VIDEO TRANSCRIPT

Hi, this is Karel from Dynaway, and if you're watching this video, you're likely interested in our EAM for BC.

It's a good thing that you found this video because this is not only a demo of the system, but you can also use it as a tutorial to learn how to work with it by yourself. After watching this video, you'll be able to work with Assets and Work Orders; you'll be able to post hours Items and expenses if you're an Asset Technician and as an Asset Manager, you'll be able to plan future Work Orders - I'll show you how the system can create a Work Order every week - and you'll also be able to view the historical data in the system.

If you haven't done that so far before we go further, I highly recommend you going to AppSource and downloading our EAM into your BC, so that you can follow all the steps that I'll be showing you in this video. And then, you will either need to install a demo database into the EAM - you can do that with a click of a button on our license page or you can go into assisted set up and set up the system the way that you want it to be.

And now let's get into it!

Dynaway's EAM for BC generally consists of four essential components - Assets, Work Order Plans, Work Orders, and Posted Work Orders. These four components will help you store the information about your Assets, plan your maintenance, execute work and collect data, and review the effectiveness of your maintenance. The importance of each of those components will differ for you based on your position in a maintenance organization. There are two role centers for maintenance employees in EAM for BC:

- Asset Manager
- Asset Technician

For Asset technicians, most often, only Assets and Work Orders are important. Assets store information about the equipment that has to be maintained. For example a picture of the Asset, where it's located, what condition it's in, how is it related to other Assets, and which spare parts can technicians use on the Asset.

Work Orders contain information about the work that needs to be done to service and repair Assets. Instructions on Work Orders tell technicians how to carry out the work. When done with a task, workers fill in time spent, Items used, and any other expenses directly into each Work Order.

But if you're a maintenance manager, you're not only interested in Assets and Work Orders. You also need to plan future Work Orders and review the effectiveness of your maintenance.

We will go through the system both from the perspective of a technician and from the perspective of a planner or a maintenance manager. To choose between the Asset Manager and Asset Technician, click onto the gear icon, my settings, and choose the role under "role." Either as an Asset Manager or as an Asset Technician. First, let's go through a system from the perspective of a technician. And first of all, let's have a look at Assets.

To open Assets, we can click here to open them as a list or as a tree.
First, let's have a look at them in the form of a tree. We can, for example, open planter mixers at Hall 1 - which is not an actual physical Asset but a "Virtual Asset" - which means that it works as a folder for the actual physical Assets below it. These four planetary mixers A200 can actually be found on the floor. Transmission gears and motor gears are "child Assets" of each of the Planetary Mixers, each of which also has other child Assets. If there are Work Order Plans, Items, Documents, Downtimes, or Requests connected to an Asset, you will also be able to view them in the Asset Tree.

Not only that, but you can also open specific Work Order Plans and see specific Work Orders created from the Work Order Plans, specific Items entered on a Work Order Plan same with Resources, Documents, and Frequencies. You'll also be able to see the same on Work Orders. You can edit which of those you see in Process - Tree Options.

Let's say that the technician identified that this Asset is not working as it should. In that case, he can click on the process here on the top, create a Work Order specifically for this Asset as well as register downtime, or open an Asset Card of this Asset.

The Asset Card can be opened from many other places as well. Usually by clicking on the number of an Asset. But now let's try and open it from the list of Assets - by clicking on Assets and Assets. This is how the Asset List looks like. Let's open this Ultraviolet Lamp at Hall 1. This is how an Asset Card looks like - you can see the Description of the Asset, its Status, Condition, the Asset's Category, information about and from the manufacturer.

You can see the location, which can be entered either in the form of an address and viewed on a map through clicking here, or through GPS coordinates and clicking here which will, by default, open Bink maps, and we can start navigating. Below the location, we can see Counters which can be used to store, for example, running hours or mileage and they can be used in Work Order Planning to create Work Orders when the Asset is in a particular condition. Below the counters are Items where spare parts of the Asset can be written.

This way you won't have to look for them every time. On the right side, you can see a picture of the Asset, Work Order Statistics show the information about Work Orders connected to this Asset. And what you should know is that each Work Order is always connected to exactly one Asset. In case a company wants to track values about an Asset for which there are no fields in the Asset card, they can use Asset Attributes.

So, for example, you can see that for UV lamps, this company is tracking the year of production, voltage, and plug type. These can be set by default through category codes - so, for example, if we switch the Category to "Ovens," you can see that ovens have different default Asset Attributes. Any kind of value can be added to the Asset Attributes if you want to. Below the Asset Attributes, you can see this Asset in relation to other Assets -Its Child Assets and its Parent Assets and below these, you can see the Assets Documentation. These were the basics of an Asset Card and about Assets and now I will talk about Work Orders, how they look like and how to work with them.

On Work Orders, technicians can find all the information they need to service and repair Assets. They can also easily post the consumption of Items and the time they spend on a task. I switched to a tablet, just so that you can see the system from this point of view.

This is how a technician would see the system. To view the Work Orders, we can either click here on "Assigned to me" or scroll down to see the Work Orders in a table. So let's click on the second Work Order here. This is how a Work Order looks like. On the right side, you can see the details of the Asset to which this Work Order is connected.

So all this information can be found on the Asset Card. From here, you can open the Asset Documents, you can also see the location of the Asset and start navigating to it, you can see other Work Orders connected to the same Asset and work order documents, which are separate from the Asset Documents.

To the main part of the Work Order, here you can see the general information. I'll just click here on the top right to see all the available information. So: Information about the Asset, the status of the work, and in case the work can't be done at the moment we can choose waiting and choose a reason for why it can be done at the moment.

We can see the planned date - which is the date the maintenance manager said this Work Order to be executed." Originally planned date" is the planned date that was calculated by the system.

So in case, the work needs to be postponed to a later date, this is where you can find when the work should have originally been done. The category of the work and its priority - Both of these can be used to filter through a list of Work Order Plans so that you can find the Work Order (Plans) that you're looking for and the priority can help you to decide which work needs to be done first.

On the right side, you can see the Location from which the spare parts (=Items) will be consumed. In "frequency," we can see the way the Original Planned Date was calculated.

In this case, it's "Calendar" - which means that it occurs, for example, every Monday and Tuesday, weekly or twice a year. This also might be the reason why this Work Order was released in the first place. But I will talk about this later when I talk about Work Order Plans.

And here we can see if the Work Order is correct with maintenance or not. Corrective maintenance Work Orders will be prioritized in the Work Order planning process, and therefore send out the workers usually first. We can also enter Downtime here, and we can also see the Work Order Plan from which this Work Order was created. But I also get to that later alongside the frequencies.

Below the general information are the instructions written by the maintenance manager. Below those are Items and Resources. So Items which the maintenance manager was expecting that will be used during the Work Order - including quantity - and Resources that will perform the task, including the number of expected hours. Below Items and Resources, we can also add additional expenses. This could be for example external work or expenses on hotels.

Next to the quantities in Items and Resources are also quantities to consume. Which is the place for workers to write the actual quantity of consumed spare parts and the amount of hours spent on the task. These fields make it easy for the workers to post the actual consumption.

After filling in the Resources, Items, and Expenses, the worker can click here, scroll down, choose "Post/Close". Here he can choose if he just wants to post the Items or Resources, or close the Work Order or post and close the Work Order. After that, he's prompted to write remarks - he is able to change the posting date and Condition, and Status of the Asset. He can also choose to change the status of child Assets of this Asset.

That was from a perspective of a technician. I mentioned many details that are much easier to understand when we look at the system from the perspective of a planner or a maintenance manager. So let's continue from that perspective.

Work Order planning always starts with a Work Order Plan. Work Orders can be sent out to workers or worker groups; at different frequencies; either automatically or after approval from the maintenance manager. There are several frequencies available in the system: a One-off, periodically - which is called a Calendar - or through Counters and Measurements. Counters and Measurements can be used in the EAM to set up condition-based maintenance.

In their case, Work Orders are sent out when equipment is in a particular condition. Let's have a look at a specific example.

A Maintenance Manager wants to lubricate a transmission gear every 50 running hours. Then he would set up a Work Order Plan on the Asset transmission gear, with a Frequency "counter." When the system sees that the counter on the transmission gear reached 50 running hours, a Work Order is created. The Work Order can be then assigned - automatically or after the maintenance manager's approval - to a specific worker - for example "John" - or a worker group - for example "Technicians". This is specified on the Work Order Plan as well. So that's how a specific worker receives a specific Work Order.

Most of our customers want to primarily use periodic frequencies in our maintenance systems. So let's have a look at how you can set up Work Order Plans so that they generate Work Orders periodically. To create a Work Order Plan go to Work Orders and Work Order Plans and click "new". If you have number series set up, you can just click on the description, and the Work Order Plan number fills in by itself. Then type in the description choose the Asset, Category Code and Priority Code, optionally fill in the instructions, and here we are at frequencies. To create a periodic Work Order Plan, select "Calendar" and then click on "No" under Schedule.

By default, you will see Daily here. If you want a Daily frequency, you can change it here on the bottom but we want a Weekly one, so we will click here on the three dots and click on Weekly.

Under the General tab, you can fill in an end date if you want the Work Orders to stop being generated on a specific day. But we will leave this blank because we want the Assets to be cleaned as long as we have them. And under the weekly tab, we can choose the distance between weeks. We want the Work Orders to be generated every week, so we will keep that on 1. And we want the Work Orders to be generated on Wednesdays. When you're finished here click ok, and that's it for setting up the frequencies.

If you're using other frequency types, you can also click here on "corrective maintenance" to mark all the Work Orders generated from this Work Order Plan as Corrective Maintenance. But that doesn't work with Calendar.

Bellow the frequencies, you can select the Resources and Items that will be added to every generated Work Order. But you probably don't know which resource is going to do this cleaning job every week. So you can choose only work type code - in this case, Cleaning - and then based on Resource Allocation, the system is going to choose which worker should be assigned to the specific Work Order that's being generated.

You can read more about resource allocation on our help page help.dynaway.com, go to Work Orders/ Availability and Planning, and set up Resource Allocation.

Then you can also choose Items, which will be added to each of the Work Orders. You are not able to track the serial number or the lot number from here, because you don't know which specific item is going to be used on the Work Order. But you are going to be able to do that on each individual Work Order. But what you need to do here you need to insert the estimated number of hours that you think the worker is going to work and the estimated quantity of Items that are going to be used on the Work Order.

When all this is finished, you can click on release and release the Work Order Plan. Now the Work Orders can be either released automatically or after a review from the maintenance manager. To release Work Orders click on Work Orders, and Planning Worksheet, click on "Calculate Plan" and ok. And when we scroll here to the bottom, we can see the newly calculated Work Order Plan called "Weekly Cleaning."

When we scroll to the right, we can see the Original Planned Date, which is the date calculated by the system based on the frequency - so that's calculated for the 3rd of February 2021 (which is a Wednesday). And next to it we can also choose a planned date so if we want to actually execute the Work Order on a Thursday instead of a Wednesday, we can choose that here.
Then choose the accept action messages for the Work Order Plans from which you want to create Work Orders, and click Carry Out Action Messages.

Now the Work Order is created, and we can go back to Work Orders/Work Orders scroll to the bottom, and open the Work Order that we just created. At the bottom of the Work Order, you will be able to see that the Resources and Items have been added here from the Work Order Plan.

And there has also been a specific worker assigned to the Work Order based on Resource Allocation.

Another more visual way to schedule Work Orders is with our scheduling board. When you install the scheduling board into your EAM for BC, you'll be able to take unassigned Work Orders and assign them to your workers. You will also see Work Orders color-coded based on Work Order Type and you'll be able to edit Work Orders directly on the board. The scheduling board needs to be downloaded separately from AppSource. So now you know how Assets look how to plan future Work Orders with Work Order Plans and how to work with Work Orders as a technician.

So how do you get an overview of all of this data?

When a technician completes his work, he posts a Work Order. This way, the number of used Items and hours spent on the task are posted and the Work Order becomes a Posted Work Order. Then the data becomes available to the maintenance manager and other departments in the company through the BC platform. But just looking at Posted Work Orders is not the most efficient way to get an overview of your maintenance.

So in this part, I'd like to show you how you can effectively get an overview about what's happening in your maintenance organization. To view Posted Work Orders, go to Work Orders and Posted Work Orders. Here you can open Work Orders that have been closed and view the posted Resources Items and Expenses.

You can also go to Work Orders and Work Order Ledger Entries - to view posted Items Resources and expenses from Work Orders in one place. You can also view ledger entries on individual Assets. This way, you will get very close to the actual maintenance cost of individual Assets. Apart from the ledger entries, you can also open the maintenance log, where you will be able to track changes on Assets. Here you can see what changes were made on the Asset, the new and old values when they were made, and who made them.

To get a good overview of the whole maintenance organization go to the role center of the Asset Manager. From the top of the screen, you can navigate to different parts of the EAM.

On the right side, you can access some of the most frequently performed actions and edit the Assets Work Orders and Request setup. Below you can get an overview of the state of your Work Orders and Work Order Plans.

For all those and the statistics below you can set up queues. As you can see now, the number of overview Assets is red - because I set it up to unfavorable when it reaches over 5 overdue Work Orders. Below the Work Order statistics, you can see similar statistics about Assets. You can always click on any of those to view them as a list. Below the Asset statistics, you might be able to view the maintenance request statistics -if you decided to install our Request Module into your EAM. Below those, you can see the Work Orders assigned to me, and Assets and Items which you chose as favorite.

You can also view some of the charts that are included in the EAM. These include Assets per Condition, Assets with Image, Assets per Status, and - if you have installed the Maintenance Request Module - maintenance request duration per type. From these, you can also navigate to lists.

Now you should be able to use all the basic functionality of the EAM. If you ever feel stuck, always feel free to come back to this video and re-watch it or visit our documentation at help.dynaway.com. There you can read about everything that I've been talking about in written form with screenshots.

You can read about how to set up the system and about additional features that I didn't have time to cover in this video.

For example: How to set up condition-based maintenance, with Counters and Measurements, you can read about Failure Reporting and Downtime about the Scheduling board and the Maintenance Request module which needs to be separately downloaded from AppSource and about our integration with Business Central -for example about inventory, purchasing, our documents and our integration with Azure Blob Storage and about Dimensions.

If you have any questions, you need help with the system or if you would like to see any of those features which I couldn't cover in this video in an additional live demo please send us an email to help@dynaway.com.