



**Project Management Module**

# **Quick Start Guide**



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# Introduction

The Project Management module offers an overview of all workflows in the Marine Facilities Planning system for your organisation. Workflows consist of multiple consecutive steps required to complete a specific procedure. For example, a request for ship time and/or use of equipment, or a cruise planning procedure. Each workflow step can have one or more responsible users, deadlines for when the step should be completed, and email notifications sent.

The most important function of the Project Management module is getting and keeping all project stakeholders involved. Guiding users in what they have to do and when to do it. Therefore, this module is linked to other MFP modules. Changes in other modules reflect to the Program Management module and vice versa. Together forming a modular multi-tenant system to facilitate an integrated cruise planning process.

This document gives a overview of the different Project Management sections, basic features and how to use them, and where to find configuration options for organisation specific setup.

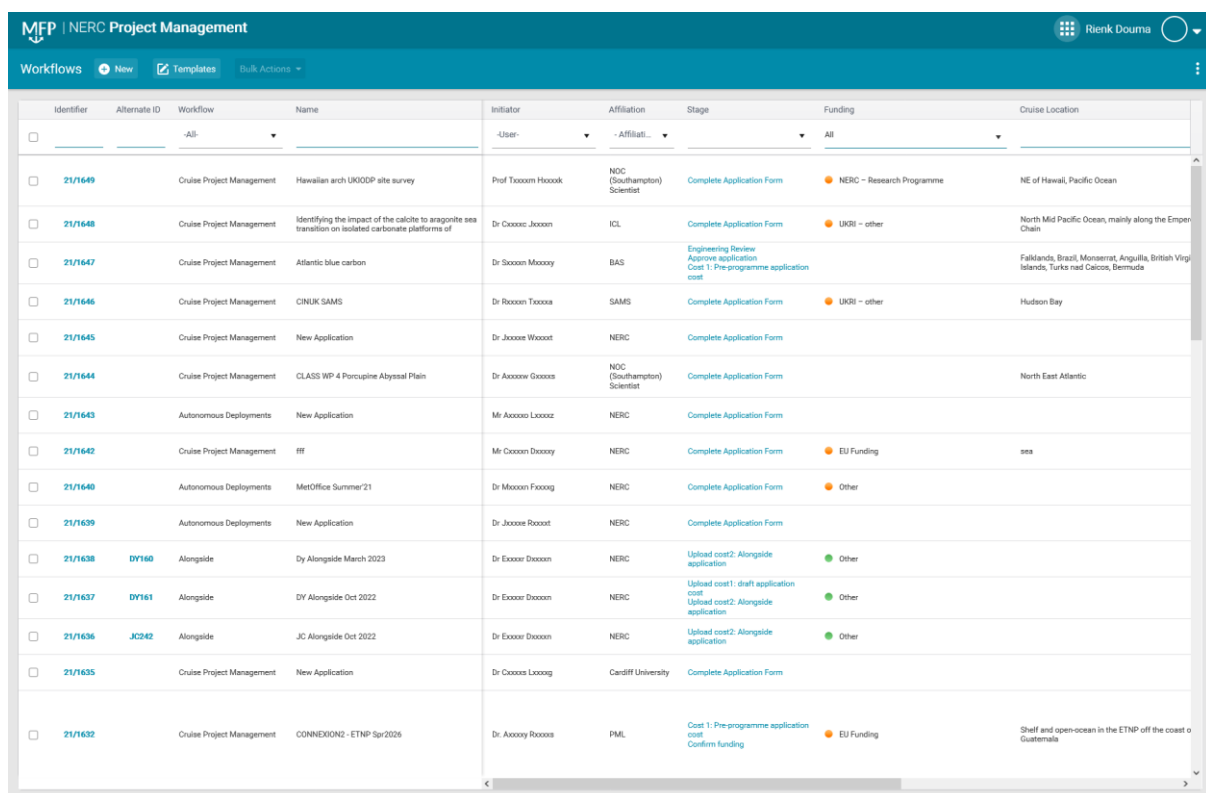
# 1 Project Management Main Screen

The image below shows a typical main screen of the Project Management module. At the top-left you will find controls to start a new workflow, edit workflow templates, and bulk action for a selection of workflows. At the top-right a menu which, among else, gives access to the Ground Data section. Ground Data contains different configuration options regarding workflow content.

The table shows all workflows that are currently active, with the workflow identifier in the first column. This identifier is automatically generated when a new workflow is started. Although you can start new workflows from the screen, this not common practice. In most cases a new workflow is started by a scientist when creating a new application from their Scientist Portal, or a follow-up workflow is automatically created when for example, a submitted application is scheduled, and the cruise planning stage starts.

The list of workflows can be sorted on column by clicking the column header or filtered using the filter options at the top of each column.

Clicking on the identifier or alternate ID opens that specific workflow.



The screenshot displays the 'MFP | NERC Project Management' interface. At the top, there's a navigation bar with 'Workflows', 'New', 'Templates', and 'Bulk Actions'. A user profile 'Rienk Douma' is visible in the top right. Below the navigation bar is a table with columns: Identifier, Alternate ID, Workflow, Name, Initiator, Affiliation, Stage, Funding, and Cruise Location. The table lists various projects, including 'Hawaiian arch UK00DP alte survey', 'Identifying the impact of the calcite to aragonite sea transition on isolated carbonate platforms of', 'Atlantic blue carbon', 'CINUK SAMS', 'New Application', 'CLASS WP 4 Porcupine Abyssal Plain', 'Autonomous Deployments', 'MetOffice Summer'21', 'New Application', 'Alongside', 'DY Alongside Oct 2022', 'JC Alongside Oct 2022', 'New Application', and 'CONNEXION2 - ETNP Spr2026'. Each row includes a checkbox, a workflow identifier, an alternate ID, a workflow name, a project name, an initiator, an affiliation, a stage, a funding source, and a cruise location.

Identifier	Alternate ID	Workflow	Name	Initiator	Affiliation	Stage	Funding	Cruise Location
<input type="checkbox"/>	21/1649	Cruise Project Management	Hawaiian arch UK00DP alte survey	Prof Toxoom Hooook	NOC (Southampton) Scientist	Complete Application Form	NERC - Research Programme	NE of Hawaii, Pacific Ocean
<input type="checkbox"/>	21/1648	Cruise Project Management	Identifying the impact of the calcite to aragonite sea transition on isolated carbonate platforms of	Dr Coxoom Jooxon	ICL	Complete Application Form	UKRI - other	North Mid Pacific Ocean, mainly along the Emperor Chain
<input type="checkbox"/>	21/1647	Cruise Project Management	Atlantic blue carbon	Dr Sooxom Moosoy	BAS	Engineering Review Approve application Cost 1: Pre-programme application cost		Falklands, Brazil, Monserat, Anguilla, British Virgin Islands, Turks and Caicos, Bermuda
<input type="checkbox"/>	21/1646	Cruise Project Management	CINUK SAMS	Dr Roosom Toosoa	SAMS	Complete Application Form	UKRI - other	Hudson Bay
<input type="checkbox"/>	21/1645	Cruise Project Management	New Application	Dr Joosom Woosot	NERC	Complete Application Form		
<input type="checkbox"/>	21/1644	Cruise Project Management	CLASS WP 4 Porcupine Abyssal Plain	Dr Asoosom Gooosom	NOC (Southampton) Scientist	Complete Application Form		North East Atlantic
<input type="checkbox"/>	21/1643	Autonomous Deployments	New Application	Mr Asoosom Looosom	NERC	Complete Application Form		
<input type="checkbox"/>	21/1642	Cruise Project Management	IFF	Mr Coxoom Doosoy	NERC	Complete Application Form	EU Funding	sea
<input type="checkbox"/>	21/1640	Autonomous Deployments	MetOffice Summer'21	Dr Moosom Fooosom	NERC	Complete Application Form	Other	
<input type="checkbox"/>	21/1639	Autonomous Deployments	New Application	Dr Joosom Roosot	NERC	Complete Application Form		
<input type="checkbox"/>	21/1638	DY160	Alongside	Dr Exosom Doosom	NERC	Upload cost2: Alongside application	Other	
<input type="checkbox"/>	21/1637	DY161	Alongside	Dr Exosom Doosom	NERC	Upload cost1: draft application cost Upload cost2: Alongside application	Other	
<input type="checkbox"/>	21/1636	JC242	Alongside	Dr Exosom Doosom	NERC	Upload cost2: Alongside application	Other	
<input type="checkbox"/>	21/1635	Cruise Project Management	New Application	Dr Coxoom Looosom	Cardiff University	Complete Application Form		
<input type="checkbox"/>	21/1632	Cruise Project Management	CONNEXION2 - ETNP Spr2026	Dr Asoosom Roosom	PML	Cost 1: Pre-programme application cost Confirm funding	EU Funding	Shelf and open-ocean in the ETNP off the coast of Guatemala

Fig 1. Example of the Project Management main screen.

## 2 The Workflow Overview

The workflow overview is divided into two sections. To the left basic information such as project roles, project dates and attachments added in workflow steps. Here you can also set the priority. The priority determines the position of this application in the application list within the Programme Construction module. This module is used to schedule all submitted applications.

The table shows the different workflow steps, and for each step the responsible user(s), the status, deadline, the date it was completed and the option to view or open that step.

View button: only available for completed workflow steps.

Open button: only available for active workflow steps.

When a step has the pending status, it will not show a button. Pending means a preceding step has to be completed first before this step becomes active. Predecessors can be configured in the workflow template. See chapter 3.

The active status also shows when a workflow step consists of multiple parts, such as an application form.

Users with admin rights will have the option to rollback or finish a step.

Be careful with these options as they can have great impact. The further a workflow is progressed, the greater the impact and consequence. For example, the rollback option. In the image below there are multiple workflow stages with multiple steps. In the Programme Construction stage, the application is scheduled. And probably, email notifications were sent to users when the application got scheduled. If you would rollback the Complete Application Form step, it will rollback all steps that were completed, thus removing the application from the schedule. This can create a lot of confusion.

MFP | NERC Project Management
Rienk Douma

Project Management >
Workflow
21/1572 Cyber Security Testing

### Project Roles

**Project Initiator** Looxoh Saxooy /  
**Project Co-Editor** Gooxoy Dooxoh /

**Project Manager** N.A. /

Expand ▾

---

**Alternate ID** DV141 /

**Priority** Not Set /

### Project Dates

IMS equipment located at stores quarantine area N.A.  
 IMS dispatch date N.A.  
 planned mobilisation date N.A.  
 planned end date 15/11/2021  
 planned docking date 15/11/2021  
 planned demobilisation date N.A.

### Attachments

	TABLE	GANTT	APP. FORMS	TASKS	PROJECT STRUCTURE		
	Name		Responsibility	Status	Deadline	Completed	Action
# 1. APPLICATION STAGE	Complete Alongside application form		Looxoh Saxooy, Gooxoy Dooxoh	Complete (Rollback)	10/05/2021		<a href="#">View</a>
	Approve Alongside		Esooxr Dooxon	Complete (Rollback)	01/06/2021		<a href="#">View</a>
	Confirm availability of funding		Looxoh Saxooy, Gooxoy Dooxoh	Active (Finish)			<a href="#">Open</a>
	Upload cost1: draft application cost			Pending			
# 2. PROGRAMME CONSTRUCTION	Add Alongside to programme		Esooxr Dooxon	Complete (Rollback)	23/08/2021		<a href="#">View</a>
	Upload cost2: Alongside application			Active (Finish)			<a href="#">Open</a>
	Accept programmed offer		Looxoh Saxooy, Gooxoy Dooxoh	Pending			
# 3. PROJECT PLANNING	Submit diplomatic clearance application			Pending	20/03/2021		
	Upload cost3: Alongside delivery costs			Pending	16/09/2021		
# 4. EQUIPMENT PREPARATION	Equipment in stores/ready for shipping		Tooxoe Vooxon	Pending			
	Current Diplomatic Clearance Status			Pending			
	Dispatch equipment to mobilisation port		Tooxoe Vooxon	Pending			
# 5. CRUISE DELIVERY	Planned Demobilisation end date			Pending			
# 6. POST PROJECT	Upload cost 4: Post project cost			Pending	22/11/2021		
	Close project			Pending	20/05/2022		

*Fig 2. Example of a workflow.*

# 3 Workflow Templates

## 3.1 General Overview and Configuration

The basic structure of workflows is preconfigured and fixed. For example, the steps of a workflow and available project roles. But within this structure it is possible to make adjustments when you have Project Administrator rights. To view and edit a workflow template, click on the Templates button in the Project Management main screen and select the template.

In the left side pane project roles can be assigned to users using the edit option (pencil icon). Not every project role has this edit option. This means that these roles are application dependent, instead of workflow dependent. These project roles are assigned within the application form.

In the table you can make the following adjustments:

- Configure which users are responsible for a step by clicking in the Responsibility column.
- Configure which steps have to be completed before this step becomes active by clicking in the Predecessors column.
- Set a deadline for when the step has to be completed.
- Configure email notifications (see chapter 3.2).
- Delete a step. **Be aware that you can only delete a step and not add a step or undo this action.**
- Configure the content of the Post Cruise Assessment step (see chapter 3.3).

The screenshot displays the 'MFP | NERC Project Management' interface. The top navigation bar includes the MFP logo, the text 'Project Management', and a user profile for 'Rienk Douma'. Below the navigation bar, there's a sidebar on the left with 'Project Roles' and 'Project Dates'. The main content area is titled 'Workflow Process' and shows a table of workflow steps for the 'Alongside' template. The table has columns for Name, Responsibility, Predecessors, Time rules, and Email rules (view all). The steps are organized into six sections: 1. APPLICATION STAGE, 2. PROGRAMME CONSTRUCTION, 3. PROJECT PLANNING, 4. EQUIPMENT PREPARATION, 5. CRUISE DELIVERY, and 6. POST PROJECT. Each step includes a name, a responsible role, a predecessor step, a time rule, and an email rule.

Workflow Process					
Name	Responsibility	Predecessors	Time rules	Email rules (view all)	
1. APPLICATION STAGE					
Complete Alongside application form	Project Initiator, Project Co-Editor		Edit time rules	Edit email rules	
Approve Alongside	Marine Planning Officer	Complete Alongside application form	Edit time rules	Edit email rules	
Confirm availability of funding	Project Initiator, Project Co-Editor	Approve Alongside	Edit time rules	Edit email rules	
Upload cost1: draft application cost	Project Manager	Confirm availability of funding	Edit time rules	Edit email rules	
2. PROGRAMME CONSTRUCTION					
Add Alongside to programme	Marine Planning Officer	Upload cost1: draft application cost	Edit time rules	Edit email rules	
Upload cost2: Alongside application	Project Manager	Add Alongside to programme	Edit time rules	Edit email rules	
Accept programmed offer	Project Initiator, Project Co-Editor	Upload cost2: Alongside application	Edit time rules	Edit email rules	
3. PROJECT PLANNING					
Submit diplomatic clearance application	Project Manager	Upload cost2: Alongside application	240 before planned sail date	Edit email rules	
Upload cost3: Alongside delivery costs	Project Manager	Upload cost2: Alongside application	60 before planned sail date	Edit email rules	
4. EQUIPMENT PREPARATION					
Equipment in stores/ready for shipping	Logistics Manager	Upload cost2: Alongside application	Edit time rules	Edit email rules	
Current Diplomatic Clearance Status	Project Manager	Equipment in stores/ready for shipping	Edit time rules	Edit email rules	
Dispatch equipment to mobilisation port	Logistics Manager	Equipment in stores/ready for shipping	Edit time rules	Edit email rules	
5. CRUISE DELIVERY					
Planned Demobilisation end date		Dispatch equipment to mobilisation port	Edit time rules	Edit email rules	
6. POST PROJECT					
Upload cost 4: Post project cost	Project Manager	Planned Demobilisation end date	7 after planned docking date	Edit email rules	
Close project	Project Manager	Upload cost 4: Post project cost	186 after planned docking date	Edit email rules	

Fig 3. Example of a workflow template.

## 3.2 Configure Email Notifications

For each step you can configure email notifications. Click 'Edit email rules' to start creating a notification. This will show the notifications already set for this step and gives the option to add new notifications. Click the 'Add notification' button to start creating a new notification.

Fig 4. Create an email notification.

Recipients: Add project roles and/or specific users who should receive this notification

Send notification on: Configure when the notification should be sent. When the step becomes active when the step is completed or on due date. Due date is the deadline that is configured.

Subject: The subject of the email notification.

Message: The content of the email notification. Use the parameters above (in yellow block) to add specifics.

Parameter	Description
#{recipient}	Name of the recipient(s) of the email
#{description}	Deprecated (this shall be removed)
#{stepname}	Name of the workflow step for which the email notification is set
#{reference_number}	MFP workflow ID (e.g., 22/136)
#{workflowname}	Project name
#{duedate}	Due date as set by the time rule for this step
#{url}	Link to the workflow step for which the email notification is set
#{responsible_user}	Name(s) of the user(s) who are set as responsible for this step
#{workflowowner}	
#{date}	Today's date
#{createddate}	
#{ship}	Requested ship(s)
#{funding}	Funding source + funding status

### 3.3 Configure Post Cruise Assessment

To setup a post cruise assessment, go to the Post Cruise Assessment tab at the workflow template overview table. Here you can add question groups and questions. First add a question group by clicking the button. Select an icon for this group, enter a name and click Save. Now you can add questions.



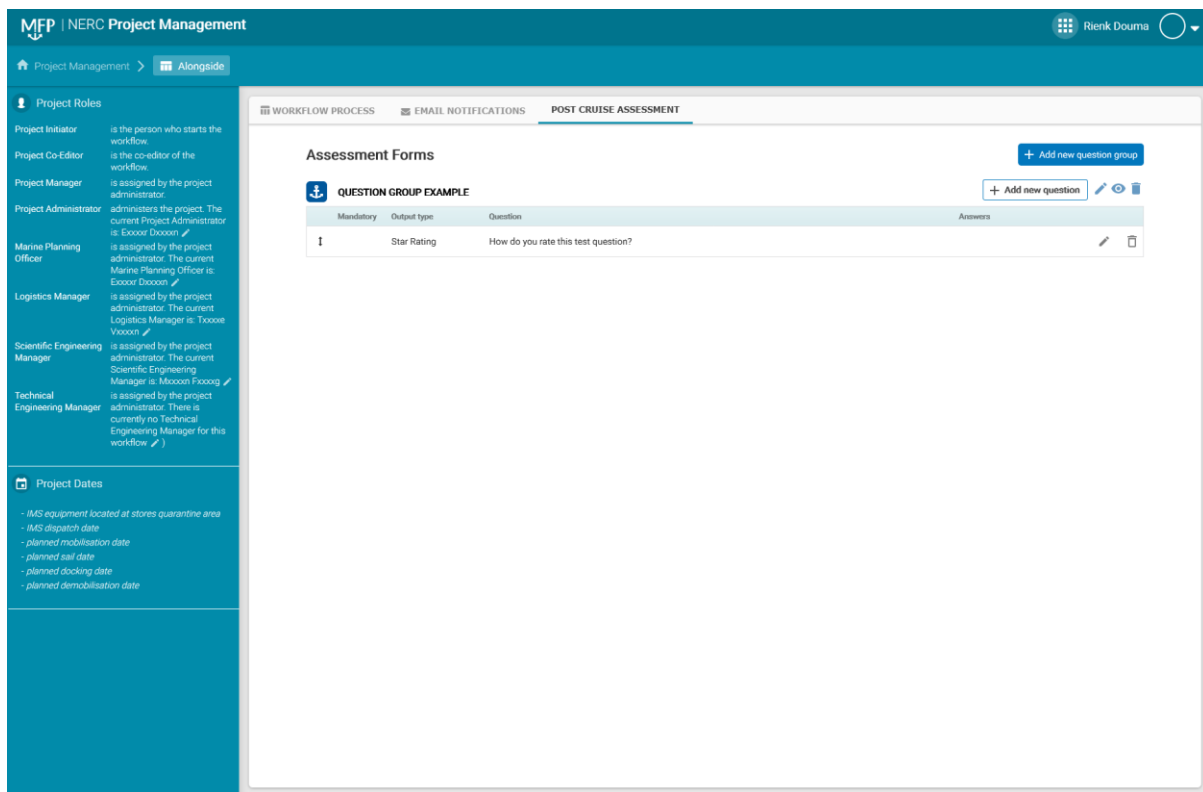


Fig 5. Setup the Post Cruise Assessment.

### NEW QUESTION

Question

Is this an example question?

Note

This is additional information regarding the question

Output Type

Star Rating ▼

Lowest Estimate

1

Highest Estimate

5

☐ Mandatory

CANCEL

SAVE

Fig 6. Create new question pop-up.

# 4 Ground Data

In Ground Data the following items can be configured:

## 4.1 Steps

This tab shows a list of steps used in the (application) forms. Steps that contain user configurable items will show a 'Config' link in the Configure column. This gives access to the configurable items. Configurable items can be a text, for example in the Application Note step, or the option to add questions in the Cruise checklist or Questionnaire steps.

MFP   NERC Project Management					
Project Management > Ground Data					
Steps	Cruise Application Steps				
Process	Name	Description	Show In Programme	Configuration	Workflows
Equipment Questions	Additional Comments		Yes		Cruise Project Management (Cruise Plan)
Cruise Application	Additional NMF Work	Additional NMF Work	Yes		Refit (Cruise Application)
Ship Fitted Equipment	Application Note	Refit Application Note	Yes	<a href="#">Config</a>	Refit (Cruise Application)
Portal Documents	Application Note	Equipment only	Yes	<a href="#">Config</a>	Marine Equipment Application Form (Cruise Application)
Cruise Location Templates	Application Note	NERC	Yes	<a href="#">Config</a>	Cruise Project Management (Cruise Application)
	Application Note	Custom configuration	Yes	<a href="#">Config</a>	Autonomous Deployments (Cruise Application), Autonomous Deployments (Cruise Plan)
	Chemicals		Yes		Cruise Project Management (Cruise Plan)
	Compressed gases		Yes		Cruise Project Management (Cruise Plan)
	Cruise Dates		Yes		Cruise Project Management (Cruise Application)
	Cruise Itinerary		Yes		Cruise Project Management (Cruise Plan)
	Cruise Location		Yes		Cruise Project Management (Cruise Application), Cruise Project Management (Cruise Plan)
	Cruise Location Analysis	Displays Marine Protected Areas and EEZ bounds for cruise location	Yes		Cruise Project Management (Cruise Application), Cruise Project Management (Cruise Plan)
	Current Diplomatic Clearance Status	Current Diplomatic Clearance Status - PDF Only step	Yes		Cruise Project Management (Cruise Plan)
	Deployments		Yes		Autonomous Deployments (Cruise Application), Autonomous Deployments (Cruise Plan)
	Details	Refit details	Yes		Refit (Cruise Application)
	Details	Passage details	Yes		Passage (Cruise Application), Alongside (Cruise Application)
	Details of Embarked Scientists	Marine Staff - PDF Only step	Yes		Cruise Project Management (Cruise Plan)
	Embedded Images	Step to display and upload inline images	Yes		Cruise Project Management (Cruise Application), Cruise Project Management (Cruise Plan), Autonomous Deployments (Cruise Application), Autonomous Deployments (Cruise Plan)
	Environmental Impact		Yes		Cruise Project Management (Cruise Application), Cruise Project Management (Cruise Plan)
	Frontpage		Yes		Cruise Project Management (Cruise Plan)

Fig 7. The Steps tab in Ground Data.

## 4.2 Process

The Process section can be used to select the steps used in the different forms. For example, the initial application form, follow-up cruise plan or supply agreement.

Use the drop-down menu at the top to select the form you want to configure. At the left is a list with all available steps, to the right the list with steps currently in the selected form. You can add or remove steps by dragging them in or out the form content list.

Any changes made here shall only be visible for newly started workflows. All existing workflows will still be using the "old" form step structure.

Fig 8. The Process tab in Ground Data.

## 4.3 Equipment Questions

This section can be used to manage the questions for equipment that is not related to a specific ship. These questions are asked in the application form. This section is explained in detail in the MFP Equipment Questions Quick Start Guide. Please refer to:

MFP-Equipment-Questions-Quick-Start-Guide.pdf

## 4.4 Cruise Application

This Cruise Application can be used to manage funding sources that are available for selection at the Funding Information step within the application form. Use the 'Add new funding source' button at the top-right of the screen to add a funding source. To delete a funding source, click the recycle bin at the far right of a source.

## 4.5 Ship Fitted Equipment

The Ship Fitted Equipment section can be used to manage the questions for ship fitted equipment. This is equipment related to a specific ship. These questions are asked in the application form at the Ship Fitted Equipment step. This section is explained in detail in the MFP Equipment Questions Quick Start Guide. Please refer to:

MFP-Equipment-Questions-Quick-Start-Guide.pdf

## 4.6 Portal Documents

The Portal Document section can be used to manage documents available at the Help & Documentation tab in the Scientist Portal and at workflow steps that offer document downloads. For example, a diplomatic clearance step where you can download a diplomatic clearance application template. It also offers the option to add a link to a webpage.

Portal Documents is divided into two sections: Portal Documents and Ship Specific Documents. Documents and links added here all appear in the Scientist Portal.

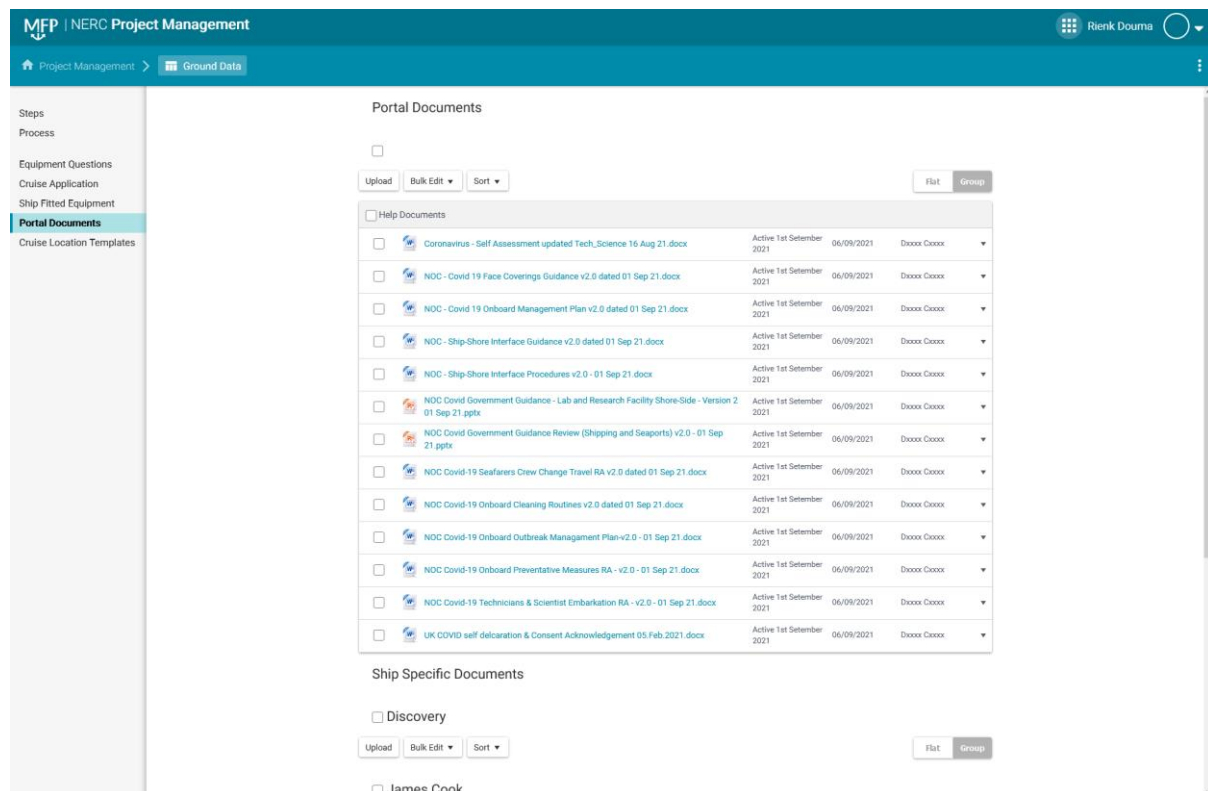


Fig 9. The Portal Documents tab in Ground Data.

To upload a document or link, choose a section and click the upload button. This opens the following pop-up:

The 'UPLOAD A DOCUMENT' pop-up form is divided into two main sections. The first section, 'Upload a document', features a 'Select file...' button and a 'Drop files here to upload' area. The second section, 'Or Paste a link', includes a 'Folder' dropdown menu, a 'Document Name' text field, a 'Short Note' text field, and a 'Comments' text area. At the bottom of the form, there are 'CANCEL' and 'SAVE' buttons.

Fig 10. Document upload pop-up.



- Click the Select file button if you want to upload a document or paste a link.
- Select a folder. The folder is a subcategory. Subcategories can be linked to specific workflow steps, such as the previously mentioned diplomatic clearance example.
- Enter a name for the document or link.
- Enter a short note and/or comments if required.
- Click Save.

## 4.7 Cruise Location Templates

This section is only available for organisations who use cruise location templates. Cruise location templates are predefined sets of sampling stations that can be used at the Cruise Location step in the application form.