



Adding and Creating Movements in Operate


Use the following procedure to add and create Movements in Operate through Movement Summaries, as well as configure the Movement Settings. Prerequisites: You must belong to a FuelsManager user group with appropriate security access rights to view and modify data. Some pages may not be available for entry or edit depending on your user security rights.

Operators may set up Movements to monitor product transfers using Operate from the Movement Summaries. A movement involves transferring product from one Source to one or more Destinations, or multiple Sources to one Destination. When a Movement Point is *Active*, the Movement Node(s) data are acquired periodically and stored in the Movement Point Data Tags for retrieval and display on the Movement Summary.

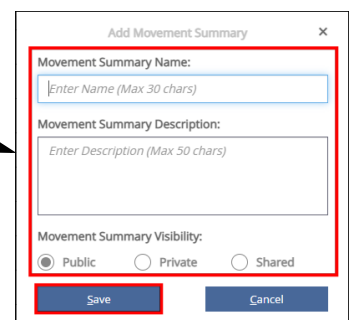
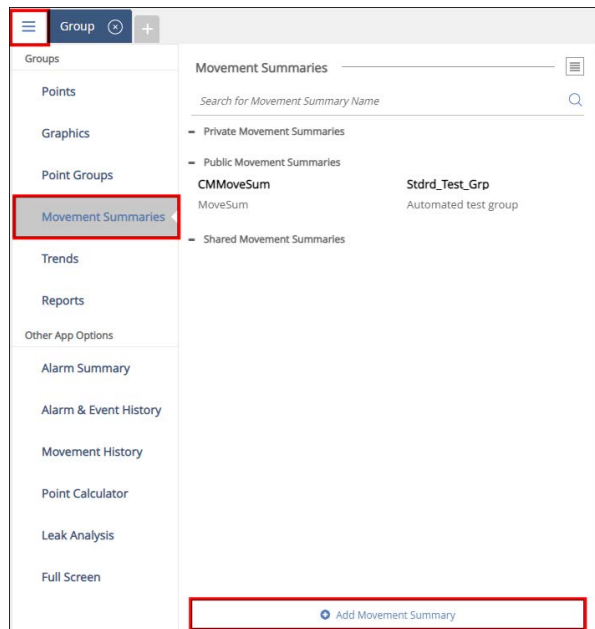
This document includes information on adding and setting up a Movement on the Movement Summary, as well as creating a new movement from the Summary. For more information on starting/stopping the Movement, see [QRG522 Recording Movements in Operate](#).

1 Adding a Movement to the Summary

You may add a new Movement to Movement Summaries in Operate. Follow the steps below:

- 1) Log in to **FuelsManager**.
- 2) From the menu, select **Operations > Inventory Management > Operate**. The Operate page displays.
- 3) Hover over the **Task Groups menu**  icon. The Task Groups menu displays.
- 4) Select **Movement Summaries**. The Movement Summaries menu displays.
- 5) Click **Add Movement Summary** to configure a new Movement Summary. The Add Movement Summary dialog displays.
- 6) Enter the **Movement Summary Name**. This is a required field.
- 7) Enter the **Movement Summary Description**, if desired.
- 8) Select the *Movement Summary Visibility*:
 - **Public** - other users logged in at your Site can view and modify the Movement Summary.
 - **Private** - only the user who added the Movement Summary can view and modify it. Your private Movement Summary is hidden from the menu when other users log in to your Site.
 - **Shared** - other users logged in at your Site can view the Movement Summary, but only the user who created the Movement Summary can modify it.
- 9) Click **Save** to add the Movement Summary or **Cancel** to discontinue action.


A new Operate tab opens an empty Movement Summary table in the Operate workspace.

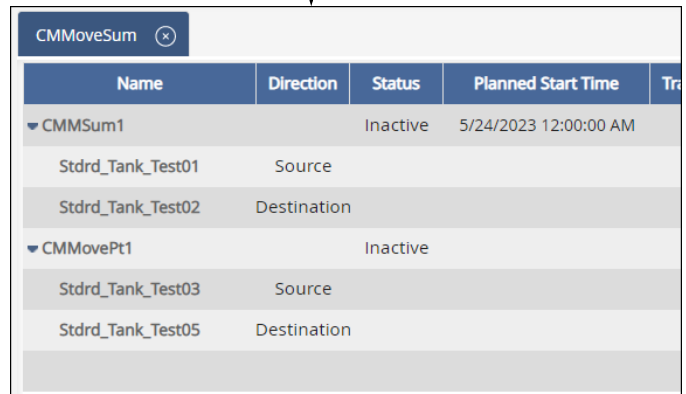
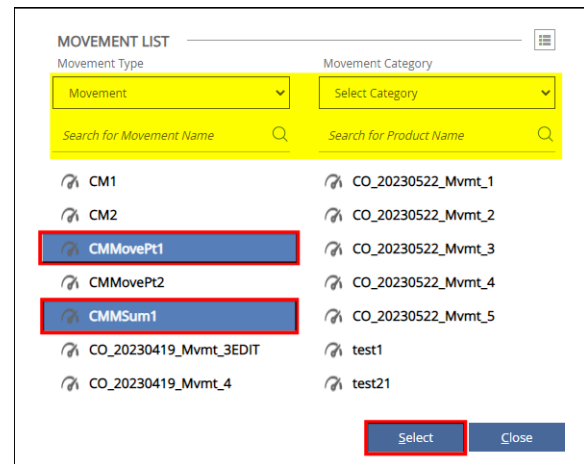
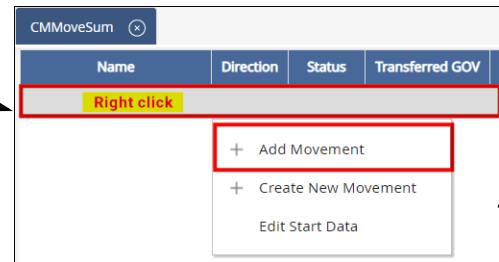
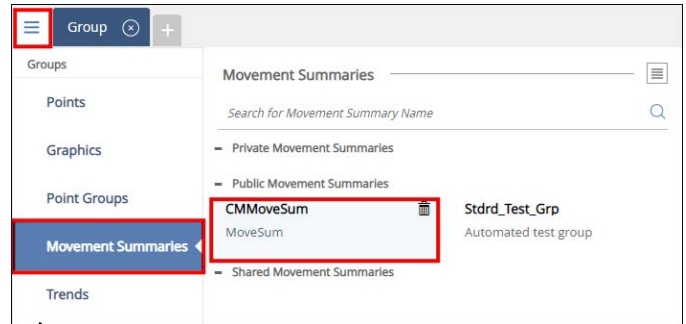


2 Setting Up a New Movement

Before setting up a new Movement Summary, ensure that you have created **Movement Nodes** (Tank Points) derived from the *Standard Movement Point Template*, as well as configured the *Movement Settings* for the **Movement Nodes** (Tank Points). You will not be able to record a movement in FuelsManager if these are not configured. If you have not set up a Movement or Movement nodes, see the procedure on the next section for more information.

Follow the procedure below to set up a Movement Summary:

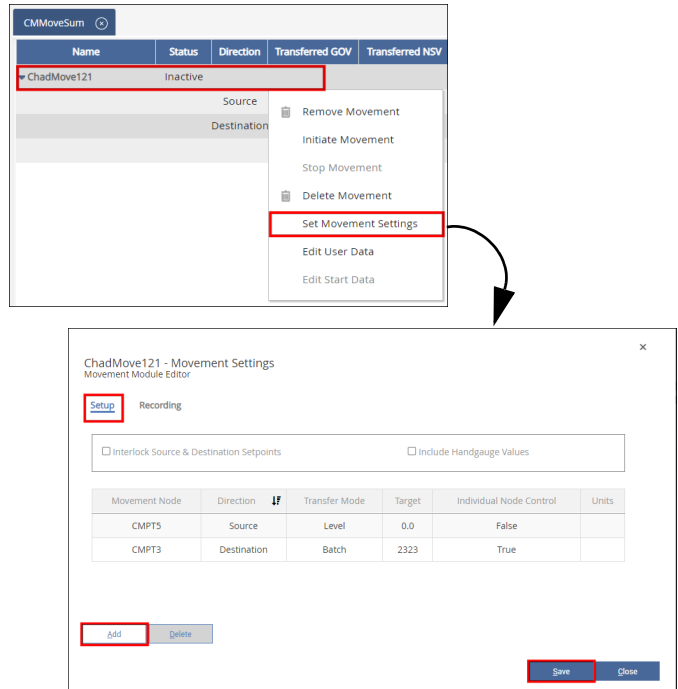
- 1) From the menu, select **Operations > Inventory Management > Operate**. The Operate page displays.
- 2) Hover over the **Task Groups menu**  icon. The Task Groups menu displays.
- 3) Select **Movement Summaries**. The Movement Summaries menu displays.
- 4) Use the **filter** to search a particular Movement Summary, if desired.
- 5) Select the **Movement Summary** you want to view. A tab opens and displays the details/view of the selected Movement Summary in the Operate workspace.
- 6) Right click on the empty **row** (typically the bottom row) and select **Add Movement** to define the Movement you want to include in the summary. The Movement List window displays.
You may filter the Movement list by Movement Type and/or Movement Category.
- 7) Select the **Movement** (Points) you want to include in the Movement Summary, and then click **Select**. The Movement List window closes, and the selected Movement (Points) are added as rows to the table.
You may click on a highlighted Movement (Point) to deselect it.
- 8) Click **Close** to close the Movement List window and go back to the Movement Summary. The selected Movement as well as the associated Movement Nodes (Tank Points) display in the table.



Configuring the Movement Settings

If the newly added Movement does not have associated Movement Nodes (Tank Points), you may add them from the Movement Summary. Follow the steps below to add Movement Nodes (Tank Points) to a Movement, as well as configure the Recording settings:

- 1) Right-click on the **Movement row** you created. A context menu displays.
- 2) Select **Set Movement Settings**. The Movement Module Editor window displays.
- 3) Ensure that you are on the **Setup** tab.
- 4) Add, edit, or delete a Movement Node.
See the [Setting Up Movement Nodes](#) section below.
- 5) Select the **Recording** tab.
- 6) Configure the Recording Settings for the Movement.
See the [Configuring Recording Settings for a Movement](#) section below for more information.
- 7) Click **Save** to save the Movement Settings.
- 8) Click **Close** to close the Movement Module Editor and go back to the Movement Summary.



Inserting Tag Columns

The following columns are shown by default when you open/view a Movement Summary:

Name	Transfer Status
Direction	Transfer Target
Status	Transfer Start Time
Transferred GOV	Transfer Time Remaining
Transferred NSV	Product
Transfer Mode	Created By

You can insert Tags as columns in a Movement Summary.

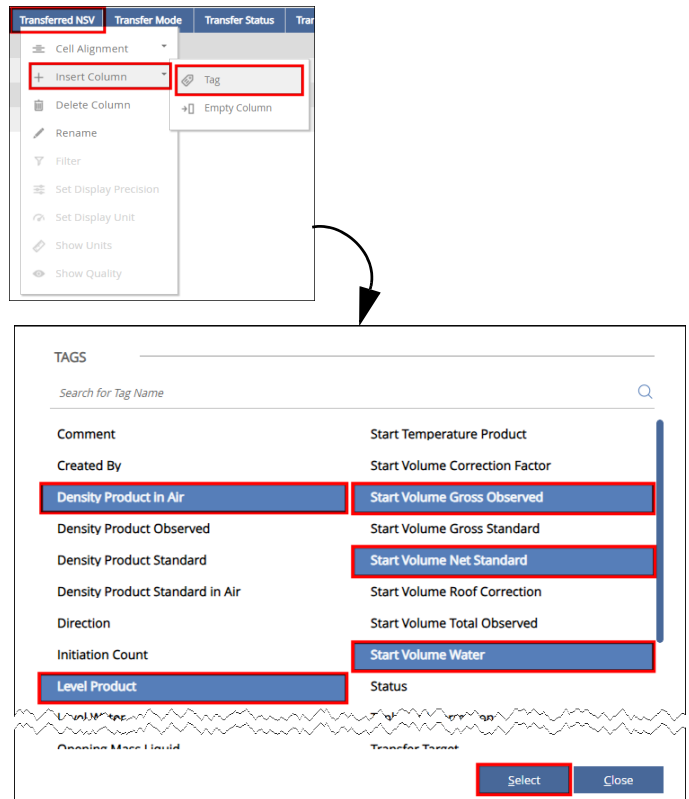
The procedure below assumes that you have a Movement Summary open in the Operate workspace. If not, view the Movement Summary before performing the procedure below.

Follow these steps to insert columns in the Movement Summary:

- 1) Right click on a **header row**. A context menu displays.
- 2) Hover over **Insert Column**, and select from the following:
 - **Tag** - allows you to insert the tag(s) you want to record. The Tags window lists all the tags available. Do one of the following:
 - Select the **Tag(s)** you want to insert, and then click Select. The Tags window closes, and the selected Tag(s) is inserted as a column to the table.

You may click on a highlighted Tag to deselect it.


- **Empty Column** - inserts a blank column.
Repeat to add more columns to the Movement Summary.
- 3) Click **Close** to close the Tags window and go back to the Movement Summary. The selected Tags display as columns in the table.
Columns are inserted to the left of the column you right clicked. There is no limit to the number of columns you can add to a Movement Summary.

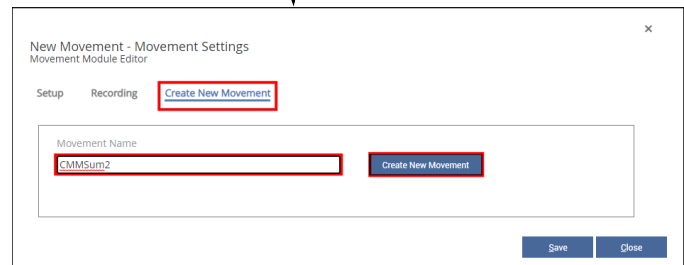
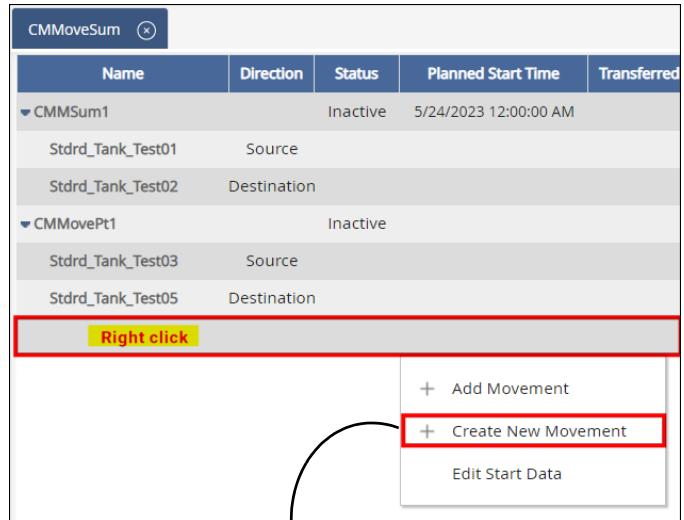


3 Creating a New Movement

You may create a Movement Point from the Movement Summary, as well as associate Movement Nodes (Tank Points).

Follow the procedure below to create a Movement Point from the Movement Summary:

- 1) From the menu, select **Operations > Inventory Management > Operate**. The Operate page displays.
- 2) Hover over the **Task Groups** menu  icon. The Task Groups menu displays.
- 3) Select **Movement Summaries**. The Movement Summaries menu displays.
- 4) Select the **Movement Summary** you want to view. A tab opens and displays the details/view of the selected Movement Summary in the Operate workspace.
- 5) Right click on the bottom empty row. A context menu displays.
- 6) Select **Create New Movement**. A window displays.
- 7) Ensure that you are on the **Create New Movement** tab.
- 8) Enter the **Movement Name** and click **Create New Movement**. The focus moves to the **Setup** tab.



Setting Up Movement Nodes

- 1) On the **Setup** tab, **Check or clear the Interlock Source & Destination Setpoints** check box.

When checked, this indicates that the **Source** and **Destination** set points are interlocked, such that if one set point value is changed, both are changed.

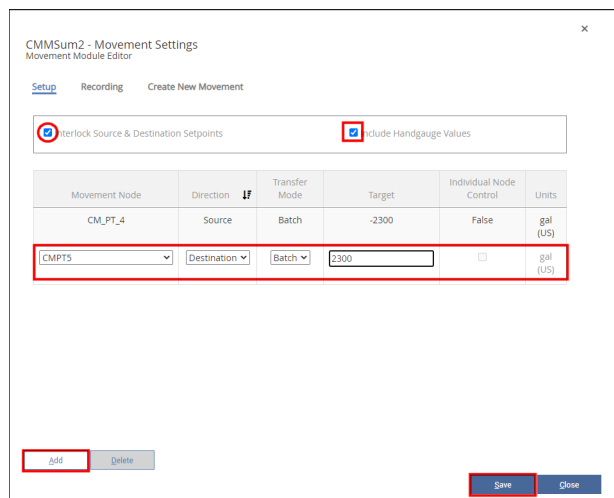
- When interlocked (checked) and you enter a **Source Target** of 30, when you add a **Destination Target**, 30 automatically shows as the **Target**. If you change the **Destination Target** to 50, the **Source Target** is automatically set to 50.
- When **not** interlocked (unchecked) and you change the **Source Target** to 30, the **Destination Target** remains the same.

- 2) **Check or clear the Include Handgauge Values** check box.

When checked, this indicates data from the hand gauge may be entered on the **Movement History** for this Movement Node (Tank Point).

- 3) Click **Add** to add a new Movement Node. A new row is added at the bottom of the table.
- 4) In the **Movement Node** dropdown list, select a **Movement Node** (Tank Point).

If there are no Movement Nodes (Tank Points) available in the dropdown, all Movement Nodes may have been previously assigned or you need to configure a new Tank Point (Point derived from the Standard Tank point template). See the **Points Configuration** help for more information on configuring a Point.



- 5) Select the **Direction** of the Movement Node:
 - **Source** - indicates this is the originating node.
 - **Destination** - indicates this is the target node.

FuelsManager allows adding of one Source to one or more Destinations, or multiple Sources to one Destination.

If Movement Nodes (Sources or Destinations) have been previously added or as you add Movement Nodes, FuelsManager resorts the table, showing Source rows first, then Destination rows.

- 6) Select the **Transfer Mode** type:
 - **Level** - allows you to set the final volume of product to move (transfer).
For example, if **Level** is selected and the Target is 10,000, when the destination node reaches 10,000 gallons, the movement stops. If the tank volume was at 8,000 gallons prior to starting the movement, this means 2,000 gallons was moved (transferred).
 - **Batch** - allows you to set the Target value of product to move (transfer). For example, if Batch is selected and the Target is 500, this means 500 gallons is the total product to move (transfer).

- 7) Enter the **Target** amount to move.
- 8) **Check** or **clear** the *Individual Node Control* check box.
When checked, indicates Individual Node Control is enabled, which means you can initiate or stop this node independent of the Movement. Displays **True** in the column.

When set to **True**, the controlling movement sets the mode and Target, but does not set the node as Active until the operator selects that node and activates it from the Movement Summary.
- 9) **Repeat** to add more movement nodes, then click **Save** to save the data in the Movement Module Editor.

Configuring Recording Settings for a Movement

- 1) Select the **Recording** tab.
- 2) Enter the **Order #** for this Movement.
- 3) **Check** or **clear** the *Send To Accounting* check box.
When checked, indicates a transaction will be created for this Order number and sent to Accounting. The transaction created (example: Receipt or Transfer) will depend on the transaction alias associated with the movement on the Movement Summary.
- 4) Enter a **Comment**, if desired.
- 5) **Check** or **clear** the *Set Pending Status* check box.
When checked, enables the Planned Start Time field and allows you to set it.
 - Enter or select the **Planned Start Time**.
- 6) **Check** or **clear** the *Delete After Completion* check box.
When checked, indicates that the Movement will be deleted from the Movement Summary when the movement is completed.
- 7) **Check** or **clear** the *Stop/Halt based on Zero Flow* check box.
When checked, the Movement stops when no product is flowing when the set *Zero Flow Hold Off Time* is exceeded.

Checking this field disables the *Use Control Tag Start/Stop* check box.
 - In the *Zero Flow Hold Off Time (min.)* field, enter the **number of minutes** to hold off stopping the movement when a zero product flow is detected.
This field is limited up to five digits. When this number of minutes is exceeded, the Movement is stopped.
- 8) **Check** or **clear** the *Start Time based in Non Zero Flow* check box.
When checked, indicates that the *Start Time* does not show when zero flow is detected. As soon as flow is detected, the *Start Time* is updated (shown).

Checking this field disables the *Use Control Tag Start/Stop* check box.

- 9) **Check** or **clear** the *Use Control Tag Start/Stop* check box.
When checked, indicates that the selected Tag controls when the Movement starts and/or stops. This field is available only if none of the Stop/Halt based on Zero Flow or the Start Time based in Non Zero Flow check boxes are checked.
 - Select the **Control Tag** from the list.
- 10) In the *Ticket Name* field, select the **name of the report** you want to print for this Movement.
- 11) Select the **Printer** where the report is printed.
If the Printer is not listed, you may need to configure it through Windows.
- 12) Click **Save** to save the Recording Settings, and then click **Close** to close the Movement Module Editor and go back to the Movement Summary.