"How to" for TM Docking.

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How to create a docking project?

1. Click [Docking] → [Docking] (If done in the office, make sure the correct "unit" is selected in top menu).
2. Click [New] to the far left in the top menu. The following view will appear.

3. Select the "estimated" start date. (This can be changed later on in the project)
4. Select one of the following options:
   - Create a new empty docking project.
   - Use the Docking template (if you have one)
   - Use a copy of a previous docking project as a start point for this docking project.
   (You can choose to include or exclude all "price details", "job descriptions", "specifications", "items" and/or "documents")
5. Click [OK]
6. A docking project is created with the name "Docking XXXX"
   (Where the X's represent the year you set as estimated start date)
7. Click the "General" tab to alter any of the project details.

- Name
- Description: The information added here will be included on the front page of the "Docking" project description. Clicking the add [<] button to the right of this field will retrieve vessel details, added for the vessel. (in [Unit] →[Details])
- Start date, can be changed.
- "Price" will be calculated, when required data is available
- Docking Category
- Project number
- Status

How to add a docking specification group?

The docking project consists of docking specification and job items.

These items are (and must be) organized in groups. To create a specification group, do the following:

1. Click [Docking] → [Docking] and select the docking project you wish to add the group to.

2. Click the [Add Docking specification group] ![icon], found in the docking item list's menu bar.
   Selecting an item in the item tree structure will show you the details for the item in the details window.
   The item or group name in the tree structure will appear once the item has been saved.
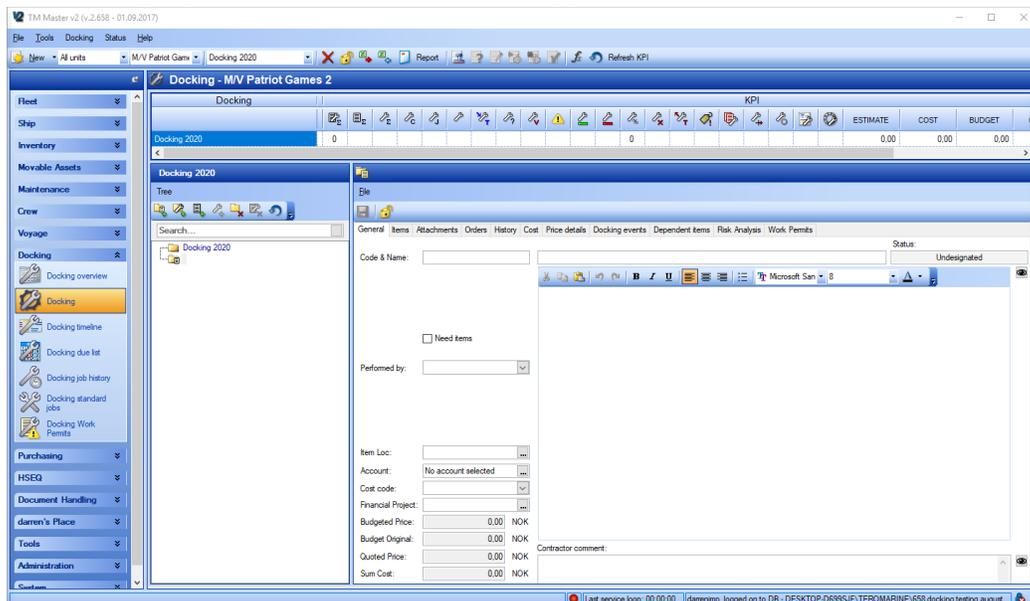
3. Add specification group details
   - **Code/number** for the item (The item list will be sorted alphabetically by this code/number)
   - **Name** for the Specification item group.
   - **Description** for the group.
   - **Account:** You can select an account expenses for this item group.
   - **Last changed:** Here you will find the last changed date and who made the change.
   (All changes can be found in the "history" log for the item group.)
   - Tick the "**Needs Items**" box to signify that the job requires orders to be placed for items or services before the job can be carried out. You will be able to sort items later, based upon this selection in the module [Docking Overview]

- Depending on who will be responsible for this specific item group, you can assign this by selecting a "**Performed by***" value.

*The source for the list of "performed by" is a code table found under [Administration] → [Codes]

How to add a docking specification item?

Once you have created a "docking specification item group" as described in the "how to.." above, you can create a specification item or detail.

1. Click [Docking]→[Docking], and select the specification group, you wish to add the item to.
2. Click the [Add docking specification item] button, in the docking item list's menu bar.
3. Edit the details for the item, in the details view ("General tab")
4. The details are exactly the same as for a specification group described in the "how to.." above.

How to add a docking job group?

1. Click [Docking] → [Docking] and select the docking project you wish to add the group to, using the docking project selector in the top menu.
2. Click the [Add new docking job group] button, in the menu bar for the docking item list.
3. The form for the "job group" is identical to the specification group and item, described in the "How to add a specification group?"

How to add a docking job item?

1. Click [Docking] → [Docking] and select the docking project that you wish to add the job item to.
2. Select a job group in the structure.
3. Click the [Add docking job item] button, in the menu bar for the docking items.
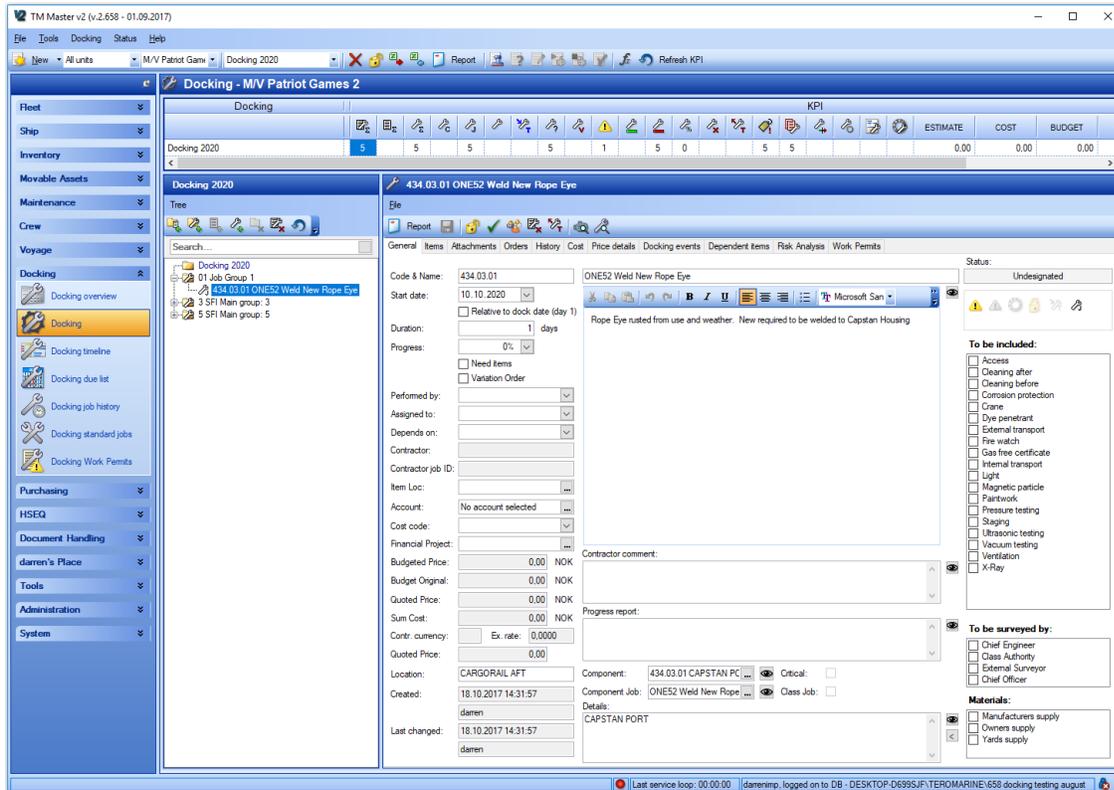
4. This will open an additional window where you can choose the type of job you want to add to the docking project. Make your choice (example 'Free text') and then click OK
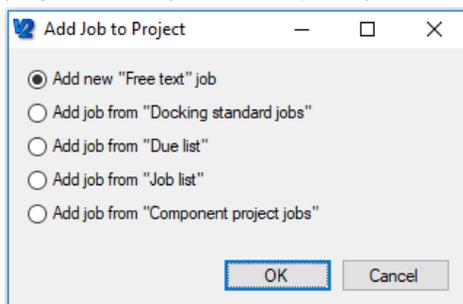
5. Fill in the fields that you have data for and click Save

Note 1: The job item detail form has a large number of fields which can be filled in. Some of these fields are common for groups and items (jobs and specifications). Please refer to the Docking Job detail form field list for more details.

Note 2: As can be seen from the screenshot above, there are 5 options when creating a job. 'Free text' is the simplest, giving you just a blank docking job form to fill in. The other options are dealt with later in this manual.

How to postpone jobs in the due list to a docking project?

As docking project leader, or the person who is responsible for the project, you may wish the crew for the vessel to do an assessment of which jobs they want to add to your docking project. You can give users onboard full access to the [Docking] module. This will allow the crew to contribute directly to your docking project. If you wish to keep a certain control on the jobs added and their descriptions, you might want to allow users to only mark (postpone to Job List) certain jobs as docking jobs. You can then later review the suggestions and choose which to include. The following is a description of how to achieve this.

First is a description of how the user can mark a due job as a docking job.

1. Click [Maintenance] → [Due]
2. Locate and select the job or jobs you wish to include in the docking project. To select two or more jobs, click and hold the [CTRL] key, then click the jobs you wish to include.
3. Click the [Postpone] 🌐 button found on the top tool bar.
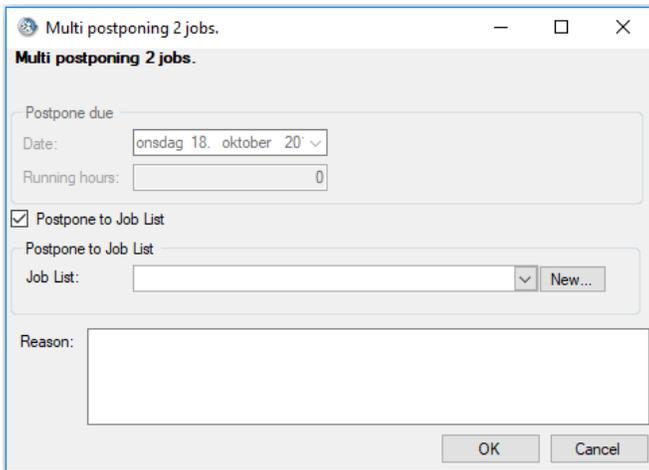
4. Tick the "Postpone to Job List" check box.

5. Select an existing Job List from the dropdown or create a new one by clicking the [New] button. If you create a new Job List the following dialog will appear.

6. Add a Job List name, set a due date for the Job List, and add a description or remark to enable other users to see what this particular Job List is for. If you have more than one "Job List" on this vessel. Then click [Close]

7. Verify that the Job List you have just created is now selected in the "Postpone to Job List" dialog.

8. Add a reason for the postponement.

9. Click [OK].

The job(s) has now been added to a "Job List", and the crew has done their part. Here is how to move a job from a project to your docking project.

How to move a job from a TM Master v2 "Job List" to your docking project?

1. Click [Maintenance] → [Job List]
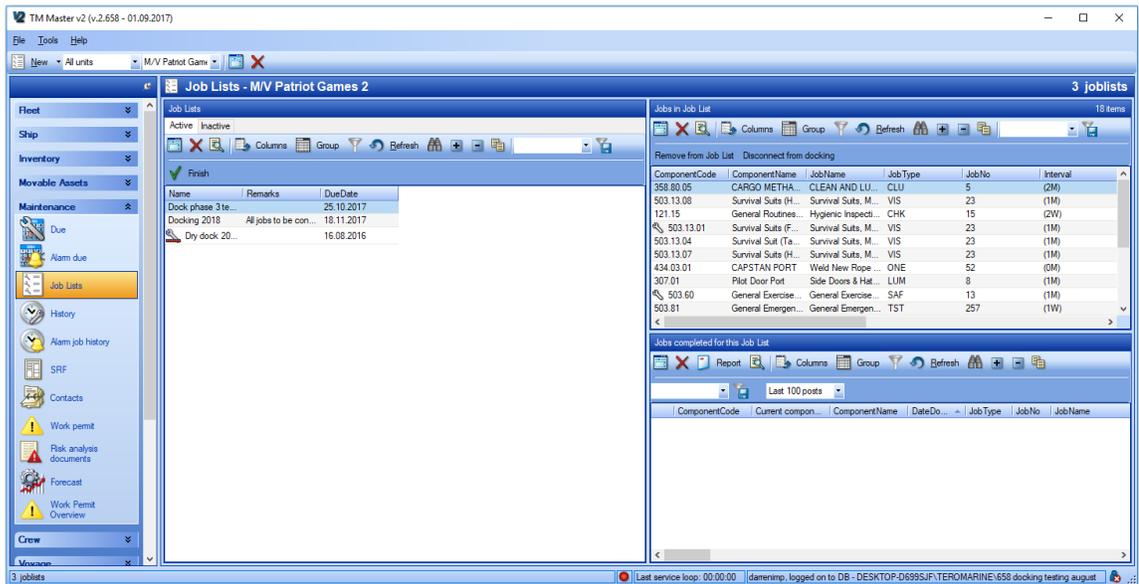
2. Select your Job List in the pane to the left.
3. The jobs added to this project are listed in the panes on the right. Jobs not signed out are listed in the upper pane and jobs that are signed out are in the lower pane.
4. Select one or more of the jobs you wish to include in your docking project.
5. Right click and select "Add to docking specification"
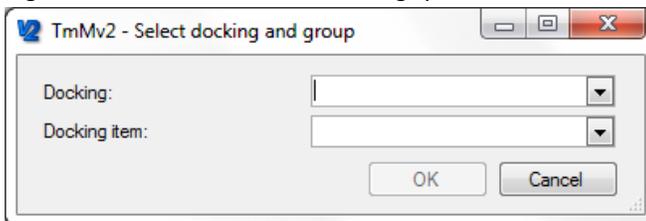
6. Select the dry-docking project you wish to add the job to.
7. Select the "Docking job group" you wish to add the job to.
8. Click [OK].
9. You will then be asked to decide if you want to copy items, documents and risk analysis documents to the docking job. Tick the options that you want and click ok
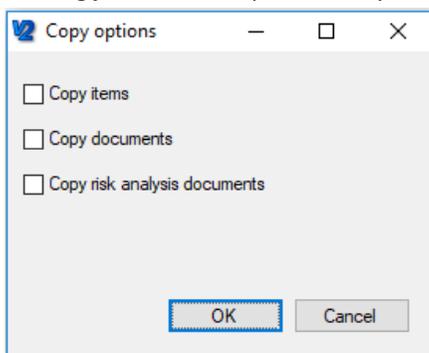
10. The data for the job will now be transferred into the "Docking Job item" form, allowing you to change the job description to fit your docking project if required, and you can set the job item's specifics etc.

11. Once a job in the "Job List" has been added to your "Dockinging project" it will be marked with a spanner symbol 🔧 as shown below. (If you just added the job, you might need to click the [Refresh] 🔄 button to update the view

This operation can also be performed directly from the docking module by following this procedure

1. Click [Docking] → [Docking] and select the docking project that you wish to add the job item to.
2. Select a job group in the structure.
3. Click the [Add docking job item] 🔧 button, in the menu bar for the docking items.
4. Select 'Add job from "Job List" and Click OK
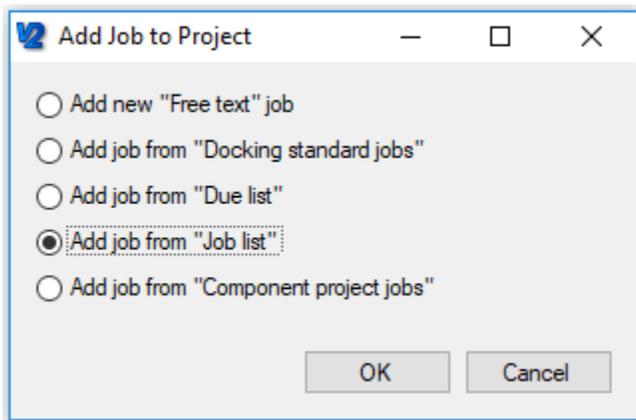
5. This will open a separate window showing the Job List overview
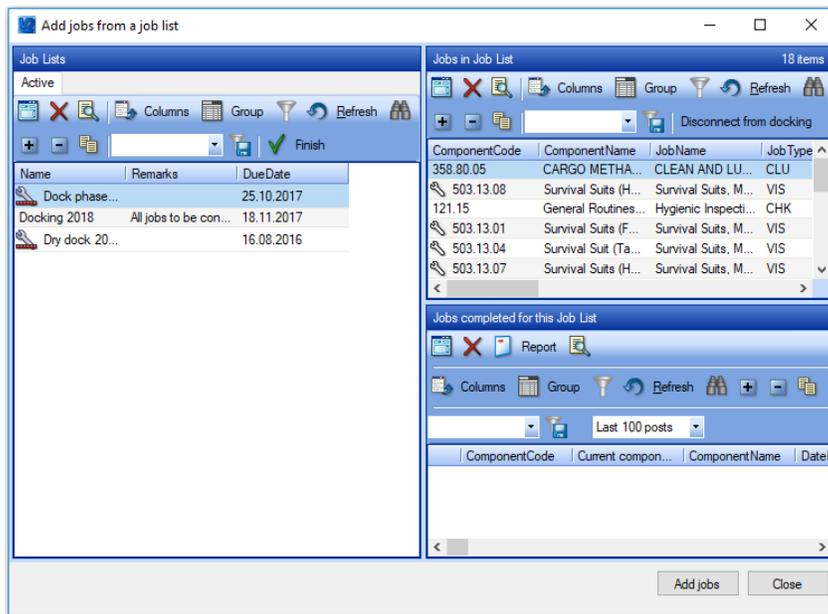
6. Follow the previous instructions from step 2 to complete the operation.

How to add a job directly from the due list to a docking project?

It is possible to retrieve jobs from the vessel's due list and add them directly to a dry-docking project. (or at least it feels more "direct" than the procedures described in "How to postpone jobs in the due list to a docking project?" and "How to move a job from a TM Master v2 "Job List" to your docking project?")

This is how it is done:

1. Click [Docking] → [Docking] and select the docking project that you wish to add the job to.
2. Select a job group in the structure.
3. Click the [Add docking job item] ![wrench icon] button, in the menu bar for the docking items.
4. Select 'Add job from due list'
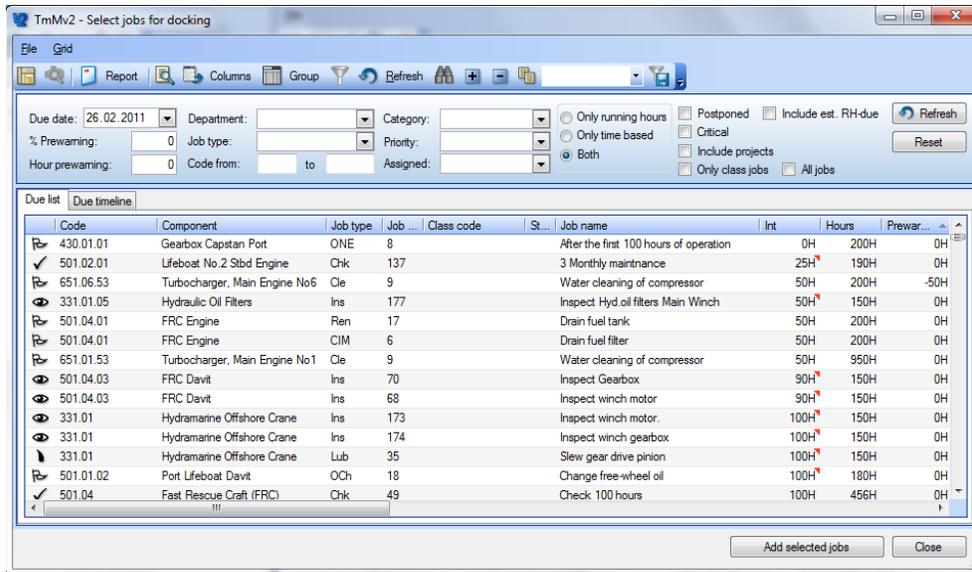
1. The full [Due] list found under [Maintenance] will appear, allowing you to find and select the due jobs you want to add to your project. How to use the [Due] list is described in the "Maintenance" part of the user manual.
2. When you have made your selection, click the [Add selected jobs] button to the lower right.

A due job added to a dry-docking project is "postponed" to a "Job List". An overview of existing "Job Lists" can be found under [Maintenance] → [Job Lists]. Please see the documentation for "Job Lists" for more information on these types of projects.

3. Select an existing 'Job List' to contain the postponed jobs, or create a new one by clicking [New]
4. Select the "docking project" you wish to add the job(s) to
5. Select the "Parent item" or "Job item group" you wish to add the jobs to.

6. Click [Add jobs]

Organize jobs in corresponding SFI-groups

If you choose to organize your docking jobs in "Job item groups" based upon the SFI code, tick the "Organize jobs in corresponding SFI-groups". All jobs linked to component 601.01 will then be placed in job item group 6 etc. The system will automatically create job item groups for the job items. An example of how this would look like in the docking item list is shown to the right.
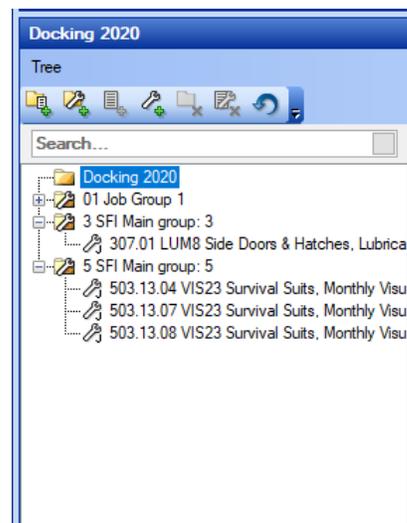
How to create a docking job from a docking standard job description?

1. Click [Docking] → [Docking] and select the docking project that you wish to add the job item to.
2. Select a job group in the structure.
3. Click the [Add docking job item] ⚒ button, in the menu bar for the docking items.
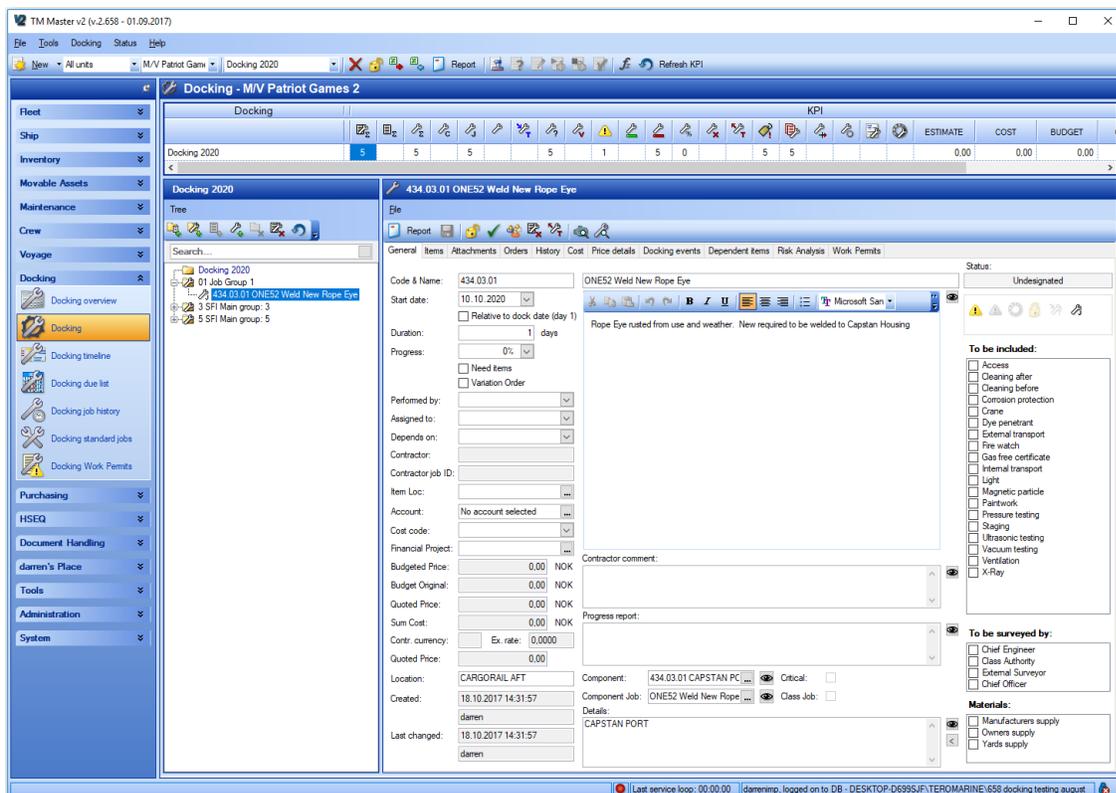
4. This will open an additional window where you can choose the type of job you want to add to the docking project. Select 'Add job from "Docking Standard Jobs"' and then click [OK]
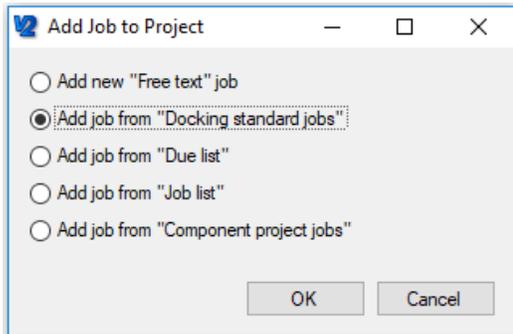
5. Select the description you want from the list and click [OK]
6. A new docking job will now be created. Fill in the fields that you have data for and click Save

Note 1: The job item detail form has a large number of fields which can be filled in. Some of these fields are common for groups and items (jobs and specifications). Please refer to the Docking Job detail form field list for more details (Appendices section at the end of this manual) .

How to create a predefined docking job for a component?

A docking job specification can be time consuming to create for each docking project, and it is often the same or almost the same job done each time on some of your components. With that in mind, it would be useful to predefine docking jobs for certain components and include them in your docking projects. Here is how to add such a job description to a component in TM Master V2.

1. Click [Inventory] → [Components]
2. Locate and double click the component you wish to create a predefined docking job for.
3. Click the "Docking" tab.
4. Click the [Add new docking job] button.
5. A docking job item view will appear and you can specify your job as you would do in the docking module. You can also predefine the "price details" for the job. Price details are discussed in "How to add a price detail to a docking item or group?"
6. Save and close.

How to include a predefined docking job item in a docking project?

1. Click [Docking] → [Docking] and select the docking project that you wish to add the job to.
2. Select a job group in the structure.
3. Click the [Add docking job item] button, in the menu bar for the docking items.
4. Select 'Add job from Component project jobs'
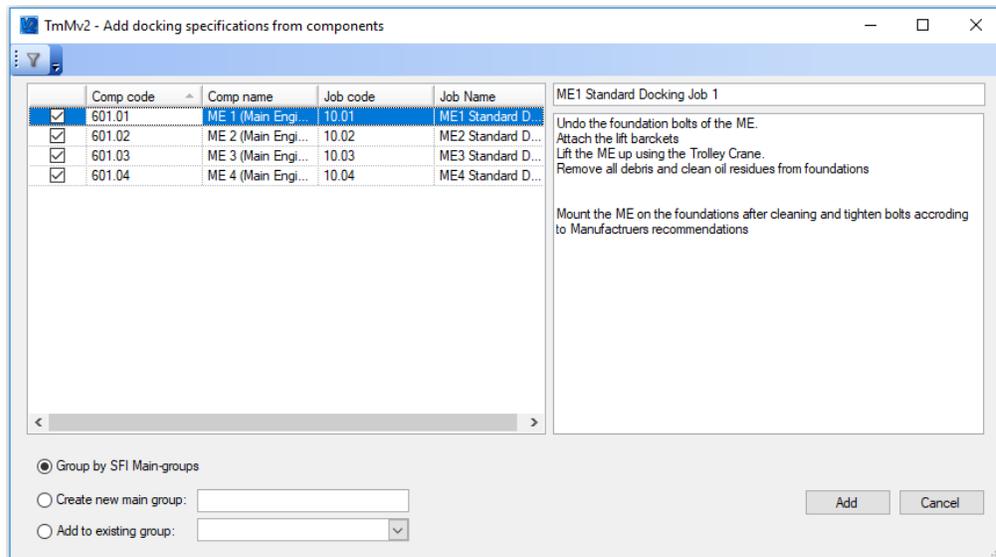
5. Select the predefined jobs you wish to include in your docking project from the list of all existing predefined jobs, by ticking the job (by default all jobs are ticked).
6. Clicking on one of the jobs will show the job description for the selected job in the window to the right.
7. Select which job groups you want the selected jobs to be added to.
    a. "Group by SFI Main-groups" will create a group or add it to a group for all jobs attached to a component within the main SFI groups. An example of how this looks can be found in the chapter "How to add a job directly from the due list to a docking project?"
    b. Create a new job item group
    c. Add the job to an existing group.
8. Click [Add]

How to change the connection to a component job

1. Click [Docking] ➔ [Docking] and select the docking project that you wish to edit.
2. Select a docking item in the structure pane that already has a component job attached (jobs with this icon), that you wish to change the component job connection for.
3. On the general tab, click the button to the right side in the component job field
4. This will open a window similar to the due list, but only containing jobs attached to the linked component
5. Select the job that you wish to change to and click [OK]
6. You will then be presented with the postpone job window where you can select which job list the component job should be attached to. Select the job list, type a remark and click [OK]

7. You will then be presented with the options for changing the component job. Make your choices and click [OK]

How to add spare parts to a docking item

1. Click [Docking] → [Docking] and select the docking project that you wish to add spares to.
2. Select the docking item in the structure pane that you wish to add spares to.
3. Select the 'Items' tab
4. Click the 'Add Item' button
5. Select one or several items from the list, Click [OK]
6. Set the quantities for each item, click [OK] when finished

How to add files and documents to a docking item or group?

You will probably need to include additional information, such as images, drawings, documents and other files to your docking items or groups.

1. Click [Docking] → [Docking]→ Select the docking project and item or group you wish to add the file or document to.
2. Click the "Attachments" tab
3. Click the [Add file] Add File... button found to the left on the toolbar.
4. Select the file you wish to add.
5. Enter a description for the file.
6. Click [OK]
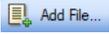
If you select any of your items, you will find all documents attached to that item, by clicking the "Attachment" tab.

If you select the top level of your docking project and click the "Attachment" tab, all attachments either linked to a group or item within that project will be listed.

How to add pictures to docking items for the report

1. Click [Docking] → [Docking] and select the docking project that you wish to add the picture to.
2. Select the docking item (job or specification) that you wish to add the picture to
3. Select the 'Attachments' tab
4. In the lower pane, click the [Add Picture] Add Picture button
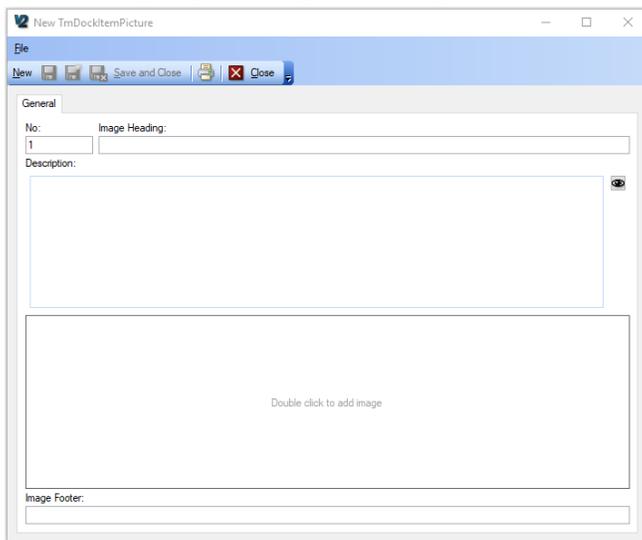
5. Fill in the Heading, footer and description as you wish
6. Double click the image pane
7. Find the image you wish to add using the browser, select it and click Open
8. Click [Save and Close]
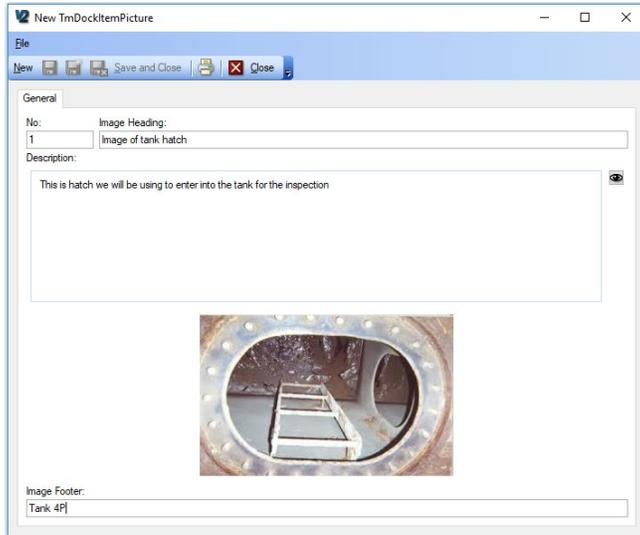
Note: The number of the picture can be edited to change the order in which pictures are printed in the report.

How to create a draft order from a docking item

1. Click [Docking] → [Docking] and select the docking project that you wish to edit.
2. Select the docking item in the structure pane that you wish to create a draft order for.
3. Select the 'Orders' tab
4. Click the [Create Draft] ⭐ button on the toolbar of the middle pane
5. Fill in the necessary details for the order and click save and close

Note: By creating a draft order from the docking module, the order is automatically linked to the docking item you create it from.

How to link an order to a docking project?

To help you keep track of any orders you will be placing for your docking project, you can link any new or existing orders to your docking project.

1. Click [Purchasing] → [Overview]
2. Open the order you want to link to your docking project, by double clicking it.
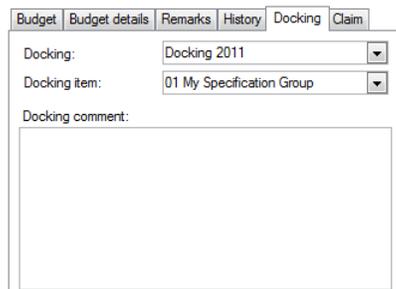
3. Click the "Docking" tab found at the lower right on the "Order head" tab.
4. Select the docking project you wish to link the order to.
5. Select the docking item or group you wish to link it to.

6. Add a comment to the link if required.
7. Save the order.

How to view orders linked to a docking project?

1. Click [Docking] → [Docking]→ Select the docking project you want to view orders for.
2. Click the docking item, group or docking project top level, in the item list.
3. Click the "Orders" tab.
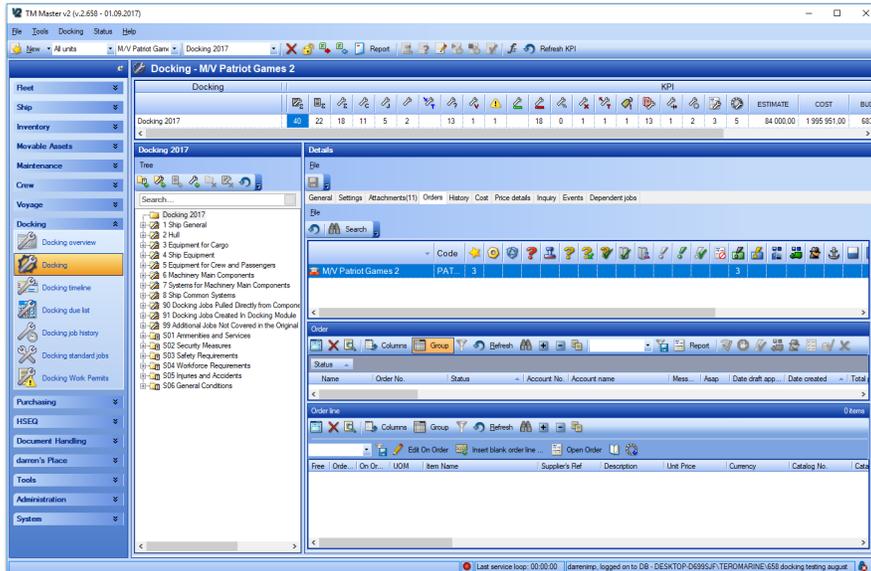
- If you selected an item, only orders linked to that particular item will show in the list of orders.
- If you selected a group, orders linked directly to that group or any of the items within the group will show in the list of orders.
- If you selected the top level, all orders linked to the selected docking project will show.

Please refer to documentation for the purchase order menu for details on the PO view and statuses.

How to add a cost to a docking item or group?

During a dry-docking project lifespan, you will encounter all sorts of expenses. Keeping track of them can be a challenge. TM Docking tries to help you keep track of your expenses or "costs". You can add a cost to any item or group at any time during your docking project.

1. Click [Docking] → [Docking]→ Select the docking project with the item or group you wish to add a cost to.
2. Click the "Cost" tab
3. Click the [Add new cost] 🖳 button found to the left on the toolbar.

4. **Item name** is set based upon the item or group the "cost" is added to.

5. **Date added:** Is set to today's date.

6. **Description:** Enter a description of the cost.

7. **Price:** Enter the cost

8. **Comment:** You can add additional comments to the cost

9. **Added by:** Will be set to the full name registered on the TM Master v2 user adding the cost.

10. **Cost type:** Allows you to categorize your costs, for later review. This can also be 'inherited' from a price detail, if the cost has been created from a price detail.
    *The source for the cost type selector is a code table called "DockingCostType".
    How to add new values to the code tables please refer to "How to add codes?"

11. **Cost Code:** This can be set manually but will also be 'inherited' from either the item is attached to, or the price detail that was used to create it

12. **Account:** This can be set manually but will also be 'inherited' from either the item is attached to, or the price detail that was used to create it

13. Click [Save & Close]

- If you select any of your items, you will find all costs added to that item, on the "Cost" tab.
- If you select a specification or job group, all costs added directly to that group, and all of the costs added to any of the group's items will be listed.
- Finally if you select the top level of your docking project and click the "Cost" tab, all costs either added to a group or item within that project will be listed.

How to add a price detail to a docking item or group?

In TM Docking it is possible to send price inquires to different contractors.
However, it may vary from item to item how you want the yards to specify prices.
In some cases a total cost for a job is sufficient, but in others you might want to be more specific.

In order for you to make sure your inquires are answered as precisely as possible and avoid extra hidden costs once the vessel is in docking, you can include as many price details as you wish for each docking item or group. The procedure is the same regardless if it is a "specification group", "specification item"," job group" or "job item".

1. Click [Docking] → [Docking]→ Select your current docking project.
2. Select the item or group you wish to add a price detail to. (You can't add a price detail to the top level of your docking project, this must be done on an item or group)
3. Click the "Price detail" tab
4. Click the [Add price detail] button on the left in the price details menu.

5. The **Item name** is set depending the item or group the price detail is linked to
6. **Description:** Describe the price detail, "What price are you asking for?" It can be "Total price for job", or as in our example "Aluminium anode price pr. Kg"
7. **Account:** Select an account for the price detail (this may be automatically 'inherited' from the job)
8. **Cost Code:** Select a cost code for the price detail (this may be automatically 'inherited' from the job)
9. **Cost Type:** Select a cost type for the price detail (this will be automatically 'inherited by the cost created from the price detail at a later stage.
10. **Price Type:** Select either 'Normal or 'Optional' (Optional prices will not be included in quote totals until an option has been set as 'Chosen option')
11. **Price Multiplier:** Select either 'Quantity', 'Project Duration' or 'Job Duration' (this controls the basis for the 'Qty field for price)
12. **Estimated Price:** This field can be used to enter an estimation of the price for the price detail before receiving any quotes or entering any budget figures
13. **Price:** Initially you will probably not know the price for the price detail so you would leave this empty.
14. **Qty.:** If you know the total quantity of how many of the item or service you need you can add it and set a "unit of measure". If you are interested to know how much 1 unit of something costs, you can ask for the price pr. Kg or liter etc. Note: If either 'Job Duration' or 'Project Duration' are chosen for the price

multiplier field, the UOM will be automatically set to days and the qty field will be controlled by the appropriate duration fields.

15. **Total:** (Price * Qty.) (or days if daily rate)
16. **Budget price:** You can add a budgeted price to your price detail, this may help you in creating a budget for the docking item.
17. **Budget qty.:** Here you add the budgeted quantity required.
18. **Budget Total :** (Budgeted price * Budgeted quantity)
19. Click [Save & Close]

How to view the added price details?

To see price details added to a specific specification item or job item:

1. Click [Docking] → [Docking]→ Select your current docking project
2. Select the item or group you wish to view price details for.
3. Click the "Price details" tab.
4. All price details added to the selected item will be listed, both budget info and actual prices are listed, and at the bottom the total for each column.

    If you select a specification or job group and then click the "Price details" tab, the price details added directly to that group and all price details for all items in that group will be listed.

    And finally, if you click the top level of your docking project, and click the "Price detail" tab, you will see all price details added to all of your specification items and job items, and groups.

How to add an "event" to a docking item or group?

During a docking project, you may experience a lot of unforeseen events that will delay your project or cause unforeseen costs. A simple event log can help you keep track of these events during and after your project. Reviewing previous projects may help you plan new projects.

1. Click [Docking] → [Docking]→ Select the docking project you want to add the event to.
2. Select the dry-docking item or group the event belongs to
3. Click the "Events" tab
4. Click the [Add docking event] button

5. Enter a name and description for the event.
6. Tick "Active" if you want the event to be included in the "Job short list".
    (The job short list is discussed in "How to export the "job short list"?")

How to add a risk analysis document to a docking item

1. Click [Docking] → [Docking] and select the docking project that you wish to add the risk analysis documents to.
2. Select the docking item in the structure pane that you wish to add risk analysis documents to.
3. Select the 'Risk Analysis' tab
4. Click the [Add a Risk document to this job] button
5. Select which Risk Analysis document you wish to add to the docking item, click [OK]
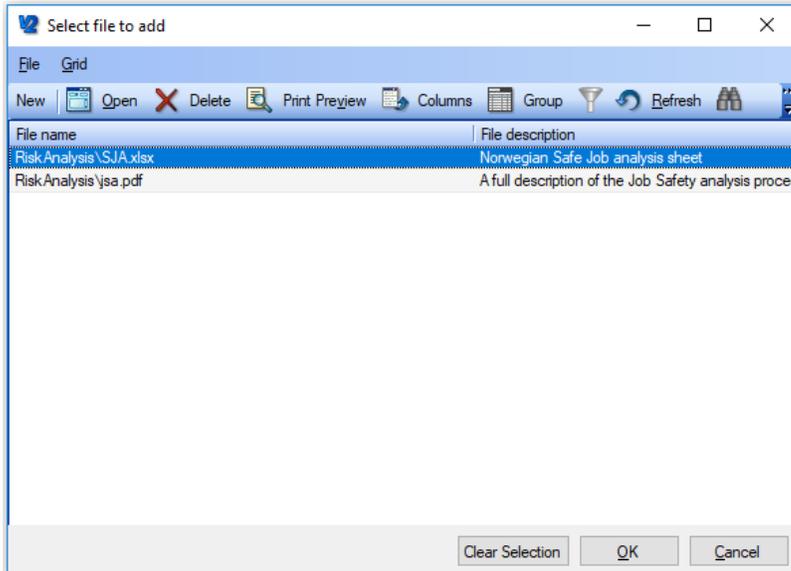
How to add a work permit to a docking item

1. Click [Docking] → [Docking] and select the docking project that you wish to add a work permit to.
2. Select the docking item in the structure pane that you wish to add the work permit to.
3. Select the 'Work Permits' tab
4. Click the [Add Work Permit] button
5. Select which Work permit you wish to add to the docking item, click [OK]
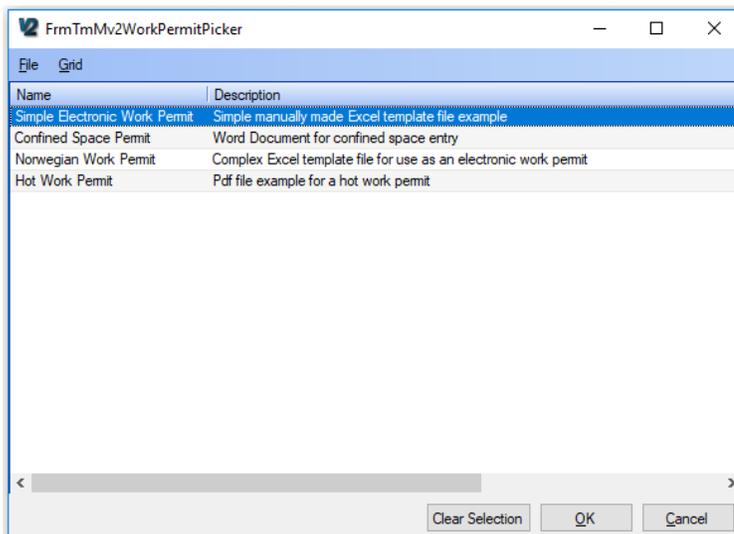
6. Define which crew types are allowed to approve the work permit, click [Save and Close]

How to lock a docking item?

If several people are involved in the creation of the dry-docking specifications, you might want to lock an item, allowing no more changes to the item, and to mark the specification as complete. This can be done by "locking" the item. Here is how it is done.

1. Click [Docking] → [Docking]→ Select the docking project with the item or group you want to lock.
2. Select the item you wish to lock.
3. Click [Lock this docking item] button, found in the menu for the item.
4. For items that have been locked, the button changes to , clicking it again will unlock the item.

Note: You can lock the entire project by clicking the [Lock the docking specifications] button found in the top menu.

Only users that are members of a user group with the "CanLock" user right are allowed to lock and unlock docking items. You can lock/unlock an item at any time. This action is logged in the change history for the item.

How to create a price inquiry for a docking project?

1. Click [Docking] → [Docking]→ Select the docking project you want to send a price inquiry for.
2. Click the top level of the dry-docking item list
3. Click the "Inquiry" tab.

Adding contractors to the inquiry list

4. Click the [Add company] button to the far left in the "Inquiry" menu bar.
5. Select the contractors you wish to add to the inquiry list.
   (Press and hold [CTRL] to select more than one at a time)

Create a price inquiry

6. Select the contractor you wish to create the price inquiry for.
7. Click the [Create a zip-file with docking specifications and all attached files] button.
8. TM Master checks all job items before the export for any jobs missing price details.
   Jobs missing price details will not be included in the "Price inquiry" excel sheet (discussed later).
   If there are jobs that do not have attached price details, you will be asked if you want to add a general price detail to these jobs;
   - If you click [Yes], TM Master V2 will create a price detail called "Total price" for the job.
   - If you click [No], TM Master v2 will not create "Total price" details for your job items
   - If you click [Cancel], you are returned to the program doing nothing.
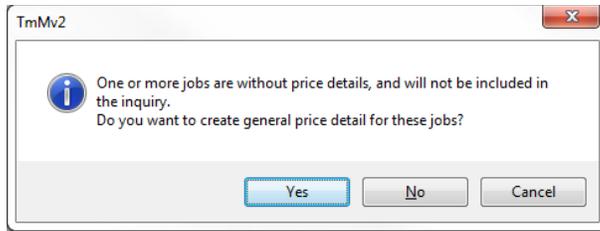
9. You can then select if you want to include all job and specification items and groups (Show all), or you can tick the "Select items to include" to select some of the items.
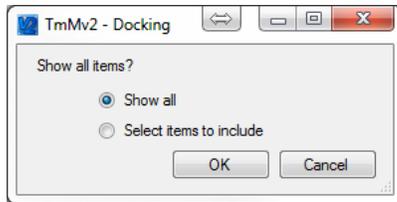
10. Click [OK]

NB! Keep in mind that if you have added one or more price details for the job item, but none of them ask for the "Total price" for the job, TM Master v2 will not be able to detect this. The system will assume that if you have created a price detail for the job item, that you have added the ones you require.

11. TM Master v2 will by default name the zip file in the following manner:
<Contractor name>_<Docking project name>_<Todays date(YYYYMMDD)>.zip
12. Choose a location to save the file and click [Save]
13. You will then be asked what you would like to include in the main report, make your selections and click [OK]
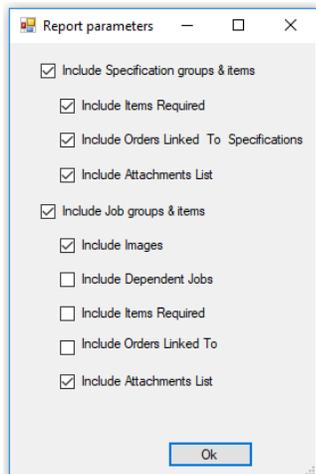
What is in the price inquiry zip file?
The .zip file contains the following files.
- The "Sheets" pdf report containing all job descriptions and specifications (according to the users choices)
- The "Price inquiry" Excel sheet

- And any attached documents. The documents will be placed within folders with the same name as the job they belong to.

14. This file can be sent to the contractor as an attachment to your price inquiry for the contractor. Create a file for each individual contractor. The files within the zip file for each contractor are identical except for the Excel sheet which is contractor specific. It is possible to create only the Excel sheet for each contractor by clicking the [Create inquiry] button.

Note: The main report file (Docking Job Report) can be manually produced at any time during the docking project by clicking the [Reports] button in the top menu, while in the docking module.

How to update price details with quoted prices?

There are two ways of adding the quoted prices to your docking project. You can enter them manually, or if the yard has filled out the Inquiry excel sheet, import them.

How to add quotations manually to your docking project?

1. Click [Docking] → [Docking]→ Select the docking project you want to add quotations to.
2. Click the top level of your docking project
3. Click the "Inquiry" tab

4. Double click the contractor that you wish to update prices for.

5. Click the "Edit in grid" ✏ button.
6. Click beneath the "Item Price" column and enter the quote.
7. The "Comment", "QTY", "UOM", "Adjustment" and "Contractors JobID" columns can also be updated.

Note: Before you can fill out quotation prices manually in the system, an inquiry must be created for the chosen

contractor. Create this inquiry by clicking the [Create Inquiry] 🖥 button and save the excel file. You may then discard the excel file if you do not wish to use it.

How to import quotations to your docking project?

1. Click [Docking] → [Docking]→ Select the docking project you want to add quotations for.
2. Click the top level of your docking project
3. Click the "Inquiry" tab.
4. Click the [Import prices] 🖥 button.
5. Select the "Inquiry" excel sheet with the quoted prices.
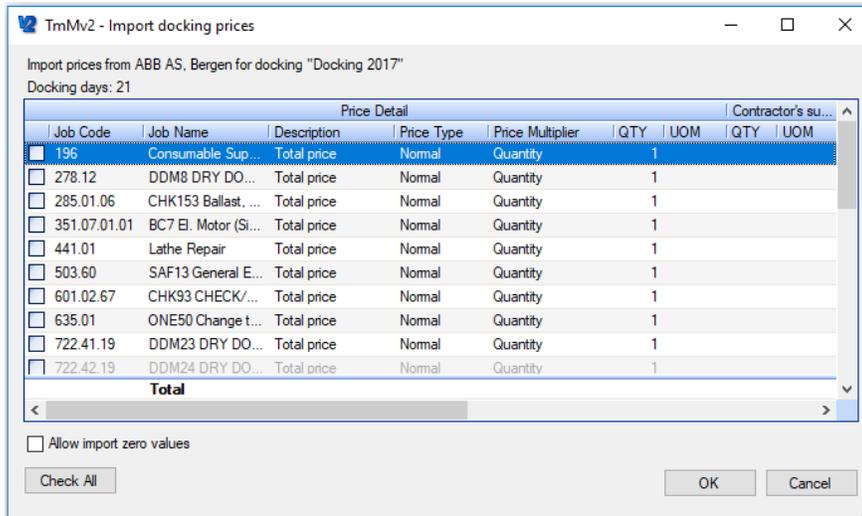
A preview of the quotation to be imported, will appear

6. Decide if you want 'Allow import of zero values' by ticking the check box
7. Tick the inquiry quotes that you want to import, or click the 'Check All' button to select all the quote lines
8. Click [OK] to import the quotations.

Since the price inquiry excel sheets are made to specific to each contractor, TM Master V2 is able to identify which contractor the quotations are from and add them to the correct contractor in TM Master v2.

In the "Inquiry" view with the chosen contractors you should now be able to see the totals for each yard you have imported quotes for.

A copy of the imported excel sheet will be saved as an attachment to the docking project.

How to compare the different contractor quotes?

1. Click [Docking] → [Docking]→ Select your current docking project.
2. Click the top level of your docking project
3. Click the "Inquiry" tab
4. Click the [Show comparison] button in the menu bar.

5. A list of all items will appear, and you will find the different contractor prices as columns.
The lowest price is marked blue, the highest red. The prices are by default shown in the default currency.
The upper pane shows a list of the jobs and specification items and the total value of their quotes. The lower pane shows the specific quotes (for different price details) of the item that is selected in the upper pane

6. If you tick the "show prices in original currency" it will show the prices in the original currency for the contractor.

Note: If a contractor is not listed with any prices in the system currency, but appear once you click the "Show prices in original currency", the system is missing an exchange rate for the contractor currency. The exchange rate is added in the [Administration] → [Currency] module.

Note 2: If a contractor has been cancelled then the quotes will be shown with a line through them. The name of the contractor will also be shown with '(Cancelled)' next to it.

How to select the contractor you will be using?

1. Click [Docking] → [Docking]→ Select the docking project you want to select the contractor for.
2. Click the "Inquiry" tab
3. Right click the contractor, you wish to select as the one to use.
4. Click "Select Contractor"
5. You will be presented with a list of the job and specification items that have not been designated (to a contractor). Select the items you wish to designate to the chosen contractor and Click [OK]

You will be asked if you want to "Update docking prices and durations from the quotation"

6. If you tick the "update docking prices from quotation", you will be asked to enter the current currency exchange. (Only applies if the system base currency is different from Contractor currency). The entered currency will be used to calculate the cost for each individual item in the base(system) currency.

How to change "price details" to "costs"?

Price details: When sending a price request, an excel sheet is produced containing all price details, such as "Price pr. m. Steel pipe", "Hour rate for crane operations", "Total price for job" etc.

Costs: Actual expenses. For example, if you have already purchased materials for a job.
You can add this as a "Cost" for the job. Orders linked to the job will automatically be added as costs once the order is sent, and will be updated when the order is finally paid.

Once you have selected a contractor, based upon the price inquiry, you will be asked if you wish to transfer "Price details" to "Costs" as described in "How to select the contractor you will be using?"

How to export the "job short list"?

It might be in some situations useful to export the jobs and events to an excel sheet, as an agenda or "to do" list for meetings etc. This is possible in TM Master V2 and will allow you to add comments and other smaller adjustments to the jobs and events in it, then later reimport the comments to your project.

1. Click [Docking] → [Docking]→ Select the docking project you want to produce the short list for.

2. Click the [Export job Short list to excel] button, found in the main menu bar.

3.   Save the file in a desired location. The file will by default be named.
    Shortlist_<Project name>_<Todays date (YYYYMMDD).xls

When you open the file in Excel it might look something like this.

4. You can set the job done progress with values between 0-100 % and add a comment.

5. Any active "Events" added to the job item can also be found in the list, and can be updated in the much the same manner, but the progress will only enable you to either close it (make it inactive) by setting it to 100%. Since an event will only be active or inactive (closed).

6. At the bottom of the list you will be able to add new "events". Add the code for the item the event is linked to, then add the event name and a description.

How to import the "job short list"?

1. Click [Docking] → [Docking]→ Select the docking project you want import the short list for.

2. Click the [Import job short list from excel] 📊 button, found in the main menu bar.

3. Select the short list you want to import. (Close the file in Excel before import)
   The following view will appear
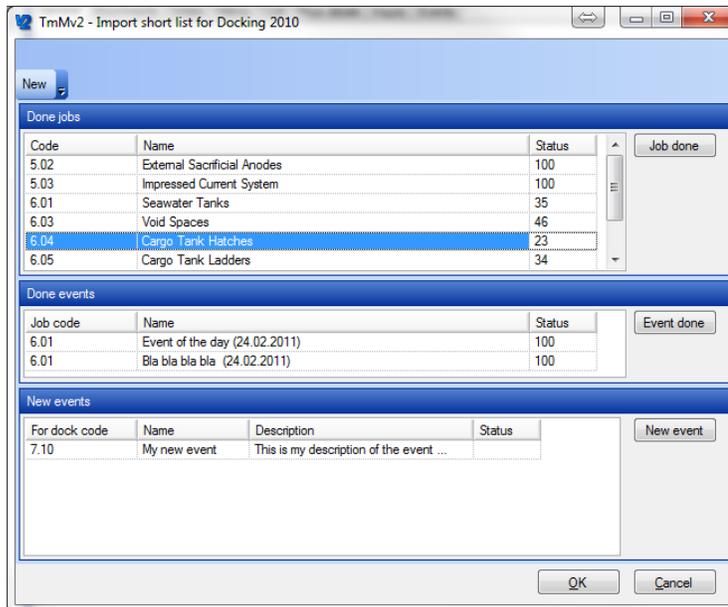
4. If any items are in the "Done jobs" section of the window, you will need to select the ones you want to "import" then click the [Job done] button
   - If any jobs are not set to 100% done the system will update the "progress status" for the job item, and add the update as an event to your "event" tab for the item, using your comment as a description.
   - A job marked as a 100% will set the progress for the job to a 100% and open the job details for the job, and you may sign the job out by clicking the [Sign out job] ✔ Sign out job button.

5. If you have items in the "Done events" section in the middle, you can by selecting on and clicking the [Event done] button, deactivate the event. Deactivated events do not appear in the next short list.

6. If you have items in the "New Events" section, you can add these events to their docking items by selecting an event and clicking the [New event] button. The event is added to the items or groups event list. It is important, that you use the correct job code for any new events added, if not the system will **not** be able to link the event to the correct job.

How to schedule the docking job items?

1. Click [Docking]
2. Select the docking project you wish to schedule jobs for.
3. Click [Docking time line]
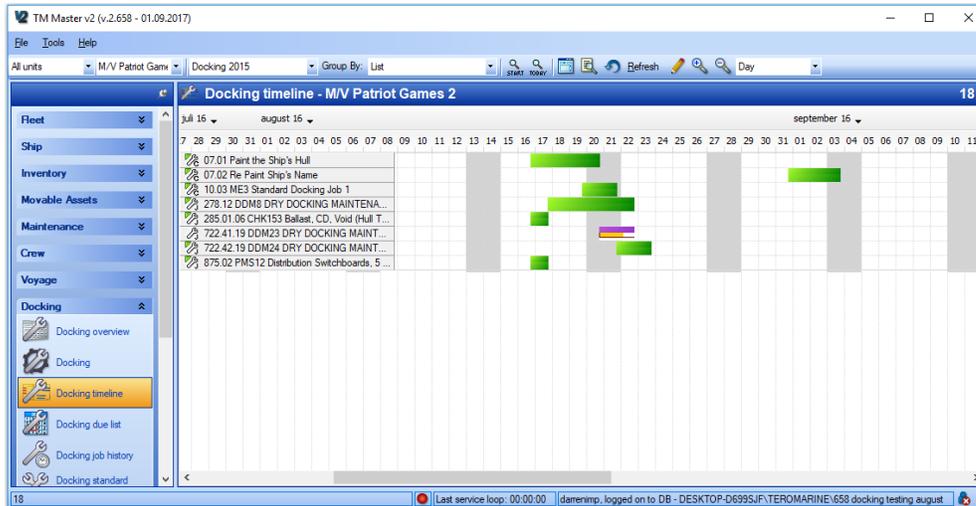
4. To the left, all job items are listed vertically, and the days/weeks/months are represented horizontally.

   You can change the scale for the timeline using the [Zoom in] and [Zoom out] buttons found in the top menu, or using the selector next to them.

5. Click the [Start] button to scroll the timeline to the start of the current docking project

6. Click the [Today] button to scroll to today's date.

7. The yellow vertical line represents today.

8. If you have set a start date for any of your job items, they will appear in the timeline view, and if you have also set a value in duration for it the job items will be represented as a line stretching along the time line. The jobs progress percent is also shown graphically as a percentage of the line. These settings are found at the top left on each job item's detail view.

   Note: The actual start date for a docking project may change several times during the planning of the project. By setting a job item's start date as "Relative to dock date", the job item's start date will be updated, automatically when the entire project date is changed.

9. You can edit the start date and the duration in this time line view, by clicking the [Edit in grid] button.
   a. Click and hold on the center of a job line and drag the job item to a new date.
   b. If you click and hold at either the front or end of the line, you can adjust the duration for the job.
   c. Double clicking a job line, will open the job item, and you can edit its details.
10. The colour on the job lines represents the job items status.
    a. **Blue**   - Planned
    b. **Red**   - Overdue (or not started (no progress % for the job item has been set)

c.   **Purple**   - In progress (a % progress has been set for the item)
d.   **Green**   - Signed out.

Tip: If you have made changes to a job item, but this is not reflected in the time view, click the [Refresh] 🔄 button to update the view.

How to cancel or delete a docking item

1.   Click [Docking] → [Docking] and select the docking project that you wish to cancel or delete an item from.
2.   Select the docking item (job or specification) that you wish to cancel or delete in the structure view
3.   On the structure pane toolbar click the [Cancel/Delete button] 📝
4.   You will be presented with the option to either Cancel or Delete the item (or cancel the action)
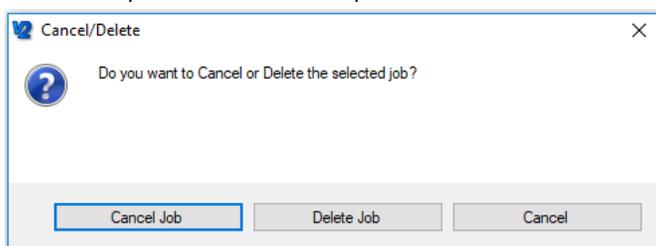
5.   Click the option you require and you will be asked to confirm your choice

Note: If the status of the docking project has reached or passed RFQ, then it will only be possible to Cancel a docking item. This will result in there only being two choices in step 4

Note 2: It is also possible to perform this function from the right click menu in the structure pane, as well as Cancelling the job from the main description toolbar by clicking the [Cancel] Button 📝

How to transfer a docking job

1.   Click [Docking] → [Docking] and select the docking project that you wish to transfer a docking job from.
2.   Select the docking job that you wish to transfer in the structure view
3.   On the toolbar of the detail view, click the [Transfer to another docking] button 🔧
4.   You will be presented a list of docking projects, select the project you wish to transfer the job to and click [OK]
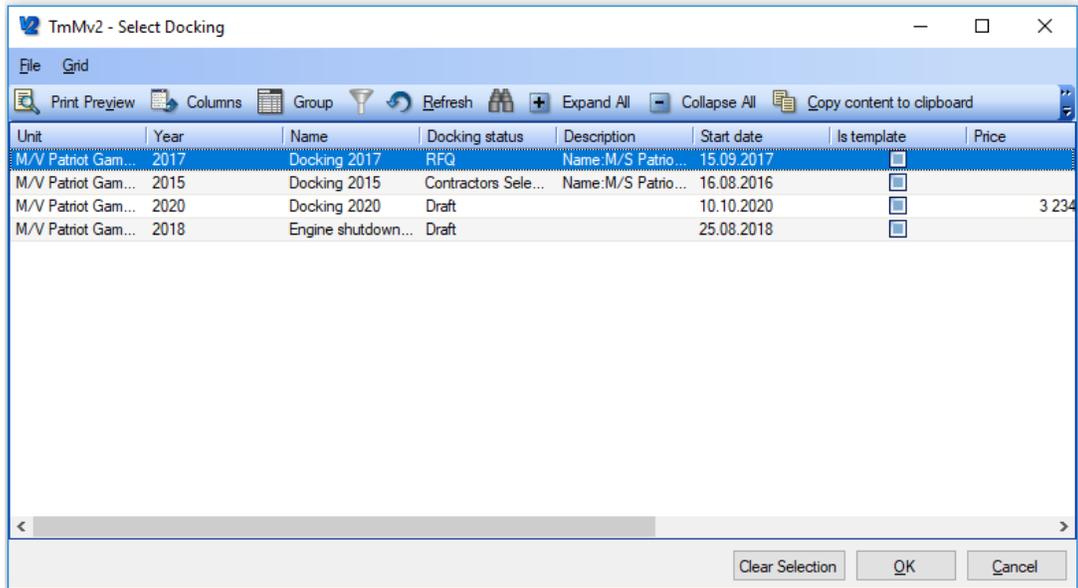
5. Select the Job Group you wish to place the job into and click [OK]
6. Type a reason for transferring the job and click [OK]
7. If the docking job is connected to a component job, you will then be asked if you wish to transfer the component job as well. Click either [Yes] or [No].
8. If you answer yes to transferring the component job, then you will also be asked if the component job should remain in the current job list. Click either [Yes] or [No].
9. If you answer no to the component job remaining in the current job list then you will be presented with the postpone window to assign the component job to a different job list. Choose the alternative job list, type a reason and click [OK].
10. The job will now be marked as transferred both in the structure pane and in the Status field

How to designate a job to crew

1. Click [Docking] → [Docking] and select the docking project that you wish to edit.
2. Select the docking item in the structure pane that you wish to designate to crew.
3. Click the [Designate to Crew] button on the toolbar
4. Confirm that you want to designate the item to crew
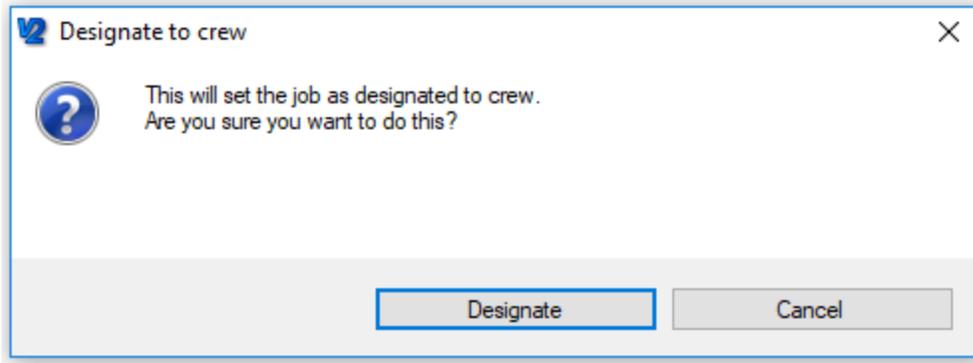
5. The job will then be designated to crew and the status will change
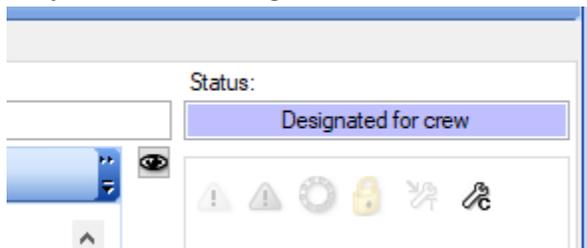
Note: Designating items to crew can also be performed from the Main Docking project 'Inquiry' tab. Several items can be designated to crew in one operation from this view.

How to designate jobs to a contractor from the inquiry comparison view

1. Click [Docking] → [Docking] and select the docking project that you wish to edit.
2. Select the Main Docking group at the top of the structure pane
3. Select the 'Inquiry' tab
4. Click the [Show Price Comparison] ![icon] button on the toolbar

5. Select the jobs in the upper pane that you wish to designate to a contractor
6. Right click in the upper pane and place the mouse pointer over 'Select Contractor', then click on the contractor that you want from the sub menu

7. You will then be asked if you wish to update the prices and job duration based on the quotes from the chosen contractor. Make your choices and then click [Designate]
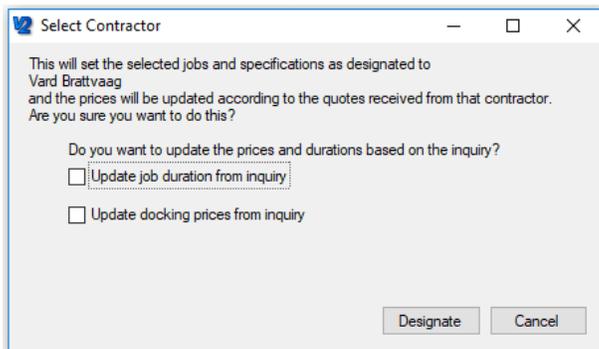
How to delete/cancel a contractor

1. Click [Docking] → [Docking due list] and select the relevant docking project from the drop-down menu on the toolbar
2. Select the Main Docking group at the top of the structure pane
3. Select the inquiry tab
4. Select the contractor in the list
5. Click the [Delete] ✕ button on the toolbar
6. If the selected contractor does not have an inquiry attached to it, then you will be asked to confirm the deletion, click [Yes]
7. If the selected contractor has an inquiry attached, you will not be able to delete it. You will be asked if you want to cancel the contractor, click [Yes]. You will then be asked for a reason. Type a reason and click [OK]

Note: Cancelled contractors can be viewed within the list by clicking the [Show Cancelled] button on the toolbar.

Note 2: Cancelled contractors and their quotes are still shown in the inquiry comparison view, but all the quotes are shown with strikethrough text. The contractor name header in the inquiry comparison view will also show (Cancelled) next to the name.

How to set an optional price detail quote to 'Chosen Option'

1. Click [Docking] → [Docking] and select the docking project that you wish to edit.
2. Select the Main Docking group at the top of the structure pane
3. Select the 'Inquiry' tab
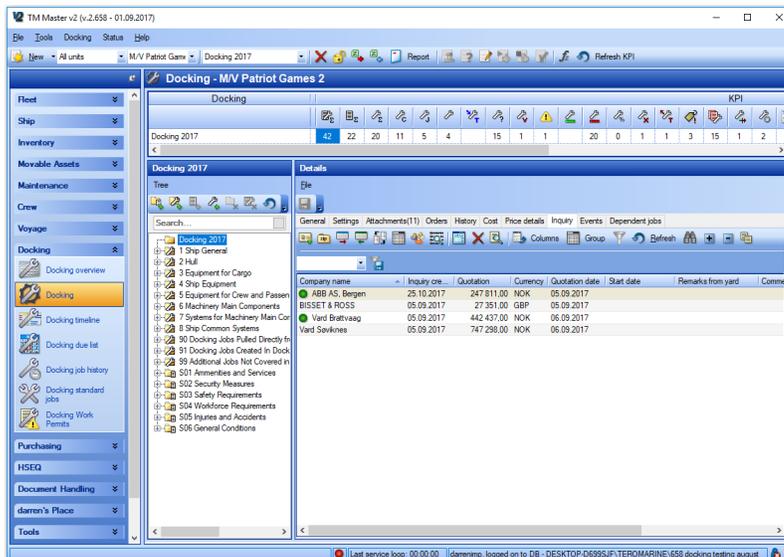
4. Double click on the contractor that you wish to set the chosen option for.
5. In the upper grid pane, select the optional quote that you wish to set as chosen and click the [Select Optional] button on the toolbar
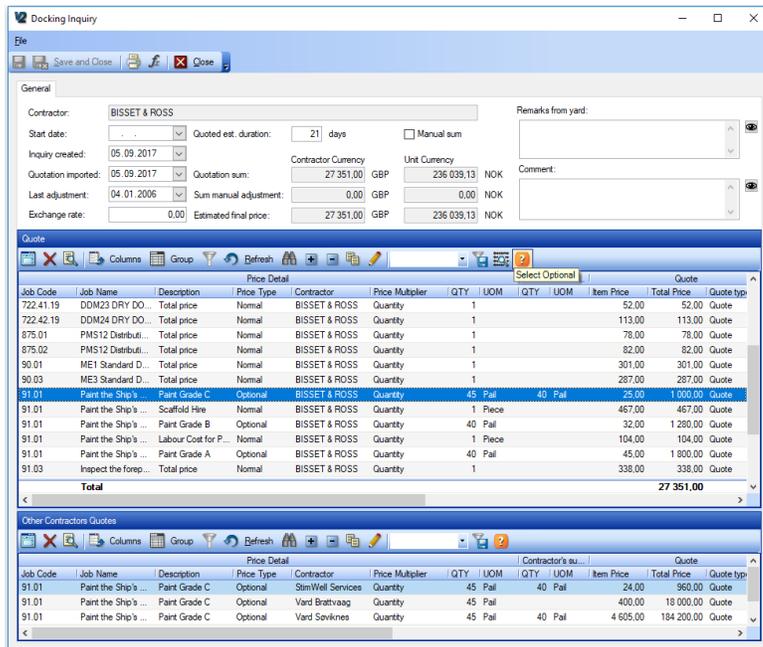
6. The quote will then change to 'Chosen Option' for this contractor and the quote price will be added to the total.

How to add an adjustment to a quote

1. Click [Docking] → [Docking] and select the docking project that you wish to edit.
2. Select the Main Docking group at the top of the structure pane
3. Select the 'Inquiry' tab
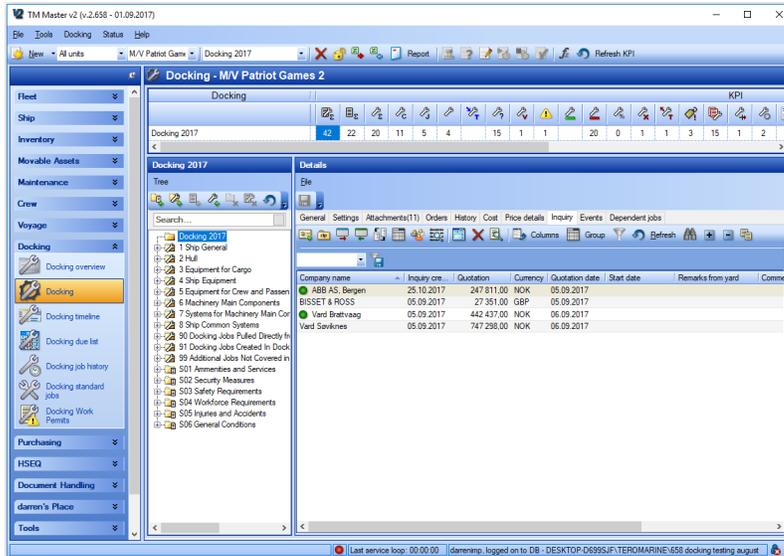
4. Double click on the contractor that you wish to set the add an adjustment for.

5. In the upper grid pane, click the [Edit Grid] ✏ button on the toolbar

6. The 'Amount' column for the adjustment figure will now be coloured blue (meaning you can edit it directly in the grid). Enter the adjustment amount and click the [Edit Grid] ✏ button again to lock the figure.
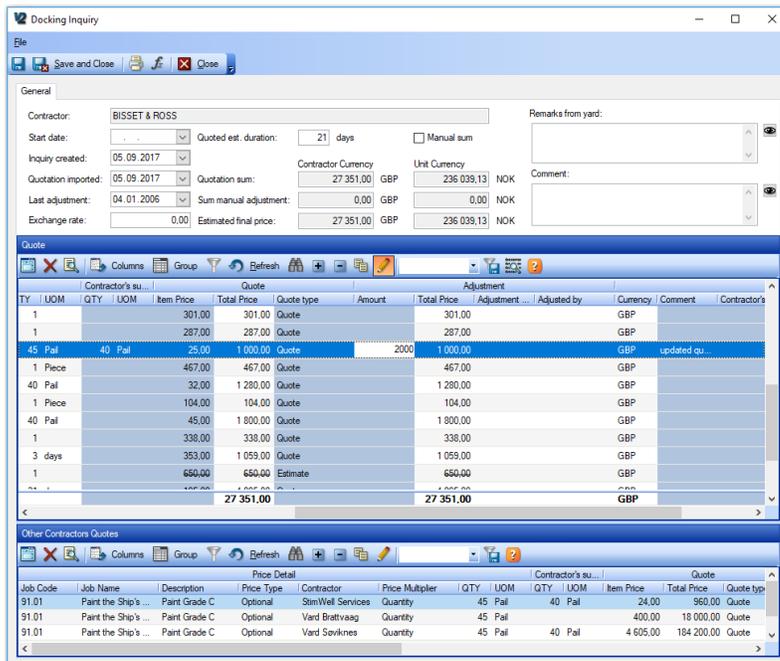
7. Click [Save and Close].

How to set up a default price detail

1. Click [Docking] ➔ [Docking] and select the docking project that you wish to edit.
2. Select the Main Docking group at the top of the structure pane

3. Select the 'Settings' tab
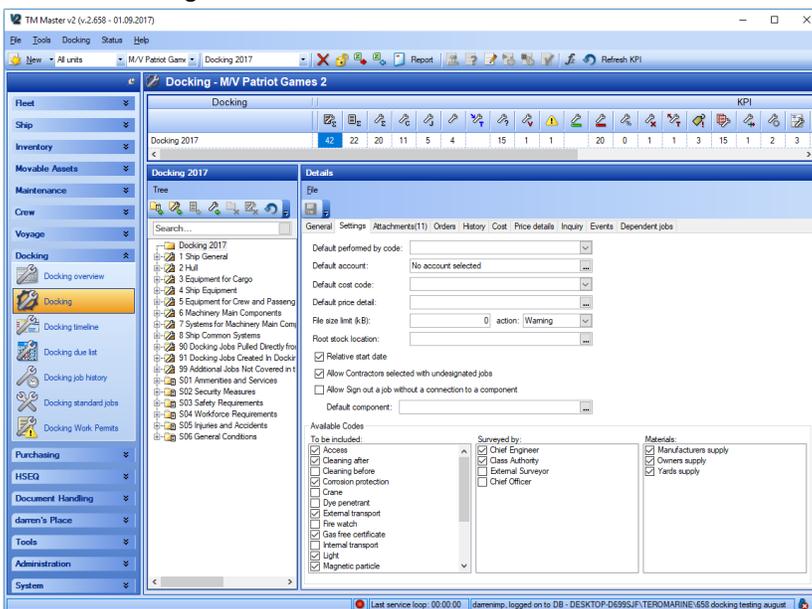
4. Click the [...] button in the 'Default price detail' field
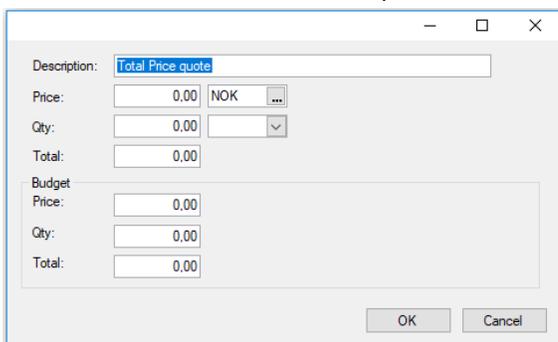
5. Fill in the Description field and any other data you wish, click [OK]
6. Click [OK].

How to set the file size limit for attachments

1. Click [Docking] → [Docking] and select the docking project that you wish to edit.
2. Select the Main Docking group at the top of the structure pane
3. Select the 'Settings' tab
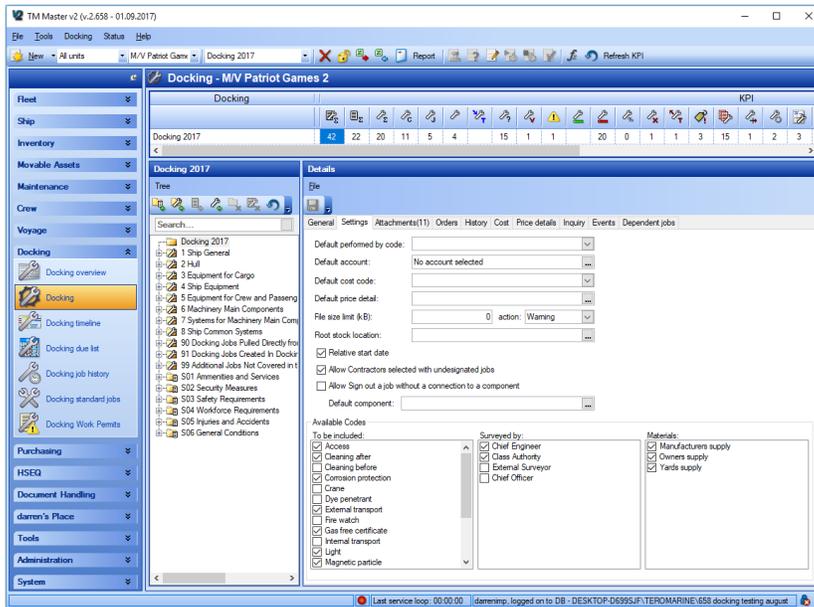
4. Enter a value (kB) for the file size limit
5. Select either Warning or Denied as the action for breaches of the limit
6. Click [Save]

Note: If the action is set as 'Warning' the user will be warned about the attachment being over the file size limit for this particular project, but they will still be able to attach the file. If the action is set as 'Denied' then they will not be able to attach files over the set limit.

How to limit the visible code sets for the docking project

1. Click [Docking] → [Docking] and select the docking project that you wish to edit.
2. Select the Main Docking group at the top of the structure pane
3. Select the 'Settings' tab
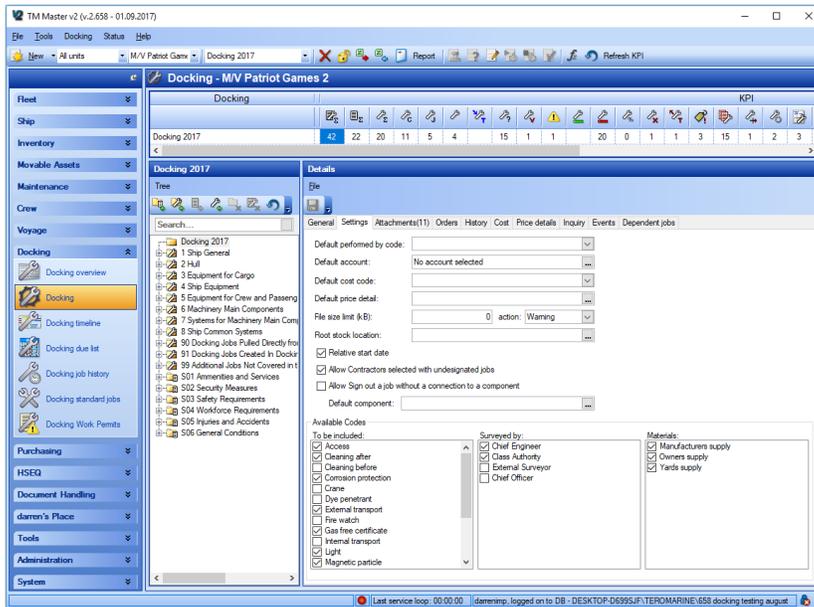
4. In the 'Available Codes' area of the settings, tick the codes that you want to be visible for this particular project, or remove the ticks for those that you do not wish to be visible for this project
5. Click [Save]

How to create a docking template

8. Click [Docking] → [Docking] (If done at the office, make sure correct "unit" is selected in top menu).
9. Click [New] to the far left in the top menu. The following view will appear.
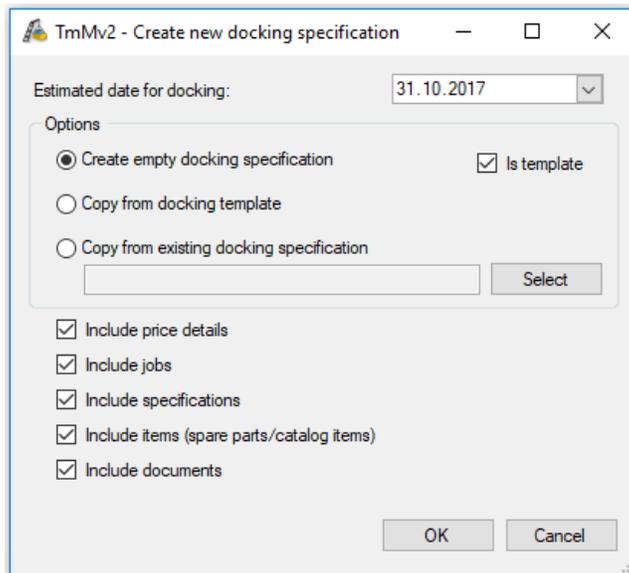
10. Tick the 'is template' check box
11. Select if you want to create an empty template, copy from another template or copy from an existing docking project.
12. If copying from an existing project, tick the options as you see fit.
13. Click [OK]

Note: Templates are 'shared' data and will be replicated throughout the fleet to allow all vessels to utilize them.

How to view two docking projects at the same time

1. Click [Docking] → [Docking Overview].

2. Click on a unit name in the top pane, or any of the status numbers to the right of the unit names
3. In the middle pane, double click on one of the docking projects listed (this will open the project as a separate window)
4. Double click on one of the other projects in the middle pane to open another docking project

How to change the status of a docking project

1. Click [Docking] → [Docking] (If done at the office, make sure correct "unit" is selected in top menu).
2. Select the docking project that you wish to change the status for (toolbar drop down menu)
3. On the toolbar click the appropriate status button to change the status of the project to the next status level

4. These status buttons correspond to the status columns shown in the docking overview module

Unit Name	Code								
						Statuses			
M/V Patriot Games 2	PATG2	2	1	1	1				1
M/V The Full Monty	Monty								
Warehouse 13	13								
M/V Down Periscope	PERI								
Sum:		2	1	1	1				1

Note: Change of status can be achieved by performing certain actions (such as generating an RFQ for a contractor, designating the final job within a project etc.)

Note 2: A detailed description of the different statuses can be found in the Appendices at the end of this manual.

How to check for due docking jobs in the docking due list

1. Click [Docking] → [Docking due list] and select the relevant docking project from the drop-down menu on the toolbar
2. Set the start date to a future date if you wish to see what is going to be due, or leave the date as today if you wish to see what is due and overdue.
3. Set any of the other parameters if you wish to limit the data that is shown
4. Click [Refresh]
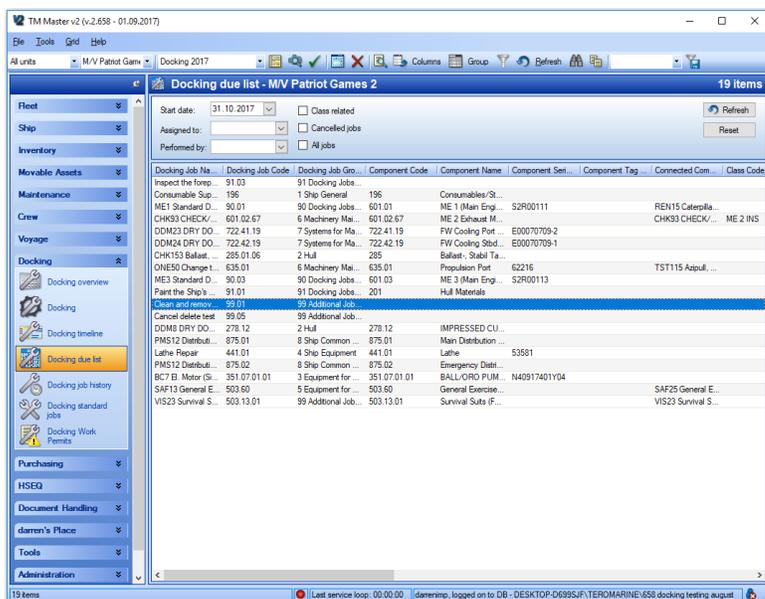
Note: Cancelled Jobs will not be shown in the docking due list unless the 'Cancelled jobs' check box is ticked.

How to view Job history for a docking project

1. Click [Docking] → [Docking job history] and select the relevant docking project from the drop-down menu on the toolbar
2. Adjust the amount of data listed by using the drop-down menu on the toolbar
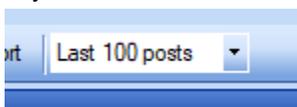
3. Double click on any of the records to view it in more detail

Appendices

The Docking KPI line

From Left to Right:

 Total number of project items (Jobs and Specifications)

The total number of job and specification items currently within the docking project

▤ₑ Total number of spec items

The total number of specification items currently within the docking project

🔧ₑ Total number of jobs in project

The total number of job items currently within the docking project

🔧c Total number of jobs linked to components

The total number of Docking jobs that are linked to components in the inventory

🔧ⱼ Total number of jobs linked to component jobs

The total number of Docking jobs that are linked to component jobs in the maintenance module (via the job list module)

🔧 Total number of jobs not linked

The total number of Docking jobs that are not linked to a component or a component job

🔧ₜ Total number of jobs transferred to this project

The total number of Docking jobs that have been transferred to this docking project from another docking project

🔧? Total number of undesignated jobs

The total number of Docking jobs that are not designated to either crew or a contractor

🔧ᵥ Total number of variation orders

The total number of Docking jobs that are marked as 'Variation Orders'

⚠ Total number of jobs requiring work permits

The total number of Docking jobs that have a work permit attached to them (or the component job that they are linked to has a work permit attached)

🔧 Signed out jobs

The total number of Docking jobs within the project that have been signed out (Completed)

🔧 Jobs not signed out

The total number of Docking jobs within the project that have not been signed out

Progress percent

The progress of the docking project expressed as a percentage. Total docking jobs signed out multiplied by their duration divided by the total jobs in the project multiplied by their duration. This gives a better indication than simply looking at the number of jobs. For example, if you have 10 jobs that last 1 day and 1 job that lasts 10 days, then signing out the job that lasts 10 days will result in a progress of 50%

Cancelled jobs

The total number of Docking jobs within the project that have been cancelled

Jobs transferred out of project

The total number of Docking jobs that have been transferred to another docking project

Jobs missing price details

The total number of Docking jobs that do not have a price detail attached. Jobs without an attached price detail will not be represented in the inquiry excel sheet.

Jobs missing contractor

The total number of Docking jobs within the project that are not designated to a contractor

Jobs exceeding project duration

The total number of Docking jobs within the project that exceed the duration of the main project (= project start date + duration in days)

Jobs needing items without orders

The total number of Docking jobs within the project that have been ticked as 'Need Items', but do not have any orders attached to them.

Number of orders linked to project

The total number of Orders attached to the project

Jobs with items connected

The total number of Docking jobs that have items (spareparts) attached to them.

ESTIMATE - Total project estimated cost

The total sum of all Estimated prices entered on price details for the entire project

COST - Total project cost

The total sum of all costs created for the entire project (costs can be created from 3 sources – manually, automatically from price details and automatically from orders)

BUDGET - Total budget

The total sum of all budget prices entered on price details for the entire project

QUOTE - Total quote

The total sum of all quote prices that have been accepted as part of the process of designating jobs to contractors

VO ESTIMATE - Total estimated price for variation orders

The total sum of all Estimated prices entered on price details for jobs which are marked as 'Variation Orders'

VO COST - Total costs for variation orders.

The total sum of all costs created all jobs marked as 'Variation Orders' (costs can be created from 3 sources – manually, automatically from price details and automatically from orders)

Docking Detail view field list

Code & Name:

Any code system can be utilized, but codes should be unique within a project. A blinking warning symbol beside the code field will be shown if the code has already been used within the same project. The Name for the docking item can be any text you wish

Start Date (& Relative to dock date):

This is used to determine when the job should be started and is used actively in the docking due list. The start date is also utilized by the maintenance due list if a component job has been linked to a docking job (Component jobs postponed to a Job List, will show in the maintenance due list on the date of the Job List unless they are added to a docking project, in which case they will show in the maintenance due list on the start date of the docking job). The relative to dock date check box enables the system to change the start date of specific docking jobs automatically in the event that the main docking start date is changed.

Duration:

This field is to specify the expected duration of the job in days. This figure is then represented graphically in the docking timeline view. The duration can also be utilized as a basis for a price quote when submitting an inquiry to a contractor.

Progress:

This is a percentage figure which can be set manually. If the percentage is greater than 0%, then the graphical timeline bar representing the job will be coloured purple (unless the job has been signed out). The progress percent can also be adjusted using the excel job short list function.

Performed by:

This is a field populated by a code list. Choose from the drop down who you intend the job to be carried out by. The available choices can be edited/added to in the Administration → Codes module.

Assigned to:

This is a field populated by a code list. Choose from the drop down who you intend the job to be supervised by. The available choices can be edited/added to in the Administration → Codes module.

Depends on:

This field shows which job this one is dependent on (which other job should be carried out before this one). If a user attempts to sign out this job before the one that it depends on, they will be warned of the dependency. There is also a warning when changing the start date of a job with dependent jobs – the user will be asked if they want the start date of the dependent jobs to be changed by the same amount.

Contractor:

This field shows which Contractor has been designated for this job/specification item.

Contractor job ID:

This field shows the chosen contractor's job ID. Contractor Job ID's can be applied to quotes before the jobs are designated to the contractor

Item Loc:

This field is for specifying a particular stock location for any spares or catalog items that are to be used in connection with this job for this project.

Account & Cost Code:

These fields are for specifying the relevant account and cost code for the docking project item. Account and cost code can be set at every level of the docking structure and are 'inherited' automatically as the structure is created. Any costs or price details created on the docking item will also inherit the account and cost code from the docking item. Even though these values are inherited, they can still be individually specified

Financial Project:

This field is for specifying which financial project the docking item belongs to. Financial projects are defined and managed in the Purchasing module.

Budgeted Price:

This field shows the current total budgeted price for the docking item. Budgeted prices are specified on the price details attached to the item.

Budget Original:

This field shows the total budgeted price for the docking item at the point where the docking item was designated (to either a contractor or crew)

Quoted Price:

This field shows the total quoted price from the contractor that the job has been designated to.

Sum Cost:

This field shows the total sum of attached costs for the docking item, which are detailed on the cost tab.

Contr. Currency:

This field shows the currency that the chosen contractor operates with.

Quoted Price:

This field shows the total quoted price from the contractor that the job has been designated to, in the currency that the contractor operates with.

Location:

The user can enter a brief description of the location for the docking item.

Created (& Created by):

These fields show when the docking item was created in TM Master V2 and which user created it

Last changed (& Last changed by):

These fields show when the docking item was last changed in TM Master V2 and which user changed it

Description:

This is the main field for describing what needs to be done in connection with this docking item. The description can be formatted using rich text formatting (bold, underline, italics etc.), which will then be reproduced in the docking job report.

Contractor comment:

This field is for entering any relevant comments that have been given by the chosen contractor.

Progress report:

This field is for entering any progress comments that are relevant while the docking item is being carried out.

Component:

This field shows the user which component the docking item is attached to. When a docking item is signed out, the job history will be attached to this component. Components will be automatically attached if a component job is linked to a docking item. Components can be attached by using the button within the field.

Component Job:

This field shows the user which component job the docking item is attached to. Docking Jobs can be created from component jobs from both the due list and the Job list, but they can also be attached to an existing docking job by using the button within the field. If this button is utilized and a component or component job is already attached to the docking job, then only the component jobs from the component will be available.

Details:

This field is for defining any relevant details about the component (or relevant equipment). Clicking the arrow button to the right of this field will copy the data from the attached component into this field. The copied data consists of the Name, Code, Maker, Makers Type, Serial No, Specification and comments

Status:

This fields gives the user an idea of the current state of the docking item. Possible statuses and their colours are listed below;

Undesignated (background colour) – default state for a new docking item

Cancelled (red) – the docking item has been cancelled

Contractor Selected (blue) – the docking item has been designated to a contractor.

Designated for Crew (blue) – the docking item has been designated to crew (to be carried out by your own staff)

Transferred to another (orange) – the docking item has been transferred to another project. This means that it is effectively cancelled in this project.

Completed (green) – the docking item has been signed out as completed.

To be Included:

This field is populated from a code list. It is for specifying equipment or services which should be included as part of the described task. The available choices can be edited/added to in the Administration → Codes module. There is also the possibility to specify which of the options are visible for a specific project in the Settings tab for the project.

To be surveyed by:

This field is populated from a code list. It is for specifying who should be responsible for surveying that the job has been carried out satisfactorily. The available choices can be edited/added to in the Administration → Codes module. There is also the possibility to specify which of the options are visible for a specific project in the Settings tab for the project.

Materials:

This field is populated from a code list. It is for specifying which party is responsible for supplying the materials for the docking item. The available choices can be edited/added to in the Administration →

Codes module. There is also the possibility to specify which of the options are visible for a specific project in the Settings tab for the project.

Which Fields are not locked when a docking item has been locked

The locking feature enables a user with the appropriate user right to lock the dock item to prevent further editing. However, it does not lock all of the fields associated with a dock item. It also does not lock the addition of extra costs, price details, attachments etc. The following are those fields that are <u>not</u> locked.

Duration
Progress
Depends on
Progress report
Contractor Comment

Docking Project Status explanation

In the latest version of docking, a number of statuses have been implemented to provide the user with a quick overview of how many projects are in progress and the stage the projects are at. There are 7 different status levels and they are detailed below. These status levels must be followed in order with the exception of Confirmed, which can be jumped over if an inquiry is created before the project is set to confirmed.

Draft:

This is the initial status and is automatically assigned to all new docking projects

Confirmed:

When it is confirmed by the authorized person, that the docking project will indeed go ahead, the status can be set as 'Confirmed'. This will automatically assign a project number to the project (the Docking project number format needs to be set in system settings)

RFQ:

Request for Quotation status is to indicate that the process of collecting quotes from contractors has started. If a user attempts to generate an inquiry file (either the excel sheet or the full zip file) before the RFQ status has been reached, then they will be asked if they wish to move the status to RFQ. The RFQ status is also used as the point in a project where it is no longer possible to delete job or specification items from the project. From this status on, it is only possible to cancel them.

Contractors Selected:

When all quotes have been collected and the decisions have been made as to which contractors should be utilized for the jobs, the user should set the status to 'Contractors Selected'. Setting this status will run a check through all the jobs in the project to make sure that all jobs have either been designated to contractors or to crew. If there are any jobs which are not yet designated, then the user will be informed that they are not allowed to set 'Contractors Selected' as there are still undesignated jobs. However, there is a setting for each project to allow progress to this status

Started:

When the vessel actually starts the project or arrives at the appropriate location (shipyard, drydock, anchorage etc.) to commence the project, the status should be set to started. When setting this status, the user will be asked to confirm the actual start date and this value will be saved for future reference.

Completed:

When the vessel actually completes the project or departs the appropriate location of the project (shipyard, drydock, anchorage etc.), the status should be set to completed.

Finished:

When everything related to the project has been handled, the status should be set to finished. When setting this status, the system checks all jobs within the project to see if there are any that have not yet been handled. Handled means that jobs have either been signed out, cancelled or transferred to another project. If there are any jobs which are not handled, the user will not be allowed to set the status to Finished. Finished projects will be removed from the project selector drop down on the top toolbar.

Docking Module User rights

Read	User can view the Docking module
Edit	User can makes changes to existingDocking projects
Add	User can add new docking projects
Delete	User can delete docking projects
EditGrid	N/A
CanLock	User can lock/unlock docking jobs and specifications
CanChangeStatus	N/A
CanEditTempalte	User can edit Docking Templates
CanSelectContractor	User Can designate jobs to contractors and transfer prices to the jobs & specifications
CanConfirm	User can set a docking project to the status 'Confrmed'
CanSetRFQ	User can set a docking project to the status 'RFQ'
CreateInquiry	User can create an inquiry zip file and an inquiry excel sheet
CanSetContractorsSelected	User can set a docking project to the Status 'Contractors selected'
SetStarted	User can set a docking project to the Status 'Started'
SetCompleted	User can set a docking project to the Status 'Completed'
SetFinished	User can set a docking project to the Status 'Finished'
DeleteOrCancelJob	User can cancel or delete a docking job or docking job group (Note: deleting jobs is not allowed once a docking project has reached the RFQ status)
DeleteOrCancelSpecification	User can cancel or delete a docking specification or docking specification group (Note: deleting specifications is not allowed once a docking project has reached the RFQ status)
CanDesignateCrew	User can designate docking jobs to be carried out by crew instead of being carried out by contractors
EditComponentJob	User can alter the connection between a docking job and a component job

CanEditSettings	User can edit the docking specific settings
CanTransferJobs	User can use the transfer docking job function to transfer docking jobs from one project to another
CanEditBudget	User can edit all fields associated with the budget figures on price details
CanForceStatusBack	User can force the docking project status back to a previous status
CanEditStandardJobs	User can view and edit docking standard jobs
ImportInquiry	User can import an inquiry spreadsheet

Explanation of the Financial Process

Price Details

The whole financial process starts with the creation of 'Price Details'. Price details are essentially the template for both the budget for a project and the basis of the request for Quotation (or inquiry as we refer to it in the docking module). Users should create a price detail entry for everything that they want to enter a price for. Each job can have as many price details as you wish, or you can just create one for 'Total Price' if you wish. An example of a situation where you may wish to add several price details is if you want the price for a job specified in more detail such as separate prices for materials, labour and hire of tools/equipment. If a job doesn't have a price detail then it will not be possible to enter a price for the job and there will not be a line created for the job in the excel inquiry sheet. In all cases, a price detail has a price multiplier which can have a basis in either project duration, job duration or a specified quantity. So, if you wish to obtain a price per day for something that will last throughout the docking project (such as an electrical supply or water supply) then you should choose 'Project duration as your price multiplier. It is also possible to create optional price details. These are to be used when you wish to obtain prices for different grades/qualities of material or service. Optional prices, by default are not included in price totals. However, within the single inquiry overview it is possible to change optional prices to 'chosen options'. The prices will then be included in the totals. Optional prices that are not chosen will also not be converted to costs when the contractor is chosen.

Create Inquiry

Creating an inquiry will take all price details (unless the user selects otherwise), and create inquiry lines in the database for them, for the relevant contractor. Inquiry lines are records for storing the prices that are offered by the contractor. Creating an inquiry will also create an excel sheet where each line in the excel sheet is a price detail. This is where the contractor can fill in their prices for the various jobs and return the excel sheet to you. Once an excel sheet is returned to you, you can import it and the inquiry

lines will be updated accordingly. However, you can type the prices in manually yourself and adjust them if necessary.

Adjustments

An adjustment can be made to each individual price in an inquiry. It is logged when and who made the adjustment. These are to be used to adjust unrealistic prices, so that you can review what the original offer was as well as what adjustment was applied. Adjustments are included in total prices.

Select Contractor

Selecting a contractor to carry out a job can be seen as acceptance of the price that the contractor has sent to you. When you select the contractor for a job, any inquiry prices for that job will be converted to costs (confirmation of an exchange rate is required in the event that the contractor is using a different currency than the standard for the vessel).

Costs

Costs can be added to a docking project job (or specification) in three ways

1) Added manually to the job/specification by a user
2) Selecting a contractor for the job/specification will convert inquiry prices into costs
3) Any orders attached to docking jobs/specifications, will be represented as a cost for the docking job/specification as soon as they reach the status of 'On Order'

Budget

A budget value can be entered for each individual price detail for a job or specification. This value can be edited at any time, however when a contractor has been chosen for a job/specification the current budget amount is stored as the 'Budget Original' value and it is not possible to edit this amount. Total Budget figures can be seen in the price comparison overview, the Docking overview grid, the KPI bar and the cost comparison overview.

Estimated Price

Estimated price is a field that can be used to enter approximate costs for any price detail you wish, but is mainly intended for 'Variation Order' use. When an unplanned job has to be created (a variation order), it is normally desirable to record an estimated price (given on site by the contractor), so that there is some sort or indication what it might cost. Estimated prices are not used for any process within the Docking module, but they are shown in various overviews.

Price Detail Logic process

```
Price Detail          Create            Excel Sheet
created by user        Inquiry           created and
and filled in                           inquiry lines

Select                                   Inquiry sheet sent
Contractor                               to Contractor

Cost created                             Contractor fills in
based on price                           prices and sends
entered in Price                         sheet back

                      User fills in       Import
                      inquiry             Prices
                      lines manually

                                         User chooses
                                         which prices to
                                         import and clicks

                                         Inquiry lines
                                         updated

                                         User adjusts and
                                         compares prices
                                         as required

Costs created         Select            User decides
based on inquiry      Contractor        which
price                                   contractor(s) to
```

Updating Prices

There are a number of different ways to update inquiry prices and cost prices within the docking module. It is our recommendation that your organization decides which way best suits them and stick to the one method. As can be seen from the previous diagram, inquiry prices can be entered in one of 3 main ways (although two methods actually allow two variations). Updating prices may be necessary for a number of reasons (change of scope of work, negotiated discounts, last minute changes from contractors etc.)

Entering/Updating the inquiry prices

1) Produce the excel sheet, enter the prices (either yourself or the contractor) and re-import the sheet. The sheet can be imported as many times as you wish and is saved as an attachment every time it is imported)
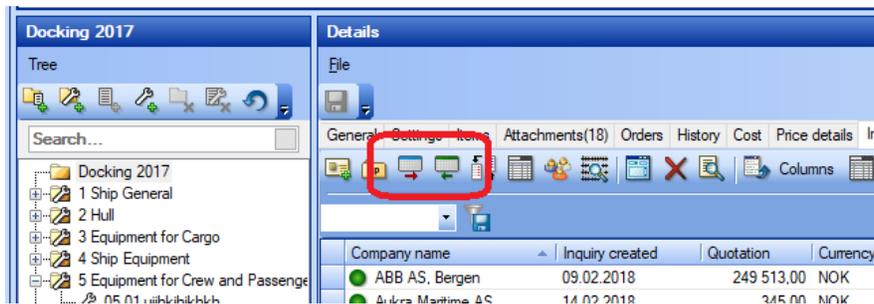
2) i) Update existing prices using the edit in grid function
   ii) Enter new inquiry prices directly in the grid (by clicking the 'show all price details' button)
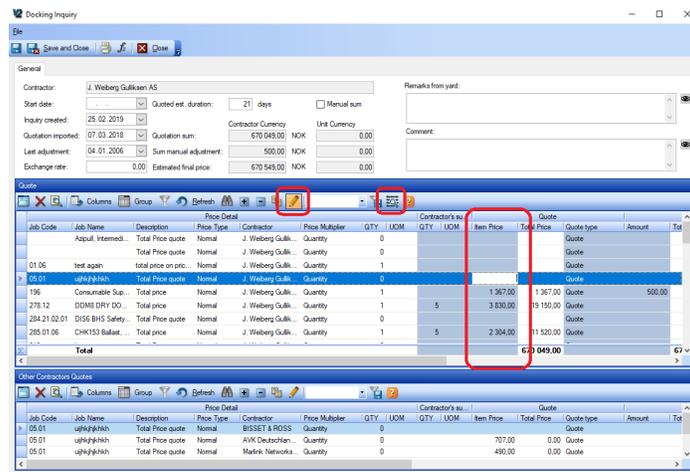
3) i) Enter prices directly onto the price details, detail form (choosing a contractor without inquiry prices will use this price)
ii) Enter prices directly onto the price details using edit in grid
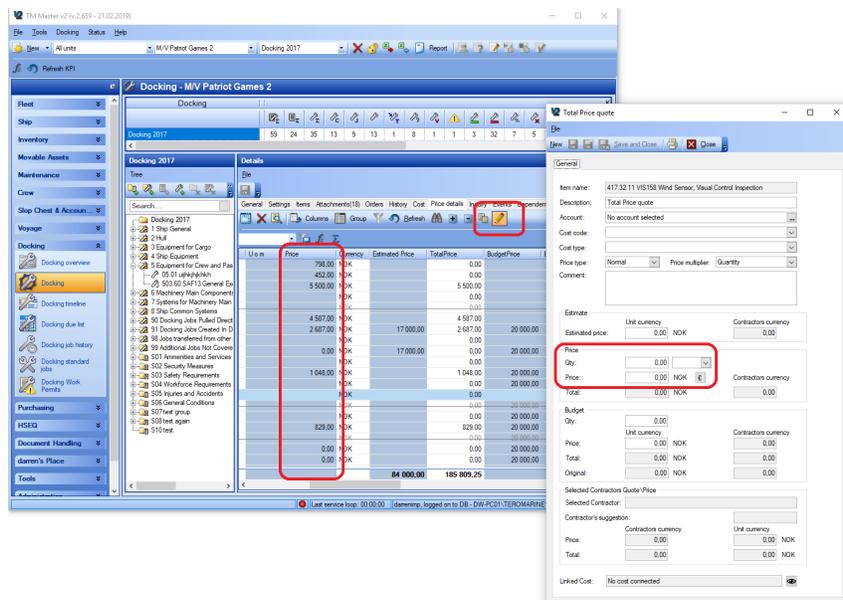

Updating Costs

1) Open the cost detail view and update the price directly
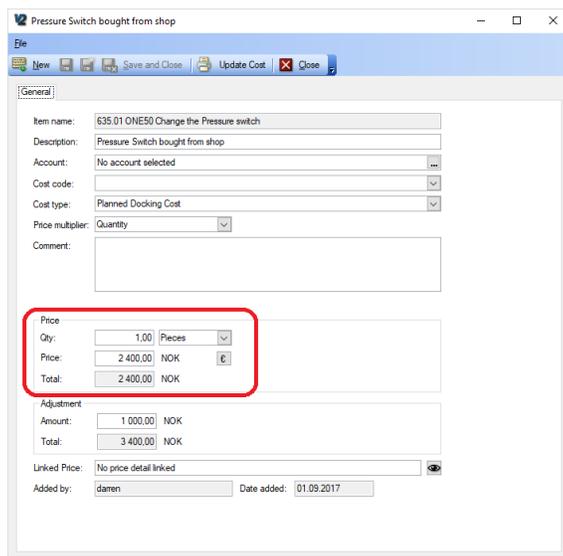
2) Update the costs using the ship's currency, directly in the cost grid

3) Update the costs directly in the contractor's currency directly in the cost grid

4) Update the inquiry price and re-select the contractor for the job(s)
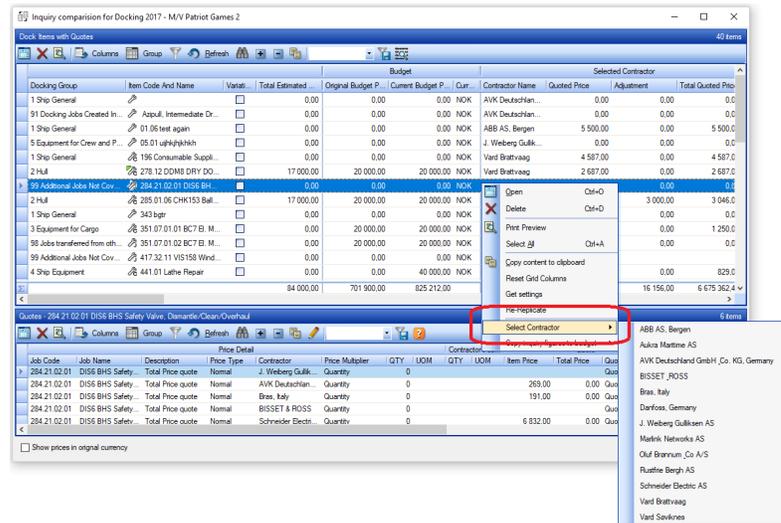
5) Update the inquiry price and click the 'Update cost' button in the cost detail view
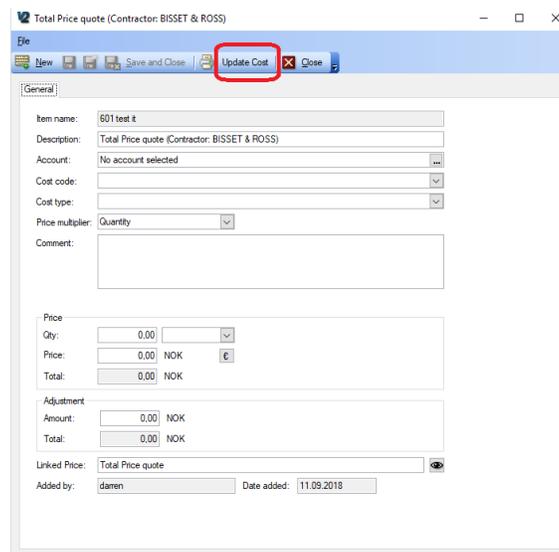
The exception to these methods is that the costs associated with orders cannot be edited within the docking module. Any adjustment must be carried out on the actual order that is connected.