

Movable Assets

Contents

- Movable Assets 1
 - How does the Movable Asset module work? 2
 - How to configure TM Master V2 to start using the «movable assets» module? 3
 - Defining “Movable component category” 3
 - Add unit’s to one or more movable component category. 3
 - How to make a component movable? 4
 - How to make a stock location movable? 5
 - Keep track of all your movable assets in your fleet 6
 -  Movable components 6
 -  Movable Stock Locations 6
 -  Assets in Transit 7
 -  Component Movements 8
 - How to create a “pro forma invoice” and initialize a component move 8
 - How to initialize a stock location transfer (item transferal) 9
 - Details for the Pro forma Invoice form. 9
 - Pro forma Invoice functions 13
 - Export & import of files and documents linked to a movable asset. 15
 - Disable and enable jobs for components on a pro forma invoice shipping list. 15
 -  Due Jobs in Transit 16

How does the Movable Asset module work?

The Movable Asset module, will allow you to move components and spare parts, between units. Component relevant information (Jobs, History, Spare parts, Running hours, documents), will be available to the receiving unit, once it has been received onboard. A Transfer document (Pro forma invoice) can also be created.

Once a component has been received on a vessel, it will behave as any other component onboard, adding its jobs to the vessels due list, and its job history to the vessel's job history. Changes made to the component in TM Master V2 (Job signed out, changes made to its attributes or spare part list etc.) are as for all other components replicated back to the office system.

The difference with the movable components in regards to system behavior is that once the office system receives updates to it, these changes are then also replicated to the other vessels in your fleet, (those which are configured to be able to receive the appropriate movable component data). This way when a movable component is actually transferred between units, all information belonging to the component is already onboard the receiving unit, and only needs to be "Activated" in that system. The alternative to this solution is to replicate all the information at the time of the actual transfer. This would result in one big replication file that might cause problems for vessels with lower bandwidth.

Depending on your fleet size and diversity, not all vessels will be eligible to receive the movable components. (Tanker vessels will not receive Seismic equipment etc.). To avoid unnecessary replication to vessels that will never receive the component, you can categorize movable components and decide which units receive which categories. Any updates made to a movable component of one category are only distributed to units designated to receive that category. A Unit can receive none, one or several categories. A component can only be added to one of the categories.

How to configure TM Master V2 to start using the «movable assets» module?

Some configurations are required to start using the “Movable assets” module. All configurations should be made in the office installation.

Defining “Movable component category”

To add your “movable component categories” to the system, do the following.

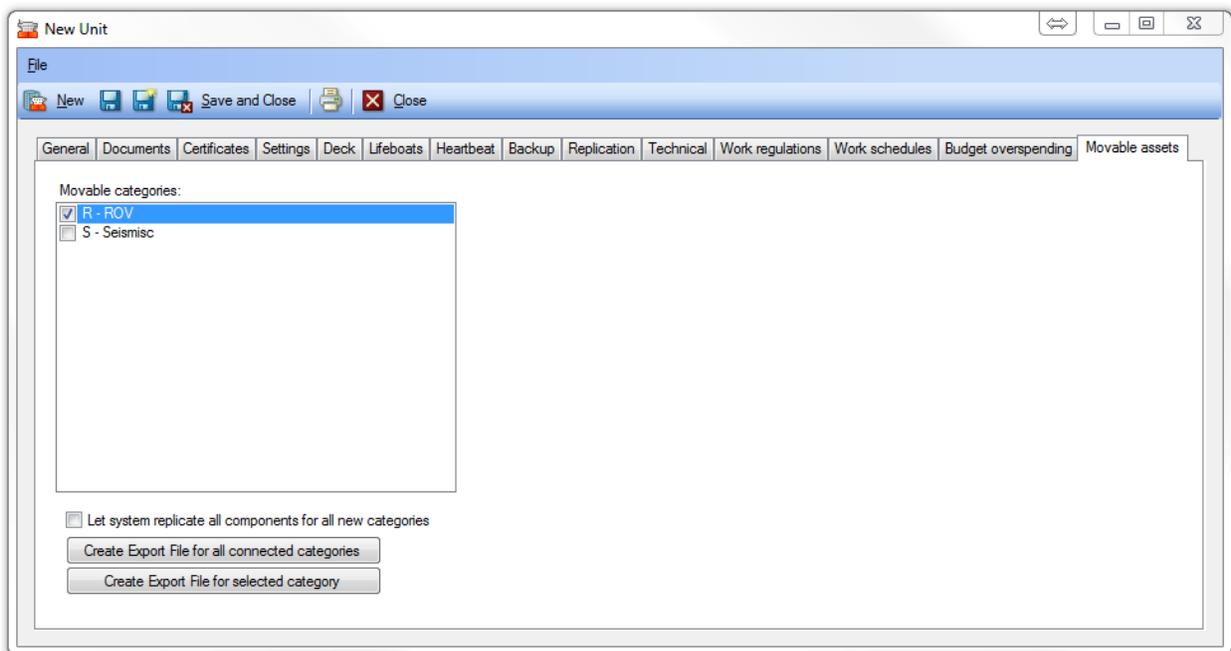
1. Start and log on to TM Master V2 at the office using an admin enabled user.
2. Click [Administration] → [Codes] → Select the “Movable asset category” code table.
3. Click [New]
4. Enter your Category name, and a code value.
5. Click [OK]

Typical values would be “ROV” or “Seismic Equipment”. You can create as many movable component categories as you require.

Add unit's to one or more movable component category.

To create a movable component on any of your units, you will first need to add the unit to one of your movable component categories. Keep in mind that when a unit has been added to a movable component category, the unit will receive updates for all components within that category.

1. Start and log on to TM Master V2 at the office using an account with the correct user rights (ref chapter movable chapter user rights).
2. Click [Fleet] → [Units] → Double click the unit in question. → “Movable Assets” tab.



The movable asset tab

3. Select (tick) the movable component categories that you wish the unit to be able to receive .
A Unit can receive more than one category at the same time.

All updates made to the components within the selected category as well as new components added to the category will now be replicated to the unit. Component data already in the database at the time a unit is added to the movable component category is not automatically transferred \ replicated to the unit. The amount of data related to a movable component category can be very high. To avoid clogging your replication with large replication files, you have 2 options to transfer the required initial data.

- a) Transfer all initial data by normal replication files.
By ticking the “Let the system replicate all components for a new categories”, the next service loop will export all data related to the selected movable component category to a replication file in the COMM folder.
- b) Manually export and import the component group data.
By clicking the **[Create Export file for all connected categories]** button, all the data is exported to an XML file, which can be manually imported onboard. This button will export data for ALL selected categories, if more than one category is ticked. The **[Create export file for selected category]** only exports data for the selected group. (Marked by the blue selection line)

How to make a component movable?

To be able to transfer a component from one unit to another, you have to add the component to one of your Movable component categories. Here is how you do it.

1. Start and log on to TM Master V2 at the office using an account with the correct user rights (ref chapter movable chapter user rights).
2. Click [Inventory] → [Components] → Double click the component you wish to turn into a Movable component.
3. Click the “Specification” tab → Click the “Movable Component” tab, found in the bottom of the “specification” form. (ref image)
4. Tick the “Movable asset” check box.
5. Select the “movable component category” for this component.
6. Click [Save].
7. If the component you configured as movable has any sub components you will be asked to confirm that they too should be made movable. All sub components of the component will be set as “movable”.

This is the “Movable Asset” tab found on the Component specification form.

How to make a stock location movable?

This manual will refer to transferal of “items”. An “item” in this regard can be a “Spare part” or a “Catalog item” / “Consumable item”. In order to move an item, it must be placed in a location configured to be movable. Now this can appear a strange way of doing things, but if you consider the box or container used to send an item as a location it makes more sense. When items are received, you can transfer them to your ordinary stock locations, and then delete the “movable” one if you do not need it any more.

Here is how you create a movable location.

1. Click [Inventory] → [Stock]
2. Create a new stock location by clicking the  [Add root node to tree] .
3. Enter a name for the location. (.i.e. Shipping Container 1)
4. Right click the location and select “Open”
5. Tick the “Movable asset” check box.
6. Click [Save & Close]
7. The location is now movable and can now be found in the module [Movable Assets] → [Movable stock locations].

Adding items to a movable stock location is done as for any other stock location. You can drag and drop items from one location to another or you can open a specific item and add it to the stock location using the stock location selector.

Keep track of all your movable assets in your fleet.

Having assets that will be moved around your fleet and keeping track of everything can be a challenging task. TM Master v2 will allow you to move your assets and be in complete control of where they are located, at any given time. TM Master v2 has 4 views that will do this for you, they are as follows.



Movable components

All components configured to be movable, are listed in the [Movable Assets] → [Movable Components] module. The units with movable components and the movable components themselves are listed in the tree view on the left hand side. Selecting a movable component in the tree view, will list all sub components in the grid view on the right hand side. A movable component will remain linked to the sending unit until the component is received onboard the receiving vessel.

The users onboard a vessel, can also view the movable components on all vessels. This applies only to the components that are in the same “Movable component category” or categories that the unit is enabled for.

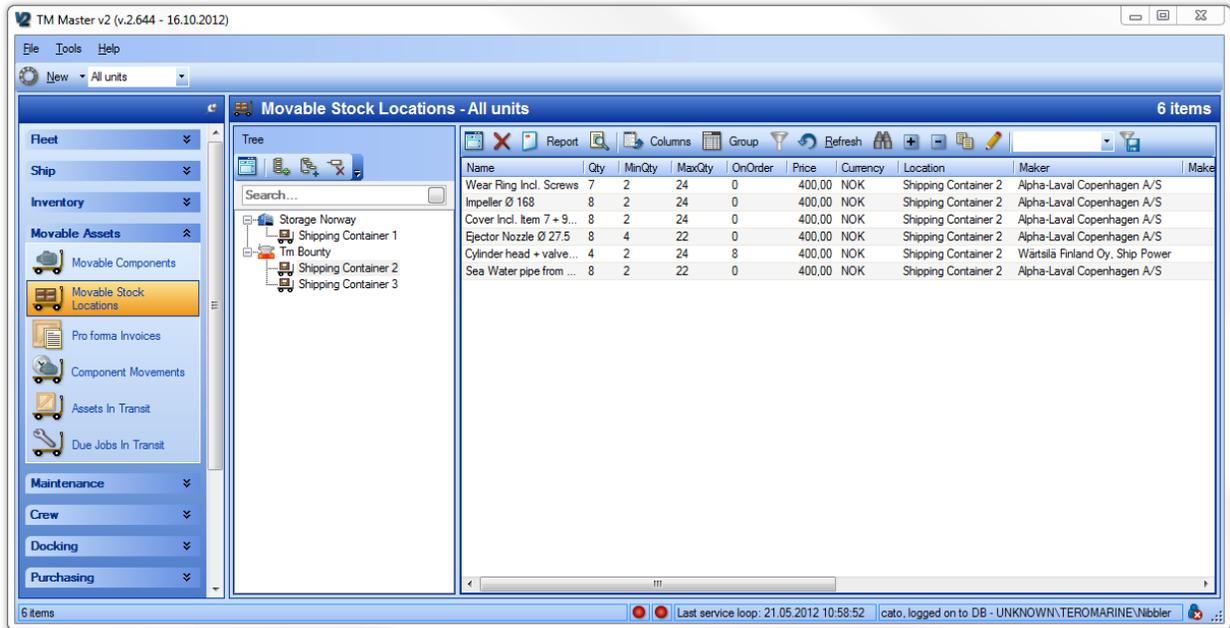
Code	Location	Unit	Name	SerialNo	Movable cat...	Movable status
482.01	ORI	ROV XS-01		1234567890	ROV	ActiveOnboard
482.01.130	ORI	TCU			ROV	ActiveOnboard
482.01.330	ORI	AUX CARDEV			ROV	ActiveOnboard
482.01.450	ORI	LIGHTS			ROV	ActiveOnboard
482.01.210	ORI	MAIN FILTER R...			ROV	ActiveOnboard
482.01.150	ORI	THRUSTERS			ROV	ActiveOnboard
482.01.090	ORI	MAIN PUMP			ROV	ActiveOnboard
482.01.390	ORI	ROV TELEMET...			ROV	ActiveOnboard
482.01.050	ORI	BOUANCY			ROV	ActiveOnboard
482.01.610	ORI	FLASHER			ROV	ActiveOnboard
482.01.250	ORI	MAIN RESERVO...			ROV	ActiveOnboard
482.01.650	ORI	SONAR			ROV	ActiveOnboard
482.01.200	ORI	MAIN FILTER HP			ROV	ActiveOnboard
482.01.030	ORI	LIFT POINT			ROV	ActiveOnboard
482.01.290	ORI	AUX-PUMP			ROV	ActiveOnboard

The “Movable Components” overview shows the movable components listed under the “unit” where the component is currently linked.



Movable Stock Locations

All locations configured to be movable, are listed in the [Movable Assets] → [Movable stock locations] module. The units with movable locations and the movable locations themselves are listed in the tree view on the left hand side. Selecting a movable location in the tree view, will list all items in this location in the grid view on the right hand side. A movable stock location will remain linked to the sending unit until the location is received onboard the receiving vessel.

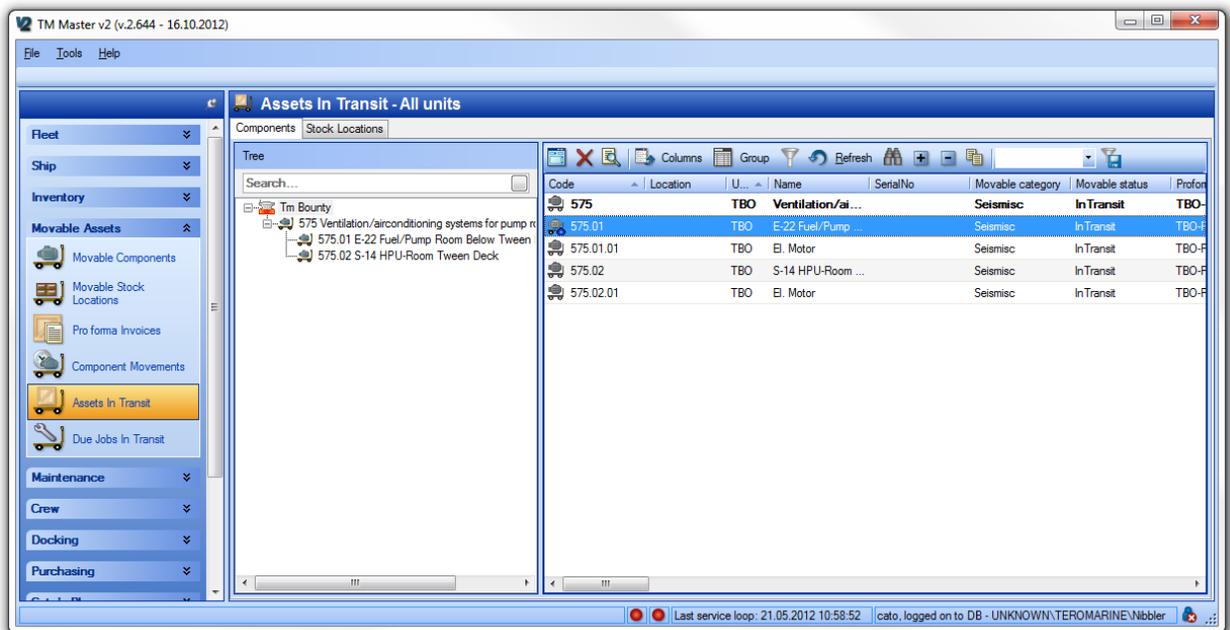


The “Movable Stock Location” overview shows the movable stock location listed under the “unit” where the location is currently linked.



Assets in Transit

The [Assets in Transit] module gives you an overview of the assets currently in transit. Components and stock locations are available on the different tabs found on top of the tree view.

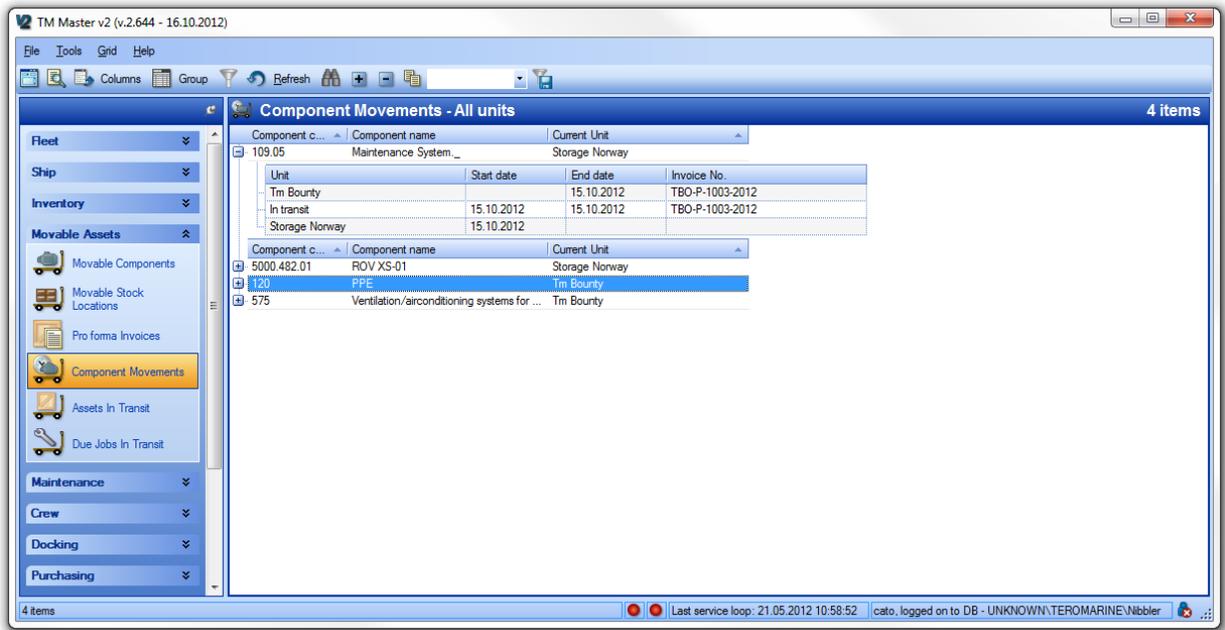


The “Asset in Transit” overview shows the movable components and stock locations.



Component Movements

The [Component Movements] module will keep track of each movable component's transfer history. This view will easily identify which unit who used the component last and when this was. Clicking the [+] symbol in front of the component listed in this view will reveal its transfer history.

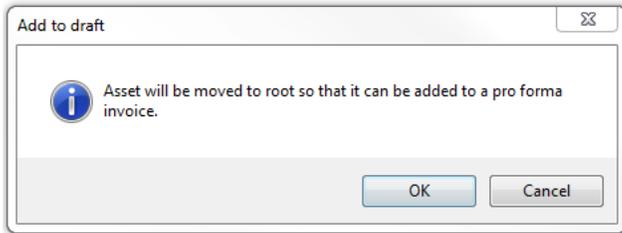


The “Component movement” overview shows the movable components and its transfer history.

How to create a “pro forma invoice” and initialize a component move

This is a detailed description of the procedure required to create a pro forma invoice and initialize the move of a component from one unit to another unit. This description assumes that all the required configurations, as described earlier in this document, have been done. It is possible to initiate a component move from the office or any unit within the fleet that can ‘see’ the component . However, only the unit that currently owns the component or the office can approve the pro forma invoice.

1. Click [Movable Assets] → [Movable Components]
2. Locate the component you wish to transfer from one unit to another, in the “Tree” view.
3. Right click the component and select “Add to invoice..”, select an existing one or create a new invoice.
4. If the movable component is not a “Root” component in the component structure, you will be asked to confirm that you accept that it will be moved to the “root” level.



5. If you created a “New Invoice”, enter a name for the invoice, the name can be used to identify the “Pro forma Invoice” later on.
6. You are then asked to confirm the newly added movable component.
This dialog also allows you to:
[Save] which confirms the addition of the new component.
[Save and Open] which confirms addition and opens the pro forma Invoice form.
[Cancel] which will cancel the addition of the component.
7. In addition to clicking [Save and Open] in step 6 - To review any existing “Pro forma Invoices” and/or to process them further at any time in the future, Click [Movable Assets] → [Pro forma Invoices].
8. To open the “pro forma invoice” double click it.
9. Fill in the “Pro forma Invoice” details you have available.

How to initialize a stock location transfer (item transferal)

1. Click [Movable assets] → [Movable Stock Locations] → Select the unit you added the stock location for.
2. Right click the stock location and select “Add to invoice..” and create a new invoice or select an existing one. You can mix movable components and stock locations on the same invoice.
3. Fill in the “Pro forma Invoice” details you have available.

Details for the Pro forma Invoice form.

The pro forma invoice form allows you to add details to your transfer, these details can be printed and used as a transport document. Even if you do not need to print any transport documents for your transfers, you will need to fill in at least some of the details found in this in order to complete a transfer of one or more components.

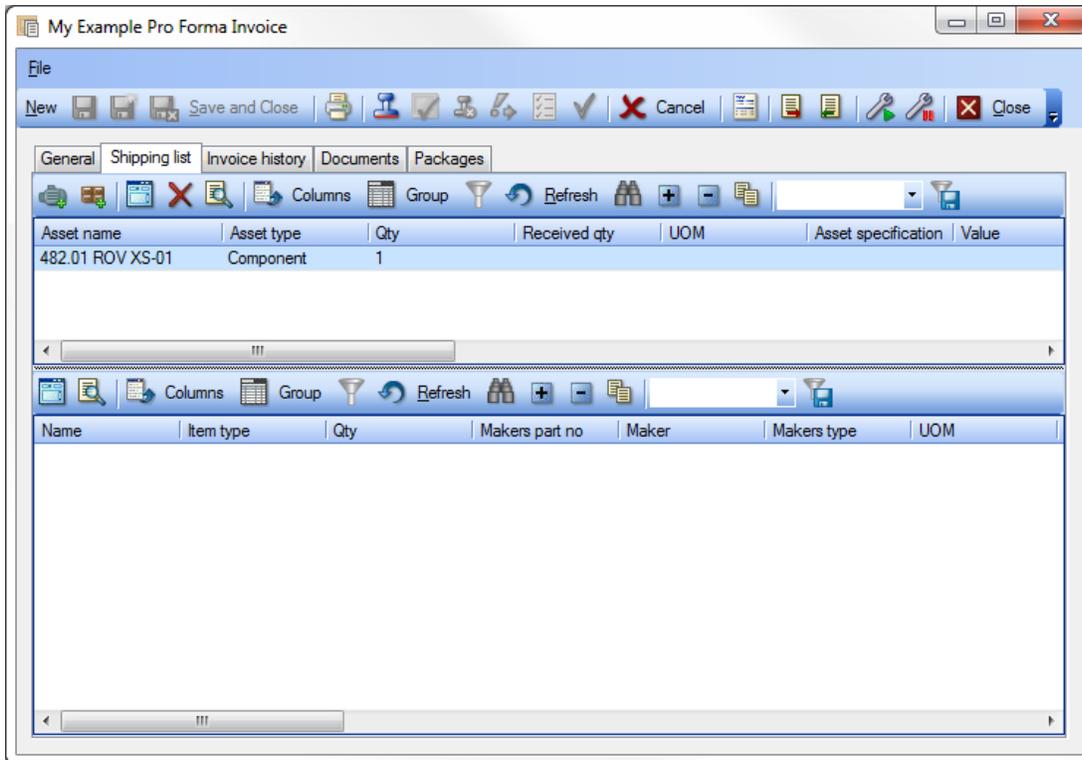
The details available in this pro forma invoice form are as follows:

The "General" tab found on the Pro forma Invoice form.

4. The "General" tab fields

- a. **Name:** The user given name/title for the "Pro forma invoice"
- b. **Shipment status:** The current status for the "Pro forma Invoice" the following statuses are possible (New, Approved, Packed, In Transit, Partly Received, Completely Received and Finished.) More details on the statuses later in this document.
- c. **Create by:** The "user name" of the user who initially created the Pro forma invoice.
- d. **Pro forma Invoice no:** Once the pro forma or transfer has been approved the pro forma invoice number is set, and shown here.
- e. **Date sent:** Will be set to the current date when the [Send package] is clicked.
- f. **Date received:** Will be set when the "Set as received" is clicked.
- g. **No of packages:** Is the total sum of "Packages" found on the "Packages" tab
(For more details on the packages tab please refer to the chapter "Packages")
- h. **Total weight:** If packages have been registered on the "Packages" tab and these packages have been given a weight value. The total sum of all packages is shown in this field. By ticking the "Manual" check box you may override the sum by typing a weight value.
- i. **Total Volume:** You can register height, width and depth for each package, registered on the "packages" tab. The total volume of all packages is shown in this field. By ticking the "Manual" check box you can override the sum by typing a volume value.

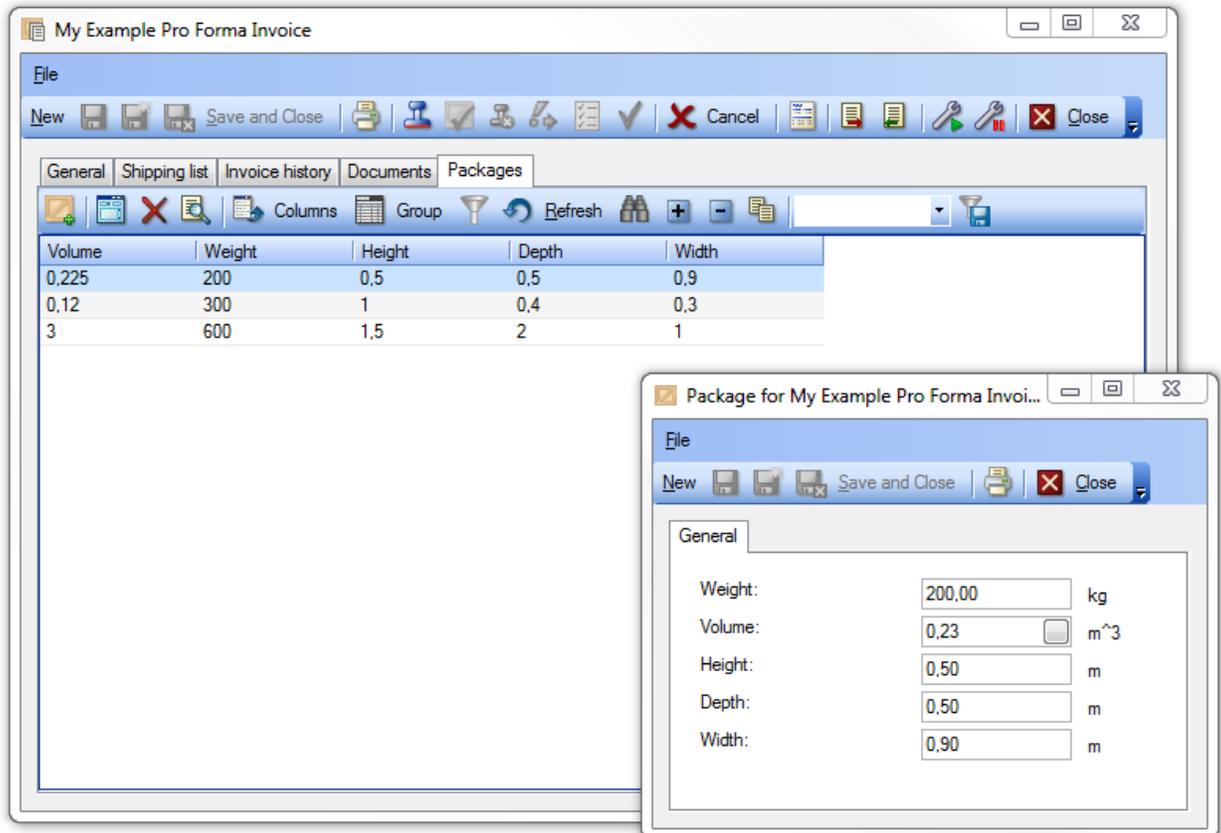
- j. **Our reference:** This is a free text field where you can register your reference person or code for this component transfer.
- k. **Estimated sending date:** Allows you to select an estimated date for when the component(s) should/will be sent.
- l. **Estimated receiving date:** Allows you to select an estimated date for when you expect the component(s) to be received by the receiving unit.
- m. **Total Value:** The total value of the component(s) being transferred.
- n. **Remarks:** Free text field, where you can enter additional information for the transfer.
- o. **Sender unit:** This is the unit where the component(s) currently is/are active
- p. **Receiver unit:** Select the unit to receive the component(s). Only units eligible to receive the component category of the component(s) are listed.
- q. **Receiver address:** When selecting a receiving unit, the selected unit's default delivery address is added to this field. Can be manually overwritten.
- r. **Your Reference:** The receiving party's reference person or code.
- s. **Handling Company:** Select the "Handling company", who will transport/handle the components, by clicking the [...] button.
- t. **Handling company trace no:** Free text field to register the handling company's trace no.
- u. **Transit location:** Free text field to register the current location of the component(s) being transferred. This is manually updated throughout the transfer process.



The "Shipping list" tab on the pro forma invoice form

5. The "Shipping list" tab

- a. **The upper grid:** Here you will find all the assets you are going to transfer with this pro forma invoice.
An asset is either a movable component or a movable stock location. In other words these are the pro forma invoice order lines.
 - b. **The lower grid:** If the item you select in the upper grid is a movable stock location, a list of all items found within that location will be listed in this grid.
 - c.  **[Add a new component to the invoice]:** Allows you to select additional movable components you wish to include in this transfer, directly from this form.
 - d.  **[Add new stock location to the invoice]:** Allows you to select additional movable locations to include in the transfer. , directly from this form.
 - e.  **[Delete the selected item]:** Allows you to remove the selected asset(s) from the pro forma invoice.
6. The “Invoice history” tab
This view will list all status changes through the life of the pro forma invoice, allowing you to retrace the events later on.
 7. The “Documents” tab
From this tab you can attach any document or file related to the transfer.



The “Packages” tab on the pro forma invoice form and the packages details form

8. The “Packages” tab.

The Packages tab allows you to register the number of packages the transfer consists of. You are maybe only moving one movable component, but you may need to ship it in 3 different packages. Each package has 5 attributes “Weight”, “Volume”, “Height”, “Depth” and “Width”. The total weight and volume of all packages is summed up and is shown on the pro forma invoice form “General” tab (ref item 10. h) and i) mentioned previously in this chapter)

- a.  **[Add new package]:** Using this button will open the “Package details form”, once this has been filled out and saved a new package has been added to the transfer.

9. The “Package details” form

- a. **Weight:** Enter the total weight of the package
- b. **Volume:** If you know the total volume for the package you can type it in directly. If you only have the measurements (Height, Depth and Width) you can enter them first (c. d. e.) and then click the small button that will appear (once H/W/D has been filled out), and the program will calculate the volume for you.
- c. **Height:** Enter the height of the package.
- d. **Depth:** Enter the depth of the package.
- e. **Width:** Enter the width of the package.

Pro forma Invoice functions

You will find 10 new functions in the main menu for the pro forma invoice form. 6 of them relate to status changes for the pro forma invoice, through the life of the invoice. They are:

10. Pro forma invoice statuses

- a.  **[Approve]:** When this button is clicked the following will happen
- The invoice is given its invoice number
 - Once approved it is no longer possible to add additional assets to the invoice.
 - TM Master will check that all component categories added to the “shipping list” can be received by the selected receiving unit. TM Master will also check a number of other possible issues, such as running hours masters, postponed jobs and jobs with locally assigned work permits. If a conflict is detected you are notified.
 - The next pro forma invoice status button “Packed” is activated along with the “revoke approval” button.
- b.  **[Revoke approval]** This will return the pro forma invoice to the starting point, and will require a new approval. (all other statuses must also be set again) The revoke approval can be used until the pro forma status is set to “Sent”

- c.  **[Packed]:** The assets being shipped between units need to be packed for shipping before they can be sent. Transfers of assets are usually initiated at the office by an assets co-ordinator in most organisations. However, the person co-ordinating the transfer needs to rely on the people on the vessel or at the location to notify them of when the assets are packed, ready to be transferred. The people doing the actual packing can enter the package details directly if they have access to TM Master v2, and once they are done they can notify the office personnel by changing the status to “Packed”. If they do not have access to TM Master v2, the office personnel can of course enter the information themselves.
- d.  **[Send package]:** When you are ready to send the assets you click [Send package]. The following will then happen.
- TM Master will check for any active jobs linked to any of the movable components. If any are found you will be notified. You are allowed to ship a movable component with active jobs linked to them, but you can also disable (pause) the scheduled jobs while the components are in transit and storage. (For more details on disabling job see item 17 a. and b.)
 - TM Master will check for any orders linked to the components, if any are found the user will be notified. Linked orders are not transferred to the receiving unit.
 - Movable component status is set to “In Transit”.
 - Users onboard can no longer make changes to the assets (or linked jobs) being sent.
 - The movable component’s jobs are removed from the vessels “Due” list, and are now available in the [Due jobs in transit] module.
 - It is now possible for the receiving unit to receive the assets.
- e.  **[Set as Received]:** In order for the receiving unit to add the assets to their system, they will need to click [Set as Received]. Once clicked, a dialog with the shipping list will appear allowing the users to confirm what they have received. By changing the value in the received column they can partly receive the invoice if necessary. Once the invoice is set to received the following happens:
- The assets will now be removed (from view) on the sending unit’s system, and appear in the receiving unit’s system.
 - “Movable component status” on the components are changed to “Received onboard”
- f.  **[Set to finished and set assets to “active onboard”]:** This button is used once the assets have been installed onboard. The following happens once the button is clicked:
- Component status is set to “Active onboard”
 - The movable components jobs are added to the unit’s due list
 - The components are now available for updates/changes
 - If any of the components are placed under a running hour receiving component, the movable component will start receiving running hours.

Export & import of files and documents linked to a movable asset.

TM Master v2 can replicate any document linked to a component, item or job, but sending large files does require a certain amount of bandwidth. There are settings that set a maximum file size for files to be replicated in order for customers to be able to restrict the number of files attached to the system being sent.. As a result some documents are never sent. This can be important information for the users of the components, items or jobs and when a component is transferred we would want all files and documents attached to them also to be transferred, but replicating them is out of the question.

To solve this problem, it is possible to extract all files and documents linked to the assets being transferred. The files can then be saved to a memory stick or burned to a CD/DVD and shipped along with the assets. Once the items are received on the other end, the files can be imported to the receiving system.

11. Export and import functions on the Pro forma invoice form.

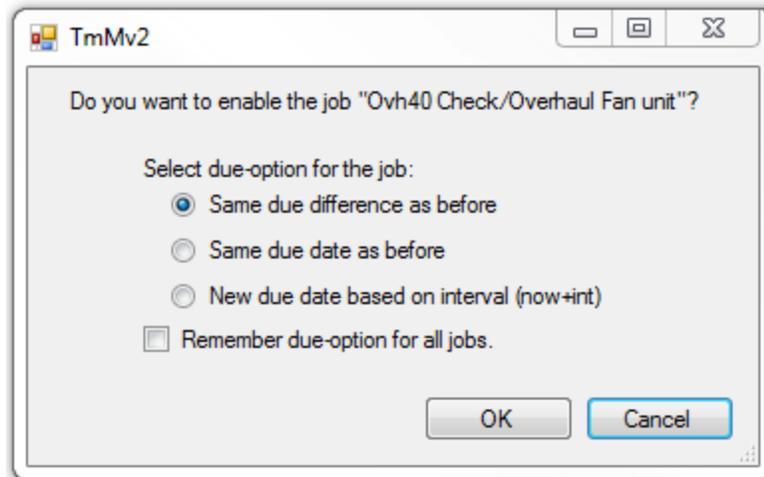
- a.  [Export all asset files to a zip file]: When clicked the user will be asked where to save the export file (.zip), and what to name the file.
- b.  [Import all asset files from a zip file]: When clicked the user will be asked to locate the .zip file with the asset's files.

Disable and enable jobs for components on a pro forma invoice shipping list.

The functions to disable and enable jobs, are available on the “Pro forma Invoice” form. The functions have also been made available for ordinary component jobs, not only movable components. Using the functions from the Pro forma invoice form will disable/enable jobs linked to that pro forma invoice. The linked jobs current status is shown on the pro forma invoice “General” tab.

12. Disable and enable functions in the pro forma invoice form

- a.  [Disable Jobs]: Will disable all jobs linked to components in the pro forma invoice shipping list. Disabled jobs will not become due or overdue, but kept in limbo until enabled again.
- b.  [Enable Jobs]: Will enable any disabled job linked to components in the pro forma invoice shipping list. When disabled jobs are enabled again you will need to decide on what to do concerning the interval settings. The following options are given as shown in image below, one job at the time. The job in question is shown at the top of the dialog box that appears. If you want your selection to apply to all the jobs you are enabling, tick the “Remember due-option for all jobs”



Enable jobs with the same due difference as before.

This means that if the job had 10 days until it was due when it was disabled, it will be added to the due list with 10 days until due.

Same due date as before.

This will make no changes to the job due date and will be added to the due list with the same due date it had when it was disabled. If the job's due date occurred during the period it was disabled, it will reenter the due list as overdue.

New due dated based on interval (now + int.).

This option will reset the due date to the current date + the interval. This means that re-enabling a job that has a monthly interval today, would receive a new due date which would be a month from now..



Due Jobs in Transit

The [Due jobs in Transit] module will keep track of all maintenance jobs on components currently in transit. The jobs for the movable components are removed from a vessel's\unit's due list when the component status is set to "In Transit", and are then only available in this view.

The jobs can be signed out while in transit if required

Jobs can be disabled for components in transit and disabled jobs will by default not appear in the due list. To be able to view the disabled jobs, the "Disabled jobs" check box, found in the due list filter bar, must be ticked. All disabled jobs will be shown in the due list with a strike through.

TM Master v2 (v.2.644 - 16.10.2012)

File Tools Grid Help

All units [Icons] Report [Icons] Columns Group Refresh [Icons]

Due Jobs In Transit - All units 14 jobs

Due date: 18.10.2012 Department: Category: Only running hours Postponed Include est. RH-due
 Only time based Critical Disabled jobs
 Both Include projects Only class jobs All jobs

Unit name	Code	Component	Job type	Status	Job no	Wor...	Job name	Department	Due
Im-Bounty	575-01	E-22-Fuel/Pump-Room-Below...	Qvh		40		Check/Overhaul-Fan-unit	Engine	
Im-Bounty	575-01.01	El-Motor	Meg		2		Megger test annual el. check	Electric	
Im-Bounty	575-02	S-14-HPU-Room-Tween-Deck	Fct		32		Test-All-Fan-stop-and-tripe	Engine	
Im-Bounty	575-02	S-14-HPU-Room-Tween-Deck	Chk		99		Check-fan-while-running	Engine	
Im-Bounty	575-01.01	El-Motor	Qvh		34		Overhaul-of-el-motor	Electric	
Im-Bounty	575-02.01	El-Motor	Qvh		34		Overhaul-of-el-motor	Electric	
Im-Bounty	575-02.01	El-Motor	Meg		2		Megger test annual el. check	Electric	
Im-Bounty	575-02.01	El-Motor	Lub		15		Lubricate-El-Motor	Electric	
Im-Bounty	575-01.01	El-Motor	Lub		15		Lubricate-El-Motor	Electric	
Im-Bounty	575-02	S-14-HPU-Room-Tween-Deck	Qvh		40		Check/Overhaul-Fan-unit	Engine	
Im-Bounty	575-01	E-22-Fuel/Pump-Room-Below...	Lub		25		Grease/Move-Damper	Engine	
Im-Bounty	575-01	E-22-Fuel/Pump-Room-Below...	Chk		99		Check-fan-while-running	Engine	
Im-Bounty	575-01	E-22-Fuel/Pump-Room-Below...	Fct		32		Test-All-Fan-stop-and-tripe	Engine	
Im-Bounty	575-02	S-14-HPU-Room-Tween-Deck	Lub		25		Grease/Move-Damper	Engine	

14 jobs Last service loop: 21.05.2012 10:58:52 | cato, logged on to DB - UNKNOWN.TEROMARINE\Nibbler

The "Due Jobs In Transit" view, listing all the disabled jobs for the component in transit.