Cloud Fleet Manager

MANUAL

CSM DISTURBANCE

2022-12-21

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1. About This Guide

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

CSM Disturbance allows you to record and manage disturbances that occurred on board the vessel. Once you have created a disturbance report, the data is synchronized to CFM Disturbance and allows colleagues in the office to process the report further and provide a solution.

It consists of the following tabs:

• **Dashboard**

• **Disturbances**

• **Activities**

• **Closed**

> 🗒 **NOTE**
> If you cannot access the **Disturbance** 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 Disturbance, 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**

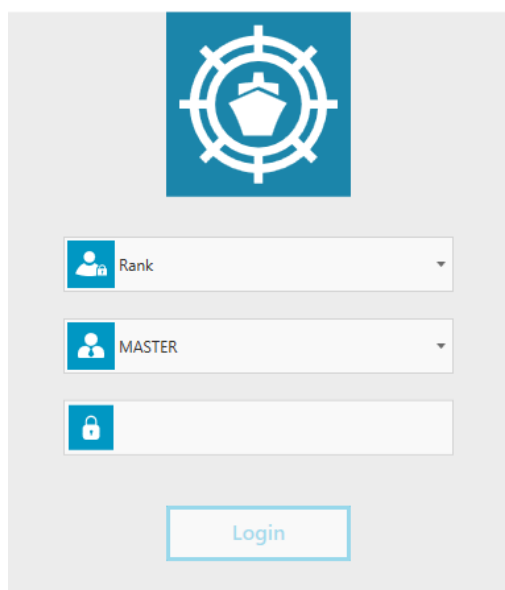 You login with your own user account as a seafarer.

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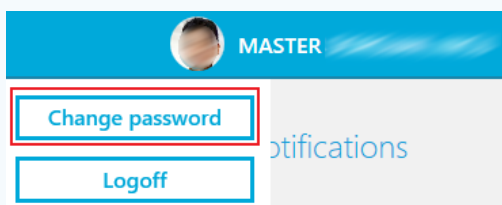
Choose the ⌀ crossed-out eye icon to view your entered password and select the 👁 eye icon to hide your password again.
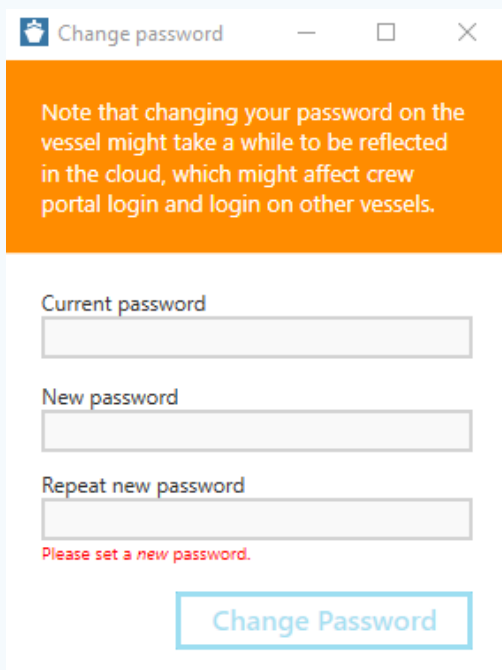
TIP

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**.

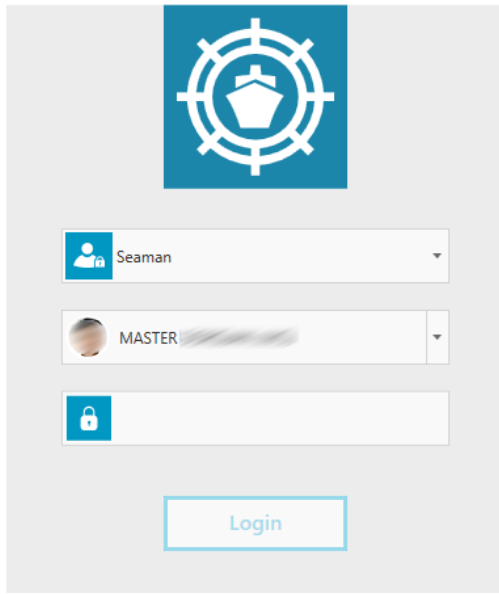2. Enter your current password in the dialog window.

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. Dashboard

On the **Dashboard** tab, you are provided with an overview of the most crucial disturbance-related information at a glance.

It acts as your center of information and allows you to keep track of the most recent information.
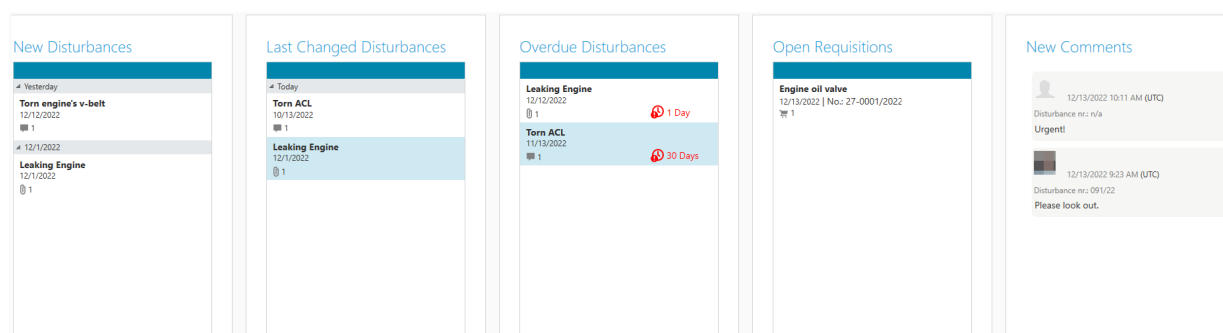
The dashboard tab consists of the following cards:

> **NOTE**
> You can open each entry from every card by performing a double-click on the entry.

- **New Disturbances**

  Lists all disturbances of the last 30 days in descending order, based on the creation date. The following information accompanies every entry:

  - Disturbance title

  - Creation date

  - 💬 - A comment icon is displayed if the disturbance report contains comments. The icon is accompanied by a numerical value to indicate the number of comments.

  - 📎 - A paper clip icon is displayed if the disturbance report contains attachments. The icon is accompanied by a numerical value to indicate the number of attachments.

- **Last Changed Disturbances**

  Lists all disturbances that were changed within the last 7 days in descending order, based on the date of the change. The following information accompanies every entry:

  - Disturbance title

  - Creation date

- 🗨 - A comment icon is displayed if the disturbance report contains comments. The icon is accompanied by a numerical value to indicate the number of comments.

- 📎 - A paper clip icon is displayed if the disturbance report contains attachments. The icon is accompanied by a numerical value to indicate the number of attachments.

- **Overdue Disturbances**

  Lists all open disturbances that reached their due date in descending order, based on the overdue date. The following information accompanies every entry:

  - Disturbance title

  - Disturbance's overdue date

  - 🗨 - A comment icon is displayed if the disturbance report contains comments. The icon is accompanied by a numerical value to indicate the number of comments.

  - 📎 - A paper clip icon is displayed if the disturbance report contains attachments. The icon is accompanied by a numerical value to indicate the number of attachments.

  - 🕐 - A red color-coded clock icon with an exclamation mark is displayed to indicate that the disturbance report closure date is overdue. The icon is accompanied by a numerical value to indicate the number of overdue days.

- **Open Requisitions**

  Lists all open requisitions that were connected to a disturbance report via CFM Disturbances. The requisitions are sorted in descending order, based on the requisition's creation date. The following information accompanies every entry:

  - Requisition title

  - Requisition's creation date

  - Requisition number

  - 🛒 - A shopping cart icon is accompanied by a numerical value to indicate the number of items of the requisition.

- **New Comments**

  Lists all disturbance reports' comments of the last 14 days in descending order, based on the comment's date. The following information accompanies every entry:

  - Commentator's avatar

  - Comment's date and time

  - Commented disturbance number

  - Comment

5. Disturbances

The **Disturbances** tab provides you with an overview of disturbance reports that are currently in progress.

It acts as a ticketing system for vessels allowing you to process reports or services.

The tab is divided into the following cards:

- **New**

  Lists all disturbance reports that were recently created and are not being processed yet.

  If a disturbance report has not been sent to CFM Disturbance yet, this is indicated in red: **Not yet sent** and no report number has been assigned to it yet.

  Report numbers are automatically added to a disturbance report once it has been sent to CFM Disturbance.

- **In Progress**

  Lists all disturbance reports that are already being processed.

- **Docking**

  Lists all disturbance reports that are processed once the vessel is in dry dock.

By choosing an entry from the list, you can view the details of the respective disturbance report and if possible, make any changes.

> **NOTE**
> The disturbance reports are solely moved to the next status, such as **In Progress** by colleagues in the office using CFM Disturbance. The changes made in the office are then reflected on the **Disturbances** tab.

The following information is displayed for each entry:

- Title
- Disturbance category
- Planned corrective action
- Date
- Report number
- Number of comments
- Disturbance report was marked as critical
- Number of attachments

5.1. Create Disturbance Reports

If you want to report a new disturbance that occurred on board your vessel, proceed as follows.

1. Login to your CSM client.
2. Open the **Disturbance** tile.
3. On the **Disturbances** tab, choose **Add**.

> **NOTE**
>
> To edit an existing disturbance report, choose an entry from one of the cards.

4. In the dialog window, specify the following information:
   - **Title**

     Enter a title that briefly outlines the reason for the disturbance report.

   - **Issuer**

     Enter the name of the person who reported the disturbance.

     > **NOTE**
     >
     > If you are using CSM Crewing, the name of the issuer is filled automatically.

   - **Is Critical**

     Set this checkbox, if the disturbance is critical and must be dealt with urgently.

   - **Manufacturer**

     Enter the name of the manufacturer of the device that is involved in the disturbance.

   - **Device Type**

     Specify the device that was affected by the disturbance further and enter the relevant device type in this field.

   - **Serial Number**

     If available, enter the serial number of the device in this field.

   - **Description**

     Describe the disturbance that occurred in more detail in this field.

   - **Category**

     Select the relevant disturbance category from the drop-down list.

   - **Requisition Numbers**

     You can manage requisition numbers once you saved the disturbance report with the basic information.

     Choose **Add** and enter the relevant requisition number for the disturbance report.

     > **NOTE**
     >
     > If you are just creating a new disturbance report, the system displays the message: **Save the report before adding a requisition number.**.

   - **Device**

     Select the relevant device from the drop-down list.

- **Corrective Actions Plan**

  Select the corrective action to solve the disturbance from the drop-down list.
  You can choose from one of the following options:

  > **NOTE**
  >
  > The field **Corrective Actions Response** displays the decision made by the person in charge in the office using CFM Disturbance. Based on the planned corrective action, the office decides how to proceed and the data is then sent back to the vessel with the next synchronization.

  - **Supply Spare**

  - **Arrange Service**

  - **Repair on Drydock**

  - **Request Maker Information**

  - **Guarantee Claim**

  - **Reconditioning / Redelivery**

  - **Support**

  - **Repair by Crew**

- **Description**

  You can enter a remark for the corrective actions plan in this field.

- **Attachments**

  In this area, you can manage the attachments relevant for the disturbance report.

- **Comments**

  You can use this area to communicate with the colleagues in the office by posting a new message, for example.

5. Choose **Save** to save your entries.

5.1.1. Add Attachments

To add attachments to a disturbance report, proceed as follows.

1. Login to your CSM client.

2. Open the **Disturbance** tile.

3. On the **Disturbances** tab, choose a disturbance report from one of the cards.

4. In the **Attachments** area, choose **Add**.

5. Choose the relevant file that you want to attach to the disturbance report from your local device.

6. A dialog window appears allowing you to edit the name of the attachment:

7. Choose **Save** to add the attachment to the disturbance report.

5.1.2. Add Comments

To communicate with colleagues on shore using CFM Disturbance, proceed as follows.

1. Login to your CSM client.

2. Open the **Disturbance** tile.

3. On the **Disturbances** tab, choose a disturbance report from one of the cards.

4. In the **Comments** area, enter your message in the **Post a new message** field.

> ⚲ **TIP**
>
> You have a few options to change the view of the **Comments** area:
>
> *   **Maximize**
>
>   In case a lot of comments and activities exist for the disturbance report, you can enlarge the view by choosing **Maximize**.
>
> *   **Copy to Clipboard**
>
>   To copy the text you entered as a comment to your clipboard and reuse it, choose **Copy to Clipboard**.
>
> *   **Show Activities Only**
>
>   To display the changes that were made to the disturbance report, only, choose **Show Activities Only**.
>
> *   **Show Comments Only**
>
>   To display the comments left for the disturbance report, only, choose **Show Comments Only**.

5. Choose **Send** to add the comment to the disturbance report.

Result

The comment was added to the disturbance report and will by synchronized to CFM Disturbance with the next synchronization cycle.

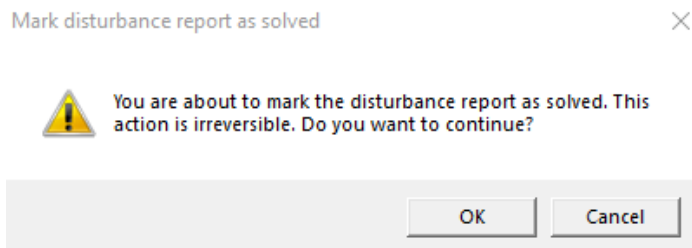## 5.2. Close Disturbance Reports

Once disturbances were solved, the corresponding disturbance reports must be closed in CSM Disturbance.

To do so, proceed as follows.

1. Login to your CSM client.

2. Open the **Disturbance** tile.

3. On the **Disturbances** tab, choose a disturbance report from the **In Progress** or **Docking** card.

4. Choose **Disturbance Solved** in the dialog window.

5. Confirm the warning message.

Mark disturbance report as solved   ✕

⚠ You are about to mark the disturbance report as solved. This action is irreversible. Do you want to continue?

OK   Cancel

Result

The disturbance report is closed and archived and can now be viewed on the **Closed** tab.

6. Activities

The **Activities** tab provides an overview of all changes that have been made to disturbance reports.

The entries are sorted by date and are grouped into changes carried out

• **Today**

• **This Year**, and

• **Previous**.

Additionally, it is indicated whether a comment was left by the crew using CSM Disturbance on board the vessel or by the colleagues in the office using CFM Disturbance as the activities start with **Shore**.

By choosing an entry from the list, you can view the details of the respective disturbance report and if possible, make any changes.

7. Closed

The **Closed** tab provides an overview of the disturbance reports that have already been processed and were thus closed.

You can filter the list of closed reports by date using the date picker (📅). It also allows you to filter for disturbance reports that lie in the past.

By default, the system shows all disturbance reports that were closed 6 months prior to the current date.

By choosing an entry from the list, you can view the details of the respective disturbance report.

The following information is displayed for an entry in the list:

• Title
• Disturbance category
• Planned corrective action
• Report number
• Date
• Number of comments
• Disturbance report was marked as critical

8. 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
v.2.0.0	• New dashboard is now available	20.12.2022	Ricardo da Costa Lima
v.1.0.0	• Initial creation of user guide	23.03.2021	[Inactive]