



ALECTRIS

How Alectris makes sure all technicians have the info they need thanks to resco.Guides

Implementation Partner

HG Technology Limited

Industry

Energy

Organization size

40 employees

Headquarters

**Industrial Area of Thessaloniki 57022 Sindos, Greece and
Corso Buenos Aires 79, 20124 Milan, Italy**

Solution

resco Guides

Resco Mobile CRM for Dynamics 365

Keybenefits

- **1st choice of information for field engineers**
- **81 guides, 130 manuals and datasheets**
- **1-2 days to create an onboarding guide**

About the company

Alectris takes care of renewable energy assets. With roots in solar plant construction, it has grown into a global service and software provider. It operates in mature solar markets in Europe, the USA, Southeast Asia, and the Middle East.

Alectris uses ACTIS ERP, its own proprietary renewable asset management and monitoring platform built on Dynamics 365. This helps it achieve optimum performance of assets, reduce internal and external costs, and streamline operations. ACTIS ERP consolidates technical, operational, and financial data and reporting into a single place.

Alectris selected and implemented Resco Mobile CRM as its mobile app for field technicians.

With its comprehensive suite of services & products, Alectris reduces risk and delivers maximum financial returns for solar investors & plant owners worldwide.

Business challenge

Alectris's field site engineers fill thousands of work orders globally each year. They spend most of their time in the field, performing preventative and corrective maintenance. They take care of hardware made by various producers; the assets are very complex.

The field engineers need to resolve issues quickly and efficiently, ideally on their own, without engaging anyone else. They need robust onboarding and swift access to manuals and documentation to do that.

Senior and junior engineers need to share information on how to proceed with tasks. When a senior engineer leaves the company, their tribal knowledge must be retained.

Alectris has used Microsoft SharePoint to keep some manuals and documentation in one place. It had several disadvantages.

- The engineers need to access everything on the go. They could not reach the cloud drive when they were in a place with low or no connection.
- The manuals and documents were uploaded by back-office staff. They didn't have a perfect overview of what the engineers needed. Some simple tasks were not documented. They have raised questions from junior engineers and kept the seniors busy answering them.

Solution

Alectris chose resco.Guides to capture, standardize, and distribute all instructions.

Implementing resco.Guides

resco.Guides works with Alectris's proprietary ERP software and is seamlessly aligned with Resco Mobile CRM.

The company placed all the manuals and instructions directly into the Mobile CRM. Engineers use it daily, so it is a good spot to have everything at hand. They have the device with the app conveniently at hand while working.

Creating the guides

"Alectris engaged the engineers in creating the guides. Data, including photos, have been harvested in the field.

The knowledge manager asked the technicians to suggest a number of guides that would be useful to have.

Then he assigned these topics to field service engineers. He provided them with office hours to be able to create the guides. The most experienced technicians have written guides.

After a guide was written, a knowledge manager in the back office reviewed it, designed it, and published it.



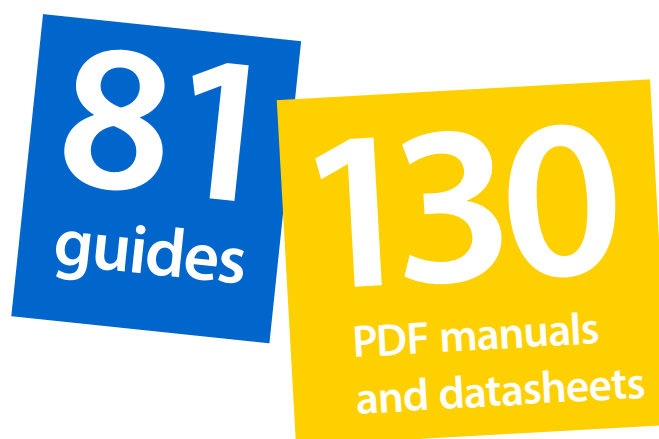
Overall, it takes about one to two working days to create an onboarding guide.

Once the guide is uploaded, field engineers can access everything on the go, even with low or no connection.

Using the guides

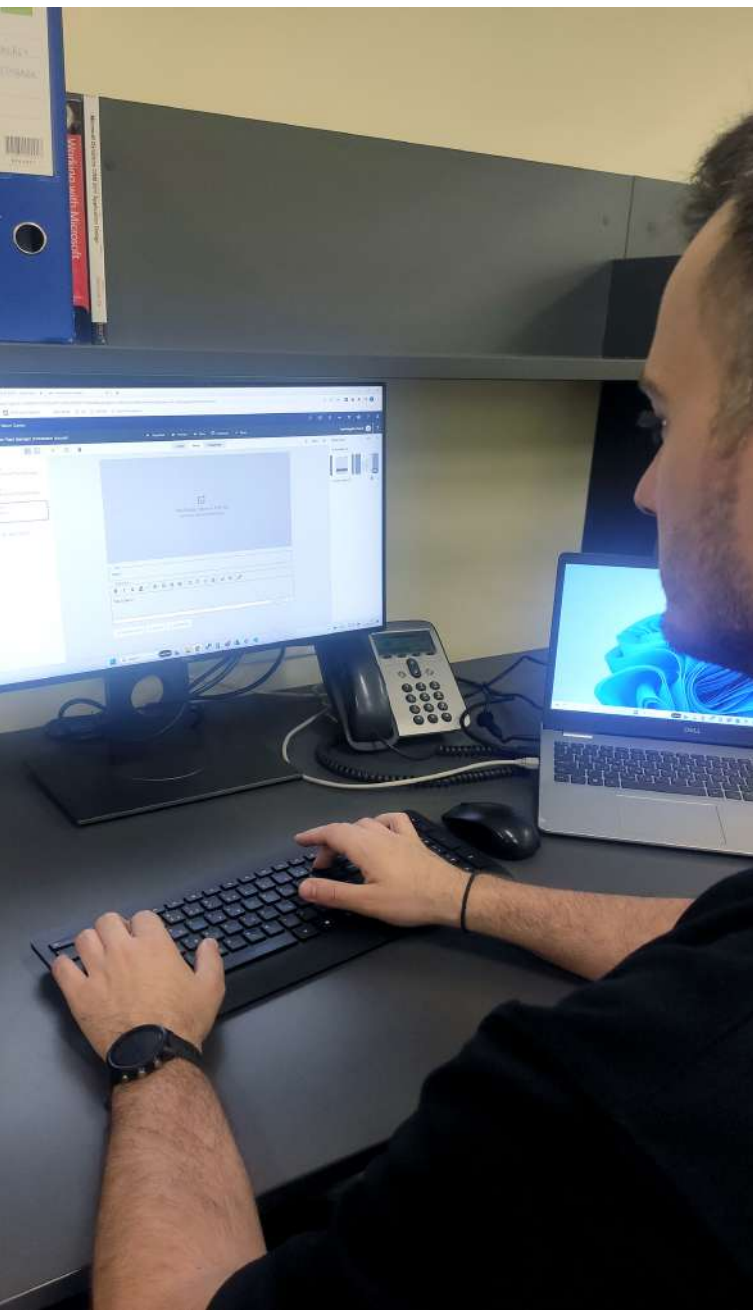
The guides are related to standard working procedures. 70 % of the guides are meant to be read by new team members while onboarding. The rest describes more complex tasks that even experienced engineers can find helpful.

Manuals and datasheets exist for equipment like inverters, uninterruptible power supply systems, or photovoltaic panels. These can be helpful to both new members and experienced field site engineers.



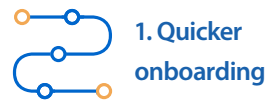
Workers can access the guides directly in the work order form or through the Guides menu, where they can search for any guide they need.

- **The adoption was immediate.** Field service engineers started to use the guides right after they got the information that the guides were uploaded.
- **The guides were helpful to the technicians in every single case.** They find texts enriched with pictures and diagrams the most useful.
- **The guides are 1st choice of information for technicians.** If there is no guide on a particular topic, they call a colleague or search the internet.
- **Techs use the guides approximately once or twice a week** when they need to get familiar with new equipment, solve new issues, or are frustrated and not moving forward. In the beginning, when onboarding, they use the guides almost daily.
- **Field technicians like using the app.** It's intuitive and straightforward. They don't feel lost in it.



Benefits

Implementing resco.Guides to ACTIS ERP, based on Microsoft Dynamics 365, has brought Alectris multiple benefits.



1. Quicker onboarding

The guides save time when onboarding new field service engineers. They quickly and conveniently provide them with a single source of information verified by the knowledge manager.

"Guides saved me in my early days at the company when I encountered some devices for the first time, and there was no human being available to provide me with onboarding."

Bhargay, field service engineer



2. Saving the time of skilled staff

Instead of repeatedly answering the same queries from junior staff, senior staff members can now focus on other tasks.

"We usually assign one engineer to work with the new employee for a specific period. Even with the existence of guides, we still have to assign an engineer to assist him, but it takes less time. A rough estimation would be 25%-50% less time will be needed if we have guides for all preventative maintenance tasks."

Anastasios Nedos, O&M Manager at Alectris



3. Retaining important information

Complex tasks are now documented in the guides, meaning less technical information loss if an experienced engineer leaves the company.



4. Improving the days of field service engineers

In the guides, the field service engineers have all the information they need to fill their work orders. That means they need to spend less time googling manuals and calling colleagues. Every time, they are sure they

have an up-to-date manual for the equipment they are inspecting or servicing.

All the necessary information is accessible on the go, the guides load quickly and are readily available. Alectris's field service engineers often work in rural areas with poor internet connection and having the guides available in offline mode is vital for them.

"Hunting for information on the internet is not very easy. When I see there's a guide available, I am happy. The guides were very useful to me. The instructions were quite precise, I followed them, and everything went alright in the end."

Nick, field service engineer

Future plans

The plan is to localize the guides into multiple languages. Alectris operates in several countries. They need the guides available in multiple languages – English, Greek, and Italian.

Even though Alectris uses different equipment in each country, the tasks are very similar. That means they can share some of the guides for work procedures.

More guides are to be created, and more tasks are to be documented.

Also, resco.Labs team is working on ways to reduce the guides creation and localization effort even further using AI and smart features.

"I believe that the guides add value to our standard working procedures. Utilizing them saves time on the field. Without them, technicians would contact each other to exchange knowledge, or they would have asked extra questions to Operations & Maintenance managers, or they would have been looking for such information on the web."

Anastasios Nedos, O&M Manager at Alectris



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