SESSION 7.2
TUFMAN Licensing Setup

First TUFMAN Training Workshop (TTW-1)
3-7 December 2012
SPC, Noumea, New Caledonia

Presentation outline

- Licensing setup in the TUFMAN profile
- 'License profiles' (License types)
  - What they are and what they represent
  - The license profile screen
  - How to setup a license profile
- Setting up a license in TUFMAN
  - The requirements
  - The license certificate
- Receipting/fees in TUFMAN
  - What it is and why do it?
  - Brief overview of how it works and how to use it

INTRODUCTION

- Licensing is a complex and very important element of TUFMAN

- Is central to other data and links them together

- Customisable to cater for differences among countries
  - License numbering
  - Different fees
  - Different certificates

- Differences handled by:
  - The TUFMAN profile
  - TUFMAN 'License profiles' to define license types
  - Custom license certificates

License Setup in TUFMAN profile

License Profiles

- Flexible setup

- What they are and what they represent:
  - Each profile defines a 'license type'
  - Need at least 1 license profile for each of the following:
    - At least one for each license ownership type (domestic, foreign, and joint venture)
    - At least one for each license numbering system
    - At least one for each license certificate

License Profiles

- Example

Ref	Description	Ownership	License number example	License certificate
A	Domestic longline	Domestic	D-1234-LL-01	Domestic certificate
B	Domestic purse seine	Domestic	D-1234-PS-01	Domestic certificate
C	Foreign JP licenses	Foreign	F-1234-LL-01	Special JP certificate
D	Other foreign licenses	Foreign	F-1234-LL-01	Foreign license cert
E	Joint venture licenses	Joint venture	JV-1234-LL-01	JV certificate

- Profile Setup (one possibility)

License profile ID	Description	For license refs	Comments
1	Domestic licenses	A and B	A and B have the same ownership, license number format, and certificate, so can be handled by 1 license profile
2	Foreign JP	C	C and D are almost the same, but 3 has a different license certificate so must have its own license profile
3	Foreign	D	See above
4	Joint venture	E	Different ownership, certificate and license number format to all of the others

License Profiles

- Where are they used?

- Agreements:

- Licenses

License Profiles

- License profile screen
- 'Admin->General Admin->license setup'
- Summary of existing license profiles
- Add new / delete / edit existing

WARNING: Changes must be made with extreme caution because they can have serious effects on the database if not done properly. Never make changes without consulting SPC beforehand.

ID	Ownership	Gear	Description	Period type	Period	#Agr	#Licenses
4	Domestic		Domestic 12 month license	Fixed Period	12	9	75
6	Foreign		Foreign 12 month license	Fixed Period	12	25	278

Add new

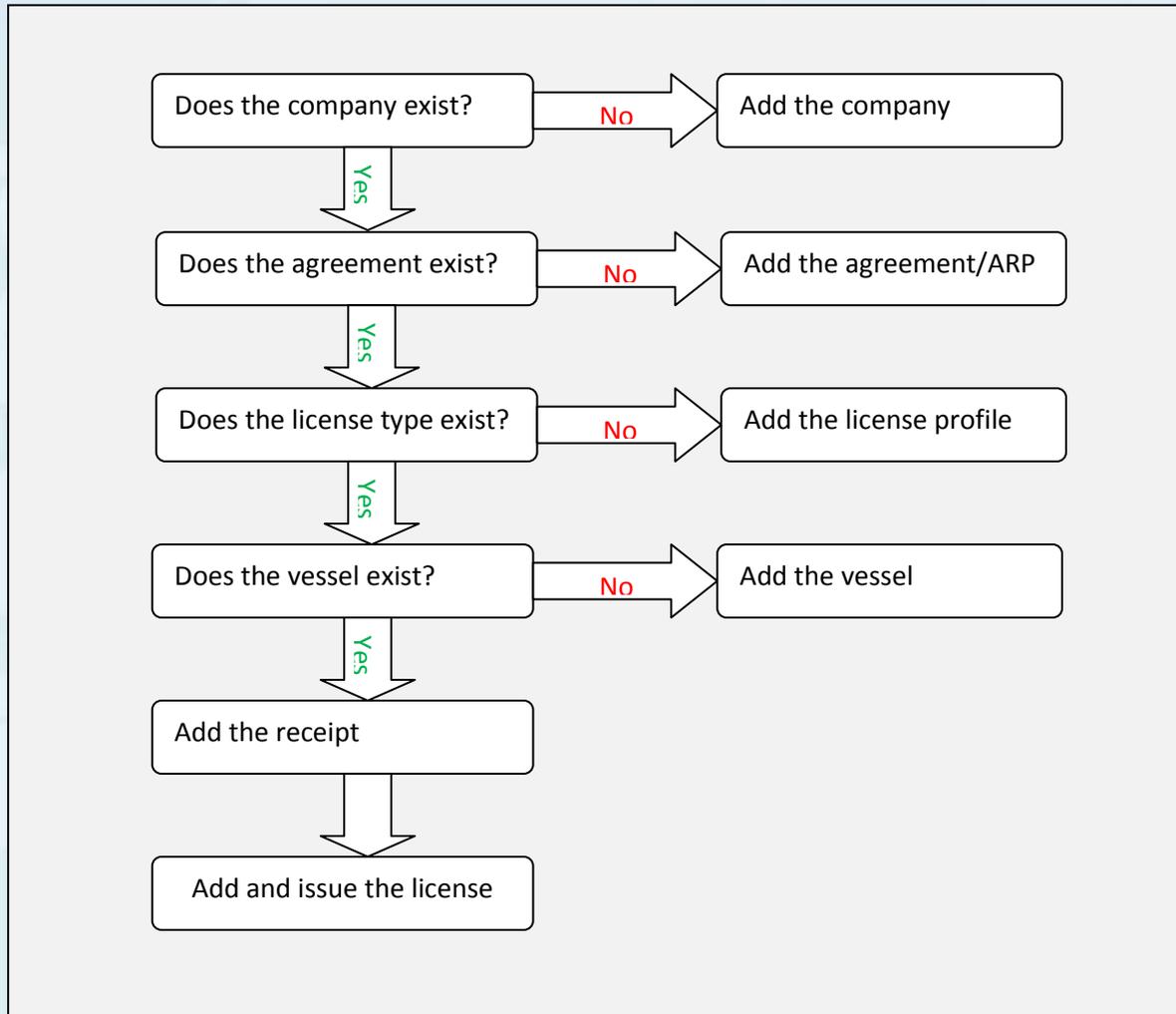Delete

Setup a License Profile

- License profile details

			ID	4
Full description of license	Domestic 12 month license		Co ID	FM

Full description of license: Domestic 12 month license
Short description of license:
Ownership: Domestic
License period type: Fixed Period
License period: 12
Gear:
license mask: FM[YY-ARP]-[COID][VID][GR2]-[SEQVARP]
SequenceGroup: 1
License certificate: licRep_FMCert_Domestic
License period units: Days
Enter license holder: ☐
Payment required: ☑
Registration required: ☐
Activation required: ☐
Comments:

Fees applied
☐ Activation fee
☐ Registration fee
☐ Observer fee
☑ License fee
☐ Goods and services fee
☐ Extra vessel fee
☐ Value of Catch fee
☐ Access fee
☑ Other fee
Other fee description: Offload Fees

- Modify with extreme care and with advice from SPC

Setup a License

- Basic requirements

The License Certificate

Generated one of 2 ways:

- As a Microsoft Access Report
  - Not editable
  - Cannot be modified
  - Can be printed to PDF

- From a Word document template
  - Easier to change
  - Can be modified yourselves
  - Can be edited before printing
  - Can save document
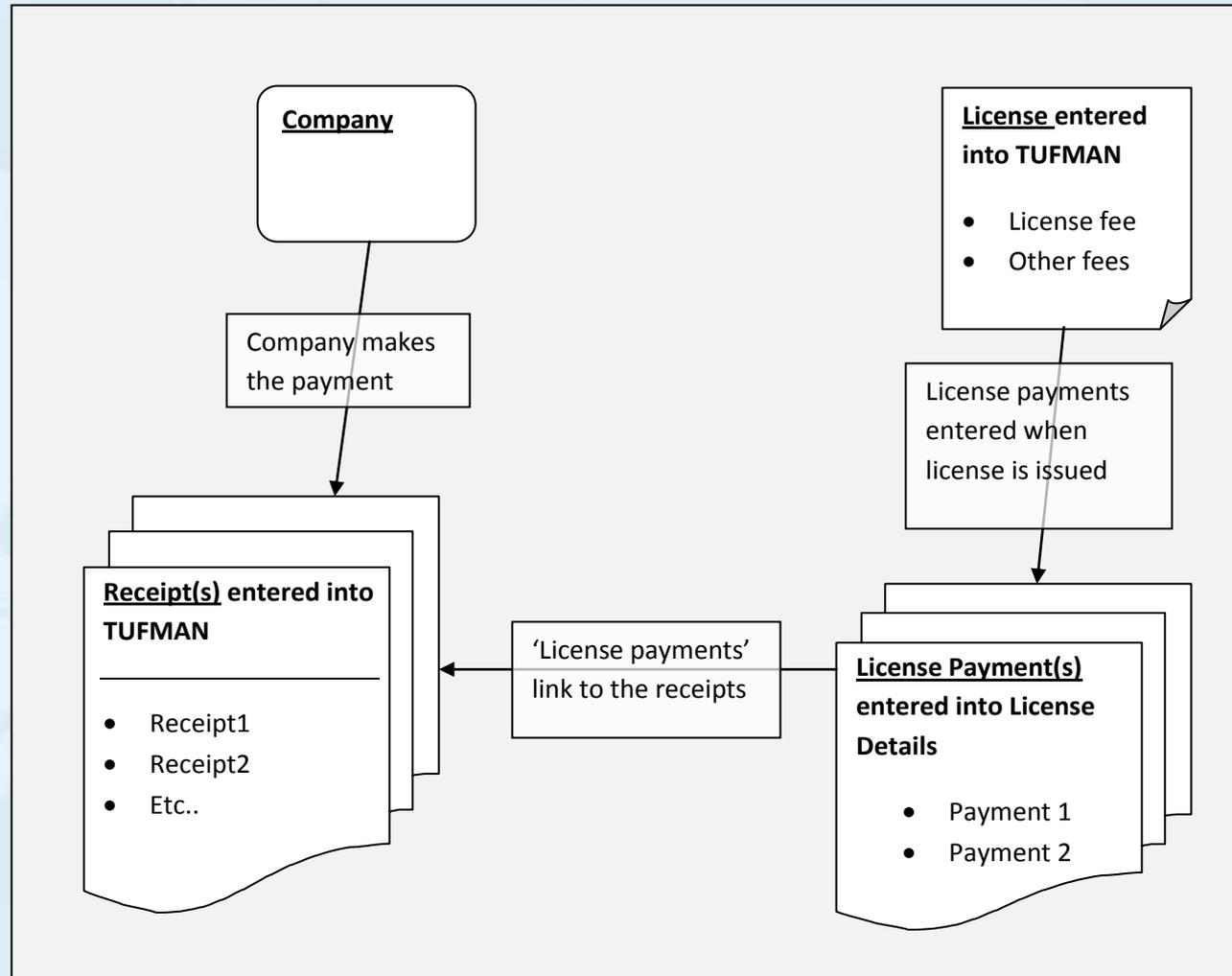
Receipting / Fees in TUFMAN

What it is and why do it?

- Keep track of licensing fees and payments

- Revenue reports, e.g. Total license revenue for a year, by gear or by flag

- Reports in local currency

- Vital to keep fees and payments 'reconciled' , or balanced, in the system for the reports to be accurate

Receipting / Fees in TUFMAN

Overview:

Receipting / Fees in TUFMAN

Example:

- License with license fee, registration fee, and observer fee:

License Fee	Registration Fee	Observer Fee
$1000	$200	$50

- Paid for by 2 separate payments. 'Payment1' and 'Payment2' are the reference numbers for the payments.

Payment 1	$1200	For license and registration fee
Payment 2	$50	For observer fee

Entering into TUFMAN

- Enter company, agreement, vessel etc if required
- Enter the 2 payments under receipting, as separate records

	Company	Date rec'd	Remittance Ref	Foreign amount	Currency	Local amount	Complete	Balanced	Comments
Receipt Summary									
▶	FM Company 14	07-Nov-12	Payment1	$ 1,200.00	USD	$1,200.00	Yes	No	License and reg fee
	FM Company 14	07-Nov-12	Payment2	$ 50.00	USD	$50.00	Yes	No	Observer fee

- Enter the license and ensure that the fees are entered correctly, with $1000 for the license fee, $200 for the registration, and $50 for the observer fee:

Applicable Fees:

Currency:	USD
license fee:	$ 1,000.00
Observer fee:	$ 200.00
Registration fee:	$ 50.00
TOTAL FEES DUE:	**$ 1,250.00**

- While still entering the license, enter the payment information matching payment1 and payment2 to the correct fees, as below

Payments:

Note that currency of payment must match fee currency

Receipt	Pmt type	Amount	CUR	Local amount	Comments
Payment1	License Fee	1000	USD	$1,000.00	
▶ Payment1	Registration Fee	200	USD	$200.00	
Payment2	Observer Fee	50	USD	$50.00	
*					
Totals		1250		$1,250.00	