Helm CONNECT

Support Article

Rev 2

Replace a component by creating a new component

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

Tip

If you already have a spare component in Helm CONNECT, but it belongs to another asset, see the *Replace a component with a spare from another asset* article for information on how transfer the component to where you need it.

Sometimes it's necessary to replace a component onboard an asset with a spare component that doesn't exist in Helm CONNECT yet. This article will walk you through the steps to do this effectively. In this example, here's what you'll be doing:

- **Part 1 - Replace the existing component**: Replace the component on an asset with a new component that you create and add to Helm CONNECT.
- **Part 2 - Initialize the due values for the new component**: Tell the system what the current running hours are for the new component.
- **Part 3 - Update related maintenance checklist templates**: If you have maintenance checklists triggered by running hours tracked for this component, you'll also update the due hours 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 2 and Part 3 in the same way you would running hours. For simplicity, this article uses running hours in the examples.

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: Replace the existing component

The first thing you'll do is create a new component and use it to replace the existing one.

To replace the existing component with a new one

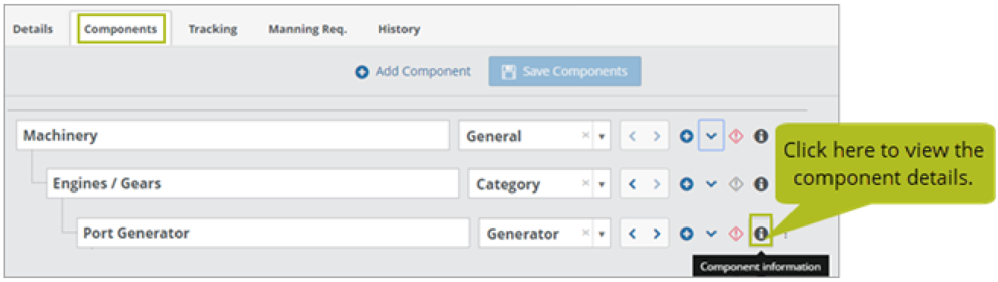
1. Go to your workspace in **Onboard** > **Logs**. Make sure you have the correct asset selected.
2. Click **Log a new task**, then click **Replace Component**.
3. In the **Replace a Component** window, in the **Component** list, select the component you want to replace.

   Note

   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.

4. In the **Make** field, for the new component, select an existing manufacturer name from the list or type a new name.
5. In the **Model** field, for the new component, select an existing model from the list or type the model information.
6. In the **Activated Date** field, select the appropriate date.
7. (Optional) Enter a part number and serial number. Adding this information provides a more complete record of the item in the system.
8. If there are custom fields configured in your system, enter information in those fields as required.
9. Click **Replace**.

10. 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 the component.



Click here to view the component details.

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.

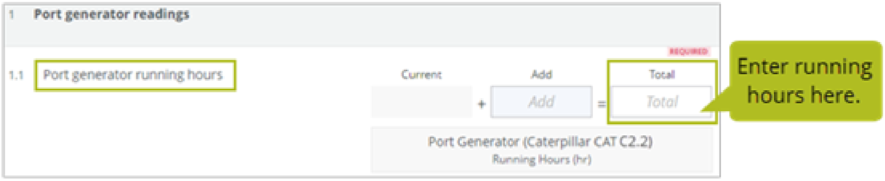
Part 2: Initialize due values for the new component

If the component you created to replace the original one is brand new and has no running hours, you can skip this section. If the component does have running hours on it, you'll need to update this value in Helm CONNECT. If you're tracking other cumulative reading types for this component, you initialize them in the same way you would running hours. In this article, for simplicity, only running hours are used in the examples.

To initialize due values

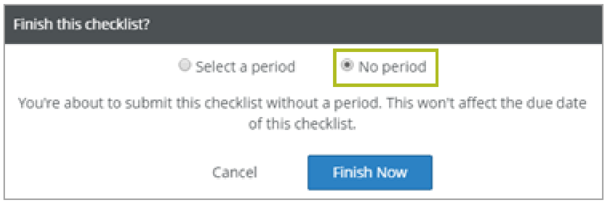
1. Go to your workspace in **Onboard** > **Logs** and open the maintenance checklist used to record the running hours for the component you just replaced.

2. In the **Total** field, enter the running hours for the component.


1 Port generator readings
1.1 Port generator running hours
REQUIRED
Current
Add
Total
+
Add
=
Total
Port Generator (Caterpillar CAT C2.2)
Running Hours (hr)

Enter running hours here.

3. Complete the checklist, then click **Finish Now**, select **No Period**, then click **Finish Now** again. This will update the running hours value in the system for this component.



Finish this checklist?

○ Select a period ● No period

You're about to submit this checklist without a period. This won't affect the due date of this checklist.

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. When you initialize the running hours, as you did in Part 2, the due values in any maintenance templates linked to that component will be updated automatically. Right now, it'll look like the checklist is overdue.

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 related published 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.