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.



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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



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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
- Assign the validating user profile 'Business Manager'
- (from settings or user personalization's)
- \circ $\;$ Restart D365 by sign out and sign in.

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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.

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Tag Initial Data and Master Code Setup:

Summary Insight Note For Review Testing:

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

Before any portion of TAG can be used

a. the ADMIN USER must open page TAG Control to initialize Tag Plan to Express.

Note: Express is designed for review testing of the Tag Maintenance Base Software. For CMMS (base) or EAM (advanced) purchased Key Contact VSD to access additional functionality without Express restrictions. The restrictions for Tag Plan Express are detailed in Appendix 1 below.

b. <u>The ADMIN USER must add Tag users manually on the Tag Licensing page:</u> Note:

> adding the tag user will apply the Tag Permission set's to the user, which will in turn allow the user to initialize Tag starting data in the following steps.

c. <u>The ADMIN USER must set up some initial data and users on page Tag User setup.</u> 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. <u>To Set Tag Plan to Express</u> 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 <u>Initial Data Setup</u>.

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: <u>https://www.theassetguardian.com/</u>

by phone at <u>+1-450-419-5559</u> or <u>+1-866-444-2366</u>

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
- o Expiry date will be populated
- Expiry reminder will be populated



o 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

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Apply Tag Plan Key if purchased.

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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:

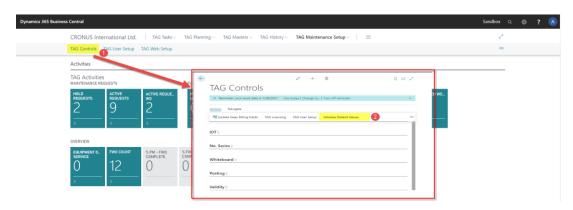
- 1. Open page Maintenance Setup> Tag controls (confirm Tag Plan has a value: Express, CMMS, EAM)
- 2. On the ribbon click on Actions > button 'Initialize Default Values'

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

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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)

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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.

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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:



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	Equipment ID · · · · · · Usager service web · · · · Usager service web · · · · ·	

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:

Tag_Sandbox		-			AG Maintenance Setup					
TAG Planned Worl TAG Released Wor			ders TAG Work Ord TAG Failure Co		TAG Fault Entry TAG Failure Code St		Fault Entry L	og		Â
TAG Requests : A	II 🗸 🕴 🔎 Search	New 🗸 🔋 🔋 Dele	ete Process V Nav	igate 🗸 🛛 🚺 Oper	in Excel					♥ ■ 0 0 2
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Company ID			request for equipment		No. of Child Work Or	0	~
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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 Busines	s Central									
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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

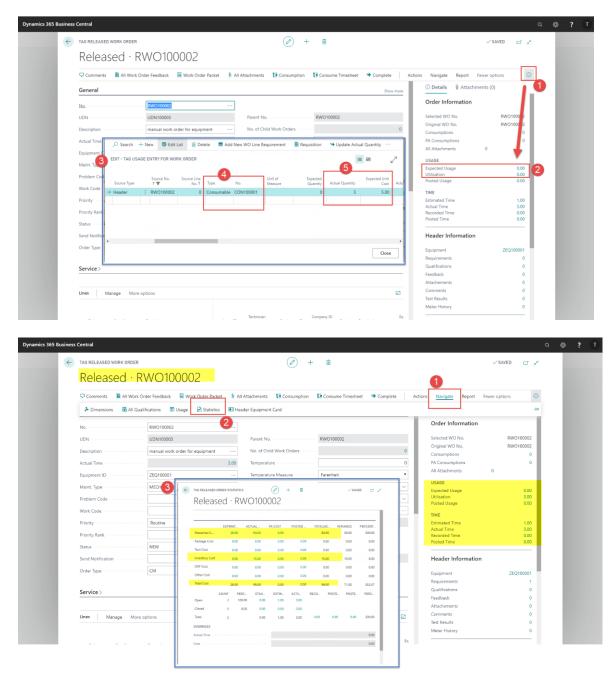
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Note: if Tag Plan = express, there are limitations as noted in section 5. Appendix 1.



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

Equipment >

Scheduled

Supervisor Code

Personnel Group

Technician Code

Order Date

OSP No.

ELECTRICAL

PERS001

5/7/2020

5/7/2020

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4000 Louis B. Mayer Laval, QC (Canada) H7P 0J1

Due By Date

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Starting Time

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Ending Time

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TIME Estimated Time Actual Time Recorded Time Posted Time

Equipment Requirements Qualifications Feedback

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Default Equipment REG001 FAC000001

5/17/2020

5/7/2020

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Show more

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ZEQ100001



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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:

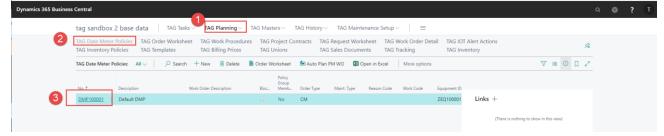
if reviewing under Tag Plan = express there is a limitation on number of DMP records (1) The limitation is removed when purchase Tag Plan CMMS or EAM. The intent is to allow testing review under Express.

- 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:





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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.

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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

- o 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.
- o Confirm the DMP Record values as in previous step.
- Goto Tracking fast tab on the target DMP card
 Check field Released WO to confirm a WO does not exist for this DMP.
 (the fields are a flow field to the WO list)



- Note: If a WO does exist, resolve by Completing or Deleting the record. If a WO does not exist, proceed to autoplan
- On the Ribbon for the DMP card click on action button 'Autoplan PM WO'
 On Autoplan PM WO dialogue box check that
 The policy No is the same as your target DMP
 The Evaluate through date is later than Next service date on the DMP
 Evaluate PM type = Date Meters
 Click ok on the Autoplan PM WO dialogue box
- A message will show indicating that a work order has been created. Default configuration is a Released work order.
- Return to the Tracking Fast Tab on the target DMP record and refresh the page Check Released WO field to confirm a WO now exists for this DMP record. (the fields are a flow field to the WO list)
- Drill into the WO list and open the WO card specific to the DMP
 The Description and Equipment should be the same as the source DMP
 In Tracking fast tab the field Policy no should be the same as the source DMP
- Complete the Released WO by clicking action button 'Complete' in the WO ribbon. This action will delete the RWO and create a FWO This action will update the DMP field 'Last service date' from the completed RWO Update of the last service date will calculate the next service date on the DMP.
- Return to the target DMP record
 Scroll down to the Values fasttab and confirm the last service date and next service date are updated
 Scroll down to the Tracking fast tab and confirm the finished work order.

Note:

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

Note:

If the message shows that 0 work orders were created, and there was an error. Check the DMP record> tracking fast tab> field Autoplan PM error Text. Resolve the error if related to setup or config.

If the message is 'you are not a licensed Tag user' check your user setup at the beginning of this document.

Note:

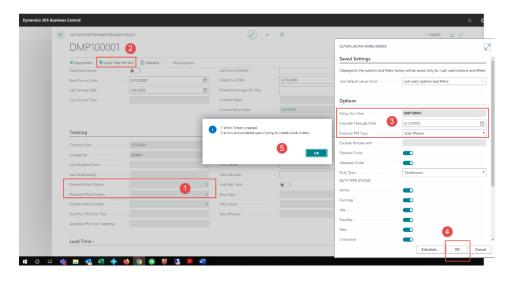
If the message shows that 0 work orders were created, it means that the system calculates that the PM is not due. Some typical reasons:



- Activate Date on the DMP = no or Blocked = yes
- To resolve change the field values on the DMP
- A PWO or RWO work order already exists for that DMP To resolve you can go to tracking fast tab as described and complete or delete the WO found.
- The target DMP equipment field values do not match the dialogue box filters Open the DMP Equipment

Check that the equipment fields Duty Type and Duty Status are as expected.

Create PM WO from DMP and Complete Steps



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Last Service Date 5/11/2020	Override Average Per Day	METER CHARACTERISTICS Type
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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:

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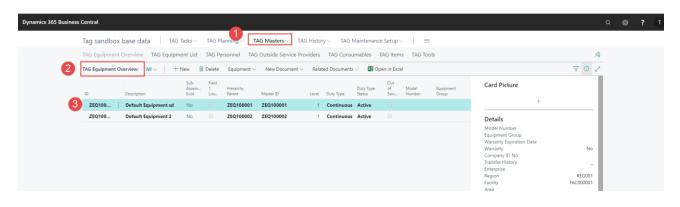


Reference Equipment Statistics

- 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:



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Open Equipment statistics:



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		Date of Purchase		Tool Costs			0.00	0.00	Tool			0.00	0.00	
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Equipment Analysis:

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*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:

<u>https://www.theassetguardian.com/</u> or by phone at <u>+1-450-419-5559</u> 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
- 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)

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	TAG Controls			0		
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	General					
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- 1	Start	OD	2 lock Job		TAG Plan Selector EAM	
- 1	Due By	10D	Allow Job Invoicing		Setup TAG Basic Values	
	Expiration	360D	Allow UDN Assignment		Dimension Source Code	
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	Allow Multi-Company		Integration Type	Basic V	Synch Field No.	
	Allow WO Union No.		Enable Condition Monitoring		Synch Field Name	
	Union No.	~	Equipment List Option	• Overview	Synch Field Filter Value	

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

1.866.444.2366 info@TheAssetGuardian.com TheAssetGuardian.com



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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.

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TAG Controls						
Actions Navigate						0
General >						
IOT >						
Technician Nos.	·	Work Procedure Nos.	TAG-WP V	Released WO Nos. TAG-RWC)	
Equipment Nos.	TAG-EQ ~	Maint. Substep Nos.	TAG-WPSS V	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 ~			
10011103.						

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.



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	TAG Controls							
	Actions Navigate							
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	No. Series							
	Technician Nos.		\sim	Work Procedure Nos.				
	Equipment Nos.	TAG-EQ	1 -	Maint. Substep Nos.				
	Facility Nos.	Code 1	Description					
	Consumable Nos.	TAG-CON	Consumable	A				
	OSP Nos.	TAG-DMP	Datemeter Policies					
	Tool Nos.	→ <u>TAG-EQ</u>	Equipment	· · · · · · · · · · · · · · · · · · ·				
	Document Tracking Nos.	TAG-FAC	Facilities					
	-	TAG-FWO	Finished Work Order	2 -				
	Whiteboard >	+ New		Select from full list				
	Posting >							
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Dynamics 365 Business Central

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TAG Controls		Eines 6						4	5	
Actions Navigate		Relationships	son	Starting No.	Ending No.	Last Date Used	Last No. Used	Def Nos.	Ma Nos.	
General >		→ TAG-EQ 2 :	Equipment 3	EQ100001	-	-	-	*	1	
		TAG-FAC	Facilities	FAC000001	-	2019-11-15	FAC000001	×.	1	
		TAG-FWO	Finished Work Order	FWO100001	-	2021-01-28	FWO100006	*		
IOT >		TAG-INS	Instrumentation	15000001	-	2021-01-28	15000001			
		TAG-OSP	Outside Service Providers	OSP000001	-	-	-	×.		
		TAG-PER	Personnel	PER100001	_	-	-	×.	×.	
No. Series		TAG-PRJ	Project Contract	PRJ000001	-	-	-	×.		
Technician Nos.		TAG-PWO	Planned Work Order	PWO100001	-	2019-12-31	PWO100003	8	1	
		TAG-REQ	Request	REQ100001	-	2019-12-30	REQ100508	y	1	
Equipment Nos.	TAG-EQ	TAG-RWO	Released Work Order	RWO100001	_	2021-01-28	RWO100016	\$	1	
Facility Nos.		TAG-TEMP	Template	TEMP100001	-	-	-	\$	1	
Consumable Nos.	TAG-CON	TAG-TOOL	Tool	TOOL100001	-	2019-11-15	TOOL100001			
Consumable Nos.	TAG-CON	TAG-UDN	Document Tracking	UDN100001	-	2019-12-31	UDN100478			
OSP Nos.	TAG-OSP	TAG-WP	Work Procedure	WP100001	_	2021-01-28	WP100002		1	
Tool Nos.	TAG-TOOL	TAG-WPSS	Work Procedure Substep	WPSS000001	_	_	-			
		TASK	Task	TD000001	TD999999	2020-01-01	TD000050	y	4	
Document Tracking Nos.	TAG-UDN	T-ORD	Transfer Order	1001	2999	2020-01-01	1010	y		
		T-RCPT	Transfer Receipt	109001	1010999	2020-01-01	109002	9		
Whiteboard >		TS	Time Sheet	TS00001	TS99999	_	-	1	1	
		T-SHPT	Transfer Shipment	108001	109999	2021-01-28	108005	1		
		VATPERIODS	VAT Return Periods	VATPER-0001	VATPER-9999	-	-	1		
Posting >		VATREPORTS	VAT Returns reports.	VATRET-0001	VATRET-9999	_	_	1		
		VEND	Vendor	V00010	V99990	-	_	1	1	



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		Sta †	Starting Date	Ť	Starting Date Starting N	Starting Date Starting No.	Starting Date Starting N. 2 Ending No. Last Date	Starting Date Starting NA2 Ending No. Used Used	Starting Date Starting N2 Ending No. Last Date Last No. Used Used Warning No.	Starting Date Starting N2 Ending No. Last Date Last No. 1 Warning No. Increment-by No.	Starting Date Starting NO2 Ending No. Last Date Last No. Used Used Warning No. No. No. No.

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

Whiteboard Fast Tab Setup on Tag Controls:

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

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	··· By Ticket No.

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



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TAG Controls		
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No. Series		
Whiteboard >		
Posting >		
Validity		
Require Items	Require Work Code on Order	Ask if Charges Pending
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Require Technician on Line · · · · · · · · · · · · · · · · · · ·	Allow Datemeter RWO post no line · · · ·	Cost Apvi Threshold
Require Tech/Vendor on Order · · · · · · ·	Allow Non-Policy WO Post	WO Prompt For Cascade EQ Change · · · ·
Require Equipment on Order	Create WO Default Type · · · · · · · Released 🔻	Use Consume Timesheet
Require Equipment on Line	Require Close all RWO lines · · · · · · · ·	WO Inherit Project UDN
Preventative Date Meter Setup >		

Setup of Tag User Setup:

- User Set-up \rightarrow 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.

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	CRONUS Inte	rnational Ltd.	TAG T	asks 🗸 🛛 TAG Plan	ning \smallsetminus	TAG	Masters	√ т	'AG Hist	ory 🗸	TAG N	lainten	ance Se	tup 🗸	=	=			
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	User ID †	User Name	Technician Code	Default Requester Text	Allow Cre WO from	Allow Equi Tran Move	Allow Equi Cha & li	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	
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Gen	eral						
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Last \	alidation Date	4/20/2020		Current TAG User Cou.			1
Expiry	Date ·····	4/28/2020		Employee Portal Users			2
Expiry	Reminder	4/21/2020	Ē	Current TAG Portal Us.			0
TAG F	lan · · · · · · · · · · · · · · ·	Express		TAG Mobile Users			0
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TAG I	Jsers						
						Employee	TAG
	User account 1			Company ↑	TAG User	Portal	Mobile
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<i>→</i>			÷				
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Setup of Maintenance Codes:

How to get there:

In the control page, Under Navigate, the user will see a number of sub menus lists, one for each code that must be set-up in Tag.

General instructions on how to set up the codes:

- Select the list
- Select 'new' on the action bar
 - Some codes will open a card to fill in the values
 - 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 \rightarrow these codes define the location of the equipment
- Personnel \rightarrow 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.



"Maintenance Setup" Menu:

CRONUS Internat		TAG Tasks ∨	TAG Planning \vee	TAG Masters \lor	TAG History \vee	TAG Maintenance Se	tup∨ 📃 🚍					
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WO.												
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REQUESTS RI	EQUESTS		PENDING APP_ WORK ORDERS	PLANNED WO ORDERS	PM PLANNED _ ORDERS	M RELEASED	RWO OVERDUE	PM RELEASED WO	RELEASED WO_ ORDER 0		% PM - FWO COMPLETE	X FWO COMPLETE
Insights												
	nance 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.

Dynamics 365 Business Central		Sandbox
CRONUS International Ltd. TAG Tasks 🗸 TAG Planning 🗸 TA	AG Masters 🗸 TAG History V TAG Maintenance Setup	2
Activities TAG Activities MAINTENANCE REQUESTS UNDENANCE REQUESTS ACTIVITIES ACTIVITES ACTIVITIES	AG Controls ors <u>Mroget</u> 3 AG Location Code Setup V TAG Document Code Setup V TAG Labor Code Setup V TAG Regions TAG Areas TAG Areas TAG Interprise ItaG Enterprise ItaG En	S Report Report Its Report
Insights	sting >	



TAG FACILITIES WORK DATE: 2021	1-01-28					
	e 🚺 Open in Excel	More options				
Code †	Name		Parent Facility Code	Region	Enterprise	Default item Category
ATL					(<i>i</i>) +	8
ED		TAG Facility	Card		<i>•</i> +	
FAC000001	Defaul	IAG Facility	Caru			
FAC000002		Navigate				
FAC001	Defaul	General				Show more
FAC002	Defaul	Code ····· *		Country Code		Create Purchase Order
FAC51223323432113556	FAC51	Name Address		Region		Zip Code
LON		City		Personnel Group		Slock Job
		State ·····		Temperature Measure	t v	
TOR	:	Communication				
		Phone No.		Fax No.		E-Mail
		Phone No. 2		Telex No.		Contact
		Posting >				
		Validity				
		Require Navision Items		Default Labor Rate	0.00	Item Category Filter · · · · · ·
		Navision Location	~	Default Template	~	Manage Consumption Or · (
		Purchasing Defaults >				
		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.
 - Add a code with description
- Close the page and refresh the list to validate.

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TAG Controls		~
Actions Navigate		
TAG Location Code Setup \sim TAG Equipment Code Setup \sim TAG E	ocument Code Setup \lor TAG Web Setup \lor TAG Labor Code Setup \lor	
III TAG Facilities		
III TAG Regions		
III TAG Areas		
III TAG Lines		
III TAG Enterprise		
Whiteboard >		
Posting >		
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Require Items	Require Work Code on Order	ng



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		Code †			÷	TAG REGION	S LIST WOR	K DATE: 2021-0	11-28					
		CAN REG001 REG002				, ⊂ Search	+ New	💀 Edit List	🔋 Delete	n Comme	nt 🚦 Open in	Excel More options		
		USA					Code †					Description		
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							REG001					Default Region		
							REG002							
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Follow the same steps to manage Tag areas, Tag Lines and Tag Enterprise.

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	TAG Contro	S						
	Actions Navigate							
	TAG Location Code Setup \smallsetminus	TAG Equipment Code Setup \smallsetminus	TAG Document Code Setup \smallsetminus	TAG Web Setup \smallsetminus	TAG Labor Code Setup 🗸			
	TAG Facilities							
	III TAG Regions							
	III TAG Areas							
	III TAG Lines							
	III TAG Enterprise							
	Whiteboard >							
	Posting >							
	Validity							
	Require Items			Require Work Code	on Order	\supset		Ask if Charges Pending
	Require Supervisor on Order …			Approval Required		\supset		WO Line Act. Time Maxim

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.



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TAG Contro	ls					
Actions <u>Navigate</u>						
TAG Location Code Setup \smallsetminus	TAG Equipment Code Setup \sim	TAG Document Code 5	Setup 🗸 🛛 TAG Web Setu	p 🗸 🛛 TAG Labor Code S	etup 🗸	
-	III TAG Equipment Groups	2				
IOT >	III TAG Equipment Subgroups					
	III TAG Main Codes					
No. Series >	III TAG Primary Codes					
	TAG Secondary Codes					
Whiteboard >		C TAG EQUIP	MENT GROUPS I WORK DATE: 2021-01-28			
		3	+ New 🗭 Edit List 🔋 Delete	Comment Equipment Labels.	📲 Equip. Subgroups	Open in Excel
Posting >			Code 1		Description	
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Validity			BUILDING			
F			CAVITY			
Require Items			COOLING			
			CORE			
Require Supervisor on Order · ·			ELECTION			
			ENGINE			
Require Technician on Line			EQGRP001		Default Equipment	
Require Tech/Vendor on Order			EQGRP002 EXCAVATOR		Default Equipment (Group 2
require recryterioor off offder			EXCAVATOR			
Require Equipment on Order			FIXED		Fixed	
			FORKLIFT		Forklift	
Require Equipment on Line			Require Close	e all RWO lines	. 🕒	

Folow 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.



Actions Navigate	1		
TAG Location Code Setup \checkmark — TAG Equipment Code Setup \sim	TAG Document Code Setup \sim	TAG Web Setup \sim — TAG Labor Code Setup \sim	
	III TAG Failure Codes		
< TOI	III TAG Failure Priorities		
	III TAG Maintenance Types	2	
No. Series >	III TAG Meter Types		
	III TAG Operator Fault Entry		
Whiteboard >	TAG Order Types	TAG MAINTENANCE TYPES WORK DATE 2021-01-28	
	III TAG Problem Codes	P Search + New 3 List € Delete Ø Open in Excel	
Posting >	TAG Reason Codes		
	TAG Skill Codes	Coost Description → Itter 4 : Bectricat	6
Validity	TAG Status Codes	MECH Mechanical	
Require Items	TAG Weather Conditions		
Require Supervisor on Order	TAG Work Codes		
Require Technician on Line 🌕	TAG Bank Priorities		
Require Tech/Vendor on Order	TAG Posting Codes	Allow Non-Policy WO Post	WO Prompt For Cascade EQ Change · · · ·
Require Equipment on Order	TAG Certification Codes	Create WO Default Type · · · · · · · Released	Use Consume Timesheet
Require Equipment on Line	In TAG Certification Codes	Require Close all RWO lines	WO Inherit Project UDN

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.

TAG Controls					
Actions Navigate					
TAG Location Code Setup V TAG Equipment Code Setup	TAG Document Code Setup ~	TAG Web Setup \lor TAG Labor Code S	ietup 🗸		
	TAG Failure Codes				
<pre>> </pre>	III TAG Failure Priorities				
	TAG Maintenance Types				
No. Series >	III TAG Meter Types				
	TAG Operator Fault Entry				
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	III TAG Problem Codes				
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Require Items	TAG Weather Conditions	→ PLANNED PM	E Corrective Maintenance 5 Parreed Maintenance Preventative Maintenance	0 0 0	Nai Notifas



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

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TAG Controls							
Actions Navigate 1							
TAG Location Code Setup \checkmark — TAG Equipment Code Setup \checkmark	TAG Document Code Setup \sim	TAG Web Set	up \checkmark TAG Labor Code Setup \checkmark				
	III TAG Failure Codes						
IOT >	TAG Failure Priorities						
	III TAG Maintenance Types						
No. Series >	III TAG Meter Types						
	III TAG Operator Fault Entry						
Whiteboard >	TAG Order Types						
Posting >	TAG Problem Codes						
Validity	- IIII TAG Reason Codes -						
	III TAG Status Codes	2 – F	TAG STATUS CODES WORK DATE: 2021-	01-28			
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Require Supervisor on Order	III TAG Work Codes	pro	Status Code 1		Description	Style Code	Туре
Require Technician on Line	III TAG Rank Priorities	Allow				5 Standard	6 • Work Orde
Require Tech/Vendor on Order	TAG Posting Codes	Allow	COMPLETED		Assigned Request	Standard	Work Orde
Require Equipment on Order	TAG Certification Codes	Create	DONE REQ ESCALATE		Done Request Escalate Request	Blue	Request
Require Equipment on Line	TAG Batches	Requir	HOLD REQ INPROGRESS		Hold Request	Blue + Bold	Request Work Orde
			NEW NEW REQ		New Request	Red + Italic	Work Orde Request
Preventative Date Meter Setup >			STARTEDREQ		Started Request	Blue + Italic	Request

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

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TAG Co	ntrols							
Actions Navigate	0							0
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			III TAG Personnel	•				
< TOI			TAG Personnel Group	2				
No. Series >								
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Posting >			🔋 Delete 🛛 📓 Open in Excel					
Validity		Code 1 4 Description 5	6 2nd Level Escalation Unit Cost User	2nd Level Escalation Email	2nd Level Escalation Threshold 2nd level Escalation 1	3rd Level Escalation fessage User	3rd Level Escalation Email	3rd Level Escalation Threshold
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	n Order		Default Type Rele			Timesheet		
Require Equipment o	n Line 🌑	Require Clo	se all RWO lines		WO Inherit P	oject UDN		

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.



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	quipment on Line				RWO lines · · · · · · · ·					UDN		
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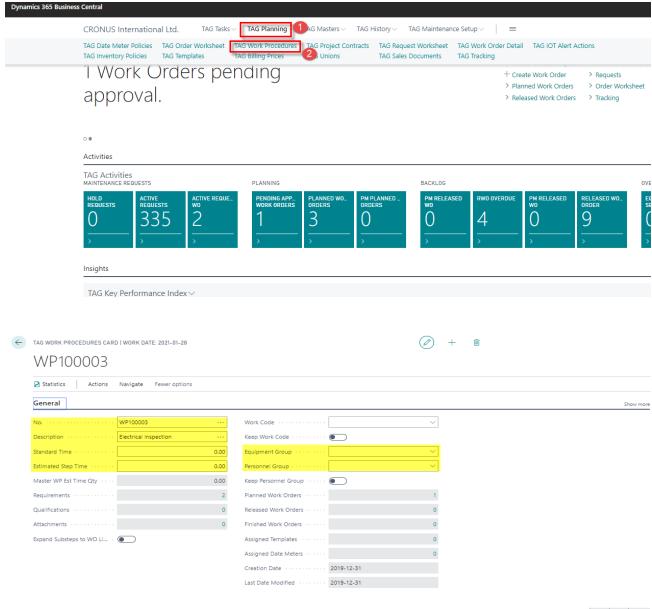
TAG Work procedure:

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).





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

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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.



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Note:

Work procedure, templates \rightarrow 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:

- o 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:

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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.

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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

- o 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:

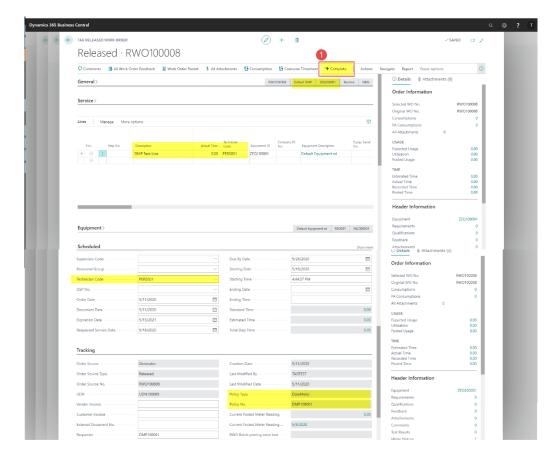
- Activate Date on the DMP = no or Blocked = yes To resolve change the field values on the DMP
- A PWO or RWO work order already exists for that DMP To resolve you can go to tracking fast tab as described and complete or delete the WO found.
- The target DMP equipment field values do not match the dialogue box filters Open the DMP Equipment

Check that the equipment fields Duty Type and Duty Status are as expected.

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Preventive work order (PM)

Alternative PM generation methods

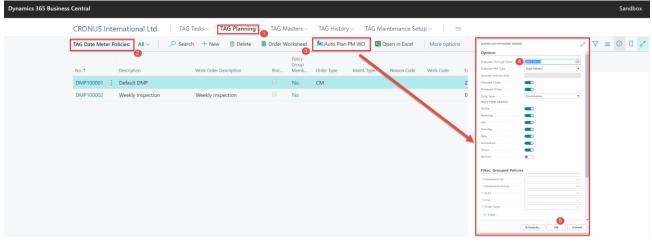
AutoPlan PM Work Orders from DMP list:

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

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



Steps: Tag AutoPlan – from DMP list



Plan PM WO from Order Worksheet:

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

Steps:



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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.

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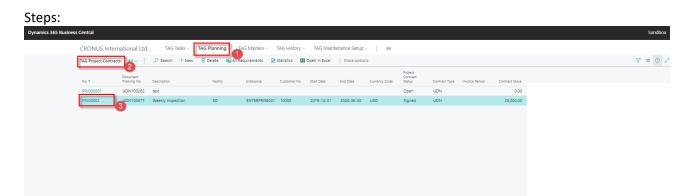
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Create WO from Project Contract:

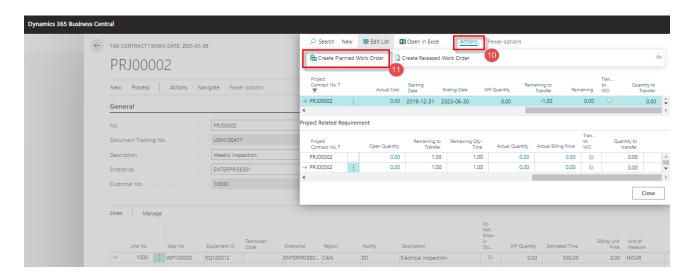
- Start from Tag TAG Maint. Manager Role Center Profile.
- Go to the TAG Planning Section and click on the TAG Project Contract menu.
- Select one project contract and click on the **No** field to open the card.
- Click More Options, Actions and then Create Work Orders buttons
- In Project Worksheet 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



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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.



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TAG Master files:

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

TAG Equipmer	nt Ove	view TAG Equipment List	TAG Personnel	TAG Outside Service Providers	TAG Consumat	oles 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	Expan Subst. to WO Line
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WP100002		Standard Inspection Work Task			INSPECT			0.00	1.00	No	
WP100003		Electrical inspection						0.00	0.00	No	

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.

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Level Parent Description	Cat Excavator***	Country Code	·	Service Agreements	(
Description	Cat Excavator***	Zip Code ·····		Assigned Technician	
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Date of Purchase	2019-12-02	Install Date	2019-12-02	Projected Replacement C	(
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Manufacturer	ABC	Warranty Expiration Date			
Model Number	DEF1543	Expected Life Years		2	

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.

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Hourly Rate		0.00 Purchasing G/L Acco	~				

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.



Cynamics 36	5 - Business Central	TAG Consuma	DIES									Q (D) ⊯
	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		Page 🗸	Navigate \smallsetminus	Show fewer					1	≡ 2
	NO. 2		3			DESCRIPTION				SEARCH DESCRI	PTION	
	CON100001					Oil				OIL		
Dynamics 365	 Business Central 	TAG Consumables	> CON10001									9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9
HOME NAVIGATE												
Edit New State	atics Previous Next											
Manage Pro	HABLE CARD - CON10001											^
												×
CON10 _{General}	001											
No.			CON10001					Unit of Measure Code				-
Description Navision Qty On Hi	and .		l				0.00	Item Category Code Work Procedures				
Qty on Planned On							0.00	Assigned Templates				0
Qty on Released Or	ders						0.00	Date Meter Policies				0
Purchase Cost							0.00					
Cost When Consun	red						0.00					
Dynamics 3	65 v Business Cen	tral TAG Iter	ms > Item Card									
	NAVIGATE REPORT											
Edit New	Attachments Attributes Adjust	inactial Set Secondal Sec		J	el Approval Reques xe a Flow	t Previous Next						
Manage	Item	special set special spe ces Discounts Special Sales Pricer	cial Prices & Discounts Send A Overview Req 8 Discounts	Request Ap		Page						
NEW - ITEM CAR	D											×
× If you want	, we can assign attributes based	on the images yo	u import for items and c	ontacts. Ena	able Don't asl	k again						~
ltem (lard											
ltem												Show more
Description		k	<					Base Unit of Measure		*		-
Blocked							¥	Item Category Code				-
Туре			Inventory				•					
Inventory Inventory							0 >	Unit Volume				Show more
Stockout Warnir	9		Default (Yes)				•	SAT Item Classification				
Costs & Post	ing											Show more
COSTDETAILS	-							POSTING DETAILS				
Costing Method			FIFO				•	Gen. Prod. Posting Group		*		
Standard Cost Unit Cost							0.00	Tax Group Code Inventory Posting Group		*		
Net Invoiced Qt	1.						0					
Prices & Sale	15											Show more
Unit Price							0.00	Special Sales Prices & Disco	ounts	Create New		
Profit %							0.00					
Replenishme	nt >											



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 V	Business Central	Extensions						
CRO	DNUS Canada, Inc.	Finance \lor Cash Management \lor	Sales ~ Purchasing ~	Self-Servi	e V Setup & Extensions V	Maintenance Setup ~	Maintenance Labour 🗸	Maintenance Equipment
Exte	<mark>nsions: All</mark> 🔶 🔎 Se	earch Manage \vee Page \vee						
ADD	DITIONALINFO			NAME				VERSION
Inst	alled			··· Ceridia	n Payroll			v. 2.0.21812.0
Inst	alled			Dynam	ics GP Data Migration			v. 2.0.21812.0
Inst	alled			Envest	et Yodiee Bank Feeds		v. 2.0.21812.0	
Inst	alled			Essent	al Business Headlines			v. 1.0.21812.0
Inst	alled			Image	Analyzer			v. 1.0.21812.0
Inst	alled			Micros	oft Pay			v. 2.0.21812.0
Inst	alled			PayPal	Payments Standard			v. 2.0.21812.0
Inst	alled			Quick	ooks Data Migration			v. 2.0.21812.0
Inst	alled			Quick	ooks Online Data Migration			v. 2.0.21812.0
Inst	alled			Quickt	ooks Payroll File Import			v. 2.0.21812.0
Inst	alled			Sales a	nd 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 V	Business Central	Extensions							
CF	RONUS Canada, Inc.	Finance v Cash Management v	Sales ~ Purchas	ing v Se	elf-Service 🗸	Setup & Extensions ~	Maintenance Setup 🗸	Maintenance Labour ~	Maintenance Equipment ~
Ext	<mark>tensions: All</mark> / $ \wp $ Sea	arch Manage \vee Page \vee							
AL	DDITIONALINFO				NAME				VERSION
In	istalled				Ceridian Payro	511			v. 2.0.21812.0
In	istalled				Dynamics GP	Data Migration			v. 2.0.21812.0
In	istalled				Envestnet Yod	lee Bank Feeds			v. 2.0.21812.0
In	istalled				Essential Busin	ness Headlines			v. 1.0.21812.0
In	istalled				Image Analyz	er			v. 1.0.21812.0
In	istalled				Microsoft Pay				v. 2.0.21812.0
In	istalled				PayPal Payme	nts Standard			v. 2.0.21812.0
In	istalled				QuickBooks D	ata Migration			v. 2.0.21812.0
In	stalled				QuickBooks C	nline Data Migration			v. 2.0.21812.0
In	stalled				Quickbooks P	ayroll File Import			v. 2.0.21812.0
In	stalled				Sales and Inve	ntory Forecast			v. 2.0.21812.0
In	stalled				The Asset Gua	rdian (TAG) - CMMS			v. 1.0.0.0

• You should have the new version with restored data .

