QAD Enterprise Asset Management Release Notes

April 2010

These release notes include information about the latest Enterprise Asset Management fixes and changes. These changes may affect the way you implement and use Enterprise Asset Management.

Review this document and the Enterprise Asset Management errata *before* proceeding with any phase of a Enterprise Asset Management implementation.

QAD highly recommends that you implement the latest Enterprise Asset Management release available. Check the QAD Web site to make sure you have the latest release notes, user guide, installation errata, installation guide, and installation media:

http://support.qad.com

Use the following list to find a specific release:

Release Notes for Current Release

Enterprise Asset Management Version: 12.1.0

Date: April 2010

QAD Enterprise Applications Versions: QAD 2009 Enterprise Edition

Installation Changes

Installation Guide: QAD Enterprise Asset Management has been updated and revised. The new item number is 78-0812C. Changes to the installation introduced by the 12.1.0 release are included in the updated installation guide.

Application Changes

1. Horizontal Approval

   Horizontal approval requires a financial approver, rather than just a departmental approval like the cost center-based, account-based, and user-based methods do. You still include a departmental person but the routing changes from a departmental approver to a financial approver. The financial approver must be the final approver.

2. Requisitions

   EAM 11.x had two types of requisition modules: a single requisition and a multi-line requisition. EAM 12.1.0 now only offers a multi-line requisition. A user has the ability to create a single requisition header record and one or more lines are added to purchase stock, non-stock, and contractor service type items. Only a single vendor is allowed on a requisition header.

3. Sale of Spares from a Stores Requisition List

   This function enables spare parts to be sold from a stores requisition list. For example, a manufacturer could build a tool for a customer that is then shipped and invoiced to the customer. Spare parts could also be included with the tool that are issued from the manufacturer spare parts store room. These parts are issued from the Stores Requisition module and are lined to a Sales Order from QAD ERP, which is where the invoicing will take place to the customer. Typically, this function is used with Projects.

4. Part Copy Feature (Site to Site)

   Under Action in Inventory, a user can copy a part from one site to another. This feature does not allow a user to modify the part number or description to maintain consistency between sites.

5. Alerts

   Maintenance Priority codes can be set to send out pager alerts to technicians. This enables users who are away from a computer to receive mail notification regarding a critical piece of equipment that may be out of service.

6. PM Duration

   A user now can establish an estimated Duration in Days for each PM template. This data will then create a “completion date” on the PM work order when the PM is issued. This date calculates using the start date plus the Duration to create a completion date. This data is very useful for supervisors to evaluate if the technicians are completing the work in the appropriate amount of time.

7. More User-Defined Fields

   Additional user-defined fields have been added to the Maintenance module.

8 Projects that now support Customer-Funded and Engineer-to-Order type projects

In EAM 11.1, engineers were able to track Expense or Capital type projects. EAM 12.1.0 offers project engineers the ability to manage Customer-Funded or Engineer-to-Order (ETO) projects. You may find customers interchange these two terms.

An example of Engineer-to-Order project is where the manufacturer will build a product per their customer's specifications. The product is then shipped and invoiced to the customer.

A Customer-Funded project is one on which a customer will provide the funds to engineer and produce a product. This product will end up being owned by the customer, but the manufacturer will maintain it and use it in production to produce a product for that customer. This is more commonly seen in the automotive industry, where they may fund the manufacturer to create a tool.

In both examples, the customer funded these projects. It is critical to accurately track and initiate payment requests from suppliers for ETO or customer-funded projects. The engineer needs real-time visibility to the invoicing or funding side of the project.

The existing EAM Project solution already offered real-time cost tracking for materials (internal and external), labor cost, and contractor cost. The module has been enhanced to set up payment schedules and trigger an invoice event by alerting the engineer through e-mail when it is time to process an invoice.

EAM did not add native invoicing capability, but instead took advantage of the existing Sales Order/Invoicing capabilities that QAD Enterprise Edition offers and provided an interface between EAM's Projects module and the Enterprise Edition Sales Order Ship functionality.

Based on the supplier's payment schedule, EAM triggers automatic notification to initiate an invoice from the ERP. This ensures the project is being properly funded and an engineer is able to carefully monitor in real-time the project profitability, unfunded amounts, write-offs, and so on.

User Interface Upgrade

EAM 12.1.0 offers an upgraded user interface. Some functions were not ported over to the new interface this release. These include:

- Batch Job Routines
- Batch Job Scheduler
- System Control Maintenance and System Site Maintenance
- User-Defined Mail
- System Registry
- Sequence Maintenance.

These functions remain available in EAM 12.1.0, but are implemented through the older EAM 11.1 interface.

The following functions were available in EAM 11.1 and are not available in EAM 12.1.0:

- Warranty Maintenance
- Expert Repair System
- Inventory Master
- Revision Control
- Downtime
- Blanket Purchase Orders
- Quotes

- Production Driven Maintenance.