Cloud Fleet Manager

MANUAL

CSM PROCEDURES

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1. About This Guide

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

This application allows you to manage the procedures relevant for your vessel. The dashboard helps you to keep track of the tasks that need to be carried out.
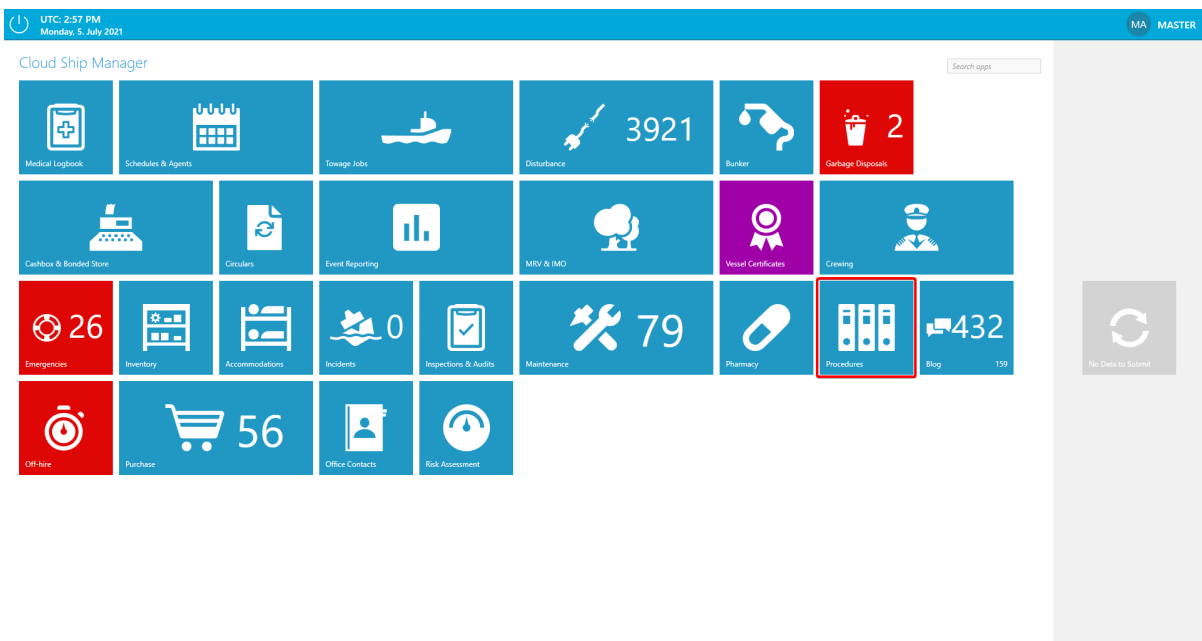
The app consists of the following tabs:

- **Dashboard**
- **Procedures**

> ⬛ **NOTE**
>
> If you cannot access the **Procedures** 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 Procedures 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.
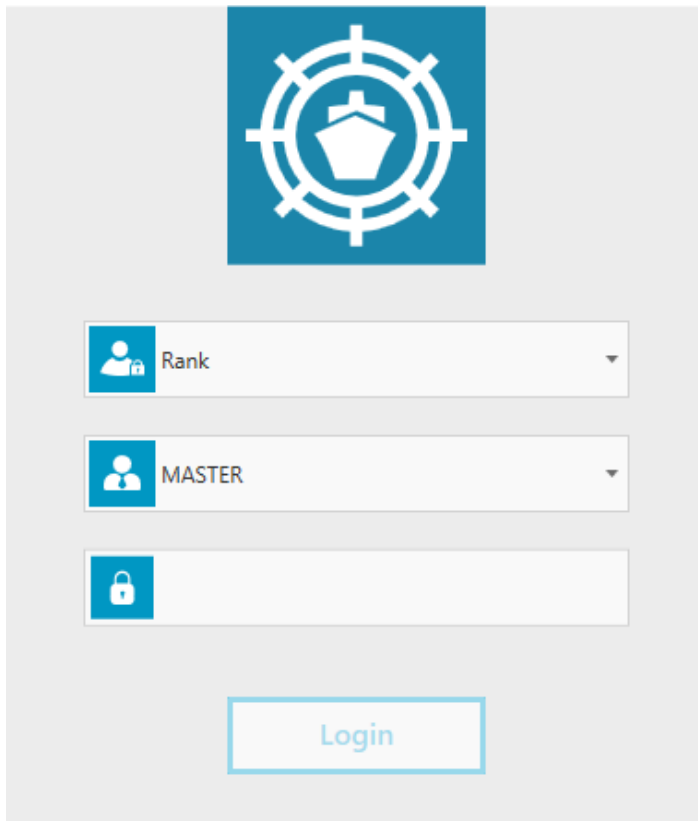 Another prerequisite is that you must be planned for an assignment so that your data are synchronized to CSM.

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.
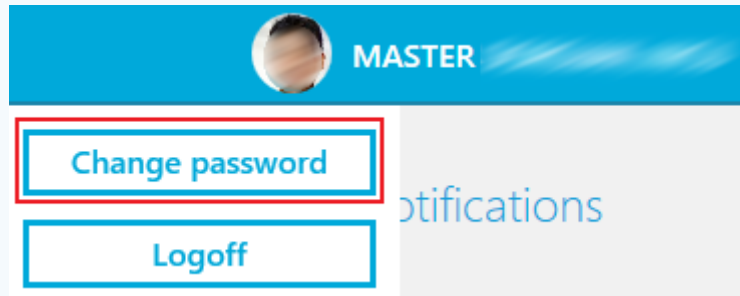
4.   Enter the corresponding password.

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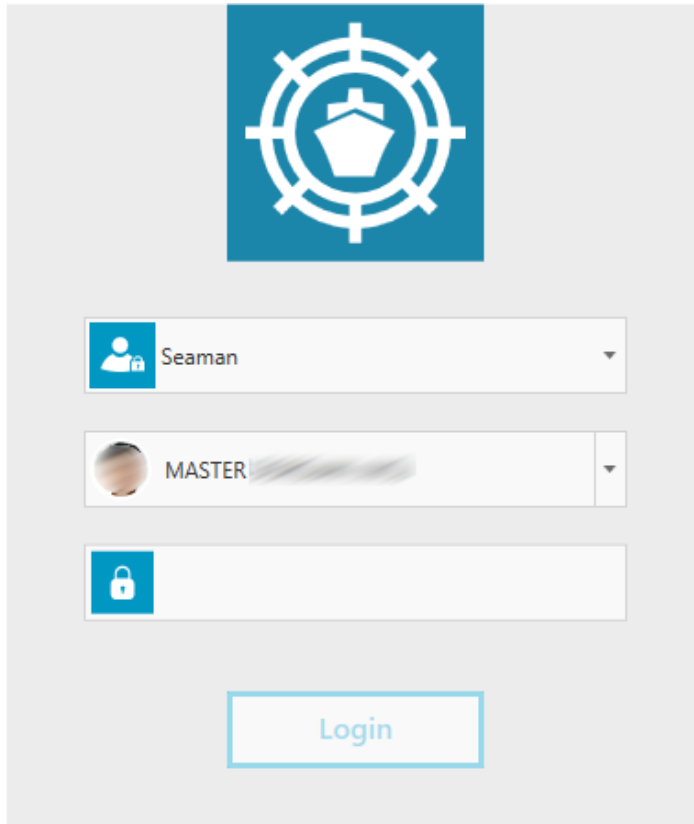
5. Choose **Login** to login to the CSM client.

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.

4. Process Overview

To provide you with an idea of the standard process a procedure is undergoing, the following graphic was created:

1. A procedure is created by the colleagues in the office using CFM Procedures.
2. The form relevant for the procedure is uploaded as an attachment in CFM Procedures.
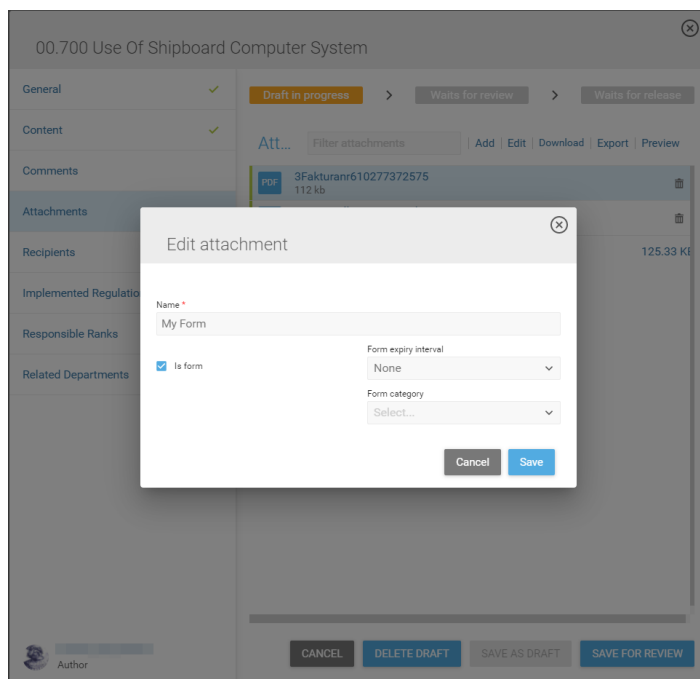
3. The vessel to which the procedure and corresponding form should be sent is specified in the **Recipients** section in CFM Procedures.
4. The procedure is then synchronized to the selected vessels using CSM Procedures.
5. The procedures that need to be carried out are checked using the **Dashboard** cards or by choosing a procedure from the **Procedures** tab in CSM Procedures, directly.
6. On the **Attachments and Pending Forms** subtab, the form that needs to be filled out is downloaded to a local device.
7. The form is filled out locally.
8. The completed form is uploaded back to CSM Procedures.

5. Dashboard

The **Dashboard** tab in CSM Procedures provides you with an overview of the recent changes made to your procedures including newly added comments on procedures and forms. Forms that are still pending and require action to be taken are also displayed on this tab.

The tab consists of the following cards:

- **Recently Changed Procedures**

  Lists all procedures that were recently changed.

  By choosing an entry from the screen you are automatically redirected to the detail screen of the corresponding procedure.

  The following information is provided on each entry:
  - Title of the procedure

  - Category of the procedure

  - Content of the procedure

  - User that changed the procedure

  - Number of attachments

  - Revision number

  - Date on which the procedure was changed

- **Pending Forms**

  Lists all forms that are pending for a certain number of days. The forms are sorted by the duration that they've been pending.

  By choosing an entry from the list you are automatically redirected to the detail screen of the corresponding procedure where you can edit the form.

  The following information is provided on each entry:
  - Title of the form

  - Title of the procedure

  - Category of the procedure

  - Number of days the form is pending

- **New Procedure Comments**

  Lists all comments that were left on the different procedures.

  By choosing an entry from the list you are automatically redirected to the corresponding section on the detail screen.

  The following information is provided on each entry:
  - Title of the procedure

- Comment
- Name of the vessel
- Date on which the comment was left

- **New Form Comments**

  Lists all comments that were left on the different forms.

  By choosing an entry from the list you are automatically redirected to the corresponding section on the detail screen.

  The following information is provided on each entry:

  - Title of the form

  - Comment

  - Name of the vessel

  - Date on which the comment was left

6. Procedures

The **Procedures** tab provides an overview of all procedures available for your vessel. The procedures are sorted and grouped by category.

The categories in the sidebar on the left indicate how many procedures exist for each category.

For each procedure belonging to a category the following information is displayed:

> 💡 **TIP**
> By choosing a procedure from a category, you can navigate to the detail screen of the procedure to see further details and to update any corresponding data.

- Title of the procedure
- Author of the procedure
- Number of attachment
- Number of revisions
- Date on which the procedure was created

The following additional features are available from this tab:

- Search

  Enter a search term, such as the title of a procedure, in the search bar above the categories to find a specific procedure faster.

  To use the advanced filter options, choose the arrow icon (⌄) and filter the procedures for the following parameters:

  - **From Date**

    Enter the date on which the procedure was created to filter the tab for procedures created on that date.

  - **Ranks**

    Set the checkbox for the ranks for which you want to find all procedures.

    By default, all ranks are pre-selected by the system.

- **Show Flat List**

  If you'd rather see a list of all procedures available for your vessel sorted in alphabetical order, choose **Show Flat List**.

- Download

  Download the table of contents to an MS Word file.

  Choose the **Download** icon (⤓) above the categories.

6.1. Procedures - Detail Screen

The detail screen of a procedure provides further insights into the components of a procedure.

The detail screen is divided into the following subtabs:

- **General**

  Displays general information on the procedure and allows you to export the procedure to a PDF file.

  You can also add comments on the procedure.

  The following details are displayed on this subtab:

  - Title of the procedure

  - Parent and sub-categories of the procedure

  - Revision number

  - Release date

  - Author of the procedure

  - Content of the procedure

  - Responsible ranks

  - Comments

    You can add comments on procedures. These comments are then displayed on the **New Procedure Comments** card on the **Dashboard** tab.

- **Attachments and Pending Forms**

  Displays the corresponding attachments, forms, pending forms and completed forms belonging to the procedure.

  You can request the files from the shore side by choosing the **File** icon (📄).

  > 🗒 **NOTE**
  >
  > If the files should be directly sent to the vessel together with the procedure without the need to individually request them, contact the support team.

  The following information on the files is displayed:
  - File type

  - Title of the file

  - File size

  - Date

  You can also upload forms to CFM Procedures from this subtab by choosing the **Upload** icon (⬆) for the form that you want to upload.

- **Completed Forms**

  Lists forms of the selected procedure that have already been completed. Additionally, the corresponding comments are also displayed.

And you can also add comments to the completed forms. The comments are then displayed on the **New Form Comments** card on the **Dashboard** tab.

The forms are grouped by the form category defined in CFM Procedures.

The following information is displayed on each form:

- Color code indicating whether a form is invalid or valid

- Title of the form

- Date on which the form was created

- Form is valid or invalid

- Number of comments

- Download file

6.1.1. Complete Forms

To complete forms of procedures, proceed as follows.

Forms of procedures are filled out in certain intervals.

1. Login to your CSM client.

2. Open the **Procedures** tile.

3. There are two options to process a form:

   a. Go to the **Dashboard** tab and choose the form that you want to complete from the **Pending Forms** card, or

   b. Go to the **Procedures** tab, choose the category from the sidebar and the corresponding procedure from the center of the screen and double-click it to navigate to the detail screen.

4. Go to the **Attachments and Pending Forms** subtab.

5. Choose the **Attachment** icon (📄) in the **Forms** section.

> 💡 **TIP**
> Forms must first be requested from the shore side (CFM Procedures) to download and edit them on board the vessel.
>
> a. Choose the **Attachment** icon (📄).
>
> b. Go to the app module overview and choose **Submit changes**.
>
> Contact the support team, if the forms should be directly available on the vessel without the need to request them.

6. Then, choose **Just Download** to download the file to your local device or **Fill In** to directly download and open the form.

7. Fill in all required data and save the form.

8. Choose the **Upload** icon (⬆) in the **Forms** section to upload the completed form.

9. Choose whether you want to mark the form as completed.
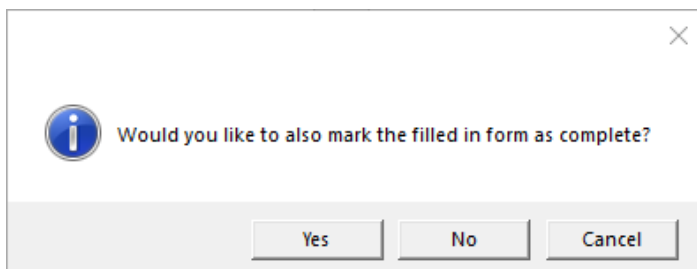
10. If you choose **Yes**, you can optionally add a comment to the procedure.

Result and Next Steps

The uploaded form is now listed in the **Recently Completed Forms** section on the **Attachments and Pending Forms** subtab.

> 📝 **NOTE**
> All forms that were already downloaded and saved, but have not been uploaded to CSM Procedures again are listed in the **Pending Forms** section on the **Attachments and Pending Forms** subtab.

The following functions might be relevant to you as well:

- You can mark the form as invalid in the **Pending Forms** and **Recently Completed Forms** section, if some data in the forms are incorrect, for example.
- Additionally, you can edit a form that was uploaded to CSM Procedures, but was not marked as completed. Choose the form from the **Pending Forms** section and choose **Edit**.

6.1.2. Delete Forms

To delete forms from a procedure, proceed as follows.

1. Login to your CSM client.
2. Open the **Procedures** tile.
3. Go to the **Procedures** tab.
4. Choose the category to which the procedure belongs from the sidebar.
5. Double-click the procedure from which you want to delete a form.
6. On the detail screen go to the **Completed Forms** subtab and choose the form that you want to delete from the list.
7. Choose **Delete**.
8. Confirm the warning message.