

Integration



Control



Simplicity

Mobility

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:
 - 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.

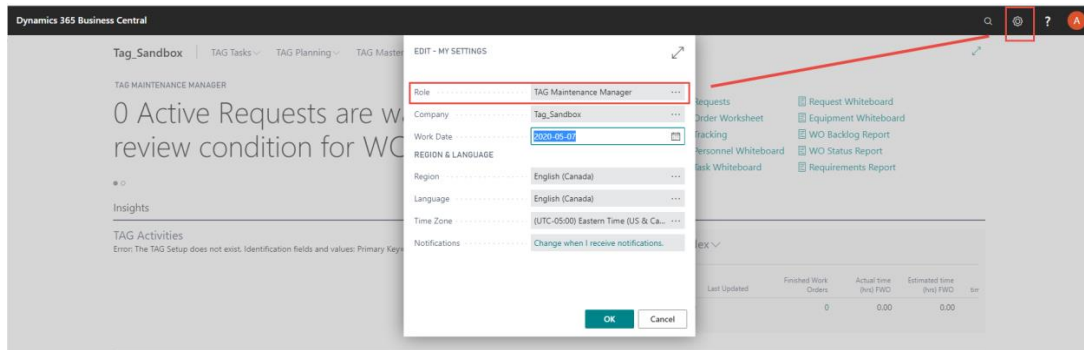
Solution Requirements:

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, 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:

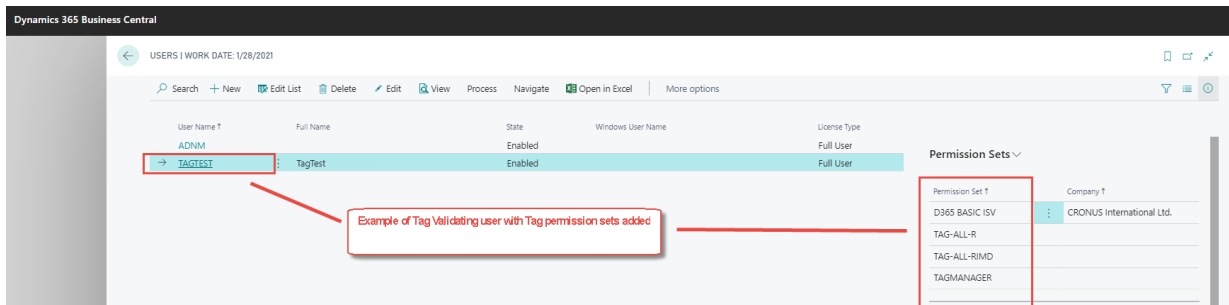
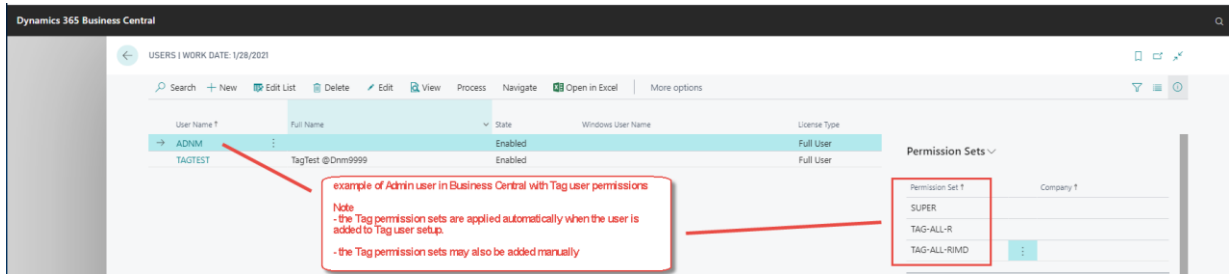
- Assign Permission Sets:

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

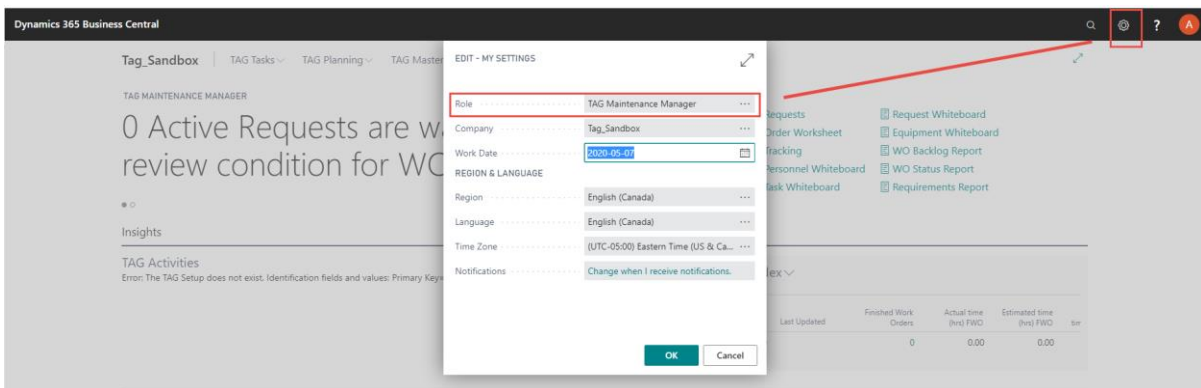


- Assign Profile Role:

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

Assign either: profile 'Business Manager' or Profile 'Tag Maintenance Manager'

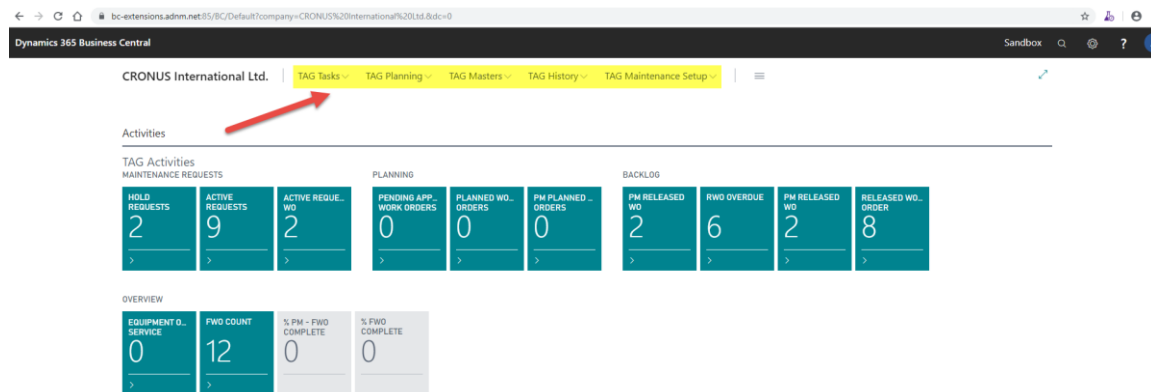
- o Open the user personalization for Role Tailored Client
- o Assign the validating user profile 'Business Manager' (from settings or user personalization's)
- o Restart D365 by sign out and sign in.



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

- 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.

- 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.

- 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/>

by phone at [+1-450-419-5559](tel:+14504195559) or [+1-866-444-2366](tel:+18664442366)

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.

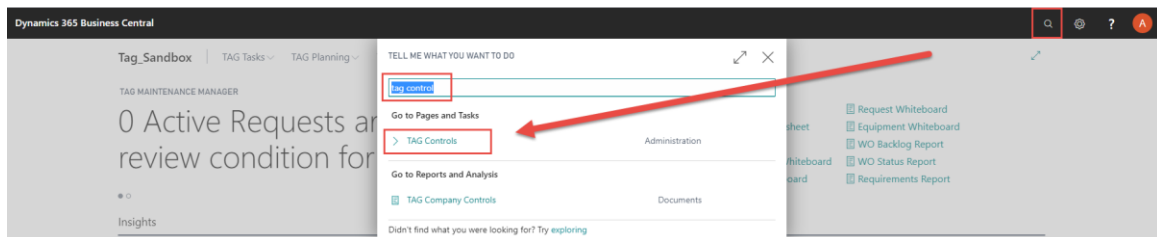
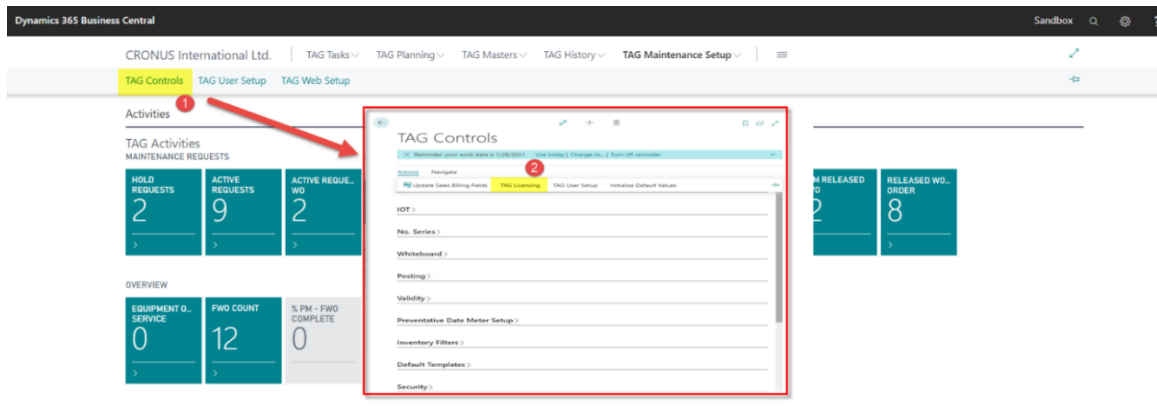
Expected result:

- Tag Plan will be set to value CMMS or EAM
- Expiry date will be populated
- Expiry reminder will be populated

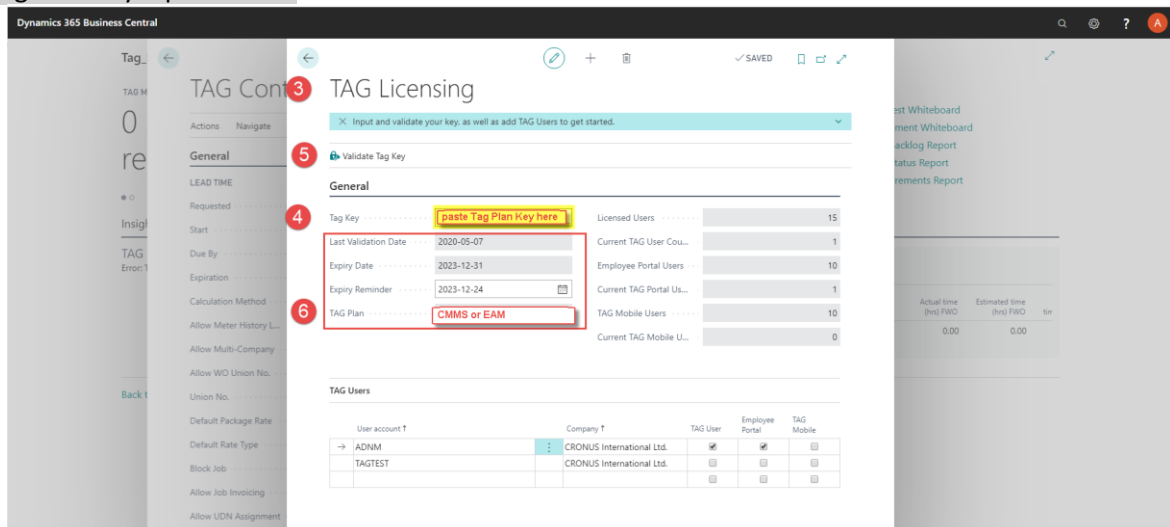
- Licensed users will be populated

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:

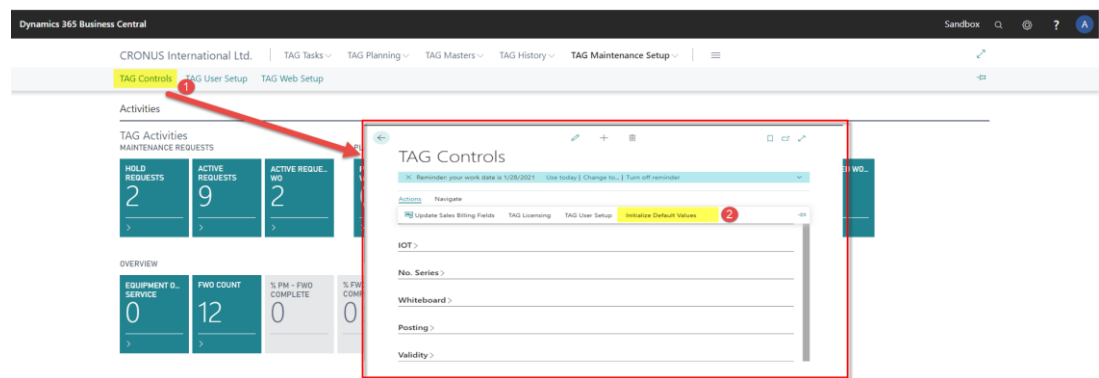
If error 'You are not a licensed Tag user'

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



Expected result

The screenshot shows the 'TAG Controls' page in Dynamics 365 Business Central. The page is divided into several sections: 'General', 'Advanced Integration...', and 'IOT'. The 'General' section contains various settings like 'LEAD TIME', 'Requested', 'Start', 'Due By', 'Expiration', 'Calculation Method', 'Allow Meter History', 'Allow Multi-Company', 'Allow WO Union No.', 'Union No.', 'Default Package Rate', 'Default Rate Type', 'Block Job', 'Allow Job Invoicing', and 'Allow UDR Assignment'. The 'Advanced Integration...' section includes 'License Allows Adv In...', 'Integration Type', 'Enable Condition Mo...', 'Equipment List Option', 'Job Journal Dimensio...', 'Allow Multi Item Trac...', 'TAG Plan Selector', 'Setup TAG Basic Values', and 'Dimension Source Co...'. The 'IOT' section is currently empty. A red box highlights the 'Initialize Default Values' button, which sets TAG data in controls, codes, and configurations.

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.

(CMMS and EAM plans can be purchased with increased user counts)

The screenshot shows the 'TAG Controls' interface. The 'TAG Licensing' tab is selected in the ribbon. A red arrow points from this tab to a sub-form titled 'TAG Licensing'. This sub-form has a 'General' section with fields for 'Tag Key', 'Last Validation Date', 'Expiry Date', 'Expiry Reminder', and 'TAG Plan' (set to 'Express'). To the right of these fields are sections for 'Licensed Users', 'Current TAG User Count', 'Employee Portal Users', 'Current TAG Portal Users', 'TAG Mobile Users', and 'Current TAG Mobile Users'. At the bottom of the sub-form is a table titled 'TAG Users' with columns: 'User account #', 'Company #', 'TAG User', 'Employee Portal', and 'TAG Mobile'. The table contains two rows of data, both highlighted in yellow.

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

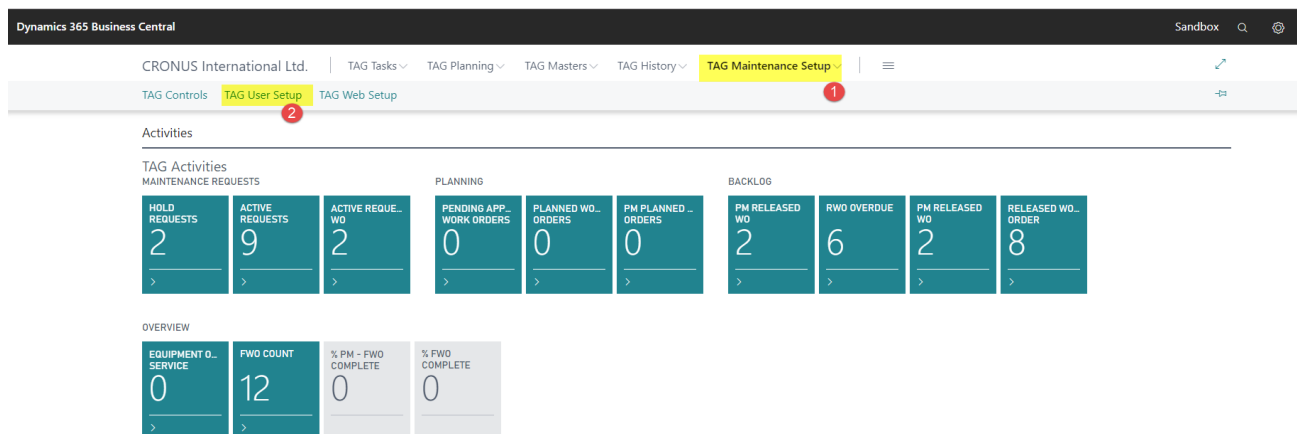
- 1) Click on the new button on the ribbon to create a new Tag User
- 2) Click on the User ID Field to select a BC user
- 3) Enter the User name, select Technician Code, and enter Default Requester Text
- 4) Check yes to the desired tag user maintenance controls
(typical controls are listed below)

List of expected Tag user values

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

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.



Dynamics 365 Business Central

Tag_Sand... TAG USER SETUP

Search + New Edit List Delete Disconnect User Device Assignments... Open in Excel

User ID ↑	User Name	Technician Code	Default Requester	Allow Create WO from Request	Allow Equipm... Trans... Move	Allow Equipm... Change & Ins	Allow Standing Order	Allow Capital Equipm...	Allow WO Status Chan...	Allow WO Delet...	Allow View Costs	Require Approval on Complete	CO App... Req...	Regions Assigned	Enterprise Assigned	View Facilities
ADNM	tag	PERS001	tag	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	-	-	
TAGTEST	tag	PERS001	tag	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	-	-	

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:

The screenshot shows the Dynamics 365 Business Central interface. At the top, the 'TAG Tasks' menu is selected. Below it, the 'TAG Requests' sub-menu is active. A table of TAG Requests is displayed, with columns for No., Request Type, Description, Creation Date, Review Condition, Review Condition Note, Unit, Problem Code, and Status. A red box highlights the table, and a red arrow points to the 'Create Work Request' button in the ribbon.

The screenshot shows the 'TAG Create Work Request' form. The form contains the following fields:

- Description: request for equipment
- Requester: tag
- Enterprise: [dropdown]
- Region: REG001
- Facility: FAC000001
- Technician Code: [dropdown]
- Area: [dropdown]
- Line: [dropdown]
- Equip. Main: [dropdown]
- Equip. Primary: [dropdown]
- Equip. Secondary: [dropdown]
- Equipment Group: [dropdown]
- Equipment Subgroup: [dropdown]
- Equipment ID: ZEQ100001
- Equipment Description: Default Equipment
- Company ID: [dropdown]
- Needed By Date: 5/7/2020
- Priority: Critical
- Maint. Type: ELECT
- Reason Code: [dropdown]
- Problem Code: ELECTRICAL
- Order Type: REQUEST
- Status: NEW REQ
- Work Code: REPAIR
- Failure Code: [dropdown]
- Document Tracking No.: [dropdown]
- No. of open requests: 0
- User service web: [dropdown]

Note: if Tag Plan = express, there are limitations as noted in section 5. Appendix 1.

Create a Work Order from Request:

- Start from **Tag TAG Maint. 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.**

- 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:

Dynamics 365 Business Central

Tag_Sandbox TAG Tasks TAG Planning TAG Masters TAG History TAG Maintenance Setup

TAG Planned Work Orders TAG Pending A..al Work Orders TAG Work Order Status TAG Fault Entry TAG Fault Entry Log

TAG Released Work Orders TAG Requests TAG Failure Codes By Equipment TAG Failure Code Statistics

TAG Requests: All Search New Delete Process Navigate Open in Excel

No.	Request Type	Description	Requester	Creation Date	Review Condition	Review Condition Note	URL, Req...	Problem Code	Status
REQ100001	Work	request for TAG equipment	tag	5/7/2020				ELECTRICAL	NEW R
REQ100002	Work	request for equipment	tag	5/7/2020				ELECTRICAL	NEW R

Links +

(There is nothing to show in this view)

Dynamics 365 Business Central

TAG REQUESTS

REQ100002

Attachments Create Order Additional Description Print

General

No. REQ100002

Description request for equipment

Requester tag

Review Condition

Review Condition Note

Equipment ID ZEQ100001

Equipment Description Default Equipment

Company ID

Technician Code

Enterprise

Region REG001

Facility FAC000001

Area

Line

Equip. Main

Equip. Primary

Equip. Secondary

Locked

TAG CREATE ORDER FROM REQUEST

Options

Select Order Type To Create Released

Copy Additional Description Feedback

Add Request Description a... ☒

Populate additional descrip... ☐

Include Attachments ☐

Approved Request Only ☐

Supervisor

Technician PERS001

Personnel Group ELECTRICAL

Outside Service Providers

Work Procedure

Template

Assign Work Order Status INPROGRESS

OK Cancel

Request Type Work

Failure Code

Additional Description Lines

Requirements

Request Response Assign

Dynamics 365 Business Central

TAG REQUESTS

REQ100002

Attachments Create Order Additional Description Print Request **Work Order** More options

General

No. REQ100002

Description request for equipment

Requester tag

Review Condition

Review Condition Note

Equipment ID ZEQ100001

Equipment Description Default Equipment

Company ID

Technician Code

Enterprise

Region REG001

Facility FAC000001

Area

Line

Equip. Main

Equip. Primary

Equip. Secondary

Locked

TAG RELEASED WORK ORDER

Released · RWO100001

Comments All Work Order Feedback Work Order Packet All Attachments Consumption

General

No. RWO100001

UDN UDN100002

Description request for equipment

Actual Time 0.00

Equipment ID ZEQ100001

Maint. Type ELECT

Problem Code ELECTRICAL

Work Code REPAIR

Priority Critical

Priority Rank

Status INPROGRESS

Send Notification

Order Type REQUEST

Parent No. RWO100001

No. of Child Work Or...

Temperature 0

Temperature Measure Fahrenheit

Shortcut Dimension 1...

Shortcut Dimension 2...

Project Contract No.

Contract Type UDN

Post Sales Shipment

Lock Unit Price

Union No.

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.

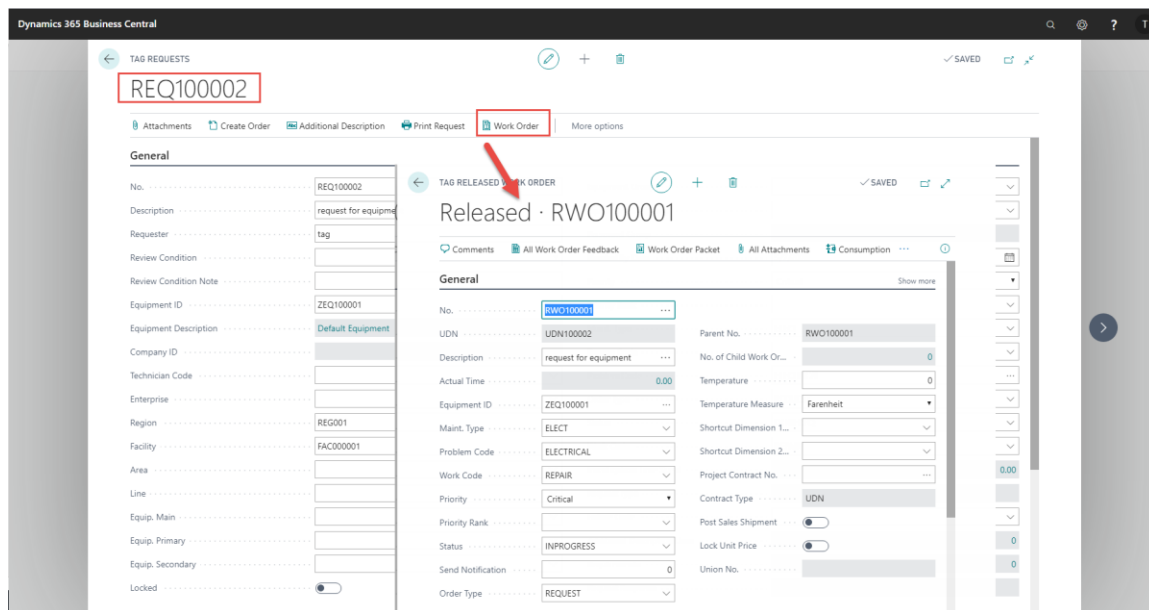
Technician on RWO line check: the Work order line must have a technician code. To resolve go to the WO lines and check that each line has a technician code.

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



Dynamics 365 Business Central

← TAG RELEASED WORK ORDER

Released · RWO100001

Comments All Work Order Feedback Work Order Packet All Attachments Consumption Consume Timesheet **Complete** More options

Equipment ID ZEQ100001 Temperature Measure Fahrenheit

Maint. Type ELECT Shortcut Dimension 1 Code

Problem Code ELECTRICAL Shortcut Dimension 2 Code

Work Code REPAIR Project Contract No.

Priority Critical Contract Type UDN

Priority Rank Post Sales Shipment

Status INPROGRESS Lock Unit Price

Send Notification 0 Union No.

Order Type REQUEST

Service

Lines Manage More options

Fin...	Step No.	Description	Actual Time	Technician Code	Equipment ID	Company ID	Equipment Description	Equip. Serial No.	Equipment Group	Equipment Subgroup	Standard Time
→		request for equipment	1.50	PLK5000	ZEQ100001		Default Equipment				0.00

Dynamics 365 Business Central

← TAG REQUESTS

REQ100002

Attachments Create Order Additional Description Print Request **Work Order** More options

General

No.	REQ100002	Equipment Subgroup	
UDN	UDN100002	Personnel Group	
Description	request for equipment	Needed By Date	5/7/2020
Requester	tag	Priority	Critical
Review Condition		Priority Rank	
Review Condition Note		Maint. Type	ELECT
Equipment ID	ZEQ100001	Reason Code	
Equipment Description	Default Equipment	Problem Code	ELECTRICAL
Company ID		Order Type	REQUEST
Technician Code		Status	DONEREQ
Enterprise		Work Code	REPAIR
Region	REG001	Investigation Time Spent	0.00
Facility	FAC000001	Request Type	Work
Area		Work Order Type	Finished
Line		Work Order No.	FWO100001
Equip. Main		Failure Code	
Equip. Primary		Additional Description Lines	0
Equip. Secondary		Requirements	0
Locked		Request Response	Completed

Dynamics 365 Business Central

TAG FINISHED WORK ORDER

FWO100001

Comments All Feedback All Attachments Statistics **Tracking** Usage Report Finished Work Order More options

General

No. FWO100001 Actual Time 1.50

UDN UDN100002 <Temperature> 0

Maint. Type ELECT Temperature Measure Fahrenheit

Problem Code ELECTRICAL Weather Conditions

Work Code REPAIR Reason Code

Priority Critical From Work Order No. RWO100001

Priority Rank Consumption WO

Status INPROGRESS Capital Expenditure

Control124040064 Company

Description request for equipment

Service

Customer Signature

Lines Manage More options

Original WO Summary

Original Work Order No. RWO100001

Consumption WOs 0

Original WO Active No

Original WO Exp. Usage 0.00

Original WO Exp. Time 0.00

Selected WO Exp. Usage 0.00

Selected WO Exp. Time 0.00

Total Posted Usage 0.00

Total Posted Time 0.00

TAG Order Tracking

UDN UDN100002

TAG Document Tracking Subform

From Document No.	Document Type	Document No.	UDN	Action Type	Date of Action	Time of Action	User ID
REQ100002	Work Request	REQ100002	UDN100002	Created	5/7/2020	6:44:16 PM	TAGTEST
REQ100002	Released O...	RWO100001	UDN100002	WR to RO	5/7/2020	6:51:43 PM	TAGTEST
RWO100001	Finished O...	FWO100001	UDN100002	Posted	5/7/2020	8:30:41 PM	TAGTEST

Dynamics 365 Business Central

Tag Sandbox TAG Tasks TAG Planning TAG Masters **TAG History** TAG Maintenance Setup

TAG Finished Work Requests TAG Finished Work Line Detail TAG Inventory Ledger Entries TAG OSP Tool Entries

TAG Finished Work Orders TAG Personnel Ledger Entries TAG Inventory Tool Entries TAG Other Cost Tool Entries

TAG Finished Work Requests All Search Delete Tracking Additional Description Open in Excel

No.	Description	Region	Facility	Area	Line	Equip. Main	Equip. Primary	Equip. Secondary	Priority Rank
REQ100002	request for equipment	REG001	FAC000001						

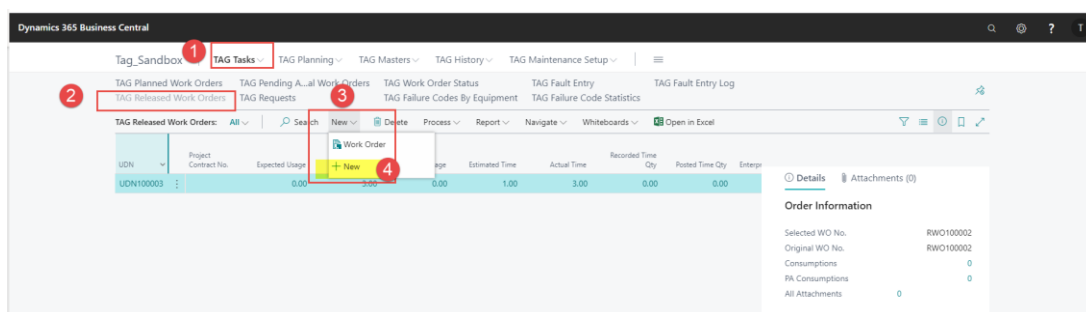
Links +

(There is nothing to show in this view)

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.

Create a manual RWO



Dynamics 365 Business Central

TAG RELEASED WORK ORDER

Released

Comments | All Work Order Feedback | Work Order Packet | All Attachments | Consumption | Consume Timesheet | Complete | More options

General

No. RWO100002
UDN UDN100003
Description manual work order for equipment
Actual Time 0.00
Equipment ID ZEQ100001
Maint. Type MECH
Problem Code
Work Code
Priority Routine
Priority Rank
Status NEW
Send Notification 0
Order Type CM

Parent No. RWO100002
No. of Child Work Orders 0
Temperature 0
Temperature Measure Fahrenheit
Shortcut Dimension 1 Code
Shortcut Dimension 2 Code
Project Contract No.
Contract Type UDN
Post Sales Shipment
Lock Unit Price
Union No.

Service

Lines Manage More options

Fin...	Step No.	Description	Actual Time	Technician Code	Equipment ID	Company ID	Equipment Description	Equip. Serial No.	Equipment Group	Equipment Subgroup	Standard Time
→	WP100002	Standard Inspection Work Task	0.00		ZEQ100001		Default Equipment				0.00
<p>No. 1 Description Work Code Equipment ID Equip. Serial No.</p> <p>WP100001 Meter Reading</p> <p>→ WP100002 Standard Inspection Work Task INSPECT</p> <p>+ New Select from full list</p>											

Dynamics 365 Business Central

TAG RELEASED WORK ORDER

Released · RWO100002

Comments | All Work Order Feedback | Work Order Packet | All Attachments | Consumption | Consume Timesheet | Complete | Actions | Navigate | Report | Fewer options

Fin...	Step No.	Description	Actual Time	Technician Code	Equipment ID	Company ID	Equipment Description	Equip. Serial No.	Equipment Group	Equipment Subgroup	Standard Time
→	WP100002	Standard Inspection Work Task	1.00	PERS001	ZEQ100001		Default Equipment				0.00
		Manual line WO description	2.00	PERS001	ZEQ100001		Default Equipment				0.00

Equipment

Default Equipment REG001 FAC000001

Scheduled

Supervisor Code
Personnel Group ELECTRICAL
Technician Code PERS001
OSP No.
Order Date 5/7/2020
Document Date 5/7/2020
Expiration Date 5/2/2021
Requested Service Date 5/8/2020

Due By Date 5/17/2020
Starting Date 5/7/2020
Starting Time 8:53:18 PM
Ending Date
Ending Time
Standard Time 0.00
Estimated Time 1.00
Total Open Time 1.00

Dynamics 365 Business Central

Released · RWO100002

Comments All Work Order Feedback Work Order Packet All Attachments Consumption Consume Timesheet Complete Actions Navigate Report Fewer options

General

No. RWO100002
 UDN UD100003 Parent No. RWO100002
 Description manual work order for equipment No. of Child Work Orders 0

Actual Time Search + New Edit List Delete Add New WO Line Requirement Requisition Update Actual Quantity

Equipment EDIT - TAG USAGE ENTRY FOR WORK ORDER

Maint. Type

Problem Code

Work Code Source Type Source No. Source Line No. Type No. Unit of Measure Expected Quantity Actual Quantity Expected Unit Cost

Priority Header RWO100002 0 Consumable CON100001 0 3 5.00

Priority Rank

Status

Send Notification

Order Type

Service

Lines Manage More options

Technician Company ID Eq

Details Attachments (0)

Order Information

Selected WO No. RWO100002
 Original WO No. RWO100002
 Consumptions 0
 PA Consumptions 0
 All Attachments 0

USAGE

Expected Usage 0.00
 Utilisation 0.00
 Posted Usage 0.00

TIME

Estimated Time 1.00
 Actual Time 3.00
 Recorded Time 0.00
 Posted Time 0.00

Header Information

Equipment ZEQ100001
 Requirements 0
 Qualifications 0
 Feedback 0
 Attachments 0
 Comments 0
 Test Results 0
 Meter History 0

Dynamics 365 Business Central

Released · RWO100002

Comments All Work Order Feedback Work Order Packet All Attachments Consumption Consume Timesheet Complete Actions Navigate Report Fewer options

Dimensions All Qualifications Usage Statistics Header Equipment Card

No. RWO100002
 UDN UD100003 Parent No. RWO100002
 Description manual work order for equipment No. of Child Work Orders 0
 Actual Time 3.00 Temperature Fahrenheit
 Equipment ID ZEQ100001 Temperature Measure Fahrenheit

Maint. Type MECH

Problem Code

Work Code

Priority Routine

Priority Rank

Status NEW

Send Notification

Order Type CM

Service

Lines Manage More options

Technician Company ID Eq

Order Information

Selected WO No. RWO100002
 Original WO No. RWO100002
 Consumptions 0
 PA Consumptions 0
 All Attachments 0

USAGE

Expected Usage 0.00
 Utilisation 3.00
 Posted Usage 0.00

TIME

Estimated Time 1.00
 Actual Time 3.00
 Recorded Time 0.00
 Posted Time 0.00

Header Information

Equipment ZEQ100001
 Requirements 1
 Qualifications 0
 Feedback 0
 Attachments 0
 Comments 0
 Test Results 0
 Meter History 0

TAG RELEASED ORDER STATISTICS

Released · RWO100002

	ESTIMAT.	ACTUAL	PA COST	POSTED	TOTAL AC.	VARIANCE	PERCENT.
Personnel Cost	28.00	84.00	0.00	0.00	84.00	56.00	200.00
Package Cost	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tool Cost	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Inventory Cost	0.00	15.00	0.00	0.00	15.00	15.00	0.00
OSP Cost	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Cost	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Cost	28.00	99.00	0.00	0.00	99.00	71.00	253.57

	COUNT	PERC.	STAN.	ESTIM.	ACTU.	RECD.	POSTE.	POSTE.	PERC.
Open	2	100.00	0.00	1.00	3.00				
Closed	0	0.00	0.00	0.00	0.00				
Total	2	0.00	0.00	1.00	3.00	0.00	0.00	0.00	300.00

OVERIDES

Actual Time 0.00
 Cost 0.00

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

Dynamics 365 Business Central

Tag_Sandbox **1 TAG Tasks** TAG Planning TAG Masters TAG History TAG Maintenance Setup

2 TAG Planned Work Orders TAG Pending A...al Work Orders TAG Work Order Status TAG Fault Entry TAG Fault Entry Log
TAG Released Work Orders TAG Requests TAG Failure Codes By Equipment TAG Failure Code Statistics

TAG Released Work Orders: All Search New Delete Process Report Navigate Whiteboards Open in Excel

UDN	Project Contract No.	Expected Usage	Actual Usage	Posted Usage	Estimated Time	Actual Time	Recorded Time Qty	Posted Time Qty	Enterpr
3 UDN100003		0.00	3.00	0.00	1.00	3.00	0.00	0.00	

Details Attachments (0)

Order Information

Selected WO No. RWO100002
Original WO No. RWO100002
Consumptions 0
PA Consumptions 0
All Attachments 0

USAGE

Expected Usage 0.00
Utilisation 3.00
Posted Usage 0.00

TIME

Estimated Time 1.00
Actual Time 3.00
Recorded Time 0.00
Posted Time 0.00

Dynamics 365 Business Central

TAG RELEASED WORK ORDER

Released · RWO100002

Comments All Work Order Feedback Work Order Packet All Attachments Consumption Consume Timesheet Complete Actions Navigate Report Fewer options

Lines Manage More options

Fin...	Step No.	Description	Actual Time	Technician Code	Equipment ID	Company ID No.	Equipment Description	Eq No.
→	WP100002	Standard Inspection Work Task	1.00	PERS001	ZEQ100001		Default Equipment	
		Manual line WO description	2.00	PERS001	ZEQ100001		Default Equipment	

5

Equipment

Default Equipment REG001 FAC00001

Scheduled Show more

Supervisor Code Due By Date 5/17/2020

Personnel Group ELECTRICAL Starting Date 5/7/2020

Technician Code PERS001 **4** Starting Time 8:53:18 PM

OSP No. Ending Date

Order Date 5/7/2020 Ending Time

Document Date 5/7/2020 Created Time

Details Attachments (0)

Order Information

Selected WO No. RWO100002
Original WO No. RWO100002
Consumptions 0
PA Consumptions 0
All Attachments 0

USAGE

Expected Usage 0.00
Utilisation 3.00
Posted Usage 0.00

TIME

Estimated Time 1.00
Actual Time 3.00
Recorded Time 0.00
Posted Time 0.00

Header Information

Equipment ZEQ100001
Requirements 1
Qualifications 0
Feedback 0
Attachments 0
Comments 0
Test Results 0
Meter History 0

Dynamics 365 Business Central

TAG RELEASED WORK ORDER

Released · RWO100002

EDIT - TAG USAGE ENTRY FOR WORK ORDER

Source Type	Source No.	Source Line No.	Type	No.	Expected Quantity	Actual Quantity	Expected Unit Cost	Actual Unit Cost
Header	RWO100002	0	Consumable	CON100001	0	3	5.00	5.00

7

8

Close

Equipment >

Scheduled

Supervisor Code

Personnel Group

Technician Code

OSP No.

Order Date

Document Date

Due By Date

Starting Date

Starting Time

Ending Date

Ending Time

Standard Time

Usage

Expected Usage

Utilisation

Posted Usage

TIME

Estimated Time

Actual Time

Recorded Time

Posted Time

Header Information

Equipment

Requirements

Qualifications

Feedback

Attachments

Comments

Test Results

Meter History

Dynamics 365 Business Central

TAG RELEASED WORK ORDER

Released · RWO100003

Comments

All Work Order Feedback

Work Order Packet

All Attachments

Consumption

Consume Timesheet

Complete

Actions

Navigate

Report

Fewer options

UDN

UDN100003

Description

manual work order for equipment

Actual Time

3.00

Equipment ID

ZEQ100001

Maint. Type

MECH

Problem Code

Work Code

Priority

Routine

Priority Rank

Status

NEW

Send Notification

0

Order Type

CM

Parent No.

RWO100003

No. of Child Work Orders

0

Temperature

0

Post Sales Shipment

Lock Unit Price

Union No.

Complete Order No. RWO100003?

Yes

No

Order Information

Selected WO No.

RWO100003

Original WO No.

RWO100002

Consumptions

0

PA Consumptions

0

All Attachments

0

Usage

Expected Usage

0.00

Utilisation

0.00

Posted Usage

3.00

TIME

Estimated Time

1.00

Actual Time

3.00

Recorded Time

0.00

Posted Time

3.00

Header Information

Equipment

ZEQ100001

Requirements

1

Qualifications

0

Feedback

0

Attachments

0

Comments

0

Test Results

0

Meter History

0

Lines

Manage

More options

Fin.	Step No.	Description	Actual Time	Technician Code	Equipment ID	Company ID	Equipment Description	Eq. No.
→	WP100002	Standard Inspection Work Task	1.00	PERS001	ZEQ100001		Default Equipment	

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:

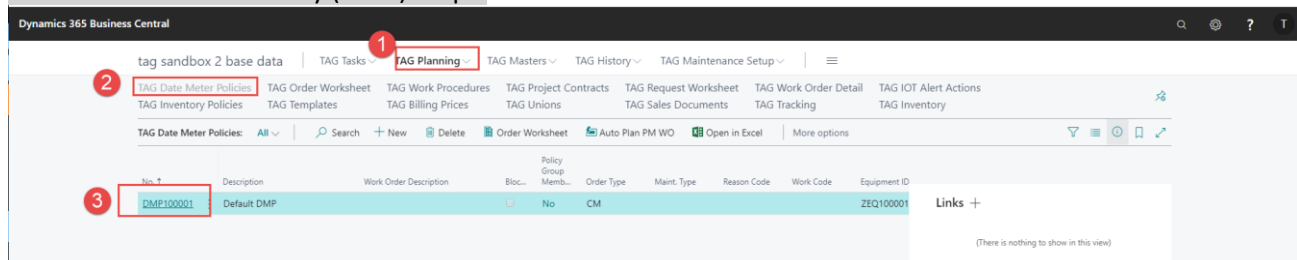
if reviewing under Tag Plan = express there is a limitation on number of DMP records (1)

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:



The screenshot shows the Dynamics 365 Business Central interface. At the top, the 'TAG Planning' menu is highlighted with a red circle and the number 1. Below it, the 'TAG Date Meter Policies' menu is highlighted with a red circle and the number 2. In the table below, the record 'DMP100001' is highlighted with a red circle and the number 3. The table has columns for No., Description, Work Order Description, Bloc..., Policy Group Memb..., Order Type, Maint. Type, Reason Code, Work Code, and Equipment ID. The 'DMP100001' record has a description of 'Default DMP' and an equipment ID of 'ZEG100001'.

No.	Description	Work Order Description	Bloc...	Policy Group Memb...	Order Type	Maint. Type	Reason Code	Work Code	Equipment ID
DMP100001	Default DMP		No	CM					ZEG100001

Dynamics 365 Business Central

TAG DATE METER MAINTENANCE POLICY

DMP100001

Equipment Auto Plan PM WO Statistics More options

General Show more

No. **DMP100001** Reason Code **NEW**

Description **Default DMP** Problem Code **CM**

Work Order Description **NEW** Order Type **NEW**

Equipment ID **ZEQ100001** Status **NEW**

Member of Group **No** Work Code **NEW**

Priority **Routine** Blocked **OFF**

Priority Rank **ALLOW DUPLICATES IF NEWEST:**

Job No. **Released Order Older Than Days: 0**

Maint. Type **Planned Order Older Than Days: 0**

TAG Lines Manage More options

Work Procedure Step	Description	Personnel Group	Technician Code	Equipment ID	Company ID	Equipment Description	Res. Input Req.	Unit of Measure
→	DMP Task Line	ELECTRICAL	PERS001	ZEQ100001		Default Equipment		

Header Information

Equipment **ZEQ100001**

Requirements **0**

Qualifications **0**

Attachments **0**

METER CHARACTERISTICS

Type **Input Type**

Input Type **Actual**

AVERAGE:

Per Day **0**

Per Hour **0**

OVERWRITE:

Per Day **0**

Expiration Date **0**

Per Hour **0**

OPERATING PARAMETERS:

Duty Type Override **0**

Hours per Day **0**

Line Information

Equipment **ZEQ100001**

WP **0.00**

Master WP Est Time Qty **0**

Sub Steps **0**

Requirements **0**

Dynamics 365 Business Central

TAG DATE METER MAINTENANCE POLICY

DMP100001

Equipment Auto Plan PM WO Statistics More options

Assigned

Personnel Group **PERS001** Supervisor Code **OSP No.**

Values

Date Meter Type **Date**

Use Specific Interval **OFF**

Block On Interval Specific Comp... **OFF**

DATE SCHEDULING

Activate Date **ON**

Occurrence Interval **1W**

Fixed Recurrence **OFF**

Next Service Date **5/14/2020**

Last Service Date **5/7/2020**

Last Service Time

METER SCHEDULING

Activate Meter **OFF**

Meter Type **0**

Occurrence Interval **0**

Meter Fixed Recurrence **OFF**

Next Meter Service **0**

Last Service Meter **0**

Likely Due Date **5/14/2020**

Override Average Per Day **0**

Current Meter **200**

Current Meter Date **5/14/2020**

Header Information

Equipment **ZEQ100001**

Requirements **0**

Qualifications **0**

Attachments **0**

METER CHARACTERISTICS

Type **Input Type**

Input Type **Actual**

AVERAGE:

Per Day **0**

Per Hour **0**

OVERWRITE:

Per Day **0**

Expiration Date **0**

Per Hour **0**

OPERATING PARAMETERS:

Duty Type Override **0**

Hours per Day **0**

Line Information

Equipment **ZEQ100001**

WP **0.00**

Master WP Est Time Qty **0**

Sub Steps **0**

Requirements **0**

Tracking

Preventative Maintenance:

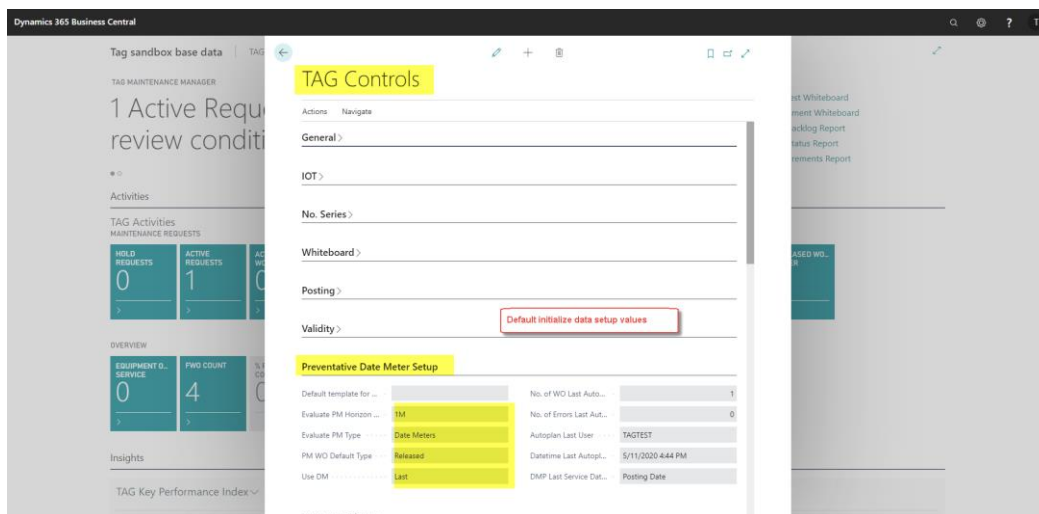
Steps to create a PM WO from DMP and Complete

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 MetersClick 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

Dynamics 365 Business Central

TAG DATE METER MAINTENANCE POLICY

DMP100001

Equipment **Auto Plan PM WO** Statistics More options

Fixed Recurrence: 5/13/2020
Next Service Date: 5/13/2020
Last Service Date: 5/5/2020
Last Service Time: 5/5/2020

Tracking

Creation Date: 5/7/2020
Created By: ADMIN
Last Modified Date: 5/7/2020
Last Modified By: ADMIN

Planned Work Orders: 0
Released Work Orders: 0
Finished Work Orders: 0
AutoPlan PM Error Test: 0
AutoPlan PM Error Datetime: 0

Lead Time: 0

AUTOPLAN PM WORK ORDER

Saved Settings

Changes to the options and filters below will be saved only to 'Last used options and filters'

Use default values from: Last used options and filters

Options

Policy No. Filter: DMP100001
Evaluate Through Date: 6/11/2020
Evaluate PM Type: Date Meters

Exclude Policies with: 0
Planned Order: 0
Released Order: 0
Duty Type: Continuous
DUTY TYPE STATUS: 0
Active: 0
Running: 0
Idle: 0
Standby: 0
New: 0
Unchecked: 0

Schedule... OK Cancel

Dynamics 365 Business Central

TAG DATE METER MAINTENANCE POLICY

DMP100001

Equipment **Auto Plan PM WO** Statistics More options

DATE SCHEDULING

Activate Date: 5/7/2020
Occurrence Interval: TW
Fixed Recurrence: 5/13/2020
Next Service Date: 5/13/2020
Last Service Date: 5/11/2020
Last Service Time: 4:37:43 PM

Occurrence Interval: 0
Next Meter Service: 0
Last Service Meter: 0
Likely Due Date: 5/13/2020
Override Average Per Day: 0
Current Meter: 0
Current Meter Date: 5/8/2020

Header Information

Equipment: ZEQ100001
Requirements: 0
Qualifications: 0
Attachments: 0

METER CHARACTERISTICS

Type: Actual
Input Type: 0
AVERAGE: 0
Per Day: 0
Per Hour: 0
OVERRIDE: 0

Tracking

Creation Date: 5/7/2020
Created By: ADMIN
Last Modified Date: 5/7/2020
Last Modified By: ADMIN

Planned Work Orders: 0
Released Work Orders: 1
Finished Work Orders: 1
AutoPlan PM Error Test: 0

TAG Work Order List

No.	Date	Description	Estimated Cost	Actual Cost	Status
1	5/13/2020	DMP100001	0.00	0.00	Open in Detail

Dynamics 365 Business Central

TAG RELEASED WORK ORDER

Released · RWO100008

Comments | All Work Order Feedback | Work Order Packet | All Attachments | Consumption | Consume Timesheet | **Complete** | Actions | Navigate | Report | Fewer options

General > RWO100008 | **Default DMP** | ZEQ100001 | Routine | NEW

Service >

Lines | Manage | More options

File	Step No.	Description	Actual Time	Technician Code	Equipment ID	Company ID	Equipment Description	Equip. Serial No.
→		DMP Test Line	0.00	PER0001	ZEQ100001		Default Equipment ad	

Equipment > Default Equipment ad | REG001 | RAC000001

Scheduled

Supervisor Code: Due By Date: 5/28/2020

Personnel Group: Starting Date: 5/18/2020

Technician Code: PER0001 Starting Time: 4:44:37 PM

OSP No.: Ending Date:

Order Date: 5/11/2020 Ending Time:

Document Date: 5/11/2020 Standard Time: 0.00

Expiration Date: 5/13/2021 Estimated Time: 0.00

Requested Service Date: 5/18/2020 Total Step Time: 0.00

Tracking

Order Source: Generator Creation Date: 5/11/2020

Order Source Type: Released Last Modified By: TAGTEST

Order Source No.: RWO100008 Last Modified Date: 5/11/2020

UDN: LCN100009 Policy Type: Discharge

Vendor Invoice: Policy No.: DMP100001

Customer Invoice: Current Posted Meter Reading: 0.00

External Document No.: Current Posted Meter Reading: 5/8/2020

Requester: DMP100001 RWO Batch posting error text:

Order Information

Selected WO No.: RWO100008

Original WO No.: RWO100008

Consumptions: 0

PA Consumptions: 0

All Attachments: 0

USAGE

Expected Usage: 0.00

Utilisation: 0.00

Posted Usage: 0.00

TIME

Estimated Time: 0.00

Actual Time: 0.00

Recorded Time: 0.00

Posted Time: 0.00

Header Information

Equipment: ZEQ100001

Requirements: 0

Qualifications: 0

Feedback: 0

Attachments: 0

Order Information

Selected WO No.: RWO100008

Original WO No.: RWO100008

Consumptions: 0

PA Consumptions: 0

All Attachments: 0

USAGE

Expected Usage: 0.00

Utilisation: 0.00

Posted Usage: 0.00

TIME

Estimated Time: 0.00

Actual Time: 0.00

Recorded Time: 0.00

Posted Time: 0.00

Header Information

Equipment: ZEQ100001

Requirements: 0

Qualifications: 0

Feedback: 0

Attachments: 0

Comments: 0

Test Results: 0

Meter History: 1

Dynamics 365 Business Central

TAG DATE METER MAINTENANCE POLICY

DMP100001

Equipment | Auto Plan PM WO | Statistics | More options

Activate Date: Occurrence Interval: TW

Meter Fixed Recurrence: Next Meter Service: 0

Fixed Recurrence: Last Service Meter: 0

Next Service Date: 5/18/2020 Likely Due Date: 5/13/2020

Last Service Date: 5/11/2020 Override Average Per Day: 0

Last Service Time: 4:37:43 PM Current Meter: 0

Current Meter Date: 5/8/2020

Tracking

Creation Date: 5/7/2020 Take OOS: 0

Created By: ADNM OOS Days: 0

Last Modified By: OOS Hours: 0

Last Modified By: OOS Minutes: 0

Planned Work Orders: 0 Use Step Time: 0

Released Work Orders: 0 Step Days: 0

Finished Work Orders: 1 Step Hours: 0

AutoPlan PM Error Text: Step Minutes: 0

AutoPlan PM Error Datetime:

Header Information

Equipment: ZEQ100001

Requirements: 0

Qualifications: 0

Attachments: 0

METER CHARACTERISTICS

Type: Input Type: Actual

AVERAGE:

Per Day: 0

Per Hour: 0

OVERRIDE:

Per Day: 0

Expiration Date: 0

Per Hour: 0

OPERATING PARAMETERS:

Duty Type Override: 0

Hours per Day: 0

Line Information

Equipment: ZEQ100001

WP: 0

Master WP Est Time Qty: 0.00

Sub Steps: 0

Requirements: 0

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:

Step 1: TAG History Section

The first screenshot shows the Dynamics 365 Business Central interface. The 'TAG History' section is selected in the top navigation bar. The 'TAG Finished Work Orders' menu item is highlighted. A table of work orders is displayed with columns: UDN, No., Posting Date, Requested Service Date, Description, Project Contract No., Expected Usage, Actual Usage, Actual Time, and Enterprise. The work order FWO100002 is selected.

Step 2: FWO100002 Card

The second screenshot shows the 'FWO100002' card. The 'Statistics' button in the ribbon is highlighted. The card displays various fields including UDN, Maint. Type, Problem Code, Work Code, Priority, Priority Rank, Status, Control, Description, Actual Time, Temperature Measure, Weather Conditions, Reason Code, From Work Order No., Consumption WO, Capital Expenditure, Company, Post Sales Shipment, and Union No.

Dynamics 365 Business Central

Tag s TAG FINISHED WORK ORDER TAG FINISHED TAG FINISHED TAG FINISHED

UDN UDNI UDNI UDNI UDNI

General

No. FWO10000 TAG FINISHED WORK ORDER

UDN UDNI UDNI UDNI UDNI

Maint. Type

Problem Code

Work Code

Priority Rank

Status

Control 1249400064

Description

Service

Lines Manage

TAG FINISHED ORDER STATISTICS

FWO100002

Costs

	ORIGINAL	RWO + PA	SELECTE	ACTUAL C.	ALL POST	VARIANCE	PERCENT
Personnel Cost	0.00	0.00	28.00	84.00	84.00	56.00	300.00
Original Pack	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Tool Cost	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Item Cost	0.00	0.00	0.00	15.00	15.00	15.00	0.00
OSP Cost	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Other Cost	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Cost	0.00	0.00	28.00	99.00	99.00	71.00	0.00

Quantities

	COUNT	STANDARD TIME	ESTIMATED TIME	ACTUAL TIME	PERCENTAGE
Open	2	0.00	1.00	3.00	100.00
Closed	0	0.00	0.00	0.00	0.00
Total	2	0.00	1.00	3.00	

Sales Prices

Details Attachments (0)

Original WO Summary

Original Work Order No. RWO100002

Consumption WO's 0

Original WO Active No

Original WO Exp. Usage 0.00

Original WO Exp. Time 0.00

Selected WO Exp. Usage 0.00

Selected WO Exp. Time 1.00

Total Posted Usage 3.00

Total Posted Time 3.00

Header Information

Equipment ZEQ100001

Requirements 1

Qualifications 0

Feedback 0

Attachments 0

Comments 0

Line Information

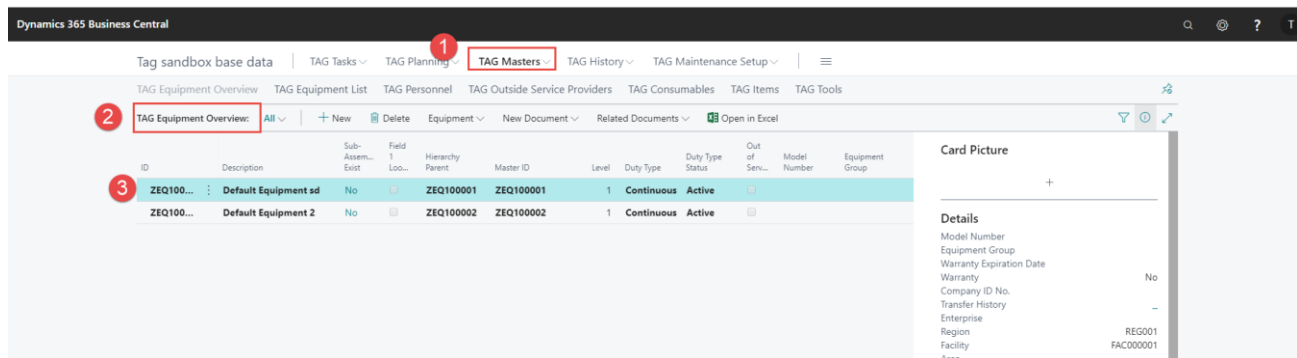
Equipment ZEQ100001

Reference Equipment Statistics

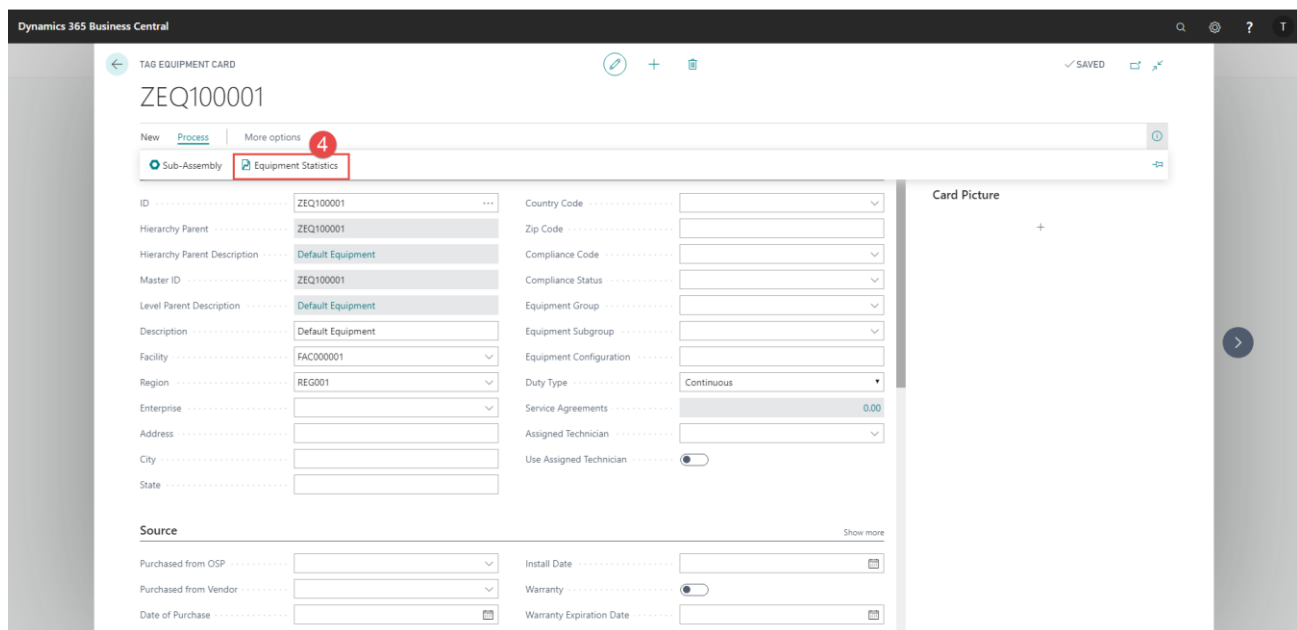
- Start from **TAG Maint. Manager** Role Center Profile.
- Go to the **Tag Masters** Section and click **TAG Equipment Overview** menu.
- Click on the **ID** field to open the equipment card.
- In the ribbon, click on **Navigate** and then on **statistics->Equipment Statistics** menu to open the Equipment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

Steps:

Select Equipment:



The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'TAG sandboxes base data', 'TAG Tasks', 'TAG Planning', 'TAG Masters' (highlighted with a red circle 1), 'TAG History', and 'TAG Maintenance Setup'. Below this, the 'TAG Equipment Overview' ribbon is active, showing a table of equipment. The table has columns for ID, Description, Sub-Assembly, Field, Hierarchy, Master ID, Level, Duty Type, Duty Status, Out of Service, Model Number, and Equipment Group. Two rows are visible: 'ZEQ100001' and 'ZEQ100002'. A red circle 2 highlights the 'TAG Equipment Overview' button, and a red circle 3 highlights the 'ZEQ100001' row. To the right, the 'Card Picture' section shows details for the selected equipment, including Model Number, Equipment Group, Warranty Expiration Date, and other attributes.



The screenshot shows the Dynamics 365 Business Central 'TAG EQUIPMENT CARD' for 'ZEQ100001'. The card is divided into several sections. The 'Sub-Assembly' section is active, showing a table of equipment with columns for ID, Hierarchy Parent, Hierarchy Parent Description, Master ID, Level Parent Description, Description, Facility, Region, Enterprise, Address, City, and State. The 'Equipment Statistics' button is highlighted with a red circle 4. Below this, the 'Source' section shows fields for 'Purchased from OSP', 'Purchased from Vendor', 'Date of Purchase', 'Install Date', 'Warranty', and 'Warranty Expiration Date'. The 'Card Picture' section on the right shows details for the selected equipment, including Model Number, Equipment Group, Warranty Expiration Date, and other attributes.

Open Equipment statistics:

Dynamics 365 Business Central

Tag s TAG EQUIPMENT CARD TAG EQUIPMENT STATISTICS

ZEQ100000 ZEQ100001

General

ID Hierarchy Parent Master ID Level Parent Description Description Facility Region Enterprise Address City State

Source

Purchased from OSP Purchased from Vendor Date of Purchase

Equipment Hierarchy Analysis **Equipment Analysis** More options

Element

First Posted FO 5/7/2020 LAST POSTED FO 5/11/2020 ELAPSED MONTHS 0.13

CONTROL1000000204

Lifetime

	TOTALS	AVERAGE	Monthly	ACTIVE W...	TOTALS	AVERAGE	Each
FO Count	4	30.77	Monthly	Planned ...	0.00	0.00	Each
Actual Time	6.00	46.15	Monthly	Released ...	39.00	19.50	Each
Standard Time	2.00	15.38	Monthly	Pending ...	0.00	0.00	Each
Estimated TL...	4.00	46.15	Monthly	DM Poli...	0.00	0.00	Each
Finished Ord...	366.00	2,815.38	Monthly	Service ...	0.00		
0		91.50	Each				

Current Year

	COUNT	BUDG...	ACTU...	PERC...	PRIOR...	COUNT	BUDG...	ACTU...	PERC...
Planned	1	0.00	0.00	0.00	Plann...	1	0.00	0.00	0.00
Unplanned	2	0.00	183.00	0.00	Unpl...	2	0.00	183.00	0.00
Total	3	0.00	183.00	0.00	Total	3	0.00	183.00	0.00
Personne...			168.00	0.00	Perso...			168.00	0.00
Tool Costs			0.00	0.00	Tool ...			0.00	0.00
Inventory			15.00	0.00				15.00	0.00

Prior Year

Equipment Analysis:

Dynamics 365 Business Central

Tag s TAG EQUIPMENT TAG EQUIPMENT ANALYSIS

ZEQ1 ZEQ1

General

ID Hierarchy Parent Master ID Level Parent Description Description Facility Region Enterprise Address City State

Source

Purchased from OSP Purchased from Vendor Date of Purchase

Equipment Analysis

+ New Edit List Delete Open in Excel More options

	COUNT	PERCENTAGE	STANDARD	ESTIMATED	ACTUAL
Operator	6	100.00	2.00	4.00	6.00
System	0	0.00	0.00	0.00	0.00
Total	6	100.00	2.00	4.00	6.00

	COUNT	PERC...	STAN...	ESTIM...	ACTU...	DAY A...	MONT...	YEAR ...
With	3	50.00	0.00	2.00	2.50	0.75	23.08	300.00
Without	3	50.00	2.00	2.00	3.50	0.75	23.08	300.00
Total	6	100.00	2.00	4.00	6.00			

Current Year

Planned Unplanned Total Personnel... Tool Costs

*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](tel:+14504195559) 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)

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:

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-WPSS	Sub Steps	Prefix=WPSS	Default = yes, Manual = yes	WPSS-00001	WPSS-00000
Tag-Req	Request	Prefix = Req	Default = yes, Manual = no	Req-00001	Req-00000
Tag-PWO	Planned work order	Prefix = PWO	Default = yes,	PWO-00001	PWO-00000

Tag-RWO	Released work order	Prefix = RWO	Manual = no Default = Yes,	RWO-00001	RWO-00000
Tag-FWO	Finished work order	Prefix = FWO	Manual = no Default = yes,	FWO-00001	FWO-00000
Tag-Prj	Tag Project Contract	Prefix=PRJ	Manual = no Default=Yes, Manual=Yes	PRJ-00001	PRJ-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.

TAG Controls

Actions: Navigate

General >

IOT >

No. Series

Technician Nos.		Work Procedure Nos.	TAG-WP	Released WO Nos.	TAG-RWO
Equipment Nos.	TAG-EQ	Maint. Substep Nos.	TAG-WPSS	Finished WO Nos.	TAG-FWO
Facility Nos.		Template Nos.	TAG-TEMP	Fault Entry Nos.	
Consumable Nos.	TAG-CON	Date Meter Policy Nos.	TAG-DMP	Fault Log Nos.	
OSP Nos.	TAG-OSP	Inventory Policy Nos.		Project Contract Nos.	TAG-PRJ
Tool Nos.	TAG-TOOL	Request Nos.	TAG-REQ		
Document Tracking Nos.	TAG-UDN	Planned WO Nos.	TAG-PWO		

Whiteboard >

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

Actions Navigate

General

IOT

No. Series

Technician Nos.

Equipment Nos. 1

Facility Nos.

Consumable Nos.

OSP Nos.

Tool Nos.

Document Tracking Nos.

Whiteboard

Posting

Work Procedure Nos.

Maint. Substep Nos.

Code	Description
TAG-CON	Consumable
TAG-DMP	Datameter Policies
TAG-EQ	Equipment
TAG-FAC	Facilities
TAG-FWO	Finished Work Order
TAG-PRJ	Project Contract

[+ New](#) 2 [Select from full list](#)

Dynamics 365 Business Central

TAG Controls

Actions Navigate

General

IOT

No. Series

Technician Nos.

Equipment Nos.

Facility Nos.

Consumable Nos.

OSP Nos.

Tool Nos.

Document Tracking Nos.

Whiteboard

Posting

Validity

Search + New 1 Edit List Delete Navigate Open in Excel Navigate Fewer options

Series

Lines 6

Relationships

Code	Description	Starting No.	Ending No.	Last Date Used	Last No. Used	Def. Nos.	Ma. Nos.	Date Order
TAG-EQ	Equipment	EQ100001	—	—	—	✓	✓	□
TAG-FAC	Facilities	FAC000001	—	2019-11-15	FAC000001	✓	✓	□
TAG-FWO	Finished Work Order	FWO100001	—	2021-01-28	FWO100006	✓	□	□
TAG-INS	Instrumentation	ISO00001	—	2021-01-28	ISO00001	✓	□	□
TAG-OSP	Outside Service Providers	OSP000001	—	—	—	✓	□	□
TAG-PER	Personnel	PER100001	—	—	—	✓	✓	□
TAG-PRJ	Project Contract	PRJ000001	—	—	—	✓	□	□
TAG-PWO	Planned Work Order	PWO100001	—	2019-12-31	PWO100003	✓	✓	□
TAG-REQ	Request	REQ100001	—	2019-12-30	REQ100508	✓	✓	□
TAG-RWO	Released Work Order	RWO100001	—	2021-01-28	RWO100016	✓	✓	□
TAG-TEMP	Template	TEMP100001	—	—	—	✓	✓	□
TAG-TOOL	Tool	TOOL100001	—	2019-11-15	TOOL100001	✓	✓	□
TAG-UDN	Document Tracking	UDN100001	—	2019-12-31	UDN100478	✓	□	□
TAG-WP	Work Procedure	WP100001	—	2021-01-28	WP100002	✓	✓	□
TAG-WPSS	Work Procedure Substep	WPSS000001	—	—	—	✓	□	□
TASK	Task	TD000001	TD999999	2020-01-01	TD000050	✓	✓	□
T-ORD	Transfer Order	1001	2999	2020-01-01	1010	✓	✓	□
T-RCPT	Transfer Receipt	109001	1010999	2020-01-01	109002	✓	□	□
TS	Time Sheet	TS00001	TS99999	—	—	✓	✓	□
T-SHPT	Transfer Shipment	108001	109999	2021-01-28	108005	✓	□	□
VATPERIODS	VAT Return Periods	VATPER-0001	VATPER-9999	—	—	✓	✓	□
VATREPORTS	VAT Returns reports.	VATRET-0001	VATRET-9999	—	—	✓	✓	□
VEND	Vendor	V00010	V99990	—	—	✓	✓	□
WINL-ADJ	Whse. Adjustment Journal	T05001	T06000	2021-01-28	T05001	✓	✓	□

← TAG-EQ - EQUIPMENT | WORK DATE: 2021-01-28 ✓ SAVED

No. Series Lines

Search + New Edit List Delete Open in Excel

Starting Date	Starting No.	Ending No.	Last Date Used	Last No. Used	Warning No.	Increment-by No.	Allow Gaps in Nos.	Open
	EQ100001			EQ100000		1		

General >

IOT >

No. Series

Technician Nos. TAG

Equipment Nos. TAG

Facility Nos. TAG

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'

← TAG Controls ✓ SAVED

Actions Navigate

General >

IOT >

No. Series >

Whiteboard

Period Start: -1D Period Length: 6M Sort Order: By Ticket No.

Posting >

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

← TAG Controls

Actions Navigate

General >

IOT >

No. Series >

Whiteboard >

Posting >

Validity

Require Items	<input type="checkbox"/>	Require Work Code on Order	<input type="checkbox"/>	Ask If Charges Pending	<input type="checkbox"/>
Require Supervisor on Order	<input type="checkbox"/>	Approval Required	<input type="checkbox"/>	WO Line Act. Time Maximum	0.00
Require Technician on Line	<input checked="" type="checkbox"/>	Allow Datameter RWO post no line	<input type="checkbox"/>	Cost Apvl Threshold	0.00
Require Tech/Vendor on Order	<input checked="" type="checkbox"/>	Allow Non-Policy WO Post	<input type="checkbox"/>	WO Prompt For Cascade EQ Change	<input type="checkbox"/>
Require Equipment on Order	<input checked="" type="checkbox"/>	Create WO Default Type	Released	Use Consume Timesheet	<input type="checkbox"/>
Require Equipment on Line	<input checked="" type="checkbox"/>	Require Close all RWO lines	<input type="checkbox"/>	WO Inherit Project UDN	<input type="checkbox"/>

Preventative Date Meter Setup >

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

Dynamics 365 Business Central

CRONUS International Ltd. TAG Tasks TAG Planning TAG Masters TAG History TAG Maintenance Setup

TAG Controls TAG User Setup

User ID ↑	User Name	Technician Code	Default Requester Text	Allow Crea... WO from	Allow Equi... Trans... Move	Allow Equi... Cha... & Il...	Allow Sta... Order	Allow Cap... Exp...	Allow WO Stat... Cha...	Allow WO Del...	Allow View Costs	Allow Con... Time	Req... App... on Co...	CO App... Req...	Regions Assigned	Enterprise Assigned	View Facilities Override
ADNM	adnm	JAVIER	Requester	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	
ISSERVICE	adnm	JAVIER	Requester	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	-	-	

←

✎

+

🗑

✓ SAVED

📄

🔗

TAG Licensing

🔗 Validate Tag Key

General

Tag Key

7HjDwHg95zJu85BjHFnW4A==

Licensed Users

3

Last Validation Date

4/20/2020

Current TAG User Cou...

1

Expiry Date

4/28/2020

Employee Portal Users

2

Expiry Reminder

4/21/2020

📅

Current TAG Portal Us...

0

TAG Plan

Express

TAG Mobile Users

0

Current TAG Mobile U...

0

TAG Users

User account ↑	Company ↑	TAG User	Employee Portal	TAG Mobile
→ ADNM	CRONUS International Ltd.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TAGTEST	CRONUS International Ltd.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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
 - 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, 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:

Dynamics 365 Business Central

CRONUS International Ltd. TAG Tasks TAG Planning TAG Masters TAG History TAG Maintenance Setup

TAG Controls TAG User Setup

330 Active Requests are waiting review condition for WO.

Activities

TAG Activities

MAINTENANCE REQUESTS			PLANNING			BACKLOG				OVERVIEW			
HOLD REQUESTS	ACTIVE REQUESTS	ACTIVE REQ. WO	PENDING APP. WORK ORDERS	PLANNED WO. ORDERS	PM PLANNED ORDERS	PM RELEASED WO	FWD OVERDUE	PM RELEASED WO	RELEASED WO. ORDER	EQUIPMENT O. SERVICE	FWD COUNT	% PM - FWD COMPLETE	% FWD COMPLETE
0	335	2	1	3	0	0	4	0	8	0	8	0	0

Insights

TAG Key Performance Index

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

Dynamics 365 Business Central

CRONUS International Ltd. TAG Tasks TAG Planning TAG Masters TAG History TAG Maintenance Setup

TAG Controls TAG User Setup

1 Work Orders pending approval.

Activities

TAG Activities

MAINTENANCE REQUESTS			PLANNING			BACKLOG				OVERVIEW			
HOLD REQUESTS	ACTIVE REQUESTS	ACTIVE REQ. WO	PENDING APP. WORK ORDERS	PLANNED WO. ORDERS	PM PLANNED ORDERS	PM RELEASED WO	FWD OVERDUE	PM RELEASED WO	RELEASED WO. ORDER	EQUIPMENT O. SERVICE	FWD COUNT	% PM - FWD COMPLETE	% FWD COMPLETE
0	335	2	1	3	0	0	4	0	8	0	8	0	0

Insights

TAG Key Performance Index

TAG Controls

Actions: Navigate

TAG Location Code Setup TAG Equipment Code Setup TAG Document Code Setup TAG Web Setup TAG Labor Code Setup

TAG Facilities

TAG Regions

TAG Areas

TAG Lines

TAG Enterprise Whiteboard

Posting

← TAG FACILITIES | WORK DATE: 2021-01-28

Search **+ New** Manage Open in Excel More options

Code	Name	Parent Facility Code	Region	Enterprise	Default Item Category
ATL					
ED					
FAC000001	Default				
FAC000002	Default				
FAC001	Default				
FAC002	Default				
FAC5122323432113556	FAC51				
LON					
TOR					

← TAG Facility Card

Navigate

General Show more

Code Country Code Create Purchase Order ☐

Name Region Zip Code

Address Enterprise Exclude Address on WO ☐

City Personnel Group Block Job ☐

State Temperature Measure

Communication

Phone No. Fax No. E-Mail

Phone No. 2 Telex No. Contact

Posting >

Validity

Require Navigation Items ☐ Default Labor Rate Item Category Filter

Navigation Location Default Template Manage Consumption On ☐

Purchasing Defaults >

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.
 - o 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

Dynamics 365 Business Central

← TAG Controls

Actions **Navigate**

TAG Location Code Setup TAG Equipment Code Setup TAG Document Code Setup TAG Web Setup TAG Labor Code Setup

TAG Facilities

TAG Regions

TAG Areas

TAG Lines

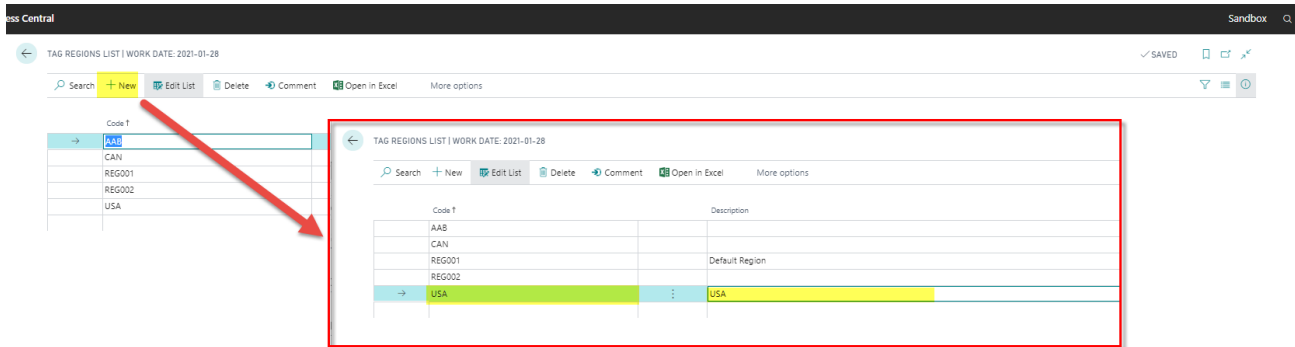
TAG Enterprise

Whiteboard >

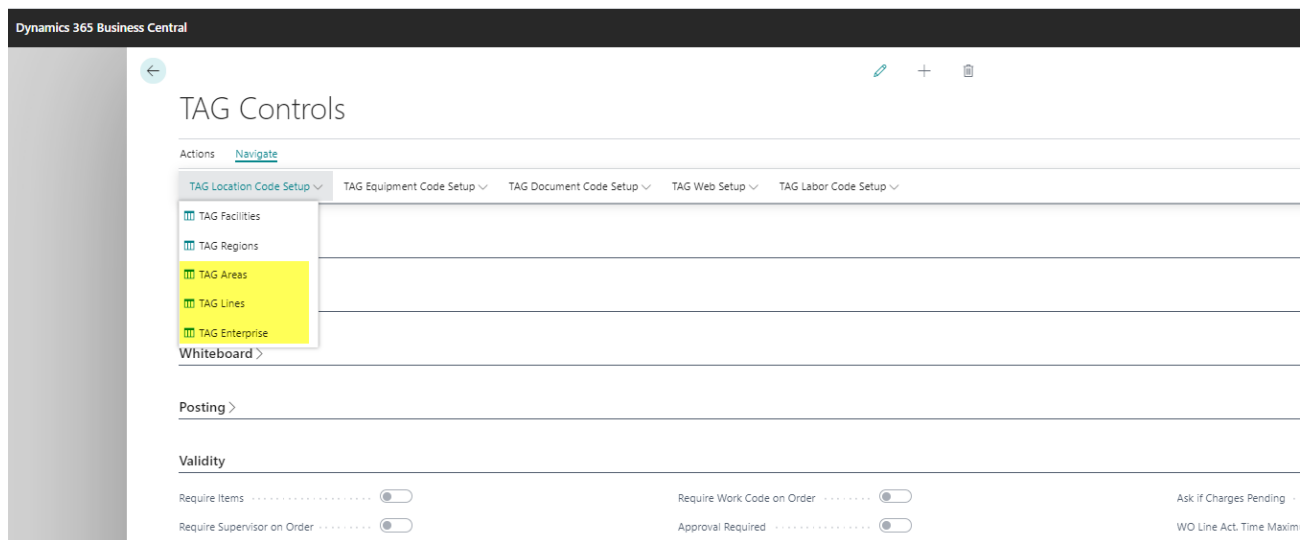
Posting >

Validity

Require Items ☐ Require Work Code on Order ☐ Ask if Charges Pending ☐



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.

The screenshot shows the 'TAG Controls' interface. On the left is a navigation menu with sections: Actions (containing 'Navigate' with a red circle 1), IOT, No. Series, Whiteboard, Posting, and Validity (with several toggle switches). The main area shows a dropdown menu for 'TAG Equipment Code Setup' (with a red circle 2) containing options: TAG Equipment Groups, TAG Equipment Subgroups, TAG Main Codes, TAG Primary Codes, and TAG Secondary Codes. A red arrow points from the 'TAG Equipment Groups' option to a secondary window titled 'TAG EQUIPMENT GROUPS | WORK DATE: 2021-01-28'. This window has a ribbon with 'New' (red circle 3), 'Edit List', 'Delete', 'Comment', 'Equipment Labels...', 'Equip. Subgroups', and 'Open in Excel'. Below the ribbon is a table with columns 'Code 1' and 'Description'. The first row is highlighted in yellow and contains 'BEARING' (red circle 4) and 'Bearing' (red circle 5). Other rows include BODY, BRAKE, BUILDING, CAJITY, CNC, COOLING, CORE, EJECTION, ELECTRICAL, ENGINE, EQGRP001, EQGRP002, EXHAUST, FIXED, and FORKLIFT. At the bottom of the window is a toggle switch for 'Require Close all RWO lines'.

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.

TAG Controls

Actions **Navigate**

TAG Location Code Setup TAG Equipment Code Setup **TAG Document Code Setup** TAG Web Setup TAG Labor Code Setup

IOT >

No. Series >

Whiteboard >

Posting >

Validity

Require Items ☐

Require Supervisor on Order ☐

Require Technician on Line ☐

Require Tech/Vendor on Order ☐

Require Equipment on Order ☐

Require Equipment on Line ☐

TAG Failure Codes

TAG Failure Priorities

TAG Maintenance Types

TAG Meter Types

TAG Operator Fault Entry

TAG Order Types

TAG Problem Codes

TAG Reason Codes

TAG Skill Codes

TAG Status Codes

TAG Weather Conditions

TAG Work Codes

TAG Rank Priorities

TAG Posting Codes

TAG Certification Codes

TAG Batches

TAG MAINTENANCE TYPES | WORK DATE: 2021-01-28

Search **New** List Delete Open in Box

Code	Description
1125	Electrical
MECH	Mechanical

Allow Non-Policy WO Post ☐

Create WO Default Type **Released**

Require Close all RWO lines ☐

WO Prompt For Cascade EQ Change ☐

Use Consume Timesheet ☐

WO Inherit Project UDN ☐

Preventative Date Meter Setup >

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

TAG Controls

Actions **Navigate**

TAG Location Code Setup TAG Equipment Code Setup **TAG Document Code Setup** TAG Web Setup TAG Labor Code Setup

IOT >

No. Series >

Whiteboard >

Posting >

Validity

Require Items ☐

Require Supervisor on Order ☐

Require Technician on Line ☐

Require Tech/Vendor on Order ☐

Require Equipment on Order ☐

Require Equipment on Line ☐

TAG Failure Codes

TAG Failure Priorities

TAG Maintenance Types

TAG Meter Types

TAG Operator Fault Entry

TAG Order Types

TAG Problem Codes

TAG Reason Codes

TAG Skill Codes

TAG Status Codes

TAG Weather Conditions

TAG Work Codes

TAG Rank Priorities

TAG Posting Codes

TAG Certification Codes

TAG Batches

TAG ORDER TYPES | WORK DATE: 2021-01-28

Search **New** List Delete Open in Box

Code	Description	Require RWO Signoff	Use Verification Chart
1125	Electrical	<input type="checkbox"/>	<input type="checkbox"/>
MECH	Mechanical	<input type="checkbox"/>	<input type="checkbox"/>
REQUEST	Requested Maintenance	<input type="checkbox"/>	<input type="checkbox"/>

Require Close all RWO lines ☐

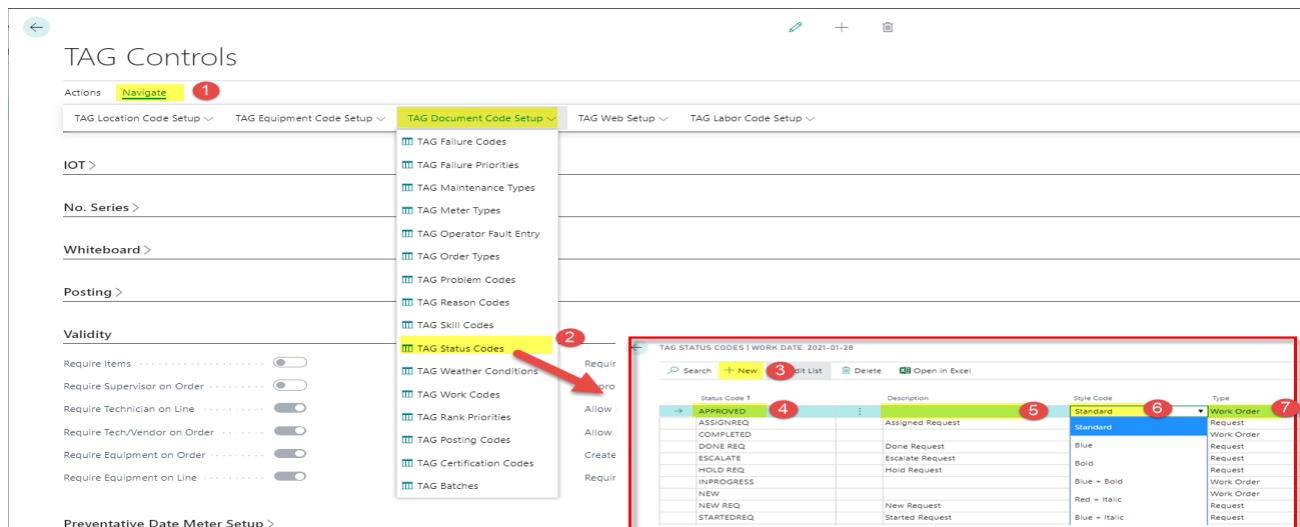
WO Inherit Project UDN ☐

Preventative Date Meter Setup >

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



The screenshot shows the TAG Controls interface. On the left, the 'Navigate' button is highlighted with a red circle 1. In the center, the 'TAG Document Code Setup' dropdown menu is open, and 'TAG Status Codes' is highlighted with a red circle 2. On the right, a preview of the 'TAG STATUS CODES | WORK DATE: 2021-01-28' table is shown. The table has columns: Status Code 1 (4), Description (5), Style Code (6), and Type (7). The first row is 'APPROVED' with description 'Assigned Request', style code 'Standard', and type 'Work Order'.

Status Code 1	Description	Style Code	Type
APPROVED	Assigned Request	Standard	Work Order
ASSIGNEDREQ	Assigned Request	Blue	Request
COMPLETED	Done Request	Bold	Request
DONE REQ	Escalate Request	Blue + Bold	Request
ESCALATE	Hold Request	Red + Italic	Work Order
HOLD REQ	New Request	Blue + Italic	Request
INPROGRESS	Started Request		
NEW			
NEW REQ			
STARTEDREQ			

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

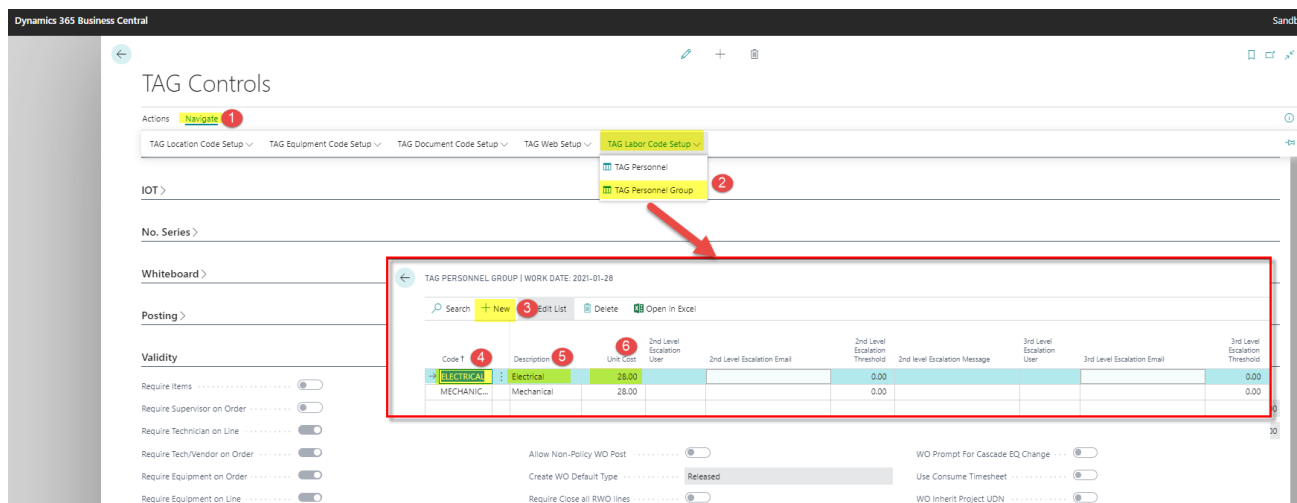
- TAG Work Codes**
- TAG Problem Codes**
- TAG Reason Codes**
- TAG Rank Priorities**
- Tag Skills**
- Tag Certifications**
- Tag Failures**
- Tag Meter Types**
- Tag Posting Codes**

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



Code	Description	Unit Cost	2nd Level Escalation User	2nd Level Escalation Threshold	2nd Level Escalation Message	3rd Level Escalation User	3rd Level Escalation Threshold
ELECTRICAL	Electrical	26.00		0.00			0.00
MECHANICAL	Mechanical	28.00		0.00			0.00

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

Dynamics 365 Business Central Sandbox

←
✎
+
🗑
🔍

TAG Controls

Actions 🔍

Navigate
1

TAG Location Code Setup ▾
TAG Equipment Code Setup ▾
TAG Document Code Setup ▾
TAG Web Setup ▾
TAG Labor Code Setup ▾
2

📄 TAG Personnel
📄 TAG Personnel Group

IOT >

No. Series >

Whiteboard >

Posting >

Validity

Require Items ⋮ <input type="checkbox"/>	Require Work Code on Order ⋮ <input type="checkbox"/>	Ask if Charges Pending ⋮ <input type="checkbox"/>
Require Supervisor on Order ⋮ <input type="checkbox"/>	Approval Required ⋮ <input type="checkbox"/>	WO Line Act. Time Maximum ⋮ 0.00
Require Technician on Line ⋮ <input type="checkbox"/>	Allow Datameter RWO post no line ⋮ <input type="checkbox"/>	Cost Apv'l Threshold ⋮ 0.00
Require Tech/Vendor on Order ⋮ <input type="checkbox"/>	Allow Non-Policy WO Post ⋮ <input type="checkbox"/>	WO Prompt For Cascade EQ Change ⋮ <input type="checkbox"/>
Require Equipment on Order ⋮ <input type="checkbox"/>	Create WO Default Type ⋮ Released	Use Consume Timesheet ⋮ <input type="checkbox"/>
Require Equipment on Line ⋮ <input type="checkbox"/>	Require Close all RWO lines ⋮ <input type="checkbox"/>	WO Inherit Project UDIN ⋮ <input type="checkbox"/>

Preventative Date Meter Setup >

← TAG PERSONNEL CARD | WORK DATE: 2021-01-28
✎ + 🗑

JAVIER

📊 Statistics
📄 Resource List
More options

General
Show more

No. ⋮	JAVIER ⋮
Name ⋮	
Region ⋮	
Facility ⋮	
Personnel Type ⋮	Employee ▾
Supervisor Code ⋮	
Job Title ⋮	
Certifications ⋮	0
Skills ⋮	0
Search Name ⋮	
Resource No. ⋮	
Blocked ⋮	<input type="checkbox"/>
Union No. ⋮	
Personnel Group ⋮	ELECTRICAL ▾

JAVIER

📊 Statistics 📋 Resource List | More options

General >

JAVIER Employee

Personal Data

Title	State Code	E-Mail
Address	ZIP Code	Education
Address 2	Country Code	Miscellaneous
City	Reference No.	Employment Date

Cost

Unit of Measure Code	Burdened Annual Cost	Per Hour Cost Override
Annual Cost	Hours Available Annually	Posting Code
Burden Multiplier	Per Hour Annual Cost	

Whiteboard >

0.00 No

Sales >

No

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

1 Work Orders pending approval.

- + Create Work Order
- > Planned Work Orders
- > Released Work Orders
- > Requests
- > Order Worksheet
- > Tracking

○ ●

Activities

TAG Activities

MAINTENANCE REQUESTS

HOLD REQUESTS	ACTIVE REQUESTS	ACTIVE REQUE... WO
0	335	2
>	>	>

PLANNING

PENDING APP... WORK ORDERS	PLANNED WO... ORDERS	PM PLANNED ... ORDERS
1	3	0
>	>	>

BACKLOG

PM RELEASED WO	RWO OVERDUE	PM RELEASED WO	RELEASED WO... ORDER	OVE
0	4	0	9	0
>	>	>	>	>

Insights

TAG Key Performance Index



TAG WORK PROCEDURES CARD | WORK DATE: 2021-01-28



WP100003

Statistics | Actions | Navigate | Fewer options

General

Show more

No.	WP100003	Work Code	
Description	Electrical inspection	Keep Work Code	<input type="checkbox"/>
Standard Time	0.00	Equipment Group	
Estimated Step Time	0.00	Personnel Group	
Master WP Est Time Qty	0.00	Keep Personnel Group	<input type="checkbox"/>
Requirements	2	Planned Work Orders	1
Qualifications	0	Released Work Orders	0
Attachments	0	Finished Work Orders	0
Expand Substeps to WO Li...	<input type="checkbox"/>	Assigned Templates	0
		Assigned Date Meters	0
		Creation Date	2019-12-31
		Last Date Modified	2019-12-31

Results >

No No Text

← TAG WORK PROCEDURES CARD | WORK DATE: 2021-01-28

WP100003

Statistics | Actions | **Navigate** | Fewer options

Procedures ▾

- Sub-Steps Card
- Sub-Steps List
- Test Results
- Meter History
- Statistics
- Related Requirements**
- Required Qualifications
- Attachments
- Copy Procedure
- Comment
- Prices

WP100003 ...

Electrical Inspection ...

0.00

0.00

0.00

2

0

0

Work Code ...

Keep Work Code ...

Equipment Group ...

Personnel Group ...

Keep Personnel Group ...

Planned Work Orders ... 1

Released Work Orders ... 0

Finished Work Orders ... 0

Assigned Templates ... 0

Assigned Date Meters ... 0

Creation Date ... 2019-12-31

Last Date Modified ... 2019-12-31

Results >

← TAG EXPECTED RELATED REQUIREMENTS | WORK DATE: 2021-01-28

Search | **+ New** | Edit List | Delete | Open in Excel | More options

Source No. 1 ▾	Source Line No. 1	Type	No.	Description	Sub... Allo...	Unit of Measure	Variant Code	Location Code	Available Quantity (Locations)	Expected Quantity	Expected Unit Cost	Extended C
→ WP100003	0	Item ▾	LS-150	Loudspeaker, Cherry, 150W	PCS				-6	1.00	72.00	72
WP100003	0	Item	CON100001	Default Consumable						1.00	35.00	35
		Consumable										
		Tool										
		OSP										
		Other										
		Parts										
		Resource										

TAG Templates:

*Tag Plan note: Tag plan must be = CMMS or EAM in order to create templates.
Templates are not created with Tag initialize data.*

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

Dynamics 365 Business Central

CRONUS International Ltd. TAG Tasks TAG Planning TAG Masters TAG History TAG Maintenance Setup

TAG Date Meter Policies TAG Inventory Policies TAG Order Worksheet TAG Templates TAG Work Procedures TAG Billing Prices TAG Project Contracts TAG Unions TAG Request Worksheet TAG Sales Documents TAG Work Order Detail TAG Tracking

No. 1	Description	Description 2	Region	Facility	Priority	Job No.	Maint. Type	Order Type	Reason Code	Status	Work Code
TEMP100001	Electrical inspection				Routine		ELECT	PM	AAA	NEW	INSPECT

Dynamics 365 Business Central

CRONUS International Ltd. TAG Tasks TAG Planning TAG Masters TAG History TAG Maintenance Setup

TAG Templates: All Search New Delete Open in Excel

No. 1	Description	Description 2	Region	Facility	Priority	Job No.	Maint. Type	Order Type	Reason Code	Status	Work Code
TEMP100001	Electrical inspection				Routine		ELECT	PM	AAA	NEW	INSPECT

← TAG TEMPLATE CARD | WORK DATE: 2021-01-28

TEMP100001

Actions Navigate

General

No.	TEMP100001	Estimated Time	2.00	Order Type	PM
Description	Electrical inspection	Priority	Routine	Status	NEW
Description 2		Job No.		Work Code	INSPECT
Region		Maint. Type	ELECT	Blocked	<input type="checkbox"/>
Facility		Reason Code	AAA		
Standard Time	0.00	Problem Code	ELECTRICAL		

TAG Lines Manage More options

Work Procedure Step	Description	Results Input Required	Unit of Measure	Standard Time	Estimated Time	Work Code
→ WP100003	Electrical inspection	<input type="checkbox"/>		0.00	2.00	

← TAG TEMPLATE CARD | WORK DATE: 2021-01-28

TEMP100001

Actions Navigate

General

No.	TEMP100001	Estimated Time	2.00	Order Type	PM
Description	Electrical Inspection	Priority	Routine	Status	NEW
Description 2		Job No.		Work Code	INSPECT
Region		Maint. Type	ELECT	Blocked	<input checked="" type="checkbox"/>
Facility		Reason Code	AAA		
Standard Time	0.00	Problem Code	ELECTRICAL		

TAG Lines Manage Line Fewer options

Required Qualifications **Related Requirements** Sub Steps Attachments

→ WP100003	Electrical Inspection		0.00	2.00	
------------	-----------------------	--	------	------	--

Search + New Edit List Delete Open in Excel More options

EDIT - TAG EXPECTED RELATED REQUIREMENTS

Source No. ↑ ▼	Source Line No. ↑ ▼	Type	No.	Description	Sub... Allo...	Unit of Measure	Variant Code	Location Code	Available Quantity (Locations)	Expected Quantity	Expected Unit Cost	Extended Cost
→ TEMP100001	10000	Item	LS-150	Loudspeaker, Cherry, 150W		PCS			-6	1.00	72.00	72.00
TEMP100001	10000	Consumable	CON100001	Default Consumable						1.00	0.00	0.00

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.

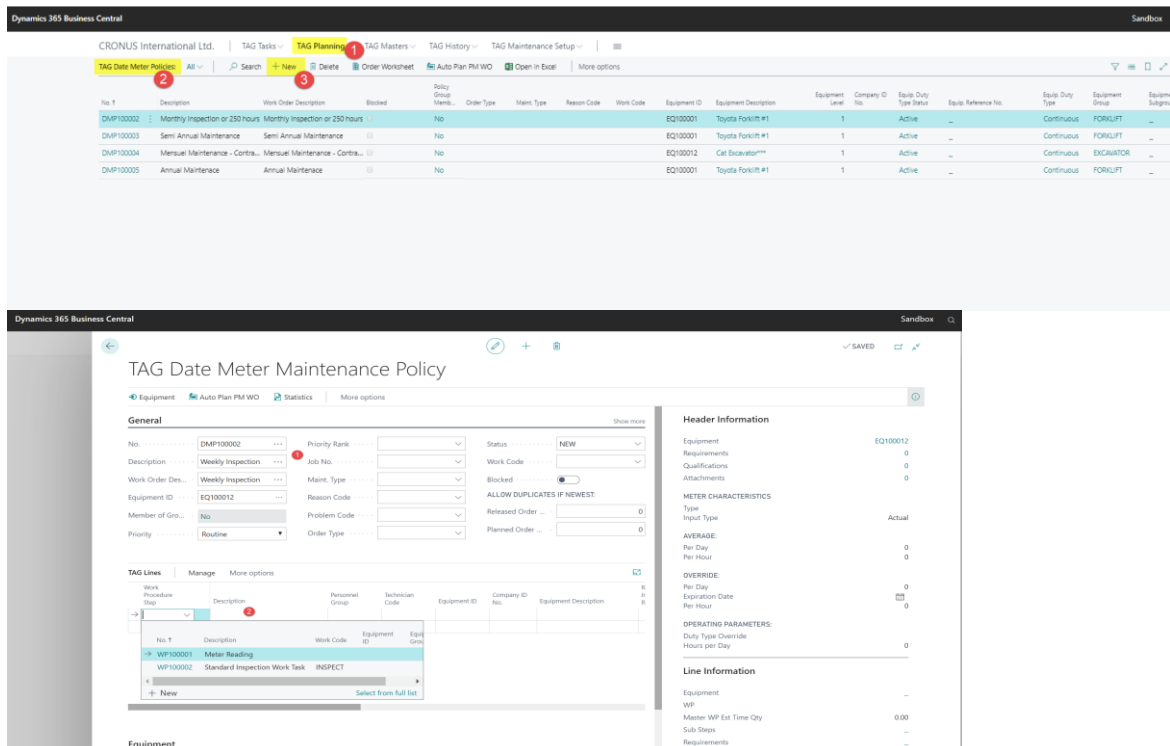
Create new Date Meter Policy (DMP)

- 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:



The screenshot displays the Dynamics 365 Business Central interface. The top section shows a list of TAG Date Meter Policies. The bottom section shows the 'TAG Date Meter Maintenance Policy' form, which is used to create or edit a policy.

TAG Date Meter Policies List:

No.	Description	Work Order Description	Blocked	Policy Group	Order Type	Maint. Type	Reason Code	Work Code	Equipment ID	Equipment Description	Equipment Unit	Company ID	Equip. Duty Type	Equip. Reference No.	Equip. Duty Type	Equipment Group	Equipment Subgroup
DMP100002	Monthly inspection or 250 hours	Monthly inspection or 250 hours		No					EQ100001	Toyota Forklift #1	1	Active			Continuous	FORKLIFT	
DMP100003	Semi Annual Maintenance	Semi Annual Maintenance		No					EQ100001	Toyota Forklift #1	1	Active			Continuous	FORKLIFT	
DMP100004	Manual Maintenance - Contin...	Manual Maintenance - Contin...		No					EQ100012	Car Excavator	1	Active			Continuous	EXCAVATOR	
DMP100005	Annual Maintenance	Annual Maintenance		No					EQ100001	Toyota Forklift #1	1	Active			Continuous	FORKLIFT	

TAG Date Meter Maintenance Policy Form:

General

No. DMP100002 Priority Rank NEW Status NEW
 Description Weekly Inspection Job No. Work Code
 Work Order Des. Weekly Inspection Maint. Type
 Equipment ID EQ100012 Reason Code
 Member of Group No Problem Code
 Priority Routine Order Type

Header Information

Equipment EQ100012
 Requirements 0
 Qualifications 0
 Attachments 0

METER CHARACTERISTICS

Type Actual
 Input Type
 AVERAGE
 Per Day 0
 Per Hour 0

OVERVIEW

Per Day 0
 Expiration Date 0
 Per Hour 0

OPERATING PARAMETERS

Duty Type Charge 0
 Hours per Day 0

Line Information

Equipment
 WP
 Master WP Est Time Qty 0.00
 Sub Steps
 Requirements

TAG Lines

No.	Description	Work Code	Equipment ID	Equip. Group
WP100001	Meter Reading			
WP100002	Standard Inspection Work Task	INSPECT		

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.

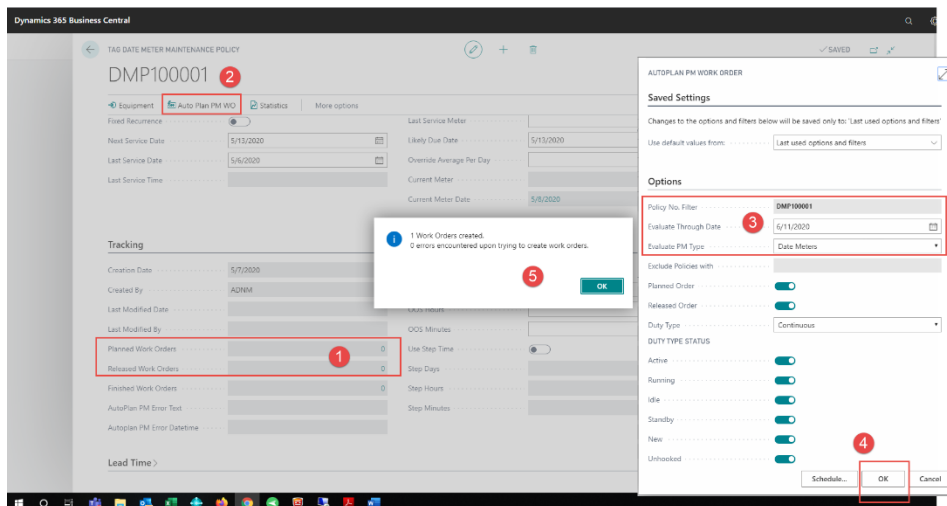
Note:

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.



Dynamics 365 Business Central

TAG DATE METER MAINTENANCE POLICY

DMP100001

Equipment | Auto Plan PM WO | Statistics | More options

DATE SCHEDULING

Activate Date: ☐ **ON**

Occurrence Interval:

Fixed Recurrence: ☐ **OFF**

Next Service Date: 5/18/2020

Last Service Date: 5/11/2020

Last Service Time: 4:37:43 PM

Occurrence Interval:

Meter Read Recurrence: ☐ **OFF**

Next Meter Service:

Last Service Meter:

Likely Due Date: 5/13/2020

Override Average Per Day:

Current Meter:

Current Meter Date: 5/8/2020

Header Information

Equipment: ZEQ100001

Requirements: 0

Qualifications: 0

Attachments: 0

METER CHARACTERISTICS

Type:

Input Type:

AVERAGE:

Per Day: 0

Per Hour: 0

OVERRIDE:

Tracking

Creation Date: 5/7/2020

Created By: ADAM

Last Modified Date:

Last Modified By:

Planned Work Orders:

Released Work Orders: **1**

Finished Work Orders:

Auto Plan PM Error Text:

TAG Work Order List

2

No.	Subject	Start Date	End Date	Estimated Usage	Actual Usage	Record Usage	Estimated Time	Actual Time	Record Time	Remarks
250100008	Default DMP	5/18/2020		0.00	0.00	0.00	0.00	0.00	0.00	

Order Information

Order No.: ZEQ100001

WP:

Master WP Est Time Qty:

Sub Steps:

Requirements:

Dynamics 365 Business Central

TAG RELEASED WORK ORDER

Released · RWO100008

Comments | All Work Order Feedback | Work Order Packet | All Attachments | Consumption | Consume Timesheet | **Complete** | Actions | Navigate | Report | Fewer options

General

RWO100008 | Default DMP | ZEQ100001 | Release | NEW

Service

Lines | Manage | More options

Line	Step No.	Description	Actual Time	Code	Equipment ID	Company ID	Equipment Description	Equip. Serial No.
1		DMP Task Line	0.00	PERS001	ZEQ100001		Default Equipment sd	

Equipment

Default Equipment sd | R62001 | G4C30001

Scheduled

Supervisor Code:

Personnel Group:

Technician Code: **PERS001**

OSP No.:

Order Date: 5/11/2020

Document Date: 5/11/2020

Expiration Date: 5/13/2021

Requested Service Date: 5/18/2020

Due By Date: 5/28/2020

Starting Date: 5/18/2020

Starting Time: 4:44:37 PM

Ending Date:

Ending Time:

Standard Time:

Estimated Time:

Total Step Time:

Tracking

Order Source: Generator

Order Source Type: Released

Order Source No.: RWO100008

UDN: UDN100009

Vendor Invoice:

Customer Invoice:

External Document No.:

Requester: DMP100001

Creation Date: 5/11/2020

Last Modified By: TAGTEST

Last Modified Date: 5/11/2020

Policy Type: DateMeter

Policy No.: DMP100001

Current Posted Meter Reading:

Current Posted Meter Reading: 5/8/2020

RWO Batch posting error text:

Order Information

Selected WO No.: RWO100008

Original WO No.: RWO100008

Consumptions: 0

PA Consumptions: 0

All Attachments: 0

USAGE

Expected Usage: 0.00

Utilisation: 0.00

Posted Usage: 0.00

TIME

Estimated Time: 0.00

Actual Time: 0.00

Recorded Time: 0.00

Posted Time: 0.00

Header Information

Equipment: ZEQ100001

Requirements: 0

Qualifications: 0

Feedback: 0

Attachments: 0

Order Information

Selected WO No.: RWO100008

Original WO No.: RWO100008

Consumptions: 0

PA Consumptions: 0

All Attachments: 0

USAGE

Expected Usage: 0.00

Utilisation: 0.00

Posted Usage: 0.00

TIME

Estimated Time: 0.00

Actual Time: 0.00

Recorded Time: 0.00

Posted Time: 0.00

Header Information

Equipment: ZEQ100001

Requirements: 0

Qualifications: 0

Feedback: 0

Attachments: 0

Comments: 0

Test Results: 0

Meter History: 1

Dynamics 365 Business Central

← TAG DATE METER MAINTENANCE POLICY + -

✓ SAVED

DMP100001

Equipment | Auto Plan PM WO | Statistics | More options

Activate Date	<input type="checkbox"/>	Meter Fixed Recurrence	<input type="checkbox"/>
Occurrence Interval	TW	Next Meter Service	0
Fixed Recurrence	<input type="checkbox"/>	Last Service Meter	0
Next Service Date	5/18/2020	Likely Due Date	5/13/2020
Last Service Date	5/11/2020	Override Average Per Day	0
Last Service Time	4:37:43 PM	Current Meter	0
		Current Meter Date	5/8/2020

Header Information

Equipment	ZEQ100001
Requirements	0
Qualifications	0
Attachments	0

METER CHARACTERISTICS

Type	Actual
Input Type	
AVERAGE:	
Per Day	0
Per Hour	0
OVERRIDE:	
Per Day	0
Expiration Date	0
Per Hour	0

OPERATING PARAMETERS:

Duty Type Override	0
Hours per Day	0

Line Information

Equipment	ZEQ100001
WP	
Master WP Est Time Qty	0.00
Sub Steps	0
Requirements	0

Tracking

Creation Date	5/7/2020	Take OOS	<input type="checkbox"/>
Created By	ACNM	OOS Days	0
Last Modified Date		OOS Hours	0
Last Modified By		OOS Minutes	0
Planned Work Orders	0	Use Step Time	<input type="checkbox"/>
Released Work Orders	0	Step Days	0
Finished Work Orders	1	Step Hours	0
AutoPlan PM Error Text		Step Minutes	0
AutoPlan PM Error Datetime			

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

Dynamics 365 Business Central

CRONUS International Ltd. | TAG Tasks | **TAG Planning** | TAG Masters | TAG History | TAG Maintenance Setup

TAG Date Meter Policies: All | Search | + New | Delete | Order Worksheet | **Auto Plan PM WO** | Open in Excel | More options

No.	Description	Work Order Description	Block...	Policy Group Memb...	Order Type	Maint. Type	Reason Code	Work Code	Et...
DMP100001	Default DMP			No	CM				Z
DMP100002	Weekly Inspection	Weekly Inspection		No					E

Options

Evaluate Through Date: 12/31/2022

Exclude PM Type: Date Meters

Exclude Policies with:

Planned Order: ☒

Released Order: ☒

Only Type: Continuous

Build PM Status: ☒

Order: ☒

Running: ☒

Idle: ☒

Standby: ☒

None: ☒

Unloaded: ☒

Down: ☒

Revised: ☒

Filter: Grouped Policies

Equipment ID:

Equipment Group:

Area:

Line:

Order Type:

Filter:

Schedule... OK Cancel

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

Steps:

Dynamics 365 Business Central

CRONUS International Ltd. | TAG Tasks | **TAG Planning** | TAG Masters | TAG History | TAG Maintenance Setup

TAG Date Meter Policies | **TAG Order Worksheet** | TAG Work Procedures | TAG Project Contracts | TAG Request Worksheet | TAG Work Order Detail | TAG IOT Alert Actions

TAG Inventory Policies | TAG Templates | TAG Billing Prices | TAG Unions | TAG Sales Documents | TAG Tracking

Policy Type	Policy No.	Equipment ID	Equipment Description	Company ID	Hierarchy Parent #	Equipment Level	Equipment Group	Equipment Subgroup	DateMeter Type
DateMeter	DMP100002	EQ100012	Cat Excavator***		EQ100012	1	EXCAVATOR		Date
DateMeter	DMP100001	ZEQ100001	Default Equipment - subassem...		ZEQ100001	1	EQGRP002		Date

Dynamics 365 Business Central | Sandbox

CRONUS International Ltd. | TAG Tasks | TAG Planning | TAG Masters | TAG History | TAG Maintenance Setup

TAG Order Worksheet: All | Search | + New | Manage | Evaluate Policies | Build Orders | Calculation Method | Backlog Report | Open in Excel

Policy Type	Policy No.	Equipment ID	Equipment Description	Company ID No.	Hierarchy Parent	Equipment Level	Equipment Group	Equipment Subgroup	DateMeter Type
DateMeter	DMP100002	EQ100012	Cat Excavator***	EQ100001		1			
DateMeter	DMP100001	ZEQ100001	Default Equipment - subassem...	ZEQ100001		1			

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Evaluate Policies

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Dynamics 365 Business Central | Sandbox

CRONUS International Ltd. | TAG Tasks | TAG Planning | TAG Masters | TAG History | TAG Maintenance Setup

TAG Order Worksheet: All | Search | + New | Manage | Evaluate Policies | Build Orders | Calculation Method | Backlog Report | Open in Excel

Policy Type	Policy No.	Equipment ID	Equipment Description	Company ID No.	Hierarchy Parent	Equipment Level	Equipment Group	Equipment Subgroup	DateMeter Type
DateMeter	DMP100002	EQ100012	Cat Excavator***	EQ100001		1	EXCAVATOR		Date
DateMeter	DMP100001	ZEQ100001	Default Equipment - subassem...	ZEQ100001		1	EQGRP002		Date

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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.

Steps:

Dynamics 365 Business Central Sandbox

CRONUS International Ltd. TAG Tasks **TAG Planning** 1 TAG Masters TAG History TAG Maintenance Setup

TAG Date Meter Policies TAG Order Worksheet TAG Work Procedures TAG Project Contracts 2 Request Worksheet TAG Work Order Detail TAG IOT Alert Actions
TAG Inventory Policies TAG Templates TAG Billing Prices TAG Unions TAG Sales Documents TAG Tracking

No.	Document Tracking No.	Description	Facility	Enterprise	Customer No.	Start Date	End Date	Currency Code	Contract Status	Contract Type	Invoice Period	Contract Value
PRJ000001	UDN100262	test							Open	UDN		0.00
PRJ000002	UDN100477	Weekly inspection	ED	ENTERPRISE001	10000	2019-12-31	2020-06-30		Open	Periodic Invo...		0.00

Dynamics 365 Business Central

CRONUS International Ltd. TAG Tasks TAG Planning TAG Masters TAG History TAG Maintenance Setup

TAG Project Contracts: All Search New Delete All Requirements Statistics Open in Excel More options

No. 1 Document Tracking No. Description Facility Enterprise Customer No. Start Date End Date Currency Code Project Contract Status Contract Type Invoice Period Contract Value

PRJ000001 UDNI100262 test ED

PRJ000002 UDNI100477 Weekly Inspection ED

PRJ000002 TAG CONTRACT | WORK DATE: 2021-01-28

New Process More options

General

No. PRJ000002 Equipment ID EQ100012 End Date 2020-06-30

Document Tracking No. UDNI100477 Region CAN Supervisor Code

Description Weekly Inspection Facility ED Technician Code

Enterprise ENTERPRISE001 Estimate Duration 6M

Customer No. 10000 Start Date 2019-12-31

Lines Manage

Line No.	Step No.	Equipment ID	Facility	Description	Unit of Measure	WP Quantity	Estimated Time	Billing Unit Price	Unit of Measure	Estimated Billing Price	Unit Cost	Estimated Cost	Actual Time	Actual Cost
1000	WP100003	EQ100012	ENTERPRISE001	Electrical Inspection	PCS	0.00	\$0.00	0.00	0.00	\$0.00	50.00	25,000.00	0.00	0.00

Contract Details

Currency Code USD

Project Contract Status Signed

Contract Type UDNI

Contract Value 25,000.00

Dynamics 365 Business Central

TAG CONTRACT | WORK DATE: 2021-01-28

PRJ000002

New Process Actions Navigate Fewer options

General

No. PRJ000002 Equipment ID EQ100012 End Date 2020-06-30

Document Tracking No. UDNI100477 Region CAN Supervisor Code

Description Weekly Inspection Facility ED Technician Code

Enterprise ENTERPRISE001 Estimate Duration 6M

Customer No. 10000 Start Date 2019-12-31

Lines Manage

New Line Delete Line Related Requirements

Line No.	Step No.	Equipment ID	Facility	Description	Unit of Measure	WP Quantity	Estimated Time	Billing Unit Price	Unit of Measure	Estimated Billing Price	Unit Cost	Estimated Cost	Actual Time	Actual Cost
1000	WP100003	EQ100012	ENTERPRISE001	Electrical Inspection	PCS	0.00	\$0.00	0.00	0.00	\$0.00	50.00	25,000.00	0.00	0.00

Dynamics 365 Business Central

TAG PROJECT RELATED REQUIREMENTS | WORK DATE: 2021-01-28

PRJ000002

Search New Edit List Delete Open in Excel

Project Contract No. 1	Source Line No. 1	Line No. 1	Document Tracking No.	Type	No.	Description	Unit of Measure	Expected Quantity	Expected Unit Cost	Extended Cost	Billing Unit Price	Estimated Billing Price	Equipment ID	Facility	Enterprise	Escrued Quantity	Open Q
PRJ000002	1000	10000	UDNI100477	Item	LS-150	Loudspeaker, Cherry, 150W	PCS	1.00	72.00	72.00	129.00	129.00	EQ100012	ENTERPRISE001	0.00	0.00	0.00
PRJ000002	1000	20000	UDNI100477	Consumable	CDN100001	Default Consumable		1.00	0.00	0.00	0.00	0.00				0.00	0.00

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:

Dynamics 365 Business Central

CRONUS International Ltd. TAG Tasks TAG Planning TAG Masters TAG History TAG Maintenance Setup

TAG Project Contracts All Search + New Delete Add All Requirements Statistics Open in Excel More options

No.	Document Tracking No.	Description	Facility	Enterprise	Customer No.	Start Date	End Date	Currency Code	Project Contract Status	Contract Type	Invoice Period	Contract Value
PRJ000001	UDN100262	test							Open	UDN		0.00
PRJ000002	UDN100477	Weekly Inspection	ED	ENTERPRISE001	10000	2019-12-31	2020-06-30	USD	Signed	UDN		25,000.00

Dynamics 365 Business Central

TAG CONTRACT | WORK DATE: 2021-01-28

PRJ000002

New Process More options

General

No. PRJ00002 Equipment ID EQ100012 End Date 2020-06-30

Document Tracking No. UDN100477 Region CAN Supervisor Code

Description Weekly Inspection Facility ED Technician Code

Enterprise ENTERPRISE001 Estimate Duration 6M

Customer No. 10000 Start Date 2019-12-31

Lines Manage

Line No.	Step No.	Equipment ID	Technician Code	Enterprise	Region	Facility	Description	Qty. Req. in Order	WP Quantity	Estimated Time	Billing Unit Price	Unit of Measure	Estimated Billing Price	Unit Cost	Estimated Cost	Actual Time	Actual Cost
1000	WP100003	EQ100012		ENTERPRISE001	CAN	ED	Electrical Inspection		0.00	500.00	0.00	HOURLY	0.00	50.00	25,000.00	0.00	

Business Central

PRJ00002

Actions

Create Work Orders

More options

EDIT - TAG PROJECT CONTRACT WORKSHEET

Project Contract No. 1	Actual Cost	Starting Date	Ending Date	WP Quantity	Remaining to Transfer	Remaining	Tran... to WO	Quantity to Transfer
PRJ00002	0.00	2019-12-31	2020-06-30	0.00	-1.00	0.00		0.00

Project Related Requirement

Project Contract No. 1	Open Quantity	Remaining to Transfer	Remaining Qty-Time	Actual Quantity	Actual Billing Price	Tran... to WO	Quantity to transfer
PRJ00002	0.00	1.00	1.00	0.00	0.00		0.00
PRJ00002	0.00	1.00	1.00	0.00	0.00		0.00

Unit Cost Estimated Cost Actual Time Actu

50.00 25,000.00 0.00

Dynamics 365 Business Central

PRJ00002

Actions

Create Planned Work Order

Create Released Work Order

Project Contract No. 1

Project Contract No. 1	Actual Cost	Starting Date	Ending Date	WP Quantity	Remaining to Transfer	Remaining	Tran... to WO	Quantity to Transfer
PRJ00002	0.00	2019-12-31	2020-06-30	0.00	-1.00	0.00		0.00

Project Related Requirement

Project Contract No. 1	Open Quantity	Remaining to Transfer	Remaining Qty-Time	Actual Quantity	Actual Billing Price	Tran... to WO	Quantity to transfer
PRJ00002	0.00	1.00	1.00	0.00	0.00		0.00
PRJ00002	0.00	1.00	1.00	0.00	0.00		0.00

Close

Line No. Step No. Equipment ID Technician Code Enterprise Region Facility Description Do Not Show in Dis... WP Quantity Estimated Time Billing Unit Price Unit of Measure

1000 WP100003 EQ100012 ENTERPRISED CAN ED Electrical Inspection 0.00 500.00 0.00 HOUR

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.

Dynamics 365 Business Central Sandbox

← TAG CONTRACT | WORK DATE: 2021-01-28 🔍

PRJ00002

New Process Actions **Work Order** Fewer options

Planned Work Orders Released Work Orders **Finished Work Orders** All Prices Statistics All Requirements

No. PRJ00002 Equipment ID EQ100012 End Date 2020-06-30

Document Tracking No. UD0100477 Region CAN Supervisor Code

Description Weekly Inspection Facility ED Technician Code

Enterprise ENTERPRISE001 Estimate Duration 6M

Customer No. 10000 Start Date 2019-12-31

Lines Manage

Line No.	Step No.	Equipment ID	Technician Code	Enterprise	Region	Facility	Description	Do Not Show in Dis.	WP Quantity	Estimated Time	Billing Unit Price	Unit of Measure	Estimated Billing Price	Unit Cost	Estimated Cost	Actual Time	Actu
→ 1000	WP100003	EQ100012		ENTERPRISE001	CAN	ED	Electrical Inspection		0.00	500.00	0.00	HOURLY	0.00	\$0.00	25,000.00	0.00	

TAG Master files:

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

Dynamics 365 Business Central

CRONUS International Ltd. TAG Tasks TAG Planning **TAG Masters** TAG History TAG Maintenance Setup

TAG Equipment Overview TAG Equipment List TAG Personnel TAG Outside Service Providers TAG Consumables TAG Items TAG Tools

No. #	Description	Results Input Requir...	Test Description	Work Code	Equipment Group	Personnel Group	Standard Time	Estimated Step Time	Sub-Steps Exist	Expand Subst... to WO Line
WP100001	Meter Reading	<input checked="" type="checkbox"/>	Meter Reading				2.00	2.00	No	<input type="checkbox"/>
WP100002	Standard Inspection Work Task	<input type="checkbox"/>		INSPECT			0.00	1.00	No	<input type="checkbox"/>
WP100003	Electrical Inspection	<input type="checkbox"/>					0.00	0.00	No	<input type="checkbox"/>

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

Dynamics 365 Business Central

CRONUS International Ltd. TAG Tasks TAG Planning **TAG Masters** TAG History TAG Maintenance Setup

TAG Equipment Overview TAG Equipment List TAG Personnel TAG Outside Service Providers TAG Consumables TAG Items TAG Tools

ID	Description	Field 1 Lookup	Hierarchy Parent	Master ID	Level	Duty Type	Duty Type Status	Out of Serv...	Model Number	Equipment Group	Equipment Subgroup	Warranty Expiration Date	War...	Company ID No.	Ents
ZEQ100002	Default Equipment 2-so...	<input type="checkbox"/>	ZEQ100002	ZEQ100002	1	Continuous	Active	<input type="checkbox"/>	TEST	EQGRP002	TEST	2019-11-14	<input checked="" type="checkbox"/>	TEST	E
ZEQ100001	Default Equipment - su...	<input type="checkbox"/>	ZEQ100001	ZEQ100001	1	Continuous	Active	<input type="checkbox"/>		EQGRP002			<input type="checkbox"/>		E
ZEQ100003	SubAssembly of ZEQ1000...	<input type="checkbox"/>	ZEQ100001	ZEQ100001	2	Continuous	Active	<input type="checkbox"/>		EQGRP002	TEST		<input checked="" type="checkbox"/>	TEST	E
EQ100012	Cat Excavator***	<input type="checkbox"/>	EQ100012	EQ100012	1	Continuous	Active	<input type="checkbox"/>		EXCAVATOR			<input type="checkbox"/>		E
EQ100013	Cabin 322CL	<input type="checkbox"/>	EQ100012	EQ100012	2	Continuous	Active	<input type="checkbox"/>		BODY			<input type="checkbox"/>		E
EQ100014	Heater System 322CL	<input type="checkbox"/>	EQ100012	EQ100013	3	Continuous	Active	<input type="checkbox"/>		ELECTRICAL			<input type="checkbox"/>		E
EQ100015	Seat 322CL	<input type="checkbox"/>	EQ100012	EQ100013	3	Continuous	Active	<input type="checkbox"/>		BODY			<input type="checkbox"/>		E

General

ID	EQ100012	Enterprise	ENTERPRISE01	Equipment Group	EXCAVATOR
Hierarchy Parent	EQ100012	Address		Equipment Subgroup	
Hierarchy Parent Description	Cat Excavator***	City		Equipment Configuration	
Master ID	EQ100012	State		Duty Type	Continuous
Level Parent Description	Cat Excavator***	Country Code		Service Agreements	0.00
Description	Cat Excavator***	Zip Code		Assigned Technician	
Facility	ED	Compliance Code		Use Assigned Technician	<input type="checkbox"/>
Region	CAN	Compliance Status			

Source

Purchased from OSP		Manufacture Date	2019-11-01	Anticipated Replacement	
Purchased from Vendor		Equip. Serial No.	SN4567890	Annual Escalation %	0.00
Date of Purchase	2019-12-02	Install Date	2019-12-02	Projected Replacement C...	0.00
Purchase Cost	25,000.00	Warranty	<input type="checkbox"/>	Credit Memo No.	
Manufacturer	ABC	Warranty Expiration Date			
Model Number	DEF1543	Expected Life Years	0		

Control

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

Dynamics 365 Business Central

CRONUS International Ltd. TAG Tasks TAG Planning TAG Masters 1 TAG History TAG Maintenance Setup

TAG Equipment Overview TAG Equipment List TAG Personnel TAG Outside Service Providers 2 Consumables TAG Items TAG Tools

No. 1	Name	City	State	ZIP Code	Phone No.	Search Name
OSP001	Default Outside Service Provider					

CRONUS International Ltd. TAG Tasks TAG Planning TAG Masters TAG History TAG Maintenance Setup

TAG Outside Service Providers: All Search **New** Delete Open in Excel More options

No. 1	Name	City	State	ZIP Code	Phone No.	Search Name
OSP001	Default Outside Service Provider					

← ...VIDER CARD | WORK DATE: 2021-01-28 ✓ SAVED

OSP001

Statistics More options

General

No. OSP001

Name Default Outside Service Provider

Address

City

State

ZIP Code

NAV Vendor No.

Type Both

Blocked

	HEADER REQUIREMENTS	LINE REQUIREMENTS
Planned Work Orders	0	0
Released Work Orders	0	1
Finished Work Orders	0	1
Assigned Date Meters	0	0

Communication

Tax

Cost

Charge Type	Hour	Posting Code	
Flat Rate Charge	0.00	Purchasing Type	
Hourly Rate	0.00	Purchasing G/L Acct...	

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



Dynamics 365 Business Central TAG Consumables

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

TAG Consumables: All Search + New Manage Page Navigate Show fewer

NO.	DESCRIPTION	SEARCH DESCRIPTION
CON10001	OIL	OIL

Dynamics 365 Business Central TAG Consumables CON10001

HOME NAVIGATE

NEW - TAG CONSUMABLE CARD - CON10001

CON10001

General

No.	CON10001	Unit of Measure Code	
Description		Item Category Code	
Navision Qty On Hand	0.00	Work Procedures	0
Qty on Planned Orders	0.00	Assigned Templates	0
Qty on Released Orders	0.00	Date Meter Policies	0

Cost

Purchase Cost	0.00
Cost When Consumed	0.00

Dynamics 365 Business Central TAG Items Item Card

HOME ACTIONS NAVIGATE REPORT

NEW - ITEM CARD

Item Card

Item

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

Inventory

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

Costs & Posting

COST DETAILS

Costing Method	FIFO	POSTING DETAILS	
Standard Cost	0.00	Gen. Prod. Posting Group	*
Unit Cost	0.00	Tax Group Code	
Net Invoiced Qty.	0	Inventory Posting Group	*

Prices & Sales

Unit Price	0.00	Special Sales Prices & Discounts	Create New...
Profit %	0.00		

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:

Dynamics 365 Business Central Extensions		
CRONUS Canada, Inc. Finance Cash Management Sales Purchasing Self-Service Setup & Extensions Maintenance Setup Maintenance Labour Maintenance Equipment		
Extensions: All	Search	Manage Page
ADDITIONAL INFO	NAME	VERSION
Installed	Ceridian Payroll	v. 2.0.21812.0
Installed	Dynamics GP Data Migration	v. 2.0.21812.0
Installed	Envestnet 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:

Dynamics 365 ▾ Business Central Extensions		
CRONUS Canada, Inc. Finance ▾ Cash Management ▾ Sales ▾ Purchasing ▾ Self-Service ▾ Setup & Extensions ▾ Maintenance Setup ▾ Maintenance Labour ▾ Maintenance Equipment ▾		
Extensions: All Search Manage ▾ Page ▾		
ADDITIONAL INFO	NAME	VERSION
Installed	...	
Installed	Ceridian Payroll	v. 2.0.21812.0
Installed	Dynamics GP Data Migration	v. 2.0.21812.0
Installed	Envestnet 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 .

