on Data Systems

anagement Users Guide
Tree Inventory

By

g up Tree Inventory

Tree Catalog

To access the Tree Catalog, go to View, System Modules, and then click on Tree Catalog.

There are four levels to tree classification:

Family: A singe or group of genus that closely or uniformly resemble each other in general appearance and technical character.

Genus: A group of tree species that have fundamental traits in common but differ in other, lesser characteristics.

Species: A natural group of trees in the same genus made of similar individuals.

Variety: A subdivision of species having a distinct, though often inconspicuous, difference and breeding true to that difference.

On the left side of the screen is where the tree catalog will be built. Start to build your list under the Trees heading.

First the tree family will have to be entered, click on <Family> and enter the name. Once that has been entered, click on the dot next to the family name and the next level will appear. Click on <Genus> and fill in that name. Under genus click on <Species> to enter the tree species (there may be more than one species per genus). To enter the variety, click on <Variety> under the species.

A darkened circle or arrow indicates there is more information listed, click on it expand or collapse.

An open circle indicates there is no other information listed below.

To attach a picture, first locate and define a path to the folder the picture file is saved. Click on the image box on the lower right to attach a picture.

Each classification type can have a common name, scientific name, and abbreviation attached.
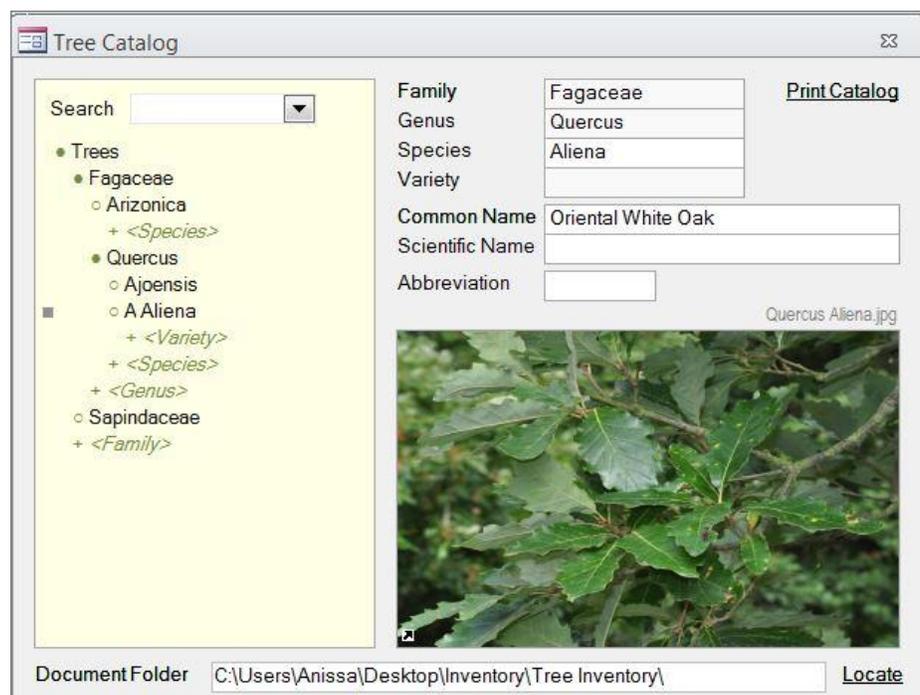
reen, the catalog can be printed.

Species	Variety	Common Name	Scientific Name	Code
Aceraceae				
Acer				
negundo		boxelder		
pennsylvanicum		striped maple		
rubrum		red maple		
saccharinum		silver maple		
saccharum		sugar maple		
Anacardiaceae				
Rhus		Wax Tree		
copallina		shining sumac		
glabra		smooth sumac		
typhina		staghorn sumac		
Toxicodendron		Posin Sumac		
pubescens		poison-oak		
radicans		poison-ivy		
vernix		poison-sumac		
Annonaceae				
Asimina		PawPaw		
triloba				
Aquifoliaceae				
		Holly		
Ilex				
decidua		possumhaw		
opaca		American holly		
Araliaceae				
Aralia				
spinosa		devil's walking stick		
Betulaceae				
Alnus				
serrulata		common alder		
Betula				
nigra		river birch		
Carpinus				
caroliniana		American hornbeam		
Ostrya				
virginiana		eastern hophornbeam		
Bignoniaceae				

To setup and access the service schedule for tree inventory, go to System Modules under the View ribbon and select Service Schedules.
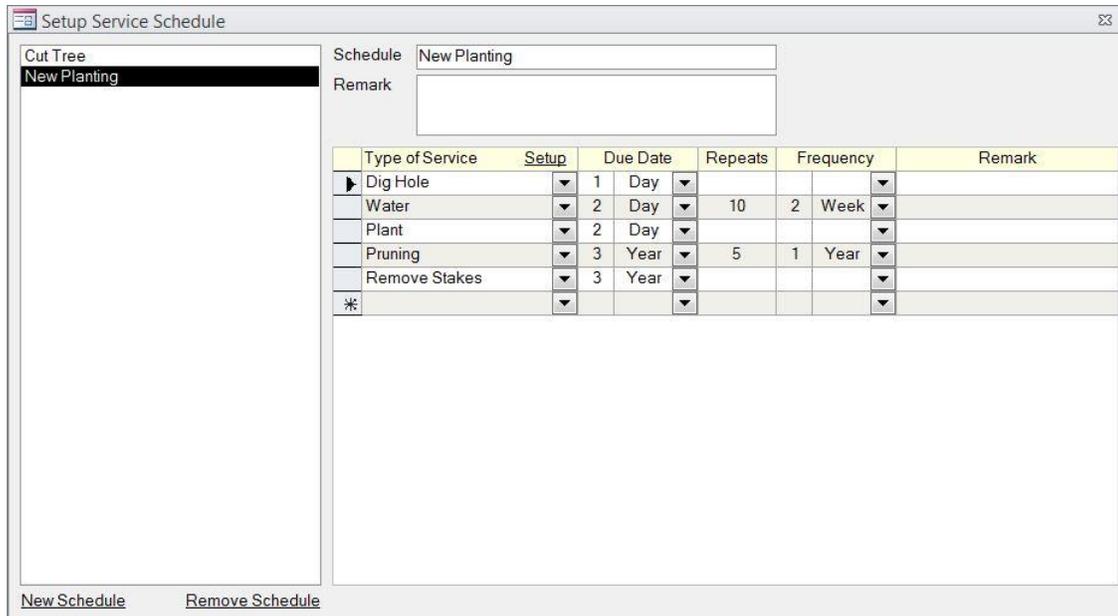
To create a new schedule click on New Schedule on the bottom left of the screen. Below the schedule name is a remark field, use this to enter any description needed. For each schedule category a list of service types will be assigned. You will also need to assign a due date and frequency for each type of service. To attach a service type, click on the drop down arrow under Type of Service.

For example the first step in planting a new tree would be to dig a hole, the due date would be set to 1 day (first day of the project). This task would not need to be repeated, so the repeat and frequency would be left blank. The next step would be to plant the tree, again this is set to the next day in the project cycle (this is another step that doesn't need to be repeated). The next step would be to water the tree, the start due date is set to the start day for this task, then the frequency is set to 10 times for a 2 week period.

The service list can be modified once the schedule is attached to a property.

Type of Service: A task that needs to be completed in the service category.

Due Date: Set day of project cycle that the task needs to be completed. This can be set to a day, week, or year in the life of the project.

Repeats: How many times a task needs to be completed in a specific time frame.

Frequency: How often a task needs to be performed.

Remark: Can be used a note or description.

New service types can be added to the list as needed. To create a service type, click on View, System Modules and select Service Schedule. The setup button is located next to type of service header.

*Click on Setup to create new service types, or click on the asterisk.
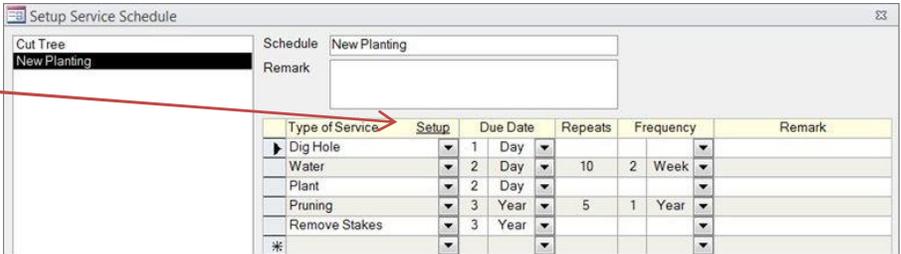
To create a service type, click on New Service Type on the bottom left of the screen. A prompt will appear to enter in the type name.

Next assign a reporting category by clicking the drop down menu, or typing it in the field.

Auto Number: This is how the system assigns a number to the service order. This is where a prefix and length of the order number can be added.

Assigned To: Designate an employee to complete the scheduled task. A person can also be assigned once the order is created.

Approx. Time: Set an approximant amount of time for the task to be completed.

Service Charge: Fee for service if applicable.

Dist. Account: Attach a fund accounting code, designated code the service charge is applied to.

Remarks: Can be used as notes or outcome results.
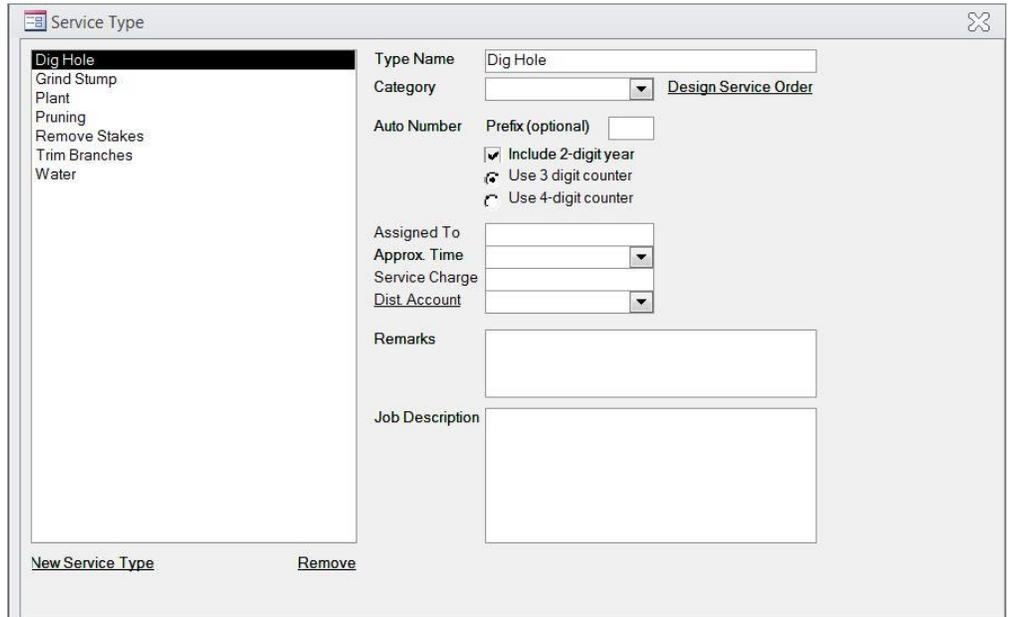
Job Description: Details of the task to be completed.

Design Service Order: Service Orders are optional, and do not need to be created for every service type. Details on how to create a service order template are on the next page.

To create or edit a service order template, go into System Modules, Service Schedule, then click on Design Service Order from the desired service type.
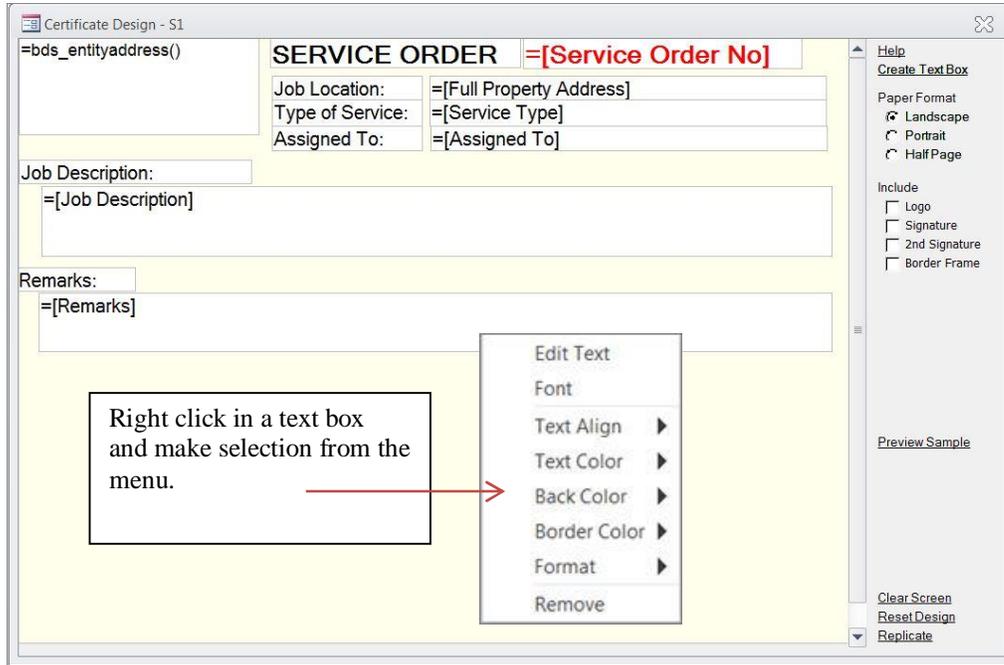

Each section of the service order is made up of text inside a text box. Click on Create Text Box on the right side of screen, drag the empty box to the desired location, and drop. Once a text box is in place, right click in the box and select edit text from the sub menu.

In the Edit Field Content screen you can pull information from the Property Management software, or type in text.

To Pull information from the software, first enter an equals sign (=), then make a selection from under Variable Fields or External Fields. Both options are located on the right side of the screen.

To save information make sure to click Save Changes and Close instead of closing out the X on the top of the screen.

∗Other items in the menu include font type, align text, text color, background color, boarder selection, format, and the option to remove a text box.
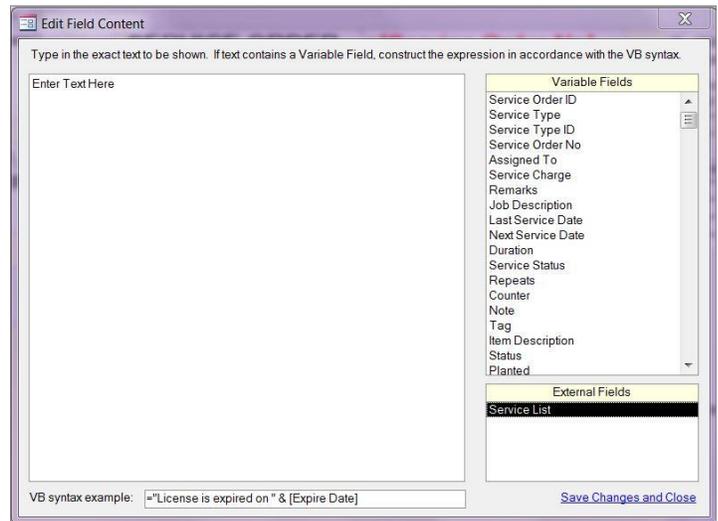
Clear screen allows you to erase the entire template whereas, Reset Design will set the template back to the default or original design.
Replicate Form allows you to copy in a template from another service order. Once it is brought in, simply edit the text boxes that need to be changed.

To create a new item in the tree inventory, go to View, Inquiry, and then select Tree Inventory.

At the bottom of the screen, click on the arrow with the asterisk ▶* to create a new record.

A prompt will appear, enter the next available tag number.

Enter Tag No. [   ]

The tree inventory screen can be ordered in two ways, either by the tree name (as listed below) or by the street name. When a name is highlighted in the upper left corner, the inventory list for that item type will display in the box below.
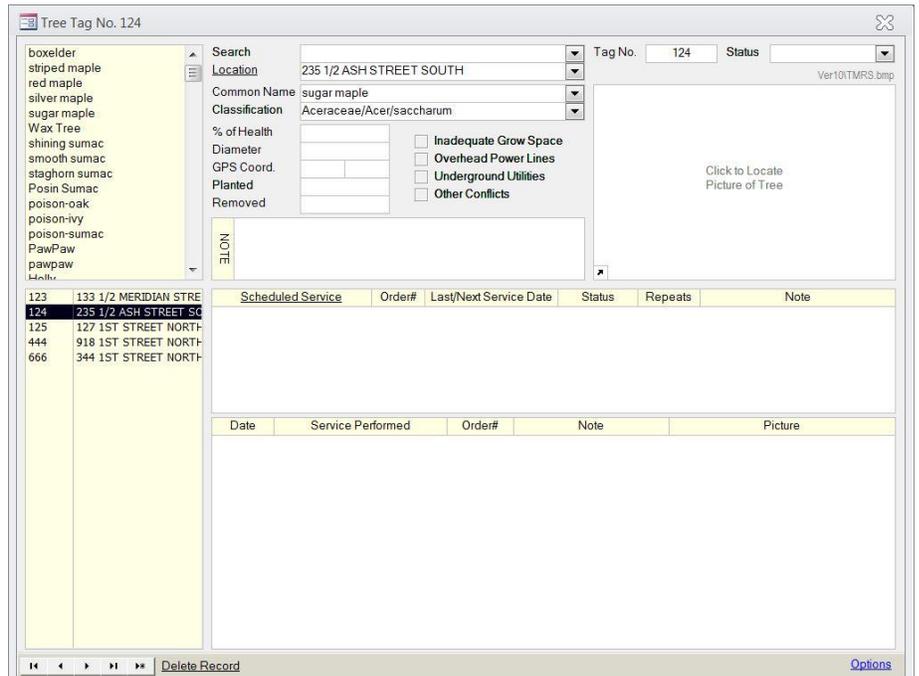
The search field allows you to lookup an existing record either by tag number or street address.

Location is the field to select the address for the tree tag using the drop down arrow. After an address has been selected, clicking on the location link will allow you to view other information related to that record.

Another way to search through the inventory list is to use the arrows at the bottom left of the screen.

Use the drop down arrow next to Common Name or Classification to select tree type. When one field is used to make the selection, the other will auto fill with the corresponding information.

Other information can be recorded about the tree in the notes box. Information pertaining to the health, diameter and GPS coordinates can be filled in as well. The planted and removed dates can be added, when applicable.

A status can be set for each record, type in the status if it is not available in the drop down menu. It will be saved in with the drop down menu list.

To add a picture of the tree, click on the box under the status. All pictures should be saved to the same folder (the folder location is set in system modules, under the tree catalog). Once the picture is loaded, click on the arrow in the bottom left corner to resize or crop.

The Options link at the bottom right corner of the screen allows you to set a default printer, link back to the setup tables, and change the list order. The list is located in the top left corner and can be sorted by street name or name of the item.

service schedule attached. To do this, click on

	Order#	Last/Next Service Date	Status	Repeats	Note

Click to select service type.
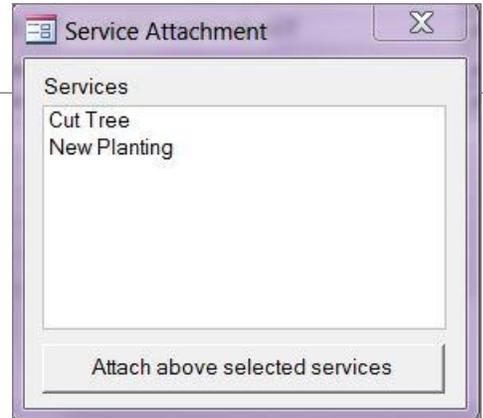
Service Attachment ☒

Services
Cut Tree
New Planting

Attach above selected services

A prompt will appear with the list of services.

Once the service type is selected, the items will fill in on the service schedule portion of the screen.

The services dates will automatically fill in based on the information in your setup. These dates can be changed once the service is added to the record.

A service order can be created for any items deemed necessary for a service order. Click on the service order box for the service, a prompt will appear to add a service order.

Once this has been added, fill in the service order information.

The type of service, job location, and item description will auto fill.

Assigned To: designated employee to complete the order.
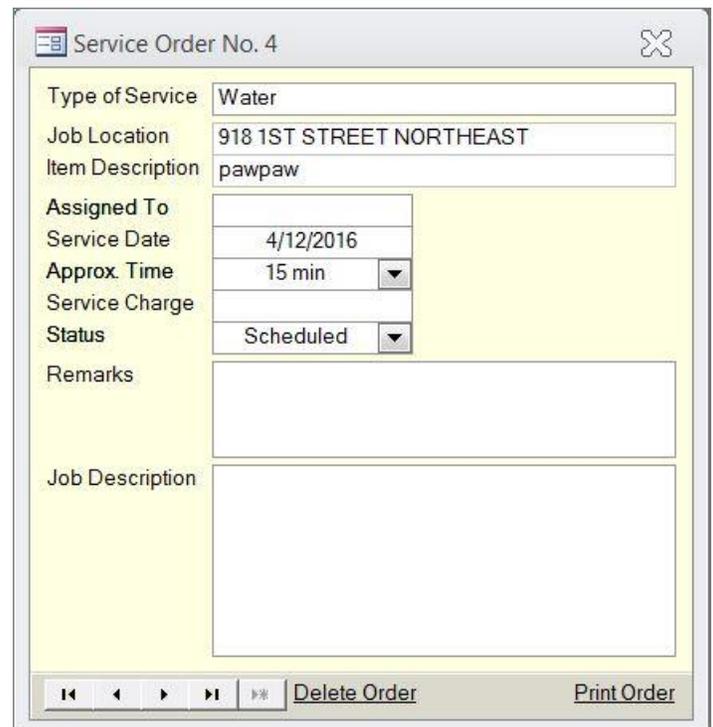
Service Date: Day of service.

Approx. Time: Set amount of time to complete the task.

Service Charge: Amount charged, if applicable.

Status: Stage of the order, most likely will be scheduled. However, other options are available for selection.

Remarks: Field to list possible outcomes.

Job Description: Detailed information regarding the task.

Service Order No. 4 ☒

Type of Service	Water
Job Location	918 1ST STREET NORTHEAST
Item Description	pawpaw
Assigned To	
Service Date	4/12/2016
Approx. Time	15 min ▼
Service Charge	
Status	Scheduled ▼
Remarks	
Job Description	

◄◄ ◄ ► ►► ►* Delete Order   Print Order

To print out the order, click on Print Order. Close the ╪xqat the top of the screen to exit.

he screen will update with the items from your setup. The
sed on the information from the setup screen, but these
dates can be modified to fit the project needs.

Once a task's status is changed to "completed" that date will move over to the last/next service field. If a task is to be repeated the new service date will update based on the criteria set in the service type table.

123	133 1/2 MERIDIAN STRE	Scheduled Service	Order#	Last/Next Service Date		Status	Repeats	Note
124	235 1/2 ASH STREET SC	Water		03/30/16	04/02/16	Scheduled ▼		
125	127 1ST STREET NORTH	Plant	3	03/30/16	03/30/16	Completed ▼		
444	918 1ST STREET NORTH	Dig Hole	2	03/31/16	03/31/16	Completed ▼		
666	344 1ST STREET NORTH	Remove Stakes	1	04/01/16	04/01/16	Completed ▼		

Date	Service Performed	Order#	Note	Picture
04/01/16	Remove Stakes	1		image012520160909031.jpg
03/31/16	Dig Hole	2		Ver10\fund.jpg
03/30/16	Water			
03/30/16	Plant	3		

As each service is marked as completed the items will list in the box below. This allows for the services that are repeated to be continually updated.

A picture can be attached to each completed task if it is found necessary.

With each new service that is required, click on the Scheduled Services link and attach the new service. Repeat the steps listed above to create a work order if necessary, and update the status as needed.

Periodic Processing

You will use Periodic Processing with tree inventory if you are using the service order feature. To access this, go to View, Periodic Processes, Tree Inventory, and select Print Scheduled Services.

Fill in the date of service you want to print.

Click on Print Service Orders to (default is to the screen first, which is recommended).
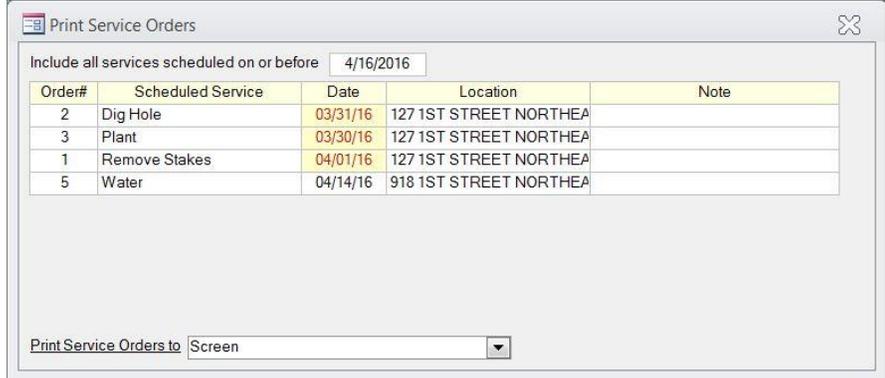
Print Service Orders

Include all services scheduled on or before   4/16/2016

Order#	Scheduled Service	Date	Location	Note
2	Dig Hole	03/31/16	127 1ST STREET NORTHEA	
3	Plant	03/30/16	127 1ST STREET NORTHEA	
1	Remove Stakes	04/01/16	127 1ST STREET NORTHEA	
5	Water	04/14/16	918 1ST STREET NORTHEA	

Print Service Orders to   Screen   ▼

Burnsville MN 55337

SERVICE ORDER   2

Job Location: 127 1ST STREET NORTHEAST
Type of Service: Dig Hole
Assigned To: HH
Date: 3/31/2016

New Planting: Order for Digging

Job Description:
    Dig hole for new planting.

Remarks:

Special Reporting

A log of the current inventory in located under Special Reports, then Tree Inventory.

Banyon Sample   04/14/16 11:48 AM
                                                    Page 1
Tree Inventory

Common Name	Scientific Name	Count
boxelder	Acer Negundo	1
pawpaw		1
poison-oak	Toxicodendron	1
sugar maple	Acer Saccharum	3