Replace a component with a spare from another asset

This article is for Helm CONNECT Maintenance customers who have the Inventory module.

Tip

If you have a spare component, but it's not listed in Helm CONNECT yet, see the *Replace a component by creating a new component* article for information on how to add it to the system and use it to replace an existing component.

You can use Helm CONNECT to track when you replace equipment onboard an asset with a spare from another asset. This is a multi-step process, and this article will walk you through the steps required to do this effectively. Here's what you'll be doing:

- **Part 1 - Transfer the component**: If the component you want to use as a replacement is part of another asset's inventory, you'll use the Inventory menu to move the replacement component from that asset to the inventory of the asset where it will be used.

- **Part 2 - Replace the component**: You'll then replace the existing component with the component you just transferred.

- **Part 3 - Update related maintenance checklist templates**: If you have maintenance checklists scheduled based on running hours tracked for this component, you'll also update the due values on the related maintenance template(s).

> **Note**
> If you're tracking cumulative reading types other than running hours, such as fuel burn, you'll update those values in Part 3 in the same way you would running hours. For simplicity, in this article only running hours are used.

Some things to keep in mind before you start:

- A component can be replaced only by another component of the same type.
- You must not deactivate or remove a component from the component tree at any point in this process, as this will alter the component tree structure.

Part 1: Transfer the spare component to your asset

The first thing you'll do is transfer the spare component from one asset to another. You can skip this section if the spare component is already in the inventory of the asset where you want to use it.

To transfer a component

1. Go to the **Inventory** > **Inventory** > **Components** tab.

2. In the **Asset** field, select the asset where the spare component is located now.

3. Click **Edit**.

4. Click the **Transfer component** icon beside the component you want to transfer.

5. In the **Transfer Component** window, select your name from the **Transferred By** list, and then select the asset where the component is going to. Enter any additional information required, then click **Transfer**.

The transferred component is now part of the target asset's inventory but it's not active yet. You'll do that next.

Part 2: Replace the current component on the asset with the spare

Now you'll replace the existing component with the spare component you just transferred.
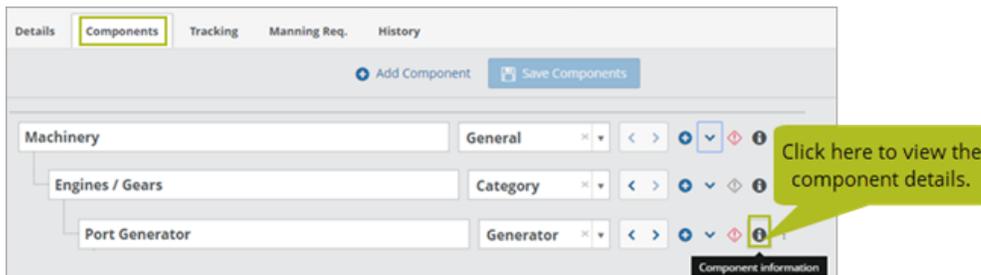
To replace the current component

1. Go to your work space in **Onboard** > **Logs**.

2. In the **Asset** list, select the asset where you just transferred the spare component to.

3. Click **Log a new task**, then click **Replace Component**.

4. In the **Replace a Component** window, in the **Component** list, select the component you want to replace.

> 📝 **Note**
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> Any information in the system about this component will display in the fields automatically. Make a note of the running hours value because you'll verify this value in a later step.

5. In the **Replace with a deactivated component** list, select the spare component you just transferred.

6. In the **Activated Date** field, select the appropriate date.

7. Click **Replace**.

8. To verify the replacement happened correctly, go to **Management** > **Assets**, select your asset, click the **Components** sub tab, then click the **Component information** icon for that component.

The original component has been deactivated and is no longer assigned to a position in the component tree. Instead, it's now in the asset's inventory and can be transferred to a different asset as required.

Part 3: Set due values on related maintenance templates

When you replace a component, the system resets the due values in any related maintenance templates that are scheduled based on running hours (or other cumulative readings) to the frequency defined in the schedule, because it assumes that either the component is new or that maintenance was just completed on the new component.

The final step is to update the due values on any related maintenance templates for that component that are scheduled based on running hours (or other cumulative readings).

To set due values on a maintenance template

1. Go to the **Setup** > **Templates** > **Maintenance** tab and locate the maintenance templates related to the component. You can filter by the asset and the component to find any related templates.

2. Open the template you want to update, but DO NOT click Edit.

3. In the template header, click the **Due (Running Hours)** field then, in the **Set due** window, enter the actual number of running hours until the maintenance template is due.

4. Click **Set due**. The system will automatically update the due hours on the published checklist.

5. View the maintenance checklist in **Onboard** > **Logs**; it now shows the correct number of units until it's due, in this case, running hours.

6. Review all maintenance templates related to this component that are scheduled based on running hours (or other cumulative readings) to determine whether or not the due values need to be updated.

Note

If your maintenance templates have schedules that use more than one cumulative reading type, you'll need to update all due values.