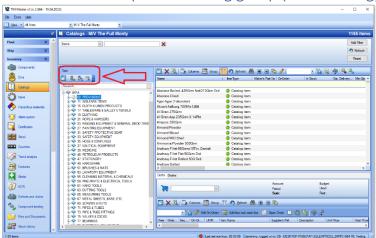
How to Catalogs

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Revised 27.04.2022



How to create a top-level catalog group (New Catalog)

- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Click [Add a root node to tree] in the Catalog structure pane
- 3. Type a name for the group
- 4. Click [OK]

Note: It is also possible to add groups from the drop down 'Tree' Menu and the right click menu.

How to create a sub-level catalog group

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- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Select an existing group in the structure pane
- 3. Click [Add a sub node to selected node] in the Catalog structure pane
- 4. Type a name for the group
- 5. Click [OK]

Note: It is also possible to add groups from the drop down 'Tree' Menu and the right click menu

How to add a new catalog item to a catalog

- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Select the group in the structure pane that you wish to add a new item to
- 3. Click [New] 2. Set the top left of the screen
- 4. Fill in the Name of the item and any other details you have.
- 5. Click [Save and Close]

How to add stock to a catalog item

- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Select the group in the structure pane that contains the item you want to add stock to
- 3. Right click the item you want to add stock to
- 4. Select [Add Stock]
- 5. Specify the quantity of stock and other details you have
- 6. Click [OK]

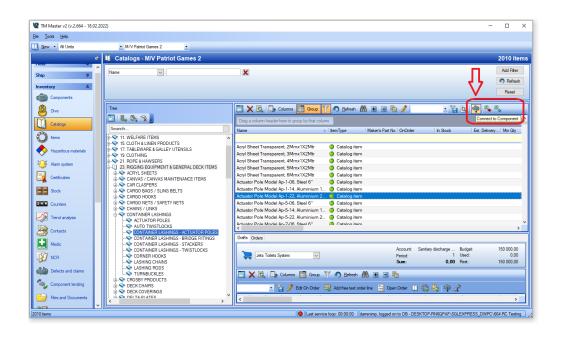
How to withdraw stock from a catalog item

- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Select the group in the structure pane that contains the item you want to add stock to
- 3. Right click the item you want to withdraw stock from
- 4. Select [Withdraw Stock]
- 5. Specify the quantity of stock and any other details you have
- 6. Click [OK]

How to add a catalog item to a draft order

- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Select the group in the structure pane that contains the item you want to add to a draft order
- 3. Right click the item
- 4. Select [Add to Draft] and either select an existing draft or [New Draft]
- 5. If selecting [New Draft], you will be asked to write a name for the new draft and click [OK]
- 6. Specify the quantity that you want to order
- 7. Click [OK]

How to link a catalog item to a component



- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Select the catalog that contains the items you want to link to components
- 3. Select the Item(s) you wish to connect to one or several components
- 4. Click [Connect to Component]
- 5. Select one or more components to link the catalog item(s) to
- 6. Click [OK]

How to link a catalog item to a component job

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	HP 304A	🍯 Catalog item	5	0	0				Instr.room/Offic	HP Compaq	CC531A
	HP 300 XL	Catalog item	3	0	0				Instr.room/Offic	HP Compaq	CC644EE
	HP 304A	Catalog item	3	0	0				Instr.room/Offic	HP Compag	CC533A

- 1. Click [Inventory] \rightarrow [Components]
- 2. Double click the component that has the relevant job
- 3. Select the 'Jobs' tab
- 4. Double click the relevant job
- 5. Select the 'Items' tab



- 6. Click [Add Catalog Item]
- 7. Select the catalog that contains the item(s) you want to link to the job
- 8. Select the item(s) that you want to link to the job
- 9. Click [OK]
- 10. Specify the quantity required for each item for that particular job
- 11. Click [OK]

How to link catalog items to components and jobs directly from an order

- 1. Click [Purchasing] \rightarrow [Overview]
- 2. Locate the order that contains the items that you want to link
- 3. Double click the order
- 4. Select the 'Order lines' tab
- 5. Select the items in the list that you want to link
- 6. Click [Connect to Component] To connect to Component Job]
- 7. Select the component or component job from the list and click [OK]

Note: this function will not work for free order lines. (you will be informed of this if you try to link free order lines)

How the catalog query filter affects the item list

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	17. TABLEWARE & GALLEY UTENSILS	Ball Bearing Double Row, Deep Groove N 🥥 Catalog item	

Applying a query filter at the top of the catalog view will affect which items are shown in the item list pane.

In the example shown above, the item list will only show items which contain the text 'ring' in the name and have the item category 'Paint'.

The query filter works in combination with the selection made in the structure pane, so selecting a group in the structure pane will limit the item list to only that group and the items that satisfy the query filter.

How to move a catalog item from one group to another

- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Select the catalog that contains the item you want to move
- 3. Select the Item in the item list
- 4. Drag and drop the item into the group structure where you want to move it to.

How to hide a catalog group for a specific unit (Office Only function)

- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Select the catalog group that you wish to hide
- 3. Right Click on the group and select [Hide catalog for..]

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- 4. Select the Unit or Unit group that you wish to hide the catalog group for
- 5. Click the appropriate arrow button to add the Unit or Unit Group to the 'Hidden for' list.

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M/V Patriot Games 2 M/V The full Monty Test Empty Warehouse 13		

6. Click [Save and Close]

How to show (unhide) a hidden catalog group for a specific unit (Office Only function)

- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Right Click on any group in the structure pane and select [Show Hidden..]
- 3. You will then be shown which catalog groups are hidden for the currently selected unit

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4. Select which group you want to Show (unhide) and click [OK]

Note: This action can also be done by using the 'Hide catalog for' method (see 'How to hide a catalog group for a specific unit' earlier in this manual) and just moving the appropriate unit or unit group from

the right-hand side to the left-hand side using the appropriate arrow button . However, you will need to be viewing the catalog for a unit that does currently have access to the hidden group.

How to export items to the excel update sheet (Office Only function)

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Stock App Import	
2211 items	Last service loco: 00.00.00 damenimo. locaed on to DB - DESKTOP-RN6QPAP-SQLEXPRESS_DWPC'664 RC Testing

- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Make a selection in the structure pane or use the query filter to find the items you wish to export
- 3. Select the items in the grid that you wish to export
- 4. Click [Export Item List to Excel]
- 5. Click [Include Selected Items] in the dialog

V	2	×
	Do you want to create an empty sheet or one that includes the selected items?	
	Empty Sheet Include Selected Items	

6. Choose a location to save the excel file and Click [Save]

Note: the selected items will now be in the excel sheet, where you can change details in the available columns and import the changes.

How to Import updated items from the excel update sheet (Office Only function)

1. Click [Inventory] \rightarrow [Catalogs]



- Click [Import Item List from Excel]
 Locate the file, select it and click [Open]
- Tick the item updates that you wish to import

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Ball bearing 🌀 Catalog item SKF	6306-2Z/
🔲 Ball Bearing Double Row, Deep 🍯 Catalog item	
🔲 Ball Bearing Double Row, Deep 🍯 Catalog item	
🔲 Ball Bearing Double Row, Deep 🍯 Catalog item	HGFDr
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٢	>
Quality Check Failed	2 items
🛃 🗈 Columns 🧮 Group 🍸 🦘 Refresh 👫 🕒 🖃 🖷 🖋	- 🐪
Name 🔺 Item Type 🛛 Maker 🗍 Maker's Type	Maker's P Stock Tag Item Category
Ball Bearing Double Row, Deep 🌖 Catalog item	234243
Ball Bearing Double Row, Deep 🌖 Catalog item	32424
<	>

- 5. Click [Import]
- 6. If you have not ticked all the items in the list, you will be presented with a dialog



7. Click [Import selected items and Close] if you are finished making all your selections

Note: Items which have failed the quality check will be listed in the lower pane. It will not be possible to import these until the error has been corrected. Items can be edited directly in the grid after clicking

the [Edit Grid] further button. As soon as the error has been corrected, the item will move to the upper grid.

How to import New catalog items from the excel update sheet (Office Only function)

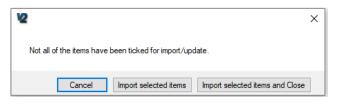
1. Click [Inventory] \rightarrow [Catalogs]



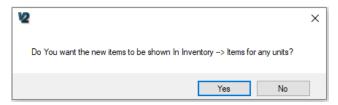
- 2. Click [Import Item List from Excel]
- 3. Locate the file, select it and click [Open]
- 4. Select the 'New Items' tab
- 5. Tick the new items that you wish to import

Import Consumables		– 🗆 ×
Updating Items New Items		
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Random Item 2	🍯 Catalog item 🛛 ABB	
Random Item 4	🍯 Catalog item 🛛 ABB	EL456 45698
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Columns Group Name Random Item 3	 Item Type Maker Maker's Type Catalog item Cadbury 	

- 6. Click [Import]
- 7. If you have not ticked all the items in the list, you will be presented with a dialog



- 8. Click [Import selected items and Close] if you are finished making all your selections
- 9. You will then be asked if you want to show the new items on any of the units



- 10. Click [Yes] ****
- 11. Select which unit(s) you wish the items to be shown for in the Inventory \rightarrow Items module and click [OK] ****
- 12. You will be informed when the new items have been imported, click [OK]

Note: Items which have failed the quality check will be listed in the lower pane. It will not be possible to import these until the error has been corrected. Items can be edited directly in the grid after clicking

the [Edit Grid] *solution*. As soon as the error has been corrected, the item will move to the upper grid.

**** The item data will be imported whether you choose Yes or No. Choosing which units you want to show the items will just decide which Units will see the items immediately in the Inventory \rightarrow Items grid

How to block (and unblock) catalog items

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Stock	31. SAFETY PROTECTIVE GEAR 33. SAFETY EQUIPMENT	Ball bearing Ó Catalog item 6306-2Z/C3 0 Ball Bearing Double Row, Deep Groove N Ó Catalog item	3	
249 Counters		Ball Bearing Double Row, Deep Groove N 🧕 Catalog item Ball Bearing Double Row, Deep Groove N 🧯 Catalog item		
Trend analysis		Ball Bearing Double Row, Deep Groove N 🤵 Catalog item		
	47. STATIONERY	Ball Bearing Double Row, Deep Groove N O Catalog item Ball Bearing Double Row, Deep Groove N Catalog item		
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Defects and claims	65. MEASURING TOOLS	Ball Bearing Double Row, Deep Groove N S Catalog item	Z,	Print Preview
Component lending	⊕ ◆ 67. METAL SHEETS, BARS, ETC. ⊕ ◆ 69. SCREWS & NUTS ⊕ ◆ 71. PIPES & TUBES	Crafts Orders		Select All
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	, U (Last	an normal source of an antipy logged on to be - DESKTOP PRIVATE SULEX THE DWPC IS		Block Selected Items
				Unblock Selected Items

- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Make a selection in the structure pane or use the query filter to find the items you wish to block
- 3. Select the items and right click
- 4. Select [Block Selected Items]
- 5. You will then be asked to write a reason for blocking the items. Write a reason
- 6. Click [OK]
- 7. Click [Refresh]
- 8. The items will now be displayed with a small coloured dot beside the name to indicate that they are blocked (see below)

bail bearing bouble now, beep groove n	•	Gataio
Ball Bearing Double Row, Deep Groove	۲	Catalo
Ball Bearing Double Row, Deep Groove	۲	Catalo
Ball Bearing Double Row, Deep Groove	۲	Catalo
Ball Bearing Double Row, Deep Groove	۲	Catalo
Pall Paaring Double Pour Doop Groove N	6	Catalo

Note: Blocked items cannot be added to a purchase order. Unblocking is done in exactly the same manner, but you need to select 'Unblock Selected Items' from the right click menu.

How to Edit unit specific fields in the catalog grid

TM Master v2 (v.2.664 - 19.04. Tools Help	everi		- 0
New • All Units	M/V Patriot Games 2		
e	Catalogs - M/V Patriot Games 2		2211 ii
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	Name 🔽 "Ring"	🗶 Item Category 🔍 PT - Paint	T 7 Perfor
Catalogs			(*) Hete
		V	Reset
tems			
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ristarous marenars	🗒 👢 🗞 🛠 👷	Name ~ temType Maker's Pat	In Stock Est. Delivery Min Oty Max Oty UOM Default location Stock Ta
Alarm system	Search		
	A STAR AND A STAR AND AND A STAR AND A STAR AND AND A STAR AND AND A STAR AND A STAR AND A STAR AND AND A STAR AND	Ball bearing Gatalog item 6306-2Z/C3 0	3 0 2,00 6,00 Upper Engine
Certificates	B-S 27. PAINTING EQUIPMENT	Ball Bearing Double Row, Deep Groove N 🤵 Catalog item	PCS
Stock	31. SAFETY PROTECTIVE GEAR	Ball Bearing Double Row, Deep Groove N 🥥 Catalog item	PCS
-	A SAFETY EQUIPMENT A S SHOSE & COUPLINGS	Ball Bearing Double Row, Deep Groove N 🥥 Catalog item	PCS
Counters	a St. Hose according	Ball Bearing Double Row, Deep Groove N 🥥 Catalog item	PCS
a	B-S 39. MEDICINE	Ball Bearing Double Row, Deep Groove N 🍯 Catalog item	PCS
Trend analysis	⊕ ◆ 45. PETROLEUM PRODUCTS ⊕ ◆ 47. STATIONERY	Ball Bearing Double Row, Deep Groove N 🥥 Catalog item	PCS
Contacts	9- V 49. HARDWARE	Ball Bearing Double Row, Deep Groove N 🥥 Catalog item	PCS
		Ball Bearing Double Row, Deep Groove N 🥥 Catalog item	PCS
Medic		Ball Bearing Double Row, Deep Groove N 🥥 Catalog item	PCS
	59. PNEUMATIC & ELECTRICAL TOOLS	Ball Bearing Double Row, Deep Groove N 🥥 Catalog item	PCS
O NCR	61. HAND TOOLS	Ball Bearing Double Row, Deep Groove N 🥥 Catalog item	PCS
Defects and claims	G. CUTTING TOOLS G. MEASURING TOOLS	Ball Bearing Double Row, Deep Groove N 🥥 Catalog item	PCS
-	67. METAL SHEETS, BARS, ETC.		200
Component lending		Drafts Orders	
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Files and Documents	- T5. VALVES & COCKS	Catalog manual	Account: Budget: 0 Period: 1 Used: 0
Stock history		Calady manda	Sum: 0.00 Rest: 0
· · · · · · · · · · · · · · · · · · ·	€ S CYLINDRICAL ROLLER BEARINGS		
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	SERIES 1200-CYLINDRICAL BORE	Free Orde Seq On Or UOM tem Name Suppler's Ref	Description Unit Price Total Price Currency Catalog No. Catalo
Stock App Import		1 5 New catalog Item 10	0.00
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- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Make a selection in the structure pane or use the query filter to find the items you wish to edit
- 3. Click [Edit Grid]
- 4. The columns you can edit will now be coloured blue.
- 5. Edit accordingly and click [Edit Grid] do save the changes

Note: This function is available to users who have the special 'Implementor' user right access and to normal users that have the rights to edit item unit fields.

How to find total in stock and total on order for the whole fleet

e	🔿 Fleet Item	s - All Units									2496 i
*	tem Type	Al	N	Name		✓ "Ring"		×			Add Filt
KPI			L								S Refr
Units											Rese
Components	NXR	🔓 Columns 🛅 Group 🍸	🔊 <u>R</u> efresh 🕌			. 🏹 🖏 🔊					
Fleet Items		ader here to group by that column	_								
Those acting			_					1			
Locations	Item Type	Name	Maker	Maker's Part No	Makers Type	UOM	Stock Tag	Catalog No	Total in Stock	Total On Order	Item Group
	O Spare part	Gasket for oil p/p & rear b		FX16/2051		PC			3	0	
PO	O Spare part	O-ring pos.60	Kamewa Finla			PC			2		
	Catalog item	Ball bearing	SKF	6306-2Z/C3		PC			3	0	-
Assessments	Catalog item	O-ring pos.42	Kamewa Finla	6359419		PC			13	0	
	O Spare part	Spring washer for fuse 9 Bearing		SKF 6305-C3		PC			0	0	
Due	Spare part Spare part	Seal-O-Ring	0.1.11.110	109-7411		PC			3	0	
	Spare part	Reguleringsknapp for diff	Caterpillar, US	NB 269 Ulstein.		PC	10		3	0	
History	O Spare part	O-ring	Bauer Kompre			PC	10		2	0	
Certificate overview	O Spare part	SEAL-O-RING	Caterpillar, US	6V-5101		PC			0	0	
Certificate overview	O Spare part	Motor Bearing Drive End	Kaeser Kompr			PC			0	0	
Forms & Procedures	O Spare part	Bearing Bearing	Kaeser Kompr	SKF 6202-2Z-C3		PC			0	0	
	O Spare part	Seal ring 27x22x2	Bock Frichenh		,	PC			0	0	
Standard jobs	O Spare part	SPRING (BIG)	Tenfjord Styre			PC			2	0	
	O Spare part	O-ring pos.56	Kamewa Finla			PC			2	0	
Alarm Standard jobs	O Spare part	Ball bearing	Kamewa Finia	YET 205		FG			6	0	
Stock	O Spare part	O-ring	Alfa Laval India			PC			6	0	
Stock	O Spare part	O-ring	Alfa Laval India			PC			22	0	
	O Spare part	Seal O-Ring	Caterpillar, US	6V-5103		PC			12	0	
NCR	O Spare part	Bearing NDE	SKF	6204-2Z/C3		PC			0	1	
	O Spare part	Bearing	SKF	SKF 6310 C3		10			0	0	
Change Log	O Spare part	Seal-O-Ring	Caterpillar, US	5P-7701		PC			12	0	
	O Spare part	O-ring 82,22x2,62	Bock Frichenh			PC			1	0	
Budget	O Spare part	O-RING EPDM UV Steri				PC			2	0	
Defects and claims	O Spare part	Sealing Ring POS: 53 Dr				PC			0	0	
Derects and claims	Conception and	SPRING ED VALVE	Inte Vacuum AS			PC			2	0	
Database backup	<										
o atabaro poortop	Stock Occurrences	Used in Components Used in	Component Jobs D	rafts Orders					_		
Accommodation		🐌 Columns 🛅 Group 🍸				1					
Crew list	Unit Name	InStock Min Qty Max Qty	OnOr SupplierN	ame SupplierRef	Item Name	Review MinMax	Consumption 20	22 Consumption 20	21 Consumption 20	020 Unit Specific Re	
	M/V Patriot Ga			yce 6353627	O-ring pos.		0	0	0		
Time sheet overview	111										_

- 1. Click [Fleet] \rightarrow [Fleet Items]
- 2. Set the filters at the top of the view according to find the item(s) you are looking for
- 3. Click [Refresh]
- 4. The columns 'Total Stock' and 'Total On Order' can be found in the grid and are total values for the entire fleet. Clicking on an item will show which units have the stock in the lower pane.

How to delete a catalog group

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	C the second sec	Abaione Boiled, 425Grm Net/213Grm Dr		
tena	B LL DO PROVISIONS	Abalone Dried	Catalog item	
	a 😵 11. WELFARE ITEMS	Ager-Ager (Tokoroten)	Catalog item	
Hecordous rustenals	 T. CLOTH & LINEN PRODUCTS T. TABLEWARE & GALLEY UTENSILS 	Aiwavit Autoorg 700Mix12Bd	Catalog Isan	
	 Sector Processing Sector Processing 	Al Bran 375Gm	Catalog item	
Aarn system	21 BOPEA HAWSERS	All Bran App.235Grm X 14Pit	Catalog item	
	23 RIGGING FOLLENENT & GENERAL DECK ITE	Allepice 3500m	Catalog item	
Cotificates	A ST PAINTING FOUPMENT	Airrord Powder	Catalog Rem	
	# A 31. SAFETY PROTECTIVE GEAR	Almond Blood	Gatalog item	
anck .	i # AP 33 SAFETY EQUIPMENT	Almond WO Shell	Catalog tem	
	# No 15 HOSE & COUPUNGS	Ammonia Powder 500Grm	Catalog item	
Counters	i si ≪ 37. NAUTICAL EQUIPMENT i si ≪ 39. MEDICINE	Anchow Fillet 65Gma 10Tin, Denish	Gebelog item	
	A S AS PETROLEUM PRODUCTS	Anchory Fillet Flat 500im Did	Gatalog tom	
Transformation	A STATIONERY	Anchow Fillet Rolled 50G Drd	Catalog tem	
	# 🔷 49. HARDWARE	Anchory Salted	Catalog tem	
Contexts	🗄 🔅 🖘 51. BRUSHES & MATS	<		2
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Files and Documents	i # A 75 VALVES & OOCKS	Free Orde., Sec., On Dr., LOM		
	# 🅎 77. BEARINGS		Ben Name Supplier's Ref	Description Unit Price Total Pr
Rock history		, (

- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Select an existing group in the structure pane
- 3. Click [Delete node] in the Catalog structure pane
- 4. If there are items in the catalog group you will then be asked if you want to delete them or just set them to ungrouped, select the option you wish.

D	elete Group	×			
	For the manual will be deleted. Do you also want to delete the related elements?				
	O Delete all elements				
	OK Cancel				

- 5. Click [OK]
- 6. If you select 'Delete All Elements' and some of the items are in use (connected to stock records or components for example), you will be asked if you want to 'keep' the items or 'hide' them. Select the appropriate option

ms set to ungrouped	>
The listed items could not be deleted, and were set to ungrouped in stead, click on the "Hide items" button to hide the items completely from the catalog.	
The manual item	^
Keep items Hide items	-

Items that are in use cannot be deleted without removing the connections first.

Note: It is also possible to delete groups from the drop down 'Tree' Menu, and the right click menu.

How to delete a catalog item

- 1. Click [Inventory] \rightarrow [Catalogs]
- 2. Select the appropriate catalog group in the structure pane
- 3. Select the item that you wish to delete
- 4. Click [Delete the selected item] in the Item list pane
- 5. If there are no links to the item, then you will be asked to confirm the deletion. Click [Yes]
- 6. If the item is 'in use' (connected to stock records or components for example), you will be asked if you want to 'hide' the item from the catalog. Select the appropriate option

TM Master	rv2							
?	Can not allow deletion of item "New catalog Item 11", because other entities are connected to it: Components							
	Do you want to hide the item from the catalog instead (the item will still be present but not in the catalog)?							
Yes Yes to all			No	Cancel				
	_							

How to delete items 'in use' without needing to delete connections first.

Note: this function requires a dedicated user right and is only possible from two views in TM Master V2 – Fleet \rightarrow Items and Tools \rightarrow Catalog Cleaning

- 5. Click [Fleet] \rightarrow [Fleet Items]
- 6. Set the filters at the top of the view according to find the item you wish to delete.
- 7. Click [Refresh]
- 8. Select the item that you want to delete
- 9. Click [Delete the selected item] in the Item list pane
- 10. You will now be given a warning that you are about to delete and item in use, Click [Yes] if you still want to perform the action

Warning!	×
The selected items will be deleted along with all stock and stock history throughout the fleet. We recommend cleaning items in the spare part cleaning tool instead of deleting them. All connections to components, component jobs And order lines will also be removed. Removing the connection to an order line changes it to a 'Free order line'. These actions cannot be undone, are you sure you want to do this?	
Yes No	

User rights for catalogs

Read - Allows the user to view Catalogs and catalog items in both overviews and detail views

Edit – Allows the user to edit Catalog Items central data**

Add – Allows the user to create new catalog items

Delete – Allows the user to delete catalog items that are not currently in use****

EditGrid – Not in use

EditItemUnitFields - Allows the user to edit the unit specific fields for a catalog item

SetHideForUnits – Allows the user to hide catalog groups and their contents for specific units (this function is only available at the office installation)

DeleteUsedItem – Allows the user to delete catalog items which are currently in use****

BlockUnblock - Allows the user to apply or remove the 'Blocked' flag for an item

ImportExport – Allows the user to utilize the Import/Export excel sheet for catalog items (this function is only available at the office installation)

EditComponentItemFields – Allows the user to edit the component link specific fields for catalog items

EditCatalogStructure – Allows the user to

DeleteItemUnit – Allows the user to delete the link between an item and a unit (only possible if links to components and stock have already been removed)

AddImage - Allows the user to add pictures to items

**If a catalog item is validated, it is not possible edit common data fields at vessel installations

****'In Use' means that the catalog item is linked to units, stock records, components and/or component jobs