Installation and Configuration Guide

TAG for Microsoft Dynamics 365 Business Central
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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 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 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)

Note: this document was written with the understanding that the testing will be done using setup language file 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:
  
  


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, profile Tag Maintenance Manager, and modifications to user profile ‘Business Manager’. It is important that after install the initial testing user is assigned profile ‘Tag Maintenance Manager’ or profile ‘Business Manager’ to be able to see the TAG screens and complete the setup.

Any user can be assigned Role center ‘Tag Maintenance Manager’ from the settings page to access the Tag full menu directly.
4. Tag Configuration and Initial Setup

Business Central Notes and User setup:

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

Important
Note: **ADMIN user should be used to perform initial Tag setup as the user 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 VALIDATION user that will have Basic Permissions and as well the Tag Permission sets, and not Super permission.**

In this document we will reference ADMIN USER were required for steps.

**BC User Setup Requirements:**

- **Assign Permission Sets:**
  
  The ADMIN USER ID should be assigned TAG permission Sets as well as super:
  
  - Add: Tag-ALL_R
  - Add: Tag-ALL_RIMDE
  
  The VALIDATION USER ID must be assigned TAG permission sets as well as Basic:
  
  - Add: Tag-ALL_R
  - Add: Tag-ALL_RIMDE
Assign Profile Role:

The VALIDATING USER ID must have a tag specific Role Tailored Client profile assigned.

Assign either: profile ‘Business Manager’ or Profile ‘Tag Maintenance Manager’

- Open the user personalization for Role Tailored Client
- Assign the validating user profile ‘Business Manager’
  (from settings or user personalization’s)
- Restart D365 by sign out and sign in.
Expected Result of User setup:
On sign in after assigning permission sets and Profile, the role center page will show the below TAG Menus in the Navigation pane:

If you do not see the menu bar, repeat the user setup steps.

Tag Initial Data and Master Code Setup:

Summary Insight Note For Review Testing:
TAG has a License Token Key process that sets Tag Plan to values: Express, CMMS, EAM. The restrictions for each are described in Appendix 1. Express is for review testing, CMMS and EAM are purchased to allow access to Tag functions.

Before any portion of TAG can be used
a. **The ADMIN USER must open page TAG Control to initialize Tag Plan to Express.**
   Note:
   Express is designed for review testing of the Tag Maintenance Base Software. For CMMS (base) or EAM (advanced) purchased Key Contact VSD to access additional functionality without Express restrictions. The restrictions for Tag Plan Express are detailed in Appendix 1 below.

b. **The ADMIN USER must add Tag users manually on the Tag Licensing page:**
   Note:
   adding the tag user will apply the Tag Permission set's to the user, which will in turn allow the user to initialize Tag starting data in the following steps.

c. **The ADMIN USER must set up some initial data and users on page Tag User setup.**
   Note:
   To simplify the setup process for review testing Tag has provided an action button ‘Initialize Default Setup’ on page Tag Controls. This button sets starting default Tag values. Appendix 1 defines Initial default values and manual setup process for these values.
TAG Plan and Tag Initial Data Setup:

To setup TAG initial data and master codes in Dynamics 365 for Business Central, perform the steps below:

Important: ADMIN USER REQUIRED FOR THIS STEP. The user that opens Tag controls, and clicks on action Initialize Tag data must be Admin user (super) to allow permissions to be insert.

Set Tag Plan

a. **To Set Tag Plan to Express**
   - Open page Maintenance Setup > Tag controls
   
   Expected result: Tag Plan will be set to Express by default if not assigned yet. Confirm: Tag controls Page > General Fast tab > Field Tag Plan Selector
   
   **Note:**
   *If Testing or Reviewing without purchase, and Tag plan is set to Express, Then you can skip to step Initial Data Setup.*

   If Tag Plan = express, then limited Testing, validation can be performed. The limitations are described in Appendix 1.

b. **To set Tag Plan to CMMS or EAM using a purchased Tag Plan key.**

   To set Tag Plan to CMMS or EAM please contact VSD to purchase a monthly subscription to Tag:
   - [https://www.theassetguardian.com/](https://www.theassetguardian.com/) by phone at +1-450-419-5559 or +1-866-444-2366
   - VSD will provide a key to change Tag Plan to remove Express restrictions.

   **Steps:**
   - Contact Verosoft Design (VSD) to get a Tag Plan Licensing key.
   - Open page Maintenance Setup> Tag controls
   - Select Action ‘Tag Licensing’ to open page Tag Licensing
   - On General Fast Tab > Paste the License Key token in Field Tag Key
   - Select Action ‘Validate Tag Key’ to activate the purchased Tag Plan.

   Expected result:
   - Tag Plan will be set to value CMMS or EAM
   - Expiry date will be populated
   - Expiry reminder will be populated
Licensed users will be populated

If Tag Plan is set to CMMS or EAM then restrictions are removed and additional default values can be added to continue with additional described steps outlined in Appendix 1.

Open Tag Controls to confirm Tag Plan

Apply Tag Plan Key if purchased.
Initial Data setup:

c. Initial Setup Of Tag Default Values:

This step sets typical Tag maintenance values and some demonstration data to allow for testing review or validation.

Important: ADMIN USER REQUIRED FOR THIS STEP.
The user that opens Tag controls, and clicks on action Initialize Tag data must be Admin user (super) to allow permissions to be insert.

Note: action ‘Initialize Tag Data’ can only be performed once if Tag Plan = Express. To perform a second time, Tag plan must be set to CMMS or EAM.

Steps:
1. Open page Maintenance Setup> Tag controls
   (confirm Tag Plan has a value: Express, CMMS, EAM)

2. On the ribbon click on Actions > button ‘Initialize Default Values’
   Note:
   If error ‘You are not a licensed Tag user’
   Then the ADMIN USER needs to go to page Tag Licensing
   And confirm on Fast Tab ‘Tag Users’ the combination of: user account, company, and Tag user = yes for the user. Tag Plan limits the number of Tag users.

3. Expected result: typical Tag maintenance values and some demonstration data to allow for review or validation. Reference Appendix 1 for detail of default values.

Initialize Tag Default Values

![Initialize Tag Default Values](image-url)
**d. TAG User Setup:**

This step completes Tag user setup for base maintenance controls.

**Important: ADMIN USER REQUIRED FOR THIS STEP.**
The user that sets up or modifies Tag User setup should be an Admin user (super).

**Assign Tag User on Tag Licensing Page**

Go to Page Tag Controls
Click ribbon action button ‘Tag Licensing’
On page Tag licensing, Tag user Fast Tab

Add Users to the list with assigned Company
Assign Tag User Boolean to yes within the Tag Plan limit shown on the page.
   (reference field ‘licensed users’ on page Tag Licensing)
   (an error will show if the Tag user count exceeds licensed user count)

*Note: be sure to select the user from the lookup so that user validates.*

*Note: when a user is added and Tag User Boolean is set to yes, the user is added to the Tag user setup with typical controls set to yes.*

*Note:
*If Tag Plan = Express for testing review:*
   - Then one tag user is permitted per database for review purpose.*
Define Tag User Maintenance Controls Per User

Go to page Tag user setup
( Tag controls > Ribbon actions > Tag user setup)

Note: find and confirm for the test user that the controls are as desired in Tag user setup. Users can be manually added to tag user setup but must also be in Tag licensing with Tag user set to yes to avoid restriction messages.

Follow the steps below to add a user with typical permissions to Tag User Setup
1) Click on the new button on the ribbon to create a new Tag User
2) Click on the User ID Field to select a BC user
3) Enter the User name, select Technician Code, and enter Default Requester Text
4) Check yes to the desired tag user maintenance controls
(typical controls are listed below)
List of expected Tag user values

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>Select from BC User ID list</td>
</tr>
<tr>
<td>User Name</td>
<td>Enter the user’s name</td>
</tr>
<tr>
<td>Default requester text</td>
<td>Name to be displayed on requests</td>
</tr>
<tr>
<td>Technician code</td>
<td>Select the technician code for this user</td>
</tr>
<tr>
<td>Allow create work order from request</td>
<td>Set to yes</td>
</tr>
<tr>
<td>Allow Equipment transfer move</td>
<td>Set to yes</td>
</tr>
<tr>
<td>Allow equipment change and line delete on RWO</td>
<td>Set to yes</td>
</tr>
<tr>
<td>Allow standing order</td>
<td>Set to yes</td>
</tr>
<tr>
<td>Allow Capital Expenditure</td>
<td>Set to yes</td>
</tr>
<tr>
<td>Allow WO status Change</td>
<td>Set to yes</td>
</tr>
<tr>
<td>Allow WO deletion</td>
<td>Set to yes</td>
</tr>
<tr>
<td>Allow View Costs</td>
<td>Set to yes</td>
</tr>
</tbody>
</table>

Note:
- Tag user setup is required to open and work with Tag documents.
- Tag user setup controls what Tag functions the user may perform.
- The user must exist in the NAV database to be selected as a Tag user.

- Any time users on Tag Licensing and Tag Plan are adjusted you must confirm the Tag User setup and applied permissions.
  - if you change users on the licensing page by setting Tag user to no it will delete that user from Tag user setup as they are no longer permitted to access tag on that company.
  - and when you add users on the tag licensing page by setting Tag user to yes, it will add the user to Tag user setup and add the Tag typical controls. When added you must check the controls and populate some values like Default requester text.
Note:
If no Technician code in the list ... check that you completed Tag Initial data setup as above.
If a new Technician Code is desired, you can create it also from the Technician code field on the User setup list. Refer to Personnel in Appendix 1 for this detail.

*End Configuration and initial setup
5. **TAG Quick start Transactions Guide**

**Important:** Quick Start expects that Tag plan setup and initial Data setup has been completed. More detailed setup notes are available in Appendix 1.

**User note:**
The following section is to provide a quick excerpt of basic maintenance functions for Testing Review:
- Create work request ticket
- Create a Work order from Request
- Finish Request and Work order
- Create manual Released 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 TAG Maint. Manager** Role Center Profile.
- Go to the **Tag Tasks** Section, select **TAG Requests** menu
- click **New** and then **Work Request** to open the **Create Work Request Card**.
- Populate fields:
  - Enter a **Description**, and select an **equipment** ID.
  - Confirm field **Requester** has a value (will error if blank)
  - Select the desired information of request such as **Priority**, **Maintenance type**, **Problem Code**, **Work code**.

*Note: Description, Equipment ID and Requester are required fields for a Work Request based on the configuration in Tag Controls as set by Initial data setup*

- Click **Create** button to create the request

  *Note: leaving the page will not create the request as a message will advise.*

**Expected result:**
- Tag will create the request record and advise the record **Request number** and the Universal Document Number (UDN).

**Confirm:**
- you can open the Tag Request record from the **Tag Request** list.

**Steps:**

4000 Louis B. Mayer
Laval, QC (Canada) | 1.866.444.2386
H7P 0J1 | info@TheAssetGuardian.com
TheAssetGuardian.com
Create a Work Order from Request:

- Start from Tag TAG Mant. Manager Role Center Profile.
- Go to the TAG Tasks Section, select TAG Requests menu
- Select the Request that you want to create to work order
- Open the card by clicking on the first column (No.)
- Click Create Order button on the request ribbon.
- Select the desired options
  - Select Technician
  - Assign WO Status
- Click ok to create the work order
- Expected result: TAG provides the record Work order Number and UDN no.

Note: if Tag Plan = express, there are limitations as noted in section 5. Appendix 1.
• Confirm: From the selected Request:
  • Click Work order on the ribbon
  • The created work order card will open

(alternate: you can find the Work order on the Work order list)

Create WO from Request Steps:
**Note:** if Tag Plan = express, there are limitations as noted in section 5. Appendix 1.
Finish Request and Work order

- Start from Tag TAG Maint. Manager Role Center Profile.
- Go to the TAG Tasks Section, select TAG Requests menu
- Select the same Request with Work order
- Open the request card by clicking on the first column (No.)
- From the selected Request card, click work order on the ribbon
- The created released work order card will open
- On the released Work order Card, scroll down to Lines Fast Tab
- Confirm there is an equipment and technician code on the Work order line
- Enter an actual time
- On the Work order Ribbon, select action button ‘Complete’
  - Answer yes to complete

Expect result:
  - the released work order (RWO) will disappear leaving the original request
    (the RWO disappears when it is posted complete and a Finished work order (FWO) is created)

Confirmation:
  Return to the original request record to confirm:
  - The request now has work order type Finished
  - If ribbon button ‘Work order’ is selected the Finished work order opens
  - Fields on the work order show: FWO number and actual time
  - Click tracking to see the life cycle of the request to RWO to FWO

Note:
When a RWO related to a request is posted complete a FWO is created and the original Request is considered Finished. The request record is filtered out of the active request list using WO type = finished. The original request may be found in the Finished Request list.
  Role center > Tag History > Tag Finished Work Request list

Note:
On Post Complete of the Work order there are control validations that are performed depending on the configurations in Tag Controls. If Tag default data setup was used the following are the expected validations that may cause an control validation message (error) if missing or incomplete data in the Work Order being posted.
Below are a short list of validations and potential resolutions:

Requirements check: every Usage line for requirements must be complete with a Type, No, and Description. To resolve ... open Utilization or Usage and confirm the data.
Technician on RWO header check: the Scheduled Fast tab must have a technician code. To resolve go to Scheduled fast tab and populate the Technician code.

Technician on RWO line check: the Work order line must have a technician code. To resolve go to the WO lines and check that each line has a technician code.

Equipment on RWO header check: the General fast tab must have an Equipment ID populated. To resolve go to the General fast tab and select an equipment ID. (this will also populate the lines if yes is answered)

Equipment on RWO lines check: the work order line must have an Equipment ID. To resolve go to the WO lines and check that each line has an Equipment ID.

This is not a complete list, however these are typical potential messages that may occur on post of a RWO with typical setup.

Request Create RWO and complete to FWO
Create a Manual Released Work Order:

- Start from **Tag TAG Maint. Manager** Role Center Profile.
- Go to the **TAG Tasks** Section and click on the **TAG 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** fast tab, select a **work procedure** standard task or enter a **description** task manually.
- Scroll down to **Scheduled** fast tab and select a technician code for the Released Work Order (RWO)
  - Answer yes to apply technician code to all lines
- Return to the **Line Fast tab**, confirm the technician code and enter actual time
- Add requirements usage (inventory):
  - On the RWO ribbon, click on the ‘I’ to open the fact box pane
  - Factbox ‘order information’ > find and click on field ‘Expected Usage’ to open the requirements usage page
    (alternate: RWO ribbon > Navigate tab > usage action button)
  - enter a requirement by:
    - Change field ‘Type’ to Consumable
    - Select the Consumable ‘no’
    - Enter an actual quantity
    - Enter an expected cost

- Expected result: a RWO with Work order task lines, technician and time, usage and quantity.
- Confirmation: on the RWO ribbon select Navigate > Statistics action button to review the cost of time and inventory on the RWO.
Note: if Tag Plan = express, there are limitations as noted in section 5. Appendix 1.
Work Order Completion:

- Start from Tag Maint. Manager Role Profile
- Go to the TAG Tasks Section and click Tag Released Work Order menu.
- Select the desired work order, click on the first column (UDN) to open the work order card
- Confirm the technician on the scheduled fast tab
- Confirm the Technician and actual time on the work order lines fast tab
- Open Usage and Confirm the Requirements Type, actual Quantity, and Cost.
  1. Open Order Information fact box, click field Utilization drill through to open Usage page.
- Click Complete to post and close the work order.

Note:
On Post Complete of the Work order there are control validations that are performed depending on the configurations in Tag Controls. If Tag default data setup was used the following are the expected validations that may cause an control validation message (error) if missing or incomplete data in the Work Order being posted.

Below are a short list of validations and potential resolutions:

Requirements check: every Usage line for requirements must be complete with a Type, No, and Description. To resolve ... open Utilization or Usage and confirm the data.

Technician on RWO header check: the Scheduled Fast tab must have a technician code. To resolve go to Scheduled fast tab and populate the Technician code.

Technician on RWO line check: the Work order line must have a technician code. To resolve go to the WO lines and check that each line has a technician code.

Equipment on RWO header check: the General fast tab must have an Equipment ID populated. To resolve go to the General fast tab and select an equipment ID. (this will also populate the lines if yes is answered)

Equipment on RWO lines check: the work order line must have an Equipment ID. To resolve go to the WO lines and check that each line has an Equipment ID.

This is not a complete list, however these are typical potential messages that may occur on post of a RWO with typical setup.
Complete a Released Work order Steps
Note: if Tag Plan = express, there are limitations as noted in section 5. Appendix 1.
Preventative Maintenance: Date Meter Policies

Note:
The below steps to use Preventative Maintenance (PM) expect that Tag data initial setup was run and a DMP was created as test data (DMP100001) as well as default master data.

Note:
if reviewing under Tag Plan = express there is a limitation on number of DMP records (1)
The limitation is removed when purchase Tag Plan CMMS or EAM.
The intent is to allow testing review under Express.

- Start from Tag TAG Maint. Manager Role Center Profile.
- Go to the TAG Planning Section and click on the TAG Date Meter Policies Menu.
- Select the DMP record (DMP10001) from the list and open the card.
- Confirm the DMP record values:
  - Goto the General fasttab and confirm:
    Description has a value
    Equipment ID has a value
  - Goto the lines Fast tab and confirm:
    A DMP line exists with Description and Technician code
  - Goto the Schedule fast tab and confirm:
    A Technician is assigned to the DMP
  - Goto the Values fast tab and confirm:
    Type = Date
    Activate Date = yes
    Occurrence interval has a value (1W)
    Last service date has a value
    Next service date has a value

Confirm Date Meter Policy (DMP) Steps:
Preventative Maintenance:
Steps to create a PM WO from DMP and Complete

Note:
The below descriptive steps assume that Data initialization was run and therefore master file data exists in the database. (equipment, personnel, codes)

Note: the default values for PM WO generation are setup on the Tag controls page, Preventative Date Meter Setup Fast Tab.
The below steps assume that these are the values in use.

Note:
if reviewing under Tag Plan = express there is a limitation on number of DMP records (1)
The limitation is removed when purchase Tag Plan CMMS or EAM.
Please confirm you have the appropriate plan before proceeding.

Steps to create a Preventative Maintenance WO from DMP record and Complete
AutoPlan PM WO from DMP Card

- Start from Tag TAG Maint. Manager Role Center Profile.
- Go to the TAG Planning Section and click on the TAG Date Meter Policies Menu. Select a Date Meter Policy Record (DMP) and open the card.
- Confirm the DMP Record values as in previous step.
- Goto Tracking fast tab on the target DMP card
  Check field Released WO to confirm a WO does not exist for this DMP. (the fields are a flow field to the WO list)
Note: If a WO does exist, resolve by Completing or Deleting the record.
If a WO does not exist, proceed to autoplan

- On the Ribbon for the DMP card click on action button ‘Autoplan PM WO’
  On Autoplan PM WO dialogue box check that
  The policy No is the same as your target DMP
  The Evaluate through date is later than Next service date on the DMP
  Evaluate PM type = Date Meters
  Click ok on the Autoplan PM WO dialogue box

- A message will show indicating that a work order has been created.
  Default configuration is a Released work order.

- Return to the Tracking Fast Tab on the target DMP record and refresh the page
  Check Released WO field to confirm a WO now exists for this DMP record. (the fields
  are a flow field to the WO list)

- Drill into the WO list and open the WO card specific to the DMP
  The Description and Equipment should be the same as the source DMP
  In Tracking fast tab the field Policy no should be the same as the source DMP

- Complete the Released WO by clicking action button ‘Complete’ in the WO ribbon.
  This action will delete the RWO and create a FWO
  This action will update the DMP field ‘Last service date’ from the completed RWO
  Update of the last service date will calculate the next service date on the DMP.

- Return to the target DMP record
  Scroll down to the Values fasttab and confirm the last service date and next service
  date are updated
  Scroll down to the Tracking fast tab and confirm the finished work order.

Note:
The above steps are designed to minimize validation errors. Alternative and more advanced
setups and generation methods can be configured for different results. There is a brief
description of other generation methods in Appendix 1. Contact VSD for more information.

Note:
If the message shows that 0 work orders were created, and there was an error.
Check the DMP record> tracking fast tab> field Autoplan PM error Text.
Resolve the error if related to setup or config.
If the message is ‘you are not a licensed Tag user’ check your user setup at the beginning of
this document.

Note:
If the message shows that 0 work orders were created, it means that the system calculates
that the PM is not due. Some typical reasons:
- **Activate Date on the DMP = no or Blocked = yes**
  To resolve change the field values on the DMP
- **A PWO or RWO work order already exists for that DMP**
  To resolve you can go to tracking fast tab as described and complete or delete the WO found.
- **The target DMP equipment field values do not match the dialogue box filters**
  Open the DMP Equipment
  Check that the equipment fields Duty Type and Duty Status are as expected.

Create PM WO from DMP and Complete Steps
Reference Finished Work Order (FWO) statistics

- Start from TAG Maint. Manager Role Center Profile.
- Go to the Tag History Section and click on the TAG Finished Work Order menu.
- Select one Finished Work Order and click on the UDN field to open the card.
- In the ribbon, click on the statistics button to open the statistics card.

Steps:
### Costs

<table>
<thead>
<tr>
<th>Description</th>
<th>Original Price</th>
<th>Rate</th>
<th>Applied Rate</th>
<th>Actual</th>
<th>Base</th>
<th>Evaluated</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Cost</td>
<td>0.00</td>
<td>3.00</td>
<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Tool Cost</td>
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<td>3.00</td>
<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
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<td>Raw Cost</td>
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<tr>
<td>OPE Cost</td>
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<td>3.00</td>
<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
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</tr>
<tr>
<td>Other Cost</td>
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<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total Cost</td>
<td>0.00</td>
<td>3.00</td>
<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

### Quantities

<table>
<thead>
<tr>
<th>Items</th>
<th>Count</th>
<th>Standard Time</th>
<th>Estimated Time</th>
<th>Actual Time</th>
<th>Percentual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Piece</td>
<td>1</td>
<td>3.00</td>
<td>10.00</td>
<td>5.00</td>
<td>100.00</td>
</tr>
<tr>
<td>Piece</td>
<td>0</td>
<td>3.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total</td>
<td>1</td>
<td>3.00</td>
<td>10.00</td>
<td>5.00</td>
<td>100.00</td>
</tr>
</tbody>
</table>
Reference Equipment Statistics

- Start from **TAG Maint. Manager** Role Center Profile.
- Go to the **Tag Masters** Section and click **TAG Equipment Overview** menu.
- Click on the ID field to open the equipment card.
- In the ribbon, click on Navigate and then on **statistics->Equipment Statistics** menu to open the Equipment statistics card.
- Click on the **Equipment Analysis** button to get work code maintenance analysis.

**Steps:**
Select Equipment:

Open Equipment statistics:
Equipment Analysis:

*End of Quick Start for Review Testing.*
6. Appendix 1: Tag Additional Details

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 when = Express:

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 0
- Date Meter Policies - restricted to 1
- Requests – restricted to 3
- Planned/Released work order – restricted to 3

To perform deeper trials or use TAG as a solution TAG Plan will need to be set to either CMMS or EAM.

To set Tag Plan please contact VSD at: https://www.theassetguardian.com/ or by phone at +1-450-419-5559 and purchase a monthly subscription to Tag. We will provide a key to change Tag Plan, which in turn removes the restrictions.

Typical Setup on Tag Controls:

Note: many of the values described below are set by action ‘Initialize Tag Data’

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)

![TAG Controls](image)

**Note**: Tag Plan Selector is populated automatically to “Express” value after initial opening the page of the page. It can be set to CMMS or EAM by contacting VSD for a license.

**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:**

<table>
<thead>
<tr>
<th>Code</th>
<th>Tag Description</th>
<th>Prefix</th>
<th>Booleans</th>
<th>Starting No</th>
<th>Last No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tag-EQ</td>
<td>Equipment</td>
<td>Prefix = EQ</td>
<td>Default = yes, Manual = yes</td>
<td>EQ-00001</td>
<td>EQ-00000</td>
</tr>
<tr>
<td>Tag-Cons</td>
<td>Consumable</td>
<td>Prefix = CON</td>
<td>Default = yes, Manual = Yes</td>
<td>Cons-00001</td>
<td>Cons-00000</td>
</tr>
<tr>
<td>Tag-Tool</td>
<td>Tool</td>
<td>Prefix = Tool</td>
<td>Default = yes, Manual = yes</td>
<td>Tool-00001</td>
<td>Tool-00000</td>
</tr>
<tr>
<td>Tag-UDN</td>
<td>Document tracking</td>
<td>Prefix = UDN</td>
<td>Default = yes, Manual = no</td>
<td>UDN-00001</td>
<td>UDN-00000</td>
</tr>
<tr>
<td>Tag-Temp</td>
<td>Template</td>
<td>Prefix = Temp</td>
<td>Default = Yes, Manual = Yes</td>
<td>Temp-00001</td>
<td>Temp-00000</td>
</tr>
<tr>
<td>Tag-WP</td>
<td>Work Procedure</td>
<td>Prefix = WP</td>
<td>Default = yes, Manual = yes</td>
<td>WP-00001</td>
<td>WP-00000</td>
</tr>
<tr>
<td>TAG-WPSS</td>
<td>Sub Steps</td>
<td>Prefix = WPSS</td>
<td>Default = yes, Manual = yes</td>
<td>WPSS-00001</td>
<td>WPSS-00000</td>
</tr>
<tr>
<td>Tag-Req</td>
<td>Request</td>
<td>Prefix = Req</td>
<td>Default = yes, Manual = no</td>
<td>Req-00001</td>
<td>Req-00000</td>
</tr>
<tr>
<td>Tag-PWO</td>
<td>Planned work order</td>
<td>Prefix = PWO</td>
<td>Default = yes, Manual = no</td>
<td>PWO-00001</td>
<td>PWO-00000</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Tag</th>
<th>Released work order</th>
<th>Prefix = RWO</th>
<th>Manual = no</th>
<th>Default = Yes, Manual = no</th>
<th>RWO-00001</th>
<th>RWO-00000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tag-FWO</td>
<td>Finished work order</td>
<td>Prefix = FWO</td>
<td>Manual = no</td>
<td>Default = yes, Manual = no</td>
<td>FWO-00001</td>
<td>FWO-00000</td>
</tr>
<tr>
<td>Tag-Prj</td>
<td>Tag Project Contract</td>
<td>Prefix = PRJ</td>
<td>Default = Yes, Manual = Yes</td>
<td>PRJ-00001</td>
<td>PRJ-00000</td>
<td></td>
</tr>
</tbody>
</table>

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.
6) Once the code is created, use the lines button to assign the starting no and last no.
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’

**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
  Leave other fields to default values
Setup of Tag User Setup:

- 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.

Note: the initial ADMIN USER to set tag plan will be added automatically to Tag user Setup. There is a limitation of the number of users allowed to use Tag as described in Tag licensing.

If Tag Plan = express for testing/Validating, then the testing user must be assigned on page Tag Licensing. Additional users can be added with the Tag Plan license.

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1
Setup of Maintenance Codes:

How to get there:
In the control page, Under Navigate, the user will see a number of sub menus 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
  - Some codes will open a card to fill in the values
  - 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, enterprise → 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.

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1
“Maintenance Setup” Menu:

Maintenance Setup >TAG Facilities
The following steps allows you to create a new facility:

1) Go to the control page, under Navigate, click Tag Location Codes Setup and then on ‘Tag 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.

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1
Maintenance Setup > TAG Region:
Create a new Region:
- Go to the control page, under Navigate, click Tag Location Codes Setup and then on ‘Tag Regions to open the list of existing Regions
- Click on the new button on the ribbon to create a new Region.
  - Add a code with description
- Close the page and refresh the list to validate.

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1
Follow the same steps to manage Tag areas, Tag Lines and Tag Enterprise.

**Maintenance Setup > TAG Equipment code setup:**

Create a new Equipment group:

1. Go to the control page, under Navigate, click Tag Equipment Codes Setup and then on ‘Tag Equipment group’ to open the existing 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.
Follow the same steps to create the rest of Tag Equipment code setup:

Tag Equipment SubGroups
Tag Main Codes
Tag Primary Codes
Tag Secondary Codes

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1

Maintenance Setup > TAG Document code setup:
Create a new maintenance type:
  1) Go to the control page, under Navigate, click Tag Document Codes Setup and then on 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 Document code setup:
Create a new order type:
1) Go to the control page, under Navigate, click Tag Document Codes Setup and then on Tag Order Types to open the maintenance 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.

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1
Create a new Status:

1) Go to the control page, under Navigate, click Tag Document Codes Setup and then on Tag Status Codes to open the status 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.

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1

Follow the same steps to create the rest of Maintenance Codes:
TAG Work Codes
TAG Problem Codes
TAG Reason Codes
TAG Rank Priorities
Tag Skills
Tag Certifications
Tag Failures
Tag Meter Types
Tag Posting Codes
Maintenance Setup > TAG Labor code setup:
Create a new Personnel group:
- Go to the control page, under Navigate, click Tag Labor Codes Setup and then on Tag Personnel Group to open the existing list.
- Click on the new button on the ribbon to create a new personnel group.
- Tape the Code, description and Unit Cost fields and close the page

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1

Create a new technician or supervisor:
- Go to the control page, under Navigate, click Tag Labor Codes Setup and then on Tag Personnel to open the personnel list.
- Click on the new button on the ribbon to create a new technician.
- Tape manually the desired No.
- Tape the Name, Region, Facility, Personnel Type, Personnel Group fields.
- In the Personnel Data, tape the desired fields (address, Tel, fax...).
- In the cost fast tab, enter the “Per hour cost override” and Posting Code fields.
- Close the page and refresh the list to validate the personnel creation.

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1
TAG Planning:

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

1) In the TAG Planning Menu, click on the TAG 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 and expected unit cost that are 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).

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1
## Work Orders pending approval.

### Activities

**TAG Activities**
- Maintenance Requests
  - Held Requests: 0
  - Active Requests: 335
  - Active Rej: 2
  - Pending App: 1
  - Planned Work Orders: 1
  - Planned MRO: 0
  - Planned Orders: 0
  - Released MRO: 4
  - Released Orders: 0
  - Released Work Orders: 9

### Insights

**TAG KPI Performance Index**

### WP100003

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Standard Time</th>
<th>Estimated Step Time</th>
<th>Master WP Est Time Qty</th>
<th>Requirements</th>
<th>Qualifications</th>
<th>Attachments</th>
<th>Recent Subtasks to WD LL.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Electrical Inspection</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

**Work Code**
- Keep Work Code
- Equipment Group
- Personnel Group
- Planned Work Orders: 1
- Released Work Orders: 0
- Finished Work Orders: 0
- Assigned Templates: 0
- Assigned Data Meters: 0
- Creation Date: 2019-12-31
- Last Date Modified: 2019-12-31
The following steps allow you to create a new Template:

1) In the **TAG Planning** Menu, click on the **TAG Template** to open the **Tag Template** list:
2) Click on the **new** button on the ribbon to create a new **Template**:
3) On the general fast tab, enter **No, Description, Priority, Maint type** and all desired fields.
4) On the Line sub menu, click on the Related Requirements button to enter the 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 and expected unit cost that are expected to be used of the item.
If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Description 2</th>
<th>Region</th>
<th>Facility</th>
<th>Priority</th>
<th>Job No.</th>
<th>Work Code</th>
<th>Status</th>
<th>Reason Code</th>
<th>Problem Code</th>
<th>Order Type</th>
<th>Standard Time</th>
<th>Estimated Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEMP100001</td>
<td>Electrical Inspection</td>
<td></td>
<td></td>
<td></td>
<td>Routine</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>2.00</td>
<td></td>
</tr>
</tbody>
</table>
Note:
Work procedure, templates → these are tools used by the user to quickly populate work order header and lines with pre-defined values

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1

Preventative Maintenance: Date Meter Policy
Create new Date Meter Policy (DMP)

Note:
The below descriptive steps assume that Data initialization was run and therefore master file data exists in the database. (equipment, personnel, codes)

Note:
if reviewing under Tag Plan = express there is a limitation on number of DMP records (1)
The limitation is removed when purchase Tag Plan CMMS or EAM.
Please confirm you have the appropriate plan before proceeding.
Create new Date Meter Policy (DMP)

- Start from Tag TAG Maint. Manager Role Center Profile.
- Go to the TAG Planning Section and click on the TAG Date Meter Policies Menu.
- Click on New Button on the ribbon.
- Tab over the No. field to click on the Description field and let TAG assign automatically a record No.
- In the General Fast tab enter the Description, Equipment ID, Order Type and other desired fields.
- Open the Line Section, either select a work procedure or enter a description task line manually.
- In the Schedule Fast Tab set Technician code and update to lines
- In Values fast tab
  - select Date as Date Meter Type,
  - Enter occurrence interval (1D, 1W or 1M)
  - Enter a date in the field ‘Last service Date’ (pick a date in the past)
  - Set Activate Date check box to yes

Expected result:
- A Date meter Policy record with DMP line setup for Date trigger
- In the values field ‘next service date’ should have a value based on the combination of Last service date and occurrence interval

Steps:
Preventative Maintenance:
Steps to create a PM WO from DMP and Complete

Note:
The below descriptive steps assume that Data initialization was run and therefore master file data exists in the database. (equipment, personnel, codes)

Note: the default values for PM WO generation are setup on the Tag controls page, Preventative Date Meter Setup Fast Tab.
The below steps assume that these are the values in use.

Note:
if reviewing under Tag Plan = express there is a limitation on number of DMP records (1)
The limitation is removed when purchase Tag Plan CMMS or EAM.
Please confirm you have the appropriate plan before proceeding.
Steps to create a Preventative Maintenance WO from DMP record and Complete AutoPlan from DMP Card

- Start from Tag TAG Maint. Manager Role Center Profile.
- Go to the TAG Planning Section and click on the TAG Date Meter Policies Menu. Select a Date Meter Policy Record (DMP) and open the card.
- Goto the General fasttab and confirm:
  - Description has a value
  - Equipment ID has a value
- Goto the lines Fast tab and confirm:
  - A DMP line exists with Description and Technician code
- Goto the Schedule fast tab and confirm:
  - A Technician is assigned to the DMP
- Goto the Values fast tab and confirm:
  - Type = Date
  - Activate Date = yes
  - Occurrence interval has a value
  - Last service date has a value
  - Next service date has a value
- Goto Tracking fast tab on the target DMP card
  Check field Released WO to confirm a WO does not exist for this DMP.
  (the fields are a flow field to the WO list)
  **Note:** If a WO does exist, resolve by Completing or Deleting the record.
  If a WO does not exist, proceed to autoplan
- On the Ribbon for the DMP card click on action button ‘Autoplan PM WO’
  On Autoplan PM WO dialogue box check that
  - The policy No is the same as your target DMP
  - The Evaluate through date is later than Next service date on the DMP
  - Evaluate PM type = Date Meters
  - Click ok on the Autoplan PM WO dialogue box
- A message will show indicating that a work order has been created.
  Default configuration is a Released work order.
- Return to the Tracking Fast Tab on the target DMP record and refresh the page
  Check Released WO field to confirm a WO now exists for this DMP record. (the fields are a flow field to the WO list)
Drill into the WO list and open the WO card specific to the DMP. The Description and Equipment should be the same as the source DMP. In Tracking fast tab the field Policy no should be the same as the source DMP.

Complete the Released WO by clicking action button ‘Complete’ in the WO ribbon. This action will delete the RWO and create a FWO. This action will update the DMP field ‘Last service date’ from the completed RWO. Update of the last service date will calculate the next service date on the DMP.

Return to the target DMP record. Scroll down to the Values fasttab and confirm the last service date and next service date are updated. Scroll down to the Tracking fast tab and confirm the finished work order.

Note: The above steps are designed to minimize validation errors. Alternative and more advanced setups can be configured for different results. Contact VSD for instruction.

Note: If the message shows that 0 work orders were created, it means that the system calculates that the PM is not due. Some typical reasons:

- Activate Date on the DMP = no or Blocked = yes
  To resolve change the field values on the DMP.
- A PWO or RWO work order already exists for that DMP
  To resolve you can go to tracking fast tab as described and complete or delete the WO found.
- The target DMP equipment field values do not match the dialogue box filters
  Open the DMP Equipment
  Check that the equipment fields Duty Type and Duty Status are as expected.
Preventive work order (PM)
Alternative PM generation methods

AutoPlan PM Work Orders from DMP list:

- Start from Tag TAG Maint. Manager Role Center Profile.
- Go to the TAG Planning Section and click on the TAG Date Meter Policies menu.
- Click on AutoPlan PM WO Button on the ribbon
  select the desired options (PM horizon period (evaluate through date) ....)
  and click ok.
- PM Work Orders will be created similar to the single AutoPlan.

*Note that Tag AutoPlan PM Work Orders can be run from DMP list as a global PM process or can be run as a single PM from DMP card.*
**Steps:**

Tag AutoPlan – from DMP list

Plan PM WO from Order Worksheet:

- Start from Tag TAG Maint. Manager Role Center Profile.
- Go to the TAG Planning Section and click on the TAG Order Worksheet menu.
- Click on Evaluate Policies Button on the ribbon, select the desired options (evaluate through date ....) and click ok.
- Once you get the PM suggestions, click on Build Orders button to create the related PM Work Orders
TAG Project Contract:

Important: Tag Project contract requires tag Plan=EAM to use, if you’re in Express or in CMMS mode, you will receive an error due to plan restriction.

Note:
The below descriptive steps assume that Data initialization was run and therefore master file data exists in the database. (equipment, personnel, codes)

Start from Tag TAG Maint. Manager Role Center Profile.
- Go to the **TAG Planning** Section and click on the **TAG Project Contract** 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**, **Enterprise**, **Facility** and all the desired fields.
- Open the **Line** Section, either select a **work procedure** or enter a **description** task manually, enter either **WP Quantity** (flat rate) or **Estimated Time** and then **Unit Cost**.
- In the **Contract Details** fast tab, set Project Contract Status field to **Signed**.
- Goto **Lines** section and click **Manage** and then **Related Requirement**.
- Click **New**, select **Item** as **Type**, enter item No in **No** field or click on three dots button to open the list and select, enter the **Expected Quantity**
- Click **New** and repeat the same steps but for Consumable (Type).

*Note: if Tag Plan = express, there are limitations as noted in section 5. Appendix 1.*
Create WO from Project Contract:

- Start from Tag TAG Maint. Manager Role Center Profile.
- Go to the TAG Planning Section and click on the TAG Project Contract menu.
- Select one project contract and click on the No field to open the card.
- Click More Options, Actions and then Create Work Orders buttons.
- In Project Worksheet list, enter Quantity to Transfer.
- In Related Requirement list, enter Quantity to Transfer.
- Click More Options, Actions and then Create Planned Work Order buttons.
- A new WO will be created and showing the card.

Steps:

1. Start from Tag TAG Maint. Manager Role Center Profile.
2. Go to the TAG Planning Section and click on the TAG Project Contract menu.
3. Select one project contract and click on the No field to open the card.
4. Click More Options, Actions and then Create Work Orders buttons.
5. In Project Worksheet list, enter Quantity to Transfer.
6. In Related Requirement list, enter Quantity to Transfer.
7. Click More Options, Actions and then Create Planned Work Order buttons.
8. A new WO will be created and showing the card.
View related WO from Project Contract:

- Go to the TAG Planning Section and click on the TAG Project Contract menu.
- Select one project contract and click on the No field to open the card.
- Click More Options and then Navigate buttons.
- Notice that there are three buttons to use to get the related project work orders, Planned Work orders, Released work orders and finished work orders buttons.
TAG Master files:

This section contains tools on what is maintained (Equipment), who maintained (resources) and what is used (related requirements).

**TAG Equipment Overview:**

Create a new Equipment:

1) In the Tag Masters Menu, click on the TAG Equipment Overview to open the list.
2) Click 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 tape manually the desired ID.
4) Enter the Description, Facility, Region, Address, Equipment group and Duty type fields.
5) On the Source fast tab, enter date of purchase, purchase cost, Manufacturer. Equip Serial No and install Date fields.
6) Click Close to validate.

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1
Outside Service Provider (OSP):
Create a new Outside Service Provider (OSP):

1) In Tag Masters Menu, click on the Outside Service Provider to open the existing list.
2) Click New button 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.

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1
TAG Consumables:

Create a new Consumable:

1) In the TAG Master Menu, click on the TAG Consumable to open the existing List.
2) Click New button 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 enter Cost When Consumed and Posting code fields.
6) Close the page and refresh the list to validate.

If Tag Plan = Express for Testing/Validation, see Tag Plan note in section 5. Appendix 1
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:

  - Install and publish the new version:
    - Load the new TAG extension package before republishing and Reinstalling:
• You should have the new version with restored data.