Oracle® Hospitality Cruise Crew Management System (CMS)

HR Management User Guide

Release 8.0.1.01

July 2016

ORACLE®

Preface

About This Document

Oracle Corporation acquired MICROS and its Fidelio Cruise products. All further references to Fidelio Cruise should be considered as Oracle Corporation.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received and any associated log files
- Screen shots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at http://docs.oracle.com/en/industries/hospitality/

Table of Contents

Person Relationships

- Add/Edit/Delete a person-relation
- Add/Edit/Delete an organization-relation

Preferences & Career Path

- Add/Edit/Delete a ship preference
- Add/Edit/Delete a ship-class preference
- Add/Edit/Delete a person preference
- Add/Edit/Delete a voyage preference
- Add/Edit/Delete a region preference
- Add/Edit/Delete a port preference
- Add/Edit/Delete career-path information (promotion-list)

Contract – Assignment – Events

- Add/Edit/Delete a crewmember’s CBA-type
- Add/Edit wage-information for a current assignment
- Add/Edit a new assignment
- Add/Edit a new event
- Add/Edit/Delete a cost-center for a crewmember’s assignment
- Edit a crewmember’s longevity

Travel

- Add/Edit/Delete a travel-document
- Add/Edit/Delete a crewmember’s home airport
- Add/Edit/Delete a Frequent Flyer Card
- Add/Edit/Delete a seating preference
- Add/Edit/Delete dietary restrictions
- View a crewmember’s current travel itinerary

Money Transfers

Licenses & Certifications

- Add/Edit/Delete a license or certificate

Courses

- Add/Edit/Delete a course/training

Person Skills

- Add/Edit/Delete a skill (language-skill in particular)

Section V: Scheduling/Tabular

Overview Tabular-Scheduler

Selection criteria

Schedule Headers

Scheduled repatriations-, scheduled embarkations- and available resources-box

Business-Scenarios

- Early repatriation – end of contract
- Early repatriation – compassionate leave with return after short leave (no replacement for interim period)
- Early repatriation – medical leave (recovery for next assignment)
- Adjusting a crewmember's availability-date
- Repatriation in a port which is not a pre-defined manning-port
- Contract-extension
- View available resources for a position
- Scheduling a replacement/resource for a repatriating crewmember
- Scheduling an overlap
- Scheduling a position-change

- Scheduling a ship-transfer
- Change of position-slot
- Scheduling a not-onboard assignment
- Modify a crewmember's repatriation-reason
- Add/Edit/Delete a cost-center for an assignment of a scheduled embarkation
- Add/Edit/Delete salary-information for a scheduled embarkation
- Rectify (delete) incorrect scheduling
- View a crewmember's biographic-, contract history- and relations-details
- View an embarking crewmember's licenses and certifications
- View an embarking/disembarking crewmember's travel request history
- View an embarking/disembarking crewmember's travel itinerary
- View an embarking/disembarking crewmember's hotel request
- View an embarking/disembarking crewmember's transfer request
- View an embarking/disembarking crewmember's contact-details
- Add/Delete a position-slot

Section V: Gantt Scheduler

Overview Gantt-Scheduler

Gantt-views

- Standard view
- View by Position Across the Fleet
- View by Person Across the Fleet

Selection criteria

Schedule Headers

Scheduled repatriations-, scheduled embarkations- and available resources-box

Business-Scenarios

- Early repatriation – end of contract
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- Contract-extension
- View available resources for a position
- Scheduling a replacement/resource for a repatriating crewmember
- Scheduling an overlap
- Scheduling a position-change
- Scheduling a ship-transfer
- Change of position-slot
- Scheduling a not-onboard assignment
- Modify a crewmember's repatriation-reason
- Add/Edit/Delete a cost-center for an assignment of a scheduled embarkation
- Add/Edit/Delete salary-information for a scheduled embarkation
- Rectify (delete) incorrect scheduling
- View a crewmember's biographic-, contract history- and relations-details
- View an embarking crewmember's licenses and certifications
- View an embarking/disembarking crewmember's travel request history
- View an embarking/disembarking crewmember's travel itinerary
- View an embarking/disembarking crewmember's hotel request
- View an embarking/disembarking crewmember's transfer request

- View an embarking/disembarking crewmember's contact-details
- Add/Delete a position-slot

Section V: Auto-Scheduler

General overview

Schedule Preferences

Processing of auto-scheduling

Viewing/reviewing a proposed schedule

Confirming a proposed schedule

Deleting a proposed schedule

Section VI: Table of Personnel

General overview

Managing the Table of Personnel

Section VII: Manning Ports Management

General overview

Managing the Manning Ports

Section VIII: Travel Management

Hotel and Transfers

Person Travel Data

Hotel Request Control

Transfers Requests Control

Travel Blocks

Section IX: Financials

Payroll Transactions To Ship

Section X: FAQ – Frequently asked questions

Section XI: Appendix

Section I: Getting started

This section will cover:

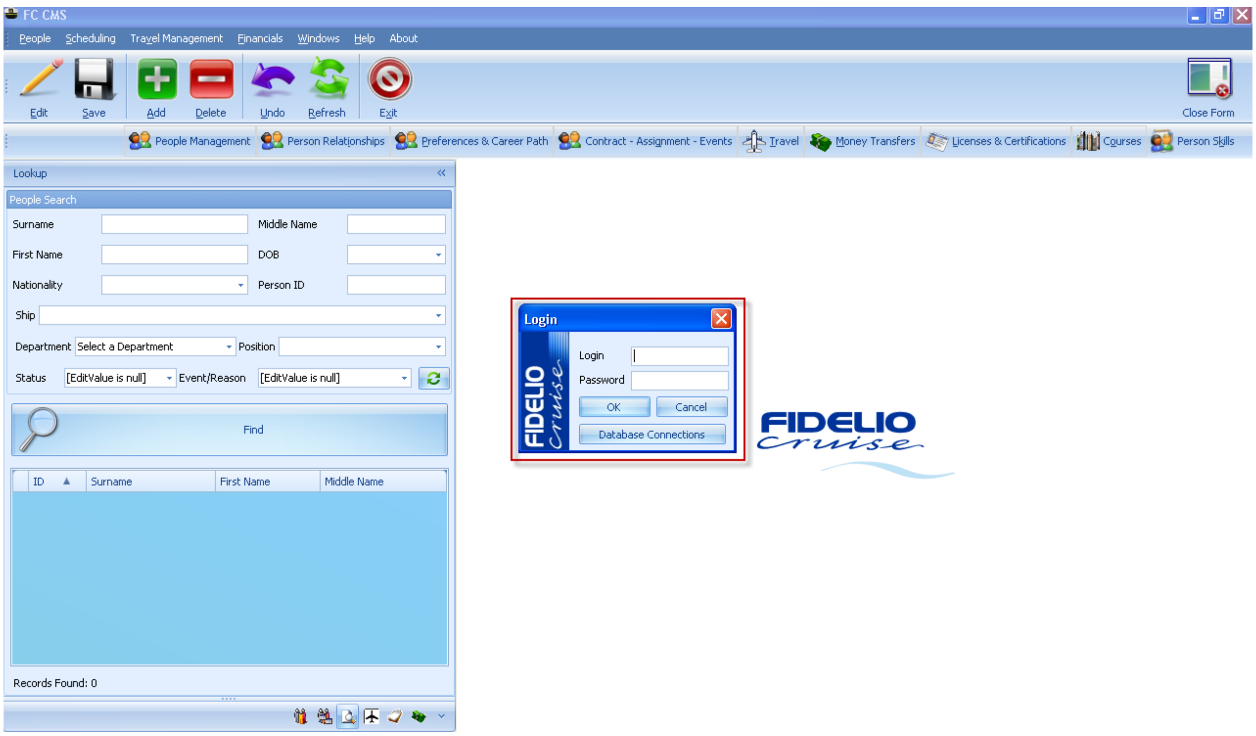
- ☐ Logging into CMS
- ☐ Logging out of CMS
- ☐ User Logins/Password/User-rights

Logging into CMS

❖ Locate the CMS HR Management-icon on your desktop

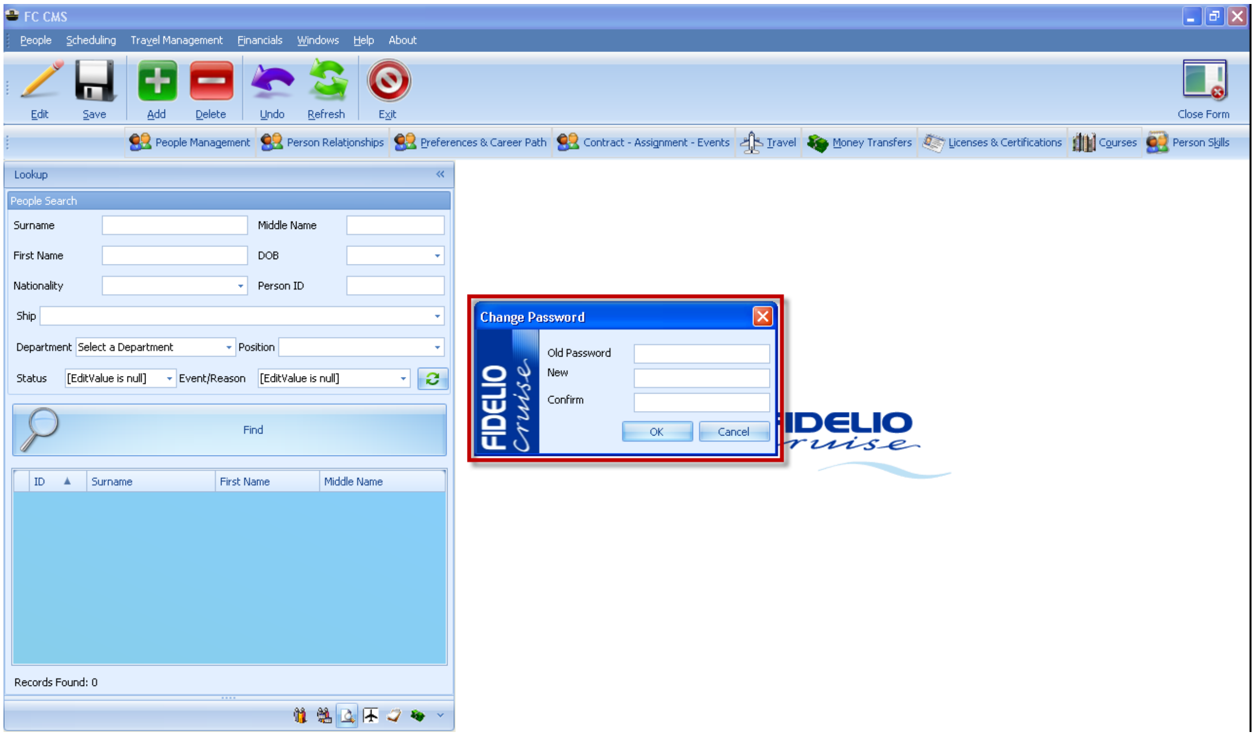
❖ Double-click on the icon

❖ The following screen will appear



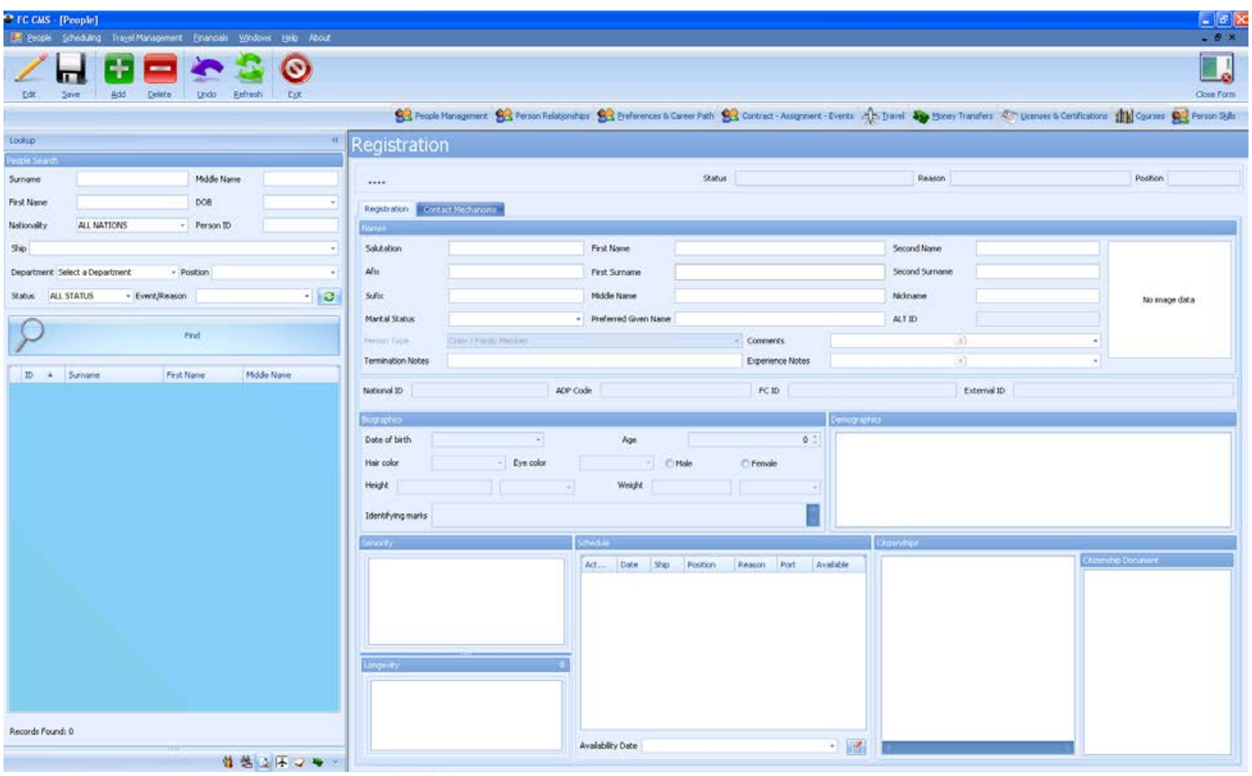
❖ Enter your login and password and click "OK" to access the application

❖ If you are logging in for the first time or if your password had to be reset, the following screen will display



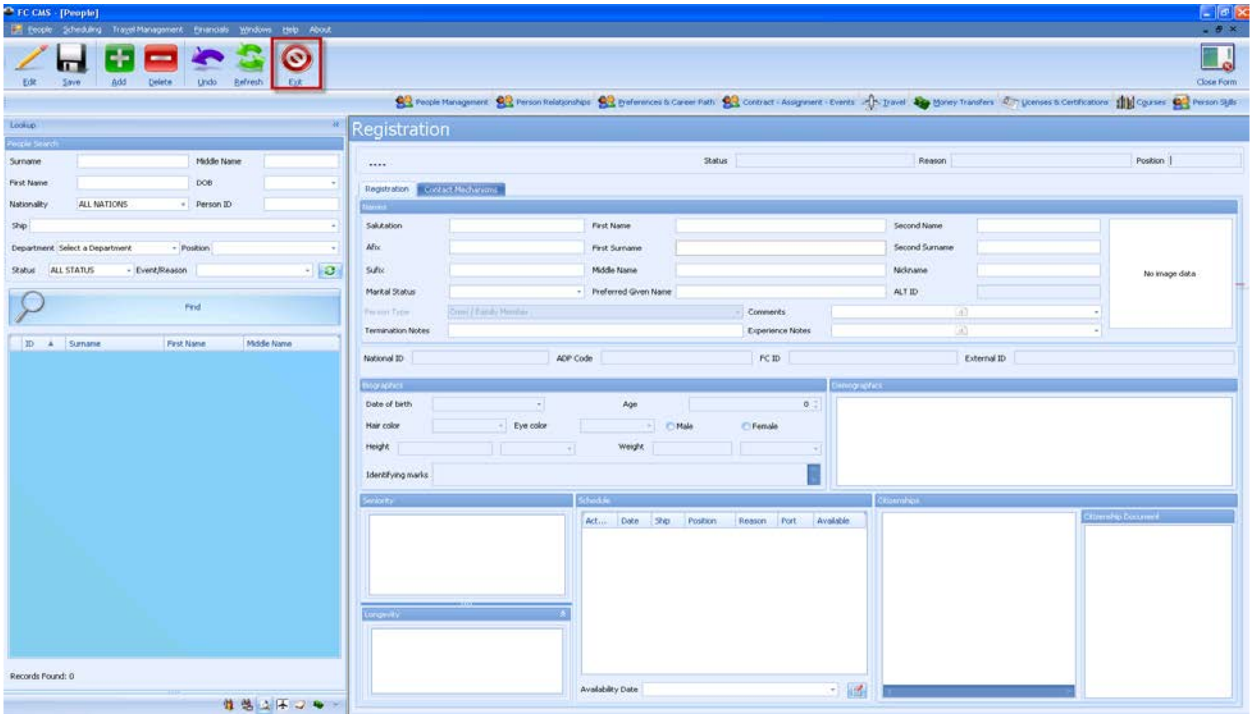
❖ Enter the initial (old) password followed by the new password of your choice, re-confirm the new password and click "OK" to save the modifications

❖ After a successful login, the default-screen "People Registration" will appear

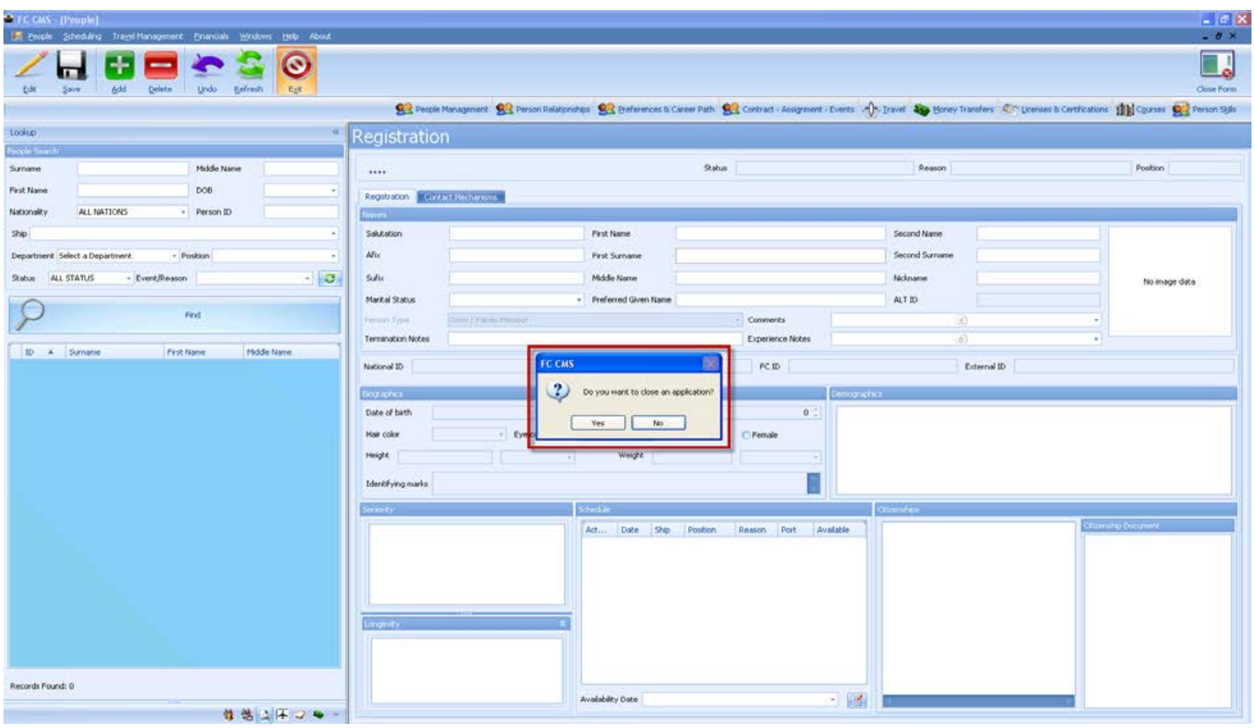


Logging out of CMS

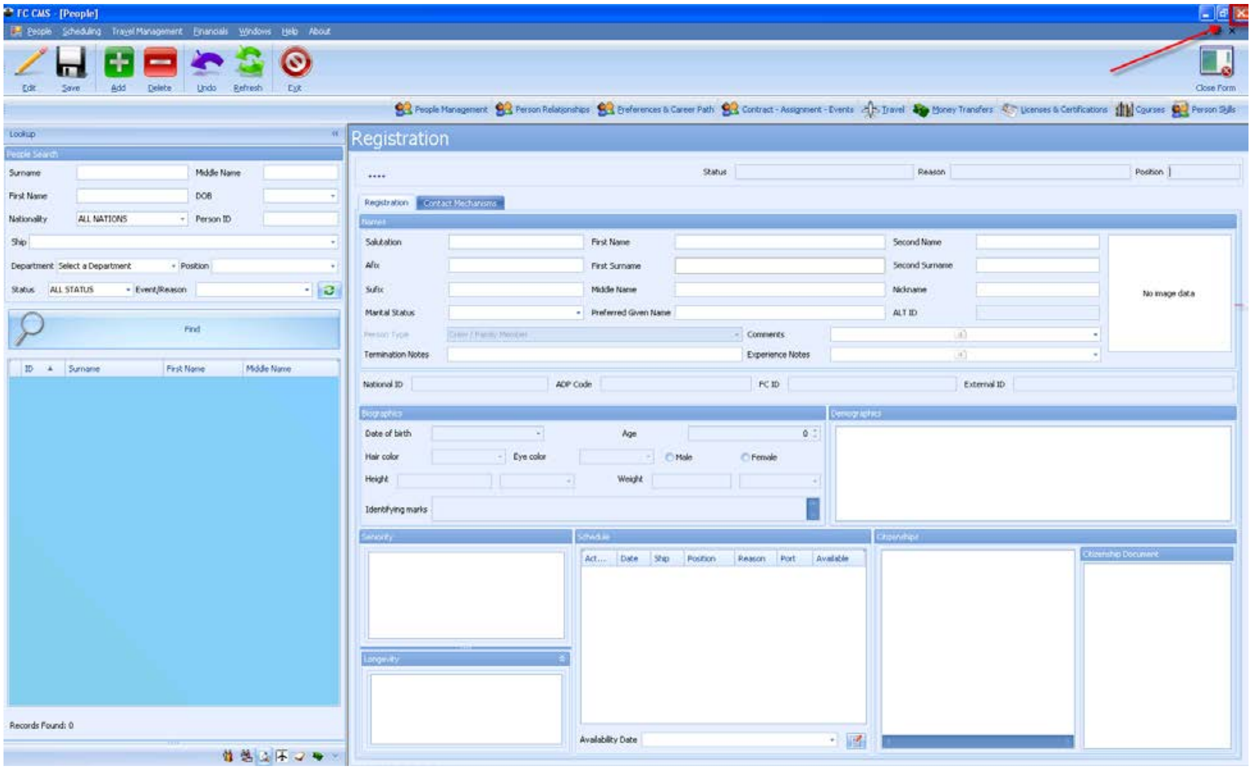
❖ In order to log out of CMS, simply click the "Exit" button in the main bar



❖ The system will prompt the following message "Do you want to close the application?" – select "Yes" to exit the system, click "No" to remain logged in



Clicking on the close-window symbol “X”, will close the application without any warnings!



User logins/Password/User-rights

❖ User logins have been set up for each person authorized to access CMS – if you have not yet been provided with your unique CMS-login, please see your Manager and/or IT

❖ The initial passwords which have been issued along with the user logins will need to be changed upon the first login into the system to a password of your choice

❖ Due to the sensitivity of the personal data CMS contains, user logins and passwords are under no circumstances to be shared with another individual – the company's password- and security-policy applies

❖ Passwords for CMS Logins follow the same principle as the one for your HAL Network access (specification of password-characteristics and renewal after a 3 months)

❖ Currently, passwords can only be reset by the IT Department – in case you are unable to log in with your current password or if you feel the need to change the password for security-reasons, please contact the Helpdesk

❖ User-rights have been determined by HR and IT and they will determine the access to screens and functionalities within the application. If you feel that your access-level is not set correctly and/or certain functionalities are not accessible, but are needed to perform your duties, please contact your Manager who will then start the formal approval-process for a changed user-access

Section II: CMS HR Management Overview

This section will cover:

- ☐ CMS HR Management Overview
- ☐ CMS HR Management Menu bar, tool bar and screens

- Home screen
- People-screens
- Scheduling-screens
- Travel Management-screens
- Financial-screen
- Windows
- Help
- About
- Tool bar

CMS HR Management Overview

❖ CMS is the **C**rew **M**anagement **S**ystem which will replace SGP, the system currently used to administer the seagoing personnel

❖ CMS consists of the following main modules, FCCMS Admin and FCCMS HR Management and has links to numerous other systems: MXP (ship's itinerary), LMS (training-records), RightRez (automatic travel-booking-tool connected to Sabre), Oracle Finance (Currency Exchange), SPMS*** (Fidelio Cruise shipboard-component) and FMS (Fleet Management System via SPMS)

***Until all ships have been upgraded to the latest Fidelio SPMS-version, CMS will also continue to have a link to SGP, so that all crew-information can be communicated to the ships that are still using CAP for the crew-administration, including payroll.

❖ CMS HR Management is divided into 4 sections: People – Scheduling – Travel Management – Financial

❖ **People:** Provides the crewmember's personal information as well as assignment-history, training- and certification-records, wage-information etc. and also contains the reports-functionality

❖ **Scheduling:** Provides various different tools to schedule crewmembers individually or in an automatic fashion (Tabular-, Gantt- and Auto-Scheduler), TOP-setup and Manning-port Management

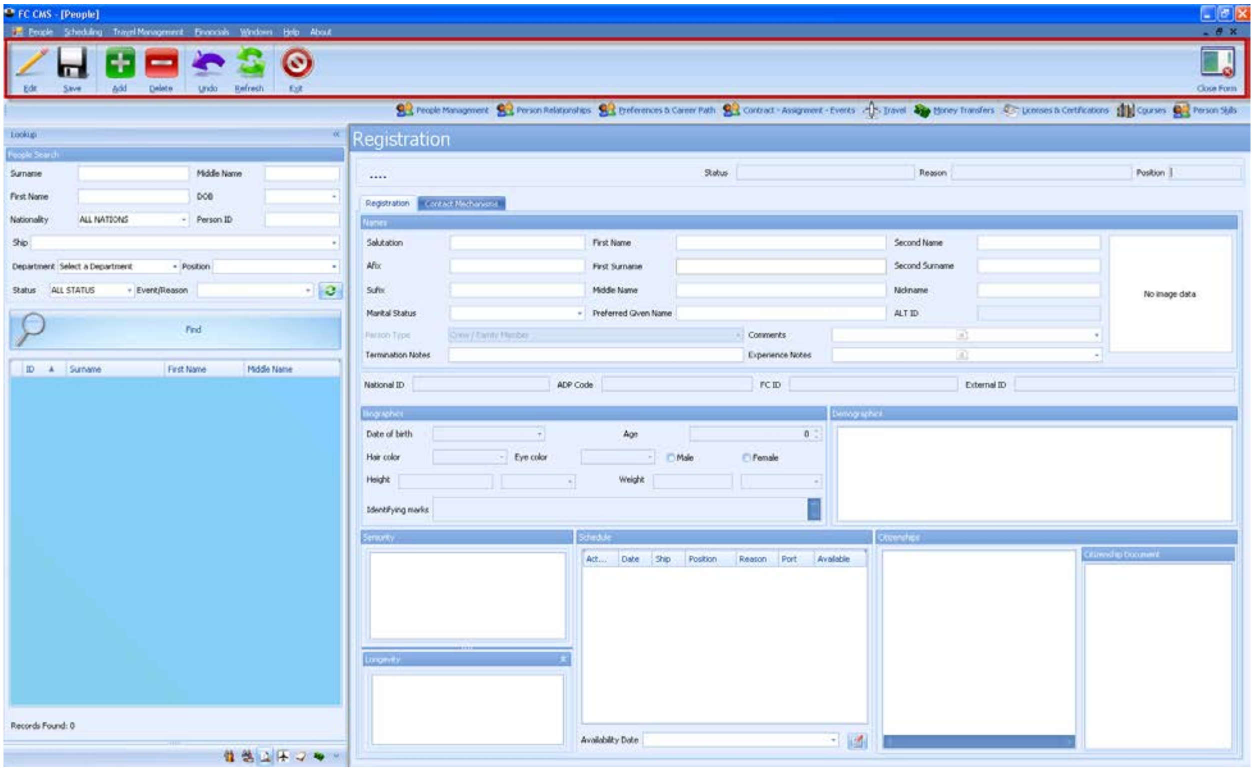
❖ **Travel Management:** Provides the crewmember's travel-profile (including travel-itineraries), travel-block setup, hotel- and transport-request functionalities

❖ **Financial:** Payroll-transactions to ship - **Pending fleet-wide SPMS-upgrade**

❖ CMS currently does currently not offer any keyboard shortcuts

CMS HR Management Tool Bar

The tool bar is located below the main menu bar and consists of the following buttons: Edit, Save, Add, Delete, Undo, Refresh, Exit and Close



❖ Edit: To modify a selected record/entry

❖ Save: To save a modification previously made

❖ Add: To add a new record/entry

❖ Delete: To delete a record/entry

❖ Undo: **Do not use (non-functioning) – will be removed in upcoming version**

❖ Refresh: To refresh a screen/form after modifications have been saved

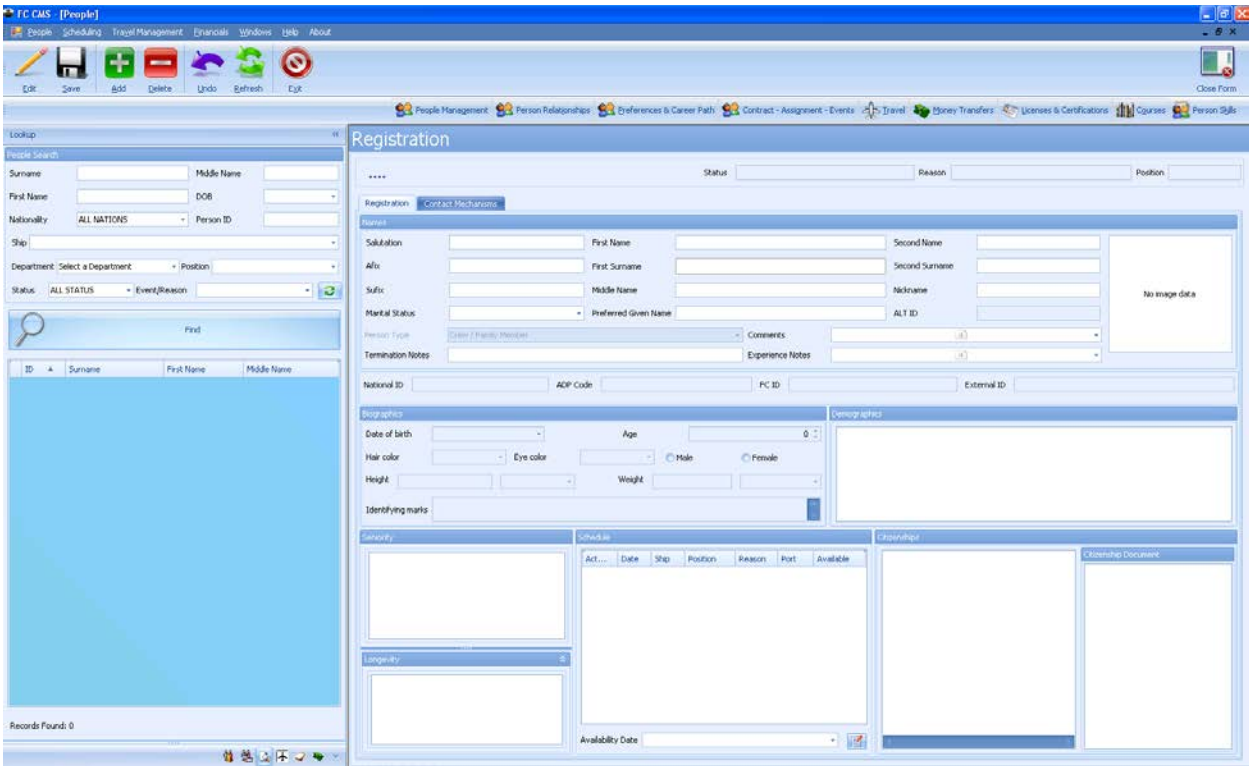
❖ Exit: To exit the system

❖ Close: To close

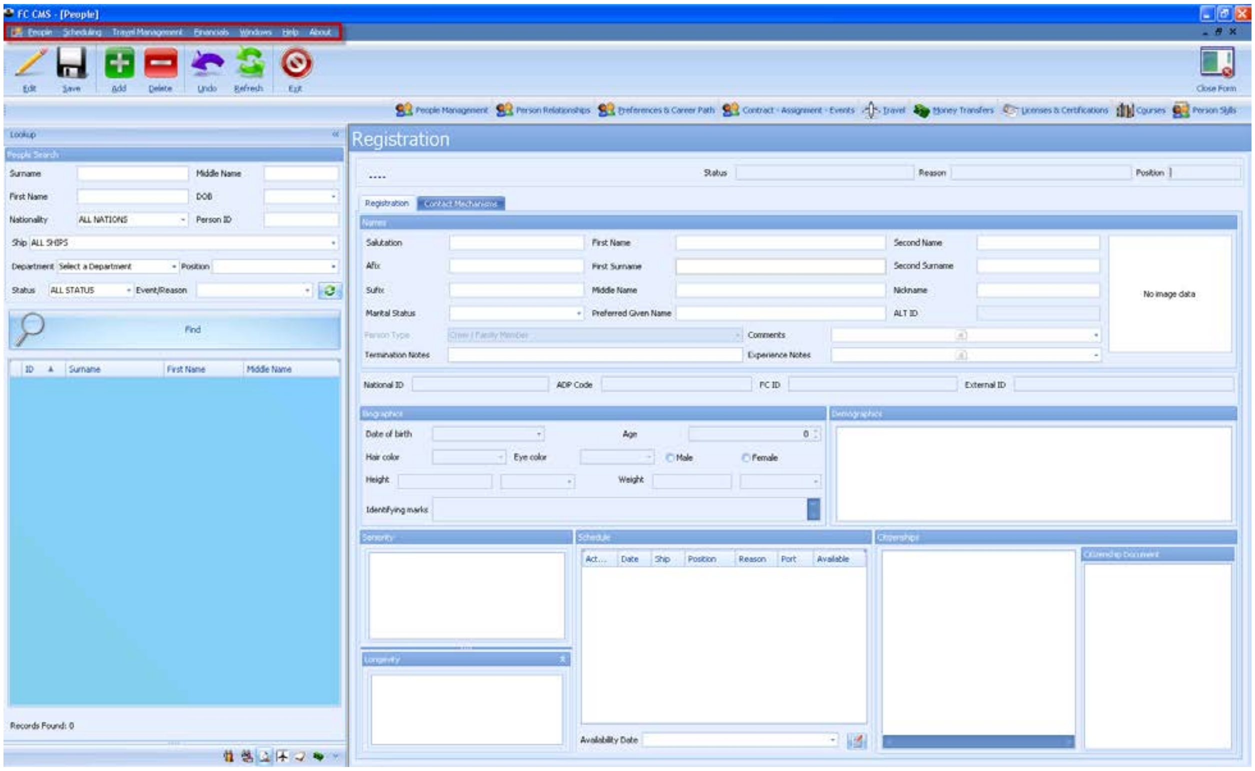
CMS HR Management Screens

❖ Home screen

The default home screen “People Registration” will display when logging into CMS HR Management



All other screens are selected from the options displayed in the menu bar



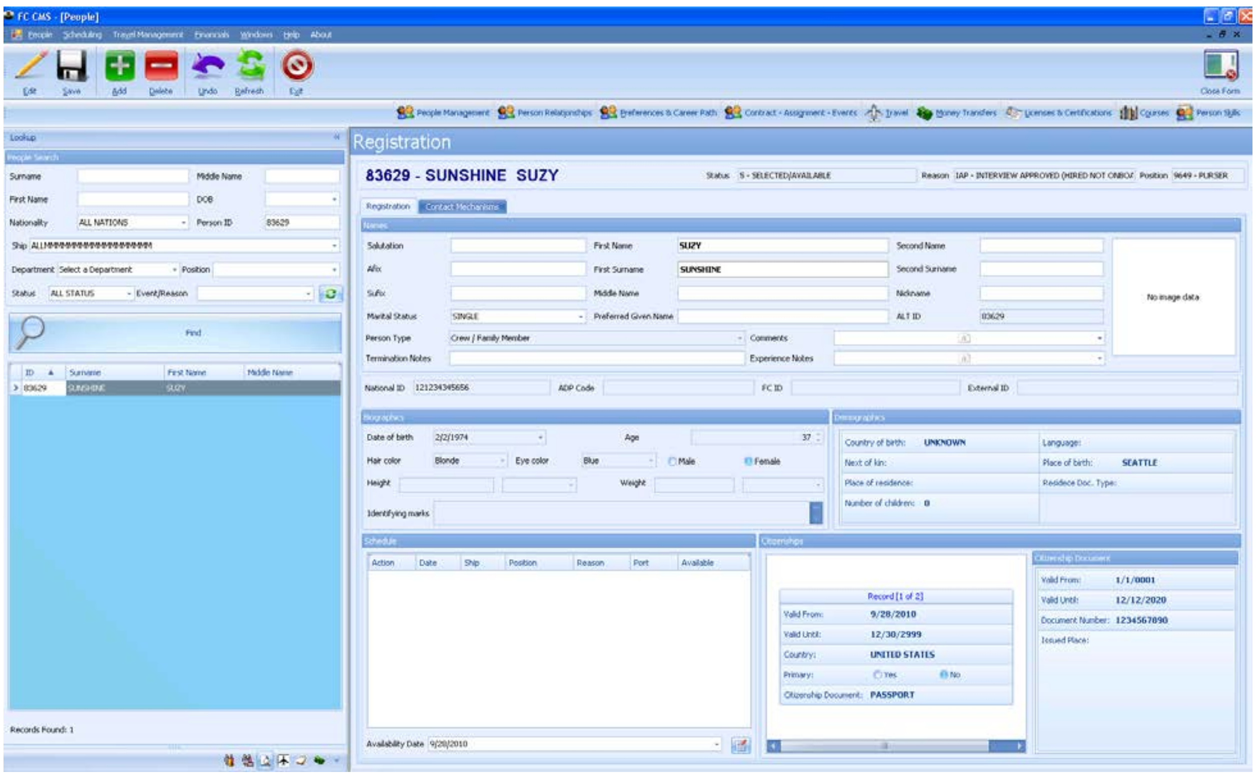
❖ **People-screens**

Selecting the option “People” in the menu bar allows you to choose from the following:

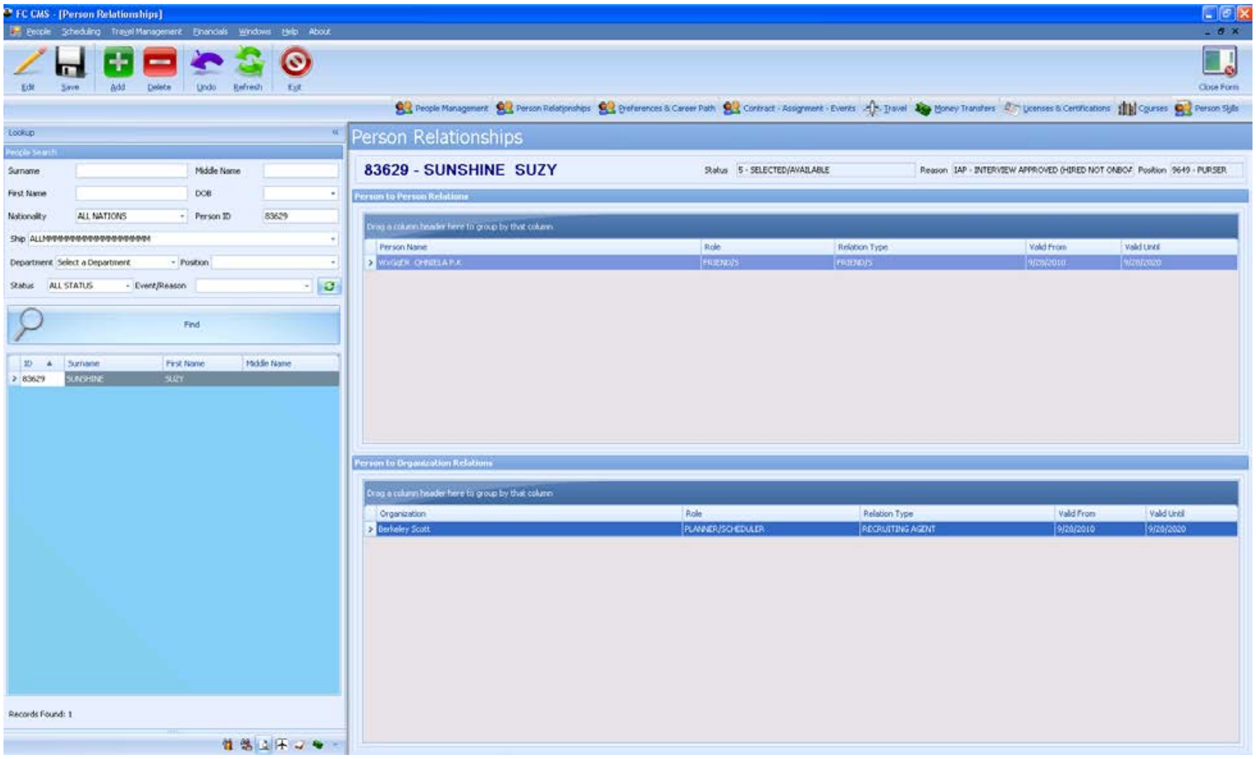
- People Management
- Person Relationships
- Preferences & Career Path
- Contract – Assignment – Events
- Person Travel Data
- Money Transfers
- Licenses & Certifications
- Courses and Training
- Person Skills

The same selection is also available via the buttons located above the main screen (upper bar)

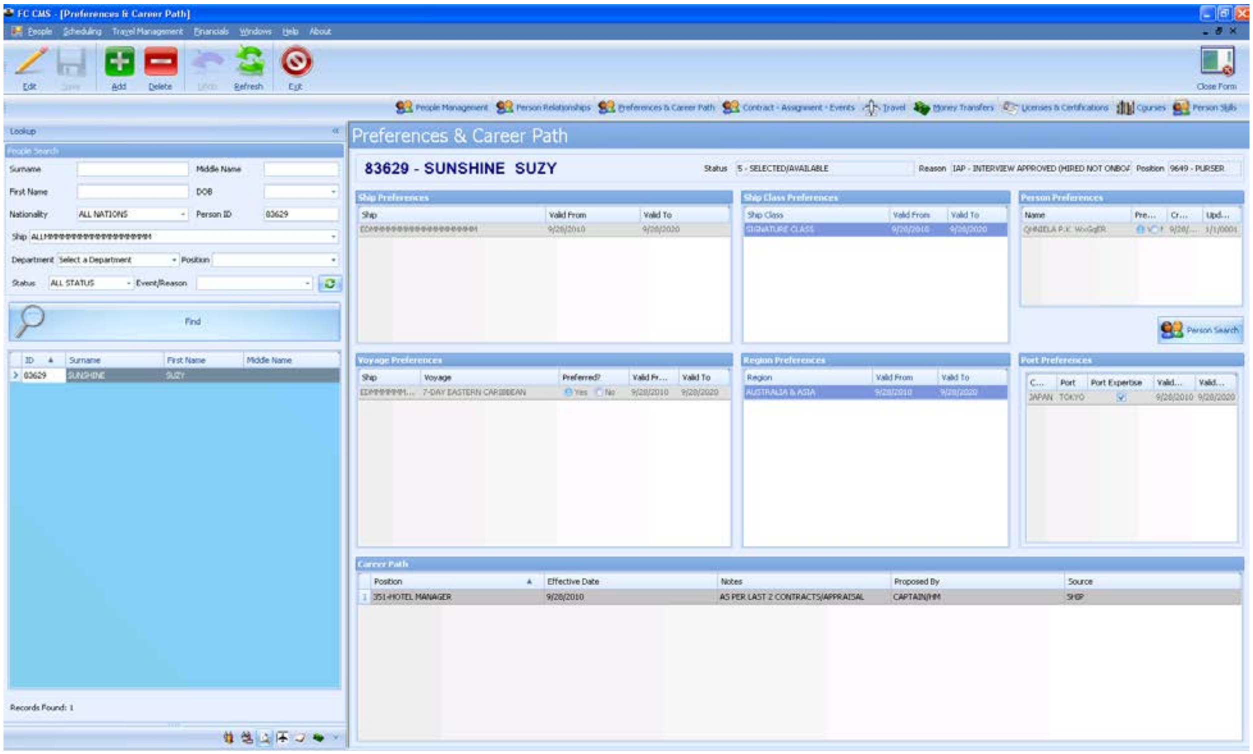
- **People Management** is the default screen (= People Registration, see Home screen): People search/lookup, reports-viewer, crewmember's biographic and demographic data



- **Person Relationships:** Person-to-person relations and person-to-organization relations

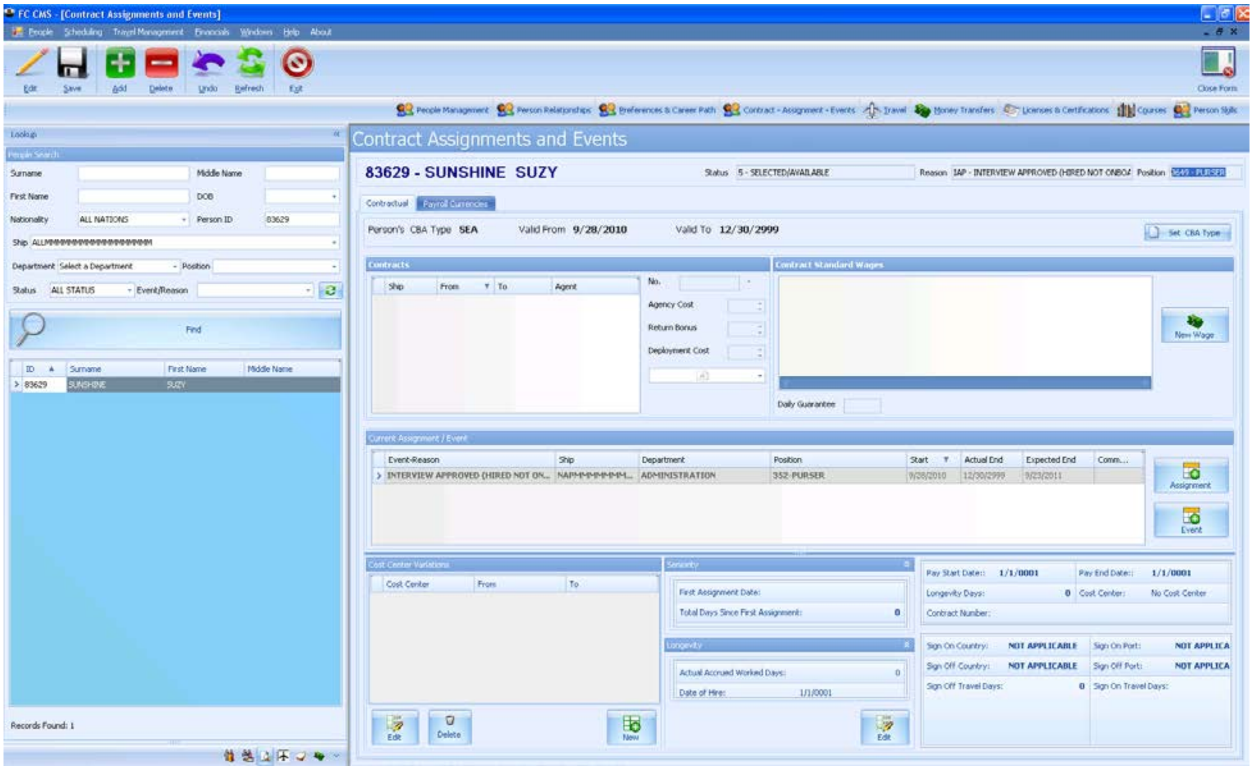


- **Preferences & Career Path:** Preferences pertaining to ship, ship class, person, voyage, region and port as well as career path (promotion-/demotion-list)

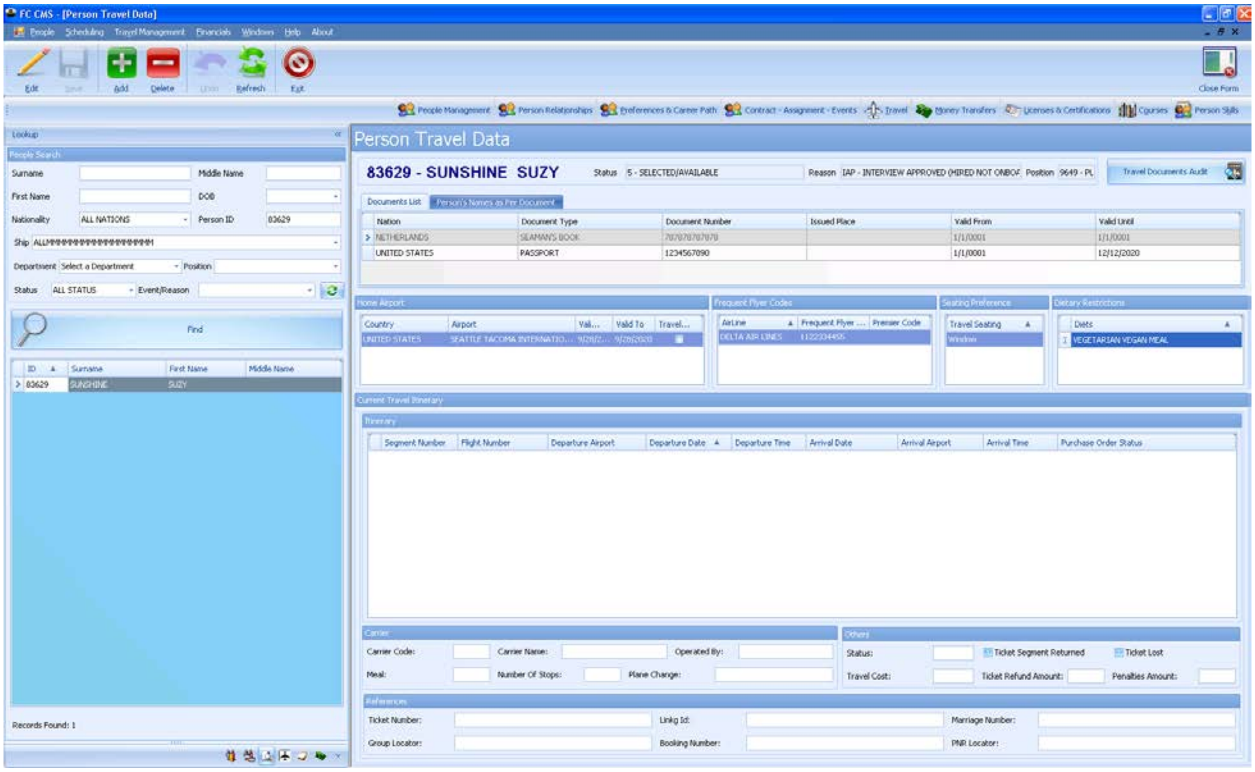


- **Contract – Assignment – Events:** Data/history regarding CBA-type, contract, wages, assignments/events, cost-centers, seniority, longevity and payroll-currency

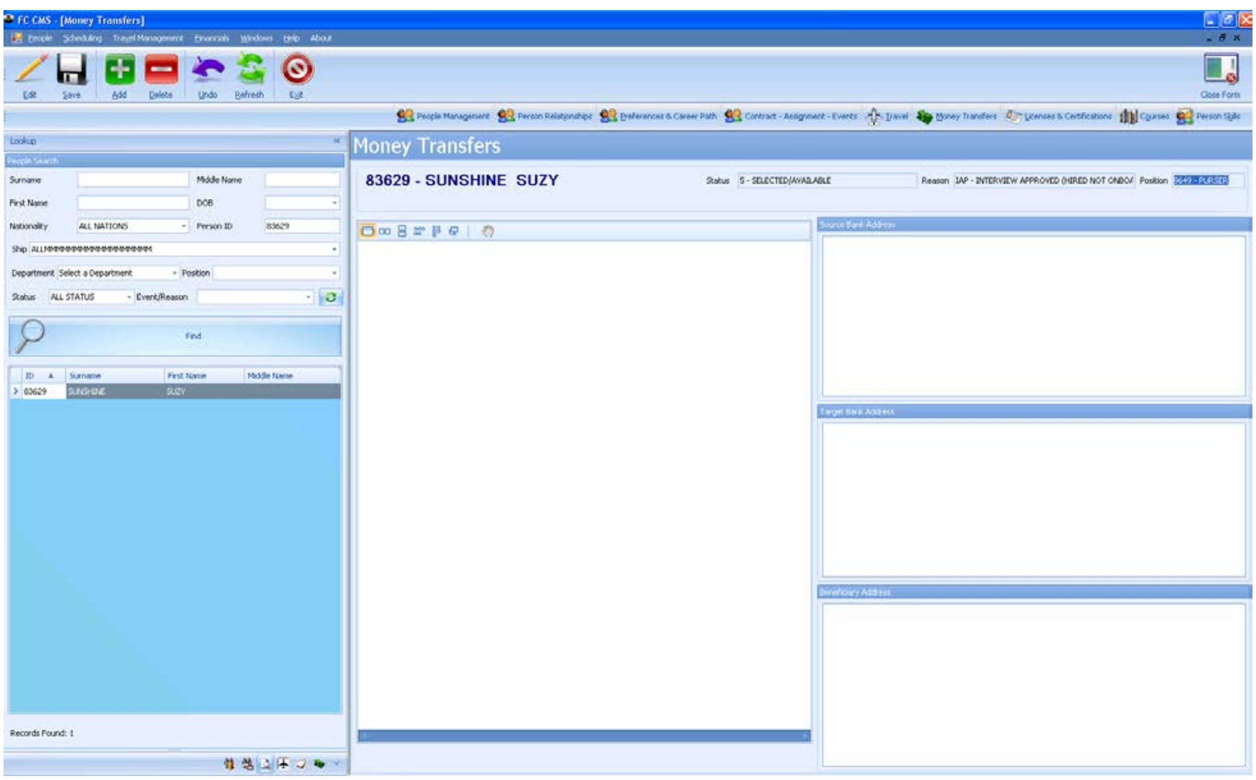
  ⚠ **This screen is also referred to as "Assignment-history" as it only shows any information pertaining to a current or past contract/assignment – future schedules will not appear here, but only in the scheduling-screens (Tabular- and/or Gantt-Scheduler)!**



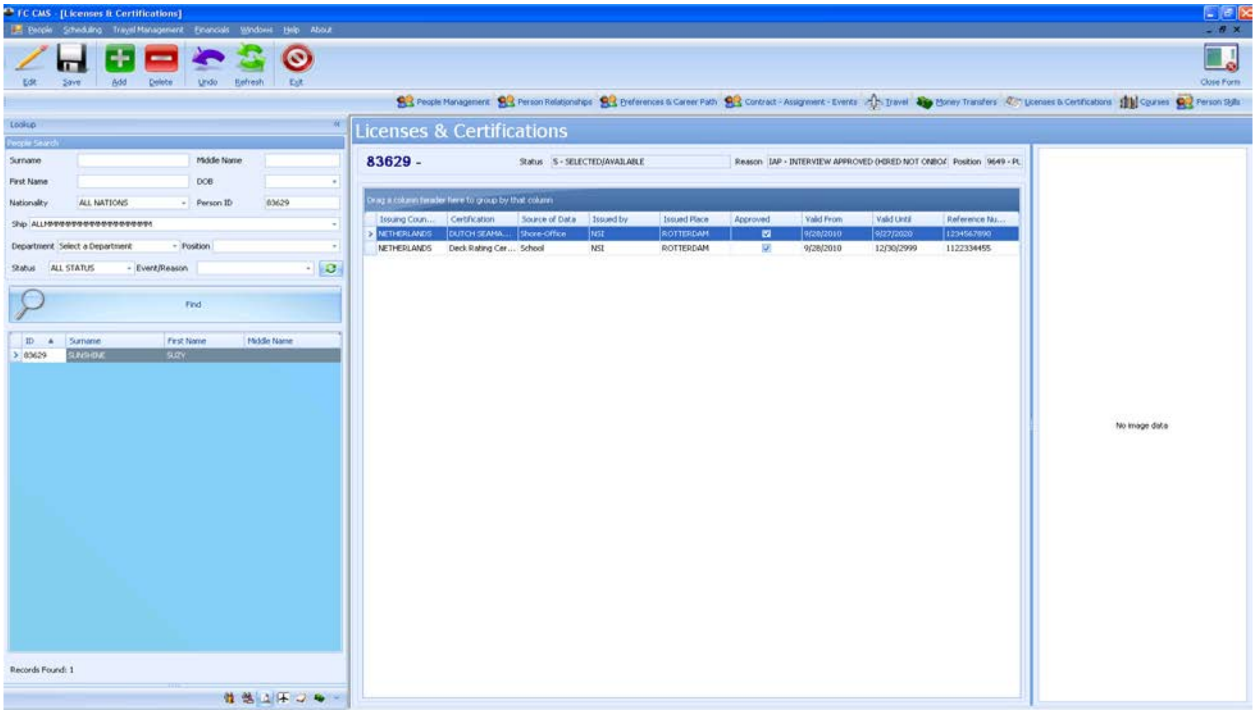
- **Person Travel Data:** Crewmember's travel-documents, home airport, frequent flyer-cards, seating preferences, dietary restrictions and current travel itinerary



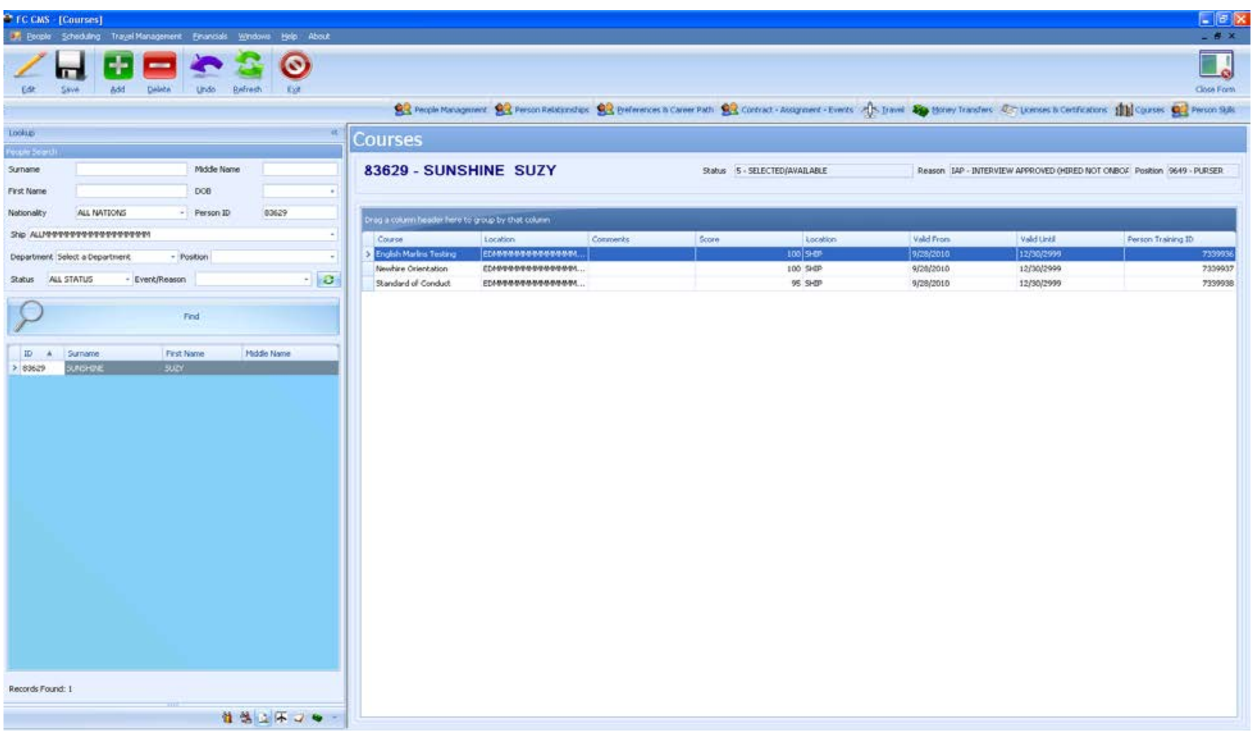
- **Money Transfers:** Currently not being used until further notice



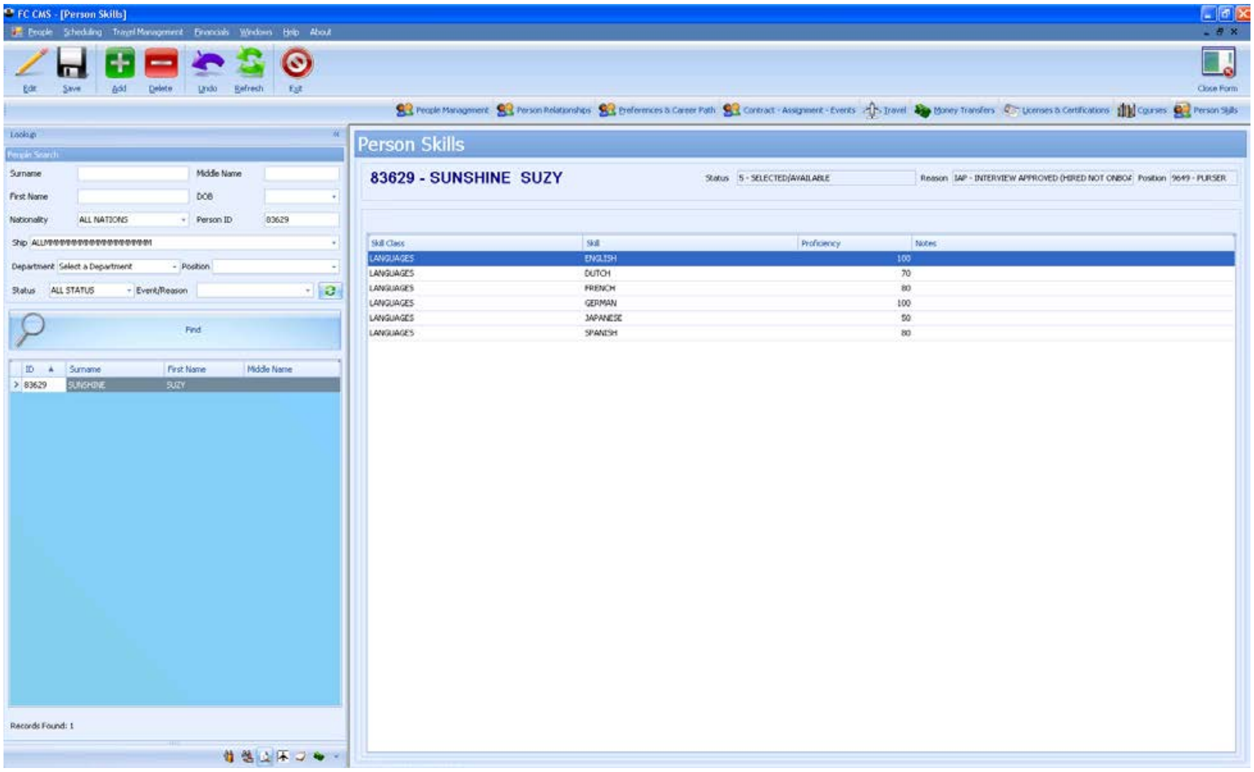
- **Licenses & Certifications:** Crewmember's current and past license- and certifications-records



- **Courses:** Crewmember's history of courses/trainings completed (current & past)



- **Skills:** Crewmember's skills – currently, only used for languages

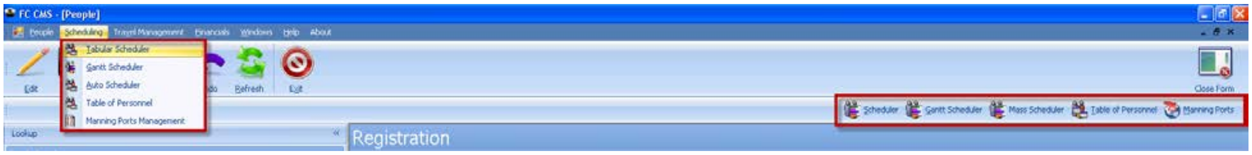


❖ Scheduling-screens

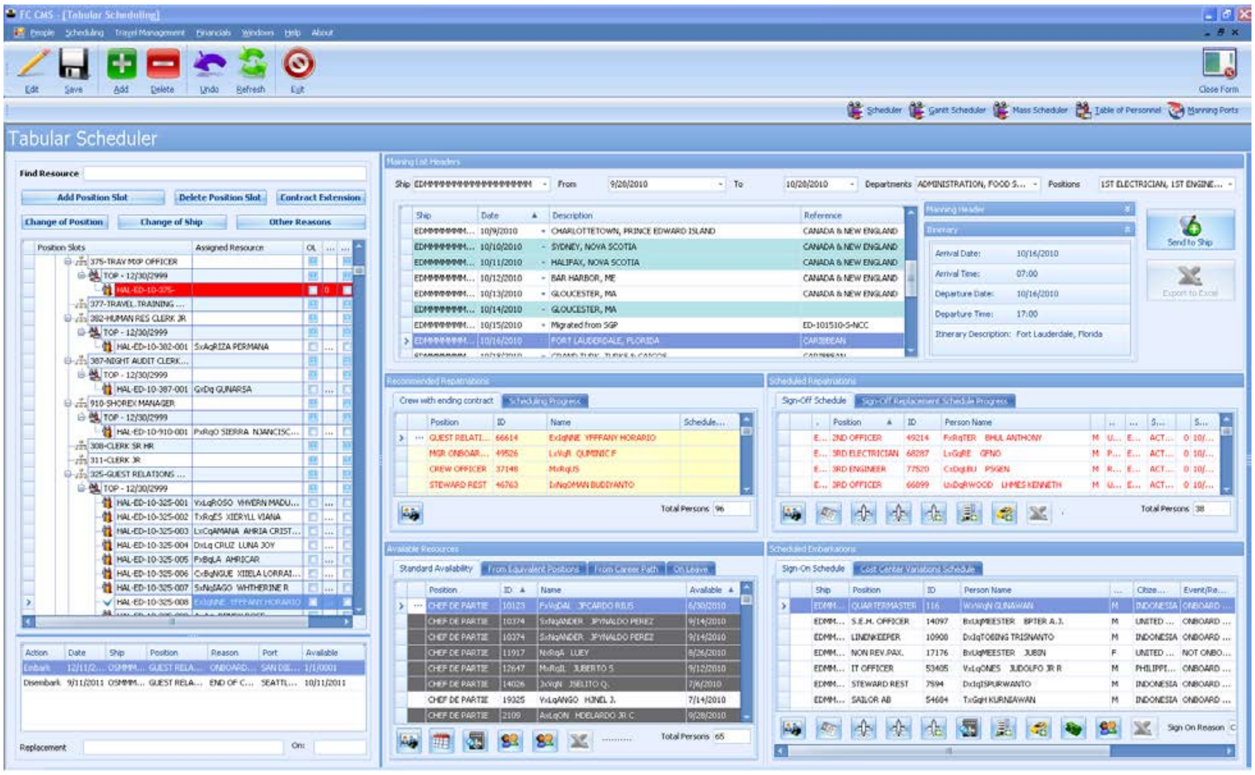
Selecting the option "Scheduling" in the menu bar allows you to choose from the following:

- Tabular Scheduler
- Gantt Scheduler
- Auto Scheduler
- Table of Personnel
- Manning Port Management

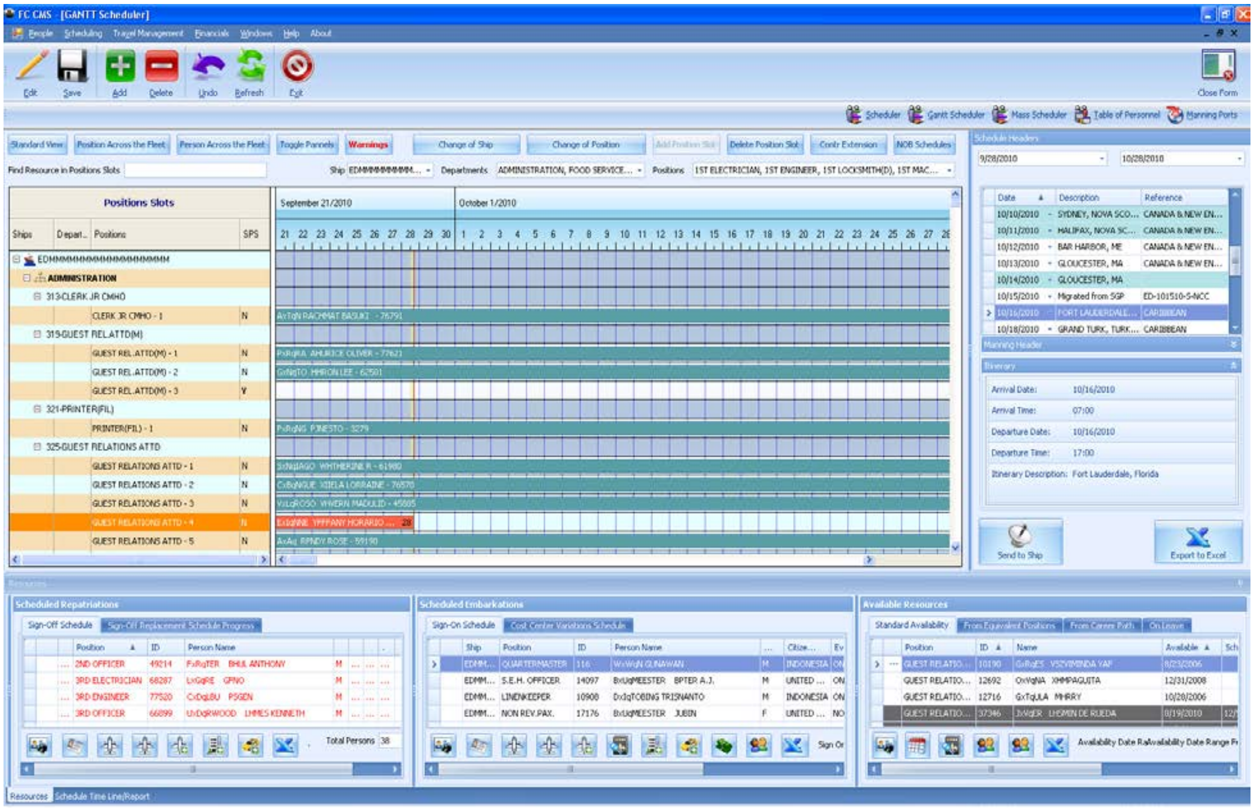
The same selection is also available via the buttons located above the main screen (upper bar)



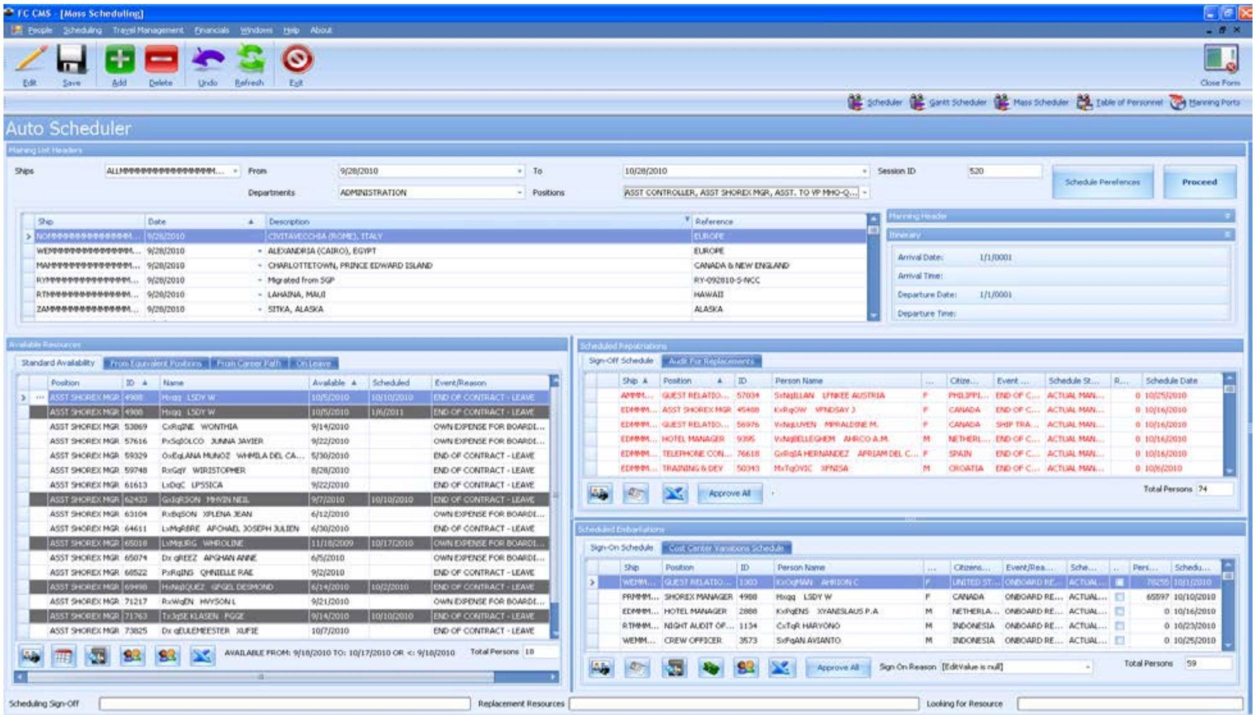
- **Tabular Scheduler:** Scheduling-tool where crew-status and –movements are displayed and managed in a tabular view/fashion



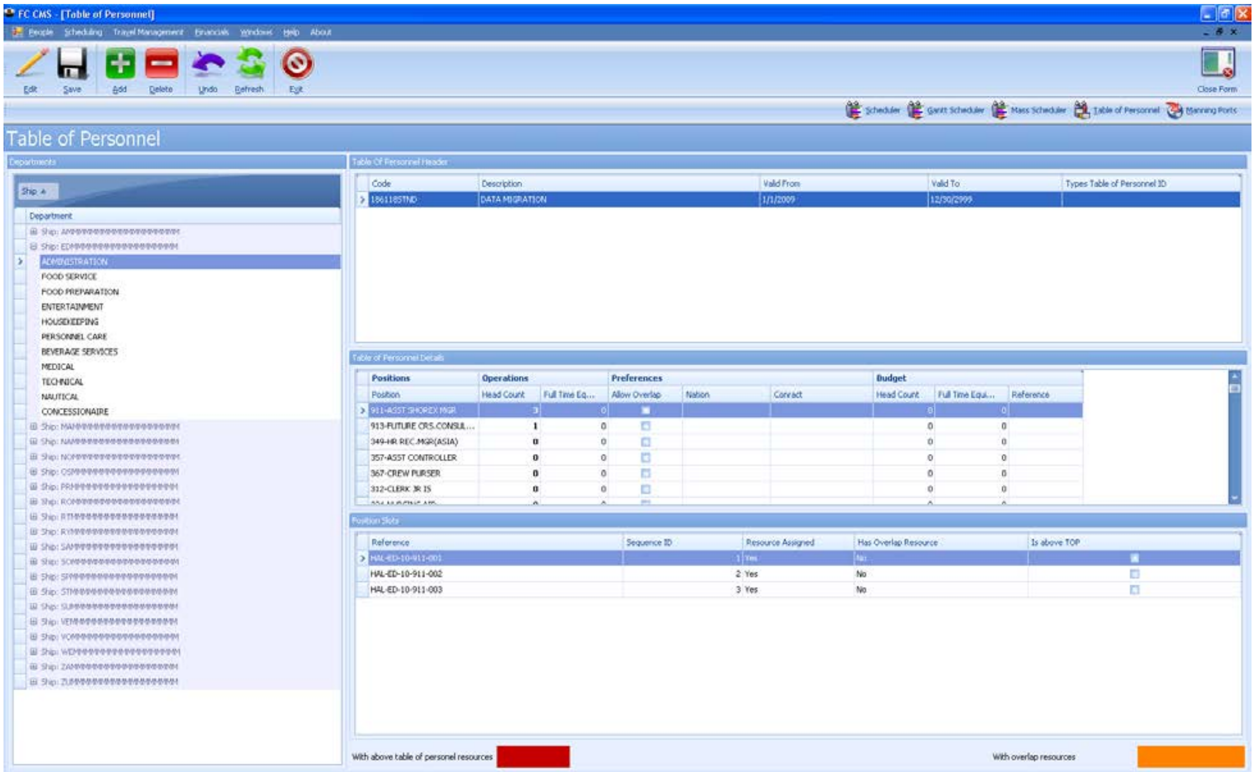
- **Gantt Scheduler:** Scheduling-tool where crew-status and –movements are displayed and managed in a Gantt-chart



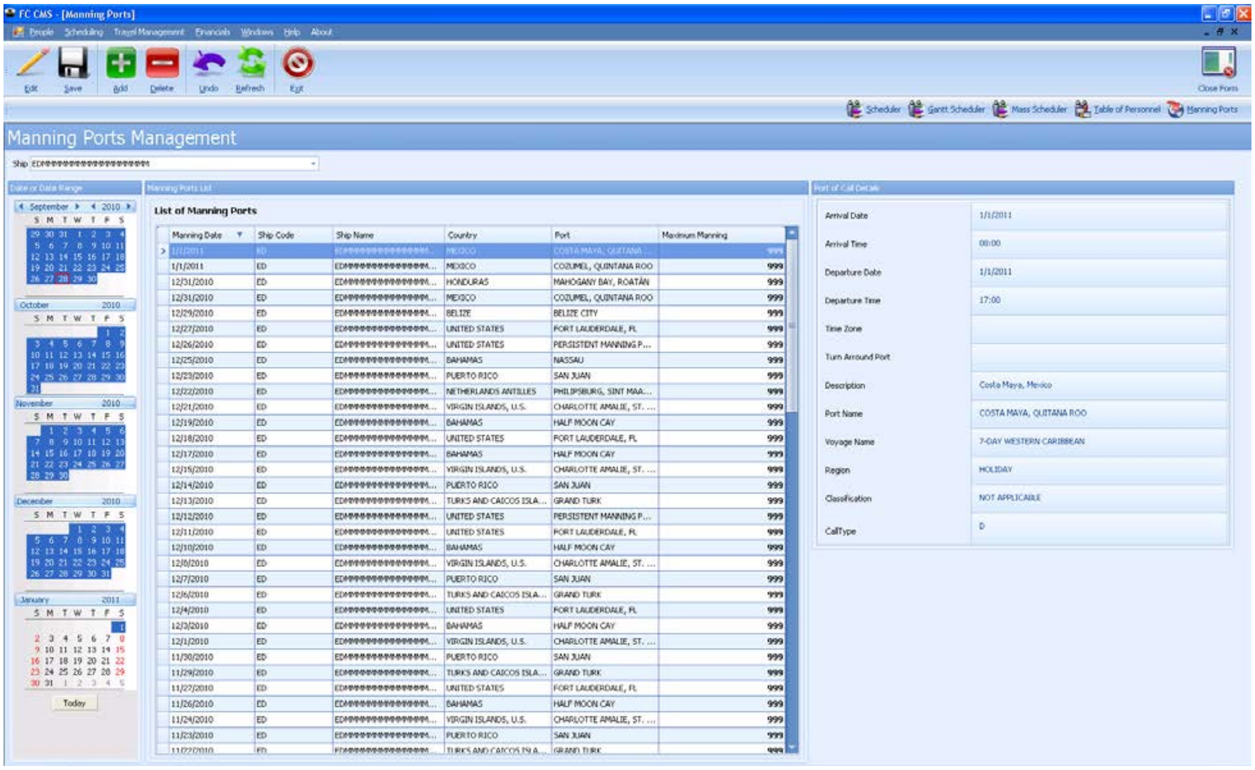
- **Auto Scheduler:** Scheduling-tool which provides automatic proposals for future schedules based on criteria selected



- **Table of Personnel:** Setup of Table of Personnel, set head-count determines number of position-slots created in the Tabular-/Gantt-Scheduler



- **Manning Port Management:** Set up of manning ports (important component for schedule-headers in Tabular-/Gantt-Scheduler)

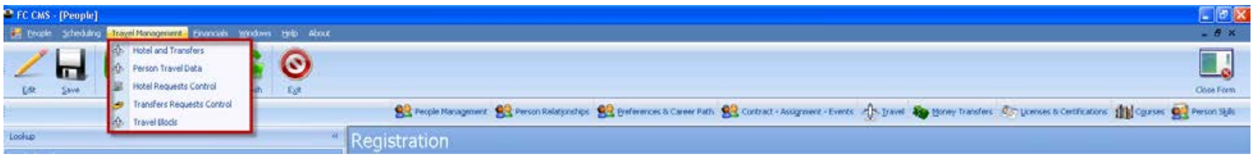


❖ Travel Management-screens

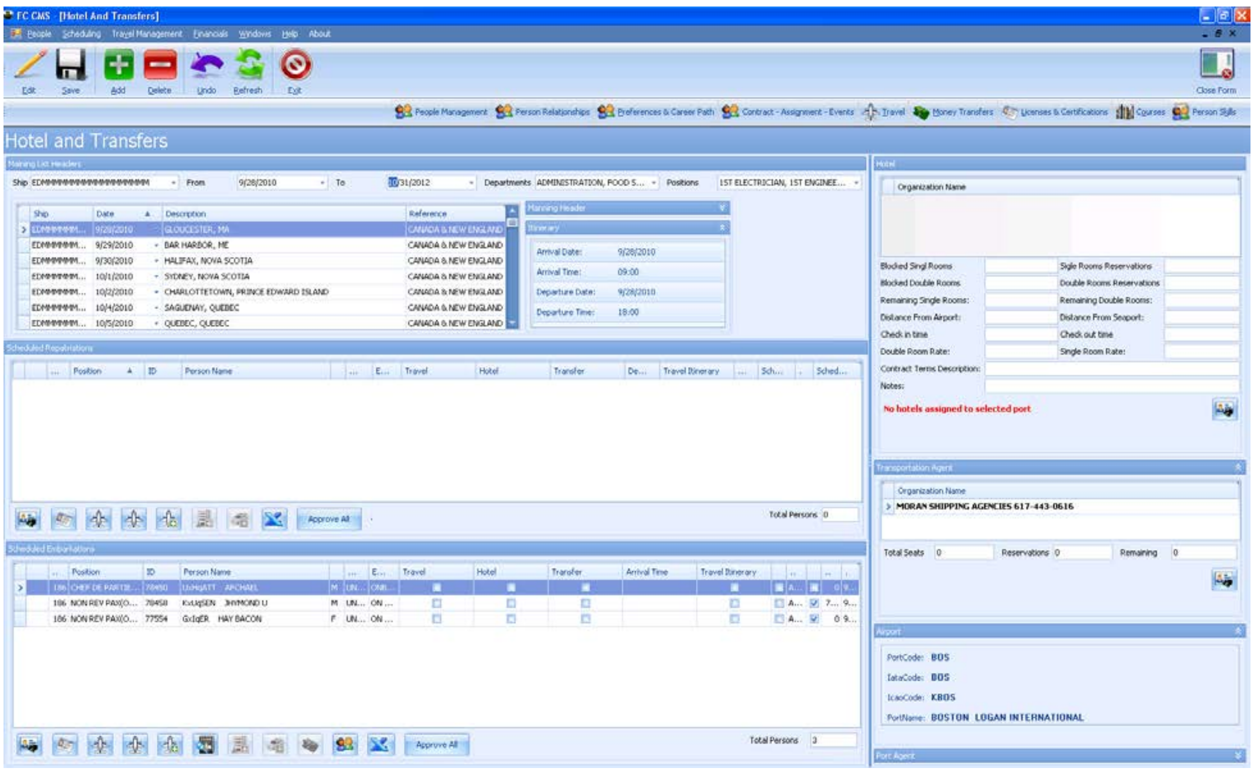
Selecting the option “Travel Management” in the menu bar allows you to choose from the following:

- Hotel and Transfers
- Person Travel Data
- Hotel Requests Control
- Transfer Requests Control
- Travel Blocks

Please note that the selection of “Travel Management” in the menu bar does not populate any corresponding buttons above the main screen – this is by design! The selection will only be available via the menu bar.



- **Hotel and Transfers (Air/Sea use only!):** Managing the crewmembers’ hotel- and transfer-requests



- **Person Travel Data:** Crewmember’s travel-documents, home airport, frequent flyer-cards, seating preferences, dietary restrictions and current travel itinerary

- **Hotel Requests Control:** **Currently not used**

- **Transfer Requests Control:** **Currently not used**

- **Travel Blocks:** Set up of travel block dates and –ports to be applied to travel-requests and schedule-headers (light blue color to indicate block dates in headers)

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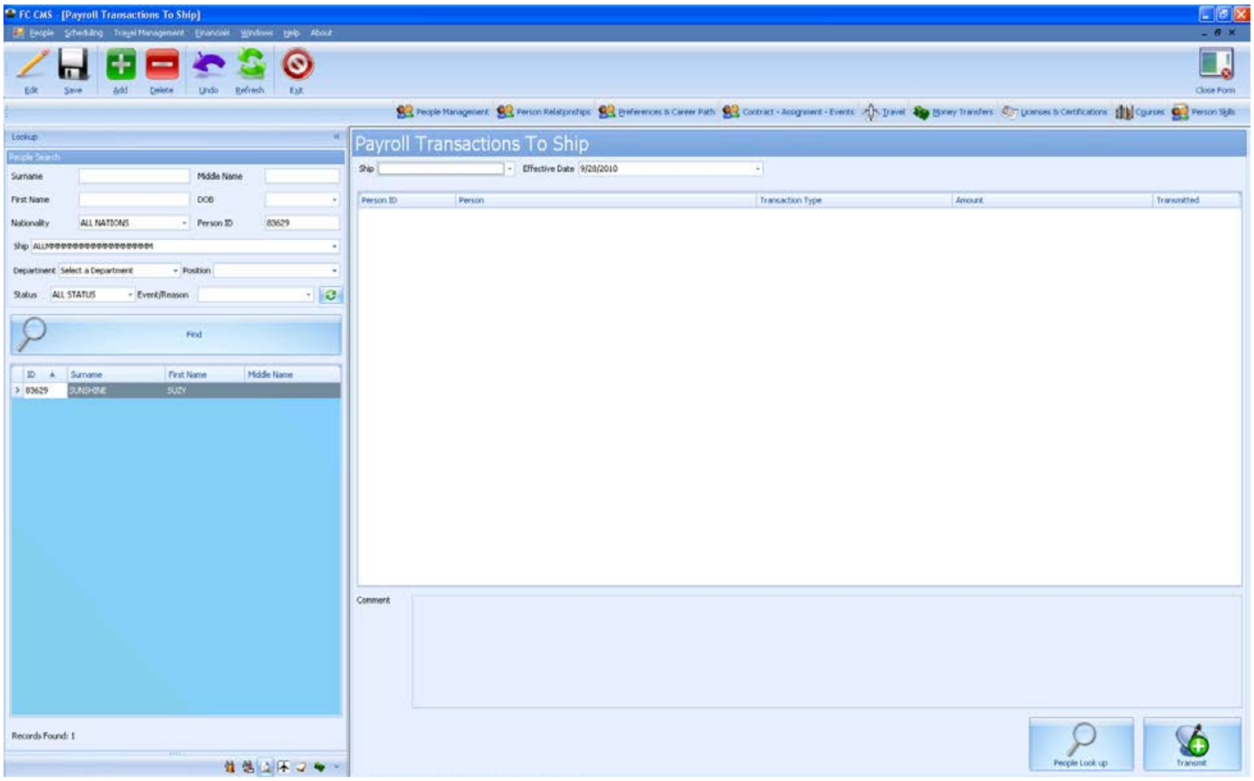
❖ Financial-screen

Selecting the option “Financials” in the menu bar allows you to choose the following:

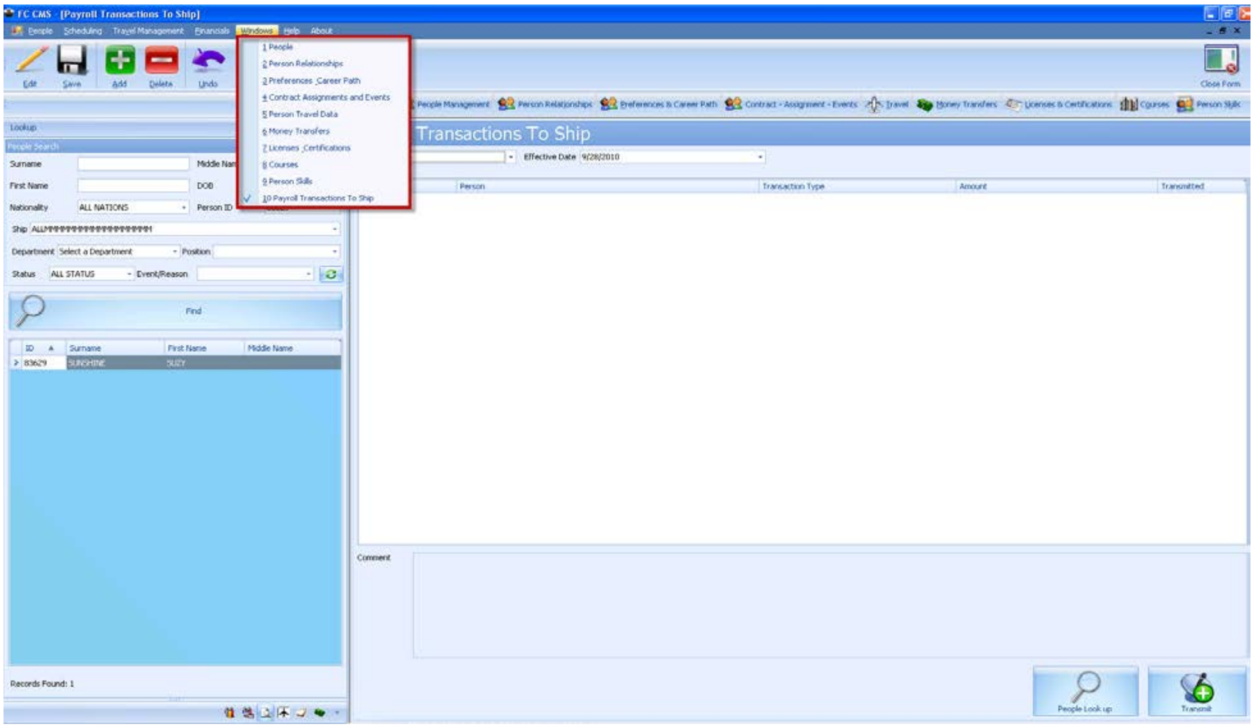
- Payroll-transactions to ship

Currently not used - pending fleet-wide SPMS-upgrade



❖ Windows

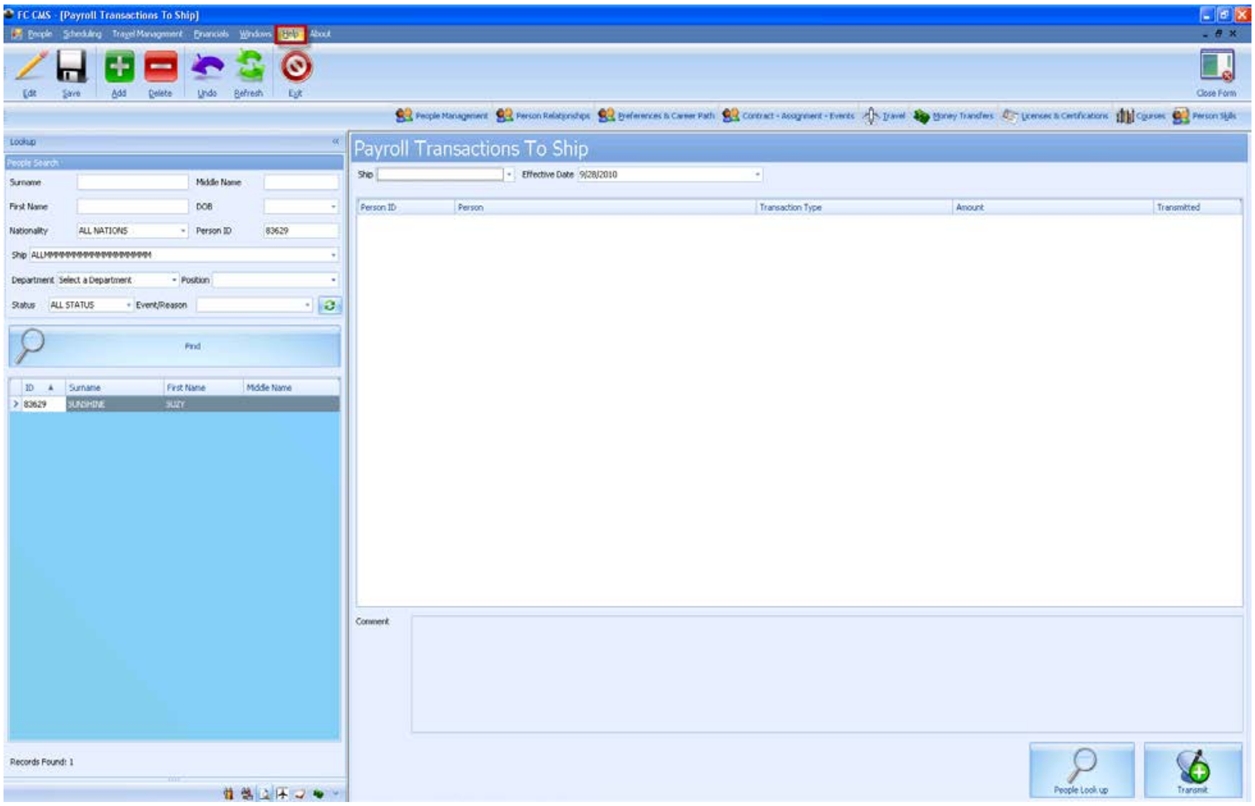
Selecting the option “Windows” in the menu bar allows you to easily switch between overlapping, previously opened screens



❖ Help

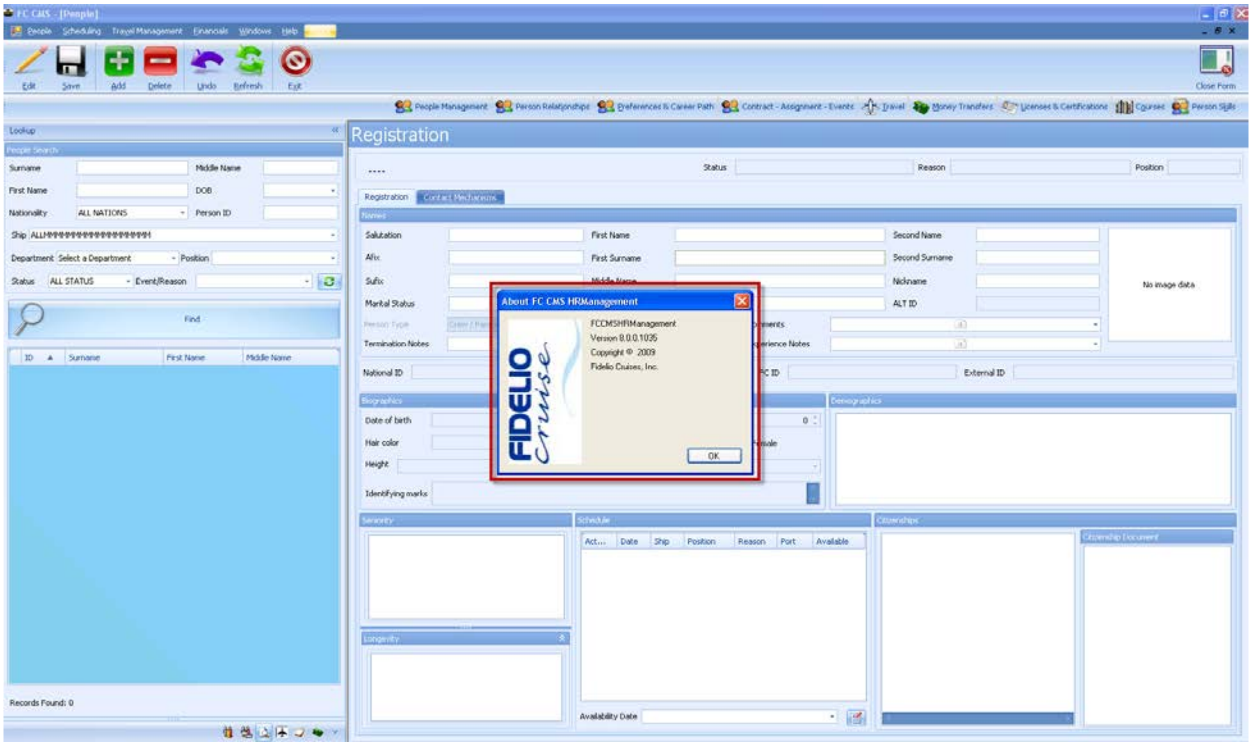
Selecting the option “Windows” in the menu bar allows you to access the Help-menu

Pending - currently not available



❖ About

Selecting the option “About” in the menu bar provides you product- & license-information about CMS HR Management



Section III: CMS HR Management Basics

This section will cover:

- ☐ Basic navigational and operational functions
- ☐ Generating Reports (Preview, export and print)

Basic navigational and operational functions

❖ Multiple sessions: The user is able to open multiple sessions of the application at the same time without any impact on the data. Tip: If the work-tasks require a constant switch between for instance the People Lookup and one of the scheduling-tools and the user has two monitors available at his/her workstation, open two session of the application and display the People Lookup-screen on one screen and the scheduling-tool on the second one.

❖ Mouse vs Keyboard: Navigating through the system is mainly done by using the mouse

❖ Shortcuts/hotkeys: CMS does currently not have any shortcuts or hotkeys inbuilt! All actions take place via clicking functionality-buttons, selecting menu-options, selecting option from a drop-down or entering values into specific fields.

❖ Split screens: Throughout the application, various screens contain multiple information-boxes, e.g. People/Preference & Career Path contains 7 different areas to capture data. In order to add/edit/delete data within these areas, the focus needs to be placed into the appropriate box. This is done by clicking into the empty area of the box (not the light-blue headers!). Once the focus is placed, the function-buttons in the tool bar can be used as needed.

❖ Collapse/hide a screen: Arrows (“>>” or “<<”) will indicate where screens can partially be collapsed/hidden to optimize the view.

❖ Toggle panels: The Gantt-Scheduler also offers the ability to hide

❖ Expanding/re-sizing boxes/views: Vertical dots in a vertical frame of a screen/box indicate that the box/view can be re-sized. Point the mouse to the frame/border for the expanding-arrows to appear, right-mouse click on the frame/border and re-size as needed

❖ Tabs: To select a tab, click with the mouse on the tab. Note: The active tab is colored in light-blue whereas the currently inactive tab is showing in dark blue!

❖ Drop-downs: Within the Scheduling-tools (Tabular-, Gantt- and Auto-Scheduler) the system also uses the “drag-and-drop”-functionality to execute certain scheduling-actions.

❖ Sorting of columns in screens: Most of the screens within CMS have a header inbuilt to label the various columns which are part of the screen. Each column can be sorted in ascending or descending order with one mouse-click. Left-mouse click into the header and the system will sort the data displayed in the columns in ascending order, click a second time into the same header and the data/columns will be sorted in descending order.

❖ Filtering of columns in screens: In the same fashion as the system allows the user to sort columns, it also gives the opportunity to filter the data displayed in the columns. Point the mouse to the upper right-hand corner of the header – the filter-symbol will appear. Click the filter to populate the column's content-listing. Choose the data the filter should be applied to by clicking on the record in the listing. This will instantly filter out all remaining data. To edit the filter, click "Edit Filter" at the right-hand lower corner to populate the "Filter Editor" – modify the filter as needed. In order to remove the previously set filter, click the "X" shown at the left-hand lower corner of the box.

❖ Save & Refresh: Several screens are not designed to refresh by themselves to automatically display the modifications made, hence it's strongly recommended to click the "Save"-button in the tool bar followed by the "Refresh"-button

Generating Reports (Preview, export and print)

❖ The shortcut to the Report Menu can be found in the Home-/Default-screen (People registration)

❖ Click the Notepad-icon located at the lower left-hand side of the People Search-form – this will populate the Report Viewer Menu

❖ Most users will only have access to this option of the Report Engine

❖ Select "Report Viewer" by clicking on the description – this will populate the report-groups and print-/preview-screen on the right

❖ Click on the "+"-sign next to the report-group to expand the group and view the report-selection within this group (alternatively, tick the "Expand All"-box to expand all report-groups at once – this will show a complete list of all reports available dependant on the user's access-rights)

❖ Select the report to be generated by clicking on the report-name – this will populate the selection-criteria for this specific report on the right-hand side under the "Print"-tab

❖ Select the criteria to be used for the report-generation from the shown drop-down menus

❖ ⚠ All drop-down selections must be completed for the report to generate properly!

❖ The user has three options for the print-generation: Preview, Print and Export

❖ Preview: Click the "Preview"-tab to trigger the creation of a preview of the report – while the system is processing the data for the preview, the preview will show the following message "Printing Report <report-name>"

❖ Once completed, the preview will appear on the screen

❖ Utilize the arrows at the top of the screen to navigate through reports which contain multiple pages

❖ Print: In order to print the report, click the "Print"-tab to return to the print-overview

❖ Select the printer to be used in the "Printer"-field

❖ Select the print-range in the "Print Range"-box – the default is set to "Print All"

❖ Enter the number of copies needed and change orientation- and collation-selections, if applicable

❖ Click “Print” to start the print-job

❖ Export: In order to export the report, click the “Print”-tab

❖ Click the “Export”-button at the bottom right-hand side of the screen

❖ While the system is preparing for the export, the system will show the following message “Exporting Report <report-name>”

❖ Shortly after, the system will prompt the “Export Report”-window for the user to choose the pathway for the report to be saved as well as to select the format for the export

❖ Type the report-name into the “File Name”-field and click on the drop-down “Save as type” to select the file-format to be used for the export

❖ Click “Save” to start the export

❖ While the system is processing the data for the export, the screen will show the following message “Exporting Report <report-name>”

❖ Once completed, the following message will appear “Export completed” – click “OK” to proceed

❖ The export is now completed and the file can be retrieved from the location previously selected

Section IV: People

This section will cover:

- ☐ People Management
- Searching for a crewmember
- Creating a new crewmember
- Updating a crewmember's person-record
- Lookup/Add/Edit/Delete a crewmember's contact-mechanism
- ☐ Person Relationships
- Add/Edit/Delete a person-relation
- Add/Edit/Delete an organization-relation
- ☐ Preferences & Career Path
- Add/Edit/Delete a ship preference
- Add/Edit/Delete a ship-class preference
- Add/Edit/Delete a person preference
- Add/Edit/Delete a voyage preference
- Add/Edit/Delete a region preference
- Add/Edit/Delete a port preference
- Add/Edit/Delete career-path information (promotion-list)
- ☐ Contract – Assignment – Events
- Add/Edit/Delete a crewmember's CBA-type
- Add/Edit wage-information for a current assignment
- Add/Edit a new assignment
- Add/Edit a new event
- Add/Edit/Delete a cost-center for a crewmember's assignment **(Restrictions)**

- Edit a crewmember's longevity

☐ Travel

- Add/Edit/Delete a travel-document
- Add/Edit/Delete a crewmember's home airport
- Add/Edit/Delete a Frequent Flyer Card
- Add/Edit/Delete a seating preference
- Add/Edit/Delete dietary restrictions
- View a crewmember's current travel itinerary

☐ Money Transfers

Currently not being used until further notice

☐ Licenses & Certifications

- Add/Edit/Delete a license or certificate

☐ Courses

- Add/Edit/Delete a course/training

☐ Person Skills

- Add/Edit/Delete a skill (language-skill in particular)

People Management

Search/Lookup of a crewmember

The search/lookup-functionality is part of the default-screen which displays upon logging into CMS and is part of the people management-form. The people search utilizes various filters to simplify and narrow the search for the user.

The filters can be used individually or in all possible combinations. In order to reset all previously selected filters or entered data for a new search with different criteria, click the reset-button . This will reset the People Search-form to its original, blank state.

- Search by Last Name

❖ Enter the crewmember's last name in the "Surname" text box

❖ The text box is not case sensitive, the name can be entered in lower, upper or mixed case

❖ Click "Find" or the press Enter-key to initiate the search

❖ The search-results will display in the lower part of the People Search-form

❖ In order to select a result shown in the list, click on the appropriate record – this will populate the crewmember's registration-form on the right

- Search by Last and First Name

❖ Enter the crewmember's last name in the "Surname" text box and the first name in the "First Name" text box

❖ The text box is not case sensitive, the name can be entered in lower, upper or mixed case

❖ Due to most of the crew-records being migrated from SGP in which the "First name"-field also contains the crewmember's middle name(s), any first name entry in CMS should end with the "%"-sign to ensure all possible combinations are provided as a search-result. Example: When searching for crewmembers with the first name "Tom", the entry in the "First Name" text box should be entered as follows: Tom%

❖ Click “Find” or the press Enter-key to initiate the search

❖ The search-results will display in the lower part of the People Search-form

❖ In order to select a result shown in the list, click on the appropriate record – this will populate the crewmember’s registration-form on the right

- Search by partial Last Name

❖ Enter the crewmember’s partial last name followed by the “%”-sign in the “Surname” text box

❖ The text box is not case sensitive, the name can be entered in lower, upper or mixed case

❖ Click “Find” or the press Enter-key to initiate the search

❖ The search-results will display in the lower part of the People Search-form

❖ In order to select a result shown in the list, click on the appropriate record – this will populate the crewmember’s registration-form on the right

- Search by Middle Name

❖ Due to most of the crew-records being migrated from SGP in which the crewmember’s middle name(s) is part of the “First name”-field, any search by middle name needs to be done in the “First Name” text box and not in the “Middle Name” text box

(Check with HR whether Middle Name will be used for newly created records.)

❖ Enter the crewmember’s middle name in the following format in the “First Name” text box: “%”-sign followed by the crewmember’s middle name and a second “%”-sign, e.g. %John%

❖ The text box is not case sensitive, the name can be entered in lower, upper or mixed case

❖ Click “Find” or the press Enter-key to initiate the search

❖ The search-results will display in the lower part of the People Search-form

❖ In order to select a result shown in the list, click on the appropriate record – this will populate the crewmember's registration-form on the right

- Search by Date of Birth

❖ Enter the date of birth into the "DOB" field

❖ Click "Find" or the press Enter-key to initiate the search

❖ The search-results will display in the lower part of the People Search-form

❖ In order to select a result shown in the list, click on the appropriate record – this will populate the crewmember's registration-form on the right

- Search by Crew ID

❖ Enter the crewmember's unique crew ID in the "Person ID" text box

❖ Click "Find" or the press Enter-key to initiate the search

❖ The search-results will display in the lower part of the People Search-form

❖ The registration-form on the right will automatically refresh with the crewmember's information – there is no need to select it since any crew ID will only have one search-result due to its uniqueness

❖ ⚠ As previously mentioned, the various filters can be used together in any possible combination, however, please note that whenever the crew ID is part of the multiple search criteria, the crew ID will take presidency over all others!

- Search by Ship

❖ Select the ship from the drop-menu of "Ship"

❖ Click "Find" or the press Enter-key to initiate the search

❖ The search-results will display in the lower part of the People Search-form

❖ In order to select a result shown in the list, click on the appropriate record – this will populate the crewmember's registration-form on the right

- Search by Department

❖ Select the department from the drop-menu of "Department"

❖ Click "Find" or the press Enter-key to initiate the search

❖ The search-results will display in the lower part of the People Search-form

❖ In order to select a result shown in the list, click on the appropriate record – this will populate the crewmember's registration-form on the right

- Search by Position

❖ The search by position can only be performed with the filter "department" prior being selected

❖ Select the department from the drop-menu of "Department"

❖ Select the position from the drop-menu of "Position"

❖ Click "Find" or the press Enter-key to initiate the search

❖ The search-results will display in the lower part of the People Search-form

❖ In order to select a result shown in the list, click on the appropriate record – this will populate the crewmember's registration-form on the right

- Search by Status

❖ Select the status from the drop-menu of "Status"

❖ Click "Find" or the press Enter-key to initiate the search

❖ The search-results will display in the lower part of the People Search-form

❖ In order to select a result shown in the list, click on the appropriate record – this will populate the crewmember's registration-form on the right

- Search by Event/Reason

❖ ⚠ The search by event/reason can only be performed with the filter “status” prior being selected

❖ Select the status from the drop-menu of “Status”

❖ Select the event/reason from the drop-menu of “Event/Reason”

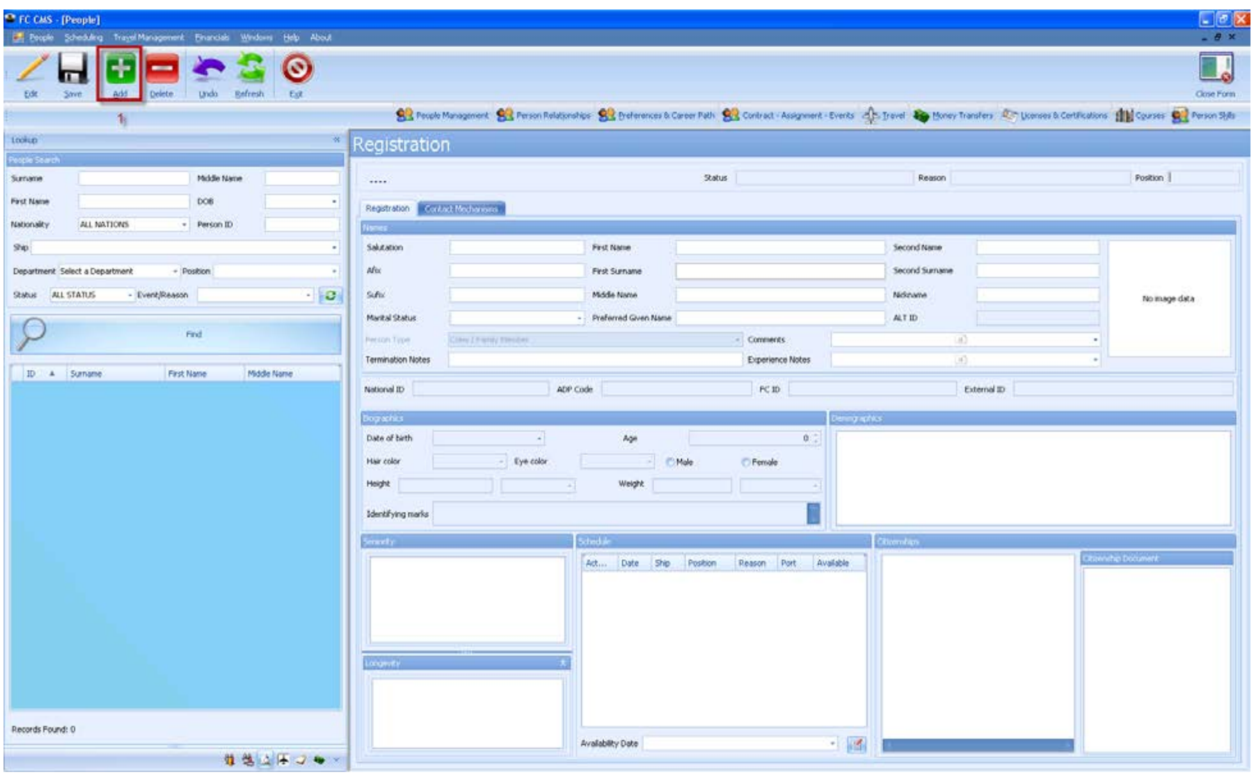
❖ Click “Find” or press the Enter-key to initiate the search

❖ The search-results will display in the lower part of the People Search-form

❖ In order to select a result shown in the list, click on the appropriate record – this will populate the crewmember’s registration-form on the right

Creating a new crewmember

❖ Go to the “People Registration”-screen (default-screen when logging into CMS) by selecting People from the menu bar followed by People Management



❖ Click the “Add”-button in the toolbar

❖ The Person Data Editor-form will populate

❖ Click the "Create New Crew Member"-button

❖ Not clicking this button, will result in the "Save"-button not becoming available even if all mandatory fields have been entered.

❖ Enter the crewmember's biographic- and demographic data (Last name, first name, date of birth, gender, marital status etc.) in the appropriate fields

❖ Mandatory fields can be identified by the field-description being displayed in bold letters. In case not all mandatory fields have been completed, the system will prompt a message "Missing required values for marital status, date of birth, etc." when trying to save the entries.

❖ Optional: Photo-upload - to add a crewmember's photo to his/her record, double-click in the image-box. This will open the window to locate the image-file. Select the image-file and click "Open". The photo will now display in the registration-form

❖ Click "Save" to save the newly created crew-record

❖ Click "Close" to close the form and to complete the crewmember's registration-process

Updating a crewmember's person-record

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting People from the menu bar followed by People Management

❖ Find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID

❖ Click "Find" to populate the search-results

❖ Select the record to be modified by clicking on the crew-record in the result-list

❖ The system will populate the crewmember's data in the registration-form on the right (default is the "Registration"-tab")

❖ Click "Edit" to open the "Person Data Editor"-form

❖ Modify the crewmember's data as needed, e.g. updating passport-information or similar

❖ Click "Save" to save the modifications made

❖ Click “Close” to close the registration-form

❖ Click the “Save”-button in the tool bar to save the changes made

Lookup/Add/Edit/Delete a crewmember’s contact-mechanism

❖ Go to the “People Registration”-screen (default-screen when logging into CMS) by selecting People from the menu bar followed by People Management

❖ Find the appropriate crewmember’s record by using the People Search (Lookup), e.g. search by crew ID

❖ Click “Find” to populate the search-results

❖ Select the record to be viewed/modified by clicking on the crew-record in the result-list

❖ The system will populate the crewmember’s data in the registration-form on the right (default is the “Registration”-tab”)

❖ Click on the “Contact Mechanism”-tab in the registration-form to display the crewmember’s various contact-details (Home-address, email-address, home phone, cell phone etc.)

❖ To view an existing contact-mechanism: Select the record to be viewed by clicking on it, the data will appear in the appropriate “Postal Address”- or “Telecommunication”-boxes on the right

❖ To create a new contact-mechanism: Click on the “Notepad”-button and select “New”

❖ A blank form of the Person Contact Mechanism Editor will populate

❖ Select the contact-type from drop-down menu of the “Type”-field

❖ The “Category”-field will populate automatically based on the contact-type selected

❖ Enter the validity for the contact-mechanism in the “Valid From”- and “Valid Until”-field

❖ Enter the contact-mechanism data accordingly (“Postal Address”- or “Telecommunication”- text box)

❖ Click “Save” to save the modifications made

❖ Click “Close” to close the editor-form

❖ To edit an existing contact-mechanism: Select the record to be modified by clicking on it, click on the "Notepad"-button and select "Edit"

❖ The Person Contact Mechanism Editor will populate

❖ Make the necessary modifications to the selected record

❖ Click "Save" to save the modifications made

❖ Click "Close" to close the editor-form

❖ Click the "Save"-button in the tool bar to save the changes made

❖ To delete an existing contact-mechanism: Select the record to be deleted by clicking on it, click on the "Notepad"-button and select "Delete"

❖ The contact-mechanism has been deleted

❖ Click on the "Registration"-tab to return to the main/default People-screen

Person Relationships

Add/Edit/Delete a person-to-person-relation

❖ Go to the “People Registration”-screen (default-screen when logging into CMS) by selecting “People” from the menu bar followed by People Management and find the appropriate crewmember’s record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select “People” from the menu bar followed by “Person Relationships” or click on the “Person Relationships”-button in the main screen (upper bar)

❖ To add a new person to person relation: Click into the “Person to Person Relations”-box (gray area) to place the focus into this area

❖ Click the “Add”-button in the tool bar to populate the “Person to Person Relationships Editor”

❖ Select “Role” and “Type of Relation” from the drop-down menus

❖ Click the “Search Person”-button to populate the “People Lookup”-form

❖ User the various search-criteria to locate the person and click “Find”

❖ Double-click on the record in the People Lookup-form to populate the person’s name in the editor-form

❖ Close the “Lookup”-form by clicking the window-close “X”-sign

❖ In the “Person to Person Relationships Editor” select the “Status” from the drop-down and enter the validity for the relationship

❖ Click the “Save”-button in the tool bar to confirm the addition

❖ To edit an existing person to person relation: Select the record to be modified by clicking on it and click on the “Edit”-button in the tool bar to populate the “Person to Person Relationships Editor”

❖ Make the necessary modifications to the selected record

❖ Click “Save” to save the modifications made

❖ Click “Close” to close the editor-form

❖ Click the “Save”-button in the tool bar to save the changes made

❖ To delete an existing person to person relation: Select the record to be deleted by clicking on it and click on the “Delete”-button in the tool bar

❖ The system will prompt the message “Do you want to delete the selected record?”

❖ Click “Yes” to confirm the deletion, click “No” to cancel the deletion

Add/Edit/Delete a person-to-organization-relation

❖ Go to the “People Registration”-screen (default-screen when logging into CMS) by selecting “People” from the menu bar followed by People Management and find the appropriate crewmember’s record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select “People” from the menu bar followed by “Person Relationships” or click on the “Person Relationships”-button in the main screen (upper bar)

❖ To add a new person to organization relation: Click into the “Person to Organization Relations”-box (gray area) to place the focus into this area

❖ Click the “Add”-button in the tool bar to populate the “Person to Organization Relationships Editor”

❖ Select “Role”, “Type of Relation” and “Organization” from the drop-down menus

❖ Enter the validity for the relationship

❖ Click the “Save”-button in the tool bar to confirm the addition

❖ To edit an existing person to organization relation: Select the record to be modified by clicking on it and click on the “Edit”-button in the tool bar to populate the “Person to Organization Relationships Editor”

❖ Make the necessary modifications to the selected record

❖ Click “Save” to save the modifications made

❖ Click “Close” to close the editor-form

❖ Click the “Save”-button in the tool bar to save the changes made

❖ To delete an existing person to organization relation: Select the record to be deleted by clicking on it and click on the “Delete”-button in the tool bar

- ❖ The system will prompt the message “Do you want to delete the selected record?”
- ❖ Click “Yes” to confirm the deletion, click “No” to cancel the deletion

Preferences & Career Path

Add/Edit/Delete a ship preference

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select "People" from the menu bar followed by "Preferences & Career Path" or click on the "Preferences & Career Path"-button in the main screen (upper bar)

❖ To add a new ship preference: Click into the "Ship Preference"-box (gray area) to place the focus into this area

❖ Click the "Add"-button in the tool bar to populate a new entry-line in the grid

❖ Select the ship from the drop-down of "Ship" and enter the validity for the preference

❖ Click the "Save"-button in the tool bar to confirm the addition

❖ To edit an existing ship preference: Select the record to be modified by clicking on it and click on the "Edit"-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the "Save"-button in the tool bar to save the changes made

❖ To delete an existing ship preference: Select the record to be deleted by clicking on it and click on the "Delete"-button in the tool bar

❖ The system will prompt the message "Do you want to delete the selected record?"

❖ Click "Yes" to confirm the deletion, click "No" to cancel the deletion

Add/Edit/Delete a ship-class preference

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select "People" from the menu bar followed by "Preferences & Career Path" or click on the "Preferences & Career Path"-button in the main screen (upper bar)

❖ To add a new ship class preference: Click into the “Ship Class Preference”-box (gray area) to place the focus into this area

❖ Click the “Add”-button in the tool bar to populate a new entry-line in the grid

❖ Select the ship from the drop-down of “Ship” and enter the validity for the preference

❖ Click the “Save”-button in the tool bar to confirm the addition

❖ To edit an existing ship class preference: Select the record to be modified by clicking on it and click on the “Edit”-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the “Save”-button in the tool bar to save the changes made

❖ To delete an existing ship class preference: Select the record to be deleted by clicking on it and click on the “Delete”-button in the tool bar

❖ The system will prompt the message “Do you want to delete the selected record?”

❖ Click “Yes” to confirm the deletion, click “No” to cancel the deletion

Add/Edit/Delete a person preference

❖ Go to the “People Registration”-screen (default-screen when logging into CMS) by selecting “People” from the menu bar followed by People Management and find the appropriate crewmember’s record by using the People Search (Lookup), e.g. search by crew ID as described under <u>Search/Lookup of a crewmember</u>

❖ Select “People” from the menu bar followed by “Preferences & Career Path” or click on the “Preferences & Career Path”-button in the main screen (upper bar)

❖ To add a new person preference: Click into the “Person Preference”-box (gray area) to place the focus into this area

❖ Click the “Add”-button in the tool bar to populate a new entry-line in the grid

❖ Click the “Person Search”-button to populate the “People Lookup”-form

❖ Search for the appropriate crewmember as described under <u>Search/Lookup of a crewmember</u>

❖ Select the appropriate crewmember-record in the list and drag & drop the record into the “Name”-field of the “Person Preferences”-box

❖ Enter the validity for the preference and tick whether or not this is a preferred person

❖ Click the "Save"-button in the tool bar to confirm the addition

❖ To edit an existing person preference: Select the record to be modified by clicking on it and click on the "Edit"-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the "Save"-button in the tool bar to save the changes made

❖ To delete an existing person preference: Select the record to be deleted by clicking on it and click on the "Delete"-button in the tool bar

❖ The system will prompt the message "Do you want to delete the selected record?"

❖ Click "Yes" to confirm the deletion, click "No" to cancel the deletion

Add/Edit/Delete a voyage preference

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select "People" from the menu bar followed by "Preferences & Career Path" or click on the "Preferences & Career Path"-button in the main screen (upper bar)

❖ To add a new voyage preference: Click into the "Voyage Preference"-box (gray area) to place the focus into this area

❖ Click the "Add"-button in the tool bar to populate a new entry-line in the grid

❖ Select the ship from the drop-down of "Ship" and select the applicable voyage from the drop-down menu of "Voyage"

❖ Tick whether or not this is a preferred voyage and enter the validity for the preference

❖ Click the "Save"-button in the tool bar to confirm the addition

❖ To edit an existing voyage preference: Select the record to be modified by clicking on it and click on the "Edit"-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the "Save"-button in the tool bar to save the changes made

❖ To delete an existing voyage preference: Select the record to be deleted by clicking on it and click on the "Delete"-button in the tool bar

❖ The system will prompt the message "Do you want to delete the selected record?"

❖ Click "Yes" to confirm the deletion, click "No" to cancel the deletion

Add/Edit/Delete a region preference

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select "People" from the menu bar followed by "Preferences & Career Path" or click on the "Preferences & Career Path"-button in the main screen (upper bar)

❖ To add a new region preference: Click into the "Region Preference"-box (gray area) to place the focus into this area

❖ Click the "Add"-button in the tool bar to populate a new entry-line in the grid

❖ Select the region from the drop-down of "Region" and enter the validity for the preference

❖ Click the "Save"-button in the tool bar to confirm the addition

❖ To edit an existing region preference: Select the record to be modified by clicking on it and click on the "Edit"-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the "Save"-button in the tool bar to save the changes made

❖ To delete an existing region preference: Select the record to be deleted by clicking on it and click on the "Delete"-button in the tool bar

❖ The system will prompt the message "Do you want to delete the selected record?"

❖ Click "Yes" to confirm the deletion, click "No" to cancel the deletion

Add/Edit/Delete a port preference

❖❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select "People" from the menu bar followed by "Preferences & Career Path" or click on the "Preferences & Career Path"-button in the main screen (upper bar)

❖ To add a new port preference: Click into the "Port Preference"-box (gray area) to place the focus into this area

❖ Click the "Add"-button in the tool bar to populate the Port Preference Editor-form

❖ Select the country and port from the drop-down menus "Country" and "Port" and tick "Port Expertise", if applicable

❖ Enter the validity for the preference and click the "Save"-button

❖ Click the "Save"-button in the tool bar to confirm the addition

❖ To edit an existing port preference: Select the record to be modified by clicking on it and click on the "Edit"-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click "Save" to save and close the editor-form

❖ Click the "Save"-button in the tool bar to save the changes made

❖ To delete an existing port preference: Select the record to be deleted by clicking on it and click on the "Delete"-button in the tool bar

❖ The system will prompt the message "Do you want to delete the selected record?"

❖ Click "Yes" to confirm the deletion, click "No" to cancel the deletion

Add/Edit/Delete career-path information (promotion-list)

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select “People” from the menu bar followed by “Preferences & Career Path” or click on the “Preferences & Career Path”-button in the main screen (upper bar)

❖ To add a career path entry: Click into the “Career Path”-box (gray area) to place the focus into this area

❖ Click the “Add”-button in the tool bar to populate a new entry-line in the grid

❖ Select the new position port from the drop-down menu “Position”

❖ Enter the effective-date by overwriting the default-date or by using the calendar which will appear if the drop-down menu is clicked

❖ Enter data into “Notes”, “Proposed by” and “Source”, if applicable (not mandatory)

❖ Click the “Save”-button in the tool bar to confirm the addition

❖ To edit an existing career path entry: Select the record to be modified by clicking on it and click on the “Edit”-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the “Save”-button in the tool bar to save the changes made

❖ To delete an existing career path entry: Select the record to be deleted by clicking on it and click on the “Delete”-button in the tool bar

❖ The system will prompt the message “Do you want to delete the selected record?”

❖ Click “Yes” to confirm the deletion, click “No” to cancel the deletion

Contract – Assignment – Events

Add/Edit/Delete a crewmember's CBA-type

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select "People" from the menu bar followed by "Contract – Assignment - Events" or click on the "Contract – Assignment - Events"-button in the main screen (upper bar)

❖ Click on the "Set CBA Type"-button to populate the "Default CBA Definition History-form

❖ To add a new CBA-type: Click on the "Add"-button – this will create a new entry-line

❖ Enter the dates for "Valid From"- and "Valid Until"-fields by clicking on the drop-down menu and selecting the new date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Select the appropriate contract-definition from the drop-down in the "Contract"-column

❖ Click the "Save"-button to save the addition

❖ A crewmember should always only have ONE valid CBA-type at any given time – the user must ensure that the validity of multiple CBA-types does not overlap!

❖ To modify an existing CBA-type: Select the CBA-type to be modified by clicking on the record

❖ Click on the "Edit"-button to enable the record for modifications

❖ Make the necessary modifications to the validity or contract

❖ Once completed, click the "Save"-button to save the changes made

❖ To delete an existing CBA-type: Select the CBA-type to be deleted by clicking on the record

❖ Click on the "Delete"-button

❖ The selected record has now been deleted

❖ In order to be able to maintain a history of CBAs for the crewmember, CBA-types should only be deleted in case a mistake was done in the setup. If the crewmember changes his/her contract definition, the current (old) contract definition's end-date should be modified and a new record should be created for the new contract definition

Edit wage-information for a current assignment

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select "People" from the menu bar followed by "Contract – Assignment - Events" or click on the "Contract – Assignment - Events"-button in the main screen (upper bar)

❖ Select the current contract by clicking on the record in the "Contracts"-box – this will populate the associated contract standard wages in the "Contract Standard Wages"-box

❖ As any modifications made in for contract standard wages will have an impact on the crewmember's payroll, only a current contract's wage-information can be modified. Modifications needed for a contract in the past will have to be handled with a manual payroll-adjustment in the current or future payroll-period.

❖ Click on the "New Wage"-button to populate the "Wages Change"-form

❖ Make the necessary modifications to the crewmember's wages (currency, unit of measurement, effective date, wage rate, vacation-percentage, overtime etc.) as needed

❖ Due to Accounting-reasons, the system will not allow any retrospective modifications – the effective date can only be today's date or a date in the future (any modifications for the past will have to be made in a manual adjustment on the current payroll). If a date in the past is entered, the system will prompt the following message "Effective date cannot be lesser than today's date", click "OK" or "Cancel" to return to the form to make the necessary change in effective date

❖ Once completed, click the "Save Event"-button to save the changes made

❖ The additional scheduled wage-change now also reflects in the "Contract Standard Wages"-box

❖ A deletion of a scheduled wage-change is not possible in this form, an existing record can only be set to be inactive with the help of the effective date and the wage-amount

Add/Edit a new assignment

❖ As all assignments should be scheduled ahead of time and therefore pertain to the future. All scheduling for the future is handled via the scheduling-tools Tabular-, Gantt- and/or Auto-Scheduler. Only in very rare case of an unexpected boarding should there be the need to manually add a new assignment in the Contract – Assignment-screen!

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select "People" from the menu bar followed by "Contract – Assignment - Events" or click on the "Contract – Assignment - Events"-button in the main screen (upper bar)

❖ A new assignment should NEVER be added to a crewmember who is currently in onboard!

❖ To add a new assignment: Click on the "Assignment"-button to populate the "Contract - Assignment or Event Editor"

❖ Select the ship of the new contract from the drop-down menu "Ship"

❖ Enter the contract's start- and end-date in the "From"- and "Until"-fields by clicking on the drop-down menu and selecting the new date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Select the manning-agency from the drop-down "Agent"

❖ Click the "Save and Set Assignment"-button – this will populate the assignment-details

❖ Verify that the assignment-details are correct, enter port-/travel-days and payroll-specifics, if applicable and select the position-slot the crewmember will occupy

❖ Once completed, click on the "Save Assignment and Configure Wages"-button

❖ If the wages are not defined in the crewmember's contract-definition, the system will prompt the following reminder-message "Missing wage configuration, proceed to configure wages manually!", click "OK" to proceed

❖ Enter the wage-details (currency, unit of measurement, effective date, wage rate, vacation-percentage, overtime etc.) as needed – once completed, click “Save Wage and Close”

❖ The newly created assignment will now show in the “Current Assignment/Event”-list

❖ Click the “Save”-button in the tool bar followed by “Refresh”

❖ To modify a newly created assignment: Click on the newly created assignment in the “Current Assignment/Event”-list

❖ Click the “Edit”-button to populate the “Assignment – Events Editor”

❖ Make the necessary modifications – once completed, click the “Save”-button to save the changes made

❖ Click the “Save”-button in the tool bar followed by “Refresh”

Add/Edit a new event

❖ As all events are in general triggered by the crew states machine and the auto-confirmation-process, there should be only in very few business-scenarios which require a new event to be added or modified manually in the Contract – Assignment-screen!

❖ Go to the “People Registration”-screen (default-screen when logging into CMS) by selecting “People” from the menu bar followed by People Management and find the appropriate crewmember’s record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select “People” from the menu bar followed by “Contract – Assignment - Events” or click on the “Contract – Assignment - Events”-button in the main screen (upper bar)

❖ To add a new event: Click the “Event”-button to populate the “Assignments – Events Editor”

❖ Select the appropriate event-reason from the drop-down “Event-Reason”

❖ The setup of the crew states machine will determine which events are allowed to be added as a logical sequence of the last existing event, hence you will only be able to select from a limited number of different events!

❖ Select the ship, the department and position from the respective drop-down menus

❖ Enter the start- and expected end-date by clicking on the drop-down menu and selecting the new date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Click the "Save"-button to save the addition

❖ The newly created event will now show in the "Current Assignment/Event"-list

❖ Click the "Save"-button in the tool bar followed by "Refresh"

❖ To modify a newly created event: Click on the newly created event in the "Current Assignment/Event"-list

❖ Click the "Edit"-button to populate the "Assignment – Events Editor"

❖ Make the necessary modifications – once completed, click the "Save"-button to save the changes made

❖ Click the "Save"-button in the tool bar followed by "Refresh"

Add/Edit/Delete a cost-center for a crewmember's assignment

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under <u>Search/Lookup of a crewmember</u>

❖ Select "People" from the menu bar followed by "Contract – Assignment - Events" or click on the "Contract – Assignment - Events"-button in the main screen (upper bar)

❖ To add a new cost-center to an existing assignment: Select the appropriate assignment in the "Current Assignment/Event"-list by clicking on the record

❖ Click the "New"-button in the "Cost Center Variations"-box to populate the "Assignment Cost Center Variation from Contract History"-form

❖ Select the cost-center from the drop-down "Cost Center"

❖ Enter the date-range the cost-center should be effective for by clicking on the drop-down menus "From" and "Until" and selecting the new date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Click the “Save”-button to save the addition

❖ Click the “Save”-button in the tool bar followed by “Refresh”

❖ To modify an existing cost-center: Select the appropriate assignment in the “Current Assignment/Event”-list by clicking on the record

❖ Select the cost-center to be modified by clicking on the record

❖ Click the “Edit”-button

❖ Make the necessary modifications to the cost-center and/or the validity – once completed, click the “Save”-button to save the changes made

❖ Click the “Save”-button in the tool bar followed by “Refresh”

❖ To delete an existing cost-center: Select the appropriate assignment in the “Current Assignment/Event”-list by clicking on the record

❖ Select the cost-center to be deleted by clicking on the record

❖ Click the “Delete”-button

❖ The system will prompt the following message “Do you want to delete the selected record?”, click “Yes” to confirm the deletion, click “No” to cancel the deletion-process

❖ Click the “Save”-button in the tool bar followed by “Refresh”

Edit a crewmember’s longevity

❖ Go to the “People Registration”-screen (default-screen when logging into CMS) by selecting “People” from the menu bar followed by People Management and find the appropriate crewmember’s record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select “People” from the menu bar followed by “Contract – Assignment - Events” or click on the “Contract – Assignment - Events”-button in the main screen (upper bar)

❖ Click the “Edit”-button in the “Longevity”-box to populate the “Longevity Editor”

❖ Enter the new date of hire into the “Date of Hire”-field by clicking on the drop-down menu and selecting the new date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Enter the previously accrued days worked and the previous business hire-date into the respective fields

❖ Click the “Save”-button to save the changes made

❖ Click the “Save”-button in the tool bar followed by “Refresh”

❖ Recover Previous Values

Travel

Add/Edit/Delete a travel-document (passport, visa, yellow fever vaccination etc.)

❖ Go to the “People Registration”-screen (default-screen when logging into CMS) by selecting “People” from the menu bar followed by People Management and find the appropriate crewmember’s record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select “People” from the menu bar followed by “Person Travel Data” or click on the “Travel”-button in the main screen (upper bar)

Side-note: The “Person Travel Data”-screen is also available via selecting “Travel Management” from the menu bar

❖ To add a travel document: Click into the “Documents List”-box (white area) to place the focus into this area

❖ Click the “Add”-button in the tool bar to populate a new entry-line in the grid

❖ Select the issue country from the drop-down for “Nation” and the document type from the drop-down for “Document Type”

❖ Enter the document number into the “Document Number”- field and the issue place into the “Issued Place”-field

❖ Enter the effective-date by overwriting the default-date or by using the calendar which will appear if the drop-down menu is clicked

❖ Click the “Save”-button in the tool bar to confirm the addition

❖ To edit an existing travel document: Select the record to be modified by clicking on it and click on the “Edit”-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the “Save”-button in the tool bar to save the changes made

❖ To delete an existing travel document: Select the record to be deleted by clicking on it and click on the “Delete”-button in the tool bar

❖ The system will prompt the message “Do you want to delete the selected record?”

❖ Click “Yes” to confirm the deletion, click “No” to cancel the deletion

Add/Edit/Delete a crewmember's home airport

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under <u>Search/Lookup of a crewmember</u>

❖ Select "People" from the menu bar followed by "Person Travel Data" or click on the "Travel"-button in the main screen (upper bar)

Side-note: The "Person Travel Data"-screen is also available via selecting "Travel Management" from the menu bar

❖ To add a new home airport: Click into the "Home Airport"-box (white area) to place the focus into this area

❖ Click the "Add"-button in the tool bar to populate a new entry-line in the grid

❖ Select the country from the drop-down for "Country" and the airport from the drop-down for "Airport"

❖ Enter the effective-date by overwriting the default-date or by using the calendar which will appear if the drop-down menu is clicked

❖ The field "Travel Per Diem Enabled" is not used

❖ Click the "Save"-button in the tool bar to confirm the addition

❖ Due to the automatic travel-booking component integrated into CMS, the system will only allow one valid home airport per crewmember. A restriction and verification has been inbuilt in regards to the records' validity to ensure multiple records are not overlapping and allowing more than one to be valid at any given time! Multiple entries can be created, however, the "Valid From"-date for any new addition will impact the "Valid To"-date of any already existing record!

❖ To edit an existing home airport: Select the record to be modified by clicking on it and click on the "Edit"-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the "Save"-button in the tool bar to save the changes made

❖ To delete an existing home airport: Select the record to be deleted by clicking on it and click on the "Delete"-button in the tool bar

❖ The system will prompt the message “Do you want to delete the selected record?”

❖ Click “Yes” to confirm the deletion, click “No” to cancel the deletion

Add/Edit/Delete a Frequent Flyer Card

❖ Go to the “People Registration”-screen (default-screen when logging into CMS) by selecting “People” from the menu bar followed by People Management and find the appropriate crewmember’s record by using the People Search (Lookup), e.g. search by crew ID as described under <u>Search/Lookup of a crewmember</u>

❖ Select “People” from the menu bar followed by “Person Travel Data” or click on the “Travel”-button in the main screen (upper bar)

Side-note: The “Person Travel Data”-screen is also available via selecting “Travel Management” from the menu bar

❖ To add a frequent flyer card: Click into the “Frequent Flyer Codes”-box (white area) to place the focus into this area

❖ Click the “Add”-button in the tool bar to populate a new entry-line in the grid

❖ Select the airline from the drop-down for “Airline”

❖ Enter the frequent flyer card number into the “Frequent Flyer Number”- field and any applicable premier code into the “Premier Code”-field

❖ Click the “Save”-button in the tool bar to confirm the addition

❖ To edit an existing frequent flyer card: Select the record to be modified by clicking on it and click on the “Edit”-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the “Save”-button in the tool bar to save the changes made

❖ To delete an existing frequent flyer card: Select the record to be deleted by clicking on it and click on the “Delete”-button in the tool bar

❖ The system will prompt the message “Do you want to delete the selected record?”

❖ Click “Yes” to confirm the deletion, click “No” to cancel the deletion

Add/Edit/Delete a seating preference

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select "People" from the menu bar followed by "Person Travel Data" or click on the "Travel"-button in the main screen (upper bar)

Side-note: The "Person Travel Data"-screen is also available via selecting "Travel Management" from the menu bar

❖ To add a seating preference: Click into the "Seating Preference"-box (white area) to place the focus into this area

❖ Select the seating preference from the drop-down for "Travel Seating"

❖ Click the "Save"-button in the tool bar to confirm the addition

❖ To edit an existing seating preference: Select the record to be modified by clicking on it and click on the "Edit"-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the "Save"-button in the tool bar to save the changes made

❖ To delete an existing seating preference: Select the record to be deleted by clicking on it and click on the "Delete"-button in the tool bar

❖ The system will prompt the message "Do you want to delete the selected record?"

❖ Click "Yes" to confirm the deletion, click "No" to cancel the deletion

Add/Edit/Delete dietary restrictions

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select "People" from the menu bar followed by "Person Travel Data" or click on the "Travel"-button in the main screen (upper bar)

Side-note: The “Person Travel Data”-screen is also available via selecting “Travel Management” from the menu bar

❖ To add a dietary restriction: Click into the “Dietary Restrictions”-box (white area) to place the focus into this area

❖ Select the dietary restriction from the drop-down for “Diet”

❖ Click the “Save”-button in the tool bar to confirm the addition

❖ To edit an existing dietary restriction: Select the record to be modified by clicking on it and click on the “Edit”-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the “Save”-button in the tool bar to save the changes made

❖ To delete an existing dietary restriction: Select the record to be deleted by clicking on it and click on the “Delete”-button in the tool bar

❖ The system will prompt the message “Do you want to delete the selected record?”

❖ Click “Yes” to confirm the deletion, click “No” to cancel the deletion

View a crewmember’s current travel itinerary

❖ Go to the “People Registration”-screen (default-screen when logging into CMS) by selecting “People” from the menu bar followed by People Management and find the appropriate crewmember’s record by using the People Search (Lookup), e.g. search by crew ID as described under <u>Search/Lookup of a crewmember</u>

❖ Select “People” from the menu bar followed by “Person Travel Data” or click on the “Travel”-button in the main screen (upper bar)

Side-note: The “Person Travel Data”-screen is also available via selecting “Travel Management” from the menu bar

❖ The crewmember’s current travel itinerary will display in der “Current Travel Itinerary”-section of the form (read only, no modifications are possible!)

Money Transfers

Currently not being used until further notice

Licenses & Certifications

Add/Edit/Delete a license or certificate

❖ Go to the “People Registration”-screen (default-screen when logging into CMS) by selecting “People” from the menu bar followed by People Management and find the appropriate crewmember’s record by using the People Search (Lookup), e.g. search by crew ID as described under Search/Lookup of a crewmember

❖ Select “People” from the menu bar followed by “Licenses & Certifications” or click on the “Licenses & Certifications”-button in the main screen (upper bar)

❖ To add a new license/certification: Click into the “Licenses & Certifications”-box (white area) to place the focus into this area

❖ Click the “Add”-button in the tool bar to populate the Licenses & Certifications Editor-form

❖ Select the license/certification from the drop-down for “Certification” and the issuing source from the drop-down for “Source”

❖ Enter the name of the issuing authority into the “Issue by”- field and the issue place into the “Issue Place”-field

❖ Select the issue country from the drop-down for “Issue Country”

❖ Tick the check-box for “approved”, enter the validity of the license/certification and any applicable reference-/license-number

❖ Optional upload of scanned copy of license/certificate: Click the “Upload Image”-button. This will open the window to locate the image-file. Select the image-file and click “Open”. The scan will on the right-hand side of the-form after the addition of the new license/certification has been saved.

❖ Click the “Save”-button and the “Close”-button to close the editor-form

❖ Click the “Save”-button in the tool bar to confirm the addition

❖ To edit an existing license/certification: Select the record to be modified by clicking on it and click on the “Edit”-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record in the editor-form

❖ Click the “Save”-button to save the changes made

❖ Click the “Save”-button in the tool bar

❖ To delete an existing license/certification: Select the record to be deleted by clicking on it and click on the "Delete"-button in the tool bar

❖ The system will prompt the message "Do you want to delete the selected certification?"

❖ Click "Yes" to confirm the deletion, click "No" to cancel the deletion

Courses

Add/Edit/Delete a course/training

❖ Go to the “People Registration”-screen (default-screen when logging into CMS) by selecting “People” from the menu bar followed by People Management and find the appropriate crewmember’s record by using the People Search (Lookup), e.g. search by crew ID as described under <u>Search/Lookup of a crewmember</u>

❖ Select “People” from the menu bar followed by “Courses” or click on the “Courses”-button in the main screen (upper bar)

❖ CMS has an interface-link to LMS – any courses/trainings completed via LMS, will automatically be reflected in CMS, no additional manual entry is needed for these courses/trainings, hence only any courses/trainings which are not acquired via LMS should be manually entered into CMS.

❖ To add a new course: Click into the “Courses”-box (white area) to place the focus into this area

❖ Click the “Add”-button in the tool bar to populate the Person’s Courses Editor-form

❖ Select the training location from the drop-down for “Training Location” and the course/training from the drop-down for “Course”

❖ Enter the acquirement-date in the “Audit Date”- field as well as comments into the “Comments” text box and any additional location description in the “Location Description”-field, if applicable

❖ Enter the test-score (numeric values only!) in the “Test Score”-field where applicable and enter the validity of the course/training

❖ Click the “Save”-button and the “Close”-button to close the editor-form

❖ Click the “Save”-button in the tool bar to confirm the addition

❖ To edit an existing course: Select the record to be modified by clicking on it and click on the “Edit”-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record in the editor-form

❖ Click the “Save”-button to save the changes made

❖ Click the “Save”-button in the tool bar

❖ To delete an existing course: Select the record to be deleted by clicking on it and click on the “Delete”-button in the tool bar

❖ The system will prompt the message “Do you want to delete the selected certification?”

❖ Click “Yes” to confirm the deletion, click “No” to cancel the deletion

Person Skills

Add/Edit/Delete a skill (language-skill in particular)

❖ Go to the "People Registration"-screen (default-screen when logging into CMS) by selecting "People" from the menu bar followed by People Management and find the appropriate crewmember's record by using the People Search (Lookup), e.g. search by crew ID as described under <u>Search/Lookup of a crewmember</u>

❖ Select "People" from the menu bar followed by "Person Skills" or click on the "Person Skills"-button in the main screen (upper bar)

❖ During the initial CMS-phase, this functionality will only be used to record the crewmember's language-skills, any other skills will not be capture until a later phase.

❖ To add a new language: Click into the "Person Skill"-box (white area) to place the focus into this area

❖ Click the "Add"-button in the tool bar to populate the Person's Skills Editor-form

❖ Select "Languages" from the drop-down for "Skills Class" and the appropriate language from the drop-down for "Skill"

❖ Enter the proficiency in a percentage (numeric value only, do not enter the "%"-sign)

❖ Enter notes into the "Notes"-field, if applicable

❖ Click the "Save"-button in the editor-form

❖ Click the "Save"-button in the tool bar to confirm the addition

❖ To edit an existing language: Select the record to be modified by clicking on it and click on the "Edit"-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record in the editor-form

❖ Click the "Save"-button to save the changes made

❖ Click the "Save"-button in the tool bar

❖ To delete an existing language: Select the record to be deleted by clicking on it and click on the "Delete"-button in the tool bar

❖ The system will prompt the message "Do you want to delete the selected skill?"

❖ Click "Yes" to confirm the deletion, click "No" to cancel the deletion

Section V: Scheduling/Tabular

This section will cover:

- ☐ Overview Tabular-Scheduler
- ☐ Selection criteria
- ☐ Schedule Headers
- ☐ Scheduled repatriations-, scheduled embarkations- and available resources-box
- ☐ Business-Scenarios

- Early repatriation – end of contract
- Early repatriation – compassionate leave with return after short leave (no replacement for interim period)
- Early repatriation – medical leave (recovery for next assignment)
- Adjusting a crewmember's availability-date
- Repatriation in a port which is not a pre-defined manning-port
- Contract-extension
- View available resources for a position
- Scheduling a replacement/resource for a repatriating crewmember
- Scheduling an overlap
- Scheduling a position-change
- Scheduling a ship-transfer
- Modify a crewmember's repatriation-reason
- Add/Edit/Delete a cost-center for an assignment of a scheduled embarkation
- Add/Edit/Delete salary-information for a scheduled embarkation
- Rectify (delete) incorrect scheduling
- View a crewmember's biographic-, contract history- and relations-details
- View an embarking crewmember's licenses and certifications

- View an embarking/disembarking crewmember's travel request history
- View an embarking/disembarking crewmember's travel itinerary
- View an embarking/disembarking crewmember's hotel request
- View an embarking/disembarking crewmember's transfer request
- View an embarking/disembarking crewmember's contact-details
- Add/Delete a position-slot

Overview Tabular-Scheduler

The Tabular-Scheduler is the first of three scheduling-tools within CMS. Whereas the Gantt-Scheduler displays the crew-schedules in bar-charts, the Tabular-Scheduler illustrates them in a linear overview.

Similar like in the Gantt-Scheduler, the user can utilize the various selection-filters to customize which schedule-information is displayed.

Selection criteria

The Tabular Scheduler has 4 main selection criteria which determine the information populated: Ship, date-range ("From"/"To"), Departments and Positions

❖ In order to select the ship to be displayed, click on the drop-down "Ship"

❖ The record "NAP" is not an actually ship, but stands for "Not Applicable". The user can only select one ship at the time from the drop-down menu.

❖ Selecting the ship from the drop-down will automatically trigger the schedule-header below to update according to the ship's itinerary

❖ In order to select the date-range to be displayed, change the "From"- and "To"-fields to the new dates by clicking on the drop-down menu and selecting the new date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ In order to select the department(s) to be displayed, click on the drop-down "Departments"

❖ Clicking once on "(Show All)" will select all departments at the same time, clicking on the same record for a second time will de-select all departments. The selections "ALL DEPARTMENTS" and "NOT APPLICABLE" should not be used!.

❖ In order to select the position(s) to be displayed, click on the drop-down "Positions"

❖ The drop-down for positions will only populate if the department(s) has been selected beforehand! Chosing the department will function as a filter, if only one particular department has been chosen, the drop-down "Positions" will only list the positions that pertain to this previously selected department.

❖ Clicking once on "(Show All)" will select all postions at the same time, clicking on the same record for a second time will de-select all positions.

Schedule Headers

The Schedule Headers are an important component of the scheduling-tool as they not only represent the ship's itinerary, respectively the authorized manning-ports, but they also impact the "Scheduled Repatriations"-, "Scheduled Embarkations"- and "Available Resources"-boxes.

The majority of the schedule headers are created automatically by the system based on the itinerary received from MXP and the setup of authorized manning ports in FC Administration. The user has also the possibility to manually create additional schedule-headers as needed, however, this should rather be on an exception-basis.

The "Date"-field shows the date the ship calls in the respective port, the "Description"-field lists the name of the port or the description chosen when manually creating a schedule-header

❖ The description "Migrated from SGP" indicates that this schedule-header was created in the process of the data-migration from SGP to CMS. Generally speaking, these schedule-headers had to be created as SGP-assignments existed for non-authorized ports or for incorrect dates (sea-days) and as otherwise a migration of these schedules would have not been possible

❖ In order to see more detailed information pertaining to each schedule-header, select the record from the listing and click on the arrows to expand the Manning Header-box

❖ In order to see more detailed itinerary-information pertaining to each date/port, select the record from the listing and click on the arrows to expand the Itinerary-box

❖ The system uses different colors to further define differences between the schedule-headers:

- No color: Standard schedule-header for call in an authorized manning-port
- Dark blue: Schedule-header select by the user
- Light blue: Schedule-header for a manning-port which is associated with a travel-block (block-date)

- Light green: Schedule-header for a turn-around port
- Red: Schedule-header which has been created manually for a non-authorized port or sea-day (Emergency-/Non-planner Schedule Header)
- Gray: Schedule-header for a manning-port which has been deleted from the itinerary by MXP, but which still has crew-movements associated to it and need to be re-scheduled due to the itinerary-change

❖ To create a new schedule-header (manually): Select any schedule-header to place the focus into the "Schedule Headers"-listing

❖ Click on the "Add"-button in the tool-bar to populate the "Scheduling Header Editor"

❖ Enter the schedule-header's reference and description in the respective free-text fields

❖ Select the appropriate date/port from the "List of Manning Ports"

❖ Click on the "Save"-button to save the addition

❖ Click on the "Save"-button in the tool bar followed by "Refresh"

❖ If a new schedule-header needs to be created for a date/port currently not listed in the "List of Manning Ports" within the editor-form, the user first needs to create an entry for this date/port in Scheduling/Manning Ports Management/Manning Ports List before it becomes available as a selection in the editor-form! (Refer to section VII Manning Ports Managemnet for a detailed description)

❖ To modify an existing schedule-header: Select the schedule-header to be modified by clicking on it

❖ Click on the "Edit"-button in the tool-bar to populate the "Scheduling Header Editor"

❖ Modify the schedule-header as needed and click the "Save"-button

❖ Click the "Close"-button to close the editor-form

❖ In the "Scheduler Header Editor" the fields "Reference" and "Description" are free-text-fields and can be overwritten as needed. The fields "Manning Date" and "Port" can only be modified by selecting a different record in the "List of Manning Ports". Modifications to the fields Type" and "Status" can only be made by selecting a different option from the respective drop-down menus. No modifications should be made to the field "Ship" in this form!

❖ To delete an existing schedule-header: Select the schedule-header to be deleted by clicking on it

❖ Click on the "Delete"-button in the tool-bar

❖ The schedule-header will instantly be deleted, unless there are still crew-movements (scheduled embarkations/repatriations) associated with this schedule-header

❖ If there are schedules associated to the schedule-header, the system will prompt the following message "There are scheduled resources for this list. Note that if confirmed, you will delete other resources linked to the selected header that you may not be able to see. Do you want to continue?", click "Yes" to delete the schedule-header and any linked schedules, click "No" to cancel the deletion-process

Recommended repatriations-, scheduled repatriations-, scheduled embarkations- and available resources-box

Recommended Repatriations-box

The "Recommended Repatriation"-box will display all crewmembers who have reached and/or exceeded their end of contract and have not been scheduled for a repatriation yet in red. Each one of these crewmembers needs to be scheduled for repatriation. Ideally, this box would never contain any crewmembers marked in red as all have been scheduled to repatriate on a specific date.

❖ In order to schedule a crewmember for a repatriation, select the crewmember's repatriation-date (port) from the "Schedule Headers"

❖ Select the crewmember's record in the "Recommended Repatriations"-box by clicking on it and drag and drop the crew-record into the "Scheduled Repatriations"-box

Scheduled Repatriations-box

The "Scheduled Repatriation"-box will display all crewmember scheduled to disembark on a specific date.

The information displayed is updated as the user selects a different schedule-header (date/port) in the "Schedule Headers"-listing.

The filters department and positions also impact the information displayed, e.g. if the department “Administration” and all positions are set as criteria, the “Scheduled Repatriations”-box will only display any disembarking crewmembers who belong to the Administration-department!

The selection of a position-slot within the Tabular-view will not impact the display of the scheduled repatriations.

The “Scheduled Repatriations”-box contains two tabs: the “Sign-Off Schedule”- and the “Sign-Off Replacement Schedule Progress”-tab. Whereas the first mentioned allows a detailed overview of the crewmembers scheduled to repatriate and to modify their records, the second tab only shows a graphic overview of the scheduled repatriations.

Within the “Scheduled Repatriations”-box, the user has the possibility to retrieve the crewmember’s contact-details, licenses and certifications and information regarding travel-arrangements via different functionality-buttons. In addition, an export-functionality is available to create a list of all scheduled repatriations.

Scheduled Embarkations-box

The “Scheduled Embarkations”-box will display all crewmember scheduled to embark on a specific date.

The information displayed is updated as the user selects a different schedule-header (date/port) in the “Schedule Headers”-listing.

The filters department and positions also impact the information displayed, e.g. if the department “Administration” and all positions are set as criteria, the “Scheduled Embarkations”-box will only display any embarking crewmembers who belong to the Administration-department!

The selection of a position-slot within the Tabular-view will not impact the display of the scheduled embarkations.

The “Scheduled Embarkations”-box contains two tabs: the “Sign-On Schedule”- and the “Cost Center Variations Schedule”-tab. Whereas the first mentioned allows a detailed overview of the crewmembers scheduled to embark and to modify their records, the second tab allows the user to add/edit/delete cost-centers that might need to be tied to a scheduled embarkation/assignment.

Within the “Scheduled Embarkations”-box, the user has the possibility to retrieve the crewmember’s contact-details, licenses and certifications, information regarding travel-arrangements and manage scheduled standard wage via different functionality-buttons. In addition, an export-functionality is available to create a list of all scheduled embarkations.

Available Resources-box

The “Available Resources”-box will display all crewmembers who are available as a replacement/resource for a specific date/date-range.

The information is populated as the user selects a different schedule-header (date/port) in the “Schedule Headers”-listing AND a scheduled repatriation in the “Scheduled Repatriations”-box

The “Available resources”-box also reacts to the selection of a position-slot in the “Positions Slots”-listing, however, opposed to the Gantt-Scheduler, the Tabular-Scheduler’s “Available Resources”-box is based on the logic of finding a replacement for a repatriating crewmember, hence the automatic refresh of the resources will revert back to the default of the “Scheduled Repatriations”-box, i.e. refreshing to the crewmember’s position which had last been selected in the “Scheduled Repatriations”-box

Example: The user has selected a 4^{th} Engineer’s record in the “Scheduled Repatriations”-box and scheduled a replacement for this crewmember. Afterwards, the user clicks on the position-slot for a Purser – the “Available Resources”-box will refresh to show available crewmembers in the Purser-position. With the next auto-refresh-process (based on parameter-setting: ½ min - 1 min), however, the system defaults back to the last selected position of a repatriation-record and hence now shows again available resources for the 4^{th} Engineer-position.

Crewmembers who have a future schedule will also appear in the different tabs of the “Available Resources”-box, but they will appear as highlighted records in gray and will also have the start-date of the scheduled assignment listed in the “Scheduled”-column. Since a crewmember can have multiple future assignments in the future and multiple different availability-dates based on his future schedules, records might appear multiple times as an available resource.

The “Available Resources”-box contains four different tabs: the “Standard Availability”-, the “From Equivalent Positions”-, the “From Career”- and the “On Leave”-tab. Each tab follows a different logic to determine the pool of crewmembers available:

❖ Standard Availability: The "Standard Availability"-tab will list any crewmembers who have reached their availability-date at the date selected in the schedule-header, respectively within the 15-day-range of the date selected, e.g. if the date selected in the schedule-header is 10/09/10, the date-range for the standard-availability is 09/25 to 10/24 and any crewmember (who is holding the position selected) with an availability-date within this date-range would show

❖ From Equivalent Positions: The "From Equivalent Positions"-tab will list any crewmembers who are holding a position which has been set up as an equivalent position to the position queried and who have an availability-date within the date-range selected

⚠ Selecting a crewmember from this tab as a resource will actually perform a change of position during the drag-&-drop-process!

❖ From Career: The "From Equivalent Positions"-tab will list any crewmembers who have been placed on the promotion-list for position queried and the effective-date (see "Effective Date" in People/Preferences & Career Path/Career Path) for this possible promotion is within the date-range selected.

⚠ Selecting a crewmember from this tab as a resource will actually perform a change of position during the drag-&-drop-process!

❖ On Leave: The "On Leave"-tab will list any crewmembers who are currently in a status "Active/On Vacation"

⚠ The system does currently not perform any calculation for a future "Active/On Vacation"-status!

Within the "Available Resources"-box, the user has not only the possibility to select a crewmember as a replacement for a repatriating crewmember, but the user can also retrieve the crewmember's contact-details, information regarding preferences and modify the availability-date via different functionality-buttons. In addition, an export-functionality is available to create a list of all available resources.

Business-Scenarios

Please note that the below scenarios mainly describe business-scenarios performed for crewmembers currently onboard

Early repatriation – end of contract

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s new repatriation-date (port) from the “Schedule Headers”

❖ Search the crewmember by entering either the crew-ID or the name/partial name into the “Find Resource”-field and press “Enter” to execute the search

❖ Click the “Other Reasons”-button to populate the “Other Sign-Off Schedule”-form

❖ Click the “Override Availability Date”-button and enter the appropriate new availability-date, if applicable.

❖ The crewmember’s availability-date will only have to be set manually if it should differ from the parameters defined in the contract-definitions (in case of a shorter/longer vacation).

❖ Click the “Save”-button to save the change

❖ If another crewmember is scheduled for the future in this position-slot, the system prompts following informational message “Resource for selected position slot already scheduled. Resource #.... On date: mm/dd/yy schedule-reference#”, click “OK” to proceed followed by “Close” to close the form

❖ Click “Save” in the tool bar followed by “Refresh”

❖ The crewmember’s record will now display in the Tabular with the revised repatriation-date

❖ When selecting the date of the repatriation in the schedule header list, the crewmember’s record will also be displayed in the “Scheduled Repatriations”-box

Early repatriation – compassionate leave with return after short leave (no replacement for interim period)

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s new repatriation-date (port) from the “Schedule Headers”

❖ Search the crewmember by entering either the crew-ID or the name/partial name into the “Find Resource”-field and press “Enter” to execute the search

❖ Click the “Other Reasons”-button to populate the “Other Sign-Off Schedule”-form

❖ Select the repatriation-reason “Compassionate” from the drop-down menu “Reason”

❖ Click the “Override Availability Date”-button and enter the appropriate the new availability-date (earliest return-date from compassionate-leave)

❖ Click the “Save”-button to save the change

❖ If another crewmember is scheduled for the future in this position-slot, the system prompts following informational message “Resource for selected position slot already scheduled. Resource #.... On date: mm/dd/yy schedule-reference#”, click “OK” to proceed followed by “Close” to close the form

❖ Click “Save” in the tool bar followed by “Refresh”

❖ The crewmember’s record will now display in the Tabular with the revised repatriation-date

❖ When selecting the date of the repatriation in the schedule header list, the crewmember’s record will also be displayed in the “Scheduled Repatriations”-box

❖ In order to schedule the crewmember’s return from the compassionate leave, select the manning-header for the earliest return-date

❖ Go to the crewmember’s position-slot of the current assignment (search via “Find Resource”-field)

❖ Selecting the position-slot and the schedule-header will trigger the available resources to populate in the “Available Resources”-box

❖ Select the crewmember in the “Available Resources”-box (Standard Availability-tab) by clicking on the record and drag & drop it from the “Available Resources”-box into the “Scheduled Embarkations”-box

❖ Click “Save” in the tool bar

❖ Click “Refresh” in the tool bar to update the Tabular with the new schedule-information

❖ When selecting the date of the embarkation in the schedule header list, the crewmember’s record will also be displayed in the “Scheduled Embarkations”-box

Early repatriation – medical leave (recovery for next assignment)

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s new repatriation-date (port) from the “Schedule Headers”

❖ Search the crewmember by entering either the crew-ID or name/partial name into the “Find Resource”-field and press “Enter” to execute the search

❖ Click the “Other Reasons”-button to populate the “Other Sign-Off Schedule”-form

❖ Select the repatriation-reason “Medical” from the drop-down menu “Reason”

❖ Click the “Save”-button to save the change

❖ Click “Save” in the tool bar followed by “Refresh”

❖ The crewmember’s record will now display in the Tabular with the revised repatriation-date

❖ When selecting the date of the repatriation in the schedule header list, the crewmember’s record will also be displayed in the “Scheduled Repatriations”-box

❖ Selecting the sign-off reason “Medical” will automatically place the crewmember into the status “Suspended” and the crewmember will NOT show as an available resource until he/she has manually been recovered and placed into an “Active/Available”-status. To recover and to change a crewmember’s status, go to People/People Management/Contract – Assignment – Events and add a new event (please refer to **Section IV People** for more detailed instructions)

Adjusting a crewmember's availability-date

❖ For a crewmember currently onboard/scheduled for repatriation:

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Tabular Scheduler" to populate the "Tabular Scheduler"-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember's repatriation-date (port) from the "Schedule Headers" - the crewmembers scheduled for repatriation on this specific date will now be displayed in the "Scheduled Repatriations"-box

❖ Locate the crewmember in the "Scheduled Repatriations"-box and double-click on the record to open the "Scheduler Details Editor"-form

❖ Change the "Scheduled Available Date" to the new availability-date by clicking on the drop-down menu and selecting the new date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Click the "Save"-button to save the new availability-date and click "Close" to close the editor-form

❖ Click "Save" in the tool bar followed by "Refresh"

❖ For a crewmember currently not onboard/scheduled for embarkation:

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Tabular Scheduler" to populate the "Tabular Scheduler"-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember's embarkation-date (port) from the "Schedule Headers" – the crewmembers scheduled for embarkation on this specific date will now be displayed in the "Scheduled Embarkations"-box

❖ Locate the crewmember in the "Scheduled Embarkations"-box and double-click on the record to open the "Scheduler Details Editor"-form

❖ Change the "Scheduled Available Date" to the new availability-date by clicking on the drop-down menu and selecting the new date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Click the “Save”-button to save the new availability-date and click “Close” to close the editor-form

❖ Click “Save” in the tool bar followed by “Refresh”

❖ For a crewmember currently not onboard/available resource:

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s current availability-date (port) from the “Schedule Headers”

❖ Click in a position-slot which represents the crewmember’s function – this will populate the available resources in the “Available Resources”-box

❖ Locate the crewmember in the “Standard Availability”- or “On Leave”-tab and click on the record to select it

❖ Click on the “Change Availability Date”-button to populate the “Availability Date Editor”-form

❖ Change the “AvaDate” to the new availability-date by clicking on the drop-down menu and selecting the new date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Click the “Save”-button to save the new availability-date and click “Close” to close the editor-form

❖ Click “Save” in the tool bar followed by “Refresh”

Repatriation in a port which is not a pre-defined manning-port

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the “Find Resource”-field and press “Enter” to execute the search

❖ Click the “Other Reasons”-button to populate the “Other Sign-Off Schedule”-form

❖ Enter the new repatriation-date by clicking on the drop-down menu “Date” and select the new sign-off date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Select the repatriation-reason from the drop-down menu “Reason”

❖ Click the “Save”-button to confirm the changes made

❖ The following message will be prompted “No schedule header exists for the input date! The application found this port of call description in the ship’s itinerary “<port as per ship’s itinerary shows.>”. If you continue, the application will create a schedule header for this date and port. Do you want to continue?” – click “Yes” to confirm the creation of the manual schedule header and to proceed, click “No” to cancel the process, so a different sign-off date can be selected

❖ Click “Save” in the tool bar followed by “Refresh”

❖ The newly created schedule-header now appears in the “Schedule Headers” listing

❖ The crewmember’s record will now display in the Tabular with the revised repatriation-date - when selecting the date of the repatriation in the schedule header list, the record will also be displayed in the “Scheduled Repatriations”-box

Contract-extension

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the “Find Resource”-field and press “Enter” to execute the search

❖ Click on the “Contract Extension”-button to populate the contract extension-form

❖ Select the crewmember’s new repatriation-date (port) from the “Schedule Headers”-listing

❖ Click the “Save”-button to save the new sign-off date

❖ The system will prompt the following message “Do you want to schedule a disembarkation on the selected date?”, click “Yes” to confirm the change and to proceed, click “No” to cancel the process

❖ Click the “Save”-button and click “Close” to close the editor-form

❖ Click “Save” in the tool bar followed by “Refresh”

❖ The crewmember’s record will now display in the Tabular with the revised repatriation-date - when selecting the date of the repatriation in the schedule header list, the record will also be displayed in the “Scheduled Repatriations”-box

View available resources for a position

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the appropriate date/port from the “Schedule Headers”

❖ Click in a position-slot which represents the function you would like to show the available resources for – the available resources will appear in the “Available Resources”-box

❖ The user can choose between the “Standard Availability”-, the “From Equivalent Position”-, the “From Career Path”- and from the “On Leave”-tab

Please note that whereas the above described process is the quickest way to populate the available resources, however, opposed to the Gantt-Scheduler, the Tabular-Scheduler’s “Available Resources”-box is based on the logic of finding a replacement for a repatriating crewmember, hence the automatic refresh of the resources will revert back to the default of the “Scheduled Repatriations”-box, i.e. refreshing to the crewmember’s position which had last been selected in the “Scheduled Repatriations”-box.

Therefore, the correct way of populating the available resources without negative impact from the auto-refresh is that the user selects a different schedule-header (date/port) in the “Schedule Headers”-listing AND a scheduled repatriation in the “Scheduled Repatriations”-box.

Scheduling a replacement/resource for a repatriating crewmember

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the “Find Resource”-field and press “Enter” to execute the search

❖ Verify the crewmember’s repatriation-date and select this date (port) from the “Schedule Headers” - the crewmember’s record will now be displayed in the “Scheduled Repatriations”-box

❖ Click on the crewmember’s record in the “Scheduled Repatriations”-box - this will populate the available resources in the “Available Resources”-box

❖ Locate the replacement crewmember in the “Standard Availability”-, the “From Equivalent Position”-, the “From Career Path”- and from the “On Leave”-tab and click on the record to select it

❖ Drag and drop the replacement-record into the “Scheduled Embarkations”-box

❖ ⚠ The system automatically calculates and schedules the crewmember’s contract end-date based on the contract-length defined at position-, respectively contract-level. Only if the contract-length is not pre-defined, will the system prompt a message to select the crewmember’s end of contract-date before the scheduling can be finalized and reflected in the Gantt-chart.

❖ Click “Save” in the tool bar followed by “Refresh”

❖ The crewmember will now display in the Tabular-view in the “Scheduled Embarkations”-box

Scheduling an overlap

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the "Find Resource"-field and press "Enter" to execute the search

❖ Select the replacement-crewmember's embarkation-date (port) from the "Schedule Headers" on the right

❖ This will populate the available resources in the "Available Resources"-box

❖ Locate the replacement crewmember in the "Standard Availability"-, the "From Equivalent Position"-, the "From Career Path"- and from the "On Leave"-tab and click on the record to select it

❖ Drag and drop the replacement-record into the "Scheduled Embarkations"-box

❖ The system automatically calculates and schedules the crewmember's contract end-date based on the contract-length defined at position-, respectively contract-level. Only if the contract-length is not pre-defined, will the system prompt a message to select the crewmember's end of contract-date before the scheduling can be finalized and reflected in the Gantt-chart.

❖ The system will prompt an informational message regarding the length of overlap – click "OK" to proceed

❖ Click "Save" in the tool bar followed by "Refresh"

❖ The crewmember will now display in the Tabular-view in the "Scheduled Embarkations"-box

Scheduling a position-change

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Tabular Scheduler" to populate the "Tabular Scheduler"-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the "Find Resource"-field and press "Enter" to execute the search

❖ Click the "Change of Position"-button to populate the "Change of Position"-form

❖ Select the department the new position belongs to from the drop-down menu "Department"

❖ Click on the “Set CBA Type”-type button to modify the CBA-type, if applicable

❖ Select the new position from the drop-down menu “New Position”

❖ Enter the effective-date for the position-change by clicking on the drop-down menu “Date” and select the effective-date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Enter any comments/notes into the “Notes”-field, if necessary

❖ Select the target position-slot the crewmember will be occupying after the position-change by clicking into the respective slot

❖ Click the “Save”-button to save the scheduled position-change

❖ If the contract-configuration does not contain the wage-configuration for the crewmember’s new position, the system will prompt the following reminder-message “No wages found in the configuration, proceed to do so manually.”, click “OK” to proceed

❖ Click “Save” in the tool bar followed by “Refresh”

❖ The crewmember’s modified schedule including the future position-change will now reflect in the Tabular-view – the function-change will also be displayed accordingly in the “Scheduled Repatriations”- (old position) and “Scheduled Embarkations”-box (new position) for the date that the position-change comes into effect

Scheduling a ship-transfer

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the “Find Resource”-field and press “Enter” to execute the search

❖ Click on the “Change of Ship”-button to populate the “Change of Ship”-form

❖ Select the repatriation-date from the list of schedule-headers displayed under “Source Ship Headers”

❖ Select the target-ship from the drop-down menu “Target Ship”

❖ Enter the boarding-date for the target-ship by clicking on the drop-down menu “Date” and select the date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field or select the date in the “Target Ship Headers” by clicking on the appropriate date)

❖ Enter any comments/notes into the “Notes”-field, if necessary

❖ Select the position-slot the crewmember will be occupying after the ship-change on the target-ship by clicking into the respective slot

❖ Click the “Save”-button to save the modifications made

❖ The system will prompt the following message “Proceed to create any cost distribution for the target ship segment”, click “OK” to proceed

❖ If applicable and a cost-center needs to be associated with the ship-transfer, click on the “Add Cost-center”-button to create a new entry-line in the cost-center-box

❖ Select the appropriate cost-center from the drop-down menu “Cost Center” and enter the date-range it should be applied to in the fields “From” and “Until”

❖ Click the “Save”-button in the “Cost Center”-box to confirm the cost-center addition

❖ Click “Save” in the tool bar followed by “Refresh”

Change of position-slot

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the “Find Resource in Position Slots”-field and press “Enter” to execute the search

Modify a crewmember’s repatriation-reason

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the "Find Resource"-field and press "Enter" to execute the search

❖ Select the crewmember's repatriation-date (port) from the "Schedule Headers" on the right - the record will now be displayed in the "Scheduled Repatriations"-box

❖ Double-click on the crew-record to open the "Scheduler Details Editor"-form

❖ Select the new repatriation-reason from the drop-down menu "Event/Reason"

❖ Click the "Save"-button to save the modification and click "Close" to close the editor-form

❖ Click "Save" in the tool bar followed by "Refresh"

Add/Edit/Delete a cost-center for an assignment of a scheduled embarkation

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Tabular Scheduler" to populate the "Tabular Scheduler"-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember's embarkation-date (port) from the "Schedule Headers" - the record will now be displayed in the "Scheduled Embarkations"-box

❖ Select the crewmember's record by clicking on it

❖ Select the "Cost Center Variations Schedule"-tab

❖ To add a new cost-center: Click on the "Add Cost-center"-button to create a new entry-line in the cost-center-box

❖ Select the appropriate cost-center from the drop-down menu "Cost Center" and enter the date-range it should be applied to in the fields "From" and "Until"

❖ Click the "Save Event"-button to confirm the cost-center addition

❖ Click "Save" in the tool bar followed by "Refresh"

❖ Click on the "Sign-On Schedule"-tab to return to the standard view

❖ To modify an existing cost-center: Select the record to be modified by clicking on it

❖ Click on the “Edit Cost-center”-button and modify the cost-center record as needed

❖ Click the “Save Event”-button to confirm the changes made

❖ Click “Save” in the tool bar followed by “Refresh”

❖ Click on the “Sign-On Schedule”-tab to return to the standard view

❖ To delete an existing cost-center: Select the record to be deleted by clicking on it

❖ Click on the “Delete Cost-center”-button

❖ The system will prompt the following message “Do you want to delete the selected record?”, click “Yes” to confirm the deletion, click “No” to cancel the deletion-process

❖ Click “Save” in the tool bar followed by “Refresh”

❖ Click on the “Sign-On Schedule”-tab to return to the standard view

Add/Edit/Delete salary-information for a scheduled embarkation

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s embarkation-date (port) from the “Schedule Headers” - the record will now be displayed in the “Scheduled Embarkations”-box

❖ Select the crewmember’s record by clicking on it

❖ Click on the “View Edit Individual Contract”-icon (money-stack) to open the “Standard Contract and Wages”-editor

❖ To add a new contract standard wage: Click on the “Scheduled Wages”-button to populate a new blank entry-form

❖ Depending on the crewmember’s record, the system might prompt the following message “No valid payroll currency found for selected resource. The application will apply the default currency. Proceed to select it manually if needed.”, click “OK” to proceed

❖ Enter the currency, unit of measure, effective-date, wage rate start (amount), vacation percentage etc. into the appropriate fields as applicable

❖ Click the “Save”-button to save the addition

❖ The system will prompt the following message “Wage schedule saved”, click “OK” to proceed

❖ Click the “Close”-button to close the form

❖ Click “Save” in the tool bar followed by “Refresh”

❖ To modify an existing contract standard wage: Select the wage-form to be modified and click on the “Edit”-button – this enable the existing form for modifications

❖ Make all appropriate modification, once completed, click the “Save”-button to confirm the changes

❖ The system will prompt the following message “Wage schedule saved”, click “OK” to proceed

❖ Click the “Close”-button to close the form

❖ Click “Save” in the tool bar followed by “Refresh”

❖ To delete an existing contract standard wage: Select the wage-form to be deleted and click on the “Delete Scheduled Wages”-button – this enable the existing form for modifications

❖ The system will prompt the following message “Do you want to delete selected wage schedule?”, click “Yes” to confirm the deletion, click “No” to cancel the deletion-process

❖ Click the “Close”-button to close the form

❖ Click “Save” in the tool bar followed by “Refresh”

Rectify (delete) incorrect scheduling

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s embarkation-date (port) from the “Schedule Headers” - the record will now be displayed in the “Scheduled Embarkations”-box

❖ Select the crewmember’s record by clicking on it

❖ Click on the “Delete”-button in the tool bar

❖ The system will prompt the following message “Do you want to delete this row?”, click “Yes” to confirm the deletion, click “No” to cancel the deletion-process

❖ The crewmember will disappear from the “Scheduled Embarkations”-box

❖ Click “Save” in the tool bar followed by “Refresh”

View a crewmember’s biographic-, contract history- and relations-details

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the “Find Resource”-field and press “Enter” to execute the search

❖ Double-click the checkmark showing in the crewmember’s position-slot – this will populate the “Position Slot Details”-form

❖ Click the close-window symbol “X” to close the form – this will trigger the “Crewmember Details”-form (read only) which displays all biographic- and contract history-details in the “Bio Data and Assignments History”-tab and any relationships set up for this crewmember when selecting the “Relations”-tab

❖ Click the “Close”-button to close the form and to return to the Tabular Scheduler view

View an embarking crewmember’s licenses and certifications

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s embarkation-date (port) from the “Schedule Headers” - the record will now be displayed in the “Scheduled Embarkations”-box

❖ Select the crewmember’s record by clicking on it

❖ Click on the “Licenses and Certifications Audit”-icon to populate the audit-form which lists the crewmember’s licenses and certifications

❖ Click the close-window symbol “X” to close the form

View an embarking/disembarking crewmember’s travel request history

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s repatriation-/embarkation-date (port) from the “Schedule Headers” - the record will now be displayed in the “Scheduled Repatriations”/”Scheduled Embarkations”-box

❖ Select the crewmember’s record by clicking on it

❖ Click on the “Travel Request History”-icon to populate the “Travel Requests”-form (read only)

❖ Click the close-window symbol “X” to close the form

View an embarking/disembarking crewmember’s travel itinerary

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Tabular Scheduler” to populate the “Tabular Scheduler”-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s repatriation-/embarkation-date (port) from the “Schedule Headers” - the record will now be displayed in the “Scheduled Repatriations”/”Scheduled Embarkations”-box

❖ Select the crewmember’s record by clicking on it

❖ Click on the “Travel Itinerary”-icon to populate the “Travel Itinerary”-form (read only)

❖ Click the close-window symbol “X” to close the form

View an embarking/disembarking crewmember's hotel request

Hotel-requests will be handled by the Air/Sea-department via "Travel Management"

Request a transfer for an embarking/disembarking crewmember

Transfer-requests will be handled by the Air/Sea-department via "Travel Management"

View an embarking/disembarking crewmember's contact-details

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Tabular Scheduler" to populate the "Tabular Scheduler"-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember's repatriation-/embarkation-date (port) from the "Schedule Headers" - the record will now be displayed in the "Scheduled Repatriations"/"Scheduled Embarkations"-box

❖ Select the crewmember's record by clicking on it

❖ Click on the "Person's Contact Mechanism"-icon to populate the "Contact Mechanism"-form (read-only)

❖ Select the different contact-type by clicking on the record to display the applicable contact-information

❖ Click the close-window symbol "X" to close the form

❖ The same functionality is also available in the "Available Resources"/box

Add/Delete a position-slot

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Tabular Scheduler" to populate the "Tabular Scheduler"-screen

❖ Select the ship, date-range, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ To add a new positions-lot: Click on the appropriate position-slot header which represents the position that requires an additional slot to be created

❖ Click the “Add Position Slot”-button to populate the “Create Position Slot”-form

❖ Select the department, position, ship and type of TOP from the respective drop-down menus in the form

❖ Enter the validity by clicking on the drop-down menu “Valid From” and “Valid Until” and select the new sign-off date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the fields)

❖ Click the “Save”-button to confirm the addition

❖ Click “Save” in the tool bar followed by “Refresh”

❖ The newly created position-slot will now appear in the Tabular Scheduler overview and is ready to be used for scheduling current/future assignments

❖ Position-slot which have been created in addition to the standard TOP head-counts can be easily identified as they are highlighted in yellow.

❖ To delete an existing positions-lot: Click on the appropriate position-slot which is to be deleted

❖ Click the “Delete Position Slot”-button

❖ The system will prompt the following message “Position slot deleted, the deletion will not show unless the data is refreshed!”, click “OK” to proceed

❖ Click “Save” in the tool bar followed by “Refresh”

❖ The deleted position-slot will no longer appear in the Tabular Scheduler overview

Section V: Gantt Scheduler

This section will cover:

- ☐ Overview Gantt-Scheduler
- ☐ Gantt-views
- Standard view
- View by Position Across the Fleet
- View by Person Across the Fleet
- ☐ Selection criteria
- ☐ Schedule Headers
- ☐ Scheduled repatriations-, scheduled embarkations- and available resources-box
- ☐ Business-Scenarios
- Early repatriation – end of contract
- Early repatriation – compassionate leave with return after short leave (no replacement for interim period)
- Early repatriation – medical leave (recovery for next assignment)
- Adjusting a crewmember's availability-date
- Repatriation in a port which is not a pre-defined manning-port
- Contract-extension
- View available resources for a position
- Scheduling a replacement/resource for a repatriating crewmember
- Scheduling an overlap
- Scheduling a position-change
- Scheduling a ship-transfer
- Change of position-slot
- Scheduling a not-onboard assignment

- Modify a crewmember’s repatriation-reason
- Add/Edit/Delete a cost-center for an assignment of a scheduled embarkation
- Add/Edit/Delete salary-information for a scheduled embarkation
- Rectify (delete) incorrect scheduling
- View a crewmember’s biographic-, contract history- and relations-details
- View an embarking crewmember’s licenses and certifications
- View an embarking/disembarking crewmember’s travel request history
- View an embarking/disembarking crewmember’s travel itinerary
- View an embarking/disembarking crewmember’s hotel request
- View an embarking/disembarking crewmember’s transfer request
- View an embarking/disembarking crewmember’s contact-details
- Add/Delete a position-slot

Overview Gantt-Scheduler

The Gantt-Scheduler is the second of three scheduling-tools within CMS. Whereas the Tabular-Scheduler provides a linear display of the crew-schedules, the Gantt-Scheduler illustrates the schedules in (horizontal) bar-charts for a better visual overview of the interaction and dependency of current and future schedules, including their start- and end-dates.

In this fashion, any possible schedule-gap and/or –vacancies can easily be identified.

Similar like the Tabular-Scheduler, the user can utilize the various selection-filters to customize which schedule-information is displayed.

Gantt-views

Standard view

The Standard view of the Gantt is the default screen of this scheduling-functionality. It offers the user various selection-filters to customize which schedule-information is displayed via the Gantt-chart.

View by Position Across the Fleet

The view by position across the fleet will provide the user an overview of schedules by positions not for one single ship, but rather for one or multiple positions on ALL ships within the fleet.

This screen is especially handy for incidents when the scheduling is driven by positions, when determining the gaps/vacancies for one position and/or whenever various ship-transfers occur and need to be reviewed.

❖ In order to switch from the Standard View to the View by Position Across the Fleet, ensure that the correct position is select in the position-filter, then click the "View by Position Across the Fleet"-button and the Gantt-view will change accordingly

❖ In order to switch back to the Standard View, click on the button "Standard View"

View by Person Across the Fleet

The view by person across the fleet will provide the user an overview of schedules for a specific person.

This screen is especially handy for crewmembers who in their line of duty have multiple ship-transfers or in case you want to have a visual overview of one crewmember's schedule over a longer period of time.

This screen is also the only view which would show any Not-onboard-assignments in a graphic fashion, all other Gantt-views are set up to hide Not-onboard-assignments in order to avoid them being mistaken for a valid replacement/resource.

❖ In order to switch from the Standard View to the View by Person Across the Fleet, click the "View by Person Across the Fleet"-button and the Gantt-view will change accordingly

❖ Enter the crew-ID into the “Person ID”-field and press “Enter” to display the crewmember’s schedules across the fleet

❖ In case the crew-ID is unknown, click the “People”-button located next to the “Person ID”-field – this will launch the People Lookup-form which will allow to search for the crewmember using various search-criteria

❖ Enter the crew-ID into the “Person ID”-field and press “Enter” to display the crewmember’s schedules across the fleet

❖ In order to switch back to the Standard View, click on the button “Standard View”

Selection criteria

The Gantt Scheduler has 3 main selection criteria which determine the information populated in the chart: Ship, Departments and Positions

❖ In order to select the ship to be displayed, click on the drop-down “Ship”

❖ The record “NAP” is not an actually ship, but stands for “Not Applicable”. The user can only select one ship at the time from the drop-down menu – if an overview of two or more ships is needed, the “Position Across the Fleet”-view should be used instead!

❖ Selecting the ship from the drop-down will automatically trigger the schedule-header on the right to update according to the ship’s itinerary

❖ In order to select the department(s) to be displayed, click on the drop-down “Departments”

❖ Clicking once on “(Show All)” will select all departments at the same time, clicking on the same record for a second time will de-select all departments. The selections “ALL DEPARTMENTS” and “NOT APPLICABLE” should not be used!.

❖ In order to select the position(s) to be displayed, click on the drop-down “Positions”

❖ The drop-down for positions will only populate if the department(s) has been selected beforehand! Chosing the department will function as a filter, if only one particular department has been chosen, the drop-down “Positions” will only list the positions that pertain to this previously selected department.

❖ Clicking once on “(Show All)” will select all postions at the same time, clicking on the same record for a second time will de-select all positions.

Schedule Headers

The Schedule Headers are an important component of the scheduling-tool as they not only represent the ship’s itinerary, respectively the authorized manning-ports, but they also impact the “Scheduled Repatriations”-, “Scheduled Embarkations”- and “Available Resources”-boxes.

The majority of the schedule headers are created automatically by the system based on the itinerary received from MXP and the setup of authorized manning ports in FC Administration. The user has also the possibility to manually create additional schedule-headers as needed, however, this should rather be on an exception-basis.

The “Date”-field shows the date the ship calls in the respective port, the “Description”-field lists the name of the port or the description chosen when manually creating a schedule-header

❖ The description “Migrated from SGP” indicates that this schedule-header was created in the process of the data-migration from SGP to CMS. Generally speaking, these schedule-headers had to be created as SGP-assignments existed for non-authorized ports or for incorrect dates (sea-days) and as otherwise a migration of these schedules would have not been possible

❖ In order to see more detailed information pertaining to each schedule-header, select the record from the listing and click on the arrows to expand the Manning Header-box

❖ In order to see more detailed itinerary-information pertaining to each date/port, select the record from the listing and click on the arrows to expand the Itinerary-box

❖ The system uses different colors to further define differences between the schedule-headers:

- No color: Standard schedule-header for call in an authorized manning-port
- Dark blue: Schedule-header select by the user
- Light blue: Schedule-header for a manning-port which is associated with a travel-block (block-date)

- Light green: Schedule-header for a turn-around port
- Red: Schedule-header which has been created manually for a non-authorized port or sea-day (Emergency-/Non-planner Schedule Header)
- Gray: Schedule-header for a manning-port which has been deleted from the itinerary by MXP, but which still has crew-movements associated to it and need to be re-scheduled due to the itinerary-change

❖ To create a new schedule-header (manually): Select any schedule-header to place the focus into the "Schedule Headers"-listing

❖ Click on the "Add"-button in the tool-bar to populate the "Scheduling Header Editor"

❖ Enter the schedule-header's reference and description in the respective free-text fields

❖ Select the appropriate date/port from the "List of Manning Ports"

❖ Click on the "Save"-button to save the addition

❖ Click on the "Save"-button in the tool bar followed by "Refresh"

❖ ⚠ If a new schedule-header needs to be created for a date/port currently not listed in the "List of Manning Ports" within the editor-form, the user first needs to create an entry for this date/port in Scheduling/Manning Ports Management/Manning Ports List before it becomes available as a selection in the editor-form! (Refer to section VII Manning Ports Managemnet for a detailed description)

❖ To modify an existing schedule-header: Select the schedule-header to be modified by clicking on it

❖ Click on the "Edit"-button in the tool-bar to populate the "Scheduling Header Editor"

❖ Modify the schedule-header as needed and click the "Save"-button

❖ Click the "Close"-button to close the editor-form

❖ ⚠ In the "Scheduler Header Editor" the fields "Reference" and "Description" are free-text-fields and can be overwritten as needed. The fields "Manning Date" and "Port" can only be modified by selecting a different record in the "List of Manning Ports". Modifications to the fields Type" and "Status" can only be made by selecting a different option from the respective drop-down menus. No modifications should be made to the field "Ship" in this form!

❖ To delete an existing schedule-header: Select the schedule-header to be deleted by clicking on it

❖ Click on the "Delete"-button in the tool-bar

❖ The schedule-header will instantly be deleted, unless there are still crew-movements (scheduled embarkations/repatriations) associated with this schedule-header

❖ If there are schedules associated to the schedule-header, the system will prompt the following message "There are scheduled resources for this list. Note that if confirmed, you will delete other resources linked to the selected header that you may not be able to see. Do you want to continue?", click "Yes" to delete the schedule-header and any linked schedules, click "No" to cancel the deletion-process

Scheduled repatriations-, scheduled embarkations- and available resources-box

Scheduled Repatriations-box

The "Scheduled Repatriation"-box will display all crewmember scheduled to disembark on a specific date.

The information displayed is updated as the user selects a different schedule-header (date/port) in the "Schedule Headers"-listing.

The filters department and positions also impact the information displayed, e.g. if the department "Administration" and all positions are set as criteria, the "Scheduled Repatriations"-box will only display any disembarking crewmembers who belong to the Administration-department!

The selection of a position-slot within the Gantt-view will not impact the display of the scheduled repatriations.

The "Scheduled Repatriations"-box contains two tabs: the "Sign-Off Schedule"- and the "Sign-Off Replacement Schedule Progress"-tab. Whereas the first mentioned allows a detailed overview of the crewmembers scheduled to repatriate and to modify their records, the second tab only shows a graphic overview of the scheduled repatriations.

Within the "Scheduled Repatriations"-box, the user has the possibility to retrieve the crewmember's contact-details, licenses and certifications and information regarding travel-arrangements via different functionality-buttons. In addition, an export-functionality is available to create a list of all scheduled repatriations.

Scheduled Embarkations-box

The "Scheduled Embarkations"-box will display all crewmember scheduled to embark on a specific date.

The information displayed is updated as the user selects a different schedule-header (date/port) in the "Schedule Headers"-listing.

The filters department and positions also impact the information displayed, e.g. if the department "Administration" and all positions are set as criteria, the "Scheduled Embarkations"-box will only display any embarking crewmembers who belong to the Administration-department!

The selection of a position-slot within the Gantt-view will not impact the display of the scheduled embarkations.

The "Scheduled Embarkations"-box contains two tabs: the "Sign-On Schedule"- and the "Cost Center Variations Schedule"-tab. Whereas the first mentioned allows a detailed overview of the crewmembers scheduled to embark and to modify their records, the second tab allows the user to add/edit/delete cost-centers that might need to be tied to a scheduled embarkation/assignment.

Within the "Scheduled Embarkations"-box, the user has the possibility to retrieve the crewmember's contact-details, licenses and certifications, information regarding travel-arrangements and manage scheduled standard wage via different functionality-buttons. In addition, an export-functionality is available to create a list of all scheduled embarkations.

Available Resources-box

The "Available Resources"-box will display all crewmembers who are available as a replacement/resource for a specific date/date-range.

The information is populated as the user selects a different schedule-header (date/port) in the "Schedule Headers"-listing AND a position-slot in the "Positions Slots"-listing.

Crewmembers who have a future schedule will also appear in the different tabs of the "Available Resources"-box, but they will appear as highlighted records in gray and will also have the start-date of the scheduled assignment listed in the "Scheduled"-column. Since a crewmember can have multiple future assignments in the future and multiple different availability-dates based on his future schedules, records might appear multiple times as an available resource.

The "Available Resources"-box contains four different tabs: the "Standard Availability"-, the "From Equivalent Positions"-, the "From Career"- and the "On Leave"-tab. Each tab follows a different logic to determine the pool of crewmembers available:

❖ Standard Availability: The "Standard Availability"-tab will list any crewmembers who have reached their availability-date at the date selected in the schedule-header, respectively within the 15-day-range of the date selected, e.g. if the date selected in the schedule-header is 10/09/10, the date-range for the standard-availability is 09/25 to 10/24 and any crewmember (who is holding the position selected) with an availability-date within this date-range would show

❖ From Equivalent Positions: The "From Equivalent Positions"-tab will list any crewmembers who are holding a position which has been set up as an equivalent position to the position queried and who have an availability-date within the date-range selected

Selecting a crewmember from this tab as a resource will actually perform a change of position during the drag-&-drop-process!

❖ From Career: The "From Equivalent Positions"-tab will list any crewmembers who have been placed on the promotion-list for position queried and the effective-date (see "Effective Date" in People/Preferences & Career Path/Career Path) for this possible promotion is within the date-range selected.

Selecting a crewmember from this tab as a resource will actually perform a change of position during the drag-&-drop-process!

❖ On Leave: The "On Leave"-tab will list any crewmembers who are currently in a status "Active/On Vacation"

The system does currently not perform any calculation for a future "Active/On Vacation"-status!

Within the "Available Resources"-box, the user has not only the possibility to select a crewmember as a replacement for a repatriating crewmember, but the user can also retrieve the crewmember's contact-details, information regarding preferences and modify the availability-date via different functionality-buttons. In addition, an export-functionality is available to create a list of all available resources.

Business-Scenarios

Whereas the below scenarios mainly describe business-scenarios performed for crewmembers currently onboard, please note that the following scenarios can also be performed in the Gantt for crewmembers with future schedules:

-Change of sign-on/sign-off date

- Change of repatriation-reason

- Change of position

- Change of ship

- Change position-slot

- Scheduling a NOB-schedule

The various options for these functionalities are shown when right-mouse clicking on the crewmember's future schedule in the Gantt-chart

Early repatriation – end of contract

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Gantt Scheduler" to populate the "Gantt Scheduler"-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember's new repatriation-date (port) from the "Schedule Headers" on the right

❖ Search the crewmember by entering either the crew-ID or the name/partial name into the "Find Resource in Position Slots"-field and press "Enter" to execute the search

❖ Right-mouse click on the crewmember's record in the Gantt-bar and select "Early Sign-Off"

❖ Click the "Override Availability Date"-button and enter the appropriate new availability-date, if applicable.

❖ The crewmember’s availability-date will only have to be set manually if it should differ from the parameters defined in the contract-definitions (in case of a shorter/longer vacation).

❖ Click “Save” in the tool bar to save the modifications made to the schedule

❖ Click “Refresh” in the tool bar to update the Gantt-view with the changed schedule-information

❖ The crewmember’s record will now display in the Gantt with the revised repatriation-date

❖ When selecting the date of the repatriation in the schedule header list, the crewmember’s record will also be displayed in the “Scheduled Repatriations”-box

Early repatriation – compassionate leave with return after short leave (no replacement for interim period)

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Gantt Scheduler” to populate the “Gantt Scheduler”-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s new repatriation-date (port) from the “Schedule Headers” on the right

❖ Search the crewmember by entering either the crew-ID or the name/partial name into the “Find Resource in Position Slots”-field and press “Enter” to execute the search

❖ Right-mouse click on the crewmember’s record in the Gantt-bar and select “Early Repat”

❖ Select the repatriation-reason “Compassionate” from the drop-down menu “Reason”

❖ Click the “Override Availability Date”-button and enter the appropriate the new availability-date (earliest return-date from compassionate-leave)

❖ Click “Save” in the tool bar

❖ Click “Refresh” in the tool bar to update the Gantt-view with the changed schedule-information

❖ The crewmember's record will now display in the Gantt with the revised repatriation-date

❖ When selecting the date of the repatriation in the schedule header list, the crewmember's record will also be displayed in the "Scheduled Repatriations"-box

❖ In order to schedule the crewmember's return from the compassionate leave, select the manning-header for the earliest return-date

❖ Go to the crewmember's position-slot of the current assignment (search via "Find Resource in Position Slots"-field)

❖ Selecting the position-slot and the schedule-header will trigger the available resources to populate in the "Available Resources"-box

❖ Select the crewmember in the "Available Resources"-box by clicking on the record and drag & drop it from the "Available Resources"-box into the position-slot of the current assignment

❖ Depending on the last event of the crewmember's record, you might be prompted the below message, click "OK" to close the window and to continue

❖ If no replacement has been scheduled for the interim-period of the compassionate leave, the following informational message will appear, click "OK" to proceed

❖ Click "Save" in the tool bar

❖ Click "Refresh" in the tool bar to update the Gantt-view with the new schedule-information

❖ The crewmember's new schedule will now display in the Gantt

❖ When selecting the date of the embarkation in the schedule header list, the crewmember's record will also be displayed in the "Scheduled Embarkations"-box

Early repatriation – medical leave (recovery for next assignment)

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Gantt Scheduler" to populate the "Gantt Scheduler"-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember's new repatriation-date (port) from the "Schedule Headers" on the right

❖ Search the crewmember by entering either the crew-ID or name/partial name into the "Find Resource in Position Slots"-field and press "Enter" to execute the search

❖ Right-mouse click on the crewmember's record in the Gantt-bar and select "Early Repat"

❖ Select the repatriation-reason "Medical" from the drop-down menu "Reason"

❖ Click "Save" in the tool bar

❖ Click "Refresh" in the tool bar to update the Gantt-view with the changed schedule-information

❖ The crewmember's record will now display in the Gantt with the revised repatriation-date

❖ When selecting the date of the repatriation in the schedule header list, the crewmember's record will also be displayed in the "Scheduled Repatriations"-box

❖ Selecting the sign-off reason "Medical" will automatically place the crewmember into the status "Suspended" and the crewmember will NOT show as an available resource until he/she has manually been recovered and placed into an "Active/Available"-status. To recover and to change a crewmember's status, go to People/People Management/Contract – Assignment – Events and add a new event (please refer to **Section IV People** for more detailed instructions)

Adjusting a crewmember's availability-date

❖ For a crewmember currently onboard/scheduled for repatriation:

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Gantt Scheduler" to populate the "Gantt Scheduler"-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the "Find Resource in Position Slots"-field and press "Enter" to execute the search

❖ Select the crewmember's repatriation-date (port) from the "Schedule Headers" on the right - the record will now be displayed in the "Scheduled Repatriations"-box

❖ Double-click on the crew-record to open the “Scheduler Details Editor”-form

❖ Change the “Scheduled Available Date” to the new availability-date by clicking on the drop-down menu and selecting the new date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Click the “Save”-button to save the new availability-date and click “Close” to close the editor-form

❖ Click “Save” in the tool bar followed by “Refresh”

❖ For a crewmember currently not onboard/scheduled for embarkation:

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Gantt Scheduler” to populate the “Gantt Scheduler”-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s embarkation-date (port) from the “Schedule Headers” on the right - the record will now be displayed in the “Scheduled Embarkations”-box

❖ Double-click on the crew-record to open the “Scheduler Details Editor”-form

❖ Change the “Scheduled Available Date” to the new availability-date by clicking on the drop-down menu and selecting the new date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Click the “Save”-button to save the new availability-date and click “Close” to close the editor-form

❖ Click “Save” in the tool bar followed by “Refresh”

❖ For a crewmember currently not onboard/available resource:

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Gantt Scheduler” to populate the “Gantt Scheduler”-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s current availability-date (port) from the “Schedule Headers” on the right

❖ Click in a position-slot which represents the crewmember’s function – this will populate the available resources in the “Available Resources”-box

❖ Locate the crewmember in the “Standard Availability”- or “On Leave”-tab and click on the record to select it

❖ Click on the “Change Availability Date”-button to populate the “Availability Date Editor”-form

❖ Change the “AvaDate” to the new availability-date by clicking on the drop-down menu and selecting the new date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Click the “Save”-button to save the new availability-date and click “Close” to close the editor-form

❖ Click “Save” in the tool bar followed by “Refresh”

Repatriation in a port which is not a pre-defined manning-port

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Gantt Scheduler” to populate the “Gantt Scheduler”-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the “Find Resource in Position Slots”-field and press “Enter” to execute the search

❖ Right-mouse click on the crewmember’s record in the Gantt-bar and select “Early Repat”

❖ Enter the new repatriation-date by clicking on the drop-down menu “Date” and select the new sign-off date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Select the repatriation-reason from the drop-down menu “Reason”

❖ Click “Save” in the tool bar

❖ The following message will be prompted “No schedule header exists for the input date! The application found this port of call description in the ship’s itinerary “<port as per ship’s itinerary shows.>”. If you continue, the application will create a schedule header for this date and port. Do you want to continue?” – click “Yes” to confirm the creation of the manual schedule header and to proceed, click “No” to cancel the process, so a different sign-off date can be selected

❖ Click “Save” in the tool bar

❖ Click “Refresh” in the tool bar to update the Gantt-view with the changed schedule-information and the newly created schedule-header in the “Schedule Headers” listing

❖ The crewmember’s record will now display in the Gantt with the revised repatriation-date - when selecting the date of the repatriation in the schedule header list, the record will also be displayed in the “Scheduled Repatriations”-box

Contract-extension

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Gantt Scheduler” to populate the “Gantt Scheduler”-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the “Find Resource in Position Slots”-field and press “Enter” to execute the search

❖ Click on the “Contr Extension”-button to populate the contract extension-form

❖ Select the crewmember’s new repatriation-date (port) from the “Schedule Headers”-listing

❖ Click the “Save”-button to save the new sign-off date

❖ The system will prompt the following message “Do you want to schedule a disembarkation on the selected date?”, click “Yes” to confirm the change and to proceed, click “No” to cancel the process

❖ Click the “Save”-button and click “Close” to close the editor-form

❖ Click “Save” in the tool bar followed by “Refresh”

❖ The crewmember’s record will now display in the Gantt with the revised repatriation-date - when selecting the date of the repatriation in the schedule header list, the record will also be displayed in the “Scheduled Repatriations”-box

View available resources for a position

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Gantt Scheduler" to populate the "Gantt Scheduler"-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the appropriate date/port from the "Schedule Headers" on the right

❖ Click in a position-slot which represents the function you would like to show the available resources for – the available resources will appear in the "Available Resources"-box

❖ The user can choose between the "Standard Availability"-, the "From Equivalent Position"-, the "From Career Path"- and from the "On Leave"-tab

Scheduling a replacement/resource for a repatriating crewmember

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Gantt Scheduler" to populate the "Gantt Scheduler"-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the "Find Resource in Position Slots"-field and press "Enter" to execute the search

❖ Select the crewmember's repatriation-date (port) from the "Schedule Headers" on the right - the record will now be displayed in the "Scheduled Repatriations"-box

❖ This will populate the available resources in the "Available Resources"-box

❖ Locate the replacement crewmember in the "Standard Availability"-, the "From Equivalent Position"-, and the "From Career Path"- and from the "On Leave"-tab and click on the record to select it

❖ Drag and drop the replacement-record into the position-slot currently occupied by the repatriating crewmember

❖ The system automatically calculates and schedules the crewmember's contract end-date based on the contract-length defined at position-, respectively contract-level. Only if the contract-length is not pre-defined, will the system prompt a message to select the crewmember's end of contract-date before the scheduling can be finalized and reflected in the Gantt-chart.

❖ Click "Save" in the tool bar followed by "Refresh"

❖ The crewmember will now display in the Gantt-view and will also show in the "Scheduled Embarkations"-box

Scheduling an overlap

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Gantt Scheduler" to populate the "Gantt Scheduler"-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the "Find Resource in Position Slots"-field and press "Enter" to execute the search

❖ Select the replacement-crewmember's embarkation-date (port) from the "Schedule Headers" on the right

❖ This will populate the available resources in the "Available Resources"-box

❖ Locate the replacement crewmember in the "Standard Availability"-, the "From Equivalent Position"-, the "From Career Path"- and from the "On Leave"-tab and click on the record to select it

❖ Drag and drop the replacement-record into the position-slot currently occupied by the repatriating crewmember

❖ The system automatically calculates and schedules the crewmember's contract end-date based on the contract-length defined at position-, respectively contract-level. Only if the contract-length is not pre-defined, will the system prompt a message to select the crewmember's end of contract-date before the scheduling can be finalized and reflected in the Gantt-chart.

❖ The system will prompt an informational message regarding the length of overlap – click "OK" to proceed

❖ Click "Save" in the tool bar followed by "Refresh"

❖ The crewmember will now display in the Gantt-view and will also show in the "Scheduled Embarkations"-box

Scheduling a position-change

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Gantt Scheduler" to populate the "Gantt Scheduler"-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the "Find Resource in Position Slots"-field and press "Enter" to execute the search

❖ Click on the "Change of Position"-button to populate the "Change of Position"-form

❖ Select the department the new position belongs to from the drop-down menu "Department"

❖ Click on the "Set CBA Type"-type button to modify the CBA-type, if applicable

❖ Select the new position from the drop-down menu "New Position"

❖ Enter the effective-date for the position-change by clicking on the drop-down menu "Date" and select the effective-date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Enter any comments/notes into the "Notes"-field, if necessary

❖ Select the target position-slot the crewmember will be occupying after the position-change by clicking into the respective slot

❖ Click the "Save"-button to save the scheduled position-change

❖ If the contract-configuration does not contain the wage-configuration for the crewmember's new position, the system will prompt the following reminder-message "No wages found in the configuration, proceed to do so manually.", click "OK" to proceed

❖ Click "Save" in the tool bar followed by "Refresh"

❖ The crewmember's modified schedule including the future position-change will now reflect in the Gantt-chart – the function-change will also be displayed accordingly in the "Scheduled Repatriations"- (old position) and "Scheduled Embarkations"-box (new position) for the date that the position-change comes into effect

Scheduling a ship-transfer

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Gantt Scheduler” to populate the “Gantt Scheduler”-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the “Find Resource in Position Slots”-field and press “Enter” to execute the search

❖ Click on the “Change of Ship”-button to populate the “Change of Ship”-form

❖ Select the repatriation-date from the list of schedule-headers displayed under “Source Ship Headers”

❖ Select the target-ship from the drop-down menu “Target Ship”

❖ Enter the boarding-date for the target-ship by clicking on the drop-down menu “Date” and select the date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field or select the date in the “Target Ship Headers” by clicking on the appropriate date)

❖ Enter any comments/notes into the “Notes”-field, if necessary

❖ Select the position-slot the crewmember will be occupying after the ship-change on the target-ship by clicking into the respective slot

❖ Click the “Save”-button to save the modifications made

❖ The system will prompt the following message “Proceed to create any cost distribution for the target ship segment”, click “OK” to proceed

❖ If applicable and a cost-center needs to be associated with the ship-transfer, click on the “Add Cost-center”-button to create a new entry-line in the cost-center-box

❖ Select the appropriate cost-center from the drop-down menu “Cost Center” and enter the date-range it should be applied to in the fields “From” and “Until”

❖ Click the “Save”-button in the “Cost Center”-box to confirm the cost-center addition

❖ Click “Save” in the tool bar followed by “Refresh”

Change of position-slot

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Gantt Scheduler” to populate the “Gantt Scheduler”-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the “Find Resource in Position Slots”-field and press “Enter” to execute the search

❖ Right-mouse click on the crewmember’s record in the Gantt-bar and select “Change Position Slot” to populate the “Change of Position Slot”-form

❖ Select the new position-slot the crewmember will occupy

❖ Click the “Save”-button to confirm the changes made

❖ Click “Save” in the tool bar followed by “Refresh”

❖ The crewmember is now occupying the new position-slot in the Gantt-chart

Scheduling a not-onboard assignment

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Gantt Scheduler” to populate the “Gantt Scheduler”-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the “Find Resource in Position Slots”-field and press “Enter” to execute the search

❖ Click on the “NOB Schedule”-button to populate the “Not onboard transactions scheduling”-form

❖ Enter the assignment-dates by completing the “From”- and “Until”-fields

❖ Click the “Save”-button to confirm the assignment-dates

❖If no schedule-header exists for the assignment-dates, the following message will be prompted “No schedule header exists for the input date! The application found this port of call description in the ship’s itinerary “<port as per ship’s itinerary shows.>”. If you continue, the application will create a schedule header for this date and port. Do you want to continue?” – click “Yes” to confirm the creation of the manual schedule header and to proceed, click “No” to cancel the process

❖ The system will prompt the following message after selecting “Yes”, “Proceed to create any cost distribution for the target ship segment”, click “OK” to proceed

❖ If a cost-center needs to be created, click on the “Add Cost-center”-button to create a new entry-line in the cost-center-box

❖ Select the appropriate cost-center from the drop-down menu “Cost Center” and enter the date-range it should be applied to in the fields “From” and “Until”

❖ Click the “Save”-button in the “Cost Center”-box to confirm the cost-center addition

❖ Click the “Save”-button to confirm

❖ Click “Save” in the tool bar followed by “Refresh”

Modify a crewmember’s repatriation-reason

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Gantt Scheduler” to populate the “Gantt Scheduler”-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the “Find Resource in Position Slots”-field and press “Enter” to execute the search

❖ Select the crewmember’s repatriation-date (port) from the “Schedule Headers” on the right - the record will now be displayed in the “Scheduled Repatriations”-box

❖ Double-click on the crew-record to open the “Scheduler Details Editor”-form

❖ Select the new repatriation-reason from the drop-down menu “Event/Reason”

❖ Click the “Save”-button to save the modification and click “Close” to close the editor-form

❖ Click “Save” in the tool bar followed by “Refresh”

Add/Edit/Delete a cost-center for an assignment of a scheduled embarkation

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Gantt Scheduler" to populate the "Gantt Scheduler"-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember's embarkation-date (port) from the "Schedule Headers" - the record will now be displayed in the "Scheduled Embarkations"-box

❖ Select the crewmember's record by clicking on it

❖ Select the "Cost Center Variations Schedule"-tab

❖ To add a new cost-center: Click on the "Add Cost-center"-button to create a new entry-line in the cost-center-box

❖ Select the appropriate cost-center from the drop-down menu "Cost Center" and enter the date-range it should be applied to in the fields "From" and "Until"

❖ Click the "Save Event"-button to confirm the cost-center addition

❖ Click "Save" in the tool bar followed by "Refresh"

❖ Click on the "Sign-On Schedule"-tab to return to the standard view

❖ To modify an existing cost-center: Select the record to be modified by clicking on it

❖ Click on the "Edit Cost-center"-button and modify the cost-center record as needed

❖ Click the "Save Event"-button to confirm the changes made

❖ Click "Save" in the tool bar followed by "Refresh"

❖ Click on the "Sign-On Schedule"-tab to return to the standard view

❖ To delete an existing cost-center: Select the record to be deleted by clicking on it

❖ Click on the "Delete Cost-center"-button

❖ The system will prompt the following message "Do you want to delete the selected record?", click "Yes" to confirm the deletion, click "No" to cancel the deletion-process

❖ Click "Save" in the tool bar followed by "Refresh"

❖ Click on the "Sign-On Schedule"-tab to return to the standard view

Add/Edit/Delete salary-information for a scheduled embarkation

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Gantt Scheduler” to populate the “Gantt Scheduler”-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s embarkation-date (port) from the “Schedule Headers” - the record will now be displayed in the “Scheduled Embarkations”-box

❖ Select the crewmember’s record by clicking on it

❖ Click on the “View Edit Individual Contract”-icon (money-stack) to open the “Standard Contract and Wages”-editor

❖ To add a new contract standard wage: Click on the “Scheduled Wages”-button to populate a new blank entry-form

❖ Depending on the crewmember’s record, the system might prompt the following message “No valid payroll currency found for selected resource. The application will apply the default currency. Proceed to select it manually if needed.”, click “OK” to proceed

❖ Enter the currency, unit of measure, effective-date, wage rate start (amount), vacation percentage etc. into the appropriate fields as applicable

❖ Click the “Save”-button to save the addition

❖ The system will prompt the following message “Wage schedule saved”, click “OK” to proceed

❖ Click the “Close”-button to close the form

❖ Click “Save” in the tool bar followed by “Refresh”

❖ To modify an existing contract standard wage: Select the wage-form to be modified and click on the “Edit”-button – this enable the existing form for modifications

❖ Make all appropriate modification, once completed, click the “Save”-button to confirm the changes

❖ The system will prompt the following message “Wage schedule saved”, click “OK” to proceed

❖ Click the “Close”-button to close the form

❖ Click "Save" in the tool bar followed by "Refresh"

❖ To delete an existing contract standard wage: Select the wage-form to be deleted and click on the "Delete Scheduled Wages"-button – this enable the existing form for modifications

❖ The system will prompt the following message "Do you want to delete selected wage schedule?", click "Yes" to confirm the deletion, click "No" to cancel the deletion-process

❖ Click the "Close"-button to close the form

❖ Click "Save" in the tool bar followed by "Refresh"

Rectify (delete) incorrect scheduling

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Gantt Scheduler" to populate the "Gantt Scheduler"-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember's embarkation-date (port) from the "Schedule Headers" - the record will now be displayed in the "Scheduled Embarkations"-box

❖ Select the crewmember's record by clicking on it

❖ Click on the "Delete"-button in the tool bar

❖ The system will prompt the following message "Do you want to delete this row?", click "Yes" to confirm the deletion, click "No" to cancel the deletion-process

❖ The crewmember will disappear from the "Scheduled Embarkations"-box

❖ Click "Save" in the tool bar followed by "Refresh"

View a crewmember's biographic-, contract history- and relations-details

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Gantt Scheduler" to populate the "Gantt Scheduler"-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Search the crewmember by entering either the crew-ID or name/partial name into the "Find Resource in Position Slots"-field and press "Enter" to execute the search

❖ Click on the crewmember's record in the Gantt-chart to populate the "Crewmember Details"-form (read only) which displays all biographic- and contract history-details in the "Bio Data and Assignments History"-tab and any relationships set up for this crewmember when selecting the "Relations"-tab

❖ Click the "Close"-button to close the form and to return to the Gantt Scheduler view

View an embarking crewmember's licenses and certifications

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Gantt Scheduler" to populate the "Gantt Scheduler"-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember's embarkation-date (port) from the "Schedule Headers" - the record will now be displayed in the "Scheduled Embarkations"-box

❖ Select the crewmember's record by clicking on it

❖ Click on the "Licenses and Certifications Audit"-icon to populate the audit-form which lists the crewmember's licenses and certifications

❖ Click the close-window symbol "X" to close the form

View an embarking/disembarking crewmember's travel request history

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Gantt Scheduler" to populate the "Gantt Scheduler"-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember's repatriation-/embarkation-date (port) from the "Schedule Headers" - the record will now be displayed in the "Scheduled Repatriations"/"Scheduled Embarkations"-box

❖ Select the crewmember's record by clicking on it

❖ Click on the “Travel Request History”-icon to populate the “Travel Requests”-form (read only)

❖ Click the close-window symbol “X” to close the form

View an embarking/disembarking crewmember’s travel itinerary

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Gantt Scheduler” to populate the “Gantt Scheduler”-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember’s repatriation-/embarkation-date (port) from the “Schedule Headers” - the record will now be displayed in the “Scheduled Repatriations”/”Scheduled Embarkations”-box

❖ Select the crewmember’s record by clicking on it

❖ Click on the “Travel Itinerary”-icon to populate the “Travel Itinerary”-form (read only)

❖ Click the close-window symbol “X” to close the form

View an embarking/disembarking crewmember’s hotel request

Hotel-requests will be handled by the Air/Sea-department via “Travel Management”

Request a transfer for an embarking/disembarking crewmember

Transfer-requests will be handled by the Air/Sea-department via “Travel Management”

View an embarking/disembarking crewmember’s contact-details

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Gantt Scheduler” to populate the “Gantt Scheduler”-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ Select the crewmember's repatriation-/embarkation-date (port) from the "Schedule Headers" - the record will now be displayed in the "Scheduled Repatriations"/"Scheduled Embarkations"-box

❖ Select the crewmember's record by clicking on it

❖ Click on the "Person's Contact Mechanism"-icon to populate the "Contact Mechanism"-form (read-only)

❖ Select the different contact-type by clicking on the record to display the applicable contact-information

❖ Click the close-window symbol "X" to close the form

❖ The same functionality is also available in the "Available Resources"/box

Add/Delete a position-slot

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Gantt Scheduler" to populate the "Gantt Scheduler"-screen (Standard view)

❖ Select the ship, department(s) and position(s) from the respective drop-down menus to populate the schedules according to the selection-criteria chosen

❖ To add a new positions-lot: Click on the appropriate position-slot header which represents the position that requires an additional slot to be created

❖ Click the "Add Position Slot"-button to populate the "Create Position Slot"-form

❖ Select the department, position, ship and type of TOP from the respective drop-down menus in the form

❖ Enter the validity by clicking on the drop-down menu "Valid From" and "Valid Until" and select the new sign-off date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the fields)

❖ Click the "Save"-button to confirm the addition

❖ Click "Save" in the tool bar followed by "Refresh"

❖ The newly created position-slot will now appear in the Gantt Scheduler overview and is ready to be used for scheduling current/future assignments

❖ Position-slot which have been created as part of the standard TOP head-counts can be identified by the “N” in the “SPS”-column, any manually created position-slots in addition to the standard TOP will show a “Y” in this column.

❖ To delete an existing positions-lot: Click on the appropriate position-slot which is to be deleted

❖ Click the “Delete Position Slot”-button

❖ The system will prompt the following message “Position slot deleted, the deletion will not show unless the data is refreshed!”, click “OK” to proceed

❖ Click “Save” in the tool bar followed by “Refresh”

❖ The deleted position-slot will no longer appear in the Gantt Scheduler overview

Section V: Auto-Scheduler

This section will cover:

- ☐ General overview Auto-Scheduler
- ☐ Selection criteria
- ☐ Schedule Preferences
- ☐ Auto-scheduling process
- ☐ Viewing/reviewing a proposed schedule
- ☐ Confirming a proposed schedule
- ☐ Deleting a proposed schedule

General overview Auto-Scheduler

The Auto-Scheduler functionality is designed to provide the user with an efficient tool to schedule large numbers of crewmembers for a specific time-range at once while applying certain schedule preferences to the process.

Taking into consideration that general scheduling follows the principle of scheduling a replacement for a repatriating crewmember, the Auto-Scheduler will only provide proposed schedules based on scheduled repatriations, but not based on any vacancies/slots without current resources. These need to be scheduled manually via the Gantt- or Tabular-Scheduler.

All processed records remain proposals until confirmed as actual schedules or until the proposals are deleted.

In addition to the automatic functionality, the Auto-Scheduler also allows manual scheduling by selecting available resources for scheduled embarkations.

Selection criteria

❖ The Auto-Scheduler allows to user to customize the process by allowing various criteria to be selected

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Auto Scheduler” to populate the “Auto Scheduler”-screen

❖ Click on the drop-down menu for “Ship” and select the ship(s) to be included in the process by ticking the boxes next to the ship-record(s)

❖ Clicking once on “(Show All)” will select all ships at the same time, clicking on the same record for a second time will de-select all ships. The record “NAP” is not an actually ship, but stands for “Not Applicable”.

❖ Click on the drop-down for the “From”-field to select the starting-date from the calendar (alternatively, you can also overwrite the default of today’s date by typing the new date directly into the field)

❖ Click on the drop-down for the “To”-field to select the ending-date from the calendar (or overwrite the default by typing the new date directly into the field)

❖ Select the department(s) to be processed by the Auto-Scheduler from the drop-down “Department”

❖ Select the position(s) to be processed by the Auto-Scheduler from the drop-down “Positions”

❖ Click on “Schedule Preferences” to populate the “Scheduling Settings”-form

❖ Select the template to be used for the auto-scheduling process by clicking onto the record in the list of templates displayed

❖ Click the “Select”-button

❖ The system will prompt the following message “Your selection has been sent to the Auto-Scheduler” to confirm that the template has been applied to the process

❖ Click “OK” to close the message-box

❖ Click “Close” to close the “Scheduling Settings”-form

❖ This concludes the setup of the selection criteria for the auto-scheduling process

Schedule Preferences

The Auto-Scheduler allows applying various schedule preferences to the process of schedule proposals which in a later phase will be expanded to a full modeling-tool.

The user will be able to set up as many different templates as needed with variations of the multiple preferences. A Main Template which contains the standard settings as decided by the HR Department has been created and set up as a default for the initial phase.

During the initial deployment-phase of CMS, the Auto-Scheduler will –besides the date-range for the manning - only take “Ship Preference” and “Ship Class Preference” into consideration for the proposed schedules.

❖ Click on the “Schedule Preferences”-button in the main screen of the Auto-Scheduler to populate the “Scheduling Settings”-form

❖ Any existing templates will appear on the left-hand side of the screen – the associated settings will appear in the “Scheduling General”- and “Preferences”-tab on the right as you select the template by clicking on the record

❖ The “Scheduling General”-tab displays the manning date-range set to be applied, currently this is by default set to 14 days prior to the manning-date and 15 days after the manning-date

❖ Once set up, the manning date-range of the Main Template can’t be modified. In order to apply a different manning date-range to the process, a new template needs to be created. Also, please note that the “Requirements”-settings are currently not being used!

❖ The “Preferences”-tab contains a selection of various people-preferences which can be taken into consideration for the auto-scheduling process, however, only the “Ship Preference” and “Ship Class Preference” have been developed as this stage. All other options should therefore not be used!

❖ The Main Template’s setup includes already these two preferences

❖ To add a new template: Click on the “Schedule Preference”-button in the default Auto-Scheduler screen to populate the “Scheduling Settings”-form

❖ Click the “Add”-button – this will create a new, blank form for a new template

❖ The only indication that the new, blank form has been created is the description-line of the template in the "Scheduling General"-tab being blank (line above manning date-range)

❖ Enter the name of the new template into the free-text description-field of the "Scheduling General"-tab

❖ The manning date-range automatically defaults to the correct number of days, modify as needed

❖ Click on the "Preferences"-tab and select/de-select the "Ship Preference" and "Ship Class Preference" as applicable

❖ Click "Save" to save the addition

❖ To edit an existing template: Click on the "Schedule Preference"-button in the default Auto-Scheduler screen to populate the "Scheduling Settings"-form

❖ Select the template to be modified by clicking onto the record in the list of templates displayed

❖ Modify the template description, the manning date-range or preferences as needed and click "Save" to save the changes made

❖ To delete an existing template: Click on the "Schedule Preference"-button in the default Auto-Scheduler screen to populate the "Scheduling Settings"-form

❖ Select the template to be deleted by clicking onto the record in the list of templates displayed

❖ Click the "Delete"-button

❖ The system will prompt the message "Do you want to delete it?", click "Yes" to confirm deletion, click "No" to cancel the deletion

❖ Click "Close" to close the "Scheduling Settings"-form

❖ To apply an existing template to the auto-scheduling process: Click on the "Schedule Preference"-button in the default Auto-Scheduler screen to populate the "Scheduling Settings"-form

❖ Select the template to be used for the auto-scheduling process by clicking onto the record in the list of templates displayed

❖ Click the "Select"-button

❖ The system will prompt the following message “Your selection has been sent to the Auto-Scheduler” to confirm that the template has been applied to the process

❖ Click “OK” to close the message-box

❖ Click “Close” to close the “Scheduling Settings”-form

❖ If only the Main Template exists, the system will automatically apply its settings to the auto-scheduling process. Only if multiple template exists, has the appropriate template to be selected for each process separately.

Auto-scheduling process

❖ Select the criteria and schedule preference for the auto-scheduling process as described above

❖ Once all criteria have been selected, the system will populate the data for “Available Resources”, “Scheduled Repatriations” and “Scheduled Embarkations” as they exist already in the system

❖ Click the “Proceed”-button to start the auto-scheduling process

❖ The progress of the process will be shown by the progress bars for “Scheduling Sign-Off”, “Replacement Resources” and “Looking for Resource”

❖ Once the process has been completed, the system will prompt the following message “Auto Scheduling process finished!”, click “OK” to close the message-box

❖ During the auto-scheduling process, the system looks in the scheduled embarkations for the corresponding replacement for each crewmember scheduled for repatriation (actual manning).

❖ If the corresponding replacement is found, the system will display the respective crewID# in the “Replacement”-column (scheduled repatriation), respectively in the “Person to Replace ID”-column (scheduled embarkation)

❖ If no replacement is found in this cross-referencing, the system will then proceed to look for an appropriate replacement amongst the available resources. If one is found, the system will record the proposal under “Scheduled Embarkations” marked with a schedule status “Auto Scheduling Proposal”. If the system does not find any available resource, it will place a “0” into the “Replacement”-column and will change the color of the repatriating crewmember’s record under scheduled Repatriations from black to red. The reason for the difference in color will be visible in the “Audit for Replacements”-tab.

❖ In addition to the auto-scheduling, the user can also perform a manual scheduling in the Auto-Scheduler by selecting the schedule-header from the Manning List Headers, selecting the to be scheduled crewmember from the available resources and dragging & dropping the record in the “Scheduled Embarkations”-box – this will automatically record these scheduled embarkations in a “Actual Manning Mode”-status.

Viewing/reviewing a proposed schedule

❖ Once the auto-scheduling process has been completed, the proposed schedules are displaying in "Scheduled embarkations" and if applicable, also under "Scheduled repatriations" – they are easily identifiable by their status "Auto Scheduling Proposal" (versus the status "Actual Manning Mode" for already confirmed schedules)

❖ All proposed schedules remain as temporary schedules until they are either confirmed or deleted by the user

❖ As not all proposed schedules necessarily want to be turned into actual schedules, all displayed suggestions should be carefully reviewed prior to their approval

❖ The review can either be done line-by-line for every single proposed scheduled embarkation or alternatively, the user can utilize the Excel-export functionality to export the complete list of scheduled embarkations (actual and proposed schedules) for a better overview

❖ Any proposed schedule which should not be confirmed, will have to be deleted prior to the approval (see following sections for description of confirmation/approval and deletion of proposed schedules)

❖ Gantt view: The proposed schedules can also be viewed in the Gantt view for a better visual/graphic overview how the proposed schedules will fit in with the actual schedules already in place. Proposed schedules appear in gray color in the Gantt view. An additional functionality has been added which allows the user to confirm/approve any proposed scheduled directly in the Gantt view.

Confirming a proposed schedule

❖ Auto-Scheduler screen: In this screen the proposed schedules can only be confirmed via the "Approve All"-button, hence all unwanted schedule proposals need to be deleted prior to using this functionality

❖ In order to delete any individual proposed schedules, select the scheduled embarkation by clicking on the record and click the "Delete"-button in the tool bar – this will remove the record as a scheduled embarkation

❖ Once all unwanted proposals have been removed from "Scheduled Embarkations", click the "Approve All"-button

❖ The system will prompt the following message "Do you want to approve all temporary schedules?" – click "Yes" to confirm the approval, click "No" to cancel the approval-process

❖ Once the proposed schedules have been approved, their status will change from "Auto Scheduling Proposal" to "Actual Manning Mode"

❖ Gantt view: As proposed schedules also appear and can be reviewed in the Gantt view, the functionality was added to allow the user to confirm/approve any proposed schedules in the Gantt view as well. Proposed schedules appear in gray color in the Gantt view.

❖ In order to confirm a proposed schedule, right-mouse click on the crewmember's future schedule in the position-slot and select "Confirm Schedule"

❖ Click the "Save"-button followed by the "Refresh"-button in the tool bar to save the approval and to refresh the Gantt-view with the updated schedule-information

❖ The proposed schedule will now no longer appear in gray color, but in green which indicates a confirmed future schedule

Deleting a proposed schedule

❖ Any unwanted proposed schedule which should not be confirmed, will have to be deleted prior to the approval

❖ In order to delete any individual proposed schedules, select the scheduled embarkation by clicking on the record and click the “Delete”-button in the tool bar – this will remove the record as a scheduled embarkation

❖ For easy deletion of all proposed and non-confirmed schedules, click the “Delete All”-button at the top of the “Auto-Scheduler” screen

❖ The system will prompt the following message “Do you want to delete all the non approved schedules done by the Auto Scheduler?”, click “Yes” to confirm the deletion, click “No” to cancel the deletion-process

Section VI: Table of Personnel

This section will cover:

- ☐ General overview
- ☐ Managing the Table of Personnel

General Overview

The Table of Personnel represents the approved (and budgeted) operational head-count per ship and per position. The head-count for each position is determined and approved on a fiscal year basis, hence the setup/modifications will generally only occur once a year.

The Table of Personnel within CMS is not only the reflection of the approved number of crewmembers within a given position, but the settings also automatically create the corresponding position-slots in the Tabular- and Gantt-Scheduler.

The Table of Personnel-screen is following a tree-structure, starting with the ship-selection, followed by department and position – the head-count is then determined on the position-level which creates the corresponding number of position-slots

The Table of Personnel will be managed and maintained by the HR Super User(s).

Managing the Table of Personnel

❖ Click on "Scheduling" in the menu bar of the default screen and select the option "Table of Personnel" to populate the "Table of Personnel"-screen

❖ In order to display the Table of Personnel Details on a position-level for a specific, the user first needs to select the appropriate ship

❖ Click the "+"-sign next to the respective ship in the "Departments"-box to expand the listing of departments for the ship

❖ Select the department by clicking on the record in the listing – this will populate the Table of Personnel Header and –Details for this specific ship and department to display on the right-hand side of the screen

❖ The "Table of Personnel Header" has been created during the data-migration from SGP to CMS and does not require any further modification

❖ To add a new Table of Personnel Header: Click into the "Table of Personnel Header"-box (white area) to place the focus into this area

❖ Click the "Add"-button in the tool bar to populate the "Table of Personnel Header Editor"

❖ Click the "+"-sign next to the respective ship in the "Departments"-box to expand the listing of departments for the ship

❖ Select the department by clicking on the record

❖ Click the “Add Header”-button

❖ Enter the code and description into the respective fields of the overview on the right

❖ Enter the header’s validity by clicking on the drop-down menu of “Valid From” and “Valid To” and selecting the new date from the calendar (alternatively, you can also overwrite the shown date by typing the new date directly into the field)

❖ Click the “Save”-button

❖ Click the “Save”-button in the tool bar followed by “Refresh”

❖ To modify an existing Table of Personnel Header: Select the record to be modified by clicking on it and click on the “Edit”-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the “Save”-button in the tool bar to save the changes made

❖ To delete an existing Table of Personnel Header: Select the record to be deleted by clicking on it and click on the “Delete”-button in the tool bar

❖ The header will instantly be deleted (no additional deletion-confirmation message is prompted!), unless further details (head-count, position-slots) already exist for the header

❖ Click the “Save”-button in the tool bar followed by “Refresh”

❖ The head-counts for the current TOP have been migrated into the Table of Personnel Details already, hence only modifications should be needed.

❖ To add new Table of Personnel Details: Select appropriate Table of Personnel Header by clicking on the record.

❖ Click into the “Table of Personnel Header”-box (white area) to place the focus into this area

❖ Click the “Add”-button in the tool bar to populate the “Table of Personnel Details Editor”

❖ Select the position by clicking on the record

❖ Click the “Add Position”-button – the selected position will now show in the header

❖ Select the preferred country and preferred contract from the respective drop-down menus and enter the Operations Head Count and all other relevant data in the appropriate fields of the overview on the right

❖ Click the “Save”-button

❖ Click the “Save”-button in the tool bar followed by “Refresh”

❖ To modify existing head-counts in the Table of Personnel Details: Select the record to be modified by clicking on it and click on the “Edit”-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the “Save”-button in the tool bar to save the changes made

❖ To delete existing Table of Personnel Details: As the system automatically creates the corresponding position-slots when adding Table of Personnel Details, the Table of Personnel Details can only be deleted after the attached position-slots have been deleted first!

❖ Select the position-slot record to be deleted by clicking on it in the “Position Slots”-box and click on the “Delete”-button in the tool bar

❖ The system will prompt the following message “Do you want to delete this row?”, click “Yes” to confirm the deletion, click “No” to cancel the deletion-process

❖ If the position-slot is currently in use (a position is scheduled in this position-slot), the system will prompt the following message “You must move the assigned resource to another empty slot before you can delete this record”, click “OK” to proceed – continue to re-schedule the resource and afterwards return to Scheduling/Table of Personnel/Position Slots to continue the deletion-process as described above

❖ Select the Table of Personnel Details-record to be deleted by clicking on it in the “Table of Personnel Details”-box and click on the “Delete”-button in the tool bar

❖ The system will prompt the following message “Do you want to delete this row?”, click “Yes” to confirm the deletion, click “No” to cancel the deletion-process

❖ Click the “Save”-button in the tool bar followed by “Refresh”

Section VII: Manning Ports Management

This section will cover:

- ☐ General overview
- ☐ Managing Manning Ports

General Overview

The Manning Ports Screen gives the user not only the ability to review any manning port entries which have been created automatically in conjunction with the MXP-interface for each ship, but it also allows the user to create additional manning ports, if needed.

Based on the ship-selection and the date-range chosen, the list of Manning Ports populates and provides port of call details such as arrival-/departure-date and –time, time-zone, port-descriptions, voyage- and region-information.

The user can this way retrieve valuable itinerary-information per ship without having to search through the various schedule-headers in the various scheduling-tools (Tabular-, Gantt- and Auto-Scheduler).

As the system automatically creates the list of manning ports based on its link to MXP and the port-setup in CMS FC Admin, only rare incidents would require a manual addition of manning ports, e.g. not-onboard trainings/conferences to be grouped under one separate schedule-header.

Managing the Manning Ports

❖ Click on “Scheduling” in the menu bar of the default screen and select the option “Manning Ports Management” to populate the “Manning Ports Management”-screen

❖ To view an existing manning ports list: Select the ship from the drop-down “Ship”

❖ Select the date for the query by clicking on the date in the calendar-display in the “Date or Date Range”-box – the selection will automatically populate the manning port list for this specific date in the “Manning Ports List”-box

❖ In order to select a date-range, select the start-date by clicking on the date in the calendar, while left-mouse clicking on the record, select all other dates by moving the mouse over the records in the calendar until the end-date for the query has been reached. The selected dates will now display in dark blue and the manning ports list populates according to the date-range selected.

❖ In order to display the port-details, select the specific date/port in the “List of Manning Ports” – the port-details will display on the right in the “Port of Call Details”-box

❖ To add a new manning port entry: Select the ship from the drop-down “Ship”

❖ Select the date for the query by clicking on the date in the calendar-display in the “Date or Date Range”-box – the selection will automatically populate the manning port list for this specific date in the “Manning Ports List”-box (or alternatively, select a date-range as described above)

❖ Select one of the records within the list of manning ports to place the focus into this area

❖ Click the “Add”-button in the tool bar to populate the form “Manning Ports – Add New”

❖ Select the ship from the drop-down “Ship”, enter the date-range to be queried and click the “Refresh”-button – the ship’s itinerary for this date-range will now display in the “Itinerary”-box

❖ Select the date/port that should be added to the manning port list by clicking on it in the “Itinerary”-box

❖ Drag the selected record from the “Itinerary”-box into the “List of Manning Ports”-box – the record will now disappear from the itinerary-list and display in the list of manning ports

❖ Once completed, click the “Save”-button to save the changes made

❖ Click the “Close”-button to close the form

❖ Click the “Save”-button in the tool bar followed by “Refresh”

❖ The addition will now display in the “List of Manning Ports”-box and will be available for selection when manually creating additional schedule-headers in the Tabular- and/or Gantt-Scheduler

This section will cover:

- ☐ Hotel and Transfers
- ☐ Person Travel Data
- ☐ Hotel Request Control
- ☐ Transfers Requests Control
- ☐ Travel Blocks

Hotel and Transfers

The “Hotel and Transfer”-functionality within CMS is linked to the automated flight-booking functionality within the system (CMS => RightRez => Sabre) and will complete the crewmember’s travel-arrangements for a sign-on- or sign-off movement. Whereas the flight-requests are automatically triggered by any scheduling or changes made by the planners in CMS, the hotel- and transfer-arrangements fall into the responsibility of the Air/Sea-department.

❖ Due to the dependency of the hotel- and transfer-arrangements on the flight-itinerary, the “Hotel and Transfers”-functionality can only be used in conjunction with already existent flight-itineraries.

❖ Click on “Travel Management” in the menu bar of the default screen and select the option “Hotel and Transfers” to populate the “Hotel and Transfers”-screen

❖ Click on the drop-down menu for “Ship” and select the ship to be processed – this will populate the ship’s schedule-headers in the “Manning List Headers” for the default date-range (from today’s date to a month from today’s date)

❖ At this time, the system will only allow you to process one ship at the time.

❖ Click on the drop-down for the “From”-field to select the starting-date from the calendar (alternatively, you can also overwrite the default of today’s date by typing the new date directly into the field)

❖ Click on the drop-down for the “To”-field to select the ending-date from the calendar (or overwrite the default by typing the new date directly into the field)

❖ Select the department(s) to be processed from the drop-down “Department”

❖ Select the position(s) to be processed from the drop-down “Positions”

❖ Clicking once on “(Show All)” will select all departments/positions at the same time, clicking on the same record for a second time will de-select all departments/positions.

❖ Select the schedule-header/date you would like to process hotel- and transfer-requests for by clicking on the appropriate record in the “Manning List Headers” – this will automatically populate the scheduled repatriations and scheduled embarkations for this particular ship on this specific date

❖ Ideally, all crewmembers scheduled to repatriate or embark should already have a flight-itinerary associated with their record – to determine whether a flight-itinerary exists or not, check the “Travel Itinerary”-column of each record, a checkmark indicates existing flight-arrangements. Only these crew-records can be processed for hotel- and transfer-requests!

❖ In order to view the existing flight-itinerary, select the record in the scheduled repatriations/embarkations-list by clicking on it and click on the “Air Itinerary”-button (airplane-icon)

❖ This will populate the “Travel Itinerary”-form (a read-only form) which contains all flight-reservation relevant information, e.g. itinerary, carrier, status, booking-number, ticket-number, PNR etc.

❖ Click the close-window symbol “X” to close the form

❖ In order to process a hotel-request for a crewmember, select the record in the scheduled repatriations/embarkations-list by clicking on it and click on “Hotel Request”-button (hotel/building-icon)

❖ The Hotel Reservation Request Editor will open and will display the default settings based on the crewmember’s rank and his/her travel-itinerary, e.g. primary hotel for target-airport, hotel-category, room-type, reservation-dates as well as flight-details

❖ Review the details and make modifications to the hotel-information, if applicable – once completed, click “Save” to save the modifications and to complete the hotel-request

❖ Click “Close” to close the editor-form

❖ In order to process a transfer-request for a crewmember, select the record in the scheduled repatriations/embarkations-list by clicking on it and click on “Transfer Request”-button (car-icon)

❖ The Transportation Request Editor will open and will display the default settings based on the crewmember’s travel-itinerary, respectively on the target-airport

❖ Review the details and make modifications to the transfer-information, if applicable – once completed, click “Save” to save the modifications and to complete the transfer-request

❖ Click “Close” to close the editor-form

❖ Both, the “Hotel Request”- as well as the “Transfer Request”-icon are now grayed out, indicating that the requests have been created

❖ In order to confirm/approve the requests, click the “Approve All”-button – the crew member’s record will now show checkmarks in the “Hotel”- and “Transfer”-column

❖ At this stage, hotel- and transfer-request can only be processed for each crew individually – batch-process does currently not exist.

❖ For the complementing steps within Sabre, please refer to the description in the departmental-/operations-manual composed by Air/Sea.

Person Travel Data

Please refer to Section IV People/Travel

Hotel Request Control

Currently not used

Transfers Requests Control

Currently not used

Travel Blocks

In order to maintain low overall travel-costs associated with crew-movements, travel blocks are purchased for specific flight-itineraries on specific, fixed manning-dates. Travel block differ for each ship depending on the itinerary, respectively the ship's home/turn-around ports and are – generally speaking – limited to flights to/from Jakarta, Indonesia and Manila, Philippines. Parameters have been set within the CMS-/RightRez-system to identify crewmember's eligibility for travel block space – this will be processed behind the scenes and not visible to the user. However, the user will be able to identify schedule-headers for which travel blocks have been set up. If there are any travel blocks associated with a ship's specific port of call, the corresponding schedule-header will appear in the schedule header list in light blue color. This way, planners can easily identify the so-called block-dates and schedule (Indonesian and Filipino) crewmembers with home airports in Jakarta and/or Manila preferably on these manning-dates.

❖ Click on "Travel Management" in the menu bar of the default screen and select the option "Travel Blocks" to populate the "Travel Blocks"-screen

❖ To add a new travel block: Click into the "Travel Blocks"-box (white area) to place the focus into this area

❖ Click the "Add"-button in the tool bar to populate a new entry-line in the grid

❖ Select the ship from the drop-down "Ship"

❖ The record "NAP" is not an actually ship, but stands for "Not Applicable". Also, "ALL Ships" is not a valid selection – travel blocks can only be set up for each ship individually!

❖ Select the appropriate airline from the drop-down "Airline"

❖ Select the airport of origin from the drop-down "Source Airport"

❖ Select the airport of destination from the drop-down "Target Airport"

❖ Click on the drop-down for the "Date"-field to select the block-date from the calendar (alternatively, you can also overwrite the default of today's date by typing the new date directly into the field)

❖ Enter the number of travel block spaces reserved into the "Seat Number"-field

❖ Click the "Save"-button in the tool bar to confirm the addition

❖ To edit an existing travel block: Select the record to be modified by clicking on it and click on the "Edit"-button in the tool bar to enable to record for modifications

❖ Make the necessary modifications to the selected record

❖ Click the "Save"-button in the tool bar to save the changes made

❖ To delete an existing travel block: Select the record to be deleted by clicking on it and click on the “Delete”-button in the tool bar

❖ The system will prompt the message “Do you want to delete this row?”

❖ Click “Yes” to confirm the deletion, click “No” to cancel the deletion

❖ As any modifications will not only impact the display of the schedule-headers in the Gantt- and Tabular-Scheduler, but also might result in travel-related discrepancies (date, space, block-inventory or similar), these should only be made by authorized users.

Section IX: Financials

This section will cover:

- ☐ Payroll Transactions To Ship

Payroll Transactions To Ship

Currently not used - pending fleet-wide SPMS-upgrade

Section X: FAQ

This section will cover:

☐ Frequently Asked Questions

Frequently Asked Questions

- Where I can quickly look up a crewmember's future assignment? People/People Management/Schedule

- Where do I see the promotion-list or whether a crewmember is on the promotion-list
- My report is not generating – what do I do?
- How do I handle (seasonal) additional position-slots for a charter?
- Where do I find the standby-list?
- Will manning-agencies be able to change a crewmember's availability-date?
- Will CMS also make flight-arrangements for Filipino-joiners when I schedule them?
- Where/how do cancelled assignments (contracts) show in CMS?
- How to I re-activate a crewmember who had previously resigned, was medically unfit or had been terminated before?
- I no longer can log into CMS – what do I do?
- Some of the forms seem to be cut off on my screen – how can I change this?
- Can I log into the system more than once at the same time? If so, will the information entered into one screen automatically also be available in the other screen?
- Why do I have to click "Refresh" after most of the scheduling in the Gantt?
- Why do we only have no/read-only access to SGP?
- Some of the data I've previously entered in SGP is not showing in CMS – what do I do?
- Can I connect to CMS remotely from home or when I'm traveling?