



Cloud Fleet Manager

# MANUAL

---

## CSM CERTIFICATES

2022-10-11

© Hanseaticsoft 2022. All rights reserved.

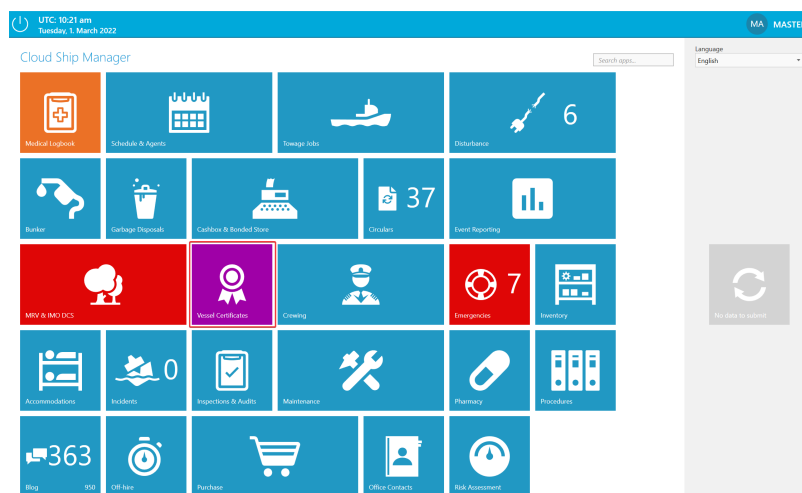
## Table of Contents

<b>1. About This Guide</b> .....	<b>4</b>
<b>2. Initial Setup</b> .....	<b>5</b>
<b>3. Login to Cloud Ship Manager</b> .....	<b>6</b>
3.1. Login with Rank .....	6
3.2. Login as a Seafarer .....	8
<b>4. Vessel Certificates</b> .....	<b>9</b>
<b>5. Revision History</b> .....	<b>12</b>

# 1. About This Guide

This user guide provides an introduction to CSM Certificates and describes how you can leverage the application to meet your business needs.

CSM Certificates allows you to view certificates and surveys, specifically assigned to your vessel as well as general information, such as the name, its type, and status for example. Further, depending on the applied settings from your office users, you may also be able to apply changes to these certificates and surveys.



CSM Certificates consists of the card:

- **Vessel Certificates**



## NOTE

If you cannot access the Certificate tile from the Cloud Ship Manager (CSM), please contact your system administrator to assign the relevant permissions to your user in the CFM Ship Client Manager app.

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 CSM Certificates, certain prerequisites must be met.

1. Download and install the CSM server.
2. Download and install the CSM client.
3. Manage access to the applicable CSM modules for different ranks using the [CFM Ship Client Manager](#) app.
4. Manage access to CSM for users and corresponding vessels using the [CFM Ship Client Manager](#) app.
5. Login to the CSM client.

### See also

For detailed information about the setup process, see our installation guide under [CFM Ship Client Manager > Documentation > Cloud Ship Manager Setup](#).

## 3. Login to Cloud Ship Manager

You have two options, to login to your Cloud Ship Manager client.

- Login with Rank

This is the standard login procedure on board the vessel. You use the rank that you're currently holding during the assignment.

- Login as a Seafarer

You login with your own user account as a seafarer.

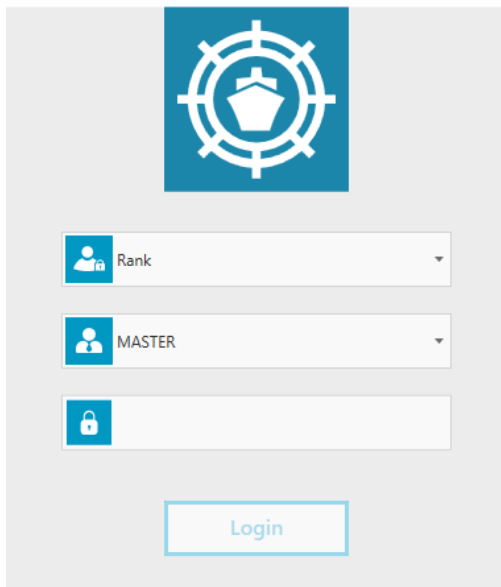
For this login option to work, your user account must be activated and the corresponding permission rights must be assigned to the rank the seafarer is holding during the current assignment. The seafarer login serves as a personal identification.

Another prerequisite is that you must be planned for an assignment so that your data is synchronized to CSM.

### 3.1. Login with Rank

To login with the current rank on board the vessel, proceed as follows.

1. Open your CSM client.
2. Choose **Rank** from the drop-down list.





3. Choose the rank you're holding during the assignment from the second drop-down list.
4. Enter the corresponding password.



**NOTE**

A generic password for the rank is provided once you purchased CSM.

The passwords for the different ranks can be managed under **CFM Ship Client Manager > Configuration > Users**.

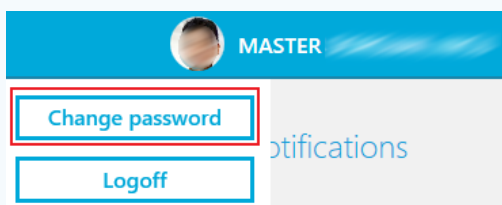
Choose the  crossed-out eye icon to view your entered password and select the  eye icon to hide your password again.



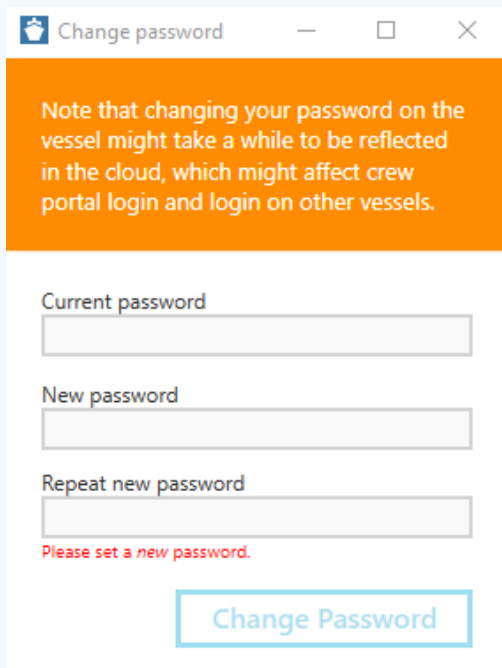
**TIP**

You can change the password after the first login given that the required permission was assigned to your user account.

1. Choose the user avatar in the upper right corner and choose **Change password**.



2. Enter your current password in the dialog window.



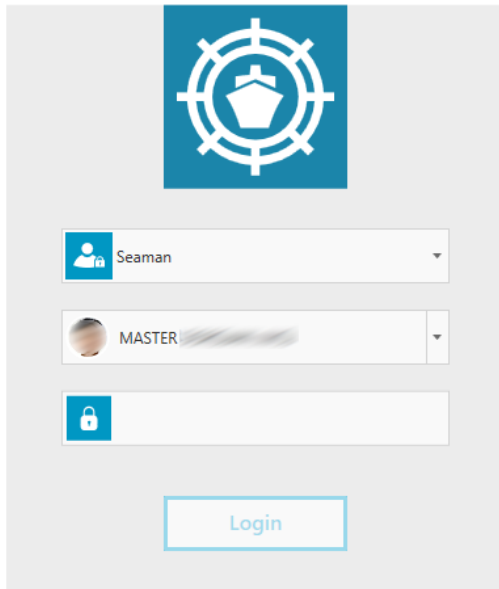
3. Enter your new password.
4. Repeat your new password.
5. Choose **Change Password** to save your new password.

5. Choose **Login** to login to the CSM client.

## 3.2. Login as a Seafarer

To log in with your seafarer user, proceed as follows.

1. Open your CSM client.
2. Choose **Seafarer** from the drop-down list.



3. Choose your user account from the second drop-down list.



### NOTE

All seafarers that are part of the crew list for the current assignment and for whom user accounts exist are available in the drop-down list.

4. Enter your password.
5. Choose **Login** to login to the CSM client.



## 4. Vessel Certificates

The Vessel Certificates display all certificates that were assigned to your vessel. It contains information, such as the unique tracking number, type, and expiry date. The list is grouped by their respective certificate group and sorted according to the order in which these were created in CFM Certificates.

Name	UIN	Code	Type	Issued On	Expires On	Last Annual	Next Annual	Last Intermediate	Next Intermediate	Remark
<b>SHORE BASED CERTIFICATION</b>										
DOCUMENT OF COMPLIANCE (MI)		DOC - MI	Certificate							
DOCUMENT OF COMPLIANCE - CHEMICAL (MI)		DOC - MI	Certificate							
DOCUMENT OF COMPLIANCE (POR MAD)		DOC - POR MAD	Certificate							
DOCUMENT OF COMPLIANCE (MALTA)		DOC-MALTA	Certificate							
<b>TRADING CERTIFICATE</b>										
Certificate of Class			Certificate		13/01/2023					
Load line certificate			Certificate				03/06/2022			
Safety equipment (Safeq) certificate			Certificate		02/07/2022		01/06/2022			
Annual Test of Lifting Appliances			Certificate		11/03/2022	06/12/2021	06/12/2022	13/07/2021	14/07/2022	
ITF Blue Card			Certificate		03/02/2022					
<b>INSURANCE CERTIFICATES</b>										
P&I Certificate of Entry			Certificate							
<b>FIRE FIGHTING EQUIPMENT</b>										
Portable CO2 extinguisher inspect/ weighing			Equipment							
<b>LIFE SAVING EQUIPMENT</b>										
Line throwing apparatus with rockets and lines No 4		LTA	Equipment							

The following information is displayed:

- Icon

A vessel icon indicates that this certificate can be edited. You cannot edit this if no vessel icon is displayed.



### NOTE

Further, the color code of the vessel icon indicates the respective status of the certificate.

- - The certificate is valid. No action is needed.
- - The certificate is in range of validity.
- - The certificate is expired.
- - The certificate is incomplete.

- Name

Displays the name of the certificate.



### NOTE

You cannot edit this information.

- **UTN**  
Displays the unique tracking number of the certificate.
- **Code**  
Displays the code for the certificate.



### NOTE



You cannot edit this information.

- **Type**  
Displays the type of certificate. This is either **Certificate** or **Equipment**.
- **Assign Date**  
Displays the date on which the surveyor conducted the audit.



### NOTE

The corresponding setting in CFM Certificates must be activated to display this information and allow applying changes on board the vessel.

- **Issued On**  
Displays the date when the certificate was issued.
- **Expires On**  
Displays the date when the certificate expires.
- **Last Annual**  
Displays the date of the last annual survey.
- **Next Annual**  
Displays the date of the next annual survey.
- **Last Intermediate**  
Displays the date of the last intermediate survey.
- **Next Intermediate**  
Displays the date of the next intermediate survey.
- **Remark**  
Displays this  remark icon, respectively this  document icon, if it is given accordingly. Hover across the remark icon to read it within a tooltip or click the document icon to open the attachment.



### IMPORTANT

The color coding is applied and displayed only on those cells that cause the status of the certificate.

You can also filter the list of certificates to your needs, by utilizing the checkboxes above the table that also indicate the color code.

- Hide Non-Editable Certificates
- The certificate is valid. No action is needed. 🗑️
- The certificate is in range of validity. 🏆
- The certificate is expired. 🚫
- The certificate is incomplete. 🛠️



### NOTE

Further, you can utilize the search bar above the table and provide search terms, such as the certificate's name or the code.

The following general features are available to you:

- **Edit**

You can edit all certificates with a vessel icon in the first column, regardless of the color code. To do so, simply select a certificate and choose **Edit** or open it via double-click. Apply your desired changes to the certificate.



### NOTE

You cannot edit the name or the code of the certificate.

- **Batch Download**

You can download all certificates that contain an attachment in a batch. To do so, simply choose **Batch Download** and select the checkboxes of certificates you want to include.



### IMPORTANT

**Batch Download** only works for certificates that are already available on board and does not apply to certificates that are only available in the office.

- **Export**

You can export your certificates to an Excel file. To do so, simply choose **Export**.

## 5. 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 adaptations increment the minor number and all other updates increase the patch number.

Version	Changes	Date of Publication	Author
v1.0.1	<ul style="list-style-type: none"> <li>• A vessel's 'assign date' can now be displayed</li> <li>• A few labels were renamed</li> <li>• Look up a certificate by entering its code or type into the search bar</li> </ul>	11.10.2022	Ricardo da Costa Lima
v1.0.0	<ul style="list-style-type: none"> <li>• Initial creation of user guide</li> </ul>	08.04.2022	Ricardo da Costa Lima