CERTIFICATE MODULE USER'S GUIDE

Version 1.7 (Sep 3, 2018)

Table of Contents

Change Log

Version	Date	Description
1.0	May 18, 2012	Initial draft
1.1	Jun 1, 2012	Published
1.2	Nov 19, 2012	Updated content to reflect enhancements made to the module
1.3	Apr 28, 2014	Updated template style
1.4	March 4, 2016	Updated content to reflect enhancements made to the module
1.5	May 2, 2016	Updated images and content for scheduled reports, TOC format updates
1.6	August 14, 2017	Updated images and content to reflect enhancements made to the module
1.7	Sep 3, 2018	Updated screenshots

Introduction

<u>Purpose</u>

This document outlines the features of the certificates module. We have split the document into logical sections in order to explain the various features of the module in a clear and concise manner. At the end of the document, there is a Frequently Asked Questions (FAQ) section which answers the most commonly asked questions about the certificates module.

If you have any questions regarding this document then please email support@Q88.com.

1. Main Certificates Page

The main certificates page has been redesigned and now offers several new features to better help you manage the certificates for your fleet.

1.1 Overview

The below image is a screen-shot of the main certificates page; this is the new standard interface which will be used across many of the modules and offers several key enhancements that allow better access to manage and view your certificates.

If you have your vessels split into multiple fleets then the 'All Fleets' drop-down will be displayed in the upper-left corner of the page. Selecting a fleet from the drop-down will refresh the view for the vessels in the selected fleet.

The 'All Certificates' menu allows you to select from a pre-defined list of 'System' views of your fleets' certificates. You also have the ability to create your own 'Custom' views. See Section 1.2 "Selecting Views" and Section 1.3 "Creating Custom Views" for more information.

Click the plus button "Add New Certificate" to add a new certificate. (Refer to Section 3.1 for more details)

Any certificate that has a document attached will show a paperclip next to the vessel name which you can click on to view the certificate. The color of the paper clip means:

- 📎 Publish Document available for download by anyone (charterer, broker, agent) that has an account on the web site
- 📎 Private Document only available to those in your company and to those companies that have been granted access to the vessel.

The "Actions" button contains several options which can be performed from this page. They are explained further below:

Export to Excel:
Exports the current list of certificate records to Excel.

Email Documents:
Allows you to select and send documents from Q88 by email.

Summary Report:
Creates a summary report in (Excel) for all selected certificates.

Email Offline Form:
Sending offline form to vessel and get the Master to assist in updating the certificates/documents date.
(Refer to Section 6 for more details)

Scheduled Report:
Schedule a report of any view (system or user created) to be emailed to you.

Settings:
This page allows you to adjust the settings to the Certificates module.

Refresh Data:
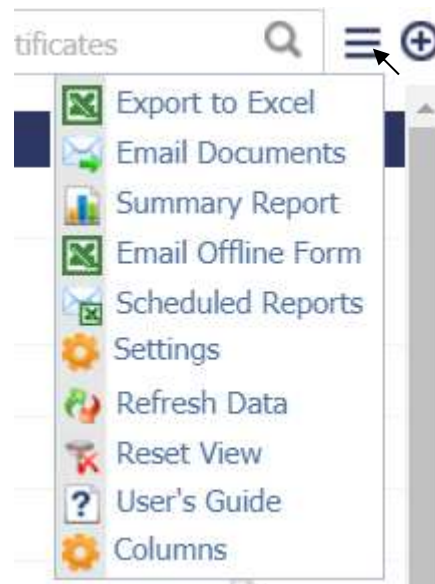Refresh the underlying data from the database.

Reset View:
Resets the sorting and filtering for the selected View.

User's Guide:
Download the User's Guide to the certificate module.

Columns:
Click here to see a list of the columns that are available.

1.2 Selecting Views

The "All Certificates" drop-down allows you to select different ways to display the certificate information for your fleet. By default, the system provides several 'System' views. They are explained further below:

- **System Views:** Visible to all people in your company, fixed default views created for all account.

All Certificates:
All certificates for your vessels.

Due Certificates:
All the certificates which are due.

Expired:
All the certificates which have expired.

Favorites:
Customize the list of certificates which are commonly use.
(Refer to 1.11 for more details)

Missing:
List of all the certificates which are missing.

Valid:
Lists all certificates which are not missing.

1.3 Creating Custom Views

In addition to the 'System' views explained in Section 1.2, the certificate module allows you to create our own custom views.
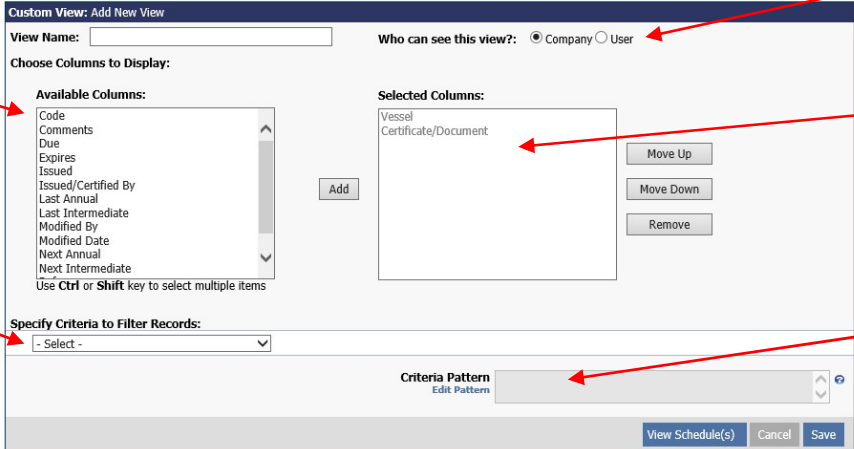
There are two types of custom views that can be created:

- **Company Views:** Visible to all people in your company that have a login under your account. (Only user with account admin permission will be able to create this views)
- **User Views:** Only visible under individual login
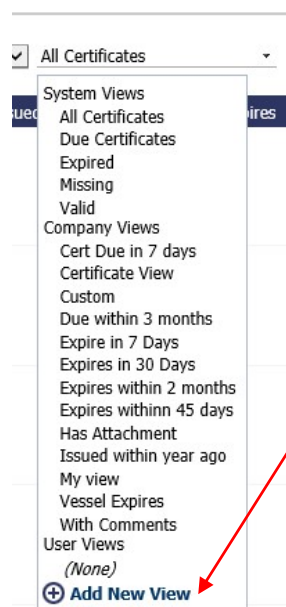
Click the 'Add New View' link to add a new Company or User view.

The 'Add New View' page will now be displayed:

Enter the name of the view.

Choose from the list of columns you wish to display for the view.

Specify the criteria you wish to filter the records on.

Specify whether this will be a 'Company' or 'User' view.

List of selected columns to be displayed.

Specify how the selected criteria should be logically handled.

Criteria columns available to filter records on:

- Certificate/Document: Name of the certificate
- Code: Internal document code you can specify for each certificate
- Comments: This field contains the remarks entered for a certificate
- Due: The next due date for the certificate, this can be the next annual, next intermediate or expiration date whichever occurs first.
- Expires: Date the certificate expires
- Has Attachment: Use to filter on certificate and have or do not have the certificate file attached
- Is Favorites: Use to filter on certificates which is under your favorite list
- Is Missing: Use to filter on certificate which are missing
- Issued: Date the certificate was issued
- Issued/Certified By: Company that issued or certified the certificate
- Last Annual: The last annual renewal date of the certificate
- Last Intermediate: The last intermediate renewal date of the certificate
- Next Annual: The next annual renewal date of the certificate
- Next Intermediate: The next intermediate renewal date of the certificate
- Reference: The reference information for the certificate (ex. "SOLAS 1974")
- Reminder: To filter the certificates base on the reminder date which you had set. It will be the date which window alert commenced.
- Type: This is the Document Type field
- Vessel: Use to filter the list of certificates which you want or do not want to see for certain vessels.
- Window: Use to filter the list of certificates showing specific window range

Editing the Criteria Pattern:

Use the Criteria Pattern editor to modify the way the criteria logic is handled. The Criteria Pattern editor allows the following text to be entered:

- Parentheses/Round Brackets '(' and ')': Use to group criteria together
- AND Operator: Use between two criteria where the records should match both criteria
- OR Operator: Use between two criteria where the records should match one or both criteria
- Criteria Row Number: #

Please note the following:

- If the brackets do not match it will display an error.
- The number of criteria entered must match the numbers given in the criteria pattern editor.
- If any of the criteria numbers are missing in the Criteria Pattern editor then an error will display.

Below is a list of example criteria's which can be entered:

- 1 and 2
- 1 or 2
- (1 and 2) or (3 and 4)

1.4 Column Selection

The certificate grid supports custom column selections.

Click the 'Columns' button to see a list of the columns that are available.

Once the Column is added for the selected View it will remain n the grid until removed. Each View will have its own set of columns which can be customized by each user.

Note: The 'Export to Excel' function will export the columns that have been selected in the current View.
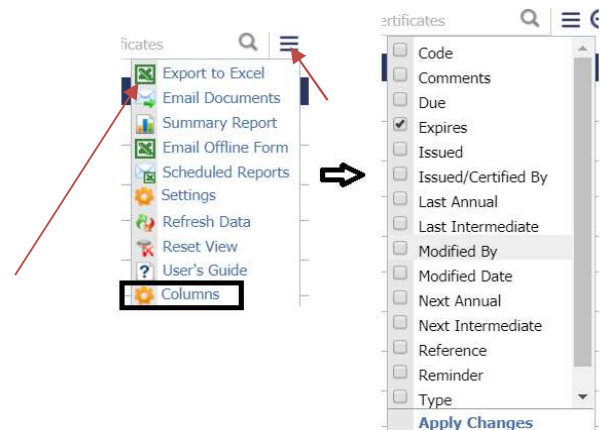
1.5 Column Ordering

The grid supports column reordering. You can drag-n-drop the columns to change the order in the grid.

Left-click and drag the column to another location and drop the column. The grid will automatically refresh with the new column ordering set.

Each view will have its own column ordering which can be customized by each user.

1.6 Column Resizing

The grid supports custom column resizing.

Please the mouse cursor between two columns and the resize icon will be displayed (↔). Drag the column left or right and the size will be automatically adjusted.

Each view will have its own column ordering which can be customized by each user.

1.7 Column Sorting

The grid supports multi-column sorting. An arrow is displayed next to each column which has been sorted. To sort by a specific column, click on the column header. To sort by multiple columns, hold down the Shift key and click each column you wish to sort by.

The screen-shot below shows the sorting by Vessel Name (ascending order) and Certificate (ascending order).

1.8 Filtering the Data

The grid supports column filtering. This is similar to the filtering available in Microsoft Excel® or SharePoint® (if you are familiar with those software applications).

To filter the data, click the grey triangle in the header of the column you wish to filter on. A popup menu is displayed letting you select the items you wish to filter on. Click the 'Apply Filter' link to apply the filter on the selected items.
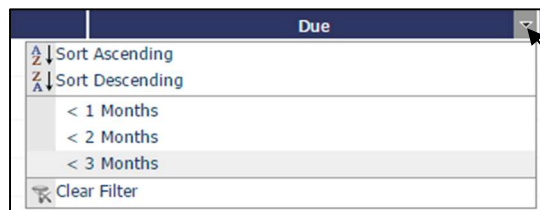
Once a filter has been applied the 'filter icon' is displayed in the column header and a dark-grey bar is shown across the top of the grid indicating which column has been filtered on (shown below).

1.9 Paging

By default, the grid will display 15 records per page. You can change that option in the bottom-right corner of the page to 25, 50 or 100 records per page.

The paging buttons, shown at the bottom of the page, allow you to browse through the pages.

1.10 Certificate Settings

The "Certificate / Documents Settings" page allows you to adjust the settings for each certificate. You can find the link to the "Settings" page under the "Actions" menu.
Remarks: Settings feature could only be access by account admin user
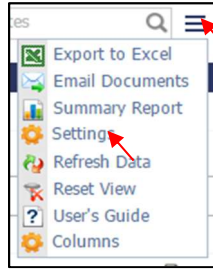
When you click the "Settings" link, below page will display:

Here you can adjust the settings for each certificate. The fields that can be customized are explained below:

- **Not Used:** Checking this box will hide the certificate for your entire fleet (unless you have already entered the data for a vessel). This is useful if you would like to hide a certificate which does not apply to your fleet.
- **Type:** By default, the system will assign each certificate a 'Document Type', you can change the 'Document Type' for each certificate and even add your own document types
- **Code:** This is an internal reference code that you can assign to each certificate.
- **In offline form:** Customize the list of certificates to be show in the offline form

When you have made the necessary changes, please be sure to click the 'Save' button at the bottom of the form.

1.11 Creating favorite list

Favorite list can be created for a list of certificates which will be commonly in use.
This is to assist in speeding up the viewing/updating process.
Favorite list can be created by clicking on " ⭐ " showing next to certificate/document name.

Once certificate/document is listed as favorite it will be showing in a yellow highlighted ⭐

You can access to your favorite list by clicking from "all certificate" drop down under system views.
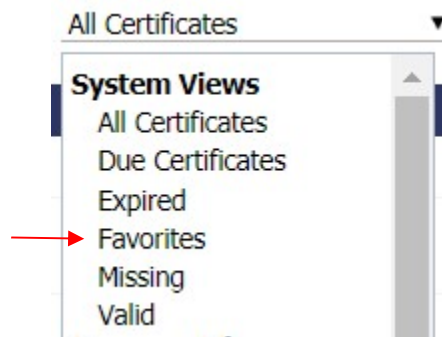
2. Certificate Details

The certificate detail page can be accessed by clicking the "Edit" icon ✏️ in the right column for any record in the grid.

2.1 Overview

The screen-shot below shows what is displayed in the certificate details page for the selected vessel/certificate.

Each section of the page is explained in further detail below.

The 'Document' drop-down in the top left corner of the page displays the name of the certificate you are currently editing. You can click the drop-down box to switch to any of the other certificates for the selected vessel.

In the top right corner of the page you can see when the certificate was last modified and by whom.

Modified Date: Mar 30, 2016
Modified By: Q88 Sales Demo

Below the 'Document' drop-down, the first panel displays the applicable dates for each certificate.

Dates	Last (Issued)	Next (Due)	Window
Issued:	Oct 03, 2021		
Annual:	Jul 17, 2019	Apr 04, 2012	±2 Months
Intermediate:	Nov 02, 2015	Apr 01, 2020	±6 Months
Expires:		Dec 02, 2020	2 Months
Special Survey:		Apr 01, 2015	±1 Month

The 'Next (Due)' column will display a status light for each date (if entered). The status lights will show the following colors:

Valid: The due date of the certificate is in the future and outside the set window.

Renewal   Due: The due date is currently within the renewal window.

Expired: The due date is after the renewal window and the certificate has expired.

You can manually adjust the window range for each certificate due date. Click the hyperlink in the 'Window' column to set a new range.

Dates	Last (Issued)	Next (Due)	Window
Issued:	Jul 17, 2011		
Annual:	Feb 12, 2014	Apr 11, 2016	±1 Month
Intermediate:			
Expires:		Jul 19, 2018	2 Months
Special Survey:	Mar 28, 2009	Apr 29, 2019	±6 Months

Once you set the new range, the system will prompt you if you would like to save this change to all vessels that have this certificate.
Once window range is set up, weekly email alert notification will be send to you as a reminder.
Example: If window range is set as 1 month for under Expires criteria, email notification will be sent out on weekly Friday, 1 month before the indicated expires date. (Refer to 6. Scheduled report for more details)

☐ Apply **Window Range(s)** to ALL vessels using this certificate.

| None |
| 1 Month |
| 2 Months |
| 3 Months |
| ±1 Month |
| ±2 Months |
| ±3 Months |
| ±6 Months |
| ±9 Months |
| ±12 Months |

Dates	Last (Issued)	Next (Due)	
Issued:	Dec 05, 2009		
Annual:	Jan 01, 2012	Not Applicable	
Intermediate:			
Expires:		Oct 28, 2011	1 Month
Special Survey:	Sep 21, 2012	May 05, 2017	±6 Months

Below the date panel, you will see the 'Other Information' panel which includes additional ancillary fields applicable to this certificate:

Other Information

Place of annual survey	
If Classification society changed, date of change	📅
Classification society	Det Norske Veritas ▼
Date the vessel was registered in classification society	📅
Is the vessel subject to any conditions of class, class extensions, outstanding memorandums or class recommendations?	○ Yes ● No
If the vessel is subject to any conditions of class, class extensions, outstanding memorandums or class recommendations, give details	test test
Is the vessel free of conditions of class?	○ Yes ○ No

On the right side of the page is the 'Attachments' panel where you can upload multiple attachments for the certificate.

Attachments	Date	Publish
☐ 📄 DEMO COC	Mar 18, 2016	🔒
Attach File		

The Attachments panel does support drag-n-drop.

Attachments	Date	Publish
➡ ☐ 📄 DEMO COC	Mar 18, 2016	🔒
Drop File Here To Upload		
Comments		

For each certificate, you have the ability to specify if the certificate should be 'Public' or 'Private'. Click the image icon to change the settings.

- ⬢ Publish Document available for download by anyone (charterer, broker, agent) that has an account on the web site
- ⬢ Private Document only available to those in your company and to those companies that have been granted access to the vessel.

Clicking the file name will display a preview pane for the selected attachment. The preview pane is not available for Microsoft Office documents but most other file types is supported.

Below the 'Attachments' section you will find the 'Comments' section. Here you can enter comments about the certificate. (For internal usage)

3. Adding a New Certificate
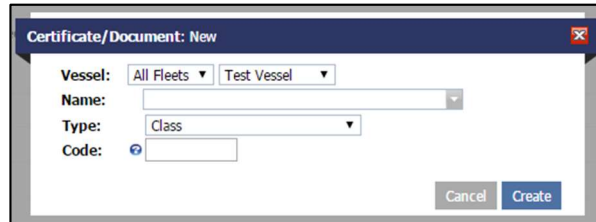
The Certificate module allows you to upload your own documents, instructions are outlined below.

3.1 Adding a New Documents

Click the plus button "Add New Certificate" to add a new certificate to the system.

A new page is displayed where you can specify the vessel, name of the certificate you wish to add.

*Reminder: Please ensure the certificate/document which you would like to add is **NOT** listed in the system. As all the default listed certificate/documents are sync with other module. If duplicated certificate/document are added, information might not be updated correctly.

4. Deleting a Certificate

Any certificate can be deleted from the system. Click the 'Delete' button at the bottom of the Certificate detail page in order to delete the certificate.
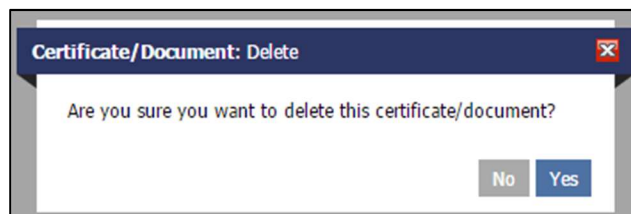
When you delete a certificate for a vessel it only removes the data and attachments for the selected vessel/certificate. The certificate itself will remain in the system in case you need to add it again later.

5. Copying a Certificate

The Certificate module has the ability to copy a certificate, along with any attachments, to another vessel or your entire fleet. This is useful in situations where the certificate applies to multiple vessels or all the vessels in your fleet.

You will find the 'Copy Document' function under the 'Actions' menu when you are viewing a particular certificate.

Once you click the 'Copy Document' link, below popup window will display where you can select the vessels that you want to copy the certificate information to.
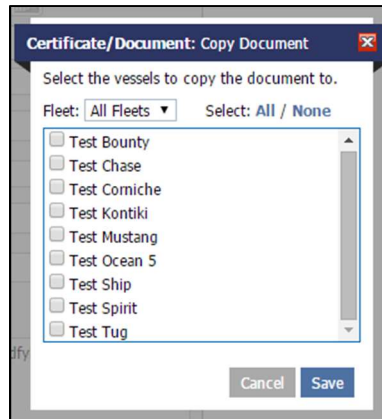
Select the vessels and click the 'Save' button to perform the copy function.

6. Email offline form

You will be able to get the Master to assist in updating the certificate date by sending offline form to them.

Click on ☰ from the certificate/document overview page
Select "Email offline form"

Bulk offline form can be send out to all vessels in your fleet. Or otherwise, you can also choose the vessels you wish to send the form to.

Once you have selected the vessels, click on "email" to proceed.

Certificate Offline Form: Bulk Email

Fleet:	All Fleets ▾	

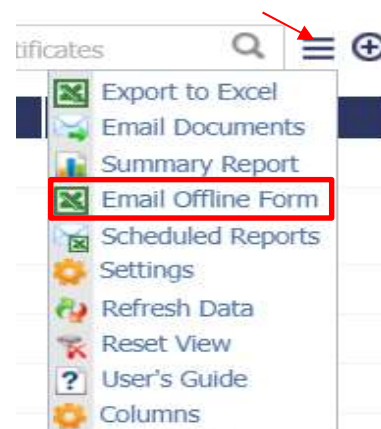| Select	Vessel Name	Email Address
☑	Demo Eagle Ray	masterdemoeagleray@vessel.com
☑	Demo Manta Ray	masterdemostringray@vessel.com
☑	Demo Stingray	masterdemostringray@vessel.com

Cancel   Email

System will reflect a compose email template consist of the attachment of offline form and the instructions for updating the offline form will be reflected in the message content.

Compose Email

	Vessel Name	File(s)	Action
To:	Demo Eagle Ray	Demo_Eagle_Ray	✖
	Demo Manta Ray	Demo_Manta_Ray	✖
	Demo Stingray	Demo_Stingray	✖

Cc:

Subject: q88.com Certificate Offline Form

Message:

Font ▾ Size ▾ **B** *I* U ≡ ≡ ≡ ≡ ≣ ≣ ≢ ≢ **A** ▾ abe x² x₂ ✓ ᴬᴮᶜ 🔲 🕓

Good day,

We are presently updating our records and need the attached Certificate Offline Form completed. We kindly request that you open the attached file using Microsoft Excel 2003 or later.

Instructions for completing the form are included in the spreadsheet.

The completed file should be emailed to download@Q88.com where it will be automatically imported.

Thank you for your assistance.

Best regards,
Q88 Sales Demo
Sales Demo
Q88 DEMO
demo@q88.com
+1 203 413 2030

Options: ☑ ZIP 🖥

Cancel   Send Email

Certificates/documents offline form will be in Microsoft Excel format.
Below screenshot show an example of the offline form.

Remark: Offline form will be expired after 1 month upon sending out to vessel.
In the form, it will reflect the expiry date.

Q88.COM — Certificate Offline Form: Demo Eagle Ray (IMO: 1777739)

Please email this form when completed to download@q88.com

Form Expires: Sep 13, 2017

Certificate Name	Issued	Last Annual	Next Annual	Last Intermediate	Next Intermediate	Expires
Arctic Pollution Prevention Certificate (APPC)						
Asian Gypsy Moth Certificate (AGM)						
Ballast Water Management Plan						
Bollard Pull Certificate						
Cargo gear						
Cargo Securing Manual						
Cargo Ship Safety Construction Certificate (SCC)	Feb 10, 2015	Aug 08, 2019	Oct 03, 2017			Feb 20, 2018
Cargo Ship Safety Equipment Certificate (SEC)	Mar 22, 2018	Not Applicable				Feb 18, 2018
Cargo Ship Safety Radio Certificate (SRC)	Jan 18, 2017	Nov 09, 2016				Jan 17, 2021
Certificate of Class (COC)	Jul 10, 2015	May 18, 2016	Aug 23, 2019			May 20, 2020
Certificate of Compliance for Solid BC (IMSBC)						
Certificate of Fitness (COF) Chemicals	Aug 28, 2013	May 24, 2014			Feb 09, 2017	Sep 13, 2018
Certificate of Fitness (COF) Gas	Not Applicable	Not Applicable				Not Applicable
Certificate of Insurance (H&M)						Aug 10, 2019

Once Master had completed updating the dates.
Master will have to save the offline form and attached it in an email and send to download@q88.com
Once offline form is imported, certificates date will be updated in your Q88 account accordingly.
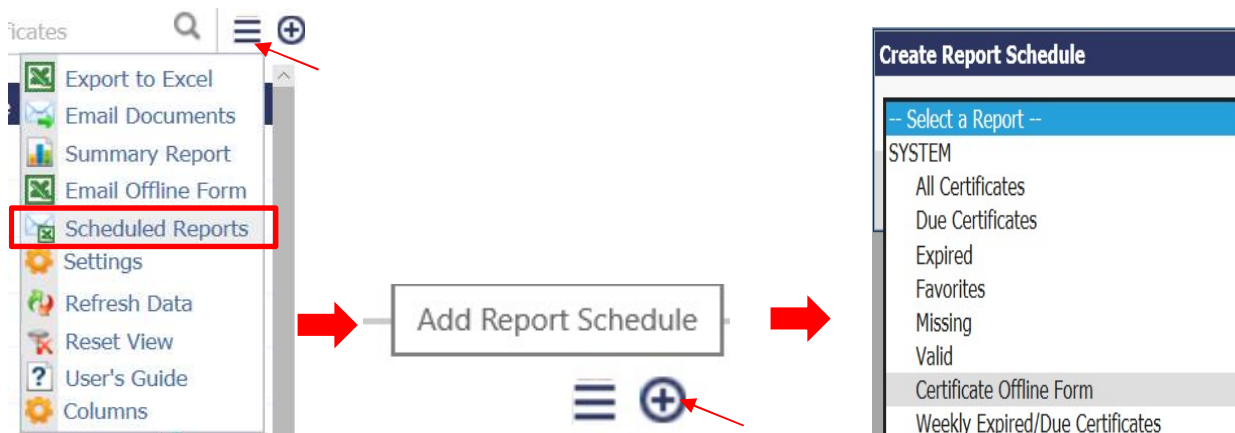
You may also wish to set up **scheduled report** to receive email notification alert to monitor whether offline form is imported successfully by Master.

Scheduled report can be access from ≡ in certificates/documents overview page

Click on ⊕ to add schedule report.
And select "certificate offline form"
(Refer to Section 7 for more details)

6.1 Customize Offline Form

Offline form can be customized to reflect the list of certificate/document according to your requirement.

Click on ☰ in certificates/documents overview page and access to settings
Checked on the certificates you wish to include in the offline form
(Refer to Section 1.10 for more details)
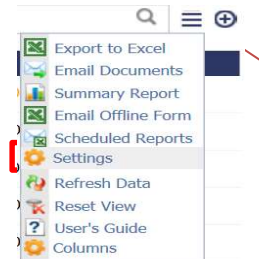
7. Scheduled Reports

The certificate module will generate a weekly email notification which lists all the certificates which are due for renewal.

You can subscribe to the scheduled reporting by choosing the actions menu then selecting Scheduled Reports
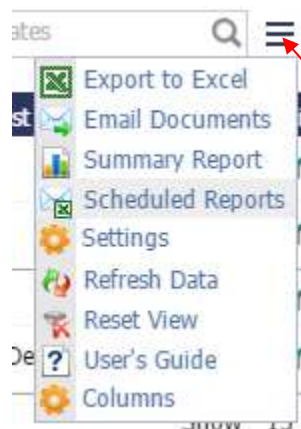
Also, you can access the Scheduled Reports by selecting "Account" and then Scheduled Reports
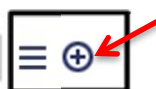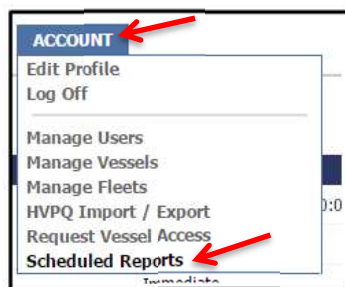
Select the "ADD NEW" button

Select your module you wish to create the scheduled report from and then select the report
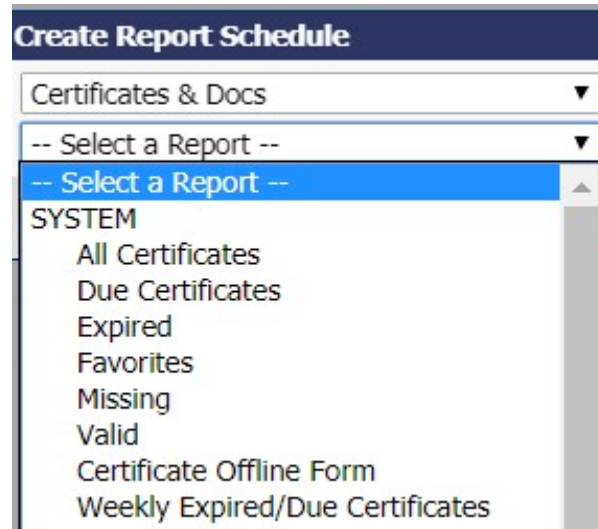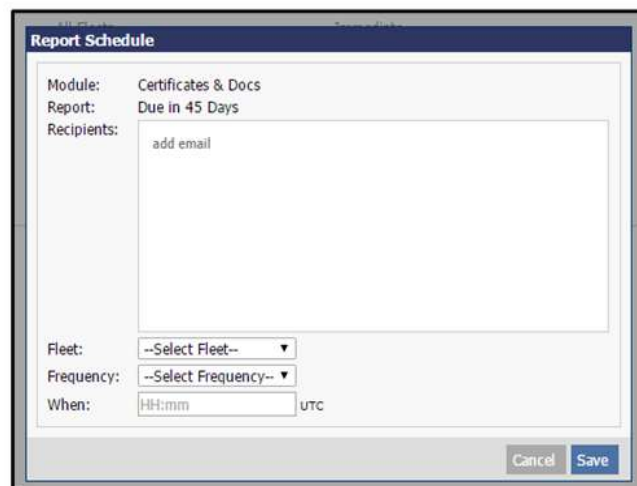
Enter your email and frequency you wish to receive the reports

7. Frequently Asked Questions (FAQ)

Question:	I really messed up the sorting a filtering of one of the views, is there a way to reset it back to its original settings?
Answer:	Yes, click the 'Actions' button and select 'Reset View'
Question:	How do I stop another company from getting the certificate notification emails?
Answer:	If you have granted another company access to your vessel and they have the rights to access the certificate module for your vessel then they are entitled to request the weekly notification email.

8. Terms & Definitions

Filtering	To select data. Filters use patterns (masks) against which all data are compared and only matching data are "passed through," hence the concept of a filter.
Sorting:	Sorting is any process of arranging items in some sequence and/or in different sets, and accordingly, it has two common, yet distinct meanings: # ordering: arranging items of the same kind, class, nature.
Grid:	The main certificate page which lists all the certificates for your fleet.
Views:	Each View contains its own set of columns, filtered data and sort order.