Cloud Fleet Manager

MANUAL

CSM CIRCULARS

2021-07-07

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1. About This Guide

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

CSM Circulars allows you to inform the crew on board about internal processes or to distribute company newsletters. Circulars are always created by the colleagues in the office using CFM Circulars and the crew on board has the task to complete checklist items, if these exist. All data are synchronized between the crew using CSM Circulars and the office using CFM Circulars and are thus always up to date.
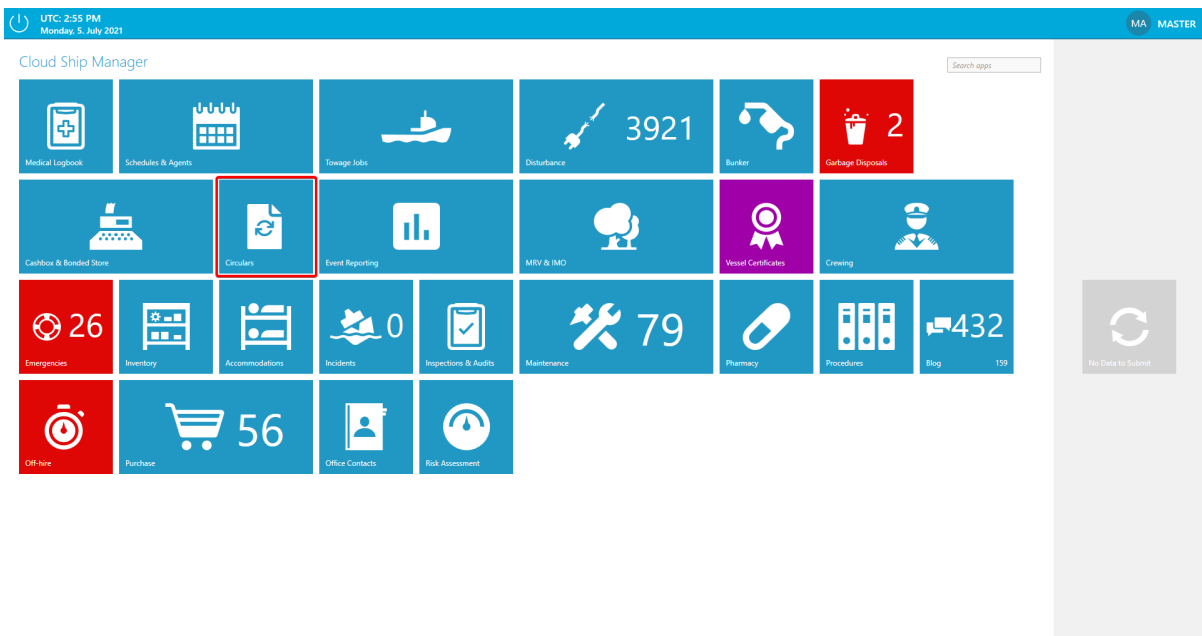
The app consists of the following tabs:

- **Latest Circulars**
- **Circulars**

> ◺ **NOTE**
> If you cannot access the **Circulars** 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 Circulars 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**.

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Initial Setup

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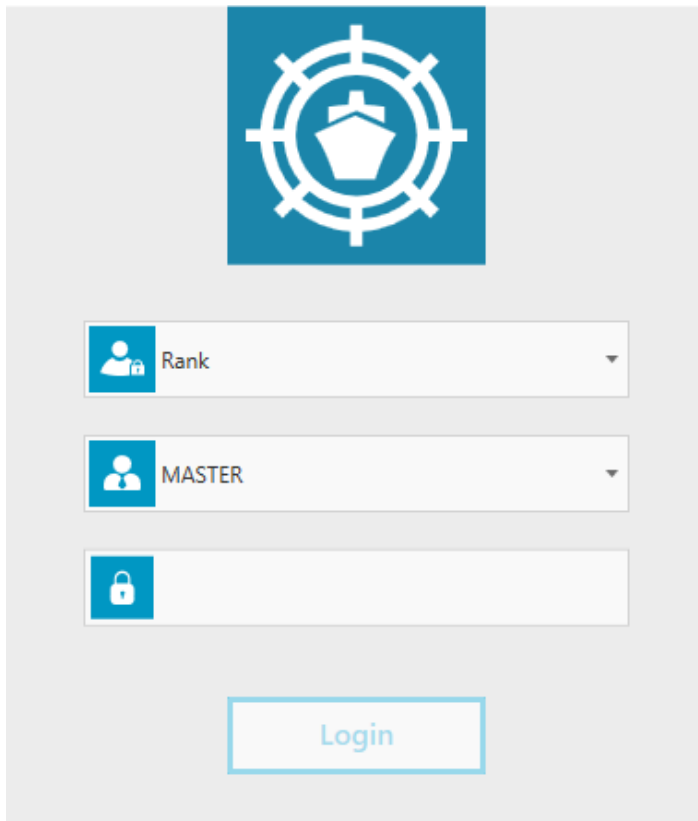
  Another prerequisite is that you must be planned for an assignment so that your data are synchronized to CSM.

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**.

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**.
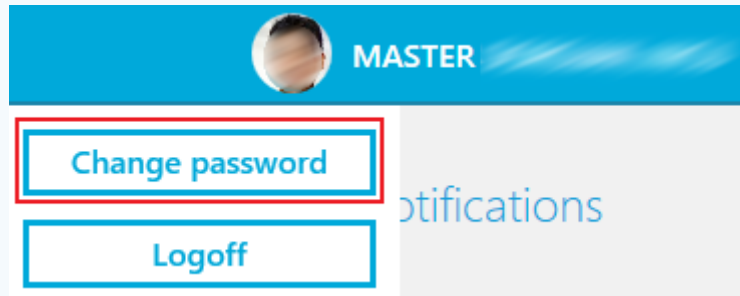
2. Enter your current password in the dialog window.
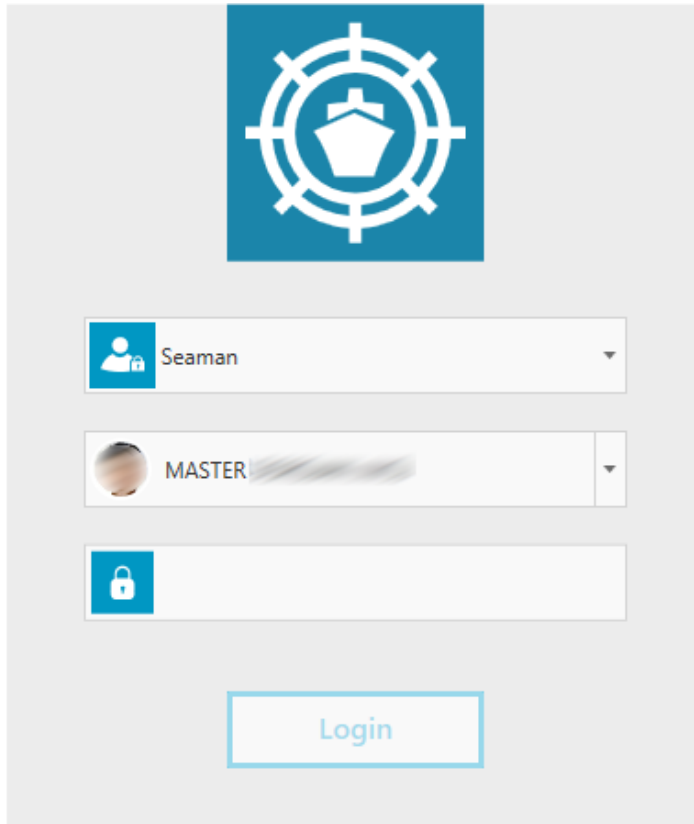
3. Enter your new password.

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 login 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.

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Login as a Seafarer
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4. Latest Circulars

The **Latest Circulars** tab displays all circulars for a selected period of time.

By default, the system displays the circulars that were released in the last three months. You can, however, change the time period by choosing one of the following options from the drop-down list:

- **3 Months**
- **6 Months**
- **1 Year**
- **2 Years**
- **All**

You can also filter the list of circulars by entering a search term, such as the name of the author, the title of the circular, or its content in the search bar at the top.

The circulars are grouped as follows:

- **All**
  Lists all circulars that are available according to the selected time period.
- **Unread**
  Lists all circulars that have not been opened by the vessel yet.
- **Incomplete Checklists**
  Lists all circulars with open checklist items.
- **Other Circulars**
  Lists all remaining circulars that are neither unread or have incomplete checklist items.

The following information is displayed for each circular:

> **TIP**
> Choose an entry from the tab to view a preview of the circular in a popup window.

- Color indicating the circular's status:
  - **Blue** - Circular is unread.
    A circular is considered as read as soon as its preview is opened. It is not explicitly marked as read by a user.

- Thumbnail of the author
- Title of the circular
- Date on which it was released using CFM Circulars
- Content
- Name of the author
- Number of completed and total checklist items
- Number of attachments
- Department and category
- Revision number

5. Circulars

The **Circulars** tab displays all circulars available in the system grouped by department and for a selected time period.

By default, the system displays all circulars. You can, however, change the time period by choosing one of the following options from the drop-down list:

- **3 Months**
- **6 Months**
- **1 Year**
- **2 Years**
- **All**

You can also filter the list of circulars by entering a search term, such as the name of the author, the title of the circular, or its content in the search bar at the top.

The circulars are grouped by department and the corresponding department categories in the left sidebar. By default, the first circular of the first department category is displayed in the center of the screen.

All lists all departments and department categories and thus all circulars available in the system.

The following information is displayed for each circular:

> **TIP**
> Choose an entry from the tab to view a preview of the circular in a popup window.

- Color indicating the circular's status:
  - **Blue** - Circular is unread.
    A circular is considered as read as soon as its preview is opened. It is not explicitly marked as read by a user.
- Title of the circular
- Date on which it was released using CFM Circulars
- Content
- Name of the author

- Number of attachments
- Department and category
- Revision number

5.1. Complete Checklist Items

To complete checklist items that are part of a circular, proceed as follows.

1. Login to your CSM client.
2. Open the **Circulars** tile.
3. Go to the **Latest Circulars** tab.
4. Choose a circular from the **Incomplete Checklists** category.

5. In the dialog window, set the checkbox next to the checklist item that you completed.
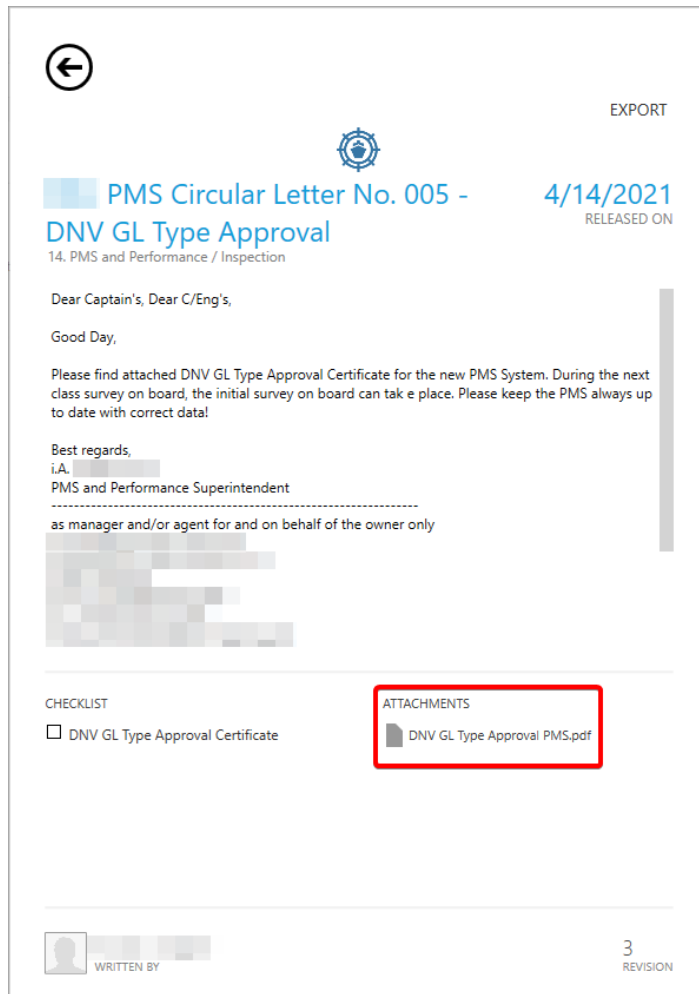

5.2. Request and Download Attachments

To request and download attachments of circulars, proceed as follows.

1. Login to your CSM client.
2. Open the **Circulars** tile.
3. Go to the **Latest Circulars** or **Circulars** tab.
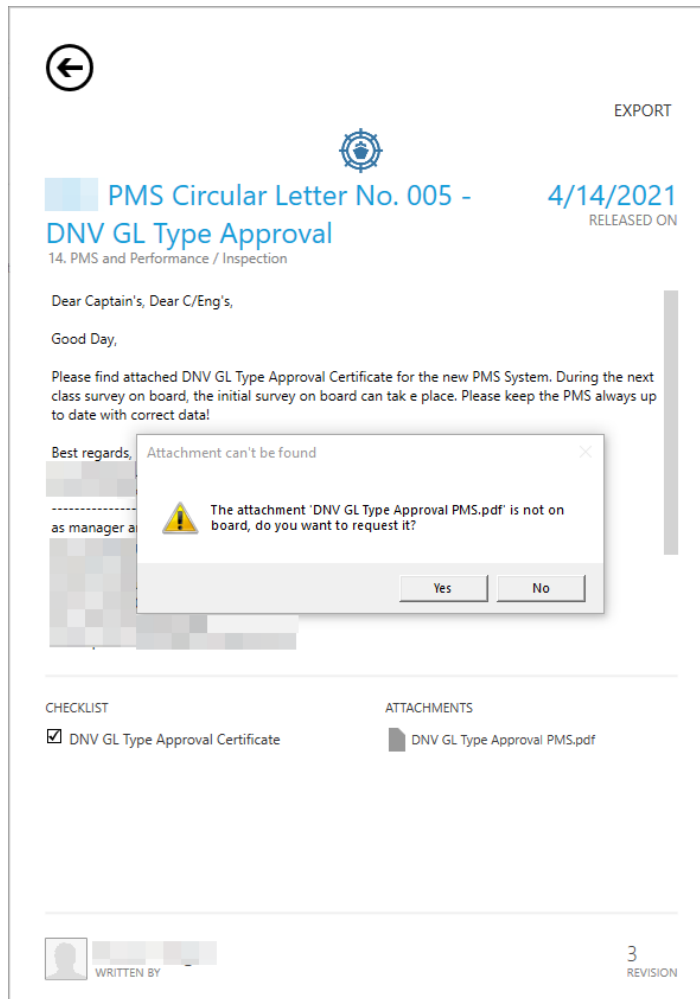4. Choose a circular from one of the categories on the tabs.

5. In the dialog window, choose the **Attachment** icon (▯) icon.

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6. Confirm the warning message that you want to request the attachment from CFM Circulars.

7. Go to the app module overview and choose **Submit changes**.

Result

It takes a few minutes until the attachments are synchronized from the shore side to the vessel.

5.3. Export Circulars

To export circulars to a PDF file, proceed as follows.

1. Login to your CSM client.
2. Open the **Circulars** tile.
3. Go to the **Latest Circulars** or **Circulars** tab.
4. Choose a circular from one of the categories on the tabs.

5. In the dialog window, choose **Export**.
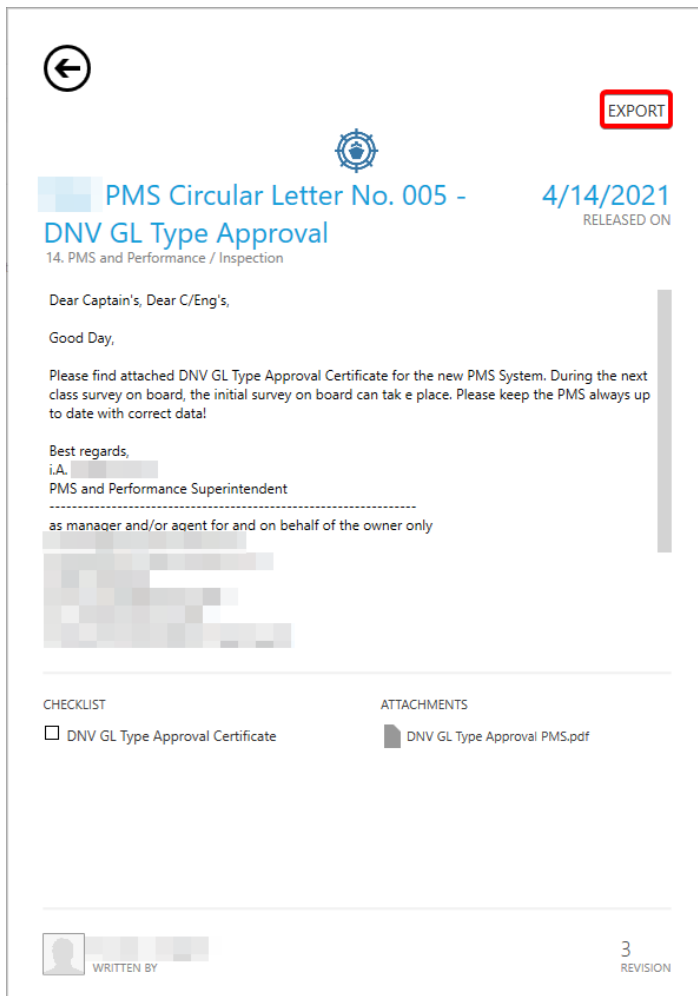
6. Choose the location on your device where you want to store the file and choose **Save**.