Marine Facilities Planning
Cruise Planning Introduction
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
Proposals / SME

Ship Scheduling

Detailed Project Planning

Equipment Planning

Technician / Crew Scheduling

Post Cruise Reporting

SME

Scientist Portal

Schedule Construction

Inventory Management

Personnel Capabilities

Personnel Planning

Project Management

Research Planning

Reporting

App / offline functionality
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.
The basic steps that need to happen as we plan cruises

SME & Scheduling
(what STRS used to do)

- Complete SME Form
- Submit SME Form

Ship Scheduling

- Schedules Created
- Schedules Published

Cruise Planning & Post Cruise Assessment

[UNOLS Community]

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

[UNOLS Community]

- PCAR
- NDSF
- PCAR
- EEZ MSR Reports

[Institution Specific]

SME = Ship-Time & Marine Eqp
(how the PIs request ship time)
### Cruise Planning/PCA Workflow

**Institutional Specific**

Broken down into 3 sections:

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Customizable or Fixed?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cruise Planning</td>
<td>Cruise Participants, Institutional Specific Cruise Planning Steps &amp; Questions</td>
<td>Customizable</td>
</tr>
<tr>
<td>Cruise Itinerary</td>
<td>Finalize Schedules</td>
<td>Fixed</td>
</tr>
<tr>
<td>Post Cruise</td>
<td>PCARs, MSR EEZ Reports, etc.</td>
<td>Fixed</td>
</tr>
</tbody>
</table>
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

- **Scientist**
  - is the scientist of the workflow.
  - is the chief scientist of the workflow.

- **Chief Scientist**
  - is the science party technical lead of the workflow.

- **Science Party Technical Lead**
  - is assigned by the project administrator. The current Local Planner is Proctor Planner.
  - is assigned by the project administrator. There is currently no Local Support Staff for this workflow.

- **Project Administrator**
  - administers the project.

- **Local Planner**
  - is assigned by the project administrator.

- **Local Support Staff**
  - as assigned by the project administrator. There is currently no Local Support Staff for this workflow.

Set by the SME

Set by the Operator

**Project Dates**
- planned mobilisation date
- planned sail date
- planned docking date
- planned demobilisation date
# Cruise Planning Workflow Template

## 1. CRUISE PLANNING

<table>
<thead>
<tr>
<th>Name</th>
<th>Responsibility</th>
<th>Predecessors</th>
<th>Time Rules</th>
<th>Email rules (view all)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cruise Participants</td>
<td>PI, Project Co-Editor, CO-PIs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Detailed Cruise Requirements Form</td>
<td>PI, Project Co-Editor, CO-PIs</td>
<td></td>
<td>Edit time rules</td>
<td>Edit email rules</td>
</tr>
<tr>
<td>Diplomatic Clearance Status</td>
<td>Local Planner</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attachments</td>
<td>PI, Project Co-Editor, CO-PIs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cruise planning meeting</td>
<td>PI, Project Co-Editor, CO-PIs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit diplomatic clearance application</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Berthing Plan</td>
<td>PI, Project Co-Editor, CO-PIs</td>
<td></td>
<td>Edit time rules</td>
<td>Edit email rules</td>
</tr>
<tr>
<td>Hazmat/Radioisotope Waste</td>
<td>Local Planner</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Upload ship's deck plan</td>
<td>Local Planner</td>
<td></td>
<td>Edit time rules</td>
<td>Edit email rules</td>
</tr>
<tr>
<td>Cruise planning meeting 2</td>
<td>Project Administrator, PI, Project Co-Editor, Science Party Technical Lead, CO-PIs</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Cruise Planning Workflow Template

Setting Step Responsibility & Predecessors

Responsibility – a Role or a specific person

Predecessors must be SUBMITTED for the next step to open
Cruise Planning Workflow Template

Setting Step Time Rules

**Time rules**

- **Type**:
  - Fixed date
  - Relative to workflow date

**Relative to workflow date**

- 0 days

**After**

- Date:
  - Planned mobilization date
  - Planned sail date
  - Planned docking date
  - Planned demobilization date
Recipients can be a role or a specific person.

Fields that draw information from MFP

{stepname} {reference_number} {workflowname} {duedate} {url} {responsible_user} {workflowowner} {date}

Subject

{stepname}

{responsible_user} has submitted SME {reference_number} for the {workflowname} project.

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

Click here to view the SME: {url}.

SAVE
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.
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.
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.

Active Applications | Archive
--- | ---
21/400 - RVTEC Cruise Planning Test - NEW
- 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
- 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
- The following requires your action:
  - Complete cruise request form

21/375 - werwe

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

Project that is already scheduled.

SME that hasn't been completed.
<table>
<thead>
<tr>
<th>Step Description</th>
<th>Responsibility</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cruise Participants</td>
<td>You</td>
<td>Active (Finish)</td>
</tr>
<tr>
<td>Diplomatic Clearance Status</td>
<td>You, Loren Tuttle,</td>
<td>Active (Finish)</td>
</tr>
<tr>
<td>Edit Draft Supply Agreement</td>
<td>You</td>
<td>Active (0/17) (Finish)</td>
</tr>
<tr>
<td>Attachments</td>
<td>You</td>
<td>Active (Finish)</td>
</tr>
<tr>
<td>Cruise planning meeting</td>
<td>You</td>
<td>Active (Finish)</td>
</tr>
<tr>
<td>Submit diplomatic clearance</td>
<td></td>
<td>Pending</td>
</tr>
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</table>

*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.

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.

Active Steps are Open

Pending are steps that are not yet available.
• BREAK TO APP / DEMO
Personal Information

General Information
- Surname: Doe
- Given names as shown on passport: John Leslie
- Role: Scientist
- Affiliated Institution: UNOLS
- Date of birth: 27-03-1990
- TWIC holder: 123456

Passport Information
- Nationality: France
- Passport ID number: JF 3456 23
- Country of origin: Laos
- Place of birth: Vientiane, Laos
- Sex as listed on passport: Male
- Expiry date: 27-03-2025

Contact Information
- Address Line 1: Lafontaine 4 av, Chez Mireille Copeau Apartment 3
- Address Line 2: CAL505 53
- Town/City: Etteret
- Postal code: 533380
- Country: France
- Telephone 1: 01 982 345 78
- Telephone 2: 01 456 345 11

Medical

Documents

Uploaded documents
- Thomson Alt Desk Plan.pdf (323 MB)
- Internet Use Policy.pdf (323 MB)

Read and confirmed
- Thomson Alt Desk Plan.pdf (323 MB)
Questions?

alice@unols.org
970-403-3874

See reference slides below of other possible Workflow components.
- 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.
• Science Portal
  ▫ Blue Font shows items that need doing now.
  ▫ Click 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
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