to create a new work order, the system automatically assigns the next work order number available. This field cannot be changed.

Code
The Code field can be used for a short description of work to be performed. This field is optional and is used frequently in reporting. You may type a value in the Code field or select a value from the list.

Purpose
The Purpose field is optional. It is frequently used for work order that are not related to an asset in the system such as a task or project.

Asset ID
When you generate work orders automatically, this field is populated by the system. When you create a work order manually, click the drop-down arrow to select the asset that is to be the subject of the work. The lookup list comes from the Assets Module.

Budget ID
The Budget ID is required and by default will have the Budget ID that is assigned to the asset selected on the work order. The value may be changed if needed.

Schedule
This field is read-only and is populated by the system when a scheduled work order is created or a work order has been created from a request.

Model, Serial #, Description
Fields in this section are populated automatically from the asset selected on the work order. By default, Model, Serial #, and Description are displayed. Right-clicking on any of these fields provides a list of other fields that can be displayed in place of the default fields.

Created
When a new work order is created, the system populates this field with the current date.
**Completed**
You may select the date the work order was completed. If you do not select a date for the Completed field, it will be automatically populated with the current date when the [Complete Work Order] button is clicked.

**Due**
You may specify a due date for the work order. This is an optional field.

**Status**
This is a system field that indicates whether a work order is active, completed or locked.

**Assigned To**
Use the drop down arrow to select the employee that is assigned to the work order. This is an optional field.

**Priority**
Use the drop down arrow to assign a priority to the work order.

**Down Hours**
Enter the down time of the asset in hours.

**Update Meters**
In the Update Meters fields, you may update an asset’s current meters while the work order is active. The current totals for each meter appears in a label on the right side of each meter. When you enter new values into the fields and click the [Post Meters] button, the current totals are updated. If you enter a value in for a meter and do not click the [Post Meters] button, the value will automatically be posted when you complete the work order.

The Detail tab includes several sub-tabs. The Work sub-tab is open by default.

**Work**
The Work sub-tab provides detailed steps of the work that is to be performed and notes related to the work order. You may add, edit, or delete the work steps. The Work tab will be automatically populated for work orders that were created from a schedule. See steps on creating sched-
ules in the Assets chapter. You may add steps using the [Description of Work] button. The Description of Work lookup list contains predefined steps that occur frequently and provides a quick and consistent method for adding work steps. After clicking the [Description of Work] button, hold down the <Ctrl> key and use the mouse to select items. When you have all of the desired items highlighted, click the [Select Current Item(s)] button in the upper left hand corner. The system copies the steps to the work order.

Parts

On the Parts sub-tab, you may add, edit, or delete parts for the work order. Any part you change on a work order will update the Allocated and Available fields of that part’s record in Inventory when you [Save] the change in the work order. The Parts tab will be automatically populated for work orders that were created from a schedule. See steps on creating schedules in the Assets chapter.

Alternate Parts

If a part you need for the work order is out of stock, click the [Alternate Parts] button to select an alternate part if you designated any during inventory setup. The Parts Lookup dialog opens with all designated alternate parts listed. Select the alternate part you want to use to complete this work order and click [OK]. The part is added to the work order.

Non Stock Parts

If a part does not exist in your inventory, but you want to add it to the work order, click the [Non Stock Parts] button. The non stock part entry window allows you to free type the part information. After completing the information, press the [Enter] key or press [Esc] to cancel. Non stock parts will appear in the parts list with the Part ID field shaded in gray.

List Parts for Asset

If List Parts for Asset is checked, only parts that were assigned to the asset in the Asset module will appear in the drop-down list of parts. Unchecking this option will show all parts from your inventory in the drop-down list for parts. See the Assets chapter for details on adding parts to an asset.
**Labor**

On the Labor sub-tab you can add the employee or employees who have or will perform the work associated with this work order. Click the drop-down arrow in the Employee field to select an employee from the list you created in Setup (under Admin | Lookup Tables | Employees).

**User Defined**

On the User Defined sub-tab you may add, edit, or delete data from the User Defined fields. This tab will be blank if no user defined fields were defined in Setup for the Work Orders Module.

**Attachments**

This sub-tab contain file attachments related to the work order. Attachments may include pictures, spreadsheets, drawing or any file related to the work order. The Attachments tab will be automatically populated for work orders that were created from a schedule. See steps on creating schedules in the Assets chapter.

**Asset Info**

The Asset Info sub-tab contain additional details about the Asset. Information in this sub-tab is read-only and can only be modified from the Asset module’s Detail tab.

**Scheduling**

The Scheduling tab contains a comprehensive list of all schedules for all assets in the system. This list is used to generate work orders form schedules that are due. See Figure 8-5.
When you click this button, the program examines all asset schedules and determines which are due for maintenance. The program will automatically create a work order and add it to the List tab for due schedules.

**Generate from Selected Schedules**

Use this button to create work orders only for the asset schedules that
you select from the list. Click the first schedule that you want to generate work orders from. To select additional schedules, hold down the <Ctrl> (Control) key on the keyboard and click each schedule. To deselect a schedule, hold down the <Ctrl> key and click the highlighted record again. When you have made your selections, click the [Generate from Selected Schedules] button. The program generates work orders for the selected scheduled and places them on the List tab.

**Schedules due at ___ percent**

This field lies between the [Generate from All Schedules Due] and the [Generate from Selected Schedules] buttons. It allows you to decide when schedules will be considered due. By default, the field is set at 100 percent. Use the arrow buttons to change the percentage, if you desire.

**Note:** This field only applies when you use the [Generate from All Schedules Due] button. If you use the [Generate from Selected Schedules] button, the program will generate those schedules regardless of what the percentage due is set at.

**Only Show Due Schedules**

Check this box to display only schedules that are currently due. Due schedules is determined by the *Scheduled due at ___ percent* value that was described in the above section.

**Retrieve Superseded**

If you are using the superseding feature on any schedules, check this box to show all schedules that are due and being superseded. Uncheck this box will only show the schedule that is due for the least frequent cycle.

**Creating Work Orders**

There are three ways to create a work order. First, you can click the [Generate from all Schedules Due] button and allow the system to create work orders automatically from all due schedules. Second, you can click [Generate from Selected Schedules] and decide which schedules you want executed. And third, you can click the [Add] button from the Work Orders | Detail tab and manually create a work order. A manual work
order is needed to handle an unplanned or emergency maintenance task such as break downs, repairs, or any unexpected maintenance.

**Procedure: Generating Work Orders from all Schedules Due**
1. From the Scheduling tab of the Work Orders Module, set the `Schedules Due at ___ %` value at the desired percentage.
2. Click [Generate from all Schedules Due]. The system generates the work orders and automatically switches to the List tab where all active work orders are displayed.
3. You can view the details of each work order by clicking on the Detail tab.

**Procedure: Generating Work Orders from Selected Schedules**
1. From the Scheduling tab of the Work Orders Module, hold down the `<Ctrl>` (Control) key on the keyboard and click all the schedules for which you want work orders generated.
2. With the desired schedules highlighted, click [Generate from Selected Schedules]. The system generates the work orders and automatically switches to the List tab where all active work orders are displayed.
3. You may view the details of each work order by clicking on the Detail tab.

**Procedure: Generating Work Orders Manually**
1. From the List or Detail tab of the Work Orders Module, click [Add].
2. In the Code field, type in a code for the work order or select a code from the drop-down list. This is an optional step.
3. Enter a value in the Purpose field is necessary. This is an optional step.
4. Click the drop-down arrow in the Asset ID field and select the asset for the work order. Selecting an asset automatically populates the remaining read-only fields on the tab. This step is optional if a value was entered in the Purpose field.
5. On the Work sub-tab, select or type in the work steps you want accomplished.
6. Click Add on the Parts sub-tab, then click the drop-down arrow to select a part for the work order. Enter the appropriate quantity for the part. Repeat this step for each part that is needed.

7. Click Add on the Labor sub-tab, then click the drop-down arrow to select an employee for the work order. Enter the labor hours for the employee. Repeat this step for each employee associated to this work order.

8. Fill in any necessary fields on the User Defined sub-tab.

9. Add file attachments on the Attachments tab if necessary.

10. Click [Save] to save the work order.

11. When you are ready to print the work orders, click the [Print] icon and select Print. The Work Order Reports window opens with the Active Work Order Forms Report selected by default.

12. Select print options then click the Printer icon.

**Note:** To print several work orders at the same time, hold the Ctrl key down and click the desired work orders in the List tab. Click the Print icon and choose the option *Print Selected* or if you want file attachments included, select *Print Selected with Attachments*. The system will automatically set the search criteria in the reports module to the selected work orders.
Completing Work Orders

No matter how you generated a work order, changing its status to Completed is the same for all three methods.

Procedure: Completing a Work Order
1. From the List tab in the Work Orders module, highlight the work order that you want to complete.
2. Click the Detail tab or double click the work order record.
3. Review the data under the Work, Parts, Labor, and User Defined sub-tabs and make any appropriate changes.
4. If necessary, adjust or enter meter values in the Update Meters box.
5. Click [Save] if the button is highlighted. (Optional.)
6. Click the [Complete Work Order] button. The system moves the work order from “Active” to “Completed.”

Note: Be sure that all of the fields are populated correctly. For example, if you want a date other than the current date for Date Completed, make sure you enter that date in the Date Completed field. Once you click [Complete Work Order], you cannot change any of the data for that work order unless you unpost the work order.

Unposting Completed Work Orders

Occasionally, you may need to make changes to a work order that has already been completed. You can modify some of the details of a work order by unposting it.

Procedure: Unposting a Completed Work Order
1. From the Work Orders | List tab, highlight the desired work order.
2. Click the Detail tab. All of the fields are shaded.
3. Click the [Unpost Work Order] button.
4. The work order is returned to the Active Work Orders list and some of the fields are now editable. Only data in the unshaded fields can be changed.

5. Once you have made the desired changes, click the [Complete Work Order] button to repost the work order.
Requests

The Requests tab contains a list of all requests for work that have been submitted to ManagerPlus. Requests can be added manually, but most will be automatically received through the Easylinks request module or through the external Request module. Requests can be added, completed, or converted to a work order from this tab. The Request tab has several features to help you process requests quickly. See Figure 8-6.

Note: Easylinks and the external Request module are both separate applications that provide a quick method for anyone to submit a request for work.
You may add new requests by clicking the [Add] button. A new request record will be added to the grid where you can enter or select the appropriate information. If you are using Easylinks or the external Request module, requests will automatically appear in the Request tab when a person submits a new request. You may modify or delete requests that have not been completed or did not have a work order created for them.
Create Work Order
The [Create Work Order] button provides a quick way to create a work order in the Work Order List tab for a request. When creating a work order for a request, you may specify a status code for the request, who the work order will be assigned to, a work order code, a priority, and a due date. See Figure 8-7.

![Create Work Order](image)

Figure 8-7

Complete Request
The [Complete Request] button provides the option of closing a request without creating a work order. Clicking the [Complete Request] button will display a window where you may select a Status Code for the request. Click the [OK] button to complete the request and assign the selected Status Code to the request.

Re-open Request
Clicking the [Re-Open Request] button on a completed request will re-open the request and allow you to make changes to the request.
You can generate and print several work order reports. To access Work Order Reports, from the main ManagerPlus Pro menu click the Work Order Reports icon on the tool bar, or click Reports | Work Orders. See Figure 8-6. If you are already in the Work Orders module, you can access Work Order Reports by clicking on the print icon near the top left corner of the window.

Figure 8-8

The Work Order Reports window appears. See Figure 7-8.
There are several Work Order Reports that you can view or print. To select a report, click the report icon. Your report choices are the following:

1. **Active Work Orders**
   This report prints active work orders. An active work order either has been generated and scheduled, or the work is in progress. The form can include several blank lines, so the operator or mechanic can write additional information on the work order.

2. **Completed Work Orders**
   This report prints work orders that have been completed.
3. Active Work Order Summaries
This report prints a summary of all active work orders. The summary includes the most important data from the work order and presents it in a columnar format.

4. Completed Work Order Summaries
This report prints a summary of all completed work orders. The summary includes the most important data from the work order and presents it in a columnar format. The Landscape Orientation has Standard View and Optional View Report Formats that provide slightly different fields on the report.

5. Work Order Variance Report
This report prints a summary of estimated versus actual costs, hours, and parts used on your work orders.

6. Repair History
This report prints a repair history for an asset. By clicking on a check-box that appears when the report is selected, you can choose whether or not to print subtotals for each employee listed on the report.

7. Down Time
This report summarizes the number of days an asset is out of operation while maintenance is carried out.

8. Parts Usage Report
This report prints a summary of the parts used on your work orders.

9. Labor Report
This report summarizes the hours worked and labor cost for each employee, broken down by individual work orders. The Labor Report also has a Labor Date Field.

10. Requests
The Requests Report is used in conjunction with ManagerPlus Pro’s Work Order Request utility. It displays request information in a summarized view, with each page containing many requests. You must have either active or completed requests for anything to display in the report.
Search Criteria
Search Criteria for a report may be added before printing a report. For help with adding search criteria, please reference Figure 8-2 earlier in the chapter.

Sort By
Select the appropriate field from the Sort By drop down list to sort the report records. Each report may have different Sort By options.

Paper & Orientation
Reports are printed in a Portrait and on an 8 1/2 X 11 sheet of paper. Some report are available in a Landscape view or on an 8 1/2 X 14 sheet of paper.

Send To
You may select from several options to print a report. When you have made your selection, click the [Print] icon.
Chapter 9
Logs

This chapter includes the following sections:

• Introduction
• Log Entry
• Log History
• Receiving
• Log Reports
The Logs Module provides a quick and easy method for recording, viewing and managing meter and consumption entries for your assets. The Logs window has three tabs: Log Entry, Log History, and Receiving.

The Log Entry tab allows you to quickly record meter readings for your assets, and if applicable, the fuel and oil amounts used. The Log History tab allows you to see the detailed log entries for each asset. The Receiving tab provides an alternative to purchase orders for updating your inventory.

To access the Logs Module, click the Logs icon on the tool bar or click Modules | Logs from the main program menu. See Figure 9-1.

The Logs window appears with the Log Entry tab open by default.

Logs Tips

Several features of the Logs window makes printing, viewing, searching, and sorting easier.
**Print**

From any tab on the Logs window, you can quickly access Logs Reports by clicking on the [Print] button. There are options to Print, Print Selected, and Export List. Print will open the Logs Reports window with no report search criteria set, while the Print Selected option will automatically set the report search criteria to the currently selected log records. To select multiple purchase order records, hold the Ctrl key down and click each record. Export List has options to create a Microsoft Excel, HTML, CSV, or XML file with the data from the List tab.

**Search Criteria**

You may want to limit the number of log records that appear on the Log Entry or Log History tabs of this module. Setting Search Criteria is an easy way to sort and display only the records you want. See Figure 9-2.

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*Figure 9-2*
Example: Your organization may have many different types of assets, but you are only responsible for recording the hour meters in ManagerPlus Pro for all assets that are assigned to the PLANT 1 Asset Group.

Note: The asset group PLANT 1 is used for example purposes. Your asset groups will be based on your data.

Procedure: Search Criteria in Logs Module
1. By default, a search criteria line will appear in the Logs Criteria window. Select the search criteria line.
2. Click the pencil and paper icon to allow editing of the search criteria line. You may also double-click the line.
3. The first drop-down list contains fields that can be used in the search criteria. Select Group from the list.
4. The label between the drop-down lists allows you to specify an operator. Clicking on the label allows you to change the operator. Verify is equal to is selected.
5. The second drop-down list contains the data that is available for the field selected in the first drop-down list. Select PLANT 1 from the list.
6. Click the OK button. The Logs List will now only display assets assigned to the PLANT 1 Asset Group.

Note: This feature works the same way in Logs Reports.

Favorites
You can save Search Criteria to a Favorites list so it can be reused at a later time. After setting your Search Criteria, click the Save to Favorites icon and type a name for your favorite. Click [Save] and your new Favorite will appear in your Favorites list.

Selection
The Selection drop-down list located at the top of the List tab allows you to quickly change the criteria for data in the grid. The Selection list will contain some program default selections as well as any custom criteria that was saved using the Favorites feature of the Search Criteria window.
Grid Options

Common to most grids in ManagerPlus Pro are several features that allow you to quickly search, sort and customize data grids.

Sorting
To quickly sort data in grid, click the column title. A faded arrow pointing up will appear next to the column title indicating the data is being sorted in ascending order. To sort the data in descending order, click the column title a second time and a faded arrow pointing down will appear next to the column title.

Quick Search
Quick Search finds data based on the currently sorted column. With any record selected in the grid, begin typing the first few characters of the value you are attempting to find. The Quick Search feature will automatically move you to the first record matching the characters that you typed.

Configuring
Grid column sizes can be changed by holding your mouse down between the column titles and moving the border. Grid column order may be changed by holding your mouse down on a column title and moving it to the desired location. To add or remove columns in a grid, click the small button located in the upper left hand corner of the grid.

Grouping
To enable grouping of data by specific columns in the grid, right-click in the grid and select Show Grouping. If this feature is enabled, a section above the grid will appear allowing you drag and drop column headers for grouping grid data.
Drop-Down Lists

Many drop-down lists can be modified directly from the module. To add, edit or delete drop-down list values, move your mouse over the field and double-click. An edit window will appear that will allow you to modify the list. When double-clicking, verify the list is not dropped down.
Log Entry

Use the Log Entry tab to record the actual meter readings from your assets. This log also tracks fuel and oil used by the equipment or vehicles.

Miles entries must always be greater (incrementing meter) than the last entry. Hours and Qty entries may act similar to Miles entries where the entries must be greater than the previous entry or there is an option in Setup to have the meter readings accumulate by adding entries together. In this method, each new entry you type in is added together to reflect the asset’s total accumulation. Fuel and Oil entries are always treated as an accumulation of entries where each new entry is added to the previous total amount for the asset. To enable the Hours or Qty meters to behave as an accumulating meter or to change the default custom meter Qty, reference Logs section in Chapter 2.

When you open the Logs Module, the Log Entry tab opens by default. See Figure 9-3.
By default, only assets assigned to categories that track Miles, Hours, Fuel, Oil, Qty (custom meter), or Tires appear on the Log Entry tab. You may further limit the records displayed by including additional search criteria.

The ManagerPlus Pro program uses log entries to update when maintenance schedules are due. To ensure that your schedules are completed consistently, you should regularly collect and record log entries. ManagerPlus recommends that you make entries for each asset at least once a week. The more frequently you make these log entries, the more timely and accurate your schedules will be.

**Note:** Log entries may also be imported from fuel systems or spreadsheets. If your log data already exists in another system, you may be
able to use the optional Import module to automate the log entry process.

**Procedure: Adding Entries to the Log Entry**

1. On the Log Entry tab, click in the appropriate field (Miles, Hours, Fuel, Oil, Qty or Tire) for the asset you are updating.
2. Type in the new value.
3. Repeat Steps 1 and 2 for each appropriate field of each asset.
4. If you want to update sub asset records, as well as primary asset records, check the Update Sub Assets checkbox.
5. If you want fuel and oil amounts to be deducted from your inventory, check the Deduct Fuel/Oil from Inventory checkbox.
6. When all entries have been made, click [Post Log Entries] button. Asset records are not updated until this button is clicked.
7. Once the entries have been processed, the new totals appear in the totals fields at the bottom of the tab.
Log History

The Log History tab allows you to view all log entries for an asset as well as add entries. Entries added in the Log History tab automatically updates the asset totals for each meter entered.

The Log History tab has two sub-tabs, Asset and Detail. Asset is open by default. See Figure 9-4.

![Figure 9-4](image)

Asset

The Asset tab lists all of your Assets. Select the Show Sub Assets checkbox to show sub assets as well.
To select a record, highlight it by clicking anywhere in its row. Use the scroll bar on the right to move through the records. No data fields can be populated or changed from the List tab. To edit or view a complete record, highlight the record then click the Detail tab, or double-click the record.

**Detail**

The Detail tab contains all of the information about the individual log entries for an asset. See Figure 9-5.

**Figure 9-5**

**Asset ID, Description, Budget ID, Asset Group, Model**

These fields are read-only and they provide details about the selected asset. The grid at the bottom of the window display all log entries for the selected asset. Log entries may also be added from this window.
**Meter Change**

The Meter Change feature provides a simple method for handling meter replacements and meter roll-overs. Select the meter type to change and click the Change Meter button.

![Meter Change Window]

**Procedure: Adding an entry through Log History**

1. From the Log History | Detail tab, click [ADD]. A blank line appears in the grid.
2. The Date field defaults to the current date and time. Click in the Date field to change the value.
3. Click in any of the remaining fields to enter a value. When all values are entered, click [SAVE].
Receiving

The Receiving tab is one of two places in the ManagerPlus Pro program where you can receive parts and update your inventory totals. The other location is in the Purchase Orders Module, which handles receiving of parts that were ordered on purchase orders. You can use the Receiving Log to add parts to inventory without creating a purchase order. The Receiving log accepts negative numbers as values, so you can easily adjust your inventory quantities.

Unlike the Purchase Order Module, the Receiving log does not require information on the vendor or budget assignment for expense purposes. However, the part must already exist in Inventory before it can be received. Also, receiving parts through the Receiving log does not create a historical record of the received parts. If you will need to report or view historical information on parts received, you must use the purchase order module.

Each record in the Receiving log has five fields. When you select a Part ID, the Description and Cost fields are automatically populated. Data in the shaded fields at the bottom of the window is populated from the Inventory record of the currently selected item. See Figure 9-6. If no item is selected, the fields do not appear.
When you click in the Part ID field, a lookup button appears on the right end. Click the lookup button to call up a Lookup dialog box where you can select the part to be received.

**Description**
When you select a part ID, this field is automatically populated with the description you typed in when you added the part into the Inventory Module.

**Cost**
When you select a part ID, this field is automatically populated with the amount you entered into the Cost field when the part was added into the Inventory Module. You may change this number as needed.
**Quantity**
Type in the quantity of the part that you are receiving.

**Total**
The system automatically calculates and displays the total cost of the purchase.

**Procedure: Receiving Parts Through the Receiving log**
1. Click [ADD].
2. Click in the Part ID field and drop-down the lookup list.
3. Select a part by clicking on it.
4. The Description and Cost fields populated for the inventory module. You may adjust the cost if necessary.
5. Click in the Quantity field and type in the quantity the part that you are receiving.
6. Repeat Steps 1-5 for each part you want to receive.
7. When you have the log completed, click the [Post Receivings] button. This updates the part quantity totals in Inventory and clears the Receiving log entries.
Log Reports

You can generate and print several reports about your logs. To access Logs Reports, from the main ManagerPlus Pro menu, click the Logs Reports icon on the tool bar, or click Reports | Logs. See Figure 9-7. If you are already in the Logs module, you can access Log Reports by clicking on the [PRINT] button near the top left corner of the window.

Figure 9-7

The Log Reports window appears. See Figure 9-8.
There are several Log Reports that you can view or print. To select a report, click the report icon. Your choices are the following:

1. **Equipment Fuel/Oil per Miles/Hour**
   This report shows both current and historical data about fuel and oil consumed per hour or mile. This report is ideal to determine if a particular asset is showing signs of fatigue.

2. **Asset Billing**
   This report is a printed version of the Log History and shows each entry for each vehicle and the entry’s corresponding meter readings along with fuel and oil amounts.
3. **Budget Billing**
This report lists the expense transactions that affect each Budget. The report is similar to the Asset Billing report, but also shows all assets and a Sort By option of Budget ID.

4. **Miles/Hours Log**
This report prints the current totals of each asset, including entries that have been saved but not posted in the Log Entry window. You can also print a blank form, so you can gather meter readings.

5. **Cost per Mile/Hour**
This report calculates the costs of maintenance (from completed work orders), fuel, and oil for your assets and show it as a cost per mile and/or cost per hour.

6. **Availability**
This report shows the percentages of time that your assets were down versus operational. You can set up to two different date ranges on the report for comparison purposes. This report is only available when the Hours | Odometer checkbox in Setup | Modules | Logs not checked.

**Search Criteria**
Search Criteria for a report may be added before printing a report. For help with adding search criteria, please reference Figure 9-2 earlier in the chapter.

**Sort By**
Select the appropriate field from the Sort By drop down list to sort the report records. Each report may have different Sort By options.

**Paper & Orientation**
Reports are printed in a Portrait and on an 8 1/2 X 11 sheet of paper. Some report are available on an 8 1/2 X 14 sheet of paper.

**Send To**
You may select from several options to print a report. When you have made your selection, click the [Print] icon.
Chapter 10
Chemical Applications

This chapter includes the following sections:

- Introduction
- Adding and Editing Chemical Applications
- Chemical Application Reports
Introduction

The Chemical Applications Module allows you to track the application of substances such as fertilizers, insecticides, pesticides, and herbicides.

To access the Chemical Applications Module, click the Chemical Applications icon on the tool bar or click Modules | Chemical Applications from the main program menu. See Figure 10-1.

![Figure 10-1](image)

The Chemical Applications window opens. The List tab is open by default.

Chemical Applications Tips

Several features of the Chemical Applications window makes printing, viewing, searching, and sorting easier.

Print

From any tab on the Chemical Applications window, you can quickly access Chemical Applications Reports by clicking on the [Print] button.
There are options to Print, Print Selected, and Export List. Print will open the Chemical Applications Reports window with no report search criteria set, while the Print Selected option will automatically set the report search criteria to the currently selected chemical applications records. To select multiple chemical applications records, hold the Ctrl key down and click each record. Export List has options to create a Microsoft Excel, HTML, CSV, or XML file with the data from the List tab.

**Search Criteria**

You may want to limit the number of chemical applications records that appear on the List tab of this module. Setting Search Criteria is an easy way to sort and display only the records you want. See Figure 10-2.
**Example:** Your organization be in charge of several sites that require chemical applications, but you are interested in seeing all the requested chemical applications for the Site PARK 19.

**Note:** The Site PARK 19 is used for example purposes. Your asset sites will be based on your data.

**Procedure: Search Criteria in Chemical Applications Module**

1. By default, a search criteria line will appear in the Chemical Applications Criteria window. Select the search criteria line.

2. Click the pencil and paper icon to allow editing of the search criteria line. You may also double-click the line.

3. The first drop-down list contains fields that can be used in the search criteria. Select *Site* from the list.

4. The label between the drop-down lists allows you to specify an operator. Clicking on the label allows you to change the operator. Verify *is equal to* is selected.

5. The second drop-down list contains the data that is available for the field selected in the first drop-down list. Select PARK 19 from the list.

6. Click the OK button. The Logs List will now only display chemical applications for site PARK 19.

**Note:** This feature works the same way in Chemical Applications Reports.

---

**Favorites**

You can save Search Criteria to a Favorites list so it can be reused at a later time. After setting your Search Criteria, click the *Save to Favorites* icon and type a name for your favorite. Click [Save] and your new Favorite will appear in your Favorites list.

---

**Selection**

The Selection drop-down list located at the top of the List tab allows you to quickly change the criteria for data in the grid. The Selection list will contain some program default selections as well as any custom criteria that was saved using the Favorites feature of the Search Criteria window.
Grid Options

Common to most grids in ManagerPlus Pro are several features that allow you to quickly search, sort and customize data grids.

Sorting
To quickly sort data in grid, click the column title. A faded arrow pointing up will appear next to the column title indicating the data is being sorted in ascending order. To sort the data in descending order, click the column title a second time and a faded arrow pointing down will appear next to the column title.

Quick Search
Quick Search finds data based on the currently sorted column. With any record selected in the grid, begin typing the first few characters of the value you are attempting to find. The Quick Search feature will automatically move you to the first record matching the characters that you typed.

Configuring
Grid column sizes can be changed by holding your mouse down between the column titles and moving the border. Grid column order may be changed by holding your mouse down on a column title and moving it to the desired location. To add or remove columns in a grid, click the small button located in the upper left hand corner of the grid.

Grouping
To enable grouping of data by specific columns in the grid, right-click in the grid and select Show Grouping. If this feature is enabled, a section above the grid will appear allowing you drag and drop column headers for grouping grid data.
Drop-Down Lists

Many drop-down lists can be modified directly from the module. To add, edit or delete drop-down list values, move your mouse over the field and double-click. An edit window will appear that will allow you to modify the list. When double-clicking, verify the list is not dropped down.
Adding and Editing Chemical Applications

When you click the Chemical Applications icon on the tool bar or click Modules | Chemical Applications from the main program menu, the Chemical Applications window opens with the Required Applications tab open by default. See Figure 10-3.

Figure 10-3
List

The List sub-tab displays all your chemical applications in a grid. By default, the list is sorted by Entry number. Use the scroll bar on the right side of the window to navigate through the list.

No data fields can be populated or changed from the List sub-tab. To go to the records where changes can be made, highlight a record by clicking anywhere in its row then click the Details sub-tab. Or, to add a new application record, click the [Add] button. The program switches to the Details sub-tab with the Entry # field already populated. See Figure 10-4.
**Details**

The Details tab holds all the information about a chemical application.

**Entry Number**
The Entry Number is assigned automatically by the system and is unique. You cannot change this number.

**Budget ID**
Click the drop-down arrow and select a budget for this application.

**Reason**
Type in the reason for the application.
Location
Type in the location for this application.

Site
If this application will occur on a piece of property that you have listed as an asset, click the drop-down arrow and select the site from your list of Grounds Assets.

Area Units
Click the drop-down arrow and select the area unit you use to measure this site. For example, ACRE, HECTARE, or SQ FOOT.

Size
Type in the number that goes with the area unit to measure this site. For example, for a 10-acre piece of property, select ACRE in the Area Units field and type in “10.”

Tanks
The following fields belong to the Tanks group box.

Target
These fields allow you to set the target amount for this application. In the first box, type in the number of units you plan to use; in the second box, type in the volume number for each unit, and in the third box, use the drop-down arrow to select a unit of measure.

Example: You plan to apply five one-gallon units of a chemical. In the first box, type in 5; in the second, enter 1, and in the third box, click the drop-down arrow and select GALLON.

Actual
These fields allow you to view the actual amount used for this application. In the first box, type in the number of units used; in the second box, type in the volume number for each unit; and in the third box, use the drop-down arrow to select a unit of measure.

Example: For the chemical in the example above, you actually applied four one-gallon units of the chemical. In the first box, type in 4; in the second, enter 1, and in the third box, click the drop-down arrow and select GALLON.
**Application Type**
In this group box, click the checkbox next to the group that best describes the type of chemical used, such as Herbicide or Growth Regulator.

**Winds**
Type in the direction and velocity of the wind at the time of the application.

**Temperature**
Type in the temperature at the time of the application. Be sure to note if the Fahrenheit or Celsius scale is used.

**Humidity**
Type in the relative humidity at the time of the application.

**Other**
Type in any other significant information about conditions at the time of the application.

The Details sub-tab includes several additional sub-tabs. Chemicals is open by default.

**Chemicals**
The Chemicals sub-tab includes information about the chemical being applied. The information is displayed on more than one window. To switch windows and view or edit additional information about the selected chemical, click the other radio buttons in the Show group box. The default button is Chemical Information; the others are Target Amounts, Actual Amounts, Target vs Actual, and Fertilizer Information.

You can add or edit information in fields on any of these windows by clicking in the field to highlight it. In some fields, a drop-down arrow appears, so you can select information from a list. If no arrow appears, simply type the correct information into the field.

**Part ID**
Click the right end of the Part ID field and a drop-down arrow appears. Click it to display a list of all parts with a Type of CHEMICAL in your inventory. Click the part being applied to select it.
When you select a Part ID, in this field and in the other Chemicals windows, they are populated with information from the part record in Inventory. To change any of these fields, click in it and enter the new information. Click [Save] to save the changes.

When you are finished editing the Chemicals sub-tab, click Labor.

**Labor**

On the Labor sub-tab, you can add information about the employee or employees who performed the application. See Figure 10-5.

<table>
<thead>
<tr>
<th>Chemicals</th>
<th>Labor</th>
<th>Equipment</th>
<th>Approval/Checking</th>
<th>Instruction/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied By</td>
<td>Licence Number</td>
<td>Rate</td>
<td>Target Hours</td>
<td>Actual Hours</td>
</tr>
<tr>
<td>Simmons, Brad</td>
<td>1412345KAD23412</td>
<td>$25.00</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

**Figure 10-5**

To add an employee, click in the Applied By field. A drop-down arrow appears. Click it and select the person who applied the chemicals from a list of your employees. You may type a name into the field if the name does not appear on the employee list. If the application was performed by several employees, you may type in the name of the lead person, team leader, or supervisor.

When you select a name from the employee list, the other fields on this sub-tab are populated automatically. To add or edit information in these fields, click in the field and type in the new information. Click [Save] when you are finished.

When you are finished editing the Labor sub-tab, click Equipment.

**Equipment**

On the Equipment sub-tab, you can add information about any equipment used as part of this application. See Figure 10-6.
Figure 10-6

To add a piece of equipment, click in the Equipment field. A drop-down arrow appears. Click it to select a piece of equipment from among your assets. If the equipment does not appear on the assets list, you may type it in.

To add additional information about the equipment, click in the other fields and type the information. Click [Save] when you are finished.

When you are finished editing the Equipment sub-tab, click Approval/Checking.

Approval/Checking

If you want a supervisor to sign off on this application, use the Approval/Checking sub-tab. See Figure 10-7.

Figure 10-7

Use the drop-down arrows to select the employees who approved, applied, and checked the application. There are also fields for you to
enter the date and time of the application and the date of the approval. Finally, there is a Status field where you can track the status of this application. Use the radio buttons to indicate whether the application is Requested, Applied, or Checked. Once it is checked, it is ready to be posted.

When you are finished editing the Approval/Checking sub-tab, click Instructions/Notes.

**Instructions/Notes**

This sub-tab contains two free-form text fields where you can type in special instructions for the employee performing the application, or the employee can add notes about the application once it has been performed. See Figure 10-8.

![Figure 10-8](image)

Click in the fields to type in the notes or instructions. When you are finished, click [Save].
Chemical Application Reports

You can generate and print several reports about your chemical applications. To access Chemical Application Reports, from the main ManagerPlus Pro menu, click the Chemical Application Reports icon on the tool bar, or click Reports | Chemical Applications. See Figure 10-9. If you are already in the Chemical Applications module, you can access Chemical Applications Reports by clicking on the [PRINT] button near the top left corner of the window.

Figure 10-9

The Chemical Application Reports window appears. See Figure 10-10.
There are several Chemical Application Reports that you can view or print. To select one, click report icon. Your choices are the following:

1. **Chemical Application Detail**
   This report prints the Detail information for the selected applications.

2. **Chemical Application Authorization**
   This report prints a pre-application authorization form that your employees can use to initiate the application.

3. **Chemical Application Summary**
   This report prints a summary of your required applications.
4. Chemical Application Variance
This report prints a summary of the target, actual, and variance amounts of the chemicals used in your applications.

5. Chemicals Used
This report prints a summary of the chemicals and amounts used in your applications.

6. Equipment Used
This report prints a summary of the equipment used during your applications.

7. Labor
This report prints a summary of the labor costs associated with your applications.

8. Fertilizer by Site
This report prints a summary of the fertilizer used in your applications, sorted by site.

Search Criteria
Search Criteria for a report may be added before printing a report. For help with adding search criteria, please reference Figure 10-2 earlier in the chapter.

Sort By
Select the appropriate field from the Sort By drop down list to sort the report records. Each report may have different Sort By options.

Paper & Orientation
Reports are printed in a Portrait and on an 8 1/2 X 11 sheet of paper. Some report are Landscape format.

Send To
You may select from several options to print a report. When you have made your selection, click the [Print] icon.
Chapter 11
Asset Tracking

This chapter includes the following sections:

- Introduction
- Assigning and Returning Assets
- Asset Tracking Reports
ManagerPlus Pro includes an optional asset tracking feature that allows you to keep track of assets that are checked out to employees. To access Asset Tracking, from the main program window, click the Asset Tracking icon or click Modules | Asset Tracking. See Figure 11-1.

The Asset Tracking window opens with the Asset Assignments tab open by default. See Figure 11-2.

**Asset Tracking Tips**

Several features of the Asset Tracking window makes printing, viewing, searching, and sorting the part list easier.

**Print**

From any tab on the Asset Tracking window, you can quickly access Asset Tracking Reports by clicking on the [Print] button. There are options to *Print, Print Selected, and Export List*. *Print* will open the
Asset Tracking Reports window with no report search criteria set, while the *Print Selected* option will automatically set the report search criteria to the currently selected asset tracking records. To select multiple asset tracking records, hold the Ctrl key down and click each record. *Export List* has options to create a Microsoft Excel, HTML, CSV, or XML file with the data from the List tab.

**Search Criteria**

You may want to limit the number of asset tracking records that appear on the List tab of this module. Setting Search Criteria is an easy way to sort and display only the records you want. See Figure 11-2.

![Figure 11-2](image-url)
**Example:** An organization may have many different assets that are assigned to employees and you would like to only view assets that are in the TOOLS asset group.

**Note:** The asset group TOOLS is used for example purposes. Your asset groups will be based on your data.

**Procedure: Search Criteria in Asset Tracking Module**

1. By default, a search criteria line will appear in the Asset Tracking Criteria window. Select the search criteria line.

2. Click the pencil and paper icon to allow editing of the search criteria line. You may also double-click the line.

3. The first drop-down list contains fields that can be used in the search criteria. Select Group from the list.

4. The label between the drop-down lists allows you to specify an operator. Clicking on the label allows you to change the operator. Verify is equal to is selected.

5. The second drop-down list contains the data that is available for the field selected in the first drop-down list. Select TOOLS from the list.

6. Click the OK button. The Asset Tracking List will now only display assets assigned the TOOLS group.

**Note:** This feature works the same way in Asset Tracking Reports.

**Favorites**

You can save Search Criteria to a Favorites list so it can be reused at a later time. After setting your Search Criteria, click the Save to Favorites icon and type a name for your favorite. Click [Save] and your new Favorite will appear in your Favorites list.

**Grid Options**

Common to most grids in ManagerPlus Pro are several features that allow you to quickly search, sort and customize data grids.

**Sorting**

To quickly sort data in grid, click the column title. A faded arrow pointing up will appear next to the column title indicating the data is being sorted in ascending order. To sort the data in descending order, click the
column title a second time and a faded arrow pointing down will appear next to the column title.

**Quick Search**
Quick Search finds data based on the currently sorted column. With any record selected in the grid, begin typing the first few characters of the value you are attempting to find. The Quick Search feature will automatically move you to the first record matching the characters that you typed.

**Configuring**
Grid column sizes can be changed by holding your mouse down between the column titles and moving the border. Grid column order may be changed by holding your mouse down on a column title and moving it to the desired location. To add or remove columns in a grid, click the small button located in the upper left hand corner of the grid.

**Grouping**
To enable grouping of data by specific columns in the grid, right-click in the grid and select *Show Grouping*. If this feature is enabled, a section above the grid will appear allowing you drag and drop column headers for grouping grid data.
Asset Assignments

The top portion of the Asset Assignments tab lists all assets that have been designated as assets that you want to track. To designate an asset for tracking, the Use in Asset Tracking checkbox in the Asset module’s Detail tab must be checked for the asset. To select an asset, highlight its row. The asset's assignment history appears on the bottom of the window. See Figure 11-3.

Selection
The Selection drop down list allows to quick view records in the assignments list for Assigned, Returned or All records. The system defaults to only view Assigned records.
Assign Asset
To assign an asset to an employee, click the [Assign Asset] button. A popup window with a list of employees will appear. Select an employee and click the check mark in the upper left hand corner of the window. An assignment record will be created. You may select a Location and enter information into the Notes field. The Date Assigned may also be modified by clicking in the field on the grid.

Return Asset
To return an asset, select the asset from the list at top and ensure the assignment record is select in the bottom grid. Click the [Return Asset] button. The system will automatically set the Date Returned field to today’s date and time.

Employee Assignments
The Employee Assignments tab also shows the asset tracking history, but it is by employee. The employee records are listed at the top of the tab and their asset checkout histories are listed at the bottom. This view provides a quick method for view all assets assigned to employee versus looking for who is assigned to a particular asset.

Selection
The Selection drop down list allows to quick view records in the assignments list for Assigned, Returned or All records. The system defaults to only view Assigned records.

Assign Asset
To assign an employee to an asset, click the [Assign Asset] button. A popup window with a list of assets will appear. Select an asset and click the check mark in the upper left hand corner of the window. An assignment record will be created. You may select a Location and enter information into the Notes field. The Date Assigned may also be modified by clicking in the field on the grid.

Return Asset
To return an asset, select the employee from the list at top and ensure the assignment record is select in the bottom grid. Click the [Return
Asset] button. The system will automatically set the Date Returned field to today’s date and time.
Asset Tracking Reports

You can generate and print two asset tracking reports. To access Asset Tracking Reports, from the main ManagerPlus Pro menu, click the Asset Tracking Reports icon on the tool bar, or click Reports | Asset Tracking. See Figure 11-4. If you are already in the Asset Tracking module, you can access Asset Tracking Reports by clicking on the [PRINT] button near the top left corner of the window.

Figure 11-4

The Asset Tracking Reports window appears. See Figure 11-4.
There are two Asset Tracking Reports that you can view or print. To select one, click the option button next to the report title. Your choices are the following:

1. **Employee / Asset Assignments**
   This report displays asset assignments by employee or by asset.

2. **Employee Asset Checkout Form**
   This report allows you to print a form that your employees can use when checking out assets.

**Search Criteria**
Search Criteria for a report may be added before printing a report. For help with adding search criteria, please reference Figure 11-2 earlier in the chapter.
Sort By
Select the appropriate field from the Sort By drop down list to sort the report records. Each report may have different Sort By options.

Paper & Orientation
Reports are printed in a Portrait and on an 8 1/2 X 11 sheet of paper.

Send To
You may select from several options to print a report. When you have made your selection, click the [Print] icon.
Appendix A

- How to Contact ManagerPlus
Contact Information

Customer Success Team  
Phone: 1-800-730-9809  
www.managerplus.com/product_support.php

Sales  
Phone: 1-800-730-9965  
(7:30 a.m. to 4:30 p.m. MST, Monday-Friday)  
www.managerplus.com/contact.php

Professional Services & Training  
Phone: 1-800-730-9965

Product Suggestions  
www.managerplus.com/feedback.php

FAX  
1-801-281-3566

Mailing Address  
ManagerPlus Solutions, LLC  
9350 South 150 East Suite #650  
Sandy, UT 84070  
1-800-730-9965
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