Dynaway Advanced Asset Management 2310.1

Release Date	Versions
📅 28 Sep 2023	Updates for Mobile Client 2310.1.1 Updates for D365 Finance & Operations 2310.1.1

Products Released October 2023

- Advanced Asset Management
  - Fault designer - Added cause and remedy, **NEW**
- Advanced Maintenance Checklists
- Analytics
- Contractor Management
- Data Manipulation Toolbox
- Electronic Signature
- Forms
  - Print Form, **NEW**
- Maintenance Insights
  - Maintenance Job Simulation, **NEW**
- Maintenance Requester
- Maintenance Strategy
  - Preventive Maintenance Overview, **NEW**
- Mobile Client - Planning Board
- Mobile Client - Work Execution
  - My Calendar, **NEW**
- Rapid Setup
- Safe Work
- STO (Shutdown, Turnarounds & Outages)

Labels are updated in en-us and da only.

The deployment package has been built on:

- *Installed product version: 10.0.32*
- *Installed platform version: Update56*

The mobile applications have been tested on the following browsers, all browsers using the latest build at the time of release:

- ***Desktop***
  - *Chrome version 116/117 on Windows 10/11 desktop*
  - *Edge version 116/117 on Windows 10/11 desktop*
- ***Android***
  - *Chrome version 116 on Android phone (running Android 12 and 13)*
- ***iPad***
  - *Safari for iPadOS 16.5.1*
  - *Edge and Chrome version 116*
- ***iPhone***
  - *Safari for iOS 16.5.1*

- *Edge and Chrome version 116*
- ***Known issue***: *If using the Edge browser on iPhone or iPad, and signing in to your AD account, closing down the browser will delete all cached data for the application and the user has to synchronize all data again.*

Installation guide for mobile can be found here: https://help.dynaway.com/mobile-am/getting-started/

Summary

In this version, of particular note are:

- **Finance and Operations**
  - **Advanced Asset Management**
    - You can now set up fault cause and remedy against asset types, making it easier to pick the right cause and remedy for the observed fault symptom.
  - **Forms**
    - You can now print out a report for forms, meaning you can print out permits for work orders.
  - **Maintenance Insights**
    - A simulation of maintenance jobs for an asset has ben implemented. Select for which assets you want to simulate maintenance jobs. The result is an overview of all combinations of maintenance jobs set up for the asset type. For each combination, you can verify whether there is a job type default, which parent project will be used, who will be responsible, etc. With the simulation, you can get insights into your set and get confident in knowing that the setup is correct.
  - **Maintenance Strategy**
    - You can now, for a selected asset, get a complete overview of your preventive maintenance set up for the asset. You can get information about when was the last time a work order was ended and when is the next expected work order. Use this to gain confidence in your setup.

- **Mobile Client**
  - **Work Execution:**
    - The new *My calendar* module allows users to see upcoming work in an agenda or month view. It also lets the users add their own planning notes to help the planner when scheduling work.
    - Job trade on requests can now be set and set as mandatory to help improve data.
  - **Planning board:**
    - Deep links from work orders on the planning board directly to the same work order in D365
  - **General**:
    - On installation, remember to set the *isMSAM* property to *true* in the *web.config* file. For on-premise, remember to fill in the *onPremiseInstance* and *AADValidAudience* properties.
    - On installation, remember to update the files in the *bin* folder as that will improve error messages related to installation and setup

Documentation

The following documents have been updated:

- **Analytics**
  - Entities
- **Advanced Asset Management**
  - **Assets**
    - Asset transfer includes functional location, open work orders, and open maintenance requests
    - Overview child asset changes
    - Set up default asset type attribute values
    - View functional location rounds
  - **Maintenance Plan**

- Use functional location hierarchy
- **Maintenance Requests**
  - Add remark and reason code when updating lifecycle state
  - Set up periodical creation of work orders using batch jobs
- **Related Work Orders**
  - Copy values from inital/parent work orders and checklist actions to related work orders
  - Project setup
- **Scheduling**
  - Filters based on scheduled start + Move scheduled start
- **Work Orders**
  - Add remark and reason code when updating lifecycle state
  - Alerts - Get an overview of overdue work orders
  - Attributes
  - Create or view maintenance request
  - Define whether work order types are active
  - Intercompany Work Order - Update customer requisition on project contract
  - Journal - Validate registered hours
  - Lifecycle state update service
  - Manual work order creation - Fault fields and job notes
  - Print work order report
  - Reports - Include header and line attachments on printed work order report
  - Update work order lifecycle state
- **Data Manipulation Toolbox**
  - **Work Orders**
    - Change lifecycle model

Documents updated for the mobile client:

- **Work orders**
  - Create hour registrations using a timer
  - Filter job types by work order types
  - Reschedule work when updating work status
  - Set a responsible worker group
  - Set responsible workers based on primary functional location

Updates for Mobile Client 2310.1.1
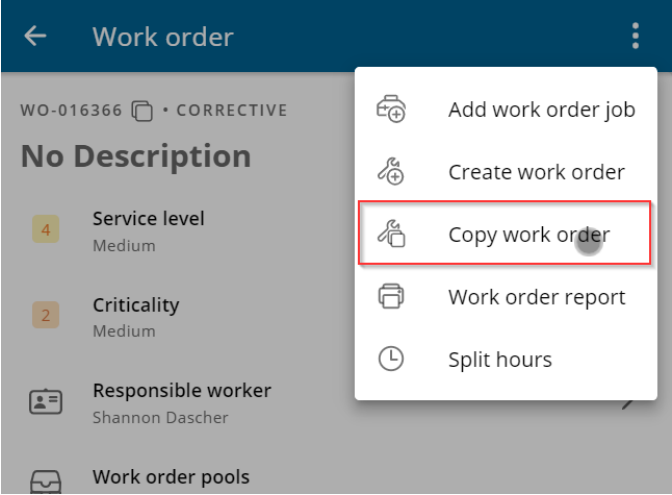
Installation guide for mobile can be found here: https://help.dynaway.com/mobile-am/getting-started/

Module configurations

Label	Description
Under the *Work execution* → *Maintenance request* node	
Maintenance job trade	Should the job trade field be shown on the request details page and when creating or editing requests
Maintenance job trade mandatory	If the job trade field is shown, should it be mandatory on the create page

Label	Description
Under the *Work execution* → *My calendar* node	
Enabled	Should the *My calendar* module be visible or not - defaults to **true**
Manage planning notes	Should the user be able to create and edit planning notes

Key	Client Release Notes
DMO -769 7	**Assets/Objects - Counters - Fixed UI when Counter Readings Don't Exist** Fixed an issue where the UI would not let the user switch counter type when no counter readings were available for the initial counter type.
DMO -592 5	**Assets/Objects - Items - Show purchase price trade agreement** If there is an active purchase price trade agreement on an item in the BOM or spare parts list of an asset/object, this information is now shown on the item. This can be seen anywhere we show BOM and spare parts. IMPORTANT: The *Purchase trade agreement* parameter must be enabled before running *Entity initialization*
DMO -785 0	**Attachments - Attachment Source Choice** Fixed an issue where the menu could not be opened to select a camera or local file as the attachment source when using the Edge browser on Android devices.
DMO -759 3	**General - Feedback** Updated the *Ideas & Feedback* button to an *Ideas* button and a new *Feedback & Support* button which prepares a mail for the Dynaway help desk.
DMO -783 9	**Installation - Update to Library File** In an effort to improve error handling and provide better feedback to the user in case something goes wrong, we have updated the communication layer between the web application and Dynamics 365. IMPORTANT: It is very important that when upgrading to the newest version, the files in the **bin** subdirectory are updated as well. Specifically the file Dynaway.Mobile.Server365.dll
DMO -747 2	**Panning board - Add D365 Deep Link** Added the option to open work order details in D365 from jobs and schedules on the planning board.

Key	Client Release Notes
DMO -7717	**Planning board - Grid Columns Too Wide** Fixed an issue where 2-week and 4-week views on smaller screens could set the data columns out of alignment with the date columns in the grid.
DMO -7512	**Requests - Allowed States** Limit the available Request lifecycle states based on the *Module Configuration -> workExecution -> requests -> allowedStages* for a given user or user group.
DMO -7102	**Requests - Create - Add Job Trade Field** Added a job trade field when creating requests. The visibility of the field is dependent on the module configuration *Work execution > Maintenance requests > Maintenance job trade*. The field can then be set as mandatory or optional based on the value of the module configuration *Work execution > Maintenance requests > Maintenance job trade mandatory*.
DMO -7275	**Requests - Enable the Requests Module Only** It is now possible to disable the assets / objects and work orders modules. The requests module can still be enabled, so only requests are available. It will still be possible to create a work order from a request if the proper module configuration is enabled.
DMO -6173	**Work Execution - My Calendar** A new module named *My calendar* is being introduced. With this module the technician can get an alternative view on work scheduled to them. They can see their upcoming work in an agenda view, sorted by the start date and time, as well as get a general overview of work planned for the month. If working with colleagues on a job, this is immediately visible as well as the current status of the job. The module is enabled by default and is available next to the work orders module in the navigation menus.

Key	Client Release Notes
DMO-6804	**Work Orders - Copy Work Order** A new action *Copy work order* was added to the Work Order details page. Replicating the existing workflow in D365, only some of the work order header properties can be modified when copying a work order. All lines, excluding schedules will be copied to the new work order. Module configuration *workExecution > workOrders > createWorkOrder* has to be enabled for this to be available.
DMO-7519	**Work Orders - Create - Work Order Job / Line Description** The character limitation on the *Job description* field when creating a work order or a work order job / line has been removed. The field is now a multi-line text area without character limitation.
DMO-7364	**Work Orders - Hour Registrations - Handled Multiple Clicks on the Save Button** Fixed an issue where the user was able to click multiple times on the *Save registration* button and create multiple identical hour registrations.
DMO-7196	**Work Orders - Item Registrations - Default Location Dimension Value** When registering an item for consumption that has both warehouse and location dimensions, and the warehouse has a default location, that location will be automatically selected.
DMO-7380	**Work Orders - Item Registrations** Fixed an issue with some characters (contained in the item ID) causing an error when searching for or registering an item.

Key	Client Release Notes
DMO-7417	**Work Orders and Requests - Create - Default Service Level** When creating new work orders or requests, the service level will be automatically set if a setup exists for the currently selected properties. As before, the expected start and end will update based on the service level.
DMO-7043	**Work Orders and Requests - Create - Alphabetical Sorting of Work Order Type, Job Type, Job Variant, and Job Trade** Instead of being sorted randomly, • Work order type • Job type • Job variant • Job trade on work order, job and request creation pages are now sorted alphabetically.
DMO-7580	**Work orders - Faults - Fault Cause and Remedy Related to Asset/Object Type** Updated the possible relationships between fault causes, fault remedies and asset/object types. It is now possible to set up the data in D365 to only have certain causes and remedies be available for certain asset/object types. If no such relations have been set up, all causes and remedies can be selected, which is the same as before this improvement.

19 issues

Updates for D365 Finance & Operations 2310.1.1

Key	Client Release Notes
DFO-4873	**Advanced Asset Management -** Fault Designer - Link Fault Causes and Fault Remedies to Asset Type It is possible to link fault causes and fault remedies to a specific asset type in the 'Fault designer' page. Then during registering faults in the 'Asset faults' page, you can select only those fault causes and fault remedies which have been set up on the asset type of the selected asset. If no fault causes / fault remedies have been set up on the asset type, then during registering fault you can select all fault causes / fault remedies from the system.
DFO-6811	**Advanced Asset Management -** Fault Designer - View Number of Faults Set Up The total number of faults set up for an asset type is now displayed in the grid-overview.

Key	Client Release Notes
DFO-4902	**Advanced Asset Management -** Maintenance Plan Procurement - Create Item Requirements From Item Forecasts It is now possible to automatically create item requirements for all active item forecasts on a work order when updating that work order's lifecycle state.
DFO-6731	**Advanced Asset Management -** Maintenance Request - Fixed Creating Maintenance Request from Assets and Functional Locations A bug has been fixed which caused that it was impossible to create maintenance request from the assets overview and the functional locations overview pages because of an error related to casting object of type form control.
DFO-6428	**Advanced Asset Management -** Maintenance Schedule - Discarded By Added 'discarded by' information to the 'All maintenance schedule' list page.
DFO-6422	**Advanced Asset Management -** New Entity for Asset Default Attributes A new entity has been created for data regarding asset type default attribute values.
DFO-6735	**Advanced Asset Management -** Work Order - Fixed Displaying Incorrect Parameter in Scheduled Batch Job for Updating Lifecycle State A bug has been fixed which displayed an incorrect work order lifecycle state after clicking the 'Parameters' button on a scheduled batch job for updating work order lifecycle states.
DFO-5188	**Advanced Asset Management -** Work Order - Item Lookup with Forecast in Inventory Journal Lines A new feature 'Dynaway - Item lookup with forecast in work order inventory journals' has been provided in the 'Feature management' workspace. After enabling it, a new 'Forecast items' tab is visible in the item lookup related to the 'Item number' field in work order inventory journal lines. This tab displays all active forecast items added to the current work order maintenance job forecast.
DFO-6343	**Advanced Asset Management -** Work Order Maintenance Job - Reference ID Hyperlink A small improvement has been added to the existing field 'Reference ID' related to work order maintenance jobs. The ID is now a hyperlink, enabling easy access to related information.

Key	Client Release Notes
DFO-5185	**Advanced Asset Management -** Worker - Site and Warehouse It is now possible to set up default site and warehouse for a maintenance worker, which are then used to initialize work order item journal entries. Site and warehouse are also shown in the overview of maintenance workers, which is part of the product Maintenance Insights.
DFO-6755	**Advanced Maintenance Checklists -** Checklist Review - Link to Maintenance Request Fixed a missing link from maintenance request to work order lines, when a checklist line is resolved by creating a new maintenance request.
DFO-6914	**Advanced Maintenance Checklists -** Checklist Review You can now see if a maintenance checklist line has a checklist action associated. If an action is associated, users will get an error resolving the line.
DFO-5347	**Data Manipulation Toolbox -** Maintenance Job Type - Edit Maintenance Job Type Defaults Record It is now possible to change values (e.g. functional location, asset type) on an existing maintenance job type defaults record after clicking the 'Edit record' button on the 'Maintenanance job type defaults' page.
DFO-6668	**Data Manipulation Toolbox -** Maintenance Request - Change Type A new functionality has been added which allows users to update type on multiple selected maintenance requests.
DFO-6900	**Dynaway -** Capability From the capability overview you can now open a link to the 'What's new' page. The link will show what's new in relation to version major.
DFO-4670	**Dynaway -** License Expiration If you have a license which will expire within 30 days, a warning will be given to all users logging into Finance and Operations. This enables you to take action and obtain a new license before expiration.
DFO-6606	**Forms -** Print Report You are now able to print out reports for forms.

Key	Client Release Notes
DFO-6604	**Maintenance Insights -** Maintenance Job Simulation From an asset, you can now calculate a complete overview of the setup of maintenance jobs. It helps to verify the setup of maintenance job type defaults and work order project setup.
DFO-6825	**Maintenance Insights -** Maintenance Worker Overview - User Startup Company and Preferred Time Zone Startup company and preferred time zone has been added to the maintenance worker overview. This enables users to verify setup users for mobile more easily.
DFO-6562	**Maintenance Strategy -** Preventive Maintenance Overview With the preventive maintenance overview you can get a combined detailed view of all your setup of preventive maintenance for a selected asset. *How it works* - in one view you can see all related maintenance plan lines and maintenance rounds for an asset. *How to use* - you can verify setup in relation to job type defaults, verify current and next work orders.
DFO-6818	**Mobile -** Data Synchronization Being Stopped By Special Unicode Character '\u0002' A bug has been fixed related to stopped mobile synchronization when a special Unicode character '\u0002' (start of text) was included in any string value sent to the mobile client from the Finance & Operations platform. Now, the '\u0002' character is removed from data sent to the mobile client and synchronization works OK.
DFO-6701	**Mobile -** Fixed Opening Lists After Removing Functional Location From Worker A bug has been fixed related to the problem with opening any list in the mobile client after removing functional location from a worker.
DFO-6978	**Mobile -** Handlers - Enable logging For all handlers, Enable logging, is now turned of by default. This will only affect new installations. *Dynaway recommends turning off all logging for handlers unless you are experiencing issues. In relation to logs, we also recommend running the periodic job Mobile framework cleanup jobs recurringly, for example once a week.*
DFO-6605	**Mobile -** Image Size Fixed a bug which caused some of the asset images to not be resized before sending them to the mobile client.

Key	Client Release Notes
DFO-6799	**Mobile -** Item Registration Fixed a bug which caused the project category on item registration to be based on the item's project category instead of project category on work order line project activity. This caused, among other things, a wrong line property to be assigned for item registrations.
DFO-6868	**Mobile -** Metrics Fixed a bug where metrics for non-default module configurations were calculated incorrectly.
DFO-6600	**Mobile -** Work Order Date Fixed a bug which caused a wrong date for a work order to be displayed in the work order header view.
DFO-6908	**Rapid Setup -** Error on Inport Fixed import errors when a table is imported for which configuration key is turned off.
DFO-6973	**Rapid Setup -** Updated Setup Packages The following packages have been updated with new data: - Asset type defaults - Faults - Attributes types - Mobile - Risk assessments

29 issues