



NB ASSETS MANAGEMENT – BUSINESS CENTRAL

CETAS INFORMATION TECHNOLOGY

SOLUTION USER MANUAL

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1. Purpose & Scope of Document

Solution User Guide of NB Assets management on Business Central explains the following for,

- Equipment
- Equipment Maintenance Schedule
- Equipment Breakdown Request
- Maintenance order
- Order completion

Target audience of this document are,

- Business Central Implementation Consultants
- Microsoft Dynamics Business Central Partners
- End customers

2. Solution Description

- Equipment Maintenance has its major function of production management that is concerned with day-to-day problem of keeping the physical plant in a good operating condition. And the maintenance management concerned with the planning, organizing, and directing the resources to control the availability and performance of the plant / equipment to the specific level.
- The major objective of the Equipment maintenance shall be like – *minimizing loss of productive time, minimizing the repair time & cost, minimizing the loss due to production stoppage, prolonging the life of the equipment, to keep all productive assets in a good operating condition, to maximize the efficiency and productivity.*
- There are broadly two type of equipment maintenance
 1. Preventive Maintenance
 2. Breakdown Maintenance

- Preventive Maintenance covers all Programmed maintenance which is carried out to prevent the occurrence of failure before they develop to a Breakdown or interruption in production.

Preventive Maintenance shall occur based on the condition like – *Periodicity and Utilization.*

- Breakdown Maintenance happens only when the repair or replacement of the equipment or components, because of the failure which takes place.

Breakdown Maintenance shall occur against the Maintenance Request for the equipment failure.

3. Master Records

3.1 How to create new equipment?

1. Search for Equipment

(Path: Equipment Management → Equipment's)

2. Click 'NEW'



3. Under 'General' tab provide the following details

- a. Equipment No. – System will flow equipment number automatically
- b. Name – Provide name for the equipment
- c. Type – System will automatically set the type as 'Machine'
- d. Base Unit of Measure – Provide UOM for the equipment
- e. Model No – Provide Model number for the equipment
- f. Manufacturer – Provide manufacturer details
- g. Equipment reference No. – Provide equipment reference number
- h. Resource Group No. – Provide Resource group number
- i. Global Dimension code 1 – Provide dimension value
- j. Global Dimension code 2 – Provide dimension value
- k. Blocked – Make true if equipment is no longer in use.
- l. Equipment status – System will update status automatically

4. Under 'Maintenance' tab provide the following details

- a. Activity Type – Provide activity type as follows
 - i. Duration – Select duration If the equipment maintenance is based on scheduled

- ii. Utilization – Select utilization if the equipment maintenance is based on usage
 - iii. Combination – Select combination if the equipment maintenance is based on usage and scheduled
 - b. Execution Type – Provide executive type as follows
 - i. Internal – Select internal if the maintenance is done by internal process
 - ii. External – Select external if the maintenance is done by external process
 - iii. Hybrid – Select hybrid if the maintenance is done by both internal & external
 - c. Utilization UOM – Provide Equipment usage calculation UOM
 - d. Utilization Quantity – System will automatically populate the qty based on the utilization journal
 - e. Maintenance Duration – Provide duration period for the schedule occurrence with date formula like 2D, 3W, 1M etc...
 - f. Next Maintenance Date – Provide a start date for the schedule
- 5. Under 'Fixed Asset' tab provide the following details
 - a. Fixed asset no. – Provide a fixed asset number related to the equipment
 - b. Fixed asset name – Provide a fixed asset name
 - c. Depreciation method – Provide depreciation method for the fixed asset
 - d. Date of Purchase – Provide date of purchase of the fixed asset
 - e. Purchase vendor no. – Provide purchase vendor number
 - f. Expiry date – Provide expiry date for the asset
- 6. Under 'Invoicing' tab provide the following details
 - a. Direct Unit Cost – Provide direct unit cost for the equipment

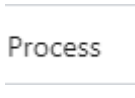
- b. Indirect cost% - Provide indirect cost%
- c. Unit cost – Provide unit cost
- d. Price calculation – Provide price calculation formula
- e. Profit% - Provide profit%
- f. Unit price – System will calculate unit price
- g. Gen. Prod. posting group – Select a general product posting group
- h. VAT Prod. Posting group – Select a VAT product posting group

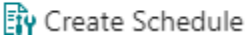
3.2 How to create schedule for the equipment?

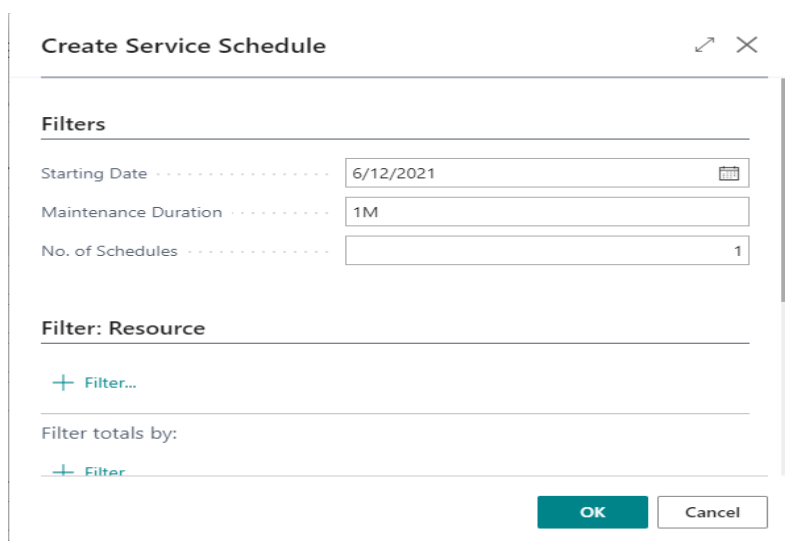
1. Search for Equipment

(Path: Equipment Management → Equipment)

2. Open an equipment card

3. Under 'Process' action 

4. Click 'Create Schedule'  to schedule creation for duration type



Create Service Schedule

Filters

Starting Date 6/12/2021

Maintenance Duration 1M

No. of Schedules 1

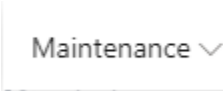
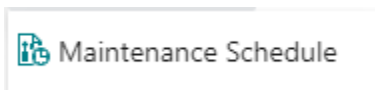
Filter: Resource

+ Filter...

Filter totals by:

+ Filter

OK Cancel

5. Starting date will flow automatically from equipment card, and it will be editable
6. Maintenance Duration will flow automatically from equipment card, and it will be editable
7. No. of Schedule – Provide a value to how much schedule need to create like 5, 10 etc...
8. Click ‘Maintenance’  and select ‘Maintenance Schedule’ 
9. Provide following in the Resource Service Setup for Utilization schedule
 - a. Equipment No. – Equipment number will flow automatically
 - b. Planned Schedule date – System will automatically flow the planned schedule date
 - c. Activity Type – Select activity type as Utilization or combination
 - d. Min. range – Provide Minimum usage for maintenance
 - e. Max. range – Provide Maximum usage for the maintenance
 - f. Unit of measure – System will flow the UOM from equipment master
 - g. Scheduled date – System will automatically flow the scheduled value once maintenance schedule created
 - h. Maintenance order – System will automatically flow the maintenance order number
 - i. Completed – System will make true the Boolean once maintenance order completed.

4. Utilization Journal

4.1 How to post the utilization journal?

1. Search 'Utilization Journal'

(Path: Equipment management → Utilization journal)

2. Provide the following details under 'Utilization Journal'
 - a. Posting date – Provide posting date for the journal
 - b. Document date – Provide document date for the journal
 - c. Entry type – System will automatically flow the type as usage
 - d. Document No. – Provide a document number for the journal
 - e. Resource No. – Provide a resource number for which resource the usage will flow
 - f. Resource Group No. – Provide a resource group number
 - g. Description – System will automatically flow the resource description
 - h. Total utilization Qty. – Provide a total usage quantity for the resource
 - i. Usage Qty – System will automatically calculate the current usage qty
 - j. Utilization UOM – System will automatically flow the UOM from equipment card


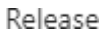

3. Click 'Post'  Post

5. Material Request

5.1 How to create Material Request

1. Search 'Material Request'

(Path: Equipment Management/ Material Request)



2. Click 'New' 
3. Under 'General' tab provide the following details
 - a. Complaint code – System will automatically flow the number for the complaint
 - b. Description – Provide a description for the complaint
 - c. Equipment no. – Select an equipment number
 - d. Equipment name – System will automatically flow the equipment name
 - e. Complaint date – Provide a complaint date
 - f. Document date – System will automatically flow the document date
 - g. Expected date – Provide a expected date for the complaint
 - h. Severity – Select a severity type for the complaint
 - i. Remarks – Provide a remark if any
 - j. Breakdown Maintenance order no. – System will automatically flow the maintenance order number
4. Click 'Release' 
5. Click 'Create Maintenance'  to create breakdown maintenance order

6. Maintenance Order

6.1 How to create maintenance order from schedule?

1. Search 'Maintenance Schedule'

(Path: Equipment management/ Maintenance schedule)

2. Click 'Get Maintenance Schedule'  Get Maintenance Schedule
3. System will fetch the schedule duration date which fall under the system date and usage fall under maintenance quantity
4. Select the schedule lines, system will allow to select a multiple line also
5. Click 'Create Maintenance'  Create Maintenance to create preventive maintenance order


Note:

- If job que is configured, then system will fetch the schedule by automatically
- In Maintenance management setup provide a value for the field notify before to get a mail notification before schedule creation
- In User setup provide email id and make true the maintenance notification to receive a mail notification.

6.2 How to post the Preventive maintenance order?





1. Search 'Preventive Maintenance Order'

(Path: Equipment management/ Preventive maintenance order)

2. System will load the maintenance order that created from the schedule
3. Click 'New'  to create a direct preventive order
4. Under 'General' tab provide the following details

- a. No. – System will automatically flow the preventive maintenance order number from number series setup
 - b. Equipment No. – Select a equipment for the maintenance
 - c. Equipment Name – System will automatically flow the equipment name
 - d. Equipment Reference No. – System will automatically flow the equipment reference number.
 - e. Severity – Select a severity for the order
 - f. Activity Type – System will automatically flow the activity type from equipment master
 - g. Execution Type – System will automatically flow the executive type from the equipment master
 - h. Location Code – System will automatically flow the location type from the equipment master.
 - i. Document Date – System will automatically flow the system date as document date
 - j. Start Date – Provide a start date for the maintenance
 - k. End Date – Provide a end date for the maintenance
 - l. Duration – System will automatically calculate the duration
 - m. Completion date – System will automatically flow the completion date once the order is closed
 - n. Global Dimension Code 1 – Select a global dimension 1 value
 - o. Global Dimension Code 2 – Select a global dimension 2 Value
5. Under ‘Lines’ tab provides the following details
- a. Type – Select the following types as follows
 - i. Item – Select an item type if material is used for the maintenance


- ii. Resource – Select a resource type if material is used for the maintenance
- iii. G/L account – Select a GL account to book the expense
- b. No. – Select an item/ Resource/ GL account number
- c. Description – System will automatically flow the description
- d. Unit of measure – System will automatically flow the UOM
- e. Quantity – Provide a quantity
- f. Unit Cost – Provide a unit cost
- g. Line Amount – System will calculate the line amount
- h. Line Discount% - Provide discount % if any
- i. Line Discount Amount – System will calculate the line discount amount
- j. Supply from – Select a vendor number from whom the material is purchasing
- k. Qty to order – Provide a quantity to order
- l. Quantity ordered – System will automatically update the field once order created
- m. Quantity Received – System will automatically update the field once quantity received against the order
- n. Outstanding Quantity – System will calculate the outstanding quantity automatically
- o. Qty. to consume – Provide a quantity to consume the material
- p. Quantity consumed – System will automatically update the field once quantity consumed
- q. Location code – System will automatically flow the location code from the header

- r. Department code – System will flow the dimension code automatically from the header
 - s. Project code – System will flow dimension code automatically from the header
6. Under 'Vendor' tab provide the following details if it's a external/hybrid execution
- a. Vendor No. – Select a vendor number
 - b. Vendor Name – System will automatically flow the vendor's name
 - c. Address – System will automatically flow the vendor address from the master
 - d. City – System will automatically flow the city
 - e. Post code – System will automatically flow the post code
 - f. Email – System will automatically flow the email
 - g. Phone No. – System will automatically flow the phone number
 - h. Currency Code - System will automatically flow the currency code
7. Click 'Release' 
8. Click 'Create Purchase Order'  Create Purchase Order
9. Click 'Post'  Post to consume
10. Click 'Close Order'  Close Order

6.3 How to post the Breakdown maintenance order?





1. Search 'Breakdown Maintenance Order'

(Path: Equipment management/ Breakdown maintenance order)

2. System will load the maintenance order that created from the Material Request
3. Click 'New'  to create a direct breakdown order
4. Under 'General' tab provide the following details
 - a. No. – System will automatically flow the breakdown maintenance order number from number series setup
 - b. Equipment No. – Select an equipment for the breakdown maintenance
 - c. Equipment Name – System will automatically flow the equipment name
 - d. Equipment Reference No. – System will automatically flow the equipment reference number.
 - e. Severity – Select a severity for the order
 - f. Activity Type – System will automatically flow the activity type from equipment master
 - g. Execution Type – System will automatically flow the executive type from the equipment master
 - h. Location Code – System will automatically flow the location type from the equipment master.
 - i. Document Date – System will automatically flow the system date as document date
 - j. Start Date – Provide a start date for the maintenance
 - k. End Date – Provide an end date for the maintenance
 - l. Duration – System will automatically calculate the duration
 - m. Completion date – System will automatically flow the completion date once the order is closed
 - n. Complaint code – System will automatically flow the complaint code if it's created from Material Request


- o. Complaint Description – System will automatically flow the complaint description
 - p. Complaint Remarks – System will automatically flow the complaint remarks from the Material Request
 - q. Global Dimension Code 1 – Select a global dimension 1 value
 - r. Global Dimension Code 2 – Select a global dimension 2 Value
5. Under 'Lines' tab provides the following details
- s. Type – Select the following types as follows
 - i. Item – Select an item type if material is used for the maintenance
 - ii. Resource – Select a resource type if material is used for the maintenance
 - iii. G/L account – Select a GL account to book the expense
 - t. No. – Select an item/ Resource/ GL account number
 - u. Description – System will automatically flow the description
 - v. Unit of measure – System will automatically flow the UOM
 - w. Quantity – Provide a quantity
 - x. Unit Cost – Provide a unit cost
 - y. Line Amount – System will calculate the line amount
 - z. Line Discount% - Provide discount % if any
 - aa. Line Discount Amount – System will calculate the line discount amount
 - bb. Supply from – Select a vendor number from whom the material is purchasing
 - cc. Qty to order – Provide a quantity to order
 - dd. Quantity ordered – System will automatically update the field once order created

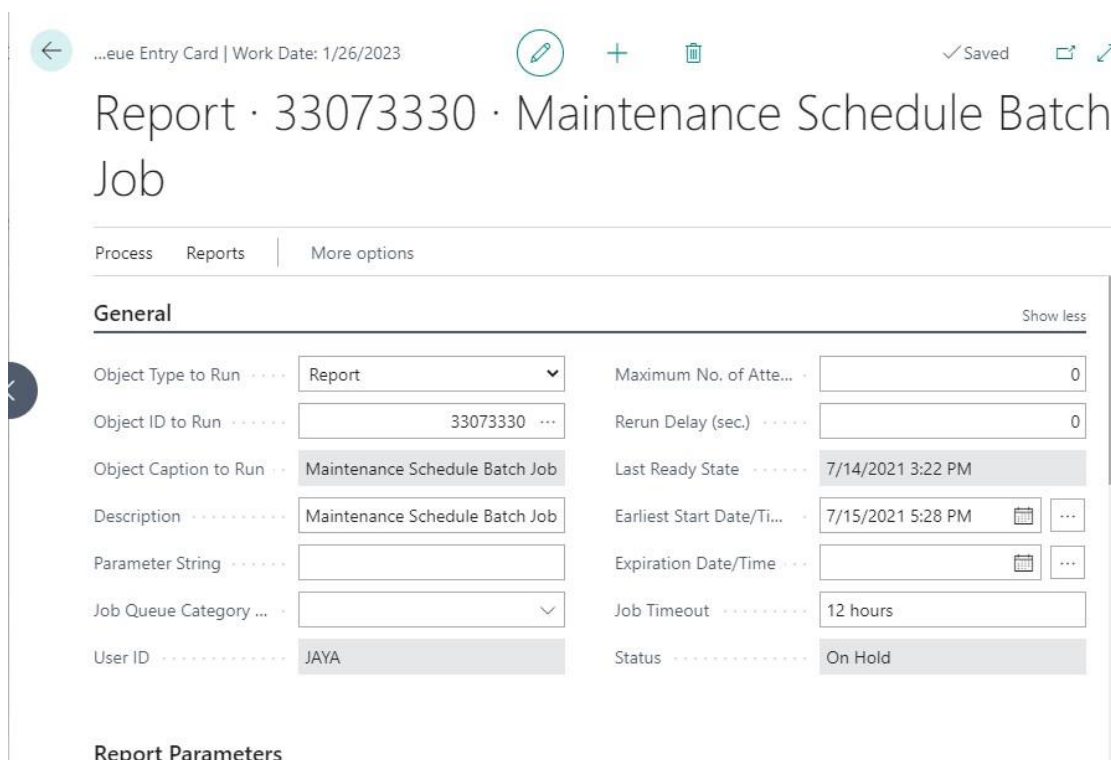
- ee. Quantity Received – System will automatically update the field once quantity received against the order
 - ff. Outstanding Quantity – System will calculate the outstanding quantity automatically
 - gg. Qty. to consume – Provide a quantity to consume the material
 - hh. Quantity consumed – System will automatically update the field once quantity consumed
 - ii. Location code – System will automatically flow the location code from the header
 - jj. Department code – System will flow the dimension code automatically from the header
 - kk. Project code – System will flow dimension code automatically from the header
6. Under 'Vendor' tab provide the following details if it's a external/ hybrid execution
- ll. Vendor No. – Select a vendor number
 - mm. Vendor Name – System will automatically flow the vendor's name
 - nn. Address – System will automatically flow the vendor address from the master
 - oo. City – System will automatically flow the city
 - pp. Post code – System will automatically flow the post code
 - qq. Email – System will automatically flow the email
 - rr. Phone No. – System will automatically flow the phone number
 - ss. Currency Code - System will automatically flow the currency code

7. Click 'Release' 
8. Click 'Create Purchase Order'  Create Purchase Order
9. Click 'Post'  Post to consume
10. Click 'Close Order'  Close Order

7. How to create a Job Queue?

7.1 How to create a job queue for maintenance schedule creation?

1. Search Job Queue
2. Click 'New' 
3. Provide details like in the screen shot



...eue Entry Card | Work Date: 1/26/2023 ✎ + 🗑 ✓ Saved 📄 ↗

Report · 33073330 · Maintenance Schedule Batch Job

Process Reports More options

General Show less

Object Type to Run	Report	Maximum No. of Attempts	0
Object ID to Run	33073330	Rerun Delay (sec.)	0
Object Caption to Run	Maintenance Schedule Batch Job	Last Ready State	7/14/2021 3:22 PM
Description	Maintenance Schedule Batch Job	Earliest Start Date/Time	7/15/2021 5:28 PM
Parameter String		Expiration Date/Time	
Job Queue Category		Job Timeout	12 hours
User ID	JAYA	Status	On Hold

Report Parameters

Job Queue Entry Card | Work Date: 1/26/2023

Report · 33073330 · Maintenance Schedule Batch Job

Process Reports More options

Report Parameters

Report Request Page Options Printer Name

Report Output Type None (Processing only)

Recurrence

Recurring Job

Run on Mondays

Run on Tuesdays

Run on Wednesdays

Run on Thursdays

Run on Fridays

Run on Saturdays

Next Run Date Formula

Starting Time

Ending Time

No. of Minutes between Runs 15

Inactivity Timeout Period 5

7.2 How to create a job queue for maintenance notification?

1. Search Job Queue

2. Click 'New'

+ New

3. Provide details like in the screen shot

Job Queue Entry Card | Work Date: 1/26/2023

Report · 33073334 · Maintenance Schedule Notification

Process Reports More options

General Show less

Object Type to Run Report

Object ID to Run 33073334

Object Caption to Run Maintenance Schedule Notification

Description Maintenance Schedule Notification

Parameter String

Job Queue Category Code

User ID JEGA

Maximum No. of Attempts to Run 3

Rerun Delay (sec.) 0

Last Ready State 7/8/2021 6:47 PM

Earliest Start Date/Time 7/15/2021 6:48 PM

Expiration Date/Time

Job Timeout 12 hours

Status On Hold

Report Parameters

Report Request Page Options Printer Name

Job Queue Entry Card | Work Date: 1/26/2023

Report · 33073334 · Maintenance Schedule Notification

Process | Reports | More options

Report Parameters

Report Request Page Options Printer Name

Report Output Type

Recurrence

Recurring Job

Run on Mondays

Run on Tuesdays

Run on Wednesdays

Run on Thursdays

Run on Fridays

Run on Saturdays

Next Run Date Formula

Starting Time

Ending Time

No. of Minutes between Runs

Inactivity Timeout Period

Note:

- Provide a starting time based on the own requirement
- Provide No. of Minutes between run based on the own requirement

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