



# Marine Facilities Planning Cruise Planning Introduction

The screenshot shows the homepage of the Marine Facilities Planning (MFP) website. The header includes the MFP logo and navigation links for 'Request an account', 'About', and 'Schedule'. The main content area features a 'Welcome to Marine Facilities Planning' message and a login form titled 'Enter the system' with fields for 'Email' and 'Password', and buttons for 'Forgot Password' and 'Login'. Below the main content is a row of partner organization logos: NSTI, ONR, USGS, BOPB, BOEM, and the Coast Guard. A footer section contains a registration notice and a link to request an account or login.

**MFP Marine Facilities Planning** [Request an account](#) [About](#) [Schedule](#)

Welcome to  
**Marine Facilities Planning**

This website allows scientists to request ship time on the vessels of the U.S. Academic Research Fleet.

**Enter the system**

Email

Password

[Forgot Password](#) [Login](#)

In order to apply to use these marine facilities you must be a registered user of the Marine Facilities Planning Website.

[Please request an account or login above](#)



## Goals

- Overview of MFP
- Understand Workflows
- Overview of Cruise Planning capabilities

## BREAK

- Learn to navigate through MFP
- Test the Generic Cruise Planning Workflow



## History of MFP

- The Marine Facilities Planning is a joint NIOZ, NERC and Maas Software Engineering
- The initial project was called “Track and Trace” and was originated in 2011 by NIOZ
  - Goal: Comply with Customs Warehouse Regulations > Equipment tracking
- **MFP today:** Modular Multi Tenant System to facilitate an integrated cruise planning process



# Marine Facilities Planning Tool - Users



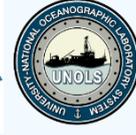
marinefacilitiesplanning.com



marinefacilitiesplanning.com



maps.csiro.au



mfp.us



Natural Environment Research Council

marinefacilitiesplanning.com



Australian Government

Department of the Environment and Energy  
Australian Antarctic Division

aad-  
mfp.org



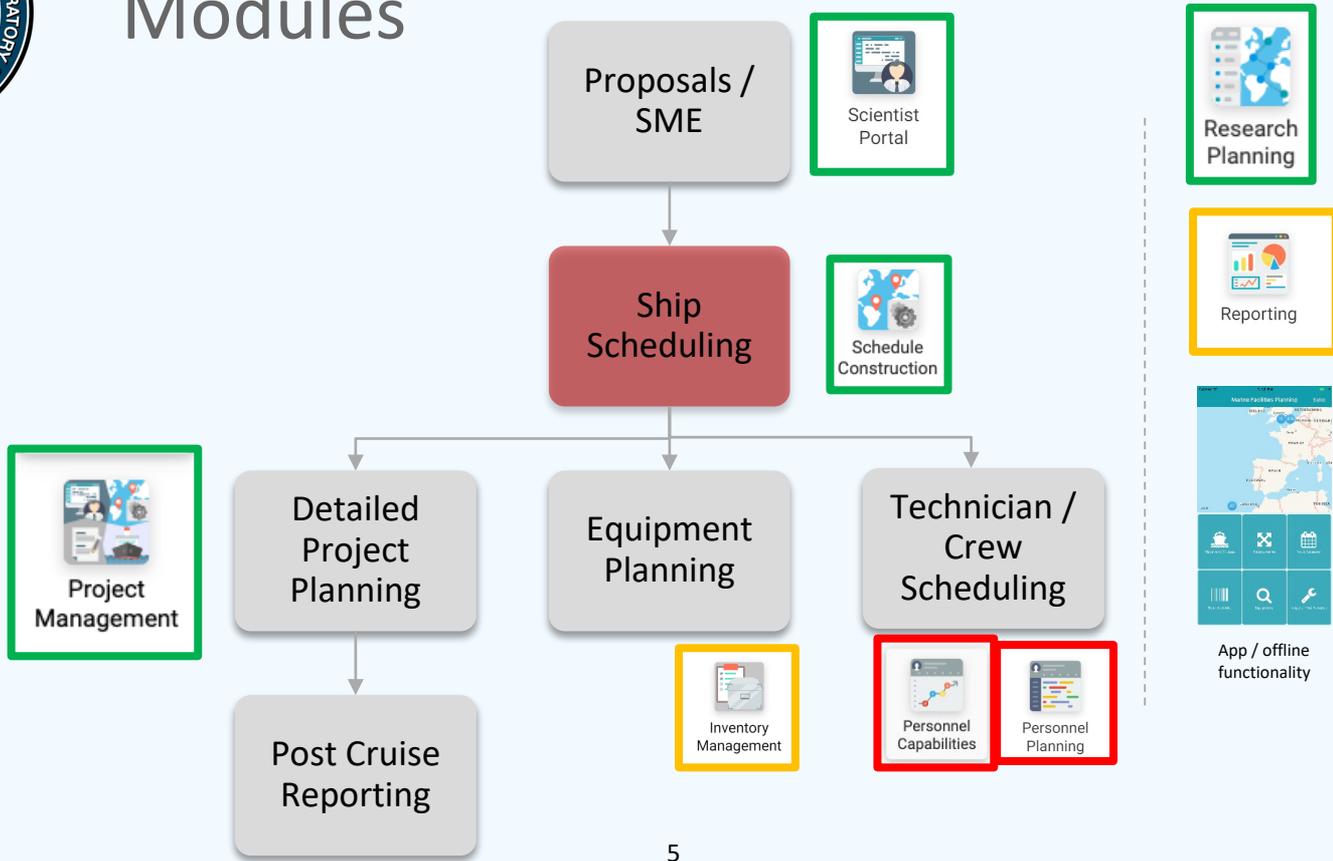
mfp-ksa.org



SCHMIDT  
OCEAN  
INSTITUTE



# Modules





## What is a Workflow?

### *MFP Workflow:*

*A series of steps a project must follow.*

Each step in the workflow is triggered as the user progresses through the process.

Steps can have precursors, alerts, deadlines, and people assigned.



# Big Picture U.S. ARF WORKFLOW

The basic steps that need to happen as we plan cruises

## SME & Scheduling (what STRS used to do)

[UNOLS Community]

Request  
Ship  
Time

- Complete SME Form
- Submit SME Form

[UNOLS Community]

Ship  
Scheduling

- Schedules Created
- Schedules Published

SME = Ship-Time & Marine Eqp  
(how the PIs request ship time)

## Cruise Planning & Post Cruise Assessment

[Institution Specific]

Cruise  
Planning

- Submit Info
- Meetings
- Cruise Participants
- Rad/Haz
- Etc.

[UNOLS Community]

Post-  
Cruise

- PCAR
- NDSF PCAR
- EEZ MSR Reports



# Cruise Planning/PCA Workflow

Institutional Specific

Broken down into 3 sections:

Section	Description	Customizable or Fixed?
Cruise Planning	Cruise Participants, Institutional Specific Cruise Planning Steps & Questions	Customizable
Cruise Itinerary	Finalize Schedules	Fixed
Post Cruise	PCARs, MSR EEZ Reports, etc.	Fixed



## Cruise Planning/PCA Workflow (Generic)

1. Diplomatic Clearance Status
2. Submit Diplomatic Clearance
3. Radioisotope Usage
4. Detailed Cruise Requirements Form
5. Attachments
6. Cruise Planning Meeting 1 & 2
7. Upload Ship's Deck Plan
8. Hazmat/Rad Waste
9. Cruise Participants
10. Berthing Plan

[Institution Specific]



**Customizable  
per institution!**



# Cruise Planning Workflow Template

For each **Institutional Workflow**, the operator

- **Decides which Steps & what questions** to ask
- **Assigns Roles** - Project Admin, Local Planner, Local Support Staff

For each **Step** in the workflow, you can assign

- Who is responsible (either a Role or a specific person)
- Predecessors (which steps must happen first)
- Time Rules (due dates)
- Email Rules/Notifications



# Cruise Planning Workflow Template

## Setting Workflow Roles

Project Management > Cruise Project Management - Generic

WORKFLOW PROCESS | EMAIL NOTIFICATIONS | POST CRUISE ASSESSMENT

**Project Roles**

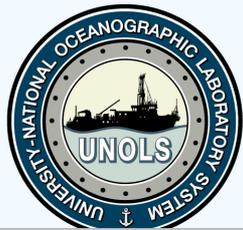
- Scientist is the scientist of the workflow.
- Chief Scientist is the chief scientist of the workflow.
- Science Party Technical Lead is the science party technical lead of the workflow.
- Project Administrator administers the project.
- Local Planner is assigned by the project administrator. The current Local Planner is: Proctor Planner
- Local Support Staff is assigned by the project administrator. There is currently no Local Support Staff for this workflow

**Project Dates**

- planned mobilisation date
- planned sail date
- planned docking date
- planned demobilisation date

Name	Responsibility	Predecessors	Time rules	Email rules (view all)
1. SCHEDULE CONSTRUCTION				
Set by the SME	Staff		<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
2. CRUISE PLANNING				
Diplomatic Clearance	Local Planner		<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Cruise Participants	Scientist		<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Programmed Application Costs		Programmed Application Costs	<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Programmed Application Costs		Programmed Application Costs	<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Cruise Planning Meeting	Scientist	Edit Draft Supply Agreement	<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
3. POST CRUISE				
Complete Post Cruise Assessment	Scientist	Cruise Planning Meeting	<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Review Post Cruise Assessment	Project Administrator, UNOLS Staff	Complete Post Cruise Assessment	<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>

**Set by the Operator**



# Cruise Planning Workflow Template

Name	Responsibility	Predecessors	Time rules	Email rules (view all)
<b>1. CRUISE PLANNING</b>				
Cruise Participants	PI, Project Co-Editor, CO-PIs		<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Detailed Cruise Requirements Form	PI, Project Co-Editor, CO-PIs		<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Diplomatic Clearance Status	Local Planner		<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Attachments	PI, Project Co-Editor, CO-PIs		<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Cruise planning meeting	PI, Project Co-Editor, CO-PIs		<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Submit diplomatic clearance application		Diplomatic Clearance Status	<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Berthing Plan	PI, Project Co-Editor, CO-PIs	Detailed Cruise Requirements Form	<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Hazmat/Radioisotope Waste	Local Planner	Detailed Cruise Requirements Form	<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Upload ship's deck plan	Local Planner	Detailed Cruise Requirements Form	<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>
Cruise planning meeting 2	Project Administrator, PI, Project Co-Editor, Science Party Technical Lead, CO-PIs	Cruise planning meeting	<a href="#">Edit time rules</a>	<a href="#">Edit email rules</a>



## Cruise Planning Workflow Template

# Setting Step Responsibility & Predecessors

Responsibility – a Role or a specific person

Cruise Participants

PI X Project Co-Editor X X

CO-PIs X |

Email Notifications

Recipients

- Responsible User(s)
- Scientist
- Chief Scientist
- Science Party Technical Lead
- UNOLS Staff
- Project Administrator
- Local Planner
- Local Support Staff
- Rienk Admin
- Dale Barbara
- Elizabeth Brenner
- User California

## Predecessors

1. CRUISE PLANNING	
Cruise Participants	PI, Project Co-Editor, CO-PIs
Detailed Cruise Requirements Form	PI, Project Co-Editor, CO-PIs
Diplomatic Clearance Status	Local Planner
Attachments	PI, Project Co-Editor, CO-PIs
Cruise planning meeting	PI, Project Co-Editor, CO-PIs
Submit diplomatic clearance application	
Berthing Plan	PI, Project Co-Editor, CO-PIs
Hazmat/Radioisotope Waste	Local Planner
Upload ship's deck plan	Local Planner

- Cruise Participants
- Detailed Cruise Requirements Form
- Diplomatic Clearance Status
- Attachments
- Cruise planning meeting
- Submit diplomatic clearance application
- Berthing Plan
- Hazmat/Radioisotope Waste
- Upload ship's deck plan
- Cruise planning meeting 2
- Register Mobilization Start Date
- Register Sail Date

Predecessors must be SUBMITTED for the next step to open



# Cruise Planning Workflow Template

## Setting Step Time Rules

**Time rules**

- Type - ▼

- Type -
- Fixed date
- Relative to workflow date

**Time rules**

Relative to workflow date ▼

---

0 days

After ▼

---

- Date - ▼

- Date -
- planned mobilization date
- planned sail date
- planned docking date
- planned demobilization date



# Cruise Planning Workflow Template

## Creating Email Notifications

### ✉ Email Notifications

Recipients

Recipients can be a role or a specific person.

SEND NOTIFICATION ON

Activation of Step

Due Date

Finish of step

Fields that draw information from MFP



may be used in the notification email.  
replaced with the actual information.

{stepname} {reference\_number} {workflowname} {duedate} {url} {responsible\_user} {workflowowner} {date}  
{createdate} {ship} {funding}

Subject {stepname}

{responsible\_user} has submitted SME {reference\_number} for the {workflowname} project.

Message

This SME is requesting the  
{ship}  
and is requesting funding from  
{funding}

Click here to view the SME: {url}.

SAVE



## MFP Marine Facilities Planning

Alice Doyle has submitted SME21/180 on 6/21/2021.

This SME is requesting the

- RV Sikuliaq
- RV Thomas G. Thompson
  - RV Atlantic Explorer
  - RV Endeavor

and is requesting funding from

- Gulf of Mexico Research Initiative (Funded)

Click here to view the SME:

<https://mfp.us/ProjectManagement/Workflow/ViewStep/1002>.



## MFP Marine Facilities Planning

Dear Alice Doyle,

We are excited to let you know that your project, RVTEC Cruise Planning Test 20/098 has been scheduled on the • RV Thomas G. Thompson.

If your project's funding with • National Oceanic and Atmospheric Administration/ (Funded) is still Pending, please be sure to update your SME's funding status when it is confirmed. This can be updated here: <https://mfp-unols-testsystem.org/ProjectManagement/Workflow/ViewStep/497>.

Please consult the Vessel Scheduler/Operator to proceed with cruise planning.



# The Science Portal

## PI View

Blue Font shows PI steps that need to be completed.  
If a step turns red, it means it is overdue.



Scientist Portal

Alice Doyle

HOME

MY EQUIPMENT

VOYAGES AND CRUISES

MY PROFILE

HELP & DOCUMENTATION

Hello Alice Doyle,

Welcome to your personal UNOLS portal. Here you can apply for ship time and use of national marine facilities and/or pooled equipment. You can also manage your personal equipment.

To see an overview of the scheduled cruises have a look at the UNOLS [Schedules](#)

+ New Application

Active Applications

Archive

Project that is already scheduled.

SME that hasn't been completed



21/400 - RVTEC Cruise Planning Test - NEW

[view workflow](#)

▲ The following requires your action:

- Detailed Cruise Requirements Form
- Diplomatic Clearance Status
- Cruise Participants
- Cruise planning meeting
- Attachments
- Register Mobilization Start Date



21/398 - RVTEC Cruise Planning Test

[view workflow](#)

▲ The following requires your action:

- Edit Draft Supply Agreement
- Diplomatic Clearance Status
- Cruise Participants
- Cruise planning meeting
- Attachments
- Register Mobilization Start Date



21/389 - New Application

[view workflow](#)

▲ The following requires your action:

- Complete cruise request form

Duplicate



21/375 - werwe

[view workflow](#)



### Cruise Application progress

Cancel Application

Name	Responsibility	Status	Deadline	Completed	Action
1. CRUISE PLANNING					
Cruise Participants	You	Active (Finish)			Open
Diplomatic Clearance Status	You , Loren Tuttle, Meegan Corcoran	Active (Finish)			Open
Edit Draft Supply Agreement	You	Active (0/17) (Finish)			Open
Attachments	You	Active (Finish)			Open
Cruise planning meeting	You	Active (Finish)			Open
Submit diplomatic clearance application		Pending			
Berthing Plan		Pending			
Hazmat/Radioisotope Waste	-	Pending			
Upload ship's deck plan	You	Pending			
Cruise planning meeting 2	You , Loren Tuttle, Meegan Corcoran	Pending			

Active Steps are Open

Pending are steps that are not yet available.



# Project Management Module

## What the Operator sees

You can find a project by using the Search function at the top of the columns in Project Management

The screenshot shows the 'Project Management' interface. At the top, there is a header with the UNOLS logo, 'MFP | Project Management', and a user profile for 'Alice Doyle'. Below the header, there are navigation options: 'Workflows', '+ New', 'Templates', and 'Bulk Actions'. The main content is a table with the following columns: Identifier, Alternate ID, Workflow, Name, Initiator, Affiliation, Stage, Funding, and Planning Status. The first row of the table has a red arrow pointing to the 'Identifier' cell, which contains the text '21/400'. The second row of the table contains the following data: Initiator: Alice Doyle, Affiliation: UNOLS, Stage: Detailed Cruise Requirements Form, Diplomatic Clearance Status, Cruise Participants, Cruise planning meeting, Attachments, Register Mobilization Start Date, Funding: NOAA/National Marine Fisheries Service.

Identifier	Alternate ID	Workflow	Name	Initiator	Affiliation	Stage	Funding	Planning Status
<input type="checkbox"/>		-All-		-User-	-Affiliati...		All	
<input type="checkbox"/>	21/400	Cruise Project Management - UW	RVTEC Cruise Planning Test - NEW	Alice Doyle	UNOLS	Detailed Cruise Requirements Form Diplomatic Clearance Status Cruise Participants Cruise planning meeting Attachments Register Mobilization Start Date	NOAA/National Marine Fisheries Service	

Click on the ID to see the workflow details



# Project Management Module

## What the Operator sees

You will see the steps that are available to you.

You can edit those that you have permission to access through the Workflow Roles

MFP | Project Management Alice Doyle

Project Management > Workflow 21/400 RVTEC Cruise Planning Test - NEW

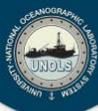
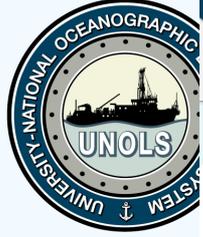
Name	Responsibility	Status	Deadline	Completed	Action
<b>1. CRUISE PLANNING</b>					
Cruise Participants	You	Active (Finish)			Open
Detailed Cruise Requirements Form		Active (0/17) (Finish)			Open
Diplomatic Clearance Status		Active (Finish)			Open
Attachments	You	Active (Finish)			Open
Cruise planning meeting	You	Active (Finish)			Open
Submit diplomatic clearance application		Pending			
Berthing Plan	You	Pending			
Hazmat/Radiation		Pending			
Upload ship's deck plan	You	Pending			
Cruise planning meeting 2	You, Loren Tuttle, Meegan Corcoran	Pending			
<b>2. CRUISE ITINERARY</b>					
Register Mobilization Start Date		Active (Finish)			Register
Register Sail Date		Pending			
Register Docking Date		Pending			
Register Demobilization End Date		Pending			

**Active Steps are Open**

**Pending are steps that are not yet available.**



- BREAK TO APP / DEMO



34/520 MFP-ASV-ZX (3/3)

21/220 MFP-BSE-NP (0/3)

22/720 MFP-VSV-ZX (0/3)



Seattle (Washington) - United States



Los Angeles (California) - United States



Start of loading:

Sail date:

Docking date:

End of loading:

1/13/2023

2/7/2023

Personal Information

Medical Information

Documents (0/4)

Submit

General Information

Title

Given names as shown on passport

John

Surname

Doe

Role

Scientist

Pronouns

Affiliated Institution

UNOLS

Date of birth

TWIC Holder

-Y/N-

Do you have any private concerns related to shipboard sleeping arrangements, lodging, or a preferred roommate?

Type of visa

Contact Information

Address line 1

Address line 2

Town/City

Postal code

Country

Telephone 1

Telephone 2

Visa Information

Type of visa

Passport Information

Nationality

France

Passport/ID number

Country of origin

Laos

Place of birth

Sex as listed on passport/ID

Male

Expiry date

Copy of passport/ID

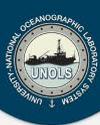
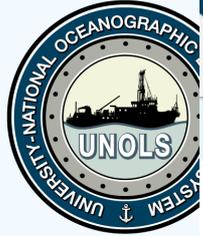
john\_doe\_passport\_copy.png (323 MB)

Delete and Reupload

Save this information for future cruises

By saving this form you agree to the collection and processing of your personal data

Save And Continue



34/520 MFP-ASV-ZX (3/3) 21/220 MFP-BSE-NP (1/3) 22/720 MFP-VSV-ZX (0/3)

Seattle (Washington) - United States → Los Angeles (California) - United States

Start of loading: - Sail date: 1/13/2023 Docking date: 2/7/2023 End of loading: -

Personal Information Medical Information Documents (0/4) Submit

**Medical**

Dietary requirements

Other dietary details

Alergies

-Y/N-

Medical issues

-Y/N-

Medications

Recent hospitalizaions

Past medical/surgical history

Additional notes

Copy of Medical Insurance Card

File not selected

**Next of Kin**

Emergency contact

Relationship

Email

Telephone

Save this information for future cruises

By saving this form you agree to the collection and processing of your personal data



Personal Information ✓ Medical Information ✓ Documents (1/4) Submit

Thomson Aft Desk Plan Required

Thomson Desk Plan with USBL

Please download this file to your computer, and fill out all the fields required

Thomson Aft Desk Plan.pdf (323 MB)

Please upload the document

Choose File File not selected

TN Aft Desk Plan

Thomson Desk Plan with USBL

Please download this file to your computer, and fill out all the fields required

Thomson Aft Desk Plan.pdf (323 MB)

Please upload the document

Thomson Aft D...pdf (323 MB) Delete and Reupload

Internet Use Policy Required

Details on R/V Oceanus internet connections, bandwidth limitations, and suggestions for configuring your devices for at-sea use

Please download this file to your computer, and read the information

Thomson Aft Desk Plan.pdf (323 MB)

Please confirm that you have read the information

As a cruise primary, I certify that I have read and understand this document on behalf of the science party

Internet Use Policy Required

Details on R/V Oceanus internet connections, bandwidth limitations, and suggestions for configuring your devices for at-sea use

Please download this file to your computer, and read the information

Thomson Aft Desk Plan.pdf (323 MB)

Please confirm that you have read the information

As a cruise primary, I certify that I have read and understand this document on behalf of the science party

Save this information for future cruises

By saving this form you agree to the collection and processing of your personal data

Go Back

Continue



Personal Information ✓
Medical Information ✓
Documents (4/4) ✓
Submit

Personal Information

<b>General Information</b>		<b>Contact Information</b>	
Given names as shown on passport:	John Leslie	Address Line 1:	Lafontaine 4 av., Chez Mireille Copeau Apartment 3
Surname:	Doe	Address Line 2:	CAUDOS 53
Role:	Scientist	Town/City:	Etretat
Pronouns:	Mr.	Postal code:	533380
Affiliated Institution:	UNOLS	Country:	France
Date of birth:	27-03-1990	Telephone 1:	01 982 345 78
TWIC holder:	123456	Telephone 2:	01 456 345 11
<b>Passport Information</b>			
Nationality:	France		
Passport/ID number:	JF 3456 23		
Country of origin:	Laos		
Place of birth:	Vientiane, Laos		
Sex as listed on passport/ID	Male		
Expiry date:	27-03-2025		

Medical

Documents

Uploaded documents Read and confirmed

- Thomson Aft Desk Plan.pdf (323 MB)
- Internet Use Policy.pdf (323 MB)
- Thomson Aft Desk Plan.pdf (323 MB)

Submit



# Questions?

[alice@unols.org](mailto:alice@unols.org)

970-403-3874

See reference slides below of other possible Workflow components.



## Project Management

CHROME TEST [alicepdoyle@gmail.com](mailto:alicepdoyle@gmail.com)

- LOGIN – Navigation button -
- Shows all of the SMEs in the system + all UW Cruise Planning
- Can search by any number of fields
  - Status – when SME is scheduled, it is deemed “Complete”
- Click on Project to see the workflow

IF YOU CAN'T FIND SOMETHING check your filters.



# Safari – [adoyle33@uw.edu](mailto:adoyle33@uw.edu)

- Science Portal
  - Blue Font shows items that need doing now.
  - Click the the workflow "View Workflow" to see all steps.
    - Active (Blue Font)
    - Pending (not visible yet).



# Detailed Cruise Requirements Form

## Use LIVE - Kamphaus

- Cruise Questionnaire – and if that is a term we all know we can keep that.
- SME on steroids.
- All info pulled from the SME
- **Cruise Location** – upload/download coordinates
- **Questions in Portable Equipment**
  - Click and see questions
  - Customizable per ship
- LOOK AT
  - Portable Vans
  - Coring
  - CTD
  - MOCNESS



## Portable Equipment Cont.

- **Cruise Checklist** - misc. stuff that didn't fit under equipment
- **The Radioisotope step** will be removed from this form and added as its own step in the workflow.
- They can Save and move forward but must complete required.
- **Submitting LOCKS** some items (like this) – save but don't submit.



## Diplomatic Clearances

- 2 Steps
  - List the countries and tracks the permit status
  - Submit the info – submitting is pending until you list which countries.

## Attachments –

- Pretty straightforward.

## Cruise Planning Meeting

- Add Date and any notes.



## Upload Ship's Deck Plan

- Can upload the vessel diagrams to the system for the PIs to see.
- They (or the operator) can add what they would like to see

## Hazmat/Rad Waste

- A list with instructions that this is their problem
- more a step to make folks aware
- Could see where this wouldn't be what everyone wants.



## Participant Portal

- PI updates the list – either via import or independently
- Notifications are sent directly to the participants
- PI can see the progress and send reminders.
- Each person has their own email link

[GO TO EMAIL LINK](#)

[GO TO MOCK UP](#)



## Research Planner

- Tool to help plan research cruises
- Select Ports
- Select Stations – on map or upload
  - ADD Station to MX EEZ and MMPA
  - Add Research Area
- Change
  - Ship Speed
  - Time on Station, etc

Rolled up to show the time required for the cruise.



- GO BACK TO SLIDES