FLEET REPORT MODULE USER'S GUIDE

Version 1.4 (Sep 3, 2018)

Table of Contents

Contents

Change Log

Version	Date	Description
1.0	May 25, 2012	Initial draft
1.1	Jun 5, 2012	Published
1.2	Apr 28, 2014	Updated Template
1.3	May 2, 2016	Updated content to reflect enhancements made to the module, scheduled reports, TOC formatting updates

Introduction

<u>Purpose</u>

This document outlines the features of the Fleet Report 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 Fleet Report module.

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

1. Main Fleet Report Page

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

1.1 Overview

The below image is a screen-shot of the main Fleet Report 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 data for your fleet.

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 'Fleet List' drop-down 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 Fleet Reports" for more information.

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

Email Report:
Emails the fleet report in Excel format.

Export to Excel:
Exports the fleet report to Excel

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

Manage Fleet:
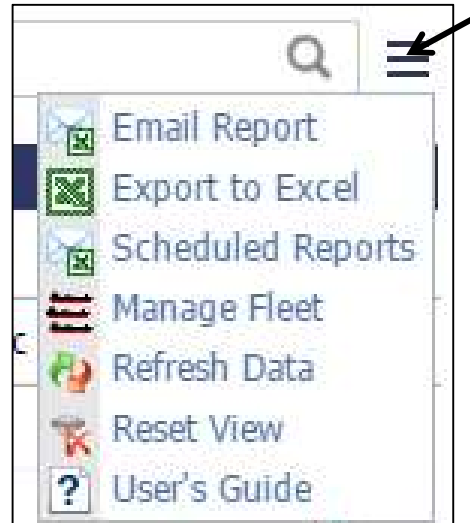Used to manage the individual fleets under your account.

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 Fleet Report module.

1.2 Selecting Views

The "Fleet List" drop-down menu allows you to select different fleet reports that you have setup in the system. By default, the system provides one report called 'Fleet List':

The next section explains how you can create your own fleet reports.
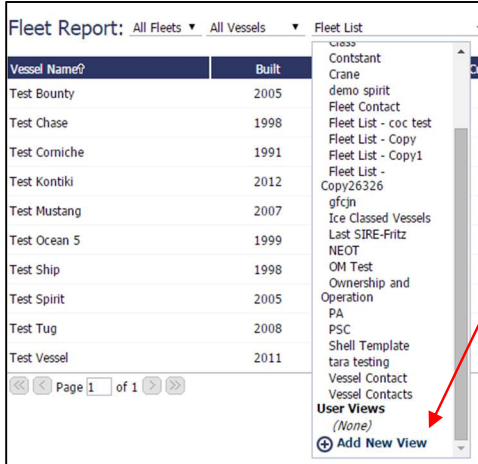
1.3 Creating Custom Fleet Reports

In addition to the default 'Fleet List' View, the Fleet Report module allows you to create our own custom reports.

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.
- **User Views:** Only visible under our login1

Click the 'Add New View' link to add a new Company or User view.

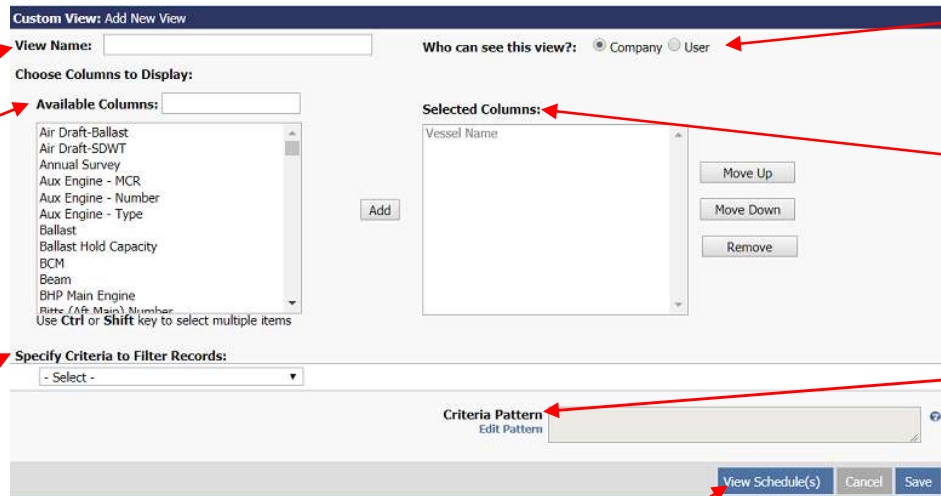The 'Add New View' page will now be displayed:

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.

View current email notifications that are setup

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 does not match it will display an error.
- The number of criteria entered has to 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
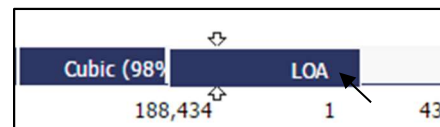- (1 and 2) or (3 and 4)

1.4 Column Selection

Column selection in the fleet report module is not available from the main page, you have to setup your column selection by creating or editing a fleet report you have created.

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.
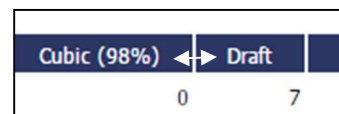
1.6 Column Resizing

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.

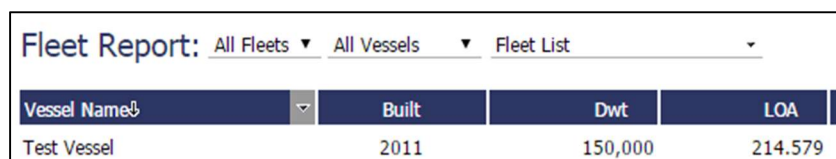Each view will have its own column ordering which can be customized by each user.

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 (descending order).

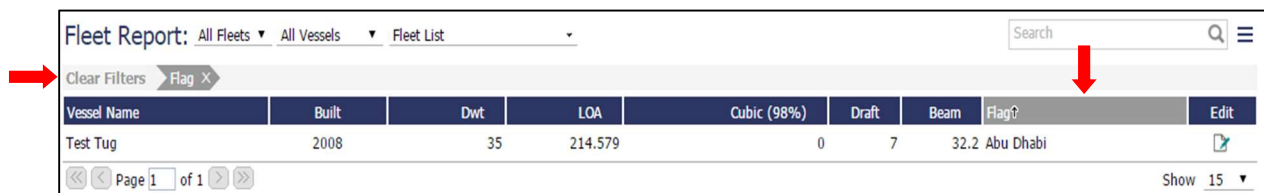| Fleet Report: All Fleets ▾ All Vessels ▾ Fleet List ▾			
Vessel Name↧	Built	Dwt	LOA
Test Vessel	2011	150,000	214.579

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-blue 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.

2. Fleet Report Details

The Fleet Report 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 fleet report details page for the selected vessel.

Edit: Test Kontiki		
Delivery date as recorded in Form A or Form B Q1.8.3 of the IOPPC	May 05, 2012	📅
Summary Deadweight (SDWT)	350000	Metric Tonnes
Grand Total Cubic Capacity (98%)	161409.3	Cu. Metres
Summer Draft	15	Metres
Length overall (LOA)	248.965	Metres
Beam (extreme breadth)	32.2	Metres
Flag	Malta	▼
	Cancel	Save

You can edit data on this screen which will update the system and all the questionnaires that use these questions.

3. 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 fleet report page which lists all the vessels in your fleet.
Views:	Each View contains its own set of columns, filtered data and sort order.