



Cloud Fleet Manager

MANUAL

CSM SCHEDULE & AGENTS

2022-09-23

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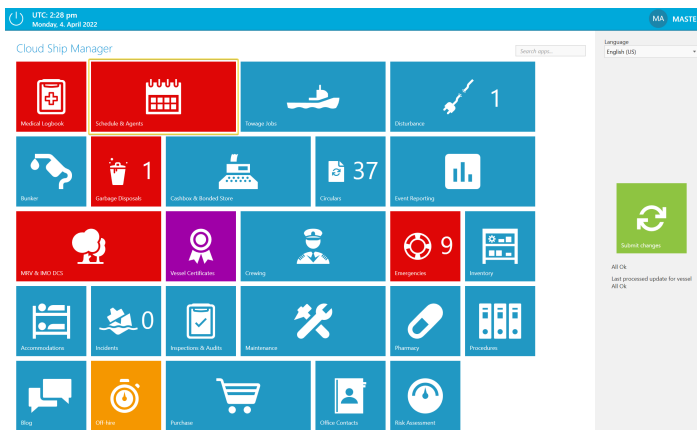
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1. About This Guide

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

CSM Schedule & Agents allows you to create past, current, or future schedules and transits for your vessel. In addition, you can add new agents and also assign these on board your vessel. These schedules are then displayed in the Portal as well as the Partner Portal to provide all parties involved with the latest information from a single source of information.



The app consists of the following tabs:

- [Dashboard](#)
- [Schedule](#)
- [Agents](#)



NOTE

If you cannot access the [Schedule & Agents](#) 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 Schedule & Agents, 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.

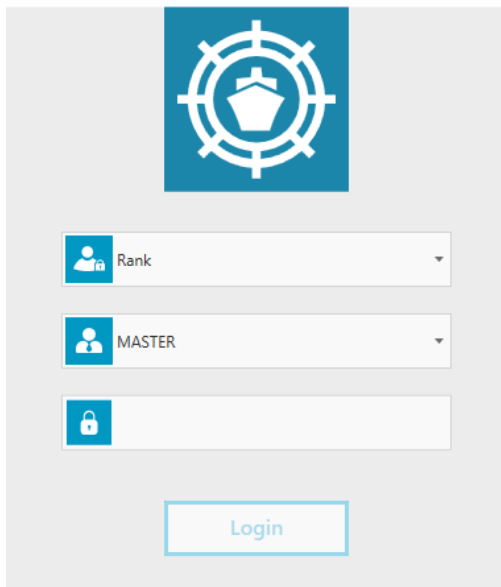
For this login option to work, your user account must be activated and the corresponding permission rights must be assigned to the rank the seafarer is holding during the current assignment. The seafarer login serves as a personal identification.

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](#).

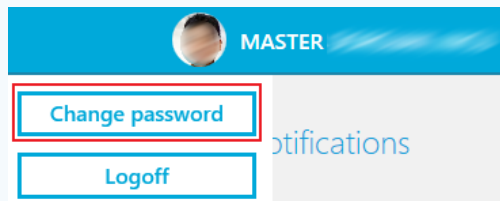
Choose the  crossed-out eye icon to view your entered password and select the  eye icon to hide your password again.



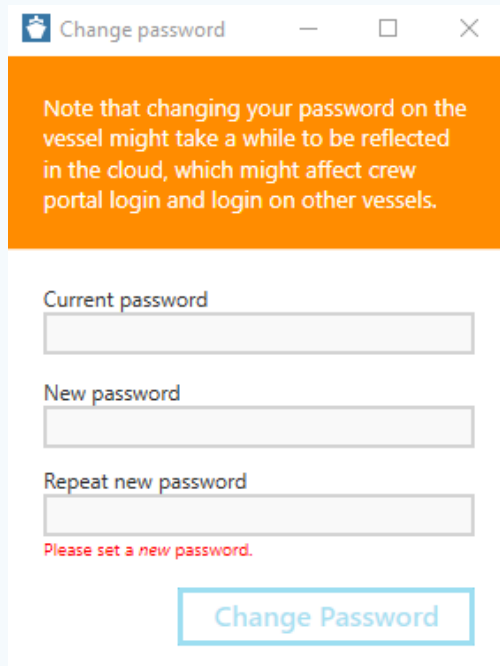
TIP

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.



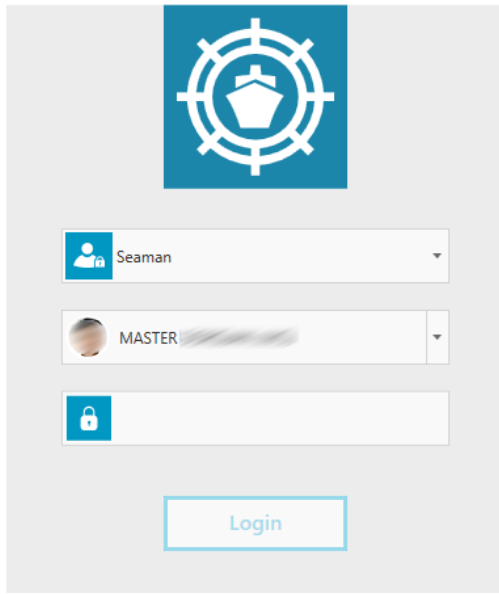
3. Enter your new password.
4. Repeat your new password.
5. Choose [Change Password](#) to save your new password.

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.



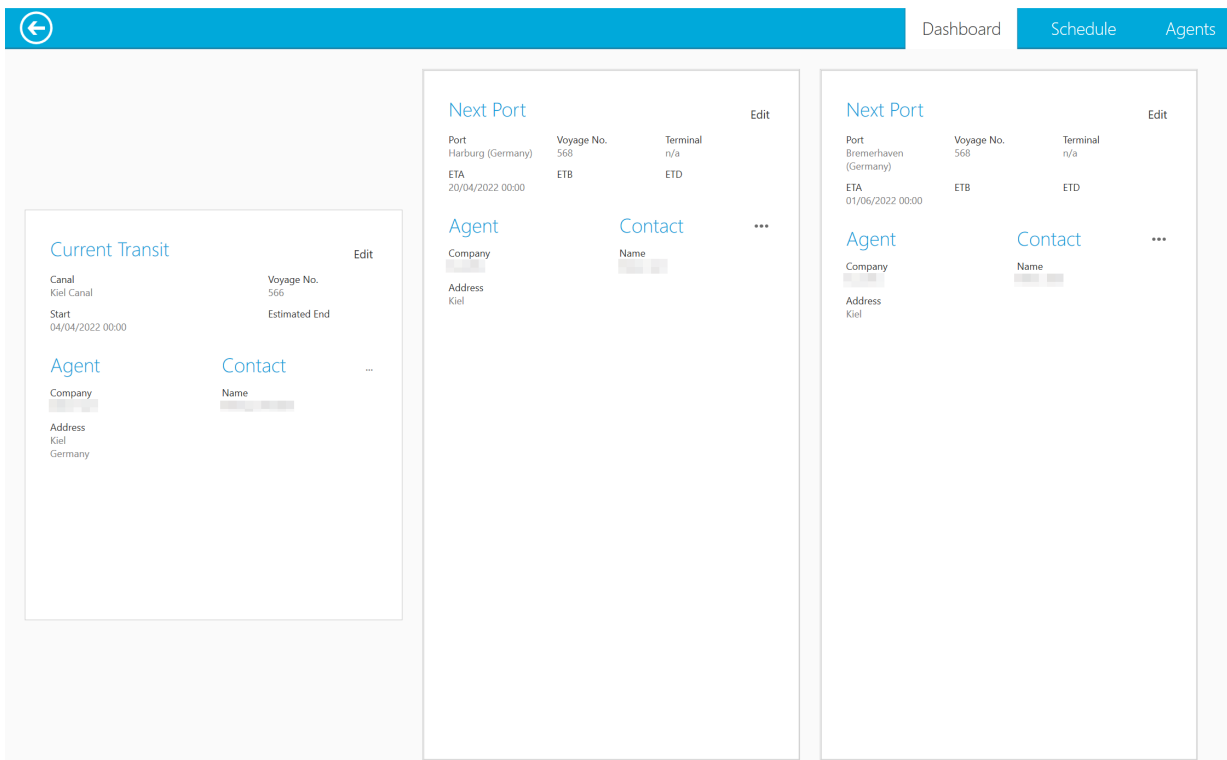
NOTE

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

The dashboard tab provides an overview of the three currently most relevant schedules and transits. Each entry is displayed on its card. The information given varies depending on whether the schedule, respectively transit, was in the past, is currently ongoing or is scheduled in the future.



The following information per entry is provided:




- Transit
 - The following information is displayed on cards that reflect a transit.
 - Canal
 - Displays the transits canal.
 - Voyage No.
 - Displays the internal voyage number.
 - (Estimated) Start
 - Displays the (estimated) start date of the transit, depending on whether it is currently ongoing or scheduled for the future.
 - (Estimated) End

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Displays the (estimated) end date of the transit, depending on whether it ended already or is scheduled for the future.

- Agent
 - Displays information on the assigned agent.
 - Company
 - Displays the agent's company.
 - Address
 - Displays the agent's company address.
- Contact
 - Displays information on the contact of the assigned agent.
 - Name
 - Displays the name of the contact.
- Schedule
 - The following information is displayed on cards that reflect a schedule.
 - Port
 - Displays the arrival port of the schedule.
 - Voyage No.
 - Displays the internal voyage number.
 - Terminal
 - Displays the terminal of the arrival port.
 - ETA / TOA
 - Displays the (estimated) time of arrival of the schedule, depending on whether the vessel arrived already at the port of call or not.
 - ETB
 - Displays the estimated time of berthing.
 - ETD / TOD
 - Displays the (estimated) time of departure, depending on whether the vessel departed already from the port of call or not.
 - Agent
 - Displays information on the assigned agent.
 - Company
 - Displays the agent's company.
 - Address
 - Displays the agent's company address.
 - Contact
 - Displays information on the contact of the assigned agent.
 - Name
 - Displays the name of the contact.
 - Icon
 - The following icons may be displayed:


CSM Schedule & Agents


-  - The arrow down icon indicates that the vessel is loading cargo.
-  - The arrow up icon indicates that the vessel is discharging cargo.
-  - The fuel icon indicates that bunkering is planned.



NOTE

Selecting **Edit** on a card allows you to apply necessary changes.

To add an agent to a schedule or transit, choose the  plus icon.

You can also utilize the  three-dot menu on cards that already have an agent assigned. This allows you to:

- **Switch Agent**
- **Edit Agent**
- **Remove Agent**

5. Schedule

The schedule tab displays a detailed and chronological overview of your vessel's voyages. The tab is divided into two cards, current and history. The latter contains the past and cancelled schedules. All other schedules are listed in the current card. The information displayed per entry varies depending on which card they are included in.

The tab consists of the following cards:

- Current
- History

Voyage	Port	Country	Terminal	IOPS Security Level	ETA	ETB	ETD	TOA
566	Kiel Canal				01/04/2022		03/04/2022	02/04/2022
567	Bremerhaven	Germany	n/a	n/a	01/06/2022			

The following general features are available on both cards:

- **Edit**
Select an entry and select **Edit** to apply necessary adjustments.
- **Export**
Select **Export** and specify the time range to create an Excel file of the currently selected card.



NOTE

Red marked entries are considered transits.

5.1. Current

The current card provides an overview of current and future schedules, respectively transits in a chronological order.






Voyage	Port	Country	Terminal	ISPS Security Level	ETA	ETB	ETD	TOA	
566	Kiel Canal				01/04/2022		03/04/2022	02/04/2022	
567	Bremerhaven	Germany	n/a	n/a	01/06/2022				

Buttons at the bottom: Add Transit, Add Schedule

The following information per entry is provided:

- **Voyage**
Displays the internal voyage number of the schedule or transit.
- **Port**
Displays the port of call.
- **Country**
Displays the country of the port of call.
- **Terminal**
Displays the arrival terminal of the port of call.
- **ISPS Security Level**
Displays the ISPS security level of the port of call.
- **ETA**
Displays the estimated time of arrival at the port of call.
- **ETB**
Displays the estimated time of berthing at the port of call.
- **ETD**
Displays the estimated time of departure at the port of call.
- **TOA**
Displays the actual time of arrival at the port of call.
- **Icons**
The following icons may be displayed:

CSM Schedule & Agents

-  - The arrow down icon indicates that the vessel is loading cargo.
-  - The arrow up icon indicates that the vessel is discharging cargo.
-  - The fuel icon indicates that bunkering is planned.
-  - The person icon indicates that an agent is already assigned. Click on the icon for more information.
-  - The circled arrow icon indicates that the schedule or transit is not synced with the shoreside.

5.1.1. Add Transit

To add a transit to your vessel, proceed as follows

1. Login to the CSM client.
2. Open the **Schedule & Agents** tile.
3. Navigate to the **Schedule** tab and open the **Current** card.
4. Select **Add Transit** and provide the requested information:



NOTE

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

- Canal
Select the transited canal from the drop-down menu.
- Voyage Number
Enter the voyage number of the transit.
- Estimated Start
Select the date picker to specify the estimated start of the transit.
- Estimated End
Select the date picker to specify the estimated end of the transit.
- Start
Select the date picker to specify the actual start of the transit.
- End
Select the date picker to specify the actual end of the transit.
- Agent
Select an agent to assign them to the transit.



NOTE

Select **Create New** if the applicable agent is not available. For more information, see [Add Agent \[20\]](#).

- Contact
Select the contact of the assigned agent.

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

The screenshot shows a form titled 'Add Transit' with a back arrow icon. The form contains the following fields:

- Canal***: A dropdown menu.
- Voyage Number***: A text input field with a red border.
- Estimated Start**: A date input field with a calendar icon.
- Estimated End**: A date input field with a calendar icon.
- Start**: A date input field with a calendar icon.
- End**: A date input field with a calendar icon.
- Agent**: A dropdown menu.
- Contact**: A dropdown menu.
- Save**: A blue button at the bottom right.

5.1.2. Add Schedule

To add a schedule to your vessel, proceed as follows.

1. Login to the CSM client.
2. Open the **Schedule & Agents** tile.
3. Navigate to the **Schedule** tab and open the **Current** card.
4. Select **Add Schedule** and provide the requested information:



NOTE

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

- **Voyage Number on Arrival**
Enter the internal voyage number on arrival.
- **Voyage Number on Departure**
Enter the internal voyage number on departure.
- **Port**
Specify the port of call for the schedule.
- **Terminal**
Specify the arrival terminal at the port of call.
- **ISPS Security Level**
The ISPS Security Level is automatically fetched, based on the given port.



TIP

You can edit the ISPS security level of current schedules. Changed ISPS security levels can be recognized as they are color coded in orange.

- Agent

Select the assigned agent from the drop-down menu.



NOTE

Select [Create New](#) if the applicable agent is not available. For more information, see [Add Agent \[20\]](#).

- Contact

Select the contact of the assigned agent from the drop-down menu.



NOTE

Select [Create New](#) and specify the new contact if the applicable contact is not available.

- Vessel Takes Bunker

Select the checkbox if the vessel is bunkering during the schedule.

- Loading Cargo

Select the checkbox if the vessel is loading cargo during schedule. Specify the following information:

- Cargo

Select the cargo that was loaded from the drop-down menu.



NOTE

If a specific cargo type is missing, reach out to our support to add it to the system.

- Quantity

Specify the loaded quantity in metric tons.

- Loading Date

Select the date picker to specify the date on which the cargo was loaded.

- Discharging Cargo

Select the checkbox if the vessel is discharging cargo during the schedule.

- Cargo

Select the cargo that was discharged from the drop-down menu.




NOTE

If a specific cargo type is missing, reach out to our support to add it to the system.

- Quantity
Specify the discharged quantity in metric tons.
- Discharging Date
Select the date picker to specify the date on which the cargo was discharged.
- ETA
Select the date picker to specify the estimated time of arrival.
- ETD
Select the date picker to specify the estimated time of departure.
- ETB
Select the date picker to specify the estimated time of berthing.
- EO SP
Select the date picker to specify the end of the sea passage.




NOTE

Select the  fuel icon to specify the bunker state during the EO SP.

- COSP
Select the date picker to specify the commencement of the sea passage.




NOTE

Select the  fuel icon to specify the bunker state during the COSP.

- TOA
Select the date picker to specify the actual time of arrival at the port.




NOTE

Select the  fuel icon to specify the bunker state during the TOA.

- TOD
Select the date picker to specify the actual time of departure from the port.



NOTE

Select the  fuel icon to specify the bunker state during the TOD.

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- Remark
Provide any additional remarks relevant to the schedule.
- Cancelled
Select the checkbox if the schedule is cancelled. Cancelled schedules are later recognisable as they are struck through.

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

← Add Schedule

General

Voyage Number on Arrival:

Voyage Number on Departure:

Port:

ISPS Security Level:

Agent:

Contact:

Operations

Vessel Takes Bunker

Optional Dates:

Loading Cargo

Discharging Cargo

Dates

ETA:

ETD:

ETB:

EOSP:

TOA:

COSP:

TOD:

Remark:

Cancelled

Enter the COSP date.

Enter the EOSP date.

Enter the TOA date.

Enter the TOD date.

5.2. History

The history card provides a chronological overview of previous and cancelled schedules and transits at a glance.

← Dashboard Schedule Agents

Schedule

Voyage	Port	Country	Terminal	ISPS Security Level	ETA	ETD	TOA	TOD
566	Setubal	Portugal	YILPORT		30/08/2022			
911	Panama Canal				17/05/2022			
567	Harburg	Germany	Harburg Kai		04/04/2022	29/04/2022	04/04/2022	05/04/2022
566	Hamburg	Germany	EUROGATE 1 (Normal)		30/03/2022	01/04/2022		
511	Dardanelles				30/03/2022	01/04/2022		
522	Suez Canal				30/03/2022	31/03/2022		
568 / 569	Harburg	Germany	n/a		20/04/2021		22/04/2021	25/04/2021
560 / 561	Tanjung Kluang	Indonesia	n/a		01/02/2020	16/04/2020	05/02/2020	16/04/2020

The following information per entry is provided:

- Voyage
Displays the internal voyage number of the schedule or transit.
- Port
Displays the port of call.

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- Country
Displays the country of the port of call.
- Terminal
Displays the arrival terminal of the port of call.
- ISPS Security Level
Displays the ISPS security level of the port of call.
- ETA
Displays the estimated time of arrival.
- ETD
Displays the estimated time of departure.
- TOA
Displays the actual time of arrival.
- TOD
Displays the actual time of departure.

6. Agents

The agents tab provides an overview of all agents, grouped and sorted according to the scheduled ports in a panel on the left hand side. The center of the screen contains general information, as well as assigned ports of an agent. A card on the right hand side captures contacts of the selected agent.

The list of agents is grouped according to the following parameters:

- **Planned Ports**
Lists all scheduled ports and their assigned agents.
- **Other Ports**
Lists all ports and their assigned agents that currently do not have a schedule or transit.
- **No Ports**
Lists all agents that do not have a port assigned.



TIP


Filter the list of agents by providing the name of the desired agent into the text box above the list.

6.1. Add Agent

To add an agent, proceed as follows.

1. Login to your CSM client.

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2. Open the **Schedule & Agents** tile.
3. Navigate to the **Agents** tab.
4. Select the  plus icon and provide the requested information:
 - **Company Name**
Enter the company's name of the agent.
 - **Charterer**
Select the applicable charterer from the drop-down menu.
 - **Is Charter Agent**
Select the checkbox if the agent is considered a charter agent.
 - **Is Crewing Agent**
Select the checkbox if the agent is considered a crewing agent.
 - **Is Husband Agent**
Select the checkbox if the agent is considered a husband agent.
 - **Is Owner Agent**
Select the checkbox if the agent is considered an owner agent.
 - **Is Vessel Agent**
Select the checkbox if the agent is considered a vessel agent.
 - **Country**
Enter the country in which the agent is located.
 - **City**
Enter the city in which the agent is located.
 - **Postal Code**
Enter the postal code of the city in which the agent is located.
 - **Street**
Enter the street name in which the agent is located.
 - **Last Name**
Enter the last name of the contact from the agent.
 - **First Name**
Enter the first name of the contact from the agent.
 - **Nationality**
Select the contact's nationality from the drop-down menu.
 - **Sex**
Select the gender of the contact from the drop-down menu.
 - **Is Obsolete**
Select the checkbox if the contact is considered obsolete.
 - **Phone**
Specify the contact's phone number.
 - **E-Mail**
Specify the contact's E-Mail address.

- **Mobile**
Specify the contact's mobile phone number.
- **Fax**
Specify the contact's fax number.
- **Agent Remark**
Provide any additional remarks relevant to the agent.



NOTE

Select **Add** to define further communication methods.

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

Add Schedule Agent

Agent

Company Name * Is Charter Agent
 Is Crewing Agent
 Is Husband Agent
Charterer: 0 Charterers Is Owner Agent
 Is Vessel Agent
Country: City:
Postal Code: Street:

Contact

Last Name: First Name:
Nationality: Unknown (--) Sex: Male
 Is Obsolete

Communication Add

PHONE: EMAIL:
MOBILE FAMILY: FAX:
Agent Remark:

Save

6.2. General

The general card captures basic information of the agent, such as agent type and location, which is defined when the agent is initially created.

However, this information can be edited anytime. To do so, simply apply the necessary adjustments and **Save**.

CSM Schedule & Agents

General

Company Name *	<input type="checkbox"/> Is Charter Agent
<input type="text"/>	<input checked="" type="checkbox"/> Is Crewing Agent
Charterer	<input type="checkbox"/> Is Husband Agent
2 Charterers	<input type="checkbox"/> Is Owner Agent
Country	<input type="checkbox"/> Is Vessel Agent
<input type="text"/>	City
Postal Code	Kiel
24109	Street
Agent Remark	Hauptstraße 1
<input type="text"/>	
	<input type="button" value="Save"/>

6.3. Ports

The ports card displays the assigned ports of an agent.

Ports	Add Delete
Bremerhaven (Germany)	
Harburg (Germany)	
Kiel (Germany)	
Kiel Canal (Germany)	

To add a port to the list of assigned ports, proceed as follows.



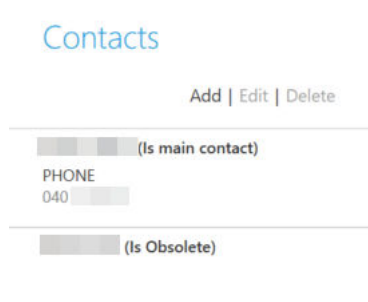
NOTE

You can also delete an assigned port. Simply select the port and choose **Delete**.

1. Login to your CSM client.
2. Open the **Schedule & Agents** tile.
3. Choose the **Agents** tab and select the desired agent from the panel on the left-hand side.
4. Navigate to the **Ports** card and select **Add**.
5. Enter the port and select it from the list.

6.4. Contacts

The contacts card displays a complete overview of all defined contacts of an agent, regardless of whether they are considered obsolete or not.



Contacts

Add | Edit | Delete

(Is main contact)

PHONE
040

(Is Obsolete)

To add a new contact, proceed as follows.

1. Login to your CSM client.
2. Open the **Schedule & Agents** tile.
3. Choose the **Agents** tab and select the desired agent from the panel on the left-hand side.
4. Navigate to the **Contacts** card.
5. Select **Add** and provide the requested information:



NOTE

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

- **Last Name**
Enter the last name of the contact.
- **First Name**
Enter the first name of the contact.
- **Nationality**
Select the contact's nationality from the drop-down menu.
- **Sex**
Select the gender of the contact from the drop-down menu.
- **Is Main**
Select the checkbox if the contact is considered the main contact of the agent.
- **Is Obsolete**
Select the checkbox if the contact is considered as obsolete.
- **Phone**
Specify the contact's phone number.
- **E-Mail**
Specify the contact's E-Mail address.
- **Mobile**
Specify the contact's mobile phone number.
- **Fax**
Specify the contact fax number.

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- **Add Communication**

Select **Add Communication** to add another communication method.

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