Cloud Fleet Manager

MANUAL

CFM CERTIFICATES

2023-06-16

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1. About This Guide

This user guide provides an introduction to CFM Certificates and describes how you can leverage the application to meet your business needs. CFM Certificates allows you to manage your certificates and surveys. You can then assign these to specific vessels and departments. Additionally, CFM Certificates provides you with an overview of certificates and surveys that need your attention.

The app consists of the following tabs:

· **Dashboard**

· **Vessel**

· **Settings**

· **Reports**

> **NOTE**
> If you cannot access the **Certificates** tile from Cloud Fleet Manager (CFM), please contact your system administrator to assign the relevant permissions to your users in **CFM Users**.

This user guide describes the features and functions available to a user with full access to the application. If you're expecting rights that your user currently doesn't have, get in contact with your system administrator.

2. Initial Setup

Before you can start to use CFM Certificates certain settings have to be made.

1. Create users for CFM in CFM Users.
2. Assign the users the relevant permissions roles for CFM Certificates.
3. Define global settings.
4. Set up notifications (optional).

2.1. Global Settings

Global settings are applied to your entire organization and the associated fleet. These settings can only be managed by Hanseaticsoft. Contact our Helpdesk to request the (de-)activation of the available specifications to meet your organization's requirements.

The following global settings are available:

- **Disable Download of Certificates in CFM Portal**

  Activating this setting prevents users without access to CFM Certificates from download vessel certificates via CFM Portal > **Fleet** > **Vessel** > **Certificates**.

- **Send Documents Automatically to Vessels**

  Activating this setting automatically sends all attachments to the relevant vessels. Captains on board are therefore relieved from requesting individual attachments.

3. Glossary

This glossary provides users with a reference tool to help them understand and navigate the technical terminology, abbreviations, acronyms, and special characters used in this document. It supports ensuring that technical terms are clearly and consistently defined and explained. As a result, users and readers have a consistent definition and shared understanding of the terms used throughout the application.

Table 1. Glossary

| Term	Description
Annual survey	Refers to the interval in which a certificate is surveyed. In this case, the certificate is surveyed once a year.
Certificate group	Refers to a collection of certificate types that are assigned to a group.
Certificate type	Refers to an individual certificate.
Intermediate survey	Refers to the interval in which a certificate is surveyed. In this case, the certificate is surveyed bi-annually.
Periodical survey	Refers to the pattern in which a certificate is surveyed. In this case, the certificate is surveyed in regular, repeating intervals.
Vessel relations	Refers to the assignment of a certificate type to a specific vessel.
Warning period -	Refers to the time period **prior** to the expiry date of a certificate type when it will be color-coded in yellow and marked as *expires soon*. ***Example***: • Certificate type: Rescue boat registry • Expiry date: 01.08.2023 • Warning period -: 1 month • Marked as *expires soon* on: 01.07.2023
Warning period +	Refers to the time period by which a certificate can exceed its initial expiry date before it is color-coded in red and marked as *expired*. ***Example***: • Certificate type: Rescue boat registry • Expiry date: 01.08.2023 • Warning period +: 3 months • Marked as *expired* on: 01.11.2023

4. Process Visualization
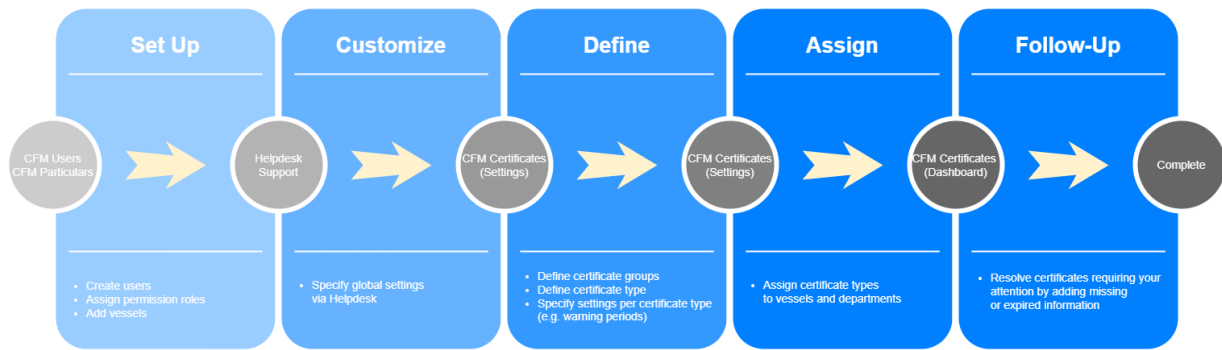
5. General Features

The following general features are available from the main navigation bar in CFM Certificates.

- **Navigation**

  You can directly navigate to other CFM apps by choosing the CFM logo (⚙) from the main navigation bar. Then choose the respective app that you want to launch and the app automatically opens in another tab.
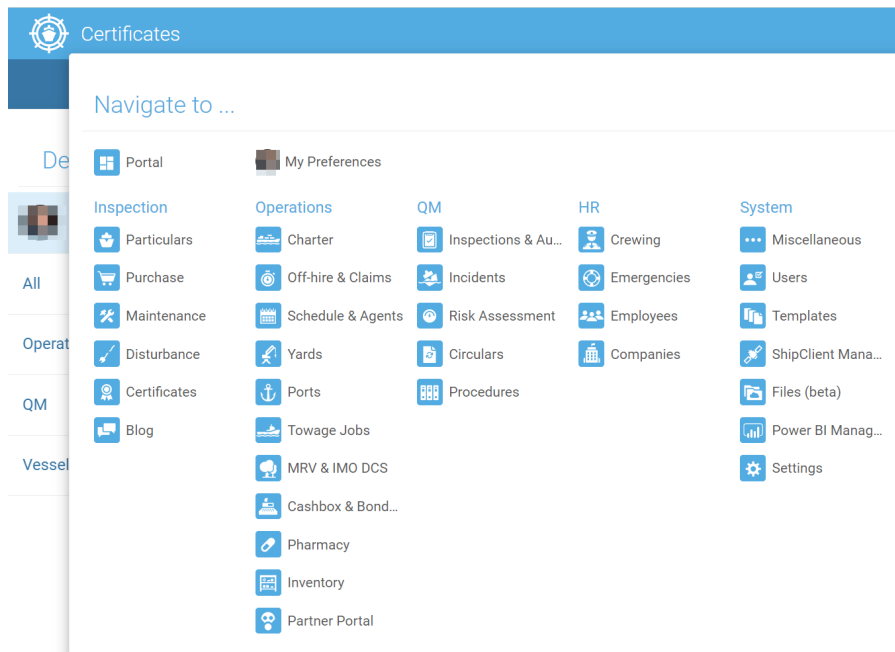
- **Notifications**

  The 🔔 **bell** icon indicates whether any notifications from the current app and other apps within CFM are available. This allows you to get relevant information without the need to open all apps.

  Choose the ⚙ **cogwheel** icon to define for which applications and their actions you want to receive notifications.

- **User Menu**

  To log out of CFM Certificates, choose the user avatar and then **Logout**.

6. Dashboard

The Dashboard in CFM Certificates provides you with an overview of certificates and surveys that need your attention.

The tab consists of the following cards:

- **Departments**

  Lists all departments certificates and surveys that require attention in a chronological order as well as the amount of certificates. In addition, these values are differed per status, indicating a color code. This color code is described at the end of this chapter.

  Select a specific department to display only its certificates and surveys. You can also choose one of the values to filter your results even further.

- **Expiring or Expired Certificates**

  Lists all expiring or expired certificates as well as the amount of certificates that require attention, sorted by vessel. You can expand a vessel and see all applicable certificates for this vessel. A color coding indicates the status of a single certificate. The vessel status is determined by the status of the worst certificate.

  The total amount of all certificates is displayed at the top of the card.

  > 📝 **NOTE**
  > Open a certificate per double click to apply necessary adjustments and resolve the issue.

- **Annual Surveys**

  Lists all annual surveys as well as the amount of annual surveys that require attention, sorted by vessel. You can expand a vessel and see all applicable annual surveys for this vessel. A color coding indicates the status of a single annual survey. The vessel status is determined by the status of the worst annual survey.

  The total amount of all annual surveys is displayed at the top of the card.

  > 📝 **NOTE**
  > Open an annual survey per double click to apply necessary adjustments and resolve the issue.

- **Intermediate Surveys**

  Lists all intermediate surveys as well as the amount of intermediate surveys that require attention, sorted by vessel. You can expand a vessel and see all applicable intermediate

surveys for this vessel. A color coding indicates the status of a single intermediate survey. The vessel status is determined by the status of the worst intermediate survey.

The total amount of intermediate surveys is displayed at the top of the card.

> **NOTE**
>
> Open an intermediate survey per double click to apply necessary adjustments and resolve the issue.

• **Periodical Survey**

Lists all periodical surveys as well as the amount of periodical surveys that require attention, sorted by vessel. You can expand a vessel and see all relevant periodical surveys. A color coding indicates the status of a single periodical survey. The vessel status is determined by the status of the worst periodical survey.

The total amount of periodical surveys is displayed at the top of the card.

> **NOTE**
>
> Open a periodical survey per double click to apply necessary adjustments and resolve the issue.

The following color code is applied to any available entry:

• Yellow - The certificate expires soon

• Orange - The certificate expires soon

• Red - The certificate expired already

• Purple - No expiry or survey date was defined

The following general features are available on this tab:

- Activities

  Choose **Activities** in the upper right-hand corner to display the change history in a timeline. The timeline includes all changes made by other users to all certificates on all vessels. To see more details on the changes made, simply choose **Show Changes** at the end of each entry. To load more activities, choose **Load More** at the end of the list.

- Comments

  Choose **Comments** in the upper right-hand corner to display comments related to the certificates of all vessels.

7. Vessels

The Vessels tab provides on overview of certificates per vessel. The vessels on the left hand panel are sorted according to the responsibilities of the logged-in user. The certificates are sorted by certificate group and can be edited or exported, if desired.

> **NOTE**
> You can create new certificate groups under **CFM Certificates** > **Settings**. For more information, see Create Certificate Group [18].

You can filter the vessels on the left hand panel, by entering a name at the top of the list. Choose one vessel to view the correlating certificates.

You can search certificate types by entering either the name, code or unique tracking number at the top of the list. Further, you can utilize the filter option ⇂ to narrow your results down:
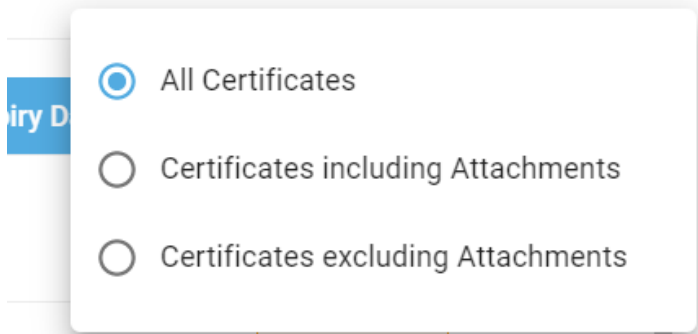
The following information per certificate is displayed, by default:

• Color code

> 📝 **NOTE**
> The following color code indicates the status of each certificate:
>
> • Green - The certificate is valid and does not require attention.
> • Orange - The certificate's expiry date or annual survey date, respectively intermediate survey date is reached soon.
> • Red - The certificate's expiry date or annual survey, respectively intermediate survey is exceeded.
> • Purple - The certificate lacks an expiry date or annual survey date, respectively intermediate survey date.

• Name
• Code
• Unique Tracking Number
• Issue Date
• Assign Date
• Expiry Date
• Next Annual Survey
• Next Intermediate Survey
• Next Periodical Survey
• On Board
• In Office
• Is Electronic
• Flag State
• Attachment

> ⚲ **TIP**
>
> You can configure whether a missing attachment triggers a warning. For more information, see Create Certificate Types [19].

However, you can customize the displayed information. To do so, choose this ☰ list icon above the table and select the desired checkboxes to include their information.

The following general features are available on this tab:

- **Activities**

  Choose a certificate and subsequently **Activities** in the upper right-hand corner to display the change history in a timeline. The timeline includes all changes made by other users to the currently selected certificate. To see more details on the changes made, simply choose **Show Changes** at the end of each entry. To load more activities, choose **Load more** at the end of the list.

- **Comments**

  Choose a certificate and subsequently **Comments** in the upper right-hand corner to display or add comments. To add a comment, simply choose + **Add Comment**, articulate your comment and finalize by choosing **Save**.

- **Details**

  Choose a certificate and subsequently **Details** in the upper right-hand corner to display basic information concerning this certificate, such as the name, whether it has an annual or intermediate survey, remarks and additional information.

- **Edit**

  Choose a certificate and subsequently **Edit** above the table to edit information, such as issue or expiry date. For more information, see Edit Certificate Types [14].

- **Export**

  Choose a certificate and subsequently Export above the table. You can either export a **Certificate List** or a **Certificate Index List**.

7.1. Edit Certificate Types

To edit an existing certificate type, proceed as follows.

1. Launch CFM Certificates from your CFM instance.
2. Open the **Vessels** tab, choose a certificate from a vessel, and select **Edit**.
3. Apply your desired changes.

> ▨ **NOTE**
>
> You cannot apply changes to the name or code of the certificate.

4. Finalize your settings by choosing **Save**.

8. Reports

On the Reports tab, all certificates that have passed their expiry date, the next annual survey or the next interim survey are provided. Certificates that do not have an expiry date in any form are not displayed.

Choose an entry from the list, which opens a dialog window that allows you to apply necessary changes to resolve the issue. For more information, see Edit Certificate Types [14].

The table contains the following information:

• Vessel

Lists the name of the vessel the expired certificate was assigned to.

• Group

Lists the certificate group the expired certificate is assigned to.

• Name

Lists the name of the expired certificate.

• Code

Lists the expired certificates code, if given.

• Type

Lists the type of expired certificate. It is either **Certificate** or **Equipment**.

• Issue Date

Lists the date when the expired certificate was issued.

• Assign Date

Lists the date when the audit for the expired certificate was conducted.

• Expiry Date

Lists the date when the certificate expired or will expire. This depends on which date of the certificate was exceeded.

• Last Annual Survey

Lists the date of the last annual survey for the expired certificate.

- Next Annual Survey

  Lists the date of the next annual survey for the expired certificate.

- Last Intermediate Survey

  Lists the date of the last intermediate survey for the expired certificate.

- Next Intermediate Survey

  Lists the date of the next intermediate survey for the expired certificate.

- Last Periodical Survey

  Lists the date of the last periodical survey for the expired certificate.

- Next Periodical Survey

  Lists the date of the next periodical survey for the expired certificate.

- On Board

  Specifies, whether the expired certificate is available on board of the respective vessel.

- In Office

  Specifies, whether the expired certificate is available in the office for the respective vessel.

- Download / Send Email

  The attachment icon allows you to specify, whether you want to download your certificate or send it via Email.

The following general features are available on this tab:

- Filter

  You can filter and customize the table concerning the following conditions:

  - Vessels

  - Expiry in Months

  - Certificate Groups

  - Certificate Types

  - Expiry Date

  - Next Annual Survey

  - Next Intermediate Survey

  - Disabled Error Status

  - Missing Status

- Export

  Create an export as an Excel file.

9. Settings

The Settings tab provides an option to add new and edit existing certificate groups and certificate types as well as to assign these certificate types to specific vessels and departments.

You can search for a specific certificate type, by providing its name as a search term above the list on the left-hand side.

9.1. Create Certificate Group

To create a new certificate group, proceed as follows.

1. Launch CFM Certificates from your CFM instance.
2. Open the **Settings** tab, select this ＋ plus icon and select **Certificate Group**.
3. Provide the requested information.
   - Name
   - Remark
4. Finalize your settings by choosing **Save**.

Add Certificate Group ⊗

Name *

Flag State Certificates

Remark

Cancel Save

9.2. Create Certificate Types

Certificate types are assigned to certificate groups and subsequently assigned to vessels and departments.

TIP

You can also copy an existing certificate type and thus are not required to manually create your certificates. This will create an exact replica of the copied certificate. This includes general settings as well as vessel relations and departments.

To copy an existing certificate type, navigate to the desired certificate in the **Settings** tab and then to the **General** card. Select the ⋮ three-dot menu and choose **Copy certificate**. The name will be based on the copied certificate and appended with **(Copy)**.

Furthermore, you can edit a certificate and assign the changes to your desired vessels. To do so, navigate to the desired certificate in the **Settings** tab and then to the **General** card. Select the ⋮ three-dot menu and choose Batch edit. Apply the necessary changes to the certificate and select the checkboxes of vessels to which the edited certificate will be applied. Confirm your changes with **Save**.

To create certificate types, proceed as follows.

1. Launch CFM Certificates from your CFM instance.
2. Open the **Settings** tab, select this + plus icon, and select **Certificate Type**.

> **NOTE**
>
> You can also edit or delete certificate types. To edit a certificate type, simply apply your necessary changes and confirm with **Save**. To remove a certificate type from the system, choose **Delete** and confirm the warning dialog. Be cautious, since this action is irreversible!

3. Provide the requested information.

- **Certificate Name**

  Enter a meaningful name for the certificate.

- **Code**

  Enter an optional code, such as abbreviations for this certificate.

- **Certificate Group**

  Select the certificate group for this certificate from the drop-down menu.

  > **NOTE**
  >
  > In case the applicable certificate group is not available, follow these instructions from Create Certificate Group [18] to create a new one.

- **Is Equipment**

  Select this checkbox, if the certificate type belongs to equipment. You will recognize such certificates later on based on this ⚙ cogwheel icon.

- **Is Specific to Port**

  Select this checkbox, if the certificate type is for a specific port.

- **Can Expire**

  Select this checkbox, if the certificate can expire. Selecting this checkbox requests follow-up information:

  - **Warning Period -/+**

    Specify the warning period.

  - **Time Period for Intermediate Survey**

    Select the time period of the warning period from the drop-down menu.

- **Has Annual Survey**

  Select this checkbox, if this certificate type has an annual survey. Selecting this checkbox requests follow-up information:

  - **Warning Period -/+**

    Specify the warning period.

  - **Unit**

    Select the unit of the warning period from the drop-down menu.

- **Has Intermediate Survey**

  Select this checkbox, if this certificate type has an intermediate survey. Selecting this checkbox requests follow-up information:

- **Warning Period -/+**

  Specify the warning period.

  - **Unit**

    Select the unit of the warning period from the drop-down menu.

- **Has Periodical Survey**

  Select this checkbox, if this certificate type has is surveyed in periodical periods. Selecting this checkbox requests follow-up information:

  - **Warning Period -/+**

    Specify the warning period.

  - **Unit**

    Select the unit of the warning period from the drop-down menu.

- **Has Assign Date**

  Select this checkbox, if the certificate has a specific assign date. The assign date refers to the date on which the surveyor conducted the audit.

- **Attachment Missing Warning**

  Select the checkbox to display a warning in the **Attachment** column of your vessels for certificates of this type that do not have an attachment.

- **Is Specific to Flag State**

  In case the certificate type is for a specific flag state, select this from the drop-down menu.

- **Excluded from Partner Portal**

  Select this checkbox, if you want to exclude this certificate type being displayed in the partner portal.

- **Remark**

  Provide any additional remarks to this certificate type.

4. Finalize your setting by choosing **Save**.

9.2.1. Assign Certificate Types to Vessels

Assigning a certificate type to a vessel makes it available on board and allows CSM users to manage these.

To assign a certificate type to a vessel, proceed as follows.

1. Launch CFM Certificates from your CFM instance.
2. Open the **Settings** tab and select a certificate type from the left hand panel.
3. Scroll to the **Vessel Relations** table and select the checkbox in the very last column of your desired vessel to assign the certificate type.

> **NOTE**
> Unselect a checkbox to remove a certificate type from a vessel.

The following filter options are available above the table:

- **Show all vessels**

- **Show active vessels only**

- **Select Vessel Roles**

    - **All**

    - **Status**

    - **Types**

    - **Sub Types**

    - **Engine Maker**

    - **Flag State**

    - **User Team**

    - **Classification Society**

- **Deselect All**

9.2.2. Assign Certificate Types to Departments

Assigning certificates to a department adds them to the statistics in the Dashboard tab under Departments. In addition, these certificates are made available in the **Portal** under **Fleet** > **Vessel** > **Certificates** and in the **Partner Portal**.

To assign certificate types to departments, proceed as follows.

1. Launch CFM Certificates from your CFM instance.

2. Open the **Settings** tab and select a certificate type from the left hand panel.

3. Scroll to the Departments table and select the checkboxes of your desired department to assign the certificate type.

NOTE

Unselect a checkbox to remove a certificate type from a department and its statistics.

10. Revision History

The revision history provides you with a table, containing a summary of applied changes to the user guide based on its corresponding module. The user guide's version stamp is available to you in its file name. The revision history gives you the gist of minor and major changes rather than explaining everything in detail. Refer to the **What's New** section for our daily features, updates, and bug fixes. You can also reach out to our Helpdesk if you come across any uncertainties or questions.

Semantic versioning will be applied and uses a three-part version number (Major.Minor.Patch). Significant changes are indicated by an increased major number; new, less significant adaptions increment the minor number and all other updates increase the patch number.

Version	Changes	Date of Publication	Author
v2.0.0	• Implementation of 'Periodical Survey' for certificates • Added global settings • Added a glossary • Added a process visualization • Rearranged chapters	16.06.2023	Ricardo da Costa Lima
v1.0.1	• Setting to receive a warning if a certificate lacks an attachment is available	12.10.2022	Ricardo da Costa Lima
v1.0.0	• Initial creation of user guide	08.04.2022	Ricardo da Costa Lima