

MIS ΠΡΟΔΙΑΓΡΑΦΕΣ – Αρχική έκδοση

Σε συνέχεια των προηγούμενων επαφών μας και λαμβάνοντας υπόψη την οικονομική προσφορά με αριθμό 1731, θα ήθελα να αναφέρω τις πιο κάτω προδιαγραφές.

ΠΕΡΙΓΡΑΜΜΑ

1. Η MIS είναι μία κεντρική εφαρμογή που θα καλύπτει όλες τις καθημερινές ανάγκες λειτουργίας της εταιρίας μας (επισυνάπτεται οργανόγραμμα – File “ORGANOGRAM”).
2. Θα ενοποιεί και θα περιλαμβάνει όλα τα συστήματα και εφαρμογές της εταιρίας, των υπαρχόντων και αυτών που θα δημιουργηθούν.
3. Ο κάθε χρήστης θα εισέρχεται στο περιβάλλον του δικού του division.

ΕΠΙΜΕΡΟΥΣ ΛΕΠΤΟΜΕΡΙΕΣ ΠΡΟΔΙΑΓΡΑΦΩΝ

A. ΛΕΙΤΟΥΡΓΙΑ Ships Surveys & Certification Division

CASE MANAGEMENT

The user shall be able to:

- a. Review the cases already created (View: List of Cases)
- b. To Add New Case (View: Add New Case)

Comments:

- In the view “List of Cases” view shall have the capability to sort the cases already created according to each column.
- It shall be possible to enter in the system, the “forms” – “documents” that are indicated.

For further guidance, please refer to the link provided.

Short Analysis of the View: Add New Case

- The user shall be able to insert the main information: Date, Applicant, Name of vessel, Managing Company, etc. Thereafter the applicable surveys (services) shall be “entered” by one of the following manners:
 - i. Manually “entered”. This option shall include all possible surveys (services).
 - ii. According to the data received by the application “Book Survey” (refer to the “Fleet on Line 2.0”). Manual correction shall be available (in order to modify, delete, add surveys).
 - iii. According to the data received by the portal of the surveyors / offices **will explain later**). Manual correction shall be available (in order to modify, delete, add surveys).
- The user shall have the ability to provide information for the Requested Services. For this purpose, the user shall be able to FILL thew form “F-4517-1” – NOTIFICATION OF REQUESTED SERVICES (refer to attachment NOTIFICATION OF REQUESTED SERVICES)
 - Clickable button.

SURVEY ASSIGNMENTS (Create Assignment)

The user shall be able to:

- a. Review the surveys already assigned (View: List of all Assignments)
- b. To Add New Assignment (View: Add New Assignment)

Comments:

- Each user shall have the access to the below mentioned FUNCTIONS, according to the assignment that may have. Therefore, the MIS application must have the ability to assign each FUNCTION to separate user or users (from the same or even from different division).
- The user shall be capable (within the range of his jurisdiction), to move back and forward in the aforementioned FUNCTIONS.
- For each “form” – document indicated, the user shall have the ability to sign it, to save it, to correct it, to delete it, to forward to another user for signature, to recall it, etc.
- Each one of the “forms” used shall collect automatically the data available in the system.
- Certain data entered in the “forms”, shall be possible to be further used, in other parts of the system.
- It will be possible the “form” – documents to be replaced by amended “form” – documents (by the ADMINISTRATOR).

Analysis of the View: Add New Assignment

1. CREATE INSTRUCTIONS

The user shall have the below options (check box or click field to continue):

- a. Classification Committee
 - The user shall complete the attached document (No. 1.1).
 - The data of the vessel shall be automatically filled in.
 - The document shall be able to be saved, signed, forwarded, copied, etc.
- b. Technical Committee
 - The user shall complete the attached document (No. 1.2).
 - The data of the vessel shall be automatically filled in.
 - The document shall be able to be saved, signed, forwarded, copied, etc.
- c. Technical Instructions
 - The user shall be able to prepare technical instructions. An example of the outgoing message is attached (No. 1.3).
 - The user shall select surveyor / office that shall perform the surveys.
 - The surveys that will appear are those inserted to the “case”. The user shall be able to choose for which of these types of surveys, shall prepare instructions.
 - The technical instructions shall be consisted by the below “fields”:
 1. Type of survey
 2. Report(s) to be filled by the surveyor for the relevant type of survey
 3. Guidance for the relevant type of survey
 - According to the type and flag of the vessel, certain field shall be “pre-arranged”.
 4. Important notes, for the relevant type of survey
 5. Supporting documentation to be submitted
 - According to the type and flag of the vessel, certain field shall be “pre-arranged”.
 6. Certificate to be issued or endorsed. In case certificate is to be issued, the relevant validity of the certificate is to be inserted (i.e. three (3) months)
 7. In addition, the user must have the ability to incorporate attachment to the technical instructions that shall release.
 - When the user shall select the type of survey, the relevant fields (which shall be pre-arranged) shall appear in the instructions. Therefore, the MIS application must have the ability for the pre-arrangement of the entries.
 - After having inserted all the aforementioned data, related to each specific type of survey, there shall be additional “fields” to be entered (pre-arranged) for each technical instruction (relevant to all the types of the surveys included in a specific technical instruction), that shall appear at the end of each technical instruction (refer to attachment No. 1.3 – **yellow highlighted**).

- The user (admin or the user that will be defined) shall have the ability to amend the pre-arranged data.
 - The part of the technical instructions relevant to the issuance or the endorsement of the certificates, shall be summarized almost at the end of the instructions and shall not be indicated in each type of survey separately (refer to attachment No. 1.3 – blew highlighted).
 - The user must have the information for the level of authorization of the attending surveyor, and if applicable the level of authorization of all the surveyors of the office that shall perform the surveys.
- d. Flag Notifications
- Guidance shall follow. Actually, various “forms” shall be inserted according to the instructions of each individual flag administration, or alternatively a specific “text” shall appear according to the flag administration of the vessel.

2. RECEIVE SR / CERTIFICATES

The user shall be able to:

- a. Verify that the Form 1215225-SR is received and that it is in order (by check box).
- b. Alternatively, to indicate that he has asked the said form to be amended (by check box).
- c. Verify that the copies of certificates issued or endorsed as indicated in our technical instructions have been received and that are in order (by check box).
- d. Alternatively, to indicate that he has asked the certificates to be amended.
- e. In case of amendments have been requested, then the user to enter reference of the message sent to the attending surveyor (and to have history of the messages he sent, and hyperlink to the messages sent).
- f. FILL the form “F-4517-2” – NOTIFICATION OF COMPLETION OF SURVEYS (refer to attachment No. 2.1) – Clickable button.

4. RECEIVE REPORTS

The user shall be able to:

- a. Verify that the survey reports as indicated in the instructions have been received and that are completed (by check box).
- b. Alternatively, to indicate that he has asked for amendments or for additional reports to be submitted (by check box).
- c. Verify that the supporting documentation as indicated in our technical instructions have been received and that are in order (by check box).
- d. Alternatively, to indicate that he has asked for missing supporting documentation to be submitted.
- e. In case of amendments have been requested, then the user to enter reference of the message sent to the attending surveyor (and to have history of the messages he sent, and hyperlink to the messages sent).
- f. FILL the form “F-4517-16” – CHECKLIST FORM FOR CONSIDERATION OF SURVEYS REPORTS FROM ADMINISTRATIVE POINT OF VIEW (refer to attachment No. 3.1) – Clickable button.
- g. FILL the form “F-4517-6” – SUBMISSION OF SURVEYS REPORTS TO STES DPT. (refer to attachment No. 3.2) – Clickable button.
- h. FILL the form “F-4517-5” – SUBMISSION TO PLAN APPRAISAL DIVISION OF THE TECHNICAL DOCUMENTS OTHER THAN THOSE OF SURVEYS REPORTS WITH THEIR ATTACHED SUPPORTING DOCUMENTATION (refer to attachment No. 3.1) – Clickable button.

4. EVALUATION OF REPORTS

The user shall be able to:

- a. Verify that the survey reports and the supporting documentation submitted have been considered and that are in order (by check box).

- b. Alternatively, to indicate that he has asked for amendments to the reports submitted or amendments to the supporting documentation submitted (by check box).
- c. In case of amendments have been requested, then the user to enter reference of the message sent to the attending surveyor (and to have history of the messages he sent, and hyperlink to the messages sent).
- d. FILL the form "F-4517-10" – Survey Reports Consideration and Evaluation Form (refer to attachment No. 4.1) – Clickable button.
- e. FILL the form "F-4517-20" – Form for the service suppliers control based on their reports (refer to attachment No. 4.2) – Clickable button.

5. EVALUATION OF SURVEYOR

The user shall be able to:

- a. Verify that the attending surveyor has been evaluated, in accordance with the reports and the supporting documentation submitted (by check box).
- b. FILL the form "F-4517-21" – Form for the Surveyors evaluation based on consideration/evaluation of survey reports (refer to attachment No. 5.1) – Clickable button.

6. ISSUANCE OF CERTIFICATES

The user shall be able to:

- a. FILL the form "F-4517-14" – Instruction for the Issuance of Certificates form (refer to attachment No. 6.1) – Clickable button.
- b. FILL the form "F-4517-9" – INSTRUCTIONS FOR ISSUANCE OF FRESH SHORT-TERM CERTIFICATES (refer to attachment No. 6.2) – Clickable button.
- c. To be connected to the application for the issuance of the certificates for the necessary actions as per the application.
- d. SIGN the drafts of the certificates that are to be issued (e-signature). **The method to be discussed.** One solution is to insert a button "Sign Draft Certificates" for head office users, at the step 4 "Manage Certificates" at the section "Draft Certificates". The e-signature shall be inserted via the API that will be used for the e-signatures.
- e. Forward the draft certificates for final approval – signature, and receive the signed draft of certificates by the technical director or his substitute (in order to be issued accordingly).
- f. Verify that the necessary certificates of the vessel have been issued (by check box). **Important note:** The system shall be arranged in order a notification to be sent to: (a) owners, (b) relevant INSB Class office – if applicable (c) INSB Class head office, that certificate(s) has / have been issued. This notification to be sent in a few hours **(to be defined)** after the issuance of the certificates.
- g. Alternatively, to indicate that he has informed the relevant party for outstandings (by check box).
- h. In case of outstandings, then the user to enter reference of the message sent to the attending surveyor (and to have history of the messages he sent, and hyperlink to the messages sent).

7. UPDATE SURVEY STATUS

The user shall be able to:

- a. FILL the form "F-4517-12" – Survey Status Form (refer to attachment No. 7.1) – Clickable button.
- b. ENTER in a view that will insert data in the survey status of the vessel to the following sections:
 - i. Certificates
 - ii. Surveys
 - iii. Recommendations
 - iv. Memoranda
 - v. Memos

vi. Additional entries to be discussed, such as status of the vessel

Comments:

- For the entry of the aforementioned data, we have to discuss further.

- For the entry of data concerning the certificates, a table can be arranged, divided in parts as per the application of e-certificates. The user to be able to choose the certificates to be indicated in the survey status, the certificate number, date of issuance, date of expiry. In case of certificates issued electronically, the data in the fields can be pre-arranged, with the ability the data to be corrected.
 - For the entry of data concerning the survey, a table can be also arranged taking into account (a) the instructions given, (b) the entry of additional surveys as indicated in previous forms used (forms: F-4517-10, F-4517-12).
 - The user shall be able to choose the surveys that are to be entered in the survey status.
 - The user shall normally insert the “done” date and the “due” date of the Renewal / Special surveys.
 - A mechanism shall be arranged in order the other surveys (annual, intermediate, periodical, etc.), and their due dates, to be automatically appear to the user, with the ability to be manually amended.
 - A mechanism previously used is described in the attachments 7.2, 7.3, 7.4 and for advancement of anniversary date 7.5.
 - The entry of Recommendations, Memoranda, Memos, can be also entered through a table taking into account the content of previous forms used. The data shall be pre-arranged according to the forms previously used forms: F-4517-10, F-4517-12, however the user shall have the ability for amendments.
 - The entry of surveys according to the system of Continues Survey machinery (CSM), is to be also included. Data will be provided (actually, it is anticipated a file – list indicating combined information deriving from existing databases shall be provided.
 - The entry of additional data shall be also available. A table previously in use is attached – 7.6. Detailed guidance shall follow.
 - In case a survey status already exists for a vessel, then a table can appear to the user, in order to amend all the data together. The automations that have been designed for the initial preparation of the survey status, to also apply.
- c. To confirm that the survey status has been forwarded to the concern party (shipowners – INSB Class office) – (by check box).

8. OTHER FUNCTIONS

The user shall be able to:

- a. FILL the form “F-4517-15” – NOTICE FOR CLASS/STATUTORY SUSPENSION / WITHDRAWAL (refer to attachment No. 8.1) – Clickable button.
- b. FILL the form “F-4517-13” – Form for Transfer of Ships Records to non-active archive or destroy (refer to attachment No. 8.2) – Clickable button.

Guidance for additional FUNCTIONS shall follow, as necessary. Actually, various “forms” shall be inserted according to the instructions of each individual flag administration for reporting procedures, and / or additional “forms” for reporting to other parties (Fairplay, etc.).

In general, there shall be an ability to insert additional forms to the MIS application (to be opened up, if necessary, using a clickable button).

B. ΛΕΙΤΟΥΡΓΙΑ Offshore Vessels Division

The functions of this division are similar to the functions of the Ships Surveys & Certification Division. In detail, the said division shall have the below FUNCTIONS:

CASE MANAGEMENT

The user shall be able to:

- a. Review the cases already created (View: List of Cases)
- b. To Add New Case (View: Add New Case)

SURVEY ASSIGNMENTS (Create Assignment)

Analysis of the View: Add New Assignment

1. CREATE INSTRUCTIONS
2. RECEIVE SR / CERTIFICATES
3. RECEIVE REPORTS
6. ISSUANCE OF CERTIFICATES

Comments:

- The users of this divisions shall have the same abilities for the functions indicated, with the abilities of the Ships Surveys & Certification Division.
- The FUNCTIONS that are not indicated to this division (numbers 4, 5, 7, 8), shall be performed by the users of the Ships Surveys & Certification Division. Therefore, the MIS application should be arranged accordingly.
- In case needed, the FUNCTION 8, maybe needed for this division, incorporating different additional uses.

C. ΛΕΙΤΟΥΡΓΙΑ Plan Appraisal Division

CASE MANAGEMENT

The user shall be able to:

- a. Review the cases already created (View: List of Cases)
- b. To Add New Case (View: Add New Case)

For further guidance, please refer to the link provided.

Short Analysis of the View: Add New Case

- The user shall be able to insert the main information: Date, Applicant, Applicant, Name of vessel, etc.
- Thereafter the applicable approvals (services) shall be "entered". The list of approvals required (Many of those are indicated in the application "e-certificates" – section "Approval Documents") shall be updated by the admin. In case of other approvals are required (in addition to those that have been recorded by the admin), then the user shall have the ability to insert additional ones.
- For each approval the user shall define whether approval or acceptance is required.
- The user shall have the ability to provide information for the Requested Services. For this purpose, the user shall be able to FILL thew form "F-4517-1" – NOTIFICATION OF REQUESTED SERVICES (refer to attachment NOTIFICATION OF REQUESTED SERVICES)
 - Clickable button.

APPROVAL ASSIGNMENTS (Create Assignment)

The user shall be able to:

- c. Review the surveys already assigned (View: List of Assignments)
- d. To Add New Assignment (View: Add New Assignment)

Analysis of the View: Add New Assignment

PA1. CASE ELABORATION

The user shall be able to:

- a. Assign the technical personnel that is assigned for each approval (Select Approval Staff). The relevant drop-down menu shall be entered by the admin. A batch assignment could be also applied.
- b. FILL the relevant "Checklist" which corresponds to the approval "entered" in the case – Clickable button.
- c. In case of outstandings, then the user to enter reference of the message sent to the relevant party (and to have history of the messages he sent, and hyperlink to the messages sent).

PA2. ISSUE OF APPROVAL DOCUMENT

The user shall be able to:

- a. To be connected to the application for the issuance of the certificates for the necessary actions as per the application.
- b. SIGN the drafts of the certificates that are to be issued (e-signature). **The method to be discussed.**
- c. Forward the draft certificates for final approval – signature, and receive the signed draft of certificates by the technical director or his substitute (in order to be issued accordingly).
- d. Verify that the necessary certificates of the vessel have been issued (by check box).
- e. Alternatively, to indicate that he has informed the relevant party for outstandings (by check box).

PA3. ISSUANCE OF SR

The user shall be able to:

- a. FILL the form "F-4517-2" – NOTIFICATION OF COMPLETION OF SURVEYS (refer to attachment No. PA3.1) – Clickable button.

PA4. OTHER FUNCTIONS

Guidance for additional FUNCTIONS shall follow, as necessary. Actually, various "forms" shall be inserted according to the instructions of each individual flag administration for reporting procedures, and / or additional "forms" for reporting to other parties.

D. ΛΕΙΤΟΥΡΓΙΑ Marine Management Systems Certification Division

The structure of this division shall contain:

(a) The FUNCTIONS of the **Ships Surveys & Certification Division**

1. CREATE INSTRUCTIONS
2. RECEIVE SR / CERTIFICATES
3. RECEIVE REPORTS
4. EVALUATION OF REPORTS
5. EVALUATION OF SURVEYOR
6. ISSUANCE OF CERTIFICATES
7. UPDATE SURVEY STATUS

8. OTHER FUNCTIONS

(b) the FUNCTIONS of the **Plan Appraisal Division**

PA1. CASE ELABORATION

PA2. ISSUE OF APPROVAL DOCUMENT

PA3. ISSUANCE OF SR

PA4. OTHER FUNCTIONS

The FUNCTIONS of the said division shall be analyzed as necessary and necessary information shall be provided accordingly.

E. ΛΕΙΤΟΥΡΓΙΑ Greek Flag State Ships Statutory Surveys Division

The functions of this division are similar to the functions of the Ships Surveys & Certification Division. **Details shall be provided accordingly.**

F. ΛΕΙΤΟΥΡΓΙΑ ατόμων εκτός Divisions

The credentials of these users, shall be assigned by the admin (will be abilities already defined in the divisions, or additional which will be defined).

G. ADDITIONAL FUNCTIONS of the MIS

The MIS application shall have the below additional abilities:

1. SURVEYORS

The degrees of authorizations of the surveyors (and of the auditors) as well as information related to the surveyors, are kept in an access-based database. The MIS application is to be connected with this database, in order the applicable information to be obtained.

The user shall have the necessary information, (a) automatically at the step CREATE INSTRUCTIONS, and (b) when will be required by him. The user must have the information for the level of authorization of the attending surveyor, and if applicable the level of authorization of all the surveyors of the office that shall perform the surveys. Please refer to the attachment G1, which provides summarized information for a surveyor.

The method of transfer of the information from the database to the MIS application **shall be provided.**

In the function SURVEYORS, the user shall be able to have access to the database related to the surveyors.

2. QMS

The Quality Management System (QMS) of the company is being maintained in a FOLDER, which contains subfolders and each subfolder contains several archives.

In the FUNCTION QMS, the user of the MIS application must have access to the QMS FOLDER.

The forms which are used in the MIS application are saved in the QMS. When the form is being amended, then the form used in the MIS application must be also automatically amended.

3. CORRESPONDENCE EXCHANGE (E-MAILS)

The MIS application shall incorporate the receipt and the sending of e-mails (similar to outlook)

4. DATABASE FOR CLIENTS

The MIS application, shall have a database which shall indicate the contact details of shipowners, managers, and other “clients”.

It shall be possible to forward e-mails in groups.

5. STATISTICS

The MIS application, shall provide the ability to extract statistics, lists, and various information based on the data saved in the various databases.

The user shall be capable to ask for certain variables to be taken into account.

Examples are attached, such as Register of books (refer to attachment No. G5.1 and to the link <https://insb.gr/vessels-register/>), internal notices (refer to attachments Nos G5.2, G5.3, G5.4).

6. CONNECTION WITH SURVEYORS

The MIS application shall be able to receive information / documentation (through link) by the portal of the surveyors abroad.

A function similar to the “Book Survey” (refer to the “Fleet on Line 2.0”) to be arranged, in order to receive applications directly by the surveyors.

H. COMMENTS

1. There is a pending function from the application “e-certificates”, to be incorporated in the MIS application. To send notification to (a) owners, (b) INSB Class offices abroad, (c) INSB Class head office, when shall be issued. As previously indicated this notification to be sent in a few hours **(to be defined)** after the issuance of the certificates.
2. Another pending function from the application “e-certificates”, is that the amendments that shall take place from the surveyors in the “particulars” of the vessel, shall be inserted in the MIS application, upon confirmation by the head office. Therefore, a relevant module, is to be prepared.
3. LOG HISTORY shall be available for all the users of the MIS application.
4. The design of the survey status, shall be so arranged, in order to be able to have an image of the vessel’s survey status at a previous date.
5. The amended design of DASHBOARDS (main and of each division), shall be forwarded in due course.
6. The ADMINISTRATOR shall also have the ability to amend the text in the various parts of the system.