**Customer-Led Trial** 

**User Guide** 

## **Enterprise Asset Management**

for

Microsoft Dynamics® 365 for Finance and Operations, Enterprise Edition

Software Release: EAM 1707.0 Document version: 18-04-000



All rights reserved. No parts of this work may be reproduced in any form or by any means - graphic, electronic, or mechanical, including photocopying, recording, taping, or information storage and retrieval systems - without the written permission of the publisher.

Products that are referred to in this document may be either trademarks and/or registered trademarks of the respective owners. The publisher and the author make no claim to these trademarks.

While every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document, or from the use of programs and source code that may accompany it.

In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

Published: April 2018.

## **Table of Contents**

© 2018 Dynaway A/S

1.	Introduction	4
2.	Maintenance Supervisor	5
2.1	1 Explore Object View	6
2.2	2 Explore Object	8
2.3	3 Explore Request	14
2.4	4 Explore Work Order	15
3.	What's Next	19
Ind	ex	0

### 1 Introduction

Enterprise Asset Management is an advanced module for managing assets and maintenance jobs in Microsoft Dynamics® 365 for Finance and Operations. Enterprise Asset Management (EAM) is developed by Dynaway A/S and integrates seamlessly with several modules in Microsoft Dynamics® 365 for Finance and Operations.

The free trial for the Dynaway Enterprise Asset Management (EAM) solution is a presentation of some of the main features in Enterprise Asset Management for Dynamics 365 for Finance and Operations. Below you find an overview and a short explanation of the basic elements of the EAM solution. Chapter 2 describes the current scenario for the free trial and includes procedures for a guided tour in our application, showing you various types of data that can be created and processed in Enterprise Asset Management.

### **Enterprise Asset Management Overview**

Enterprise Asset Management allows you to efficiently manage and carry out all tasks related to managing and servicing many types of equipment in your production department, for example, machinery for production, conveyor belts, packaging equipment, and vehicles. Enterprise Asset Management supports solutions across numerous industries. The figure below shows an overview of the key features covered by Enterprise Asset Management.



Figure 1

## 2 Maintenance Supervisor

In this free trial, we provide you with the role of maintenance supervisor. Often, the maintenance supervisor has many years of experience in the production industry, and he or she has previous experience in working as a production worker or a maintenance worker. The main tasks for the maintenance supervisor include keeping an overview of the production equipment in the plant and prioritizing maintenance tasks to ensure stability and reduce downtime on all work stations.

In this trial, we will guide you through some essential parts of the Dynaway Enterprise Asset Management solution in Dynamics 365 for Finance and Operations:

- 1. Explore object view and get an overview of objects and functional locations
- 2. Explore object details
- 3. Explore request details
- 4. Explore work order details

#### Note

The starting point of the four guides is the Dynamics 365 for Finance and Operations dashboard. In the screenshots below, the menu button and the link for the EAM menu are shown.



Figure 2

### © 2018 Dynaway A/S

dunaway



## 2.1 Explore Object View

Functional locations are used to manage objects on locations, including track object costs on functional locations. Functional locations are structured hierarchically, and locations can have sub locations. The functional location structure is static; locations cannot change place. Objects can be installed on functional locations and, if required, the objects can later be installed on another functional location.

Object costs always follow the location of the object meaning that if you install an object on a new functional location, the object automatically use the financial dimensions related to the functional location. Therefore, object costs are always related to the functional location to which the object was related at any given time. This automatic handling of financial dimensions ensures complete tracking of costs when your company performs project controlling and reporting on functional locations.

In **Object view**, you can see an overview of active objects and functional locations in a tree view. You can easily get an overview of object relations to functional locations as well as see detailed information regarding functional location, object, and related BOM, as well as a quick overview of active requests and work orders related to an object.

- On the left-hand side of the screen, click the menu button > Enterprise asset management > Common > Objects > Object view.
- 2. Expand the main functional location DPP: Dynaway Performance Plastics.
- 3. Expand DPP-02: Extrusion Lines > DPP-02-02: Extrusion Line 2.
- 4. Select object EX-201: EX-201 Extruder Line 2.
- 5. When you have finished exploring the object view, click **Finance and Operations** at the top of the screen to return to the Dynamics 365 for Finance and Operations dashboard.

	Dynamics 365 🗸	Finance and O	perations	Enterprise	assetn 🔉 Corr 🖒 C	Ob >	Object view	USPI	Q	۵	٢	<u>نې</u>		Y.
≡	🖉 Edit 🛛 View 🗸 🛛 Open	Active requests	Active work order	rs Expand	Expand all OPTIO	NS	Q				٥	0	С С	×
	Click the edit button to mak	ke changes.												×
7	Object view DPP / DPP-(	02 / DPP-02-	02 > EX-2	01										
	<ul> <li>DPP: Dynaway Pe</li> <li>DPP-01: Raw M</li> <li>DPP-02: Extrusion</li> </ul>	erformance Plastics laterials on Lines			Functional locatio	on	^	Active	work or	ders				
	DPP-02-01: Ex	trusion Line 1			DPP-02-02					1				
	◢ DPP-02-02: Ex	ctrusion Line 2			Name			Childre	en					
	▲ EX-201: EX-2	201 Extruder Line 2			Extrusion Line 2					2				
	BLN-201: E	3LN-201 Blender for Line	2		Functional location typ	e		Object	ts					
	DCD-201: I	DCD-201 DC Drive for EX	-201		Area					1				
	DCM-201:	DCM-201 DC Motor for	EX-201		Active requests									
	GB-201: GE	B-201 Gearbox for EX-20	1		3									
	MD-201: N	ID-201 Metal Detector f	or EX-201											
	DPP-02-02-0	02: Vapor and Dust Filtra	tion Line 2		Object 🔨									
	DPP-02-02-0	03: Hoppers for Extrusion	Line 2		Object			Serial I	number					
	DPP-02-03: EX	trusion Line 3			EX-201									
	DPP-04: Oulities	5			Name			Active	requests					
	DPP-06: Safety	Showers			EX-201 Extruder Lin	ne 2				1				
	DPP-07: Equipm	nent Warehouse			Object type			Active	work or	ders				
					Extruder					1				
					Product			Childre	en	-				
										5				
					Model			Items						-



#### Notes on object view:

- In the figure above, you see additional information related to the selected object. For example, you can see that the object has five child objects, and active requests and work orders are related to the object.
- Three objects (parent object and two child objects are highlighted). This
  means that active requests and/or active work orders are related to the
  objects.

- You can select the Active requests button or the Active work orders button to see the requests or work orders related to the selected object.
- Click on the child objects to see related object data for them.
- The default view in the figure above is functional locations. You can change the starting point of the object view by clicking View and making another selection, for example, "Object types" or "Objects".

### 2.2 Explore Object

An object is any type of equipment, for example a machine or machine part, which requires maintenance, service, or repair. In this section, you will see some of the data related to an object.

- On the left-hand side of the screen, click the menu button > Enterprise asset management > Common > Objects > Active Objects. The Active Objects list contains a list of currently active objects.
- 2. Select the line (not a link) for object "GEN-001 Emergency Generator".
- 3. Select the → icon on the right-hand side of the screen to open FactBoxes related to the object (**Note** that the FactBoxes section may already be visible). Click on the arrow next to a FactBox title to expand or close it.

	D	ynamics 365 🗸	Finance and Operations	Enterprise as	sset managen	ment > Common >	Objects > Active object	ts	USPI	¢ ھ	٢	© ?	1
			CT GENERAL OPTIONS 🔎									P 0 =	
	OBJI Spec Imag	ECT DETAILS cifications Parent objects ge Functional loca	RELATED INFORMATION Condition assessment Hour oc tions Faults Object Cost control Job typ	introl Criticalities CPIs Spare parts 25	REPORTS Object cor Object fau	nsumption lit							~
		Click the edit button to make	e changes.										×
V		ACTIVE OBJECTS											Ð
		✓ Object ↑	Name	Parent	Children C	Object type	Product	Model		Object tree			~
		FL-04 FL-05	FL-04 Hyster H60XT Forklift FL-05 Hyster H135FT Forklift		F	Forklift Forklift	Hyster Hyster	H60XT H135FT		GEN-001: GEI	N-001 En	iergency Gene	rator
		GB-101	GB-101 Gearbox for EX-101	EX-101	0	Searbox	Horsbaugh and Scott	140-DB					- 1
		GB-201	GB-201 Gearbox for EX-201	EX-201	G	Searbox	Horsbaugh and Scott	140-DB					- 1
		GB-301	GB-301 Gearbox for EX-301	EX-301	G	Searbox	Horsbaugh and Scott	140-DB					- 1
		GEN-001	GEN-001 Emergency Generator		c	Generator	GENERAC	QT08054GNAX					- 1
		GEN-002	GEN-002 Emergency Generator		G	Senerator	GENERAC	QT08054GNAX		_			- 1
		H-101A	H-101A Nylon Feed Hopper for EX		F	Hopper	NOVATEC	NVTC-2X4C1-6D					-1
		H-101B	H-101B Additive Hopper for EX-101		F	Hopper	NOVATEC	NVTC-2X4C1-6D		Active reque	ests		^
		H-101C	H-101C Glass Hopper for EX-101		F	Hopper	NOVATEC	NVTC-2X4C1-6D		Request 1		Request type	
		H-201A	H-201A Nylon Feed Hopper for EX		H	Hopper	NOVATEC	NVTC-2X4C1-6D		WR-000013		Corrective	
		H-201B	H-201B Additive Hopper for EX-201		H	Hopper	NOVATEC	NVTC-2X4C1-6D		WR-000014		Corrective	- 1
		H-201C	H-201C Glass Hopper for EX-201		H	Hopper	NOVATEC	NVTC-2X4C1-6D		WR-000015		Corrective	- 1
		H-301A	H-301A Nylon Feed Hopper for EX		E.	Hopper	NOVATEC	NVTC-2X4C1-6D					- 1
		H-301B	H-301B Additive Hopper for EX-201		F	Hopper	NOVATEC	NVTC-2X4C1-6D					- 1
		H-301C	H-301C Glass Hopper for EX-301		H	Hopper	NOVATEC	NVTC-2X4C1-6D			_		
		MD-101	MD-101 Metal Detector for EX-101	EX-101	N	Vletal Detector	Sesotec	PROTECTOR			_		loro
		MD-201	MD-201 Metal Detector for EX-201	EX-201	N	Metal Detector	Sesotec	PROTECTOR					NOTE
		MD-301	MD-301 Metal Detector for EX-301	EX-301	N	Vetal Detector	Sesotec	PROTECTOR		Active work	orders		~
		METER-H2O	METER-H2O Incoming City Water		N	Meter-H2O				Made order		Start data	
		METER-NG	METER-NG Incoming Natural Gas		N	Meter-NG				WO 000001		10/25/201	-
		PSV-001	PSV-001 Pressure Relief Valve		R	Relief Device-PSV	Farris	26DB10-80		WO-000009		10/31/201	, 7

#### Figure 5

4. Next, click on the link in the **Object** column for object "GEN-001" to open the object details view and see more object details.

© 2018 Dynaway A/S

	Dynamics 365 🗸 Finance an	nd Operations	Enterprise asset manager > Comm > Objec	Active objects USPI 🔎 戻	٢	⊗ ?	1
=	Cedit Delete OBJECT GENERAL	OPTIONS ,			٥	🕑 Ö 🛛	
	OBJECT DETAILS RELATED Specifications Parent objects Condition Image Functional locations Faults Cost cont	INFORMATION n assessment Hour control Object KPIs trol Job types	REPORTS Criticalities Object consumption Spare parts Object fault				^
	Click the edit button to make changes.						×
⊽ =	active objects GEN-001: GEN-001 Err	nergency Gene	erator				•
	General DENTIFICATION Object GEN-001 Name GEN-001 Emergency Generator Object type Generator	Children Functional location DPP-04-03 PARENT OBJECT Parent Name	PRODUCT Product GENERAC Model QT08054GNAX Model year Serial number	STAGE Current stage Active Ves WORK ORDER Priority 2 Criticality	GEN-	001 🔨	
	Asset					•	I
	Details					~	
	Notes					~	
	Specifications					~	

Figure 6

### Note

You can create objects and related sub-objects in a hierarchical tree structure to display relations and dependencies of objects. Maintenance jobs can be related to all levels of the tree structure. Also, statistics can be created for the individual level, or as a sum of all sub-object levels.

### **Object Specifications**

Object specifications are used to describe properties related to an object type or object. You can set up all kinds of object-related specifications. For example, for a machine you can create specifications regarding engine volume, power consumption, oil capacity, and maximum load capacity under different conditions.

• In the object details view, click **General** tab, **Specifications** to see the object specifications related to the object. Click the back button (<) at the top of the screen to return to the object details view.

© 2018 Dynaway A/S

	Dynamics 365 🗸	Finance and Operations	Enterprise > C > ( >	Active objects	USPI ,D	₽ ©	<b>@</b> ?	1
≡		elete OPTIONS 🔎				٥	0 <b>9</b>	с х
	Click the edit button to ma	ke changes.						×
7	GEN-001 : GEN-001 EMERG Object spec	sency generator ifications						
		Search Type to search	]					
	Object	Specification type	Description	Value	Data type	Unit	t	
	GEN-001	Coupling Type	Coupling Type	Flexible Disc	String			
	GEN-001	Energy	Energy Rating	80 kWH	String	kW	'n	
	GEN-001	Engine Make	Engine Make	GENERAC	String			
	GEN-001	Engine Model	Engine Model	V-8	String			
	GEN-001	Frequency	Frequency Rating	60.00	Real	Hz		
	GEN-001	Fuel Type	Fuel Type	Natural Gas	String			
	GEN-001	Output Phase	Output Phase	3	Integer			
	GEN-001	Alternator Output Leads	Alternator Output Leads	6 Wire	String			

Figure 7

### **Object Image**

In the object details view, click General tab > Image to see an image or photo
of the object. Click the back button (<) at the top of the screen to return to
the object details view.</li>



Figure 8

### **Object Documents**

You can set up documents to automatically relate to, for example, job types, products, object types, or objects. This is useful when updated document versions are released. In that case, you only need to place the updated document on the standard location you use for your Dynamics 365 for Finance and Operations documents, attach the document to the object document record you have created, and the updated document can be accessed from the **All objects**, **Active objects**, **My active objects**, **All work orders**, and **Active work order lines** menu items. The process regarding attaching documents to an object document record uses the standard document handling system in Dynamics 365 for Finance and Operations.

<u>Example:</u> A document may relate to an object type - product - model combination (set up in the second record in the **Object documents** screenshot below). The related document could be the standard manual for the selected product model.



 In the object details view, click Object tab > Object documents to see the files related to the object. Click the back button (<) at the top of the screen to return to the object details view.

Figure 9

### **Object Calendar**

The object calendar contains a list of all the expected preventive maintenance sequences, requests, and rounds to be carried out. Some calendar entries may have been converted to work orders.

• In the object details view, click **Object** tab > **Object calendar** to see the

object calendar entries related to the object. Click the back button ( ) at the top of the screen to return to the object details view.

• When you have finished exploring the object details, click **Finance and Operations** at the top of the screen to return to the Dynamics 365 for Finance and Operations dashboard.

### Note

In this example, the object calendar entries are generated from maintenance sequences to which the object is related.

When a calendar entry has been related to a work order, the work order ID will be displayed in the **Work order** field.

	Dyr	namics	365 🗸	Finance a	nd Operatior	ns f	interprise asse	t management >	Common >	Objects > All object	ts		USPI				٢		0
≡			elete OBJ	ECT CALENDAR	OPTIONS												<b>P</b> 0		
	MAIN	AIN	RELATED	NFORMATION															
	Work	order pool	Job type	setup															
																			~
	0	PEN OBJEC	CALENDAR L	INES :: GEN-001 : GI	N-001 EMERGENCY	GENERATOR													
Y	2	ନ୍ଦ Filter																	•
		<ul> <li>Expect</li> </ul>	ed start 1		Object	Job type	Variant	Trade	Forecast hours	Functional location	Reference type	Reference ID	Description				Prior	ity	
		✓ 11/7/	2017 08:00:0	0 AM	GEN-001	PM	Weekly	Electrician	2.00	DPP-04-03	Maintenance sequences	GEN-PM	Emergency G	enerato	Weekly	PM	3		
		11/13	/2017 08:00	00 AM	GEN-001	PM	Yearly	Electrician	2.00	DPP-04-03	Maintenance sequences	GEN-PM	Emergency G	enerator	Yearly I	PM	3		
		11/14	/2017 08:00	00 AM	GEN-001	PM	Weekly	Electrician	2.00	DPP-04-03	Maintenance sequences	GEN-PM	Emergency G	enerator	Weekly	PM	3	1	
		11/21	/2017 08:00	00 AM	GEN-001	PM	Weekly	Electrician	2.00	DPP-04-03	Maintenance sequences	GEN-PM	Emergency G	enerator	Weekly	PM	3		
		11/28	/2017 08:00	00 AM	GEN-001	PM	Weekly	Electrician	2.00	DPP-04-03	Maintenance sequences	GEN-PM	Emergency G	enerator	Weekly	PM	3		
		12/5/	2017 08:00:0	0 AM	GEN-001	PM	Weekly	Electrician	2.00	DPP-04-03	Maintenance sequences	GEN-PM	Emergency G	enerator	Weekly	PM	3		
		12/12	/2017 08:00	00 AM	GEN-001	PM	Weekly	Electrician	2.00	DPP-04-03	Maintenance sequences	GEN-PM	Emergency G	enerato	Weekly	PM	3		
		12/19	/2017 08:00	00 AM	GEN-001	PM	Weekly	Electrician	2.00	DPP-04-03	Maintenance sequences	GEN-PM	Emergency G	enerator	Weekly	PM	3		
		12/26	/2017 08:00	00 AM	GEN-001	PM	Weekly	Electrician	2.00	DPP-04-03	Maintenance sequences	GEN-PM	Emergency G	enerator	Weekly	PM	3		

### Figure 10

A maintenance sequence defines when a pre-planned preventive maintenance job is to be carried out on an object. Maintenance sequences can be related to objects, object types, functional locations, or functional location types. A maintenance sequence can have multiple maintenance sequence lines. Job type and interval are specified on the maintenance sequence line. There are two types of maintenance sequence lines:

- Time
- Counter

Maintenance sequence lines of type "Time" (shown in the screenshot below) are used for recurring planned maintenance based on a fixed time interval. Maintenance sequence lines of type "Counter" are used for planned maintenance or reactive maintenance based on object counter registrations. A maintenance sequence may include several maintenance sequence lines of both types.

© 2018 Dynaway A/S

	Dynamics 365 🗸	Finance and	Operations	Enterprise a	isset management	Setup >	Preventive main	ntenance 🗲 Ma	intenance seque	ences		USPI	پ م	٢	۲		
≡															0		
	Click the edit button to make	e changes.															×
			Maintena	ince sequ	ences												
÷	EX-PM Extruder Line PM		IDENTIFICATION Maintenance sequer	nce	PLANNING Plan date		DETAILS Lines	Objects	2								
	GEN-PM Emergency Generator PM		Name Emergency Gene	erator PM	Active Yes			2 Functional	locations								
			Lines + Add line	🗊 Remove												^	
				ine Description	apparator Vearly PM	Line type	Job type	Provontivo	Variant	Trade	End days	End hou	Popparte	ype od from n	lan date	.	
			✓ :	2.0 Emergency G	enerator Weekly PM	Time	PM	Preventive	Weekly	Electrician			Repeate	ed from p	lan date		
			_														
			Objects + Add line	Remove												^	
			✓ Object ↑		Start date												
			GEN-00	1	10/24/2017												
			GEN-00	2	10/24/2017												

Figure 11

### 2.3 Explore Request

Requests are notes or declarations that can be created to make a manager or planner aware that an object may require a maintenance or repair job - without actually creating a work order. A work order may subsequently be created based on a request if the contents of the request are considered to be valid for a work order to be created. Requests can be created for any object in Enterprise Asset Management. Various request types can be created, depending on how your company uses requests. Here are some examples:

- Maintenance requests
- Notes
- Corrections / Enhancements
- Investments
- Depot repair for the purpose of managing repair of objects that you receive from another location to carry out a maintenance or repair job, and then return the object after the job is completed.
- On the left-hand side of the screen, click the menu button > Enterprise asset management > Common > Requests > Active Requests. The Active Requests list contains a list of currently active requests.

	Dynar	nics 36	55 ~	Finance and	d Operations	Enterprise asset management > Common >	Requests >	Active requests	USPI	Q	Ð	٢	۲			t
=	🖉 Edit	🗊 Dele	te REQUES	OPTIONS	Q							٥	60	U	ď	×
	MAINTAIN Work orde	r pool	VIEW Object fault Work orders	STAGE Stage log	REPORTS Request details											~
	Click t	ne edit but	ton to make ch	anges.												×
7	ACTIV	E REQUES	TS												_	
	~	Request	î	Request type	e D	escription		Priority		Functional	location		Objec	:t		
		WR-000	001	Corrective	F	orklift is leaking hydraulic fluid from lifting cylinder		2		DPP-05			FL-01	1		
		WR-000	002	Corrective	W	/aterbath 001 has broken wheel caster		3		DPP-02-0	03-01-01		WB-0	001		
		WR-000	003	Corrective	C	lassifier on Line 1 is not oscillating		2		DPP-02-0	01-01		CL-1	01		
		WR-000	004	Corrective	N	letal Detector for Line 2 has a fault light showing		3		DPP-02-0	02		MD-	201		
		WR-000	005	Corrective	s	afety Shower 004 is leaking water from the shower head		2		DPP-06			SS-0	04		
		WR-000	006	Corrective	G	enerator 002 has a birds nest coming out of the engine o	ove	2		DPP-04-0	03		GEN	-002		
		WR-000	007	Corrective	Li	ne 3 Extruder Gearbox is leaking oil		2		DPP-02-0	03		GB-3	01		
		WR-000	009	Corrective	F	orklift 05 has a burned out light		3		DPP-05			FL-05	5		
		WR-000	011	Safety	U	ine 2 Extruder has a barrel guard coming loose		1		DPP-02-0	02		EX-2	01		
		WR-000	012	Breakdowr	n B	lender for Line 2 is not feeding material		2		DPP-02-0	02		BLN-	201		
		WR-000	013	Corrective	G	enerator 001 has fluid leaking from underneath it		2		DPP-04-0	03		GEN	-001		
		WR-000	014	Corrective	G	enerator 001 has a broken instrument panel cover		2		DPP-04-0	)3		GEN	-001		
	~	WR-000	015	Corrective	v	/ant to try a new Natural Gas Type fitting on Generator 00	)1	2		DPP-04-0	03		GEN	-001		

Figure 12

- 2. In the **Request** column, click on the link for request "WR-000015" to open the request details view.
- Click on the **Notes** FastTab to see notes added to the request (this FastTab may already be visible).

## **,**

dunawa

© 2018 Dynaway A/S

	Dynamics 365 🗸 🛛 Finance ar	nd Operations	Enterprise asset man	; > Comr > Requi > Active re	equests USPI 🔎	) 🖻 (	3	۵	?	T
≡	C Edit 🗊 Delete REQUEST OPTION	s p				1	0 (	0	ď	×
	MAINTAIN VIEW STAGE Work order pool Object fault Stage log Work orders	REPORTS Request details								
	Click the edit button to make changes.									X
₹ -	ACTIVE REQUESTS WR-000015: Want to 1	try a new Na	atural Gas Type	e fitting on Generat	tor 001					
=	General					V	VR-0000	15 🔨		
	IDENTIFICATION	LOCATION		STARTED	DETAILS				11	
	Request WR-000015	Longitude 0.00	0000000	Started by	Number of fault	s			1	
	REQUEST	Latitude 0.00	0000000	Actual start 10/31/2017 03:36:09 PM	Work order pool	ls			1	
	Request type Corrective			Actual end						
	Description	RESPONSIBLE Responsible group			STAGE				11	
	Want to try a new Natural Gas T	Responsible group			New					
	Priority 2	Responsible			Active Yes	•			1	
	4								1	
	Notes Sourcing would like to switch vendor	s for valves and fitting	s. We would like to try a n	ew type of Natural Gas fitting for the	e Gas Inlet.			^		

Figure 13

- 4. On the **Request** tab, click **Object fault** to see related fault registrations. Click the back button (<) at the top of the screen to return to the request details view.
- 5. When you have finished exploring the request details, click **Finance and Operations** at the top of the screen to return to the Dynamics 365 for Finance and Operations dashboard.

## 2.4 Explore Work Order

The central parts of Enterprise Asset Management are objects and work orders. An object is a machine or machine part that requires continuous maintenance and service. Objects can be created in a hierarchical structure, and they can be related to functional locations. Work orders (maintenance jobs) can be planned at all levels in the object hierarchy.

Work orders are used to manage, provide required information for, and register consumption on service jobs. A work order may contain one or more work order lines. One or more objects can be connected to a work order. Each work order line defines a maintenance job scheduled on the object.

Work orders can be created automatically or manually:

- · Automatically using the Schedule maintenance sequences functionality
- · Automatically using the Schedule rounds functionality

dunau

- Create from object calendar, which can be preventive maintenance jobs or requests
- Create a work order manually
- Create a work order from All requests or Active requests or My functional location requests views

A work order contains a work order type, for example, preventive maintenance, corrective maintenance, or inspection. The work order contains one or more work order lines. Each work order line defines a job to be carried out on an object and a related job type, for example, 10,000 km, 50,000 km, 1-year overhaul, or safety inspection. One work order can relate to several objects.

Work orders can be created in various ways relating to corrective, preventive, or reactive maintenance. It is also possible to create work orders manually. In this example, you will look at a work order that has been automatically created from a preventive maintenance setup.

- On the left-hand side of the screen, click the menu button > Enterprise asset management > Common > Work orders > Active Work orders. The Active Work orders list contains a list of currently active work orders.
- 2. Select the line (not a link) for work order "WO-000009 Emergency Generator Weekly PM".
- 3. Select the 🖃 icon on the right-hand side of the screen to open FactBoxes related to the work order (**Note** that the FactBoxes section may already be visible). Click on the arrow next to a FactBox title to expand or close it.

	Dy	namics 365 🗸	Finance an	d Operations	Enterprise asset manag	ement 🕻 C	ommon 💙 Work order	rs 🕻 Active work	orders USP	Q	€ I	٢	۲		T
		lit 📋 Delete 🛛 Wo	ORK ORDER GEN	ieral options 🔎								٥	6 O		
	VIEW Timel	SHOW Header view Line view	LINES OF Notes Ot Tools Pr Checklist	UECT	PROJECT ssessment Forecast iters Journals	STAGE Stage log	ATTACHMENTS Object documents								~
	C	lick the edit button to ma	ike changes.												×
7	A	CTIVE WORK ORDERS													E
		✓ Work order ↑	Work order type	Description			Lines Priority	Criticality	Start date/time		Current st	age	Active	7	
		WO-000001	Corrective	Replace oil pressure ga	auge. The glass cover is c	racked.	1 2		10/25/2017 01:44:44 AM		New		$\checkmark$		
		WO-000002	Corrective	Silo 002 has a stress cr	rack on the first safety ste	ps	1 2		10/25/2017 01:56:35 AM		New		$\checkmark$		
		WO-000003	Corrective	Air Knife 201 has an air	ir leak on the air inlet fitti	ng	1 2		10/25/2017 01:57:56 AM		New		~		
		WO-000004	Corrective	Repair coupling cover.	. It has a dent in it that co	uld in	1 2		10/25/2017 02:00:47 AM		New		~		
		WO-000005	Corrective	Weld small stress crack	k on Waterbath 006		1 2		10/25/2017 02:03:16 AM		New		$\checkmark$		
		WO-000006	Corrective	Replace Knives on Pelle	letizer for Line 2		1 2		10/25/2017 02:05:48 AM		New		~		
		WO-00008	Preventive	Extruder Line Weekly P	PM		1 3		11/2/2017 07:00:00 AM		New		$\checkmark$		
		WO-000009	Preventive	Emergency Generator	Weekly PM		1 3		10/31/2017 07:00:00 AM		New		~		

Figure 14

4. Next, click on the link in the **Work order** column for work order "WO-000009" to open the work order details view.

© 2018 Dynaway A/S

	nics 365 🗸	Finance	e and Operati	ons Enter	orise asset mana	gement > Co	ommon > Work ord	ers > Active work o	orders	USPI	© چ ۹	)	
edit	Delete WO	RK ORDER	GENERAL OPTI	ons 🔎							٥	60	Ö
IEW imeline	SHOW Header view Line view	LINES Notes Tools Checklist	OBJECT Object fault Production stop	Condition assessmen Object counters	PROJECT t Forecast Journals	STAGE Stage log	ATTACHMENTS Object documents						
Click th	e edit button to mak	ke changes.											
ACTIVE	work orders ork order:	WO-00	00009					Li	nes Header	Work order type Preventive	Current stage New		
Wo	rk order head	er											~
Wo	rk order lines												1
+	- Add line 🏾 🗐 Ri	emove Ob	ject counters (	Object documents									
~	/ Line numb	er Object	Fu	nctional location	Job type		Variant	Trade	Link	Sch	eduled start		
		1 GEN-001	DF	PP-04-03	PM		Weekly	Electrician	None				
Line	e details eral Descripti	1 GEN-001	Df	PP-04-03	PM		Weekly	Electrician	None		In	n process	^
Line	e details eral Descripti JECT	1 GEN-001	Df ule Address Variant	77-04-03	PM	Scheduled end	Weekly	Electrician	None	LOCATION	In	n process	^
Line Gene OBJ Obj	e details eral Descripti JECT	on Sched	Df ule Address Variant Weekly	r r	PM	Scheduled end	Weekly	Electrician Project stage In process	None	LOCATION Longitude	In	n process	^
Line Gene OBJ Obj Gl	e details eral Descripti JECT ject EN-001	on Sched	Df ule Address Variant Weekly Trade	7	PM	Scheduled end	Weekly	Project stage In process Activity number	None	LOCATION Longitude	0.000000000	n process	^
Line Gene OBJ GI Nar	e details eral Descripti ject EN-001 me	on Sched	DF ule Address Variant Weekly Trade Electric	r ian	PM :	icheduled end	Weekly	Project stage In process Activity number USPI-00043	None	LOCATION Longitude Latitude	In 0.000000000	1 process	^
Line Gene OBJ Obj Gl Nar Gl	e details eral Descripti rect EN-001 EN-001 Emergen	on Sched	DF ule Address Variant Weeky Trade Electric	r r	PM	icheduled end	Weekly	Project stage In process Activity number USPI-00043	None	LOCATION Longitude Latitude	In 0.000000000	n process	^
Line Gene OBJ GI Nar Gf	e details eral Descripti rect EN-001 EN-001 EN-001 Energent	on Sched	DF ule Address Variant Weeky Trade Electric SCHEDUL Link	rp-04-03	PM	Scheduled end Scheduled end Scheduled PROJECT Vroject ID	Weekly	Project stage In process Activity number USPI-00043 CUSTOMER Customer account	None	LOCATION Longitude Latitude	in 0.0000000000 0.000000000	n process	^
Line Gene OBJ Gl Nar Gt Job	e details eral Descripti recr EN-001 EN-001 Emergene s type	on Sched	DF ule Address Variant Weeky Trade Electric Link None	<ul> <li>,</li> <li>,</li></ul>	PM :	icheduled end icheduled PROJECT Vroject ID EAM-0008	Weekly	Project stage In process Activity number USPI-00043 CUSTOMER Customer account	None	LOCATION Longitude Latitude REFERENCE Beference by	0.000000000 0.000000000	a process	^

Figure 15

### **Checklists**

Checklists are set up on job types and used when you work on a work order. Filling out checklists and any related measurements is part of completing a work order.

In the work order details view, click Work order tab > Checklist to see the checklist and related measurements (if any) for the work order. Click the back button (<) at the top of the screen to return to the work order details view.</li>

	Dynamics 365 🗸	Finance and	d Operations Ente	rprise asset manager	ment 🗲 Common	> Work o	rders 🗲 Active wo	ork orders	USPI	چ م	© @	) 7	
≡	🖉 Edit 🛛 🕂 New 🗊 De	lete OPTIONS	Q								0	0	с x
	Click the edit button to mak	e changes.											×
	,∕P Filter		wo-000009 : EMERGENCY G Checklists	ENERATOR WEEKLY PM									
-	Work order	Line number	WORK ORDER LINE	Line number	Object								
-	WO-000009	1	Work order	1	GEN-001								
			WO-000009		Job type								
					PM								
			Checklist										~
			1.00: Inform	Operation	IS								
			Overview Notes										
			+ Add line iii Rei	nove									
			✓ Line	Name		N/A	Worker	Worker mandatory	Date checked	Date manda	tory Not	e	
			1.0	Inform Operations				~		~	~	1	
			2.0	Check Oil				~		~	~		
			3.0	Check Coolant				~		~	~		
			4.0	Check Fuel Level				~		~	~		
			5.0	Check Block Heater	r			~		~	~		
			6.0	Run Generator for	20-30 Minutes			~		~	~		
		I	7.0	Visual Inspection				~	_	~	~		
			Measurements										-

Figure 16

### **Notes**

Work order notes are divided in three categories: Description, worker's remarks, and internal notes.

- In the work order details view, click Work order tab > Notes to see the notes added to the work order. Click the back button (<) at the top of the screen to return to the work order details view.</li>
- When you have finished exploring the work order details, click **Finance and Operations** at the top of the screen to return to the Dynamics 365 for Finance and Operations dashboard.

Dynamics 365 🗸			Finance and Operations			Active work orders	USPI	Q	<b>□</b>		
≡	🖉 Edit	+ New	🗊 Delete	OPTIONS	Q		٥	60	Ü	ď	×
	Click the edit button to make changes.										×
7	, ← Filter	_			wo-000009 Work	e : emergency generator weekly pm order notes					
=	1 GEN-C	)01			Descri	otion			^		
	PM				Add	l timestamp					
	Weekl Electri	y cian			Week	ly Generator PM to be performed on all Gener	ac Generator	'S			
					Worke	rs' remarks			~		
					Interna	al note			~	·	

Figure 17

### 3 What's Next

We hope you've enjoyed the free trial, and that you have gained some insight into our Enterprise Asset Management solution. Want to learn more, or do you have questions for us regarding EAM? Please send us an email: <u>info@dynaway.com</u>.

You are also welcome to learn more on our website: https://www.dynaway.com/eam/.