Cloud Fleet Manager

MANUAL

CFM SCHEDULE & AGENTS

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A member of the Lloyd's Register group

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1. About This Guide

This user guide provides an introduction to CFM Schedule & Agents and describes how you can leverage the application to meet your business needs.

CFM Schedule & Agents allows you to define and manage schedules, as well as agents to make these information subsequently available to all necessary parties within the Partner Portal, as well as the Portal.

The app consists of the following tabs:

- **Dashboard**
- **Schedule**
- **Agents**
- **Power BI**

> **NOTE**
> If you cannot access the **Schedules & Agents** tile from the Cloud Fleet Manager (CFM), please contact your system administrator to assign the relevant permissions to your user 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 Schedule & Agents, certain settings have to be made:

1. Create users for CFM in CFM Users.
2. Assign users the relevant permission roles for CFM Schedule & Agents.
3. Set up notifications (optional).

2.1. Schedule & Agents - 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:

1. **When to Send Schedules to CSM Blog** (default: Inactive)

   Activate this setting to define the days of the week on which the schedules of all vessels in your fleet will be made available to each other in CSM Blog. In addition, the scheduled master and chief are provided as well.

   Otherwise, the schedules of the vessels in your fleet will not be made available to each other.

2. **Automatically Send Schedules to CSM Blog** (default: Inactive)

   Activate this setting to automatically make all schedules available to your vessels in CSM Blog.

   Otherwise,

3. **Schedule Sender's UserID** (default: Inactive)

   Activate this setting to define which user ID is displayed on the created blog entries in CSM Blog.

   Otherwise, no user ID will be displayed.

4. **Copy to Schedule Template**

   Customize the information that is included when the copy to clipboard option is used. The option is to your avail via CFM Portal > **Fleet** > [Vessel] > **Schedule**.

   By default, the template provides the following pieces of information:

   • Vessel

   • Port

   • ETA

   • ETD

- TOA
- TOD
- Agent Name
- Address
- Main contact
- Communications

3. Process Visualization

The chart below visualizes a simplified workflow in CFM Schedule & Agents.
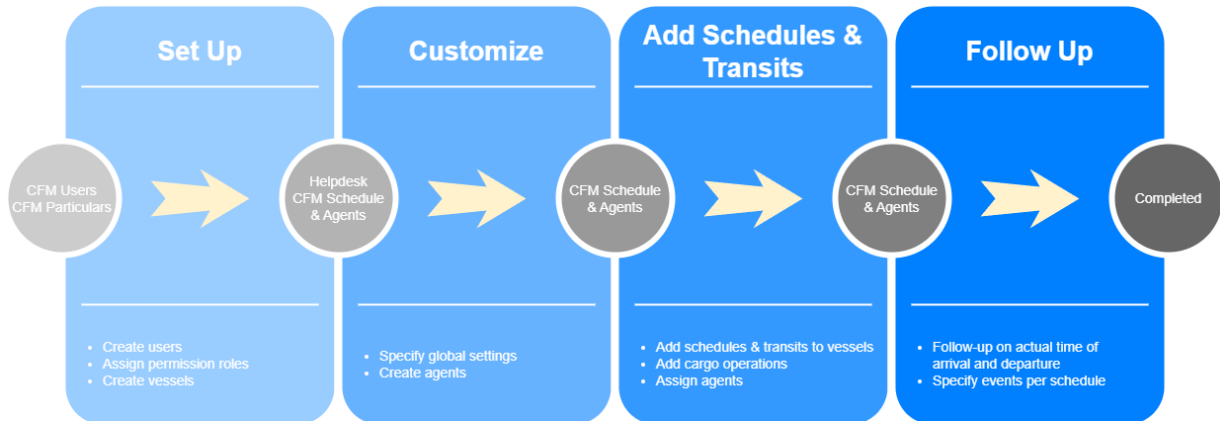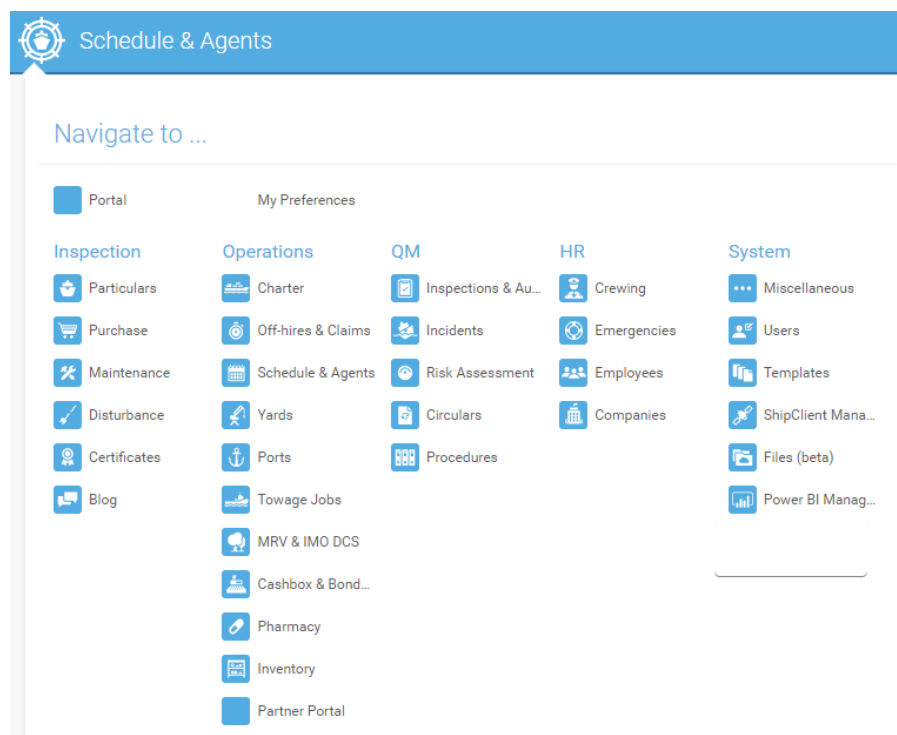
4. General Features

The following general features are available from the main navigation bar in CFM Schedule & Agents.

- **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.

- **What's New**

  Choose the 🎁 **gift** icon to get an overview of new features, improvements, and bug fixes that were released since the last time you checked. The number displayed in red indicates how many new features, improvements, and bug fixes were released.

  A flyout window allows you to navigate to the timeline of updates for all CFM applications, as well as to the changelog and module history of CFM Schedule & Agents.

- **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**

  Select from the drop-down menu vessels of which responsibility type are displayed to your user.

  To log out of CFM Schedule & Agents, choose the user avatar and then **Logout**.

5. Dashboard

The dashboard tab provides an overview of vessels and agents that may require your attention, as well as a log of respective activities, which allows you to view the added or modified information. Further, visualized statistics are provided to easily determine the most scheduled ports, agents, bunker ports, and crew change ports.
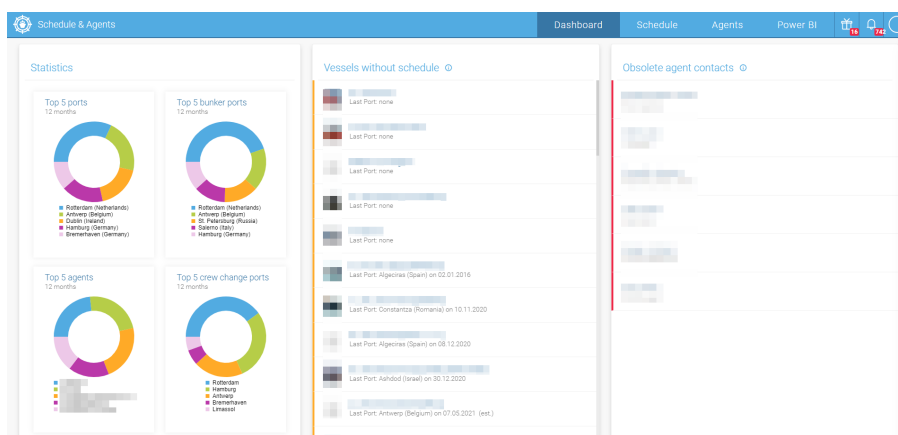

The tab consists of the following cards:

- **Statistics**
- **Vessels without schedule**
- **Deviating ISPS Security Levels**
- **Upcoming Bunkering**
- **Obsolete agent contacts**
- **Schedule activities**
- **Agent activities**

5.1. Statistics

The statistics card provides your visualised top 5 for multiple categories in a donut chart. Thus, allowing you to easily assess performance and determine potential measurements.
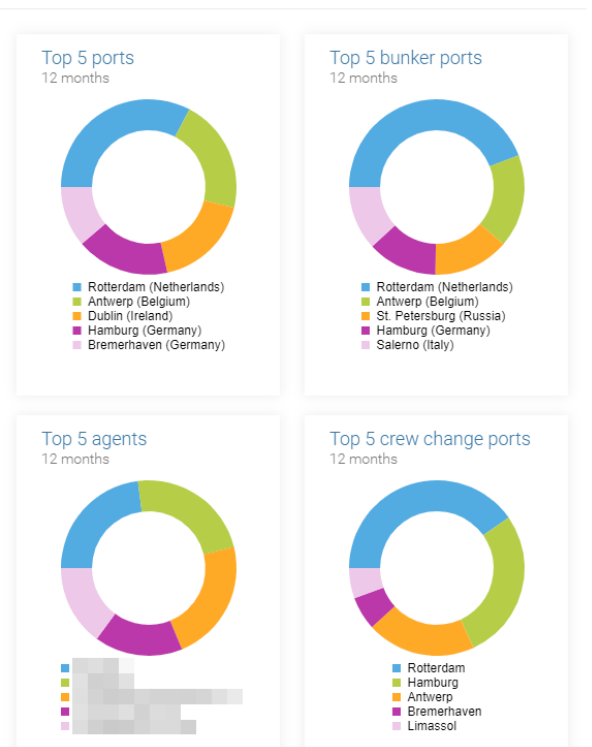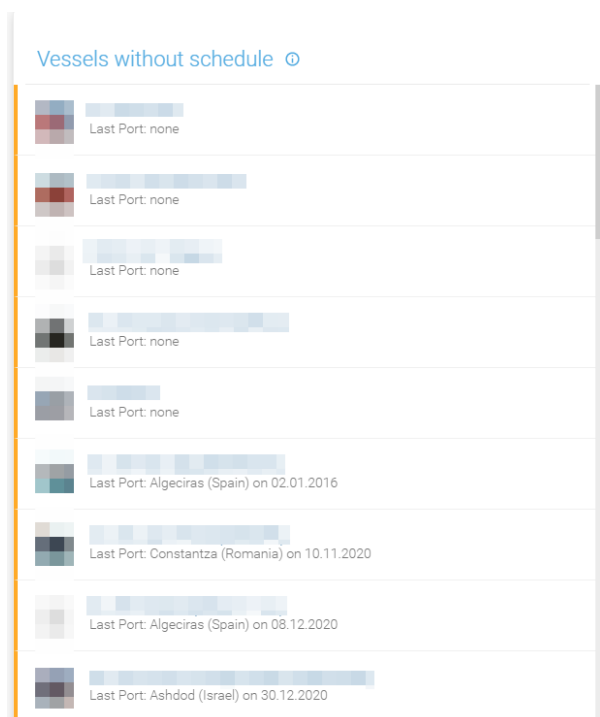
The following statistics are provided:

- Top 5 ports

  Displays a donut chart that captures the 5 most used ports for your entire fleet within the last 12 months. Hover across one segment of the chart to read out its exact value. A legend is also provided underneath the chart.

- Top 5 bunker ports

  Displays a donut chart that captures the 5 most used ports for bunker operations for your entire fleet within the last 12 months. Hover across one segment to read out its exact value. A legend is also provided underneath the chart.

- Top 5 agents

  Displays a donut chart that captures the 5 most used agents for your entire fleet within the last 12 months. Hover across one segment of the chart to read out its exact value. A legend is also provided underneath the chart.

- Top 5 crew change ports

  Displays a donut chart that captures the 5 most used ports for crew changes within the last 12 months. Hover across one segment of the chart to read out its exact value. A legend is also provided underneath the chart.

5.2. Vessels without schedule

The vessels without schedule card displays all vessels of your fleet that currently do not have a schedule. You can add a schedule by double-clicking the entry. For more information, see Add Schedule & Transit [19].

The following information per entry is provided:

• Image

 Displays the image of the vessel that lacks a schedule.

• Vessel

 Displays the name of the vessel that lacks a schedule.

• Last Port

 Displays last port of call and the estimated time of arrival.

5.3. Deviating ISPS Security Levels

The deviating ISPS security levels card provides you with an overview of port calls whose defined ISPS security level from CFM Ports differs from the ISPS security level of a schedule. This affects schedules from both, CFM Schedule & Agents as well as CSM Schedule & Agents. An ISPS security level that is not specified in either CFM Ports or the schedule will cause a deviation and be listed in this card accordingly.

Deviating ISPS Security Levels ⓘ

Wilhelmshaven (Germany) ETA 14.03.2022

Schedule — No ISPS entered.
Port — 3 (Exceptional)

Bremen (Germany) ETA 01.04.2022

Schedule — 3 (Exceptional)
Port — 2 (Heightened)

Hamburg (Germany) ETA 04.04.2022

Schedule — 1 (Normal)
Port — 3 (Exceptional)

The following information per entry is provided:

- Port

  Displays the port of call whose ISPS security level is deviating.

- Vessel image & name

  Displays the vessel's image and name which is scheduled to arrive in the port.

- ETA

  Displays the estimated time of arrival in the port.

- Schedule

  Displays the ISPS security level defined in the schedule.

- Port

  Displays the ISPS security level defined in CFM Ports.

You can use the card to immediately decide upon deviating ISPS security levels and thus resolve the given entries. To do so, simply select either **Schedule** or **Port**. Selecting schedule will overwrite the port's ISPS security level in CFM Ports, whereas selecting port will update the belonging schedule accordingly.

5.4. Upcoming bunkering

The upcoming bunkering card displays all vessels of your fleet whose estimated time of arrival is in the future, and which are also bunkering. You can access the overview of the vessels schedule by double-click the entry and apply necessary adjustments.

The following information per entry is provided:

- Image

  Displays the image of the vessel that has an upcoming bunkering scheduled.

- Port

  Displays the port where the upcoming bunkering takes place.

- Vessel

  Displays the name of the vessel that has the upcoming bunkering scheduled.

- Date

  Displays the estimated time of arrival at the port where the bunkering takes place.

5.5. Obsolete agent contacts

The obsolete agent contacts card displays every contact of all agencies that have been marked as obsolete. You can access each entry of the card by double-clicking the entry to add a new, edit or delete an existing contact. For more information, see Contacts [34].

The following information per entry is provided:

- Contact

  Displays the name of the contact that is marked as obsolete.

- Agent

  Displays the agent the contact belongs to.

5.6. Schedule activities

The schedule activities card provides an entire chronological activity log of all activities concerning your schedules, regardless of whether it was performed by a user onboard a vessel or an office user. This allows you to keep track of every single operation. Select **Show Changes** to view the complete activity log of operations that are considered a modification.

The following information per entry is provided:

- Date and Time

  Displays the point in time in which the schedule activity was carried out.

- Image

  Displays the image of the user that carried out the schedule activity.

- User

  Displays the name of the user that carried out the schedule activity.

- Type of activity

  Indicates which type of schedule activity was carried out. This is either *added*, *modified* or *deleted*.

- Schedule

  Displays the schedule on which the schedule activity was carried out.

- Port

 Displays the port of the schedule where the schedule activity was carried out.

- Vessel

Displays the vessel of the schedule where the schedule activity was carried out.

· Modified

Displays which part of the schedule was modified. This only applies to modified schedules.

5.7. Agent activities

The agent activities card provides an entire chronological overview of all activities concerning your agents, regardless of whether it was performed by a user on board a vessel or an office user. This allows you to keep track of every single operation. Select **Show Changes** to view the complete activity log of operations that are considered a modification.
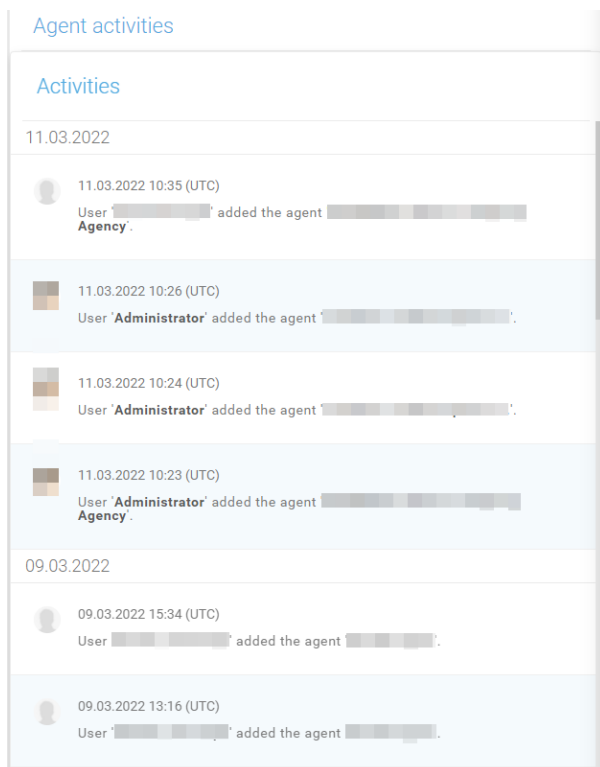
The following information per entry is provided:

· Date and time

Displays the point in time in which the agent activity was carried out.

· Images

Displays the image of the user that carried out the agent activity. A ⛴ vessel icon indicates if the activity was sent to the vessel.

· User

Displays the name of the user that carried out the agent activity.

· Type of activity

Indicates which type of agent activity was carried out. This is either *added*, *modified* or *deleted*.

· Agent

Displays the agent on which the agent activity was carried out.

- Modified
  Displays which part of the agent was modified. This only applies to modified agents.

6. Schedule

The schedule tab provides an overview of your entire fleet in a panel on the left-hand side, whereas the center of the screen displays current or historical schedules for a selected vessel.

The tab consists of the following cards:

- **Current**
- **History**

You can define the criteria by which the list of vessels is grouped and displayed. To do so, select the drop-down menu **Group by** and choose one of the following options:

- **No Grouping**

  No grouping is applied and the list of vessels is sorted by the internal number.

- **Type**

  Groups and displays the list of vessels according to the vessel type defined in CFM Particulars.

- **Subtype**

  Groups and displays the list of vessels according to the vessel subtype, which is defined in CFM Particulars.

- **Schedule status**

  Groups and displays the list of vessels according to their schedule status.

You can also simply filter the list of vessels by providing search terms, such as the name of the vessel or its (sub-)type.

Utilizing the ⋮ three-dot menu above the list of schedules allows you to apply one of the following options:

- **Cancel**

  Allows you to cancel a schedule without deleting it. You can recognise cancelled plans as they are strikethrough.

- **Assign Agent** / **Remove agent**

  Allows you to assign or remove an agent to or from a schedule. For more information on how to assign an agent to an existing schedule, see Assign Agent.

- **Manage attachment**

  Allows you to upload, edit, or delete attachments to your schedule.

> **NOTE**
>
> Choose the ⋏ activity icon to open the sidebar and then utilize the ⋮ three-dot menu to either **Show Activities**, **Show Comments**, or **Show Vessel Activities**.

6.1. Add Schedule & Transit

To add a schedule or transit to a vessel, proceed as follows.

1. Open CFM Schedule & Agents from your CFM instance.

2. Open the **Schedule** tab and select the vessel to which you want to add a schedule.

3. Choose the **Current** card and select **Add**.

   > **NOTE**
   >
   > You can also edit and delete entries. To do so, select the desired entry from the card and choose either **Edit** or **Delete**.

4. Specify, whether you add a **schedule** or a **transit** and provide the requested information:

   > **NOTE**
   >
   > Be aware that the requested information varies and therefore not every described information may be applicable in your case.

   - **Schedule**
     - Port

       Specify the port of destination.
     - ISPS Security Level

       The ISPS security level can be fetched, based on the given port.

> **NOTE**
> You can define the ISPS Security Level in CFM Ports.

- Terminal name
  Specify the terminal name of the port of destination.
- Voyage no. arrival
  Specify the arrival voyage number.
- Voyage no. departure
  Specify the departure voyage number.
- Vessel will take bunker
  Select this checkbox if the vessel will take bunker.
- Schedule is cancelled
  Select this checkbox to cancel the schedule.
- ETA
  Select the date and time picker to specify the estimated time of arrival.
- ETD
  Select the date and time picker to specify the estimated time of departure.
- ETB
  Select the date and time picker to specify the estimated time of berthing.
- Remark
  Provide any additional remarks relevant to the schedule.
- Events
  Select **Add Event** to add one or more of the following events to the schedule:

> **TIP**
> Select the ▣ fuel icon to add bunker information.
>
> Choose the ✕ X icon at the end of a row to remove an event.

- **Mooring (all-fast) and departure**
  Select the date and time picker to specify the time of arrival and time of departure.

  > **NOTE**
  > You cannot remove this event.

- **Anchoring in port before mooring**
  Select the date and time picker to specify the anchoring start and anchoring end.

- **End and begin of sea passage**

Select the date and time picker to specify the end of the sea passage and the commencement of the sea passage.

- **Point of releasing the hose connection**
  Select the date and time picker to specify the point in time in which the hose was taken off.

- **Point of vessel being prepared for cargo load or unload**
  Select the date and time picker to specify the notice of readiness.

- **Transit**
  - Canal

    Select the canal of transit from the drop-down menu.

  - Voyage number

    Enter the internal voyage number.

  - Estimated start

    Select the date and time picker to specify the estimated start of the transit.

  - Estimated end

    Select the date and time picker to specify the estimated end of the transit.

  - Start

    Select the date and time picker to specify the actual start of the transit.

  - End

    Select the date and time picker to specify the actual end of the transit.

  - Remark

    Provide any additional remarks relevant to the transit.

  - Cancelled

    Select this checkbox if the transit was cancelled.

5. Choose **Save** to confirm your settings.

6.2. Add Cargo Operations

Cargo operations allow you to keep track of cargo that has been loaded or discharged and can only be added to schedules. Cargo operations can be added to schedules at any time, regardless of whether the actual time of arrival and departure have been entered or not. In addition, as many operations as necessary can be reflected on schedules, enabling you to correctly express the conducted operations.

To add cargo operations, proceed as follows.

1. Open CFM Schedule & Agents from your CFM instance.
2. Open the **Schedule** tab and select a vessel.
3. Open a schedule and select the **Cargo Operations** tab.
4. Select the checkbox, depending on the conducted operation, and specify the following information:

> **NOTE**
>
> Select both checkboxes if the vessel was loaded and discharged during the same port stay.
>
> Before a *discharge* operation can be added, a loading operation of the same cargo type must be added to a previous schedule.
>
> Selecting the checkbox for discharge operation provides you with all loaded cargo types that have not been entirely discharged yet.

- **Cargo Type**
  Select the type of cargo that was loaded from the drop-down menu.

> **NOTE**
>
> Each cargo type is accompanied by its unit of measurement.
>
> Cargo types and units of measurement are managed via CFM Miscellaneous > **Operations** > **Freight Types**.

- **Quantity to Load** / **Quantity to Discharge**

Enter the cargo quantity that was loaded or discharged.

> **NOTE**
>
> For discharge operations, select the checkbox **Discharge** to enable this field.
>
> By selecting this checkbox, the remaining quantity of the loaded cargo is automatically populated. Enter the discharged quantity accordingly. If the discharged quantity is smaller than the remaining quantity, another discharge operation for the same cargo type can be added to a different schedule.

- **Discharge**

Select the checkbox if the cargo type was discharged during the port stay. This automatically populates the remaining quantity of the loaded cargo in the field *Quantity to Discharge*.

- **Time**

Select the 📅 date and 🕐 time picker to specify when the cargo operation was conducted.

> **TIP**
>
> Repeat this procedure until all conducted cargo operations are reflected correctly.
>
> To remove a loaded cargo type, select the ✕ icon.
>
> A new cargo type entry for loading is automatically created, allowing you to add as many cargo entries as necessary. Leave it empty if no further cargo operations took place.

5. Choose **Finish** to confirm your cargo operations.

You have successfully added conducted cargo operations to the schedule.

6.3. Current

The current card provides an overview of a vessels specific schedules, which are currently ongoing or lie in the future. You can easily manage the information of the schedule at any time.

The following information per schedule is provided:

- Voyage No.

   Displays the internal voyage number of a schedule.

- Port

   Displays the arrival port for this schedule.

- ETA

   Displays the estimated time of arrival at the port.

- ETB

   Displays the estimated time of berthing at the port.

- ETD

   Displays the estimated time of departure at the port.

- TOA

   Displays the actual time of arrival at the port.

- Terminal

   Displays the terminal of the arrival port.

- ISPS

   Displays the ISPS security level of the arrival port.

- Icon

   The following icons may be displayed:

   - The 👤 person icon indicates that an agent is already assigned for this voyage. Click this icon to view the assigned agent.

   - The ⬇ arrow down icon indicates that a vessel will load cargo.

   - The ⬆ arrow up icon indicates that a vessel will discharge cargo.

- The 🗲 fuel icon indicates that a vessel will take bunker.

6.4. History

The history card provides a complete historical overview of a vessel's specific schedule for which the actual time of departure lies in the past.

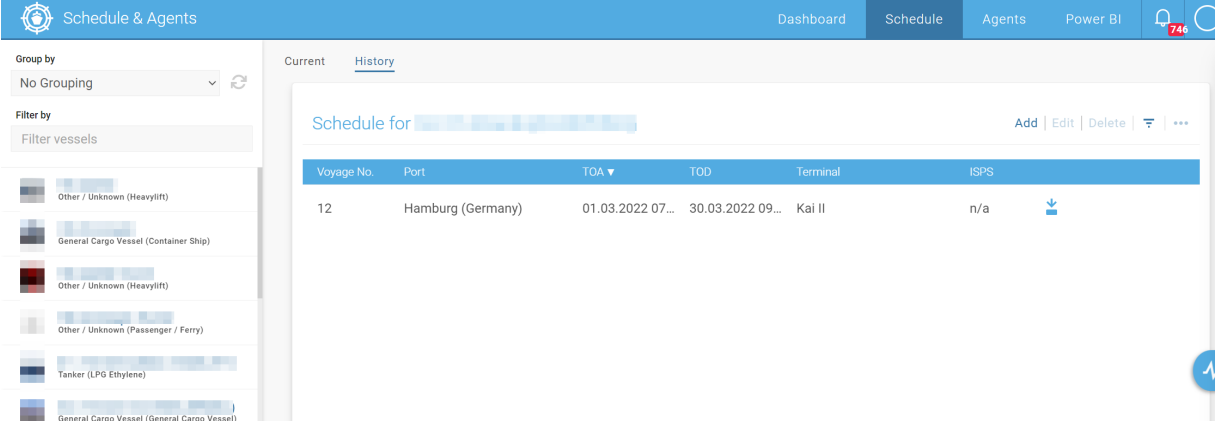The following information per historical schedule is provided:

- Voyage No.

  Displays the internal voyage number.

- Port

  Displays the arrival port.

- TOA

  Displays the actual time of arrival at the port.

- TOD

  Displays the actual time of departure from the port.

- Terminal

  Displays the terminal of the arrival port.

- ISPS

  Displays the ISPS security level of the arrival port.

- Icon

  The following icons may be displayed:

  - The ⭳ arrow down icon indicates that a vessel will load cargo.

  - The ⭱ arrow up icon indicates that a vessel will discharge cargo.

  - The 🗲 fuel icon indicates that a vessel will take bunker.

  - The 👤 person icon indicates that an agent is already assigned for this voyage. Click this icon to view the assigned agent.

You can also filter the historical schedules down according to your desired criteria. To do so, select the ⯆ filter icon and specify the following options:

- Start date
- End date
- Loading
- Discharging
- Bunkering
- Agent
- Transit
- Schedule
- Cancelled

Filter schedule   ✕

Start date *   End date

04.10.2021   📅 | 📅

Include:

☑ ⤓ Loading   ☑ ⤒ Discharging

☑ 🛢 Bunkering   ☑ 👤 Agent

☑ Transit   ☑ Schedule

☑ Cancelled

7. Agents

The agents tab displays a customisable panel on the left-hand side, whereas the rest of the screen is divided into 6 different cards that contain in-depth information about a selected agent.

The tab consists of the following cards:

- **General**
- **Vessels**
- **Addresses**
- **Charterers**
- **Ports**
- **Contacts**

You can define the criteria by which the panel is grouped and displayed. To do so, select the drop-down menu **Group by** and choose one of the following options:

- **Agent type**

  Groups and displays the list of agents according to the agent type defined in the general card. For more information, see General [30].

- **Agent Name**

  Groups and displays the list of agents according to the agent name, which is defined in the general card. For more information, see General [30].

- **Ports in use**

  Groups and displays the list of agents according to the usage status of the port they are assigned to. Available status of ports are:

  - Past Ports

    Groups and displays the list of ports that were scheduled in the past. Expand an entry to see which agent used this port in the past.

  - Unused Ports

    Groups and displays the list of ports that were not scheduled so far.

    > **⬚ NOTE**
    >
    > You can only expand ports when an agent is assigned to a specific port or the country of a port.

  - Future Ports

    Groups and displays the list of ports that were scheduled for the future and their assigned agents.

  - Unassigned Agents

    Groups and displays the list of agents that were not assigned to any port.

- **Port name**

  Groups and displays the list of ports in alphabetical order.

- **War risk**

  Groups and displays the list of ports according to their war risk. This is either **No war risk** or **War risk**.

- **Country**

  Groups and displays the list of agents according to their assigned ports country in alphabetical order.

- **Charterer**

  Groups and displays the list of agents according to their assigned charterers in alphabetical order.

- **Vessel**

  Groups and displays the list of agents according to their assigned vessels in alphanumerical order, based on the internal number.

You can also simply filter the list of agents by providing search terms that reflect the applied grouping, such as agent name, country, or vessel.

Further, does the ⊤ filter icon allow you to include the following agent types:

- **Husbanding**

- **Owner**

- **Forwarding**

- **Charter**

- **Crewing**

> **NOTE**
>
> To add an agent, select the + plus icon next to the Group by drop-down menu. For more information on how to add an agent, see Add Agent [29].

7.1. Add Agent

To add an agent, proceed as follows.

1. Open CFM Schedule & Agents from your CFM instance.
2. Choose the **Agents** tab and select the + plus icon.
3. Provide the requested information:
   - Name

     Enter the name of the agent.
   - Is owners agent

     Select this checkbox if the agent is considered an owners agent.
   - Is charter agent

     Select this checkbox if the agent is considered a charter agent.
   - Is husbanding agent

     Select this checkbox if the agent is considered a husbanding agent.
   - Is crewing agent

     Select this checkbox if the agent is considered a crewing agent.
   - Is forwarding agent

     Select this checkbox if the agent is considered a forwarding agent.
   - Company phone

     Enter the agent's company phone number.
   - Company E-Mail

     Enter the agent's company E-Mail address.
   - Company website

     Enter the agent's company website.
   - Remark

     Provide any additional remarks relevant to the agent.
   - Create main contact

     Select this checkbox if you want to create the main contact for this agent.
     - Name

       Enter the first name of the main contact.
     - Surname

Enter the last name of the main contact.

- Nationality

  Select the nationality of the main contact from the drop-down menu.

- Sex

  Select the gender of the main contact from the drop-down menu.

- Phone 1

  Enter the phone number of the main contact.

- Phone 2

  Enter an alternative phone number of the main contact.

- Mobile

  Enter the mobile phone number of the main contact.

- Fax

  Enter the fax number of the main contact.

- E-Mail 1

  Enter the E-Mail address of the main contact.

- E-Mail 2

  Enter an alternative E-Mail address of the main contact.

4. Choose **Save** to confirm your settings.

7.2. General

The general card of an agent provides basic information, which is defined when the agent is added in the first place.

However, you still can edit any information on this card. To do so, simply choose **Edit** and apply the desired changes.

To remove an agent from the system and thus disable its further usage of it, simply choose **Archive**.

Utilizing the ⋮ three-dot menu allows you to apply the following options:

- **Copy to clipboard**

  Select **Copy to clipboard**, which automatically copies the entire information from the general card and allows you to conveniently insert it at any other place.

- **Merge**

  Select **Merge** and specify the agent which will be merged into the currently selected one.

> ❗ **IMPORTANT**
> This action is not reversible.

7.3. Vessels

The vessels card displays all assigned vessels for a specific agent and also allows you to manage these.

To assign a new vessel to the agent, choose **Add** and either select a vessel from the list or provide its name into the search box above.

You can also remove an assigned vessel from the agent. To do so, simply choose the vessel and select **Delete**.

7.4. Addresses

The addresses card displays all defined addresses of the selected agent and allows you to manage these.

To add an address, proceed as follows.

1. Open CFM Schedule & Agents from your CFM instance.
2. Choose the **Agents** tab and select the desired agent from the panel on the left-hand side.
3. Navigate to the **Addresses** card and select **Add**.

> **NOTE**
> You can also edit and delete entries. To do so, select the desired entry from the card and choose either **Edit** or **Delete**.

4. Provide the requested information:
   - Street
     Enter the street where the agent is located.
   - Postal Code
     Enter the postal code where the agent is located.
   - City
     Enter the city where the agent is located.
   - Country
     Select the country where the agent is located from the drop-down menu.
   - Additional information
     Provide any additional information relevant to the address of the agent.
   - Set as main address
     Select this checkbox if the address is considered as the main address of the agent.
     Main addresses are indicated by a ⭐ star icon.

7.5. Charterers

The charterers card displays all assigned charterers for a specific agent and also allows you to manage these.

To assign a new charterer, choose **Add** and either select a charterer from the list or provide its name into the search box above.

You can also remove an assigned charterer from the agent. To do so, simply choose the charterer and select **Delete**.

7.6. Ports

The ports card provides an overview of all assigned countries as well as specific ports of an agent and also allows you to manage these.

You can either assign assign an agent to a specific port or a country and thus, all ports within this country. To do so, select either **Add** or **Add Country**. Subsequently, choose either a port, respectively a country from the list or provide its name into the search box above.

You can also remove an assigned port or country from the agent. To do so, simply choose the desired entry and select **Delete**.

7.7. Contacts

The contacts card displays an overview of all defined contacts for a specific agent and also allows you to manage these.
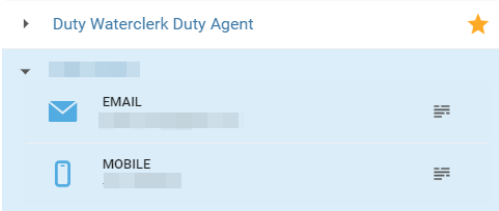
To add a contact to an agent, proceed as follows.

1. Open CFM Schedule & Agents from your CFM instance.

2. Choose the **Agents** tab and select the desired agent from the panel on the left-hand side.

3. Navigate to the **Contacts** card and select **Add**.

> ✎ **NOTE**
> You can also edit and delete entries. To do so, select the desired entry from the card and choose either **Edit** or **Delete**.

4. Provide the requested information:
    - Name
      Enter the first name of the contact.
    - Surname

Enter the last name of the contact.

- Nationality

  Select the contacts nationality from the drop-down menu.

- Sex

  Select the contacts gender from the drop-down menu.

- Is main contact

  Select this checkbox if the contact is considered as the main contact of the agent.
  Main contacts are indicated by a ★ star icon.

5. Choose **Save** before adding communication methods.

6. Select the added contact and choose **Edit** to add communication methods.

- Value

  Specify the correlating communication details.

- Type

  Select the communication method from the drop-down menu.

- Remark

  Provide any additional relevant remarks to the communication method.

Add communication method

Value *

Type *

Choose...

Remark

Save

7. Choose **Save** to confirm your settings.

8. Report

The Reports tab provides access to all predefined reports provided by Hanseaticsoft GmbH and created using the integrated Microsoft Power BI solution.

On this tab, you can also embed customized reports within CFM Schedule & Agents that you created with your own Power BI license.

Additionally, you can download the predefined reports, modify them, and make them available to all your colleagues online.

For more detailed information, see the manual on CFM Power BI Management.

> **NOTE**
> You need to purchase this feature separately, to leverage the Power BI integration.

The following reports are available from this tab:

- **Agent map**
- **Ports of call**

8.1. Agent Map

The agent map provides a real-time report, visualised as dots in a heat map, on how often which agent served in which port. Hover across a dot to read out its information. Below the heat map is the correlating list displayed. An additional bar chart displays the top ports on the right-hand side.

Select an entry from any list, regardless of whether it is from the heat map, the underneath list or the bar chart on the right-hand side, to highlight it accordingly.
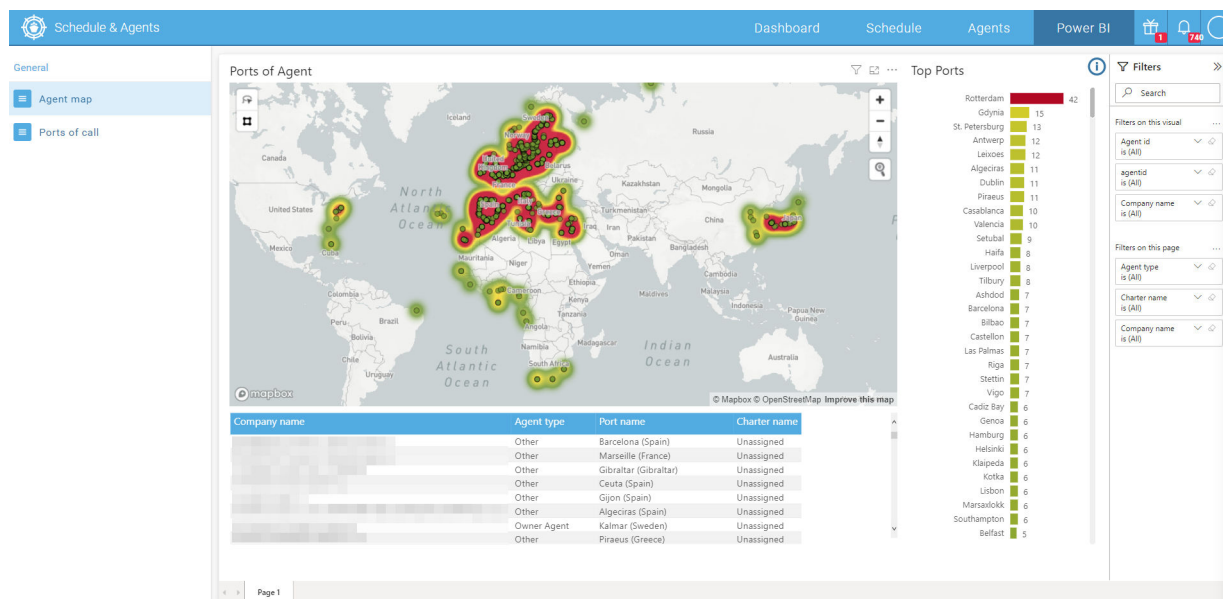
The following general features are provided:

- Filter the report for agent type, charter name and company name.

- Select the ⬚ focus icon to display the focused content magnified.

- Choose the ⋯ three-dot menu above each card to apply one of these options:

> 🗒 **NOTE**
>
> Be aware that not every card provides the below-described options.

- **Export Data**

  Select **Export data** and specify the data that you want to export, as well as the file format in the dialog window.

- **Show as a table**

  Select **Show as a table** to display the correlating visualised information as a table. Select **Back to report** for the initial view.

- **Spotlight**

  Select **Spotlight** to dim the remaining cards.

- **Get insights**

  Select **Get Insights** to explore and find further insights in your data.

- **Sort descending**

  Sort the list in descending order.

- **Sort ascending**

  Sort the list in ascending order.

- **Sort by**

  Sort the list by further conditions.

8.2. Ports of Call

The ports of call provides a real time report, visualised as dots in a heat map, on how often a port was called. Hover across a dot to read out its exact value of port calls. Below the heat map is the correlating list displayed.

Select an entry to highlight it accordingly.
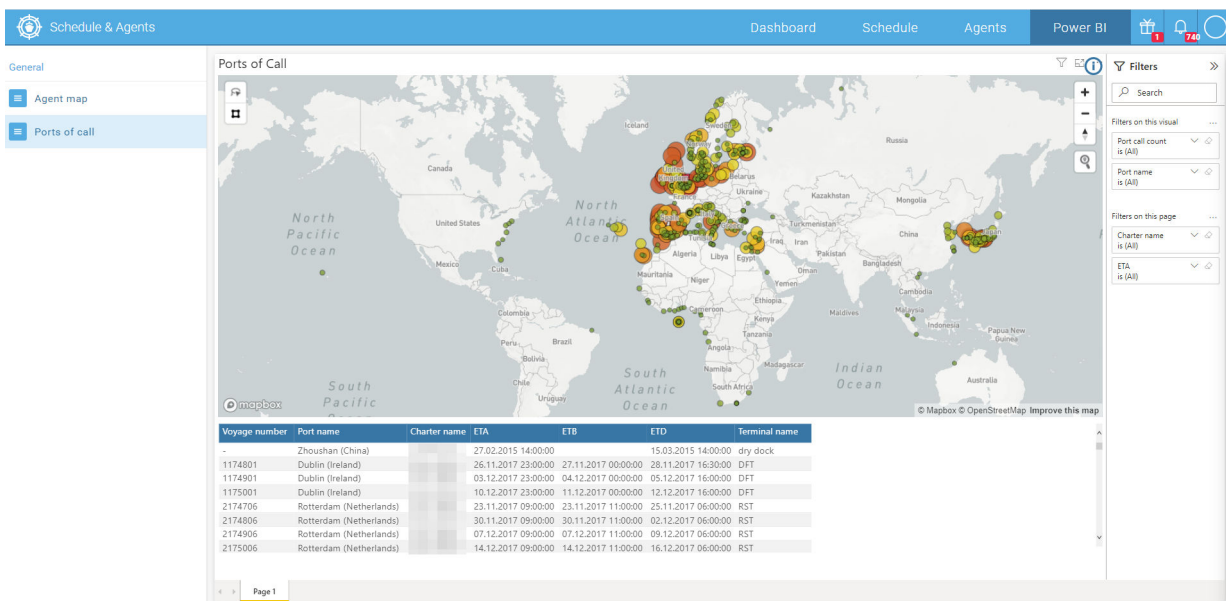
The following general features are provided:

• Filter the report for port call count or port name.

• Select the ⬔ focus icon to display the focused content magnified.

• Choose the ⋯ three-dot menu above each card to apply one of these options:

> ### 🖾 NOTE
> Be aware that not every card provides the below described options.

• **Export Data**

  Select **Export data** and specify the data that you want to export, as well as the file format in the dialog window.

• **Show as a table**

Select **Show as a table** to display the correlating visualised information as a table. Select **Back to report** for the initial view.

- **Spotlight**

  Select **Spotlight** to dim the remaining cards.

- **Get insights**

- **Sort descending**

  Sort the list in descending order.

- **Sort ascending**

  Sort the list in ascending order.

- **Sort by**

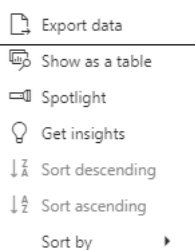 Sort the list by further conditions.

⬚→	Export data
⬚	Show as a table
⊏◖	Spotlight
♀	Get insights
↓ⁿ	Sort descending
↓ᵃ	Sort ascending
	Sort by ▸

9. 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
v1.2.0	• Extended global features to specify vessels of which responsibility types are shown	06.02.2024	Ricardo da Costa Lima
v1.1.1	• Dashboard provides a dedicated list of ports with deviating ISPS security levels	11.10.2022	Ricardo da Costa Lima
v1.1.0	• Ports' ISPS security level can be managed within a schedule • Agent's general information is extended by company phone number, email, and website	23.09.2022	Ricardo da Costa Lima
v1.0.0	• Initial creation of user guide	29.04.2022	Ricardo da Costa Lima