

Integration



Control



Mobility

## Installation and Configuration Guide

TAG for Microsoft

Dynamics 365 Business

Central

Simplicity



## Contents

<b>1. About TAG</b> .....	<b>3</b>
1.1 Version.....	3
1.2 License Requirements.....	3
<b>2. Installation files</b> .....	<b>3</b>
<b>3. Reference documents:</b> .....	<b>4</b>
<b>Solution Requirements:</b> .....	<b>4</b>
<b>Publishing and Installing TAG Extension in a New Business Central Database:</b> .....	<b>5</b>
<b>Publishing TAG Extension:</b> .....	<b>5</b>
<b>Installing TAG Extension:</b> .....	<b>5</b>
<b>Uninstalling TAG Extension:</b> .....	<b>7</b>
<b>Unpublishing TAG Extension:</b> .....	<b>8</b>
<b>Tag Configuration and Initial Master Code Setup</b> .....	<b>9</b>
<b>Initial Tag Master Code Setup:</b> .....	<b>10</b>
<b>TAG Quick start Transactions Guide</b> .....	<b>15</b>
Create a Work Request:.....	15
Create a Work Order from Request:.....	16
Create a Manuel Work Order: .....	17
Work Order Header and line Related Requirement:.....	18
Work Order Complete feature: .....	19
Reference finished work order statistics.....	21
Reference equipment statistics.....	22
<b>Appendix1</b> .....	<b>25</b>
<b>Maintenance Setup Navigation pane:</b> .....	<b>30</b>
<b>Maintenance Labour Navigation pane:</b> .....	<b>38</b>
<b>Maintenance Equipment Navigation pane:</b> .....	<b>40</b>
<b>Maintenance Inventory Navigation pane:</b> .....	<b>43</b>



## 1. About TAG

### 1.1 Version

Gathering, centralizing and managing all the data for your maintenance activities is challenging. The ideal solution is to combine your day-to-day collaboration tools with your maintenance software to use only one simple platform.

Tag (The Asset Guardian) is a Maintenance software solution built in Microsoft Dynamics. Tag is available across multiple versions of Microsoft Dynamics including Dynamics 365 Business Central.

Tag in Dynamics 365 Business Central is designed for use with the NAV Web Client. The installation of TAG requires publishing the extension using NAV Powershell. Once the extension has been added to the database, the Tag setup may be completed using the Nav Web client

### 1.2 License Requirements

TAG requires a standard Dynamics 365 Business Central license that has access to the solution's range.

## 2. Installation files

The TAG Extension Package (app) is the sole mandatory file; others are optional and are included to help you set up the solution.

TAG 365 Extension package

- "The Asset Guardian (TAG) CMMS.app"

Language files – English (United States, ENU)

The installation process is described below in the TAG Installation and Configuration Guide.



### 3. Reference documents:

- There are two documents for TAG to describe installation, configuration, functional description, data setup and scenario's:
  - Document 1: (current) Installation and Configuration Guide: TAG for Microsoft Dynamics 365 Business Central.
  - Document 2: Solution Whitepaper, Setup, and User Guide TAG Software: A Maintenance Solution (CMMS) For Microsoft Dynamics 365 Business Central.

## Installation and Configuration Guide: TAG for Microsoft Dynamics 365 Business Central.

### Solution Requirements:

Before installing TAG, please make sure that you fulfill the following prerequisites:

- You have administrative privileges on the machines where you plan to install the application
- You have the necessary permissions and licenses to install apps and create users
- Microsoft Dynamics 365 Business Central is available and functional
- TAG is distributed in a "The Asset Guardian (TAG) CMMS .app" file, before you start the actual installation, you copy this file and store them in an installation directory on your hard drive.

Note: The Tag Extension package includes the Tag objects in extension form, Tag permission sets, and modifications to user profile 'Business Manager'. It is important that after install the initial testing user is assigned profile 'Business Manager' to be able to see the TAG screens and complete the setup.



## Publishing and Installing TAG Extension in a New Business Central Database:

### Publishing TAG Extension:

To publish TAG365, open the Dynamics 365 Business Central Development Shell and copy this instruction:

Publish-NAVApp -ServerInstance **YourDynamicsNAVServer** -Path **MyExtension.app**

#### Notes:

**YourDynamicsNAVServer:** is the NAV Server Instance name.

**MyExtension:** is the package location including the name.

#### **Example:**

Publish-NAVApp -ServerInstance **TAGExtensions** -Path **C:\TAG\Ext\The Asset Guardian (TAG) CMMS.app**

**TAGExtensions** is the NAV server instance

**"C:\TAG\Ext\ The Asset Guardian (TAG) CMMS.app"** is the package location.

### Result:

Open Dynamics 365 Business Central, open Extension Management and view the status for TAG Extension Package:

Status will show "Not Installed" at this stage.

ADDITIONALINFO	NAME	VERSION
Installed	Ceridian Payroll	v. 2.0.21812.0
Installed	Dynamics GP Data Migration	v. 2.0.21812.0
Installed	Investnet Yodlee Bank Feeds	v. 2.0.21812.0
Installed	Essential Business Headlines	v. 1.0.21812.0
Installed	Image Analyzer	v. 1.0.21812.0
Installed	Microsoft Pay	v. 2.0.21812.0
Installed	PayPal Payments Standard	v. 2.0.21812.0
Installed	QuickBooks Data Migration	v. 2.0.21812.0
Installed	QuickBooks Online Data Migration	v. 2.0.21812.0
Installed	QuickBooks Payroll File Import	v. 2.0.21812.0
Installed	Sales and Inventory Forecast	v. 2.0.21812.0
Not installed	The Asset Guardian (TAG) - CMMS	v. 1.0.0.0

### Installing TAG Extension:

Once the Extension is published, you need to install it using this instruction:

Install-NAVApp -ServerInstance **YourDynamicsNAVServer** -Name **"My Extension"**

#### Notes:

**YourDynamicsNAVServer:** is the NAV server Instance name.

**My Extension:** is the package name.

#### **Example:**



Install-NAVApp -ServerInstance TAGExtensions -Name "TAG"  
TAGExtensions is the NAV server instance  
TAG is the package name.

```
Dynamics NAV TENERIFE Development Shell
Cmdlet Get-NAVAppInfo 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Get-NAVApplicationObjectProperty 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Get-NAVAppManifest 10.0.16... Microsoft.Dynamics.Nav.Apps.Tools
Cmdlet Get-NAVAppTableModification 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Get-NAVAppTenant 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Import-NAVApplicationObjectLanguage 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Install-NAVApp 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Join-NAVApplicationObjectFile 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Join-NAVApplicationObjectLanguageFile 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Merge-NAVApplicationObject 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet New-NAVAppManifest 10.0.16... Microsoft.Dynamics.Nav.Apps.Tools
Cmdlet New-NAVAppManifestFile 10.0.16... Microsoft.Dynamics.Nav.Apps.Tools
Cmdlet New-NAVAppPackage 10.0.16... Microsoft.Dynamics.Nav.Apps.Tools
Cmdlet New-NAVCrmTable 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Publish-NAVApp 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Remove-NAVApplicationObjectLanguage 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Remove-NAVAppsForTenant 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Repair-NAVApp 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Set-NAVApplicationObjectProperty 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Set-NAVAppManifest 10.0.16... Microsoft.Dynamics.Nav.Apps.Tools
Cmdlet Split-NAVApplicationObjectFile 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Split-NAVApplicationObjectLanguageFile 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Sync-NAVApp 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Test-NAVApplicationObjectLanguage 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Uninstall-NAVApp 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Unpublish-NAVApp 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Update-NAVApplicationObject 10.0.16... Microsoft.Dynamics.Nav.Model.Tools

PS C:\Windows\system32>
PS C:\Windows\system32> Install-NAVApp -ServerInstance TAGExtensions -Name "TAG_Extension_Package"
```

**Result:**

Open Dynamics 365 Business Central, open Extension Management and view the status for TAG Extension Package:

Status will show "Installed" if the installation was successful

ADDITIONALINFO	NAME	VERSION
Installed	Ceridian Payroll	v. 2.0.21812.0
Installed	Dynamics GP Data Migration	v. 2.0.21812.0
Installed	Investnet Yodlee Bank Feeds	v. 2.0.21812.0
Installed	Essential Business Headlines	v. 1.0.21812.0
Installed	Image Analyzer	v. 1.0.21812.0
Installed	Microsoft Pay	v. 2.0.21812.0
Installed	PayPal Payments Standard	v. 2.0.21812.0
Installed	QuickBooks Data Migration	v. 2.0.21812.0
Installed	QuickBooks Online Data Migration	v. 2.0.21812.0
Installed	QuickBooks Payroll File Import	v. 2.0.21812.0
Installed	Sales and Inventory Forecast	v. 2.0.21812.0
Installed	The Asset Guardian (TAG) - CMMS	v. 1.0.0.0

## Uninstalling and Unpublishing TAG Extension:

### Uninstalling TAG Extension:

To uninstall TAG, open the Dynamics 365 Business Central Development Shell and copy this instruction:  
**UnInstall-NAVApp -ServerInstance YourDynamicsNAVServer -Name "My Extension"**

#### Notes:

**YourDynamicsNAVServer:** is the NAV server Instance name.

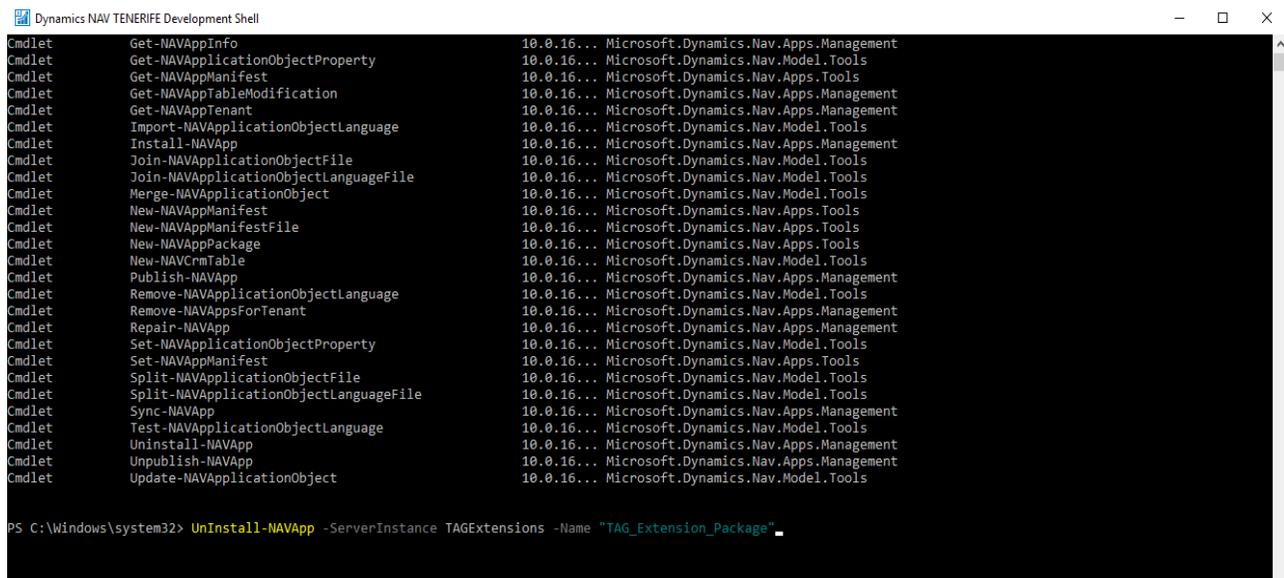
**My Extension:** is the package name.

**Example:**

UnInstall -NAVApp -ServerInstance **TAGExtensions** -Name "**TAG**"

**TAGExtensions** is the NAV server instance

**TAG** is the package name.



```

Dynamics NAV TENERIFE Development Shell
Cmdlet Get-NAVAppInfo 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Get-NAVApplicationObjectProperty 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Get-NAVAppManifest 10.0.16... Microsoft.Dynamics.Nav.Apps.Tools
Cmdlet Get-NAVAppTableModification 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Get-NAVAppTenant 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Import-NAVApplicationObjectLanguage 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Install-NAVApp 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Join-NAVApplicationObjectFile 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Join-NAVApplicationObjectLanguageFile 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Merge-NAVApplicationObject 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet New-NAVAppManifest 10.0.16... Microsoft.Dynamics.Nav.Apps.Tools
Cmdlet New-NAVAppManifestFile 10.0.16... Microsoft.Dynamics.Nav.Apps.Tools
Cmdlet New-NAVAppPackage 10.0.16... Microsoft.Dynamics.Nav.Apps.Tools
Cmdlet New-NAVAppTable 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Publish-NAVApp 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Remove-NAVApplicationObjectLanguage 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Remove-NAVAppsForTenant 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Repair-NAVApp 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Set-NAVApplicationObjectProperty 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Set-NAVAppManifest 10.0.16... Microsoft.Dynamics.Nav.Apps.Tools
Cmdlet Split-NAVApplicationObjectFile 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Split-NAVApplicationObjectLanguageFile 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Sync-NAVApp 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Test-NAVApplicationObjectLanguage 10.0.16... Microsoft.Dynamics.Nav.Model.Tools
Cmdlet Uninstall-NAVApp 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Unpublish-NAVApp 10.0.16... Microsoft.Dynamics.Nav.Apps.Management
Cmdlet Update-NAVApplicationObject 10.0.16... Microsoft.Dynamics.Nav.Model.Tools

PS C:\Windows\system32> UnInstall-NAVApp -ServerInstance TAGExtensions -Name "TAG_Extension_Package"
  
```

#### Result:

Open Dynamics 365, open Extension Management and view the status for TAG Extension Package as updated:

- Successful uninstall with show 'uninstalled'

ADDITIONALINFO	NAME	VERSION
Installed	Ceridian Payroll	v. 2.0.21812.0
Installed	Dynamics GP Data Migration	v. 2.0.21812.0
Installed	Investnet Yodlee Bank Feeds	v. 2.0.21812.0
Installed	Essential Business Headlines	v. 1.0.21812.0
Installed	Image Analyzer	v. 1.0.21812.0
Installed	Microsoft Pay	v. 2.0.21812.0
Installed	PayPal Payments Standard	v. 2.0.21812.0
Installed	QuickBooks Data Migration	v. 2.0.21812.0
Installed	QuickBooks Online Data Migration	v. 2.0.21812.0
Installed	Quickbooks Payroll File Import	v. 2.0.21812.0
Installed	Sales and Inventory Forecast	v. 2.0.21812.0
Not installed	The Asset Guardian (TAG) - CMMS	v. 1.0.0.0

## Unpublishing TAG Extension:

To unpublish TAG, open the Dynamics 365 Business Central Development Shell and copy this instruction:  
**UnPublish-NAVApp -ServerInstance YourDynamicsNAVServer -Name "My Extension"**

### Notes:

**YourDynamicsNAVServer:** is the NAV server Instance name.

**My Extension:** is the package name.

**Example:**

**UnPublish -NAVApp -ServerInstance TAGExtensions -Name "TAG"**

**TAGExtensions** is the NAV server instance

**TAG** is the package name.

```

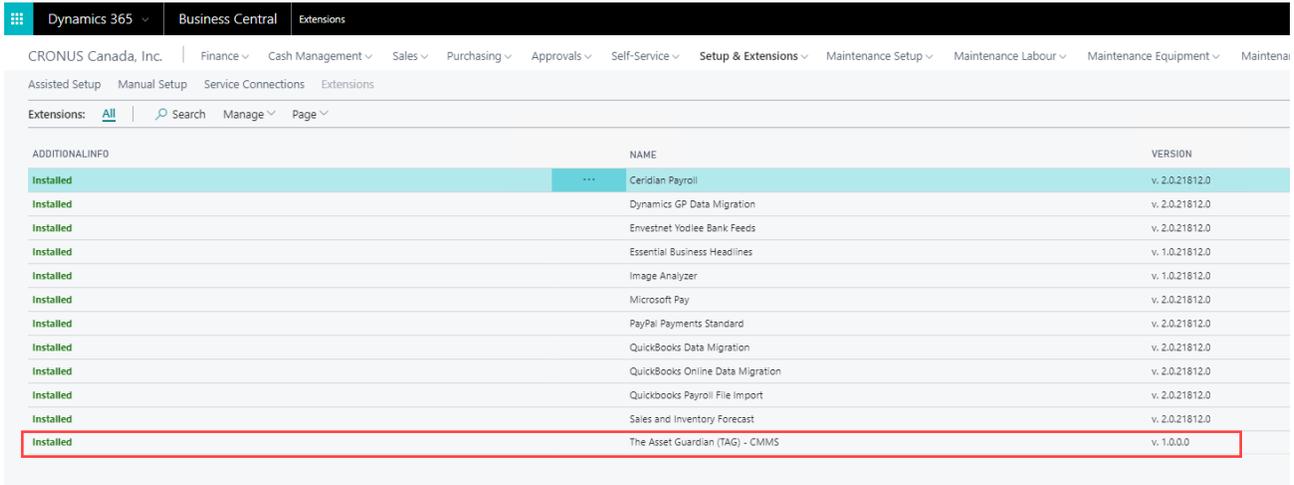
Dynamics NAV TENERIFE Development Shell
cmdlet Get-NAVAppInfo 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Management
cmdlet Get-NAVApplicationObjectProperty 10.0.16.0 Microsoft.Dynamics.Nav.Model.Tools
cmdlet Get-NAVAppManifest 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Tools
cmdlet Get-NAVAppTableModification 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Management
cmdlet Get-NAVAppTenant 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Management
cmdlet Import-NAVApplicationObjectLanguage 10.0.16.0 Microsoft.Dynamics.Nav.Model.Tools
cmdlet Install-NAVApp 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Management
cmdlet Join-NAVApplicationObjectFile 10.0.16.0 Microsoft.Dynamics.Nav.Model.Tools
cmdlet Join-NAVApplicationObjectLanguageFile 10.0.16.0 Microsoft.Dynamics.Nav.Model.Tools
cmdlet Merge-NAVApplicationObject 10.0.16.0 Microsoft.Dynamics.Nav.Model.Tools
cmdlet New-NAVAppManifest 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Tools
cmdlet New-NAVAppManifestFile 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Tools
cmdlet New-NAVAppPackage 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Tools
cmdlet New-NAVAppTable 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Management
cmdlet Publish-NAVApp 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Management
cmdlet Remove-NAVApplicationObjectLanguage 10.0.16.0 Microsoft.Dynamics.Nav.Model.Tools
cmdlet Remove-NAVAppsForTenant 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Management
cmdlet Repair-NAVApp 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Management
cmdlet Set-NAVApplicationObjectProperty 10.0.16.0 Microsoft.Dynamics.Nav.Model.Tools
cmdlet Set-NAVAppManifest 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Tools
cmdlet Split-NAVApplicationObjectFile 10.0.16.0 Microsoft.Dynamics.Nav.Model.Tools
cmdlet Split-NAVApplicationObjectLanguageFile 10.0.16.0 Microsoft.Dynamics.Nav.Model.Tools
cmdlet Sync-NAVApp 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Management
cmdlet Test-NAVApplicationObjectLanguage 10.0.16.0 Microsoft.Dynamics.Nav.Model.Tools
cmdlet Uninstall-NAVApp 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Management
cmdlet Unpublish-NAVApp 10.0.16.0 Microsoft.Dynamics.Nav.Apps.Management
cmdlet Update-NAVApplicationObject 10.0.16.0 Microsoft.Dynamics.Nav.Model.Tools

PS C:\Windows\system32> UnPublish-NAVApp -ServerInstance TAGExtensions -Name "TAG_Extension_Package"
  
```

**Result:**

Open Dynamics 365, open Extension Management, and view

- Successful Unpublish will show that the Tag365 Extension package is no longer displayed.



ADDITIONALINFO	NAME	VERSION
Installed	Ceridian Payroll	v. 2.0.21812.0
Installed	Dynamics GP Data Migration	v. 2.0.21812.0
Installed	Investnet Yodlee Bank Feeds	v. 2.0.21812.0
Installed	Essential Business Headlines	v. 1.0.21812.0
Installed	Image Analyzer	v. 1.0.21812.0
Installed	Microsoft Pay	v. 2.0.21812.0
Installed	PayPal Payments Standard	v. 2.0.21812.0
Installed	QuickBooks Data Migration	v. 2.0.21812.0
Installed	QuickBooks Online Data Migration	v. 2.0.21812.0
Installed	Quickbooks Payroll File Import	v. 2.0.21812.0
Installed	Sales and Inventory Forecast	v. 2.0.21812.0
Installed	The Asset Guardian (TAG) - CMMS	v. 1.0.0.0

**Tag Configuration and Initial Master Code Setup**

**Initial Validation:**

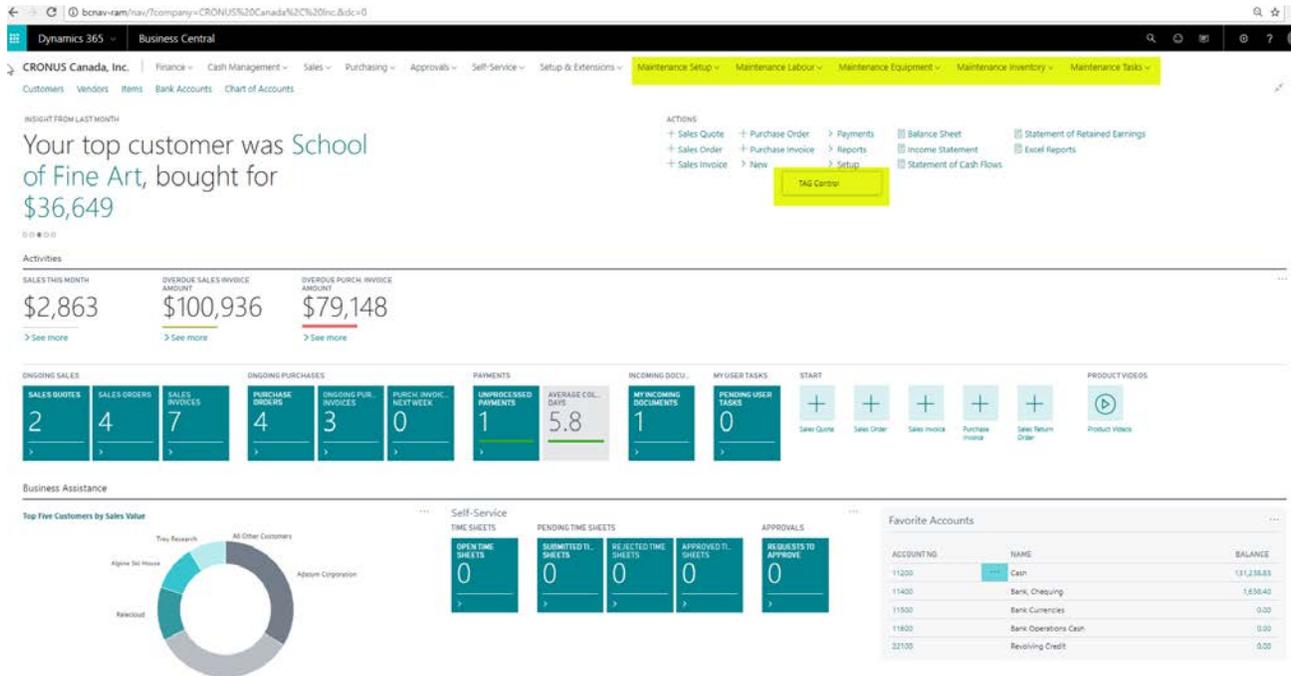
Open Dynamics 365 Business Central using the Web client to confirm current visibility of the TAG maintenance extension.

- Note: The user performing setup must have the ability to assign permission sets in Dynamics 365.
- Note: it is assumed that the validation will be performed with a second D365 user that will only have the Tag Permission sets, and not Super permission.

**Requirements:**

- The validating user ID must be assigned TAG permission sets:
  - o Tag-ALL\_R
  - o Tag-ALL\_RIMDE
- The validating user ID must have Role Tailored Client profile ‘Business Manager’ assigned
  - o Open the user personalization for Role Tailored Client
  - o Assign the validating user profile ‘Business Manager’
  - o Restart D365 by sign out and sign in.

On sign in after assigned permission sets and Profile, the role center page will show the below TAG Menus in the Navigation pane and one button (TAG Control) in the Action bar:



The screenshot shows the Dynamics 365 Business Central interface. At the top, the navigation bar includes 'Maintenance Setup', 'Maintenance Labour', 'Maintenance Equipment', 'Maintenance Inventory', and 'Maintenance Tools'. A yellow box highlights the 'TAG Control' button in the 'ACTIONS' section. Below this, a card displays 'Your top customer was School of Fine Art, bought for \$36,649'. The 'Activities' section shows 'SALES THIS MONTH' at \$2,863, 'OVERDUKE SALES INVOICE AMOUNT' at \$100,936, and 'OVERDUKE PURCH INVOICE AMOUNT' at \$79,148. The 'ONGOING SALES' section includes 'SALES QUOTES' (2), 'SALES ORDERS' (4), and 'SALES INVOICES' (7). The 'ONGOING PURCHASES' section includes 'PURCHASE ORDERS' (4), 'ONGOING PUR. INVOICES' (3), and 'PURCH. INVOICE NEXT WEEK' (0). The 'PAYMENTS' section includes 'UNPROCESSED PAYMENTS' (1) and 'AVERAGE COL. DAYS' (5.8). The 'INCOMING DOCV.' section includes 'MY INCOMING DOCUMENTS' (1) and 'PENDING USER TASKS' (0). The 'START' section includes buttons for 'Sales Quote', 'Sales Order', 'Sales Invoice', 'Purchase Invoice', and 'Sales Return Order'. The 'PRODUCT VIDEOS' section includes a 'Product Videos' button. The 'Business Assistance' section includes 'Top Five Customers by Sales Value' (a donut chart showing 'Tag Research', 'All Other Customers', 'Alpina Inc. House', and 'Alderm Corporation'), 'Self-Service TIME SHEETS' (0 OPEN, 0 SUBMITTED, 0 REJECTED, 0 APPROVED, 0 REQUESTS TO APPROVE), and 'Favorite Accounts' (a table with columns for ACCOUNTING, NAME, and BALANCE).

ACCOUNTING	NAME	BALANCE
11200	Cash	11,238.83
11400	Bank, Chequing	1,630.40
11500	Bank, Currencies	0.00
11800	Bank, Operations Cash	0.00
23100	Revolving Credit	0.00

## Initial Tag Master Code Setup:

To setup TAG master codes on Dynamics 365 for Business Central , perform the following steps:

**Important Note:** TAG requires that the TAG Plan value be set up first before any parts of TAG may be used. In Dynamics 365, this requires that the TAG Control button must be clicked first.

Clicking the Tag Control button automatically assigns the TAG Plan to 'Express' if the Tag Plan has not been already assigned another value (Express, Starter, Advanced, Enterprise).

Clicking the Tag Control button also allows the user to start setting up the required TAG parameters.

### 1. TAG Plan Setup up:

- **If you are already a TAG User (Customer/Partner):**
  - Go to VSD Web Site Licensing to get you Licensing key.
  - Go back to the Dynamics365 Business Central Control page and use the licensing key to setup and activate your TAG Plan.



Test3 Add new Product

EDIT	Product	TAG Plan	NAV account	NAV Password	NAV Company	Expiration date	Full users	Project manager	Lead users	Limited users
	test3	Starter	kKlenfalloum	@dnn999	Test3	04/20/2023	5	1	1	1

name	Profile 01	Profile 02	Profile 03	Profile 04
UserTest_301	Limited user	Limited user	Limited user	Limited user
UserTest_303	Full User	Full User	Full User	Full User

1 Click here to generate the licensing key for Tag Plan

INSIGHT FROM LAST MONTH  
Your top customer was School of Fine Art, bought for \$36,649

SALES THIS MONTH: \$2,863  
OVERDUE SALES AMOUNT: \$100

2 TAG Controls

General	Customer Name	Hours
Requested: 100	Basic CRM Equipment	4
Start: 100	Equipment List Order	10
Due to: 100	TAG Plan Selection	Option
Expiration: 100		

2 TAG Control

3 TAG Controls

5 TAG INITIAL SETUP

RAXzsrpRS9ZiXI72FtFJA ==

General

Tag Key: RAXzsrpRS9ZiXI72FtFJA == 4

Company: test165

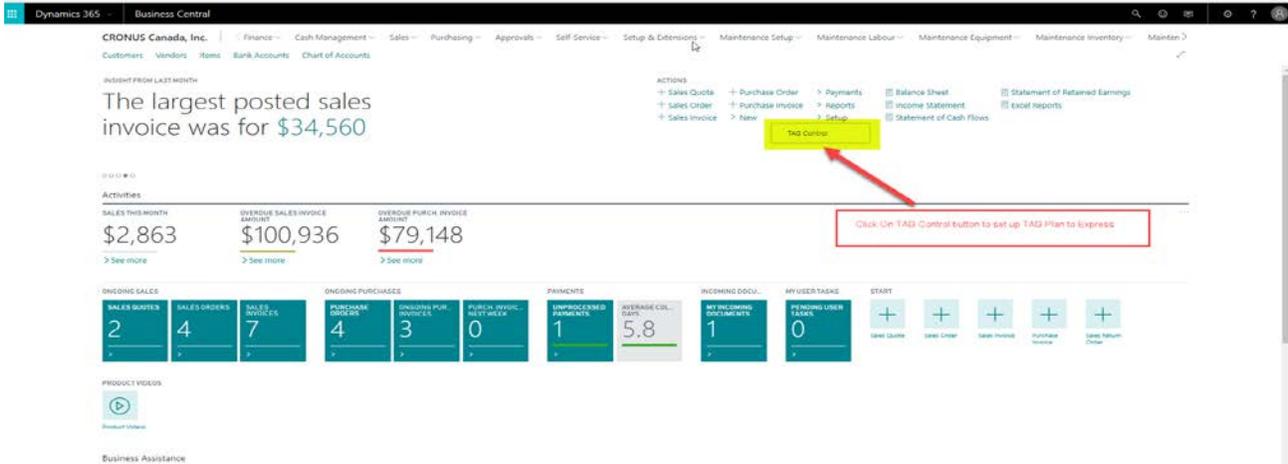
Last Validation Date: 4/27/2018

Expiration Date: 6/12/2018

6 Expiration

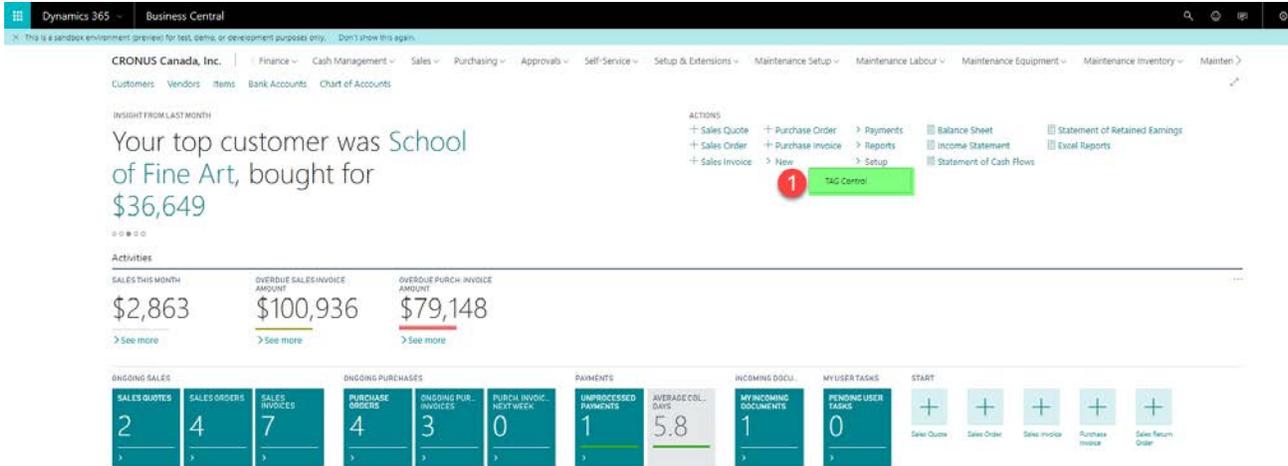
USER ACCOUNT	USER ID	COMPANY	VALID NAV USER	EXISTS IN TAG USER SETUP	LAST EXPIRY REMINDER	USER PROFILE
test 2	----		<input type="checkbox"/>	<input type="checkbox"/>		prof001
test1	----		<input type="checkbox"/>	<input type="checkbox"/>		Profile
test2	----		<input type="checkbox"/>	<input type="checkbox"/>		prof003

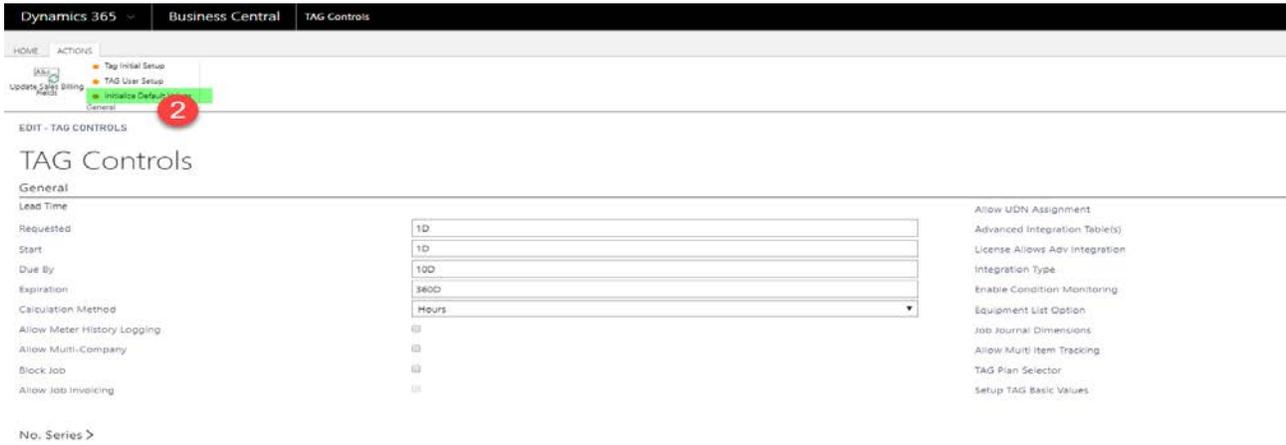
- If you are a new TAG user (Customer/Partner):
  - Click on TAG Control Action bar button and open the page, TAG will set “Express” by default for the TAG Plan.



## 2. Initial Setup Default values :

Once the Tag Plan is set on the control page, default values for required tables can be initialized in order to perform the testing properly (See Appendix 1 for more details). Follow the steps below:





### 3. TAG User Setup:

Once the default values initialized, you need to define a Tag User list. Follow the steps below:

- 1) In the maintenance setup Menu, click on the User Setup to open the list of existing User
- 2) Click on the new button on the ribbon to create a new User
- 3) Click on the User ID Field (three dot button) to select one of existing dynamics365 users
- 4) Select the desired user and click ok
- 5) Enter the User name, Technician Code, Default Requester Text and the desired permissions

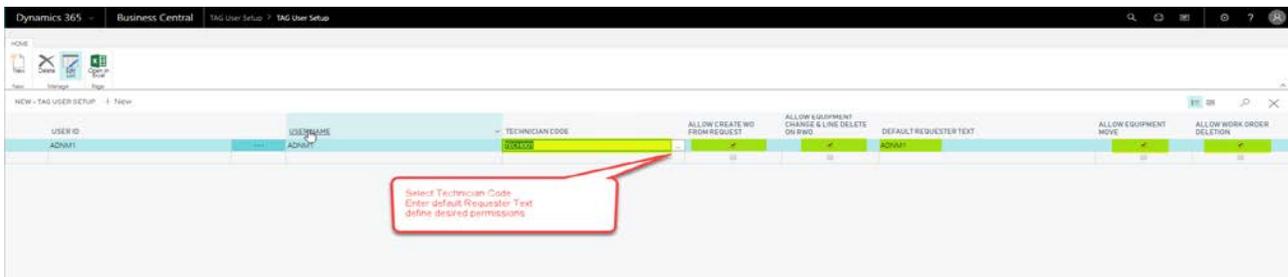
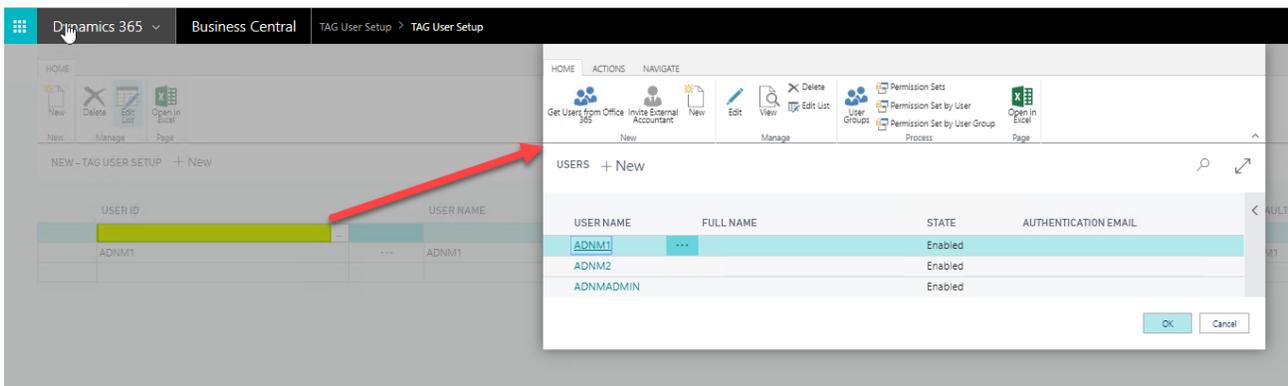
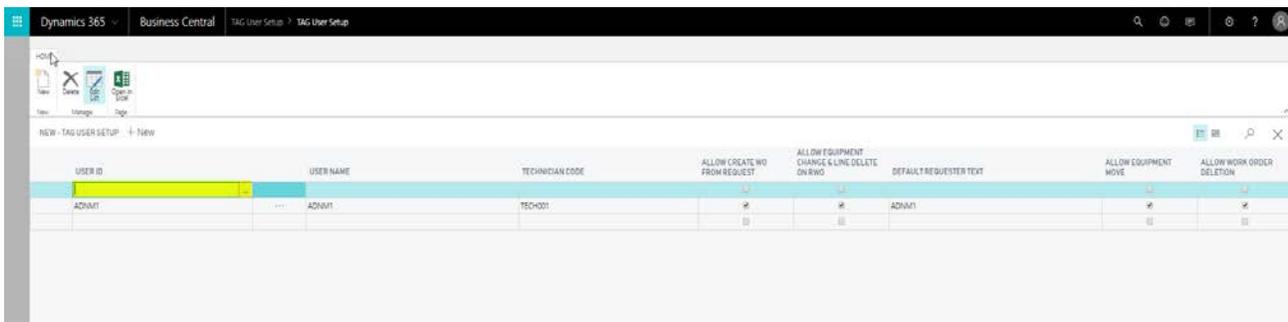
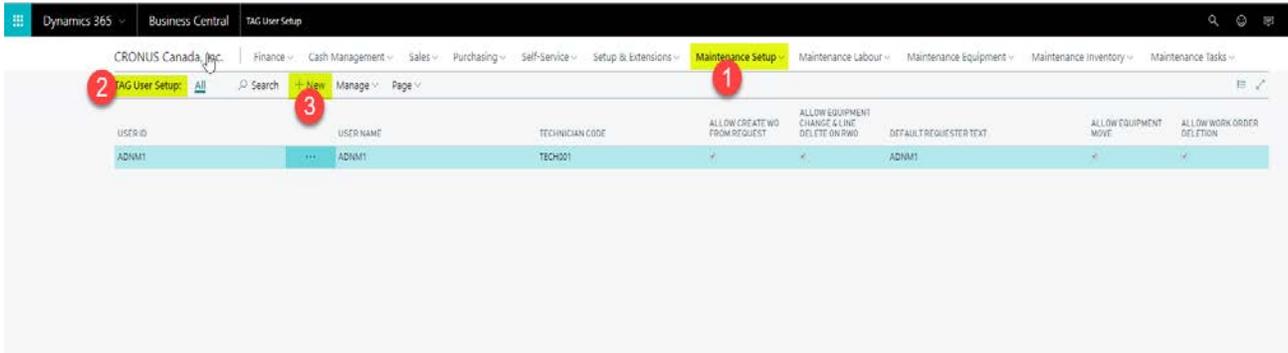
Field	Value
User ID	Select from NAV User ID list
User Name	Enter the user's name
Default requester text	Enter the name to be displayed on requests
Technician code	Enter the technician to be related to this user
Allow Capital Expenditure	Set to yes
Allow standing order	Set to yes
Allow create work order from request	Set to yes
Allow equipment change and line delete on RWO	Set to yes
Allow FWO feedback change	Set to yes
Allow Equipment move	Set to yes
Allow work order deletion	Set to yes

- 6) Close the page to and refresh the list to validate the user setup.

Important Note: each user that will post Tag work order must have a Tag user setup.

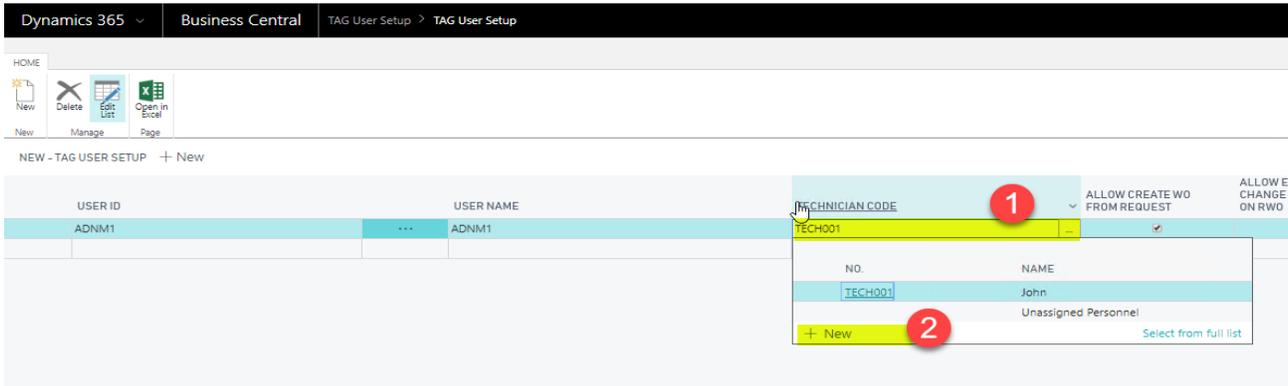
Tag user controls what Tag functions the user is allowed to perform.

The User must exist in the NAV database to be selected as a Tag user.



**Note:**

If desired Technician Code doesn't exist, you can create it also from the Technician code field on the User setup list. Refer to Personnel above for processing.



## TAG Quick start Transactions Guide

### User note:

The following section was copied from the setup guide to provide a quick excerpt on how to perform creation of:

- Create work request
- Create a work order document
- Complete a work order document
- See the result of posting the work order document on equipment
- Reference document: (2.TAG\_Dynamics 365\_Setup User Guide document) for detailed set up

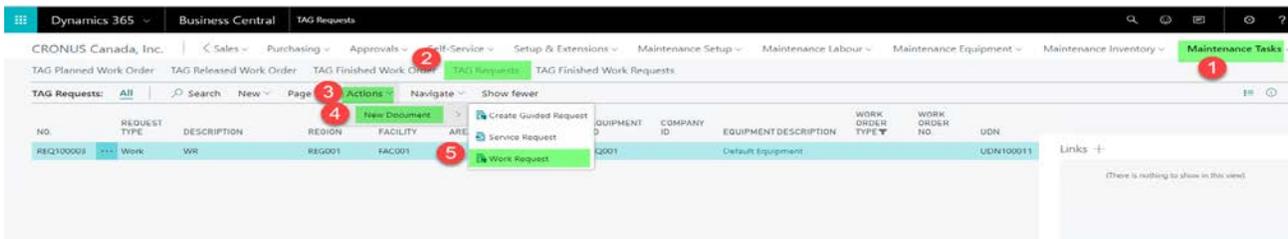
### Create a Work Request:

- Start from Tag **Business Manager Profile**.
- Go to the **Maintenance Tasks** Section, select TAG Request menu, on the **Actions Tab**, select New Document and then **Work Request** to open the **Request Card**.

**Note:** Click **Show All** to get **Actions/Navigate** be opened.

- Enter **Description**, select **equipment** fields.
- Select the appropriate information of request (**Priority, Raison Code, Problem Code...**).
- In the **Action Tab** Click **Create** button, TAG give you the **Request number** and the Uniform Document Number (**UDN**) from this Request.

### Steps:



Dynamics 365 Business Central TAG Requests > TAG Create Work Request

HOME ACTIONS

Test New Create Previous Next

Manage Page

NEW - TAG CREATE WORK REQUEST

## TAG Create Work Request

Description: Work Request

Requester: Requester

Enterprise: --

Region: REG001

Facility: FAC001

Area: --

Line: --

Equipment Group: --

Equipment ID: EQ001

Equipment Description: Default Equipment

Company ID: --

Needed By Date: 5/21/2018

Priority: Critical

Maint. Type: ELECT

Reason Code: --

Problem Code: --

Order Type: PM

Status: --

Work Code: --

Failure Code: --

Document Tracking No.: --

### Create a Work Order from Request:

- Start from Tag **Business Manager** Profile.
- Go to the **Maintenance Tasks** Section, select **TAG Request** menu, select the **Request** that you want to convert to work order and click on the **Card** button under **Home** tab to open the **Request Card**.
- Click **Create Order** button on the **Home** Tab
- Select the appropriate **options** to **create** a work order and click **Ok**.
- TAG give you a **Work order Number** and the **Uniform Document Number (UDN)**.

### Steps:

Dynamics 365 Business Central TAG Requests

CRONUS Canada, Inc. < Sales Purchasing Approvals Sell-Service Setup & Extensions Maintenance Setup Maintenance Labour Maintenance Equipment Maintenance Inventory Maintenance Tasks

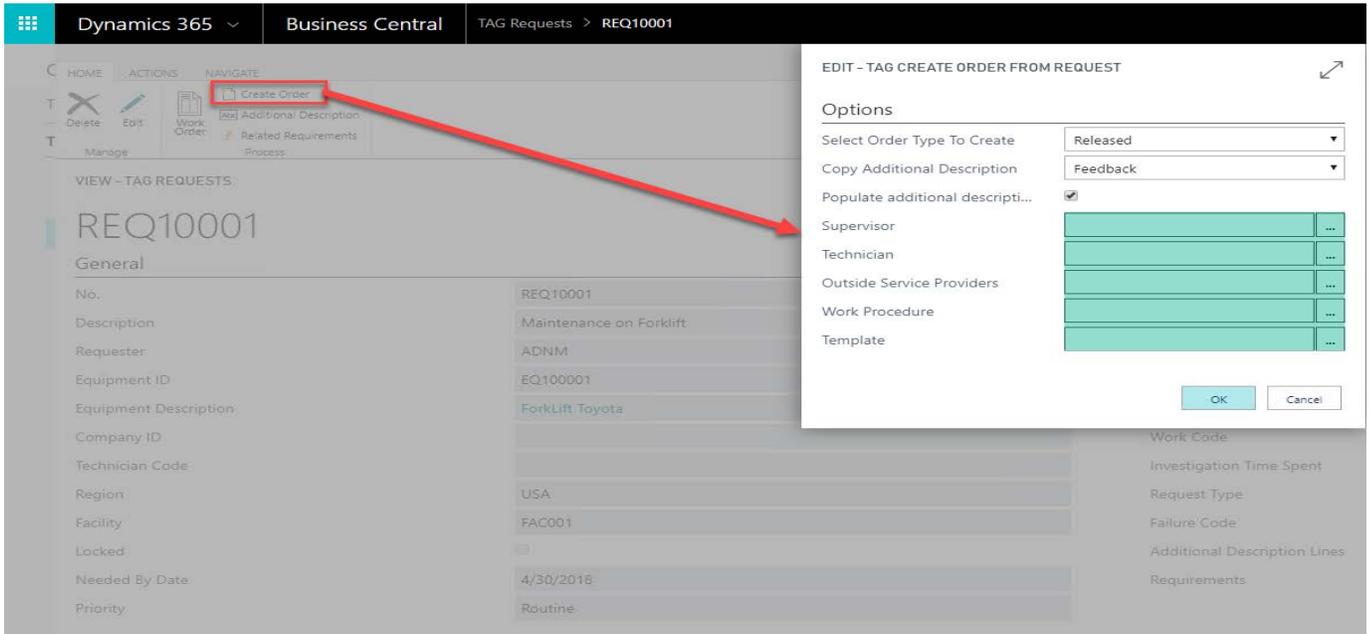
TAG Planned Work Order TAG Released Work Order TAG Finished Work Order TAG Requests TAG Finished Work Requests

TAG Requests: All Search New Page Actions Navigate Show fewer

NO.	REQUEST TYPE	DESCRIPTION	FACILITY	AREA	LINE	EQUIPMENT ID	COMPANY ID	EQUIPMENT DESCRIPTION	WORK ORDER TYPE	WORK ORDER NO.	UDN
REQ100003	Work	WR	REG001	FAC001		EQ001		Default Equipment			UDN100011
REQ100004	Work	Work Request	REG001	FAC001		EQ001		Default Equipment			UDN100012

Links +

(There is nothing to show in this view.)

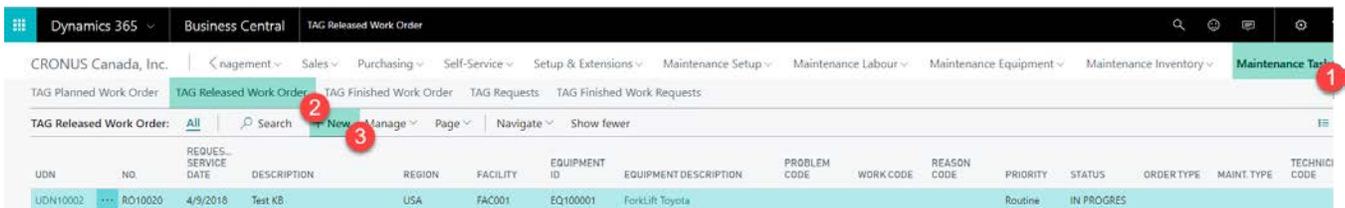


## Create a Manuel Work Order:

- Start from Tag **Business Manager Profile**.
- Go to the **Maintenance Tasks** Section and click on the **Released Work Orders Menu**.
- Click on **New** Button on the ribbon.
- Tab over the **No.** field (or click on the **Description** field) to let TAG assign automatically a **No.**
- Enter the **Description, Equipment ID, Maintenance Type** and other desired fields for this Work Order.
- Open the **Line** Section, either select a **work procedure** or enter the **description** task manually.
- You can also select a predefined **Template** to get the detail of the work order to be completed, go to the **Actions** Tab and click **Template** Button, select the **Template** and click **Update** button to populate this work order.

## Steps:

Access to the Release Work Order Card:



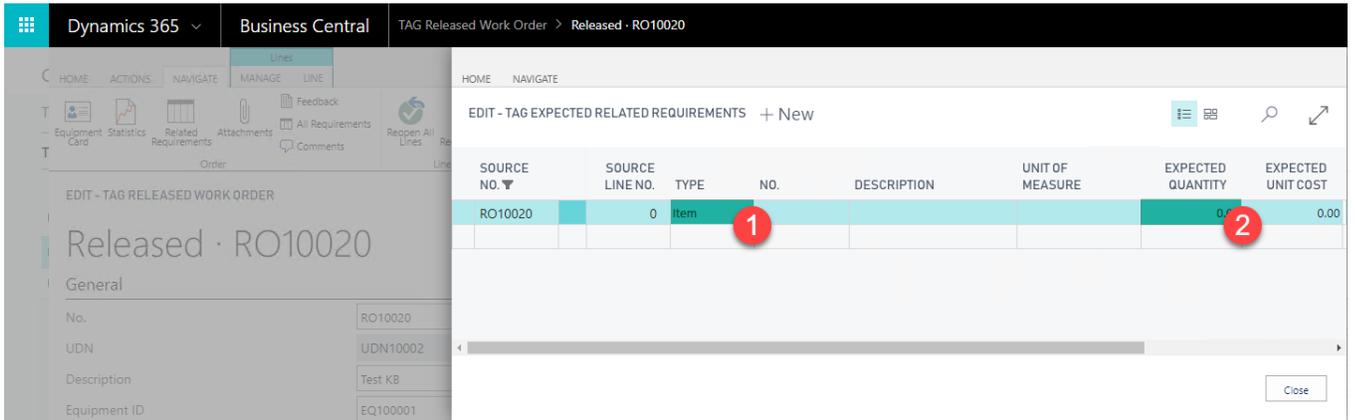
## Create a New Release Work Order:

## Work Order Header and line Related Requirement:

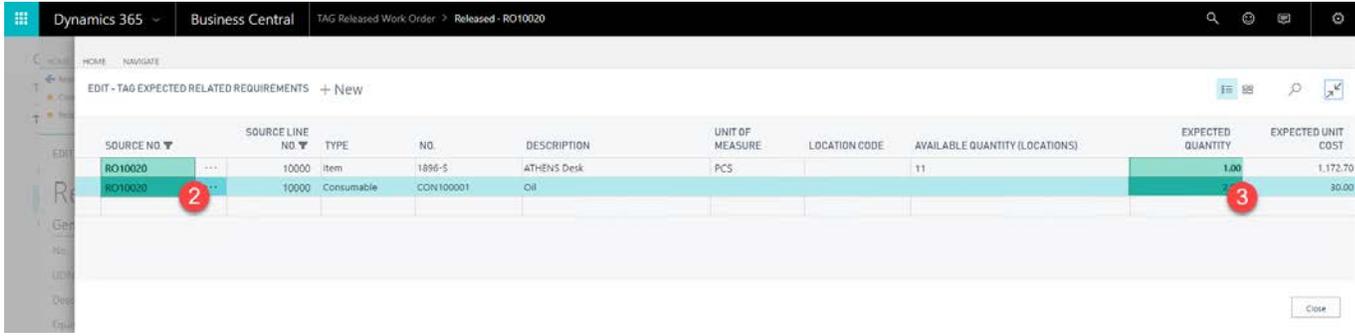
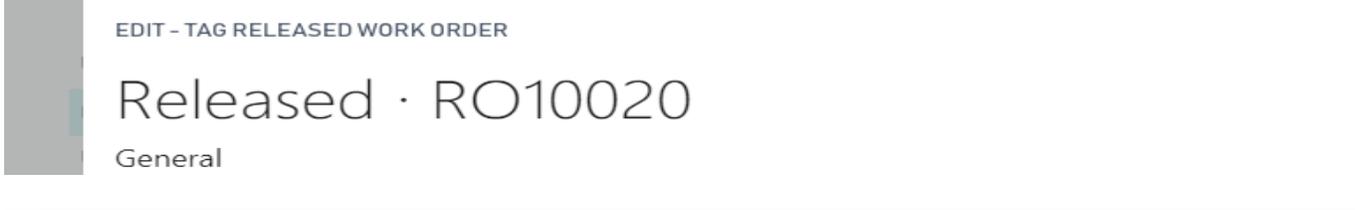
- Start from Tag **Business Manager** Profile.
- Go to the **Maintenance Tasks** Section and click on the **Released Work Order** menu.
- Select the desired work order, click **Manage**, and **Edit** button to open the work order card.
- On **Navigate** Tab, click on the **Related Requirement** button to define the **expected quantity of item, consumable, osp, parts, tool or other for the Work Order header.**
- On the ribbon under **Lines** section Click on the **LINE** and click on the **related requirement** button to define the **expected quantity of item, consumable, osp, parts, tool or other for the selected Work Order line.**

### Steps:

Work Order header Related Requirement:



Work Order line Related Requirement:

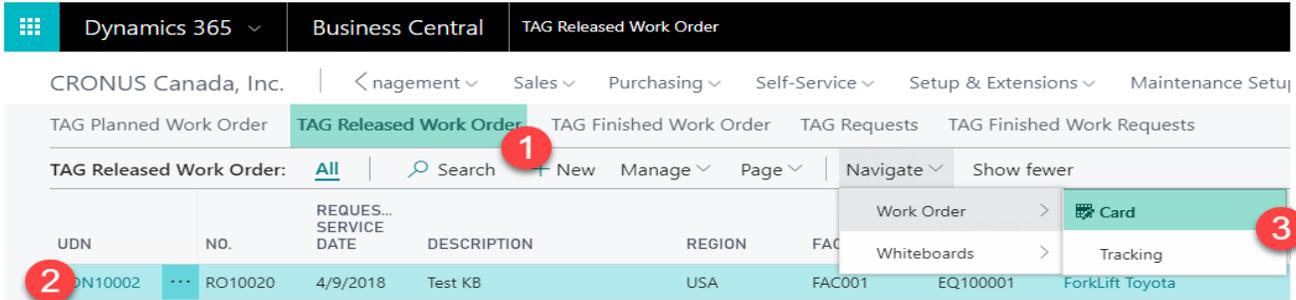


Work Order Complete feature:

- Start from Tag **Business Manager** Profile.
- Go to the **Maintenance Tasks** Section and click on the **Released Work Order** menu.
- Select the **desired work order** and click **Manage/Edit** to open the work order card.
- Enter the **technician** on the scheduled fast tab to assign it for all work order lines or enter it line by line.
- Enter the **actual time** for each work order line (Task).

- On the fact box panel, click **Usage** link to define inventory **actual quantity**.
- On **Navigate** Tab, choose comments or feedback to enter the **work order feedback**.
- On **Navigate** Tab, click on the **Complete** button to complete and close this work order.

**Steps:**

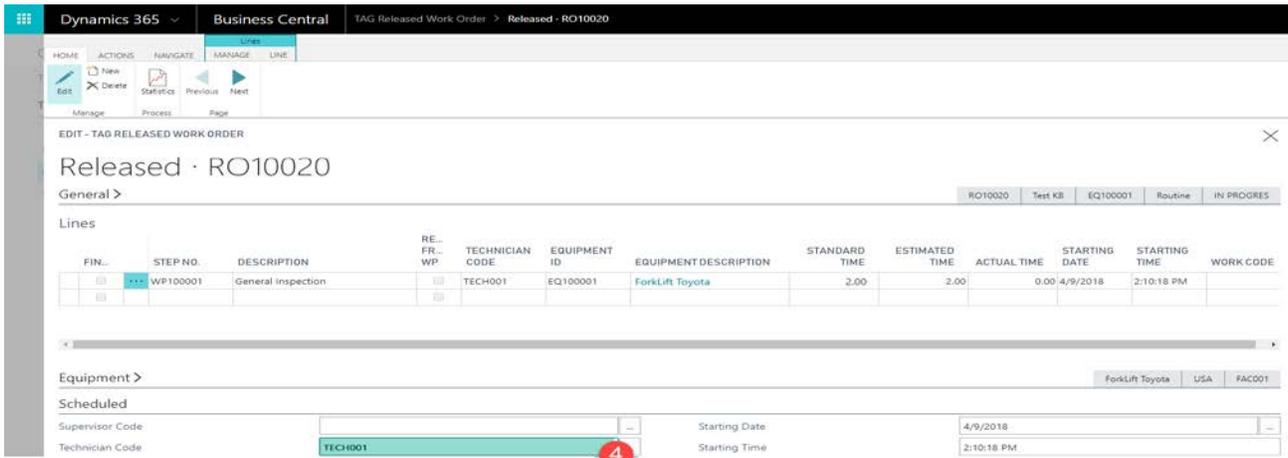


CRONUS Canada, Inc. | < nagement > Sales > Purchasing > Self-Service > Setup & Extensions > Maintenance Setup

TAG Planned Work Order | **TAG Released Work Order** | TAG Finished Work Order | TAG Requests | TAG Finished Work Requests

TAG Released Work Order: All | Search | New | Manage > | Page > | Navigate > | Show fewer

UDN	NO.	REQUES... SERVICE DATE	DESCRIPTION	REGION	FAC	Work Order >	Card
2	ON10002	RO10020	4/9/2018 Test KB	USA	FAC001	EQ100001	3 Tracking ForkLift Toyota



Dynamics 365 | Business Central | TAG Released Work Order > Released · RO10020

HOME ACTIONS NAVIGATE MANAGE LINE

EDIT - TAG RELEASED WORK ORDER

Released · RO10020

General > RO10020 Test KB EQ100001 Routine IN PROGRES

Lines

FIN..	STEP NO.	DESCRIPTION	RE.. FR.. WP	TECHNICIAN CODE	EQUIPMENT ID	EQUIPMENT DESCRIPTION	STANDARD TIME	ESTIMATED TIME	ACTUAL TIME	STARTING DATE	STARTING TIME	WORK CODE
	WP100001	General Inspection		TECH001	EQ100001	ForkLift Toyota	2.00	2.00	0.00	4/9/2018	2:10:18 PM	

Equipment > ForkLift Toyota USA FAC001

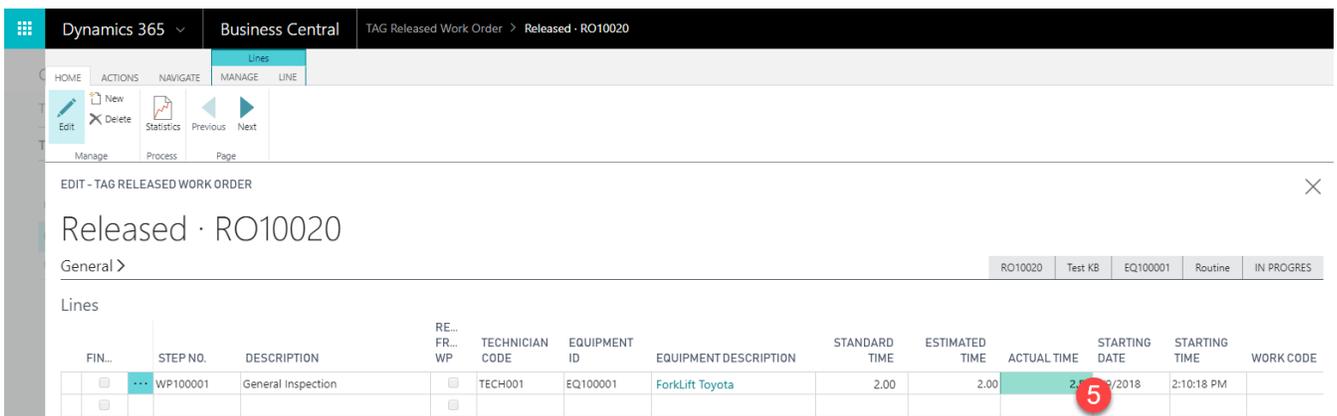
Scheduled

Supervisor Code

Technician Code: **TECH001** (4)

Starting Date: 4/9/2018

Starting Time: 2:10:18 PM



Dynamics 365 | Business Central | TAG Released Work Order > Released · RO10020

HOME ACTIONS NAVIGATE MANAGE LINE

EDIT - TAG RELEASED WORK ORDER

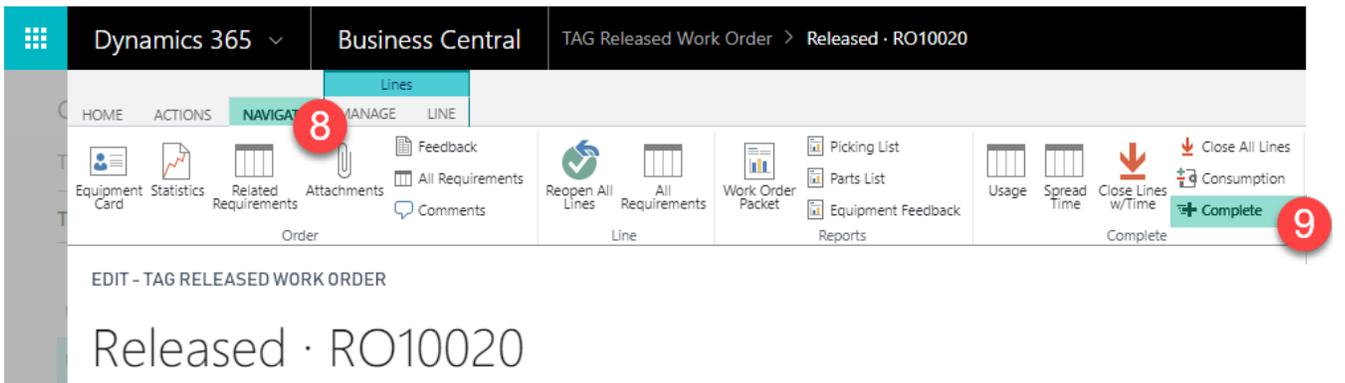
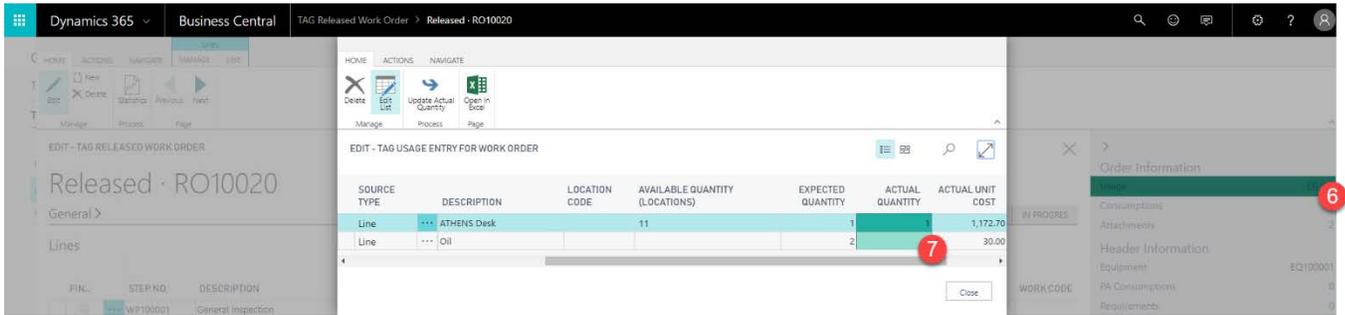
Released · RO10020

General > RO10020 Test KB EQ100001 Routine IN PROGRES

Lines

FIN..	STEP NO.	DESCRIPTION	RE.. FR.. WP	TECHNICIAN CODE	EQUIPMENT ID	EQUIPMENT DESCRIPTION	STANDARD TIME	ESTIMATED TIME	ACTUAL TIME	STARTING DATE	STARTING TIME	WORK CODE
	WP100001	General Inspection		TECH001	EQ100001	ForkLift Toyota	2.00	2.00	2:10:18 PM	4/9/2018	2:10:18 PM	

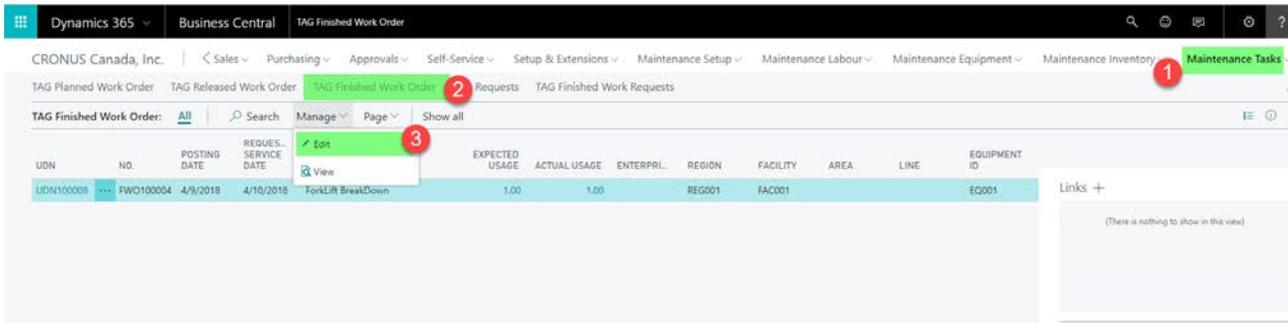
5

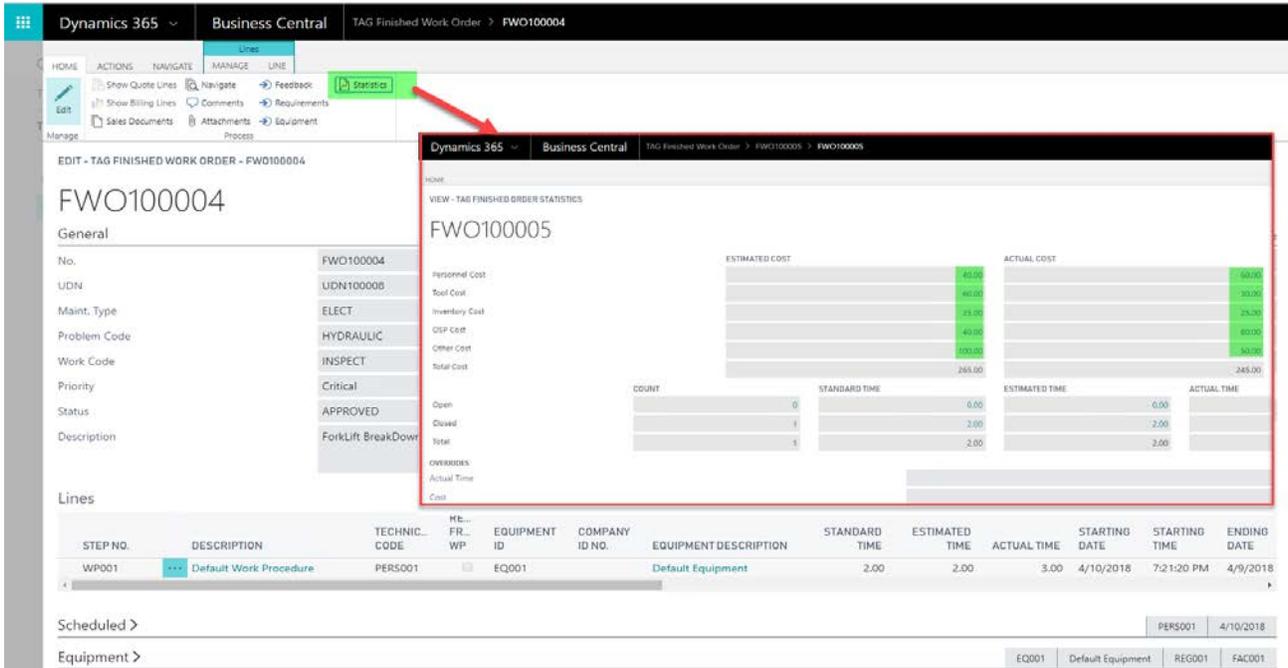


## Reference finished work order statistics

- Start from Tag **Business Manager Profile**.
- Go to the **Maintenance Tasks** Section and click on the **TAG Finished Work Order** menu.
- Select one **Finished Work Order** and click **Manage/Edit** button to open the card.
- On the Home Tab, click on the **statistics** button to open the statistics card.

## Steps:





**Statistics**

**VIEW - TAG FINISHED ORDER STATISTICS**  
FWO100005

	ESTIMATED COST	ACTUAL COST
Personnel Cost	40.00	60.00
Tool Cost	40.00	30.00
Inventory Cost	25.00	25.00
OSP Cost	40.00	80.00
Other Cost	100.00	150.00
<b>Total Cost</b>	<b>245.00</b>	<b>245.00</b>

	STANDARD TIME	ESTIMATED TIME	ACTUAL TIME
Open	0.00	0.00	
Closed	2.00	2.00	2.00
<b>Total</b>	<b>2.00</b>	<b>2.00</b>	<b>2.00</b>

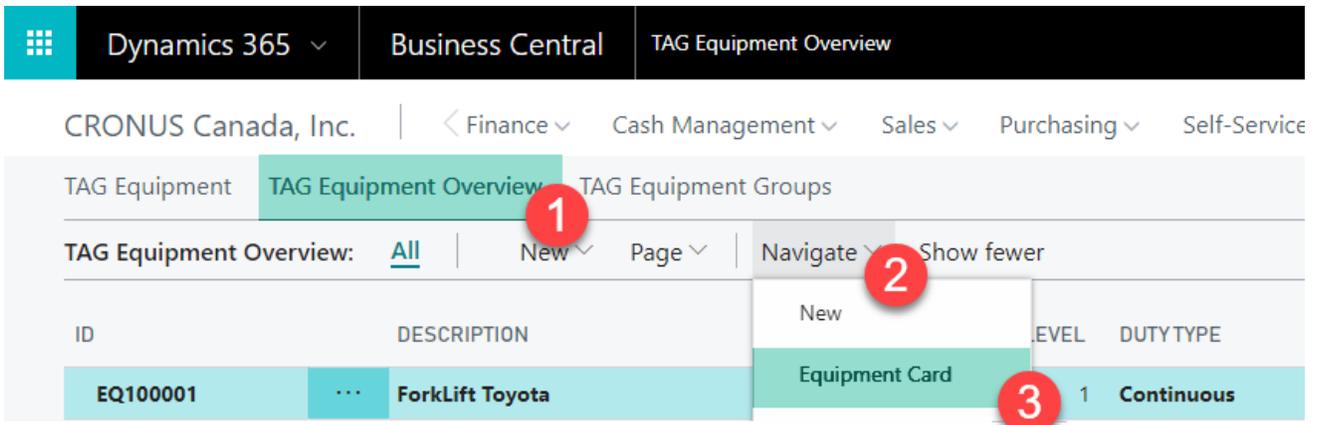
STEP NO.	DESCRIPTION	TECHNIC. CODE	ME... FR... WP	EQUIPMENT ID	COMPANY ID NO.	EQUIPMENT DESCRIPTION	STANDARD TIME	ESTIMATED TIME	ACTUAL TIME	STARTING DATE	STARTING TIME	ENDING DATE
WP001	Default Work Procedure	PERS001		EQ001		Default Equipment	2.00	2.00	3.00	4/10/2018	7:21:20 PM	4/9/2018

## Reference equipment statistics

- Start from Tag **Business Manager** Profile.
- Go to the **Maintenance Equipment** Section and click on the **TAG Equipment Overview** menu.
- Select Equipment and click on the **Equipment card** button to open the equipment card.
- On the Home Tab, click on the **Equipment statistics** button to open the Equipment statistics card.
- Click on the **Equipment Analysis** button to get another equipment statistics like finished work order by work code, statistics maintenance by work code.

### Steps:

Select Equipment:



**TAG Equipment Overview**

TAG Equipment Overview: All | New | Page | Navigate | Show fewer

ID	DESCRIPTION	LEVEL	DUTYTYPE
EQ100001	ForkLift Toyota	1	Continuous

## Open Equipment statistics:

The screenshot shows the 'EDIT - TAG EQUIPMENT CARD - EQ100001' form in Dynamics 365 Business Central. The form is divided into several sections: General, Source, and Reference. The General section includes fields for ID (EQ100001), Address (285,Ed,USA), Description (ForkLift Toyota), Equipment Group (FORKLIFT), Facility (FAC001), Duty Type (Continuous), and Region (USA). The Source section includes Date of Purchase (6/20/2017), Equip. Serial No. (SN147), Purchase Cost (25,000.00), and Install Date (6/20/2017). A table on the left lists equipment items: EQ100001 (ForkLift Toyota), EQ10001, and EQ10002 (Toyota engine).

The screenshot shows the 'VIEW - TAG EQUIPMENT STATISTICS' for EQ100001. It displays a table with columns for 'TOTALS', 'AVERAGE', and 'ACTIVE WORK'. The 'TOTALS' column shows a count of 2 for 'FO Count', with 'Actual Time' at 6.00, 'Standard Time' at 4.00, and 'Estimated Time' at 4.00. The 'AVERAGE' column shows values of 0.00 for 'Actual Time', 'Standard Time', and 'Estimated Time'. The 'ACTIVE WORK' column shows a value of 0.00 for 'Finished Order Costs'. The 'FIRST POSTED FO' and 'LAST POSTED FO' are both 4/30/2018.

## Equipment Analysis:

The screenshot shows the 'TAG Equipment Analysis' for EQ100001. It displays a table with columns for 'COUNT', 'PERCENTAGE', 'STANDARD', and 'ESTIMATED'. The 'COUNT' column shows a value of 2 for 'With' and 2 for 'Without'. The 'PERCENTAGE' column shows values of 0.00, 100.00, and 100.00. The 'STANDARD' column shows values of 0.00, 4.00, and 4.00. The 'ESTIMATED' column shows values of 0.00, 4.00, and 4.00. The 'CONTROL1000000054' is highlighted in green.



## Appendix 1

This section contains all default values for all necessary codes that TAG need as a basic data; these values can be initialized automatically by the system by performing (“Initialize Default values”) action as mentioned before.

### **TAG PLAN NOTE:**

If Tag Plan is set to Express (Free trial) there are restrictions on the following:

- Facility- restricted to 1 – set up for you
- Personnel- restricted to 2 – set up for you
- OSP (Outside Service Provide)- restricted to 1 – set up for you
- Equipment – restricted to 1 – set up for you
- Work procedure – restricted to 1 are set up for you
- Template- restricted to 1
- Date Meter Policies - restricted to 1
- Requests – restricted to 3
- Planned/Released work order – restricted to 3
- Finished work order – restricted to 5

To perform deeper trials or use TAG as a solution; please contact VSD at <https://www.theassetguardian.com/> or by phone at [+1-450-419-5559](tel:+14504195559) and purchase a monthly subscription to Tag. We will provide a key to change Tag Plan, which in turn removes the restrictions.

### **General fast Setup on Tag Controls:**

- 1) Click Edit on the Tag Controls page
- 2) Set the Tag Controls as in the below screenshot  
The following are default general parameters set when a work order is created:  
Requested = 1D  
Start = 1D  
Due By = 10D  
Expiration = 360D
- 3) Set the TAG controls as in the below screenshot  
The following are controls that define how TAG is used and displayed:  
Calculation Method = Hours  
Allow UDN assignment = yes  
Equipment list option = Overview  
Tag Plan Selection = Express (note: Tag Plan is non-editable as this is auto-assigned)



**Note:** Tag Plan Selector is populated automatically to “Express” value when opening the page.

**No Series Fast Tab Setup on Tag Controls:**

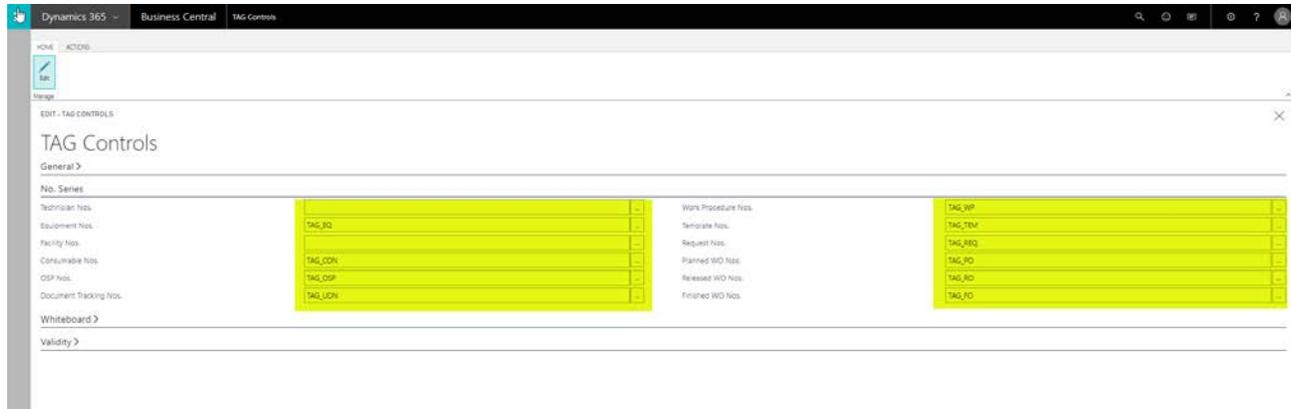
Important Note: it is required that each of the Number Series below are setup. Failure to do so will result in an error when setting the first code for that part of TAG.

**Required No. Series:**

Code:	Tag Description	Prefix	Booleans	Starting No	Last No
Tag-EQ	Equipment	Prefix = EQ	Default = yes, Manual = yes	EQ-00001	EQ-00000
Tag-Cons	Consumable	Prefix = CON	Default = yes, Manual = Yes	Cons-00001	Cons-00000
Tag-Tool	Tool	Prefix = Tool	Default = yes, Manual = yes	Tool-00001	Tool-00000
Tag-UDN	Document tracking	Prefix = UDN	Default = yes, Manual = no	UDN-00001	UDN-00000
Tag-Temp	Template	Prefix = Temp	Default = Yes, Manual = Yes	Temp-00001	Temp-00000
Tag-WP	Work Procedure	Prefix = WP	Default = yes, Manual = yes	WP-00001	WP-00000
Tag-Req	Request	Prefix = Req	Default = yes, Manual = no	Req-00001	Req-00000
Tag-PWO	Planned work order	Prefix = PWO	Default = yes, Manual = no	PWO-00001	PWO-00000
Tag-RWO	Released work order	Prefix = RWO	Default = Yes, Manual = no	RWO-00001	RWO-00000
Tag-FWO	Finished work order	Prefix = FWO	Default = yes, Manual = no	FWO-00001	FWO-00000

The final result of the No series fast tab set-up will be as shown in the screenshot directly below. It is assumed that the user has knowledge of usage and how to set up standard NAV No. Series. Tag instructions provide the specific setups for each.

**Note:** Technician and Facility number series will be blank, this means that the numbering will be manual and not auto assigned.



#### Steps to set each No. Series:

- 1) Open No series fast tab on Control Page
- 2) Click on the 'assist' button (with the ...) to open the No Series list
- 3) Click on 'select from the full list' on the No series list.
- 4) Select 'New' from the No Series list
- 5) Create each No Series Code using the suggested Code, description, default value, Manual value, Prefix with starting no and last no; as in the table above.
- 9) Once the code is created, use the lines button to assign the starting no and last no.

Dynamics 365 Business Central TAG Controls

HOME ACTIONS

 Edit

Manage

EDIT - TAG CONTROLS

## TAG Controls

General >

No. Series

Technician Nos.

Equipment Nos. TAG\_EQ 1

Facility Nos.

Consumable Nos.

OSP Nos.

Document Tracking Nos.

Whiteboard >

Validity >

CODE	DESCRIPTION
S-REM	Reminder
S-REM+	Issued Reminder
S-RETORD	Sales Return Order
S-SHPT	Sales Shipment
TAG_CON	TAG CONS
TAG_EQ	TAG_EQ

+ New 2 Select from full list

Dynamics 365 Business Central TAG Controls

HOME ACTIONS

 Edit

Manage

EDIT - TAG CONTROLS

## TAG Controls

General >

No. Series

Technician Nos.

Equipment Nos. TAG\_EQ

Facility Nos.

Consumable Nos. TAG\_CON

OSP Nos. TAG\_OSP

Document Tracking Nos. TAG\_UDN

Whiteboard >

Validity >

HOME NAVIGATE

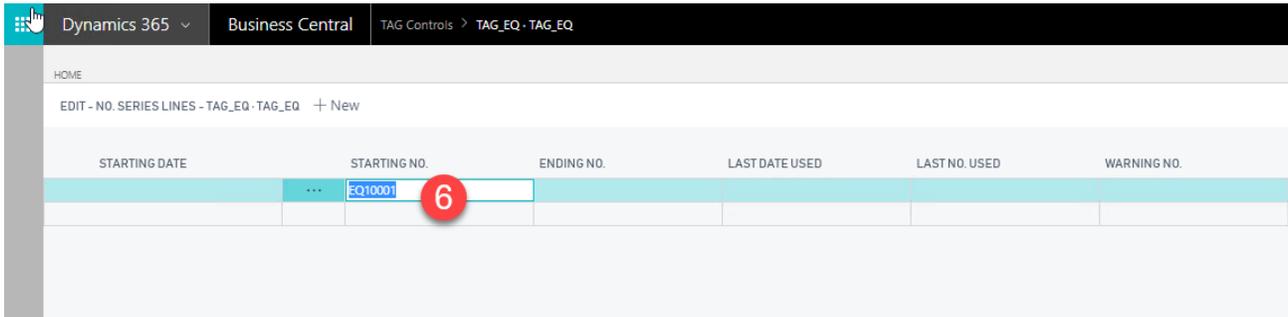
 1     

Manage Navigate Page

SELECT - NO. SERIES LIST + New

CODE	DESCRIPTION	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	DEF. NOS.	MA. NOS.	DATE DR...
S-CR+	Posted Sales Credit Memo	PS-CR104001	PS-CR105999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SEGM	Segment	SM00001	SM99999			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-FIN	Finance Charge Memo	S-FIN1001	S-FIN2999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-FIN+	Issued Finance Charge Memo	S-FIN106001	S-FIN107999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-INV	Sales Invoice	S-INV102001	S-INV103999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-INV+	Posted Sales Invoice	PS-INV103001	PS-INV104999	1/26/2018		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SN1	SN Numbering	SN00001	SN99999			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SN2	SN Numbering	XYZ00001	XYZ99999			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
S-ORD	Sales Order	S-ORD101001	S-ORD102999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-QUO	Sales Quote	S-QUO1001	S-QUO2999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-REM	Reminder	S-REM1001	S-REM2999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-REM+	Issued Reminder	S-REM105001	S-REM106999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-RETORD	Sales Return Order	S-RETORD1001	S-RETORD2999			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
S-SHPT	Sales Shipment	S-SHPT102001	S-SHPT103999	1/26/2018		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TAG_CON	TAG CONS	CON10001				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TAG_EQ	TAG_EQ	EQ10001				<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2 3 4 5

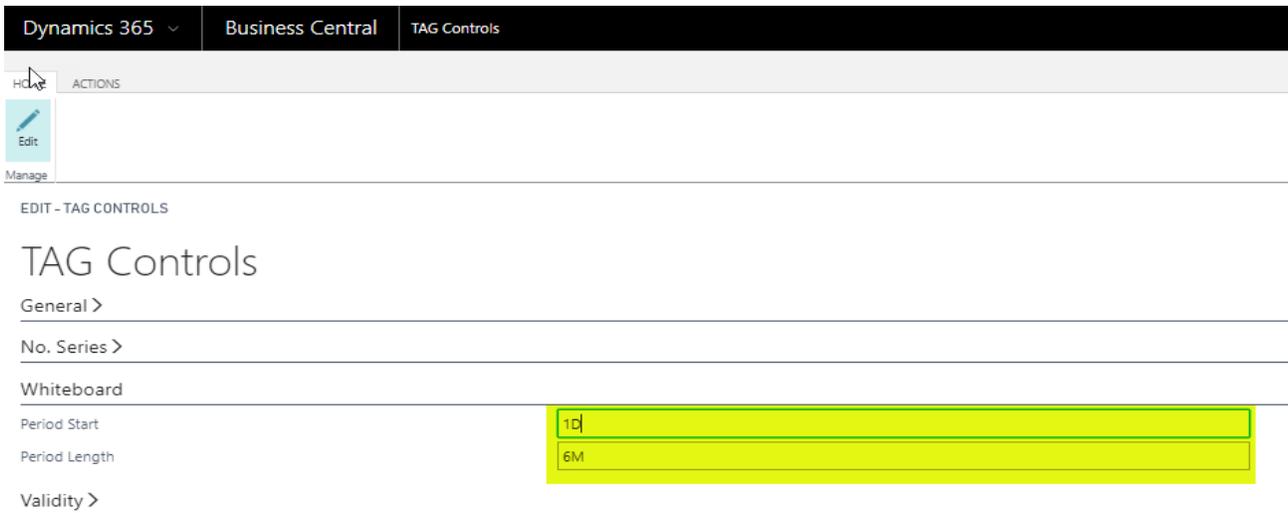


STARTING DATE	STARTING NO.	ENDING NO.	LAST DATE USED	LAST NO. USED	WARNING NO.
	EQ1000				

Follow the same steps to setup the rest of No series values.

### Whiteboard Fast Tab Setup on Tag Controls:

- Click on the whiteboard fast tab for the controls page
- Set the default values to be used by the Whiteboards:  
 Period start = '-1W'  
 Period length = '1Y'



EDIT - TAG CONTROLS

## TAG Controls

General >

No. Series >

Whiteboard

Period Start: 1d

Period Length: 6M

Validity >

### Validity Setup on Tag Controls:

- Click on the Validity fast tab for the controls page
- Set the values to be use by Tag to determine default requirements  
 Require items = no  
 Require supervisor on order = no  
 Require technician on line = yes  
 Require Tech / Vendor on order = yes  
 Require equipment on order = yes  
 Require equipment on line = yes  
 Default labour rate = 50

Dynamics 365 Business Central TAG Controls

HOME ACTIONS

Manage

EDIT - TAG CONTROLS

TAG Controls

General >

No. Series >

Whiteboard >

Validity

Require Items	<input type="checkbox"/>	Require Equipment on Order	<input checked="" type="checkbox"/>
Require Supervisor on Order	<input type="checkbox"/>	Require Equipment on Line	<input checked="" type="checkbox"/>
Require Technician on Line	<input checked="" type="checkbox"/>	INVENTORY FILTERS	
Require Tech/Vendor on Order	<input checked="" type="checkbox"/>	Default Labor Rate	<input type="text"/>

Close the Tag Controls Page.

### Maintenance Setup Navigation pane:

How to get there:

Click on the “Maintenance Setup” Navigation to open the Maintenance Setup Menu

Under ‘Maintenance Set-up’ the user will see a number of lists, one for each code that must be set-up in Tag.

General instructions on how to set up the codes:

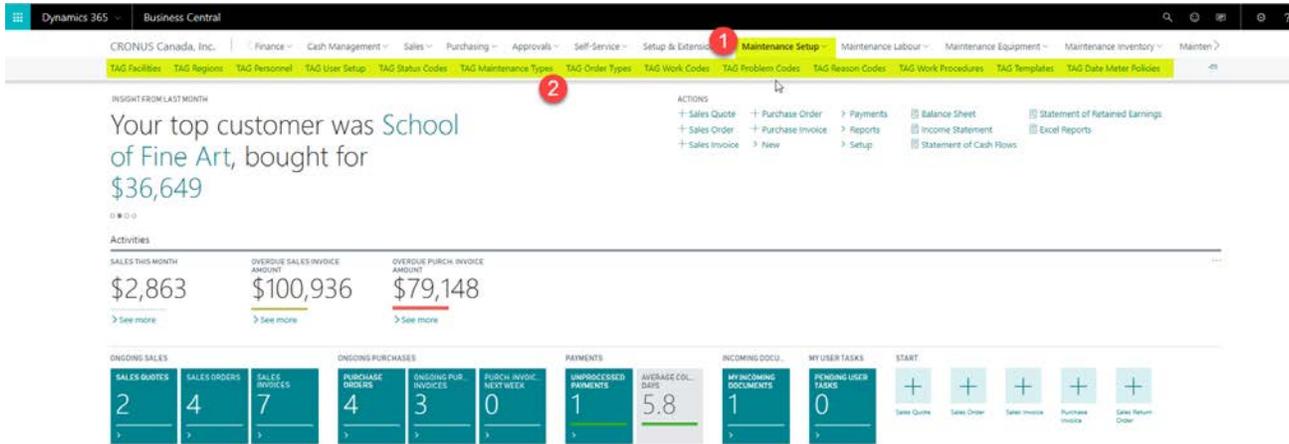
- Select the list
- Select ‘new’ on the action bar
  - o Some codes will open a card to fill in the values
  - o Some codes will allow edit to the list to fill in the values
- Create the code, with description, and fill in the required values

Note: at least one code value is required for each

Required Codes and purpose:

- Facility, region → these codes define the location of the equipment
- Personnel → this code defines the technicians that will be assigned to work tasks
- Status, Maintenance type, order type, work code, problem code, reason code → these codes help define the work order header for filtering and actions.
- Work procedure, templates → these are tools used by the user to quickly populate work order header and lines with pre-defined values
- User Set-up → this list defines how each user can work with TAG functionality. Note: A Tag user must exist in order to post a work order.

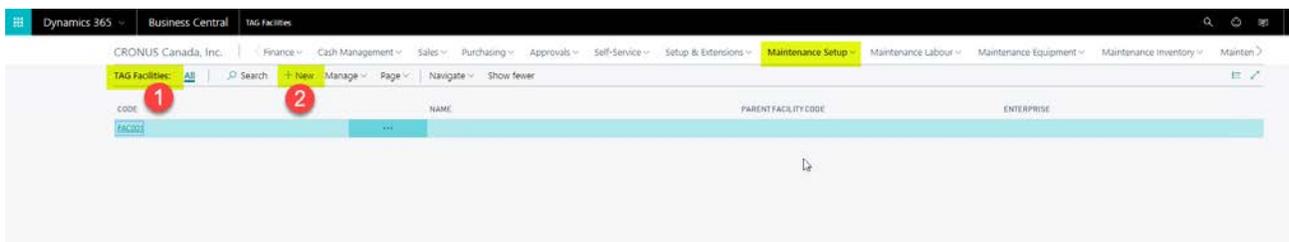
## “Maintenance Setup” Menu:

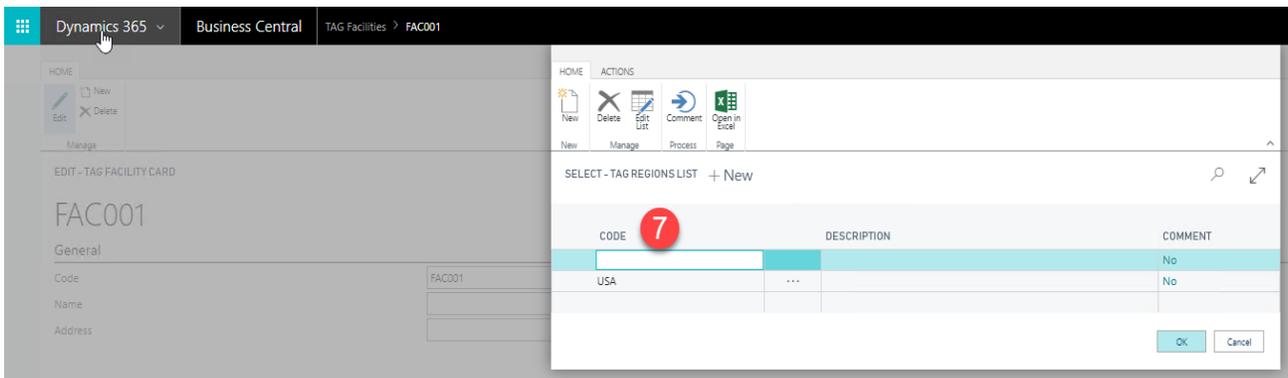
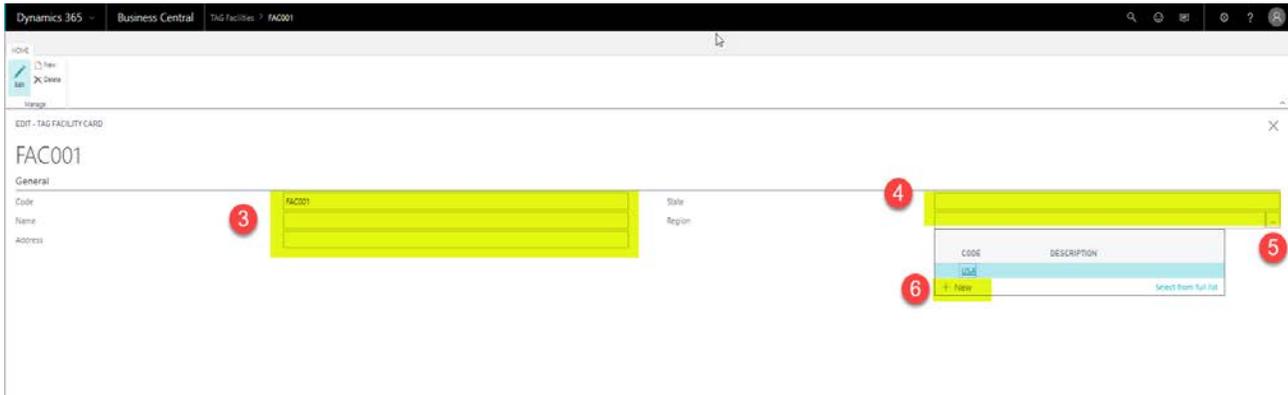


### Maintenance Setup >TAG Facilities

The following steps allows you to create a new facility:

- 1) Under the maintenance setup Navigation pane button, click on ‘facilities’ to open the list of existing facilities
- 2) Click on the new button on the ribbon to create a new facility
- 3) Manually type the desired code (No Number Series is used here)
- 4) Type the Name, address and Region fields
- 5) If the Region doesn’t exist, you can create it from the region field on the Facilities record
- 6) Close the page and refresh the list to validate the facility creation.

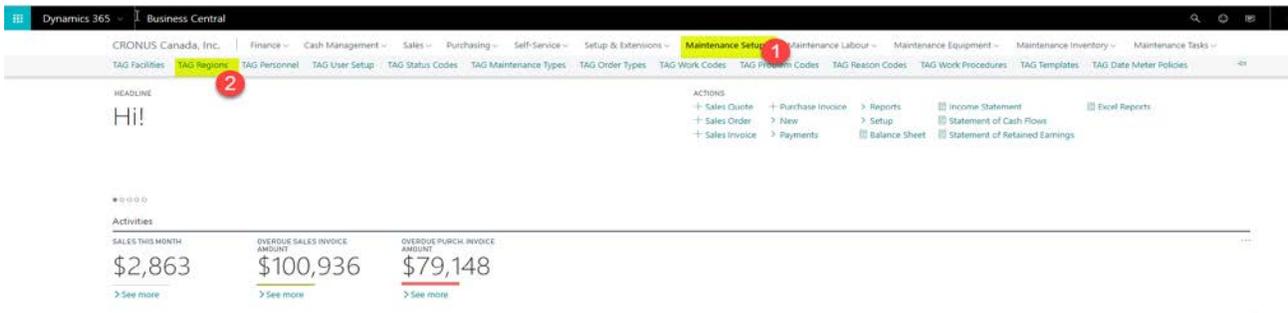


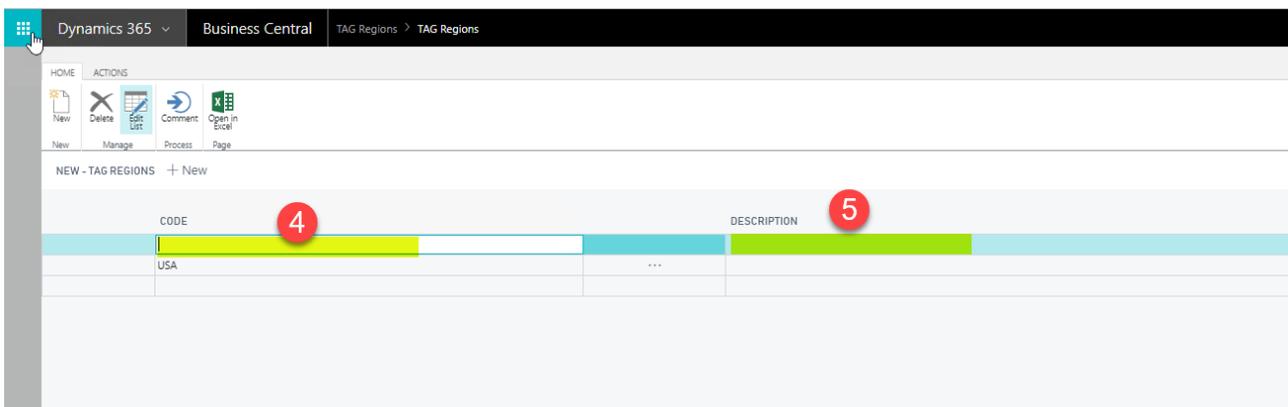
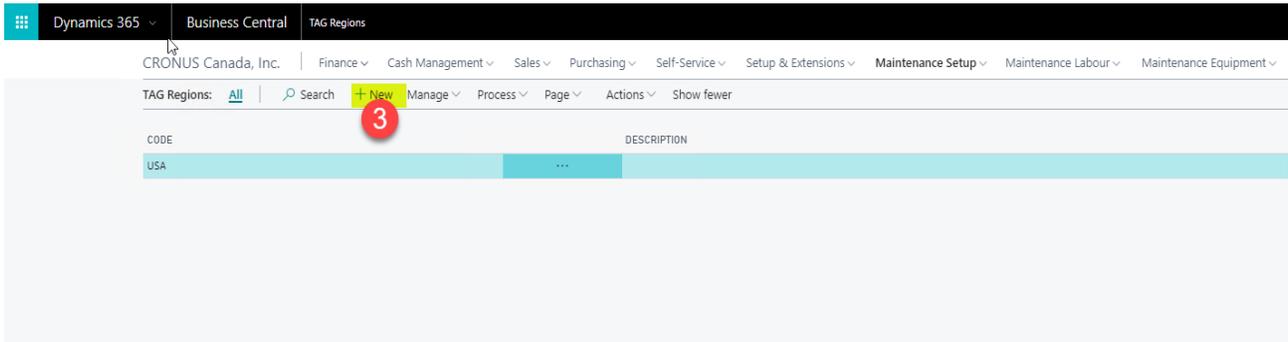


## Maintenance Setup > TAG Region:

Create a new Region:

- Under the maintenance setup Navigation pane button, click on the Region to open the list of existing Region.
- Click on the new button on the ribbon to create a new Region.
  - o Add a code with description
- Close the page and refresh the list to validate.

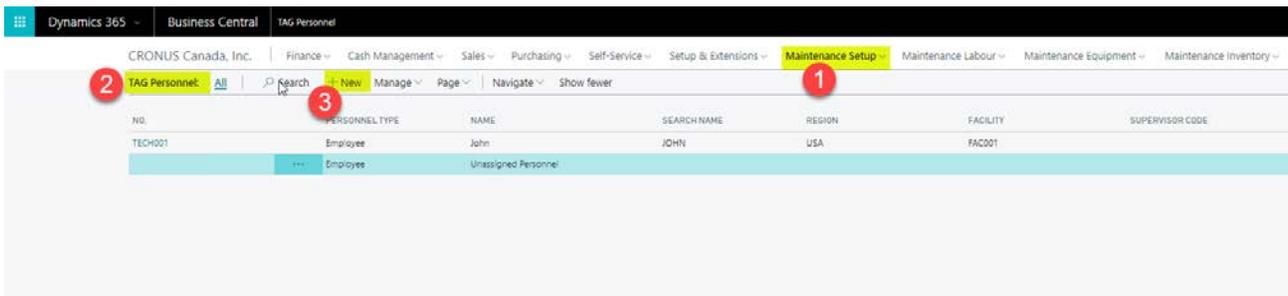




## Maintenance Setup > TAG Personnel:

Create a new technician or supervisor:

- In the maintenance setup Menu, click on the Personnel to open the list of Personnel existing.
- Click on the new button on the ribbon to create a new technician.
- Tape manually the desired No.
- Tape the Name, Region, Facility, and Fields.
- In the Personnel Data, tape the desired fields.
- In the cost fast tab, enter the “Per hour cost override” field.
- Close the page and refresh the list to validate the personnel creation.



NEW - TAG PERSONNEL CARD

### TAG Personnel Card

**General**

No.

Name  4

Region

Facility

Personnel Type

Supervisor Code

Search Name

Blocked

Last Date Modified

**Personal Data**

Title

Address  5

Address 2

City

State Code

ZIP Code

Country Code

Reference No.

Personnel Cost Override  6

## Maintenance Setup > TAG Status Codes:

Create a new Status :

- 1) In the **maintenance setup** Menu, click on the **Status Codes** to open the status Codes list:
- 2) Click on the **new** button on the ribbon to create a new status.
- 3) Enter the **Status code**, **Description** and **Style Code** fields:
- 4) Close the page and refresh list to validate.

CRONUS Canada, Inc. | Finance | Cash Management | Sales | Purchasing | Self-Service | Setup & Extensions | **Maintenance Setup** | Maintenance Labour | Maintenance Equipment

TAG Status Codes: All | Search | **+ New** | Manage | Page

STATUS CODE	DESCRIPTION	STYLE CODE
NEW	New WO	Standard
IN PROGRES	In Progres	Standard
APPROVED	Approved	Standard

NEW - TAG STATUS CODES | + New

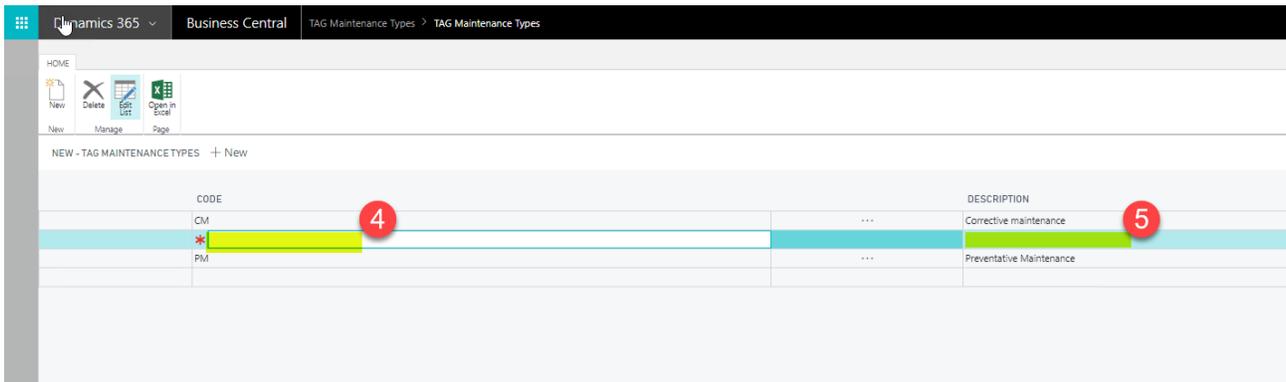
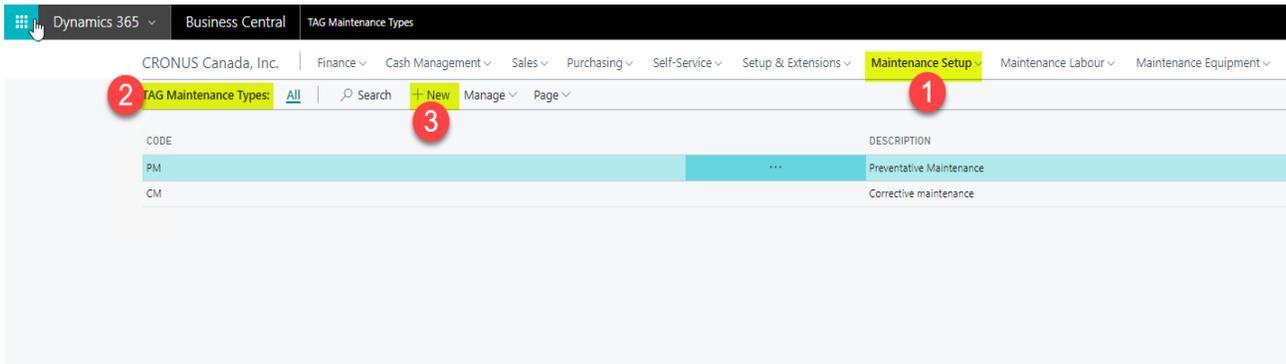
STATUS CODE	DESCRIPTION	STYLE CODE
APPROVED	Approved	Standard
IN PROGRES	In Progres	Standard
NEW	New WO	Standard
<b>COMPLETED</b> <span>1</span>	<b>Completed</b> <span>2</span>	<b>Standard</b> <span>3</span>

Style Code dropdown options: Standard, Blue, Bold, Blue + Bold, Red + Italic, Blue + Italic, Bold + Green, Bold + Italic + Red, Yellow, Grey

## Maintenance Setup > TAG Maintenance types:

Create a new maintenance type:

- 1) In the **maintenance setup** Menu, click on the **Maintenance Types** to open the maintenance types list:
- 2) Click on the **new** button on the ribbon to create a new maintenance types.
- 3) Enter the Code and Description fields:
- 4) Close the page and refresh list to validate.



## Maintenance Setup > TAG Order Types

Create a new order type :

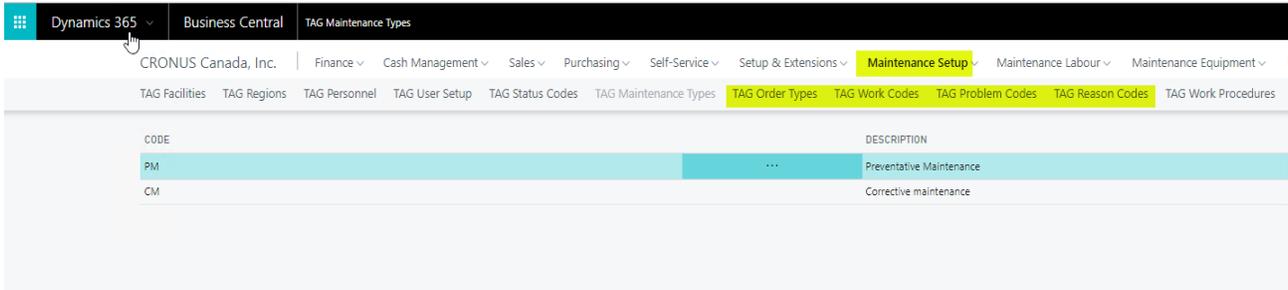
- 1) In the **maintenance setup** Menu, click on the **order Types** to open the order types list:
- 2) Click on the **new** button on the ribbon to create a new order type.
- 3) Enter the Code and Description fields.
- 4) Close the page and refresh list to validate.

Follow the same process to create the rest of Maintenances Codes:

**TAG Work Codes**

**TAG Problem Codes**

**TAG Reason Codes**

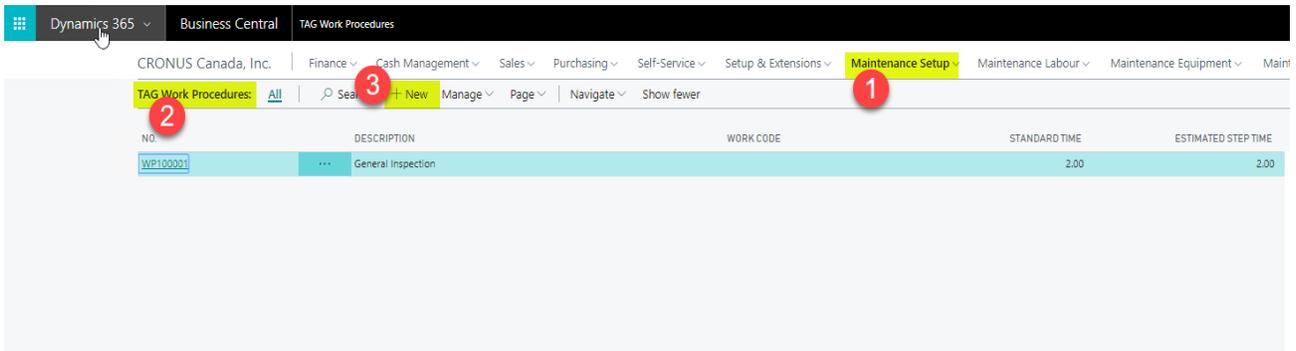


## Maintenance Setup > TAG Work procedure:

The following steps allow you to create a new work procedure:

- 1) In the **maintenance setup** Menu, click on the **Work Procedure** to open the **work procedure** list:
- 2) Click on the **new** button on the ribbon to create a new **work procedure**:
- 3) On the general fast tab, enter **No**, **Description**, **Standard time**, **Estimated step time** and **work code** fields:
- 4) On the Navigate tab click on the Related Requirements button to enter Work Procedure Related requirements:
- 5) Select the Related Requirement type (**Item, Consumable, OSP, Other or Parts**) :
- 6) Click on the No. field to open the Related Requirement list (Item):
- 7) Click Ok to select the item and validate.
- 8) Select the expected quantity that is expected to be used of the item.

Note: Other types of related requirement may be set for the work order task by selecting the type and no. on a new line (Consumable, Resource, Tool, OSP, Others and Parts).



Dynamics 365 - Business Central TAG Work Procedures > WP100001

HOME NAVIGATE

EDIT - TAG WORK PROCEDURES CARD

WP100001

General

CONTROL0000000003

No. WP100001

Description General Inspection

Standard Time 2.00

Estimated Step Time 2.00

CONTROL0000000004

Work Code

Dynamics 365 - Business Central TAG Work Procedures > WP001

HOME ACTIONS NAVIGATE

Sub-Step Card Name History Required Quantities Comment

Sub-Steps List Status Attachments

Test Results Related Requirements Day Procedure

EDIT - TAG WORK PROCEDURES CARD

WP001

General

No. WP001

Description Default Work Procedure

Standard Time 2.00

Estimated Step Time 2.00

Requirements 0

Quantities 0

Attachments 0

Work Code

Keep Work Code

Equipment Group

Planned Work Orders

Released Work Orders

Finished Work Orders

Assigned Templates

Assigned Date Meters

Creation Date

Last Date Modified

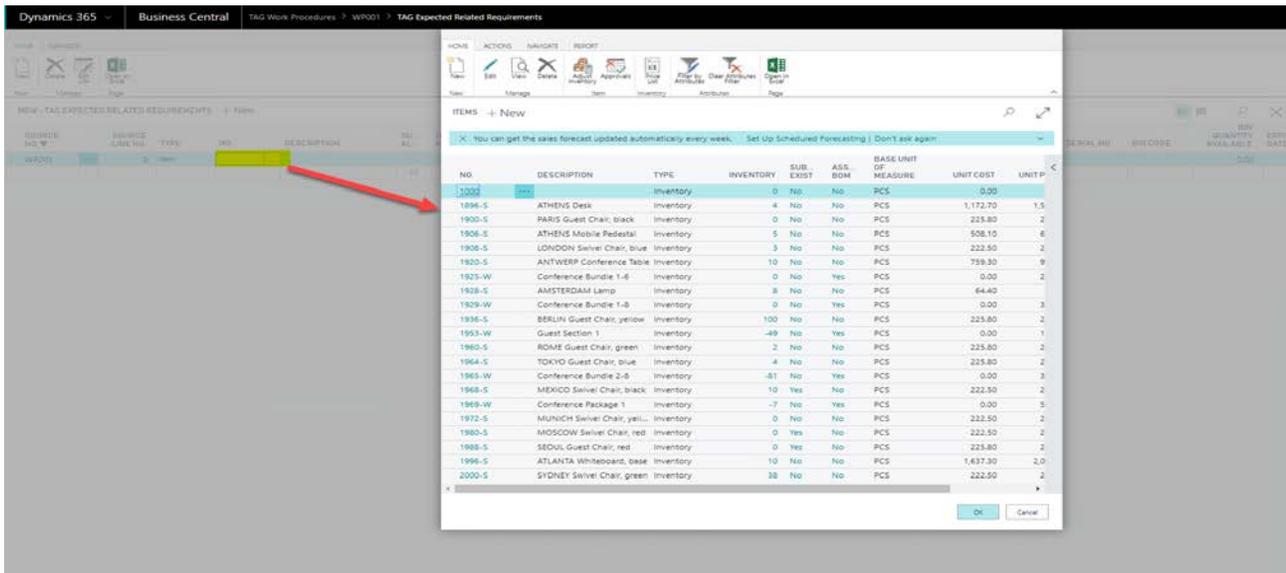
Dynamics 365 - Business Central TAG Work Procedures > WP001 > TAG Expected Related Requirements

HOME NAVIGATE

NEW - TAG EXPECTED RELATED REQUIREMENTS + New

SOURCE NO.	SOURCE LINE NO.	TYPE	NO.	DESCRIPTION	SU. AL.	UNIT OF MEASURE	VARIANT CODE	LOCATION CODE	AVAILABLE QUANTITY (LOCATIONS)	EXPECTED QUANTITY	EXPECTED UNIT COST	RE. CO.	GEN. PROD. POSTING GROUP	LOT NO.	SERIAL NO.	BIN CODE	BIN QUANTITY AVAILABLE	EXPIRA. DATE
WP001		Item								0.00	0.00						0.00	

Item dropdown menu: Item, Consumable, Top, OSP, Other, Parts, Resource



## Maintenance Labour Navigation pane:

How to get there:

Click on the “Maintenance Labour” Navigation Pane to open the Maintenance Setup Menu  
Under ‘Maintenance Labour’ the user will see a number of lists, one for each code that must be set-up in Tag.

General instructions on how to set up the codes:

- Select the list
- Select ‘new’ on the action bar
  - o Some codes will open a card to fill in the values
  - o Some codes will allow edit to the list to fill in the values
- Create the code, with description, and fill in the required values

Note: at least one code value is required for each

Required Codes and purpose:

- Personnel → this code defines the technicians that will be assigned to work tasks
- OSP → this code defines OSP – Outside Service Providers or Vendors that may perform work order tasks.

The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'Maintenance Labour' (highlighted with a red circle 1). Below it, the 'TAG Outside Service Provider' menu item is highlighted with a red circle 2. The main content area displays 'INSIGHT FROM LAST MONTH' with the text 'The best-selling item was ATHENS Desk with 18 units sold'. Below this, there are three activity cards: 'SALES THIS MONTH' with a value of \$2,863, 'OVERDUE SALES INVOICE AMOUNT' with a value of \$100,936, and 'OVERDUE PURCH. INVOICE AMOUNT' with a value of \$79,148. A 'Maintenance Labour' ribbon is also visible at the top right of the main content area.

## Maintenance Labour > Outside Service Provider (OSP):

Create a new Outside Service Provider (OSP):

- 1) In the **maintenance labour** Menu, click on the Outside Service Provider to open the **Outside Service Provider list**.
- 2) Click on the **new** button on the ribbon to create a new **Outside Service Provider**.
- 3) In the General fast tab, Tab over the No. Field (or click on the Name field) to let TAG assign automatically a No or tape manually the desired no.
- 4) Enter the Name and the address fields.
- 5) In the Cost Fast Tab, enter the Charge type to hourly and Hourly Rate fields.
- 6) Close the page and refresh to validate the list.

The screenshot shows the 'TAG Outside Service Provider' list view in Dynamics 365 Business Central. The 'Maintenance Labour' ribbon is active, and the 'New' button is highlighted with a red circle 1. The 'TAG Outside Service Provider' menu item is highlighted with a red circle 2. The list view shows a table with columns: NO., NAME, CITY, STATE, ZIP CODE, PHONE NO., and SEARCH NAME. A single record is visible with the name 'Default Outside Service Provider' and a 'No.' field containing '02900'. The 'New' button is also highlighted with a red circle 3.

Dynamics 365 Business Central TAG Outside Service Provider OSP001

HOME NAVIGATE

EDIT - TAG OUTSIDE SERVICE PROVIDER CARD

OSP001

General

No.  ADDRESS

Name

Cost

Charge Type

Hourly Rate

## Maintenance Equipment Navigation pane:

How to get there:

Click on the “Maintenance Equipment” Navigation to open the Maintenance Equipment Menu

Under ‘Maintenance Equipment the user will see a number of lists, one for each code that must be set-up in Tag.

General instructions on how to set up the codes:

- Select the list
- Select ‘new’ on the action bar
  - o Some codes will open a card to fill in the values
  - o Some codes will allow edit to the list to fill in the values
- Create the code, with description, and fill in the required values

Note: at least one code value is required for each

Dynamics 365 Business Central

CRONUS Canada, Inc. Finance Cash Management Sales Purchasing Self-Service Setup & Extensions Maintenance Setup Maintenance Labour **Maintenance Equipment** Maintenance Inventory Maintenance Tasks

TAG Equipment TAG Equipment Overview TAG Equipment Groups

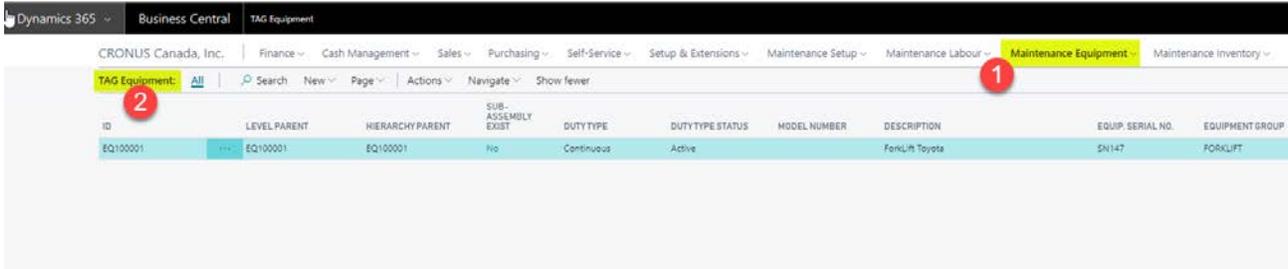
INSIGHT FROM LAST MONTH

The best-selling item was  
ATHENS Desk with 18 units  
sold

ACTIONS

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Invoice
- > New
- > Payments
- > Reports
- > Setup
- > Balance Sheet
- > Income Statement
- > Statement of Cash Flows
- > Statement of Retained Earnings
- > Excel Reports

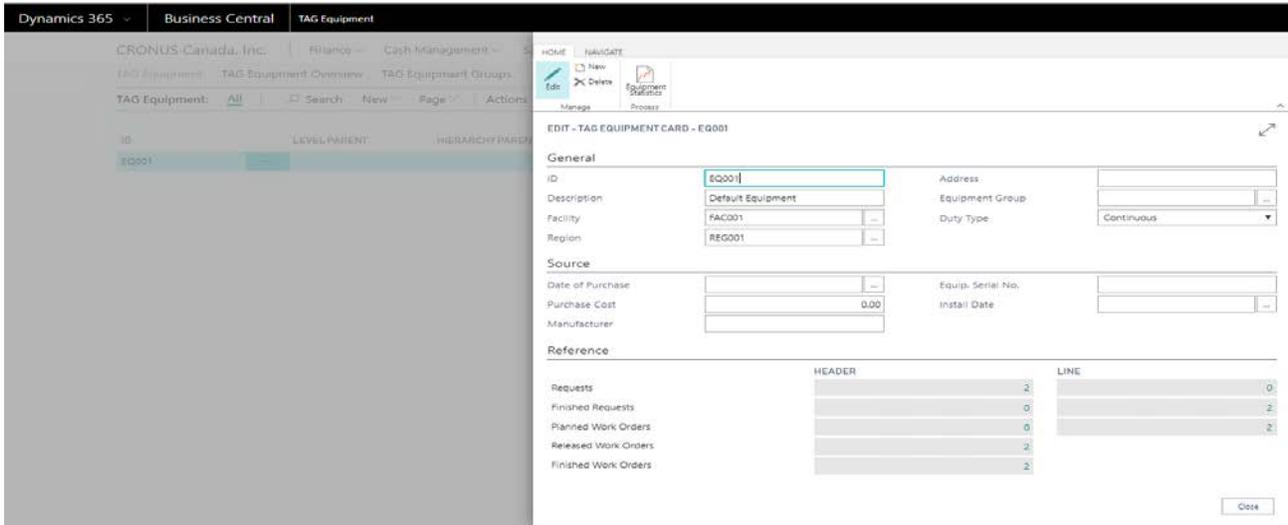
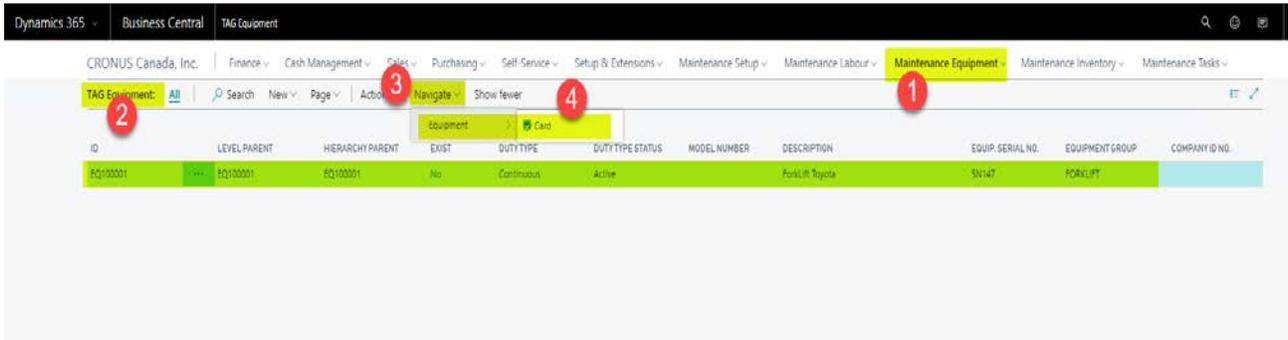
Activities



## Maintenance Equipment > TAG Equipment:

This section allows you to consult the details of each equipment in this list, choose the desired equipment and click on Card button to open the equipment's card:

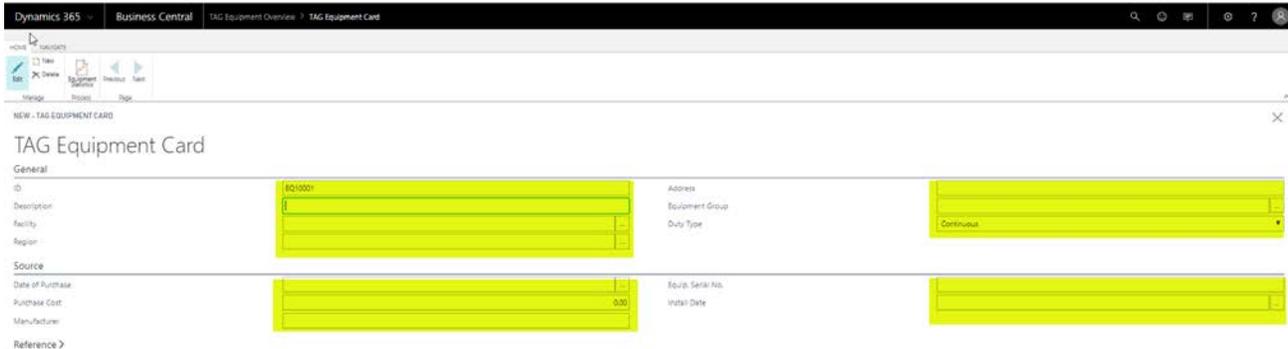
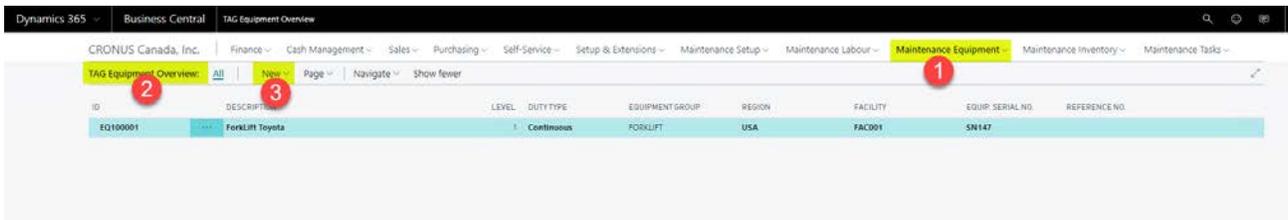
Note, a new equipment may be created from the Equipment overview list.



### Maintenance Equipment > TAG Equipment Overview:

Create a new Equipment:

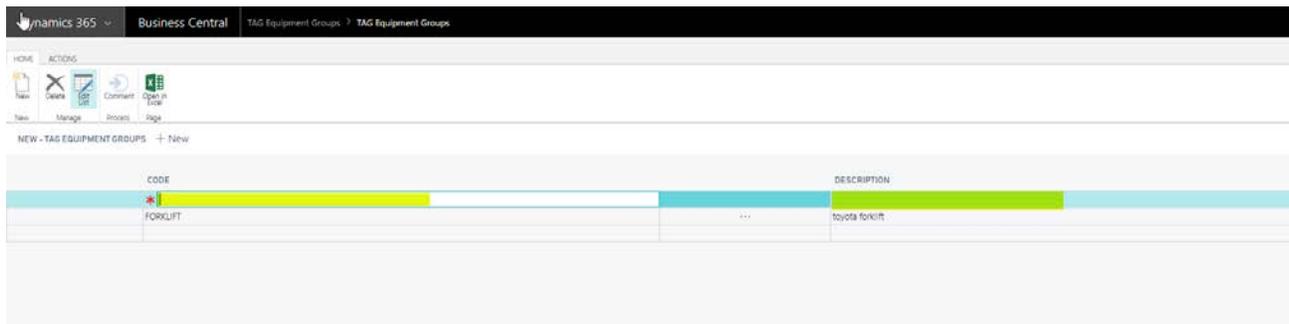
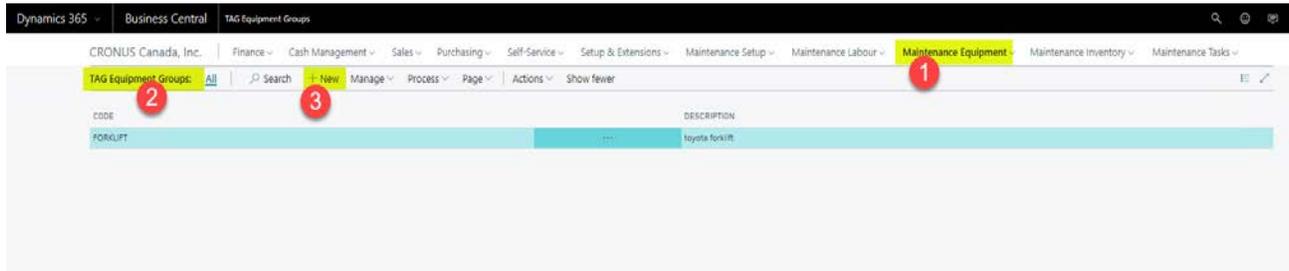
- 1) In the **maintenance Equipment** Menu, click on the **TAG Equipment Overview** to open the **Equipment Overview list**.
- 2) Click on the **new** button on the ribbon to create a new **Equipment**.
- 3) In the General fast tab, Tab over the ID. Field (or click on the Description field) to let TAG assign automatically Equipment ID or type manually the desired ID.
- 4) Enter the Description, Facility, Region, Address, Equipment group and Duty type fields.
- 5) On the Source fast enter date of purchase, purchase cost, Manufacturer. Equip Serial No and install Date fields.
- 6) Click Close to validate.



### Maintenance Equipment > TAG Equipment Group:

Create a new Equipment group:

- 1) In the **maintenance Equipment** Menu, click on the **TAG Equipment Group** to open the **Equipment Group list**.
- 2) Click on the **new** button on the ribbon to create a new **Equipment Group**.
- 3) Enter Code and Description fields.
- 4) Close the page and refresh the list to validate.



## Maintenance Inventory Navigation pane:

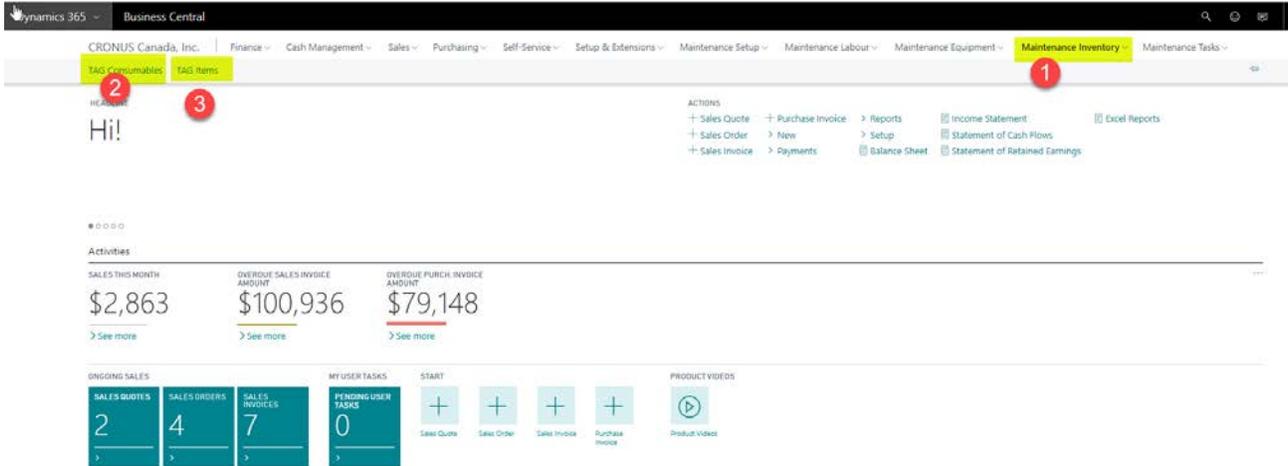
How to get there:

Click on the “Maintenance Inventory” Navigation Pane to open the Maintenance Inventory Menu

Under ‘Maintenance Inventory the user will see a number of lists, one for each code that must be set-up in Tag.

General instructions on how to set up the codes:

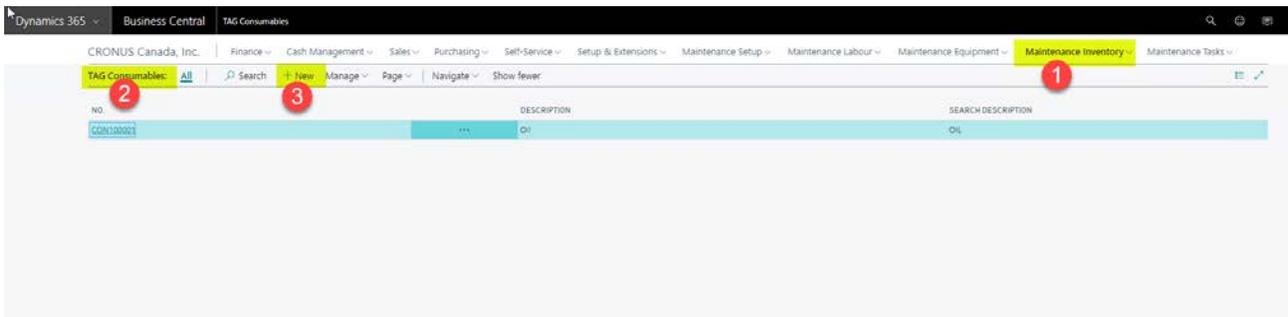
- Select the list
- Select ‘new’ on the action bar
  - o Some codes will open a card to fill in the values
  - o Some codes will allow edit to the list to fill in the values
- Create the code, with description, and fill in the required values



## Maintenance Inventory > TAG Consumable:

Create a new Consumable:

- 1) In the **maintenance Inventory** Menu, click on the **Consumable List** to open the **Consumable List**.
- 2) Click on the **new** button on the ribbon to create a new **Consumable**.
- 3) In the General fast tab, Tab over the No. Field (or click on the Description field) to let TAG assign automatically Equipment No or tape manually the desired No.
- 4) Enter the Description and Unit of Measure Code fields.
- 5) On the Cost fast tab Purchase Cost and Cost When Consumed fields.
- 6) Close the page and refresh the list to validate.



Dynamics 365 Business Central TAG Consumables > CON10001

NEW - TAG CONSUMABLE CARD - CON10001

## CON10001

**General**

No.	CON10001	Unit of Measure Code	
Description		Item Category Code	
Navigation Qty On Hand	0.000	Work Procedures	
Qty on Planned Orders	0.000	Assigned Templates	
Qty on Released Orders	0.000	Date Filter Policies	

**Cost**

Purchase Cost	0.000
Cost When Consumed	0.000

Dynamics 365 Business Central TAG Items > Item Card

NEW - ITEM CARD

Item Card

**Item**

Description	*	Base Unit of Measure	*
Blocked	0	Item Category Code	
Type	Inventory		

**Inventory**

Inventory	0	Unit Volume	0
Stockout Warning	Default (Yes)	SAT Item Classification	

**Costs & Posting**

<b>COST DETAILS</b>		<b>POSTING DETAILS</b>	
Costing Method	FIFO	Gen. Prod. Posting Group	*
Standard Cost	0.000	Tax Group Code	
Unit Cost	0.000	Inventory Posting Group	*
Net Invoiced Qty.	0		

**Prices & Sales**

Unit Price	0.000	Special Sales Prices & Discounts	Create New...
Profit %	0.000		

Replenishment >

## TAG Upgrading:

Upgrade of TAG assumes that the user has installed TAG extension package, has installed master data, and has created transactional data using TAG.

An upgrade of TAG involves updating the TAG extension package while maintaining the existing data and then reapplying the data to the upgraded package.

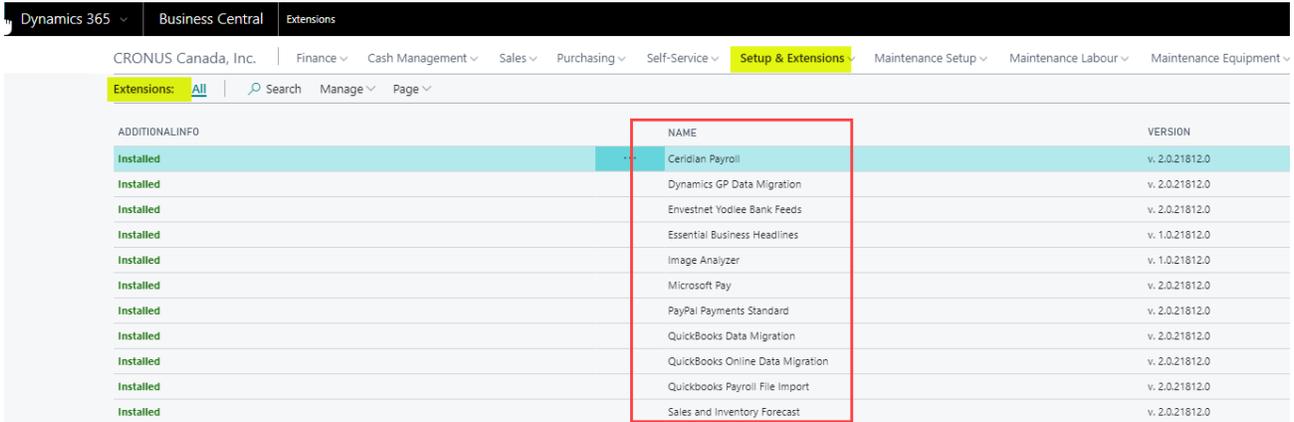
To upgrade TAG, you will need to first uninstall the existing TAG extension package, then load a replacement TAG extension package (TAGNew.app).

This process follows the same instructions for unpublish and uninstall as described in section 3.3, and publishing and installing as described in section 3.2.

When finished the upgrade of TAG, the result will have the installed TAG extension package with the existing data as before the upgrade.

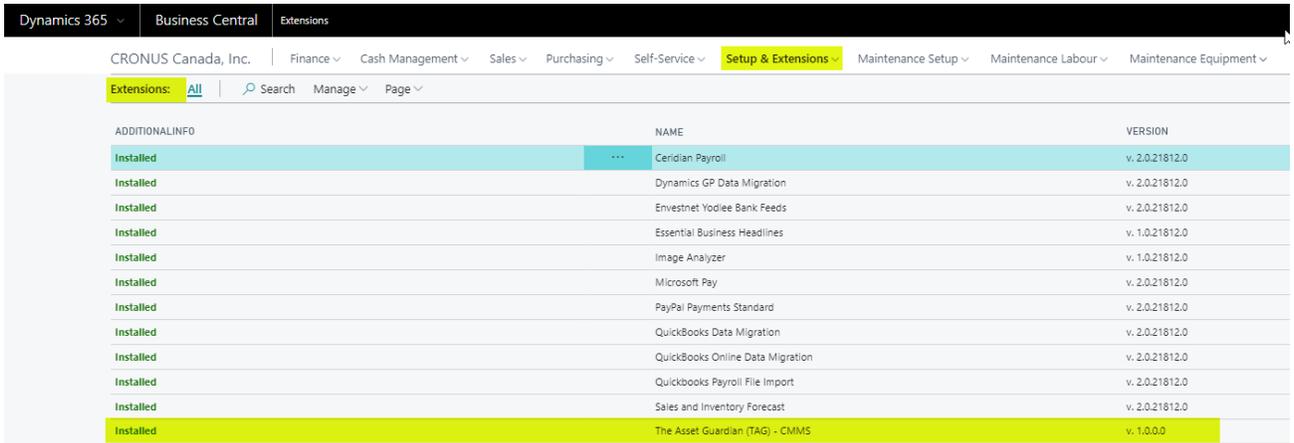
**Steps:**

- Verify the current version and the current data.
- Uninstall and Unpublish the current version:



ADDITIONALINFO	NAME	VERSION
Installed	Ceridian Payroll	v. 2.0.21812.0
Installed	Dynamics GP Data Migration	v. 2.0.21812.0
Installed	Ervestnet Yodlee Bank Feeds	v. 2.0.21812.0
Installed	Essential Business Headlines	v. 1.0.21812.0
Installed	Image Analyzer	v. 1.0.21812.0
Installed	Microsoft Pay	v. 2.0.21812.0
Installed	PayPal Payments Standard	v. 2.0.21812.0
Installed	QuickBooks Data Migration	v. 2.0.21812.0
Installed	QuickBooks Online Data Migration	v. 2.0.21812.0
Installed	Quickbooks Payroll File Import	v. 2.0.21812.0
Installed	Sales and Inventory Forecast	v. 2.0.21812.0

- Install and publish the new version:  
Load the new TAG extension package before republishing and Reinstalling:



ADDITIONALINFO	NAME	VERSION
Installed	Ceridian Payroll	v. 2.0.21812.0
Installed	Dynamics GP Data Migration	v. 2.0.21812.0
Installed	Ervestnet Yodlee Bank Feeds	v. 2.0.21812.0
Installed	Essential Business Headlines	v. 1.0.21812.0
Installed	Image Analyzer	v. 1.0.21812.0
Installed	Microsoft Pay	v. 2.0.21812.0
Installed	PayPal Payments Standard	v. 2.0.21812.0
Installed	QuickBooks Data Migration	v. 2.0.21812.0
Installed	QuickBooks Online Data Migration	v. 2.0.21812.0
Installed	Quickbooks Payroll File Import	v. 2.0.21812.0
Installed	Sales and Inventory Forecast	v. 2.0.21812.0
Installed	The Asset Guardian (TAG) - CMMS	v. 1.0.0.0

- You should have the new version with restored data .

