HAWAII.PORTCALL.COM

Training Manual

Contents

Overview

For Everyone

Hawaii.PortCall.com simplifies scheduling and provides transparency for everyone working with the Hawaii ports.

- Agents request port calls online.
- Port personnel book berth reservations.
- And everyone coordinates changes in a collaborative, online workspace.

The public has access to basic movement and in-port information, and in order to see port call details and make changes, people need to log into the site.

Getting Started

For New Users

Creating an Account

To start, you will need an 'Account Invitation Email' from a User Manager in your organization. If you're unsure who to contact, you can email support@portcall.com for help.

- Open your email.
- Click Accept Invitation.
- Enter your First and Last Name.
- Enter a password with:
  - More than 5 characters
  - One uppercase letter
  - One lowercase letter
  - One number
  - One character (!, $, %, #, etc.)
- Repeat that password.
- Click Complete Registration.

Viewing & Editing Your Information

Once invited, you cannot change your email address or organization affiliation.

- Click Me on the header bar.
- Click Edit next to the Details header.
- Change your name by:
  - Clicking in either name field.
  - Entering text.
- Change your job description by:
  - Clicking in either name field.
  - Entering text.

- Change your contact numbers by:
  - Clicking +add next to contacts.
  - Selecting an option in the dropdown.
  - Entering text.
  - Clicking and removing it with the x button.
- Change your profile image by:
  - Clicking Edit Profile Image.
  - Selecting a default image.
  - Or by clicking Upload New Image.
  - Selecting a file on your computer.
  - Clicking Open.
  - Clicking Done.
- Click Done Editing to save and exit the editing mode.
- Change your landing page by:
  - Clicking the dropdown under My Landing Page.
  - Selecting an option.

    This will be the page you land on every time you log in.
- Change your password by:
  - Clicking Change Password in the Actions box.
  - Entering your old password.
  - Entering a new password.

    For more on password requirements, see Getting Started – Creating a New Account.
  - Repeating the new password.
  - Clicking Change.

- View the Booking Rate to see your ratio of successfully booked PortCalls.

  Only present if you have the Reserve Berths permission.
- View permissions given to your account.

Viewing & Editing Your Organization's Information

- Click Everyone on the header.
- Click your organization's name.
- Click Edit next to the Details header.
- Change your organization's name by:
  - Clicking the name field.
  - Entering text.
- Change your organization's addresses by:
  - Clicking +add next to address.
  - Entering text in each field.
  - Clicking and removing it with the x button.
- Change your organization's contact numbers by:
  - Clicking +add next to contacts.
  - Selecting an option in the dropdown.
  - Entering text.
  - Clicking and removing it with the x button.
- Change your organization's profile image by:
  - Clicking Edit Profile Image.
  - Selecting a default image.

    - Or by clicking Upload New Image.
    - Selecting a file on your computer.
    - Clicking Open.
    - Clicking Done.
- Click Done Editing to save and exit the editing mode.
- View a member's profile card by:
    - Clicking their name.
- View the Booking Rate to see the organization's ratio of successfully booked PortCalls.

    Only present for organizations with members that have the Reserve Berths permission.

Viewing the Schedule

Anyone can go to Hawaii.PortCall.com to view the public schedule. Users must be logged in to see a more detailed view of the schedule.

- Go to Hawaii.PortCall.com.
- Navigate to the homepage by clicking the Hawaii.PortCall.com link on the header.
- View the daily arrivals, departures, and shifts by:
    - Clicking the Vessel Movements tab.
    - Selecting the Port filter.
    - Typing and/or selecting a port.
    - Clicking Show All.
    - Clicking the arrows next to the date.
    - Clicking Today.
- View the current vessels in the port by:

- Clicking the Vessels In Port tab.
  - Selecting the Port filter.
  - Typing and/or selecting a port.
  - Clicking Show All.
  - Clicking the arrows next to the date.
  - Clicking Today.
- View the 2 year cruise schedule by:
  - Clicking the Cruise Schedule tab.
  - Selecting the Port filter.
  - Typing and/or selecting a port.
  - Clicking Show All.
- View the detailed schedule by:
  - Logging in.
  - Clicking Berths on the header.
  - Selecting the Port filter.
  - Typing and/or selecting a port.
  - Clicking Show All.
  - Clicking the Berth Type filter.
  - Typing and/or selecting a berth type.
  - Clicking Show All.
  - Scrolling down the timeline.
  - Clicking the calendar icon and selecting a specific date.
  - Clicking the arrows next to the calendar icon.
  - Clicking Back to Today.
  - Clicking Traffic on the header.
  - Clicking the Port filter.
  - Typing and/or selecting a port.
  - Clicking Show All.

    - Clicking the arrows next to the date.
    - Clicking Back to today, Month Day.
    - Scrolling down with the cursor over the timeline.
    - Scrolling up with the cursor over the timeline.
    - Clicking and dragging the timeline side to side.

Viewing a PortCall

A PortCall refers to one or more berth reservations for a vessel. Each reservation contains a movement in and out of a berth.

- Navigate to a PortCall profile by:
    - Clicking Berths on the header.
    - Clicking a timeblock.
    - Clicking View PortCall Profile.
- Or navigate to a PortCall profile by:
    - Clicking Traffic on the header.
    - Clicking a vessel.
    - Clicking View PortCall Profile.
- Click the Reservation card with the bollard icon.
- Click Back to Itinerary.
- Click the Vessel card with the ship icon.
- Click Back to Itinerary.
- Click the People card with the users icon.
- Click Back to Itinerary.
- Scroll down to see the log.

The log contains a record of all changes to the PortCall as well as posts from other users.

Receiving Notifications on a PortCall

- Navigate to a PortCall profile.
- Click Watch this PortCall.
- Click Me on the header.
- View changes to that PortCall in your Notifications section.

Printing a PortCall's Itinerary

- Navigate to a PortCall profile.
- Click Print Itinerary.
- Click Print on the browser's window.

Managing a PortCall

For Agents, Schedulers, Berth Reservers, Harbormasters, Cargo Specialists, & Berth Managers

Making a Reservation

- Click Berths on the header.
- Click an empty area in a row (berth) and column (day).
- Change the width (duration of the reservation) by:
  - Clicking and dragging the sides of the blue timeblock.
  - Or selecting the date/time values and typing in new values.
  - Or clicking the icons and selecting new values.
- Click Reserve Berth.
- Indicate the vessel and select the height (length of the vessel) by:
  - Searching for a vessel in the search bar and selecting the vessel from the system.
  - Or clicking Can’t find the right vessel?, adding a new vessel and its information, and clicking Done.
  - Or clicking Reserve by length only and entering the length of the vessel.
- Click Submit.

Updating a Reservation

Only users listed under the People section of that PortCall profile can update the reservation. For more information, see Managing a PortCall – Managing People on a PortCall.

- Click Berths on the header.
- Navigate to a timeblock on the grid.
- Change the location by:
  - Clicking Change Berth.
  - Clicking another row in the grid.
  - Clicking Confirm to save the change.
  - Or clicking Edit Timeblock.
  - Dragging the timeblock up or down.
  - Clicking Confirm to save the change.
  - Or clicking View PortCall.
  - Clicking the Reservation card with the bollard icon.
  - Clicking in the Footmark field and entering a new value.
- Change the duration by:
  - Clicking Edit Timeblock.
  - Dragging the timeblock left and right.
  - Or dragging the timeblock's sides left and right.
  - Or clicking in the date/time field and Entering a new value.
  - Or clicking the calendar icon and selecting a new value.
  - Or clicking the clock icon and selecting a new value.
  - Clicking Confirm to save the change.

- Change the First & Last Line times by:
  - Clicking Log Actual.
  - Or clicking in the date/time field and entering a new value.
  - Or clicking the clock icon and selecting a new value.
  - Clicking Confirm to save the update.
- Click View PortCall.
- Change the Reservation details by:
  - Clicking the Reservation card with the bollard icon.
  - Toggling the Side-To.
  - Clicking the Tariff Activity for each day and entering additional information.
  - Clicking View... under Pier-Side Amenities and selecting amenities.
  - Clicking Back to Itinerary.
- Clicking in the Last - Recent PortCalls field and entering text.
- Clicking in the Next - Recent PortCalls field and entering text.

Changing the Vessel on a PortCall

Only users listed under the People section of that PortCall profile can change the vessel. For more information, see Managing a PortCall - Managing People on a PortCall.

- Navigate to a PortCall profile.
- Click the Vessel card with the ship icon.
- Change the vessel information by:

- Searching for a vessel in the search bar and selecting the vessel from the system.
- Or clicking Can’t find the right vessel?, adding a new vessel and its information, and clicking Done.
- Clicking Edit vessel and entering new values for the vessel.
- Clicking in the Air Draft field and entering a new value.
- Clicking in the Deep Draft field and entering a new value.

- Click Back to Itinerary.

Posting Comments on a PortCall

- Navigate to a PortCall profile.
- Click on the Add Comment field in the Log.
- Enter your information.
- Click Post or press Enter on the keyboard.

Posting Attachments on a PortCall

- Navigate to a PortCall profile.
- Click on the paperclip icon in the Log.
- Select a file on your computer.
- Click Open.
- Click Post or press Enter on the keyboard.

Adding a Shift to a PortCall

Only users listed under the People section of that PortCall profile can add a shift. For more information, see Managing a PortCall – Managing People on a PortCall.

- Click Berths on the header.
- Navigate to a timeblock on the grid.
- Click the timeblock.
- Click Add Shift.
- Click an empty cell.
- Change the duration of the shift by:
  - Dragging the timeblock left and right.
  - Or dragging the sides of the timeblock left and right.
  - Or clicking in the date/time field and entering a new value.
  - Or clicking the calendar icon and selecting a new value.
  - Or clicking the clock icon and selecting a new value.
- Change the location of the shift by:
  - Dragging the timeblock up or down.
- Click Confirm to save the shift.

Managing People on a PortCall

Initially, the Attending Agent is set to the requester, and the Scheduling Authority users are all the users with the Manage Berths permission for that berth. Only users listed under the People section of that PortCall profile can change the users.

- Navigate to a PortCall profile.

- Click the People card with the users icon.
- Change the Editors by:
  - Clicking the Editors dropdown.
  - Searching or selecting a username.
  - Clicking add.
  - Clicking the x button next to the editor's name to remove them.
- Change the Attending Agent by:
  - Clicking the Attending Agent dropdown.
  - Searching and/or selecting a username.
- Change the users listed under Requesting Agency by:
  - Clicking Me on the header.
  - Clicking Edit next to Who can edit my PortCalls?.
  - Clicking the Invite Editor… dropdown.
  - Searching and/or selecting a username.
  - Clicking add.
  - Clicking and removing it with the x button.
  - Clicking Done Editing to save the change.

Responding to an Approval Card

Only users listed under the People section of that PortCall profile can respond to approvals. For more information, see Managing a PortCall – Managing People on a PortCall.

- Navigate to a PortCall profile.

- Click View all in the Approval Cards section.
- Click appropriate responses to each Approval card.
- Click << Back to PortCall.
- Add additional information to each card by:
  - Clicking the Add Comment… field.
  - Entering information.
  - Pressing Enter on the keyboard.
  - Or clicking the paperclip icon.
  - Selecting a file on your computer.
  - Clicking Open.
  - Pressing Enter on the keyboard.

Booking a Reservation

Harbormasters, Cargo Specialists, & Berth Managers. Only users with the Manage Berths permission for the reserved berth can book the reservation.

- Navigate to a PortCall profile.
- Book a Reservation by:
  - Clicking the Book button on the Reservation card.
  - Or clicking the Reservation card and clicking the Book button.

Canceling a Reservation

Cancels only the Reservation and it’s timeblock.

- Navigate to a PortCall profile.

- Click the Reservation card with the dates and times.
- Click Cancel Reservation.
- Click Yes.

Canceling a PortCall

Cancels all Reservations and their timeblocks in that PortCall.

- Navigate to a PortCall profile.
- Click Cancel PortCall.
- Click Yes.

Issuing a Declaration of Security

Harbormasters, Cargo Specialists, & Berth Managers only.

- Navigate to a PortCall profile.
- Click the Vessel card with the ship icon.
- Change the Effective field by:
  - Clicking in the date/time field and entering a new value.
  - Clicking the calendar icon and selecting a new value.
  - Clicking the clock icon and selecting a new value.
- Change the Expires field by:
  - Clicking in the date/time field and entering a new value.
  - Clicking the calendar icon and selecting a new value.
  - Clicking the clock icon and selecting a new value.

- Change the Issued By field by:
  - Clicking the Issued By field.
  - Entering text.

Managing a Berth

For Harbormasters, Cargo Specialists, & Berth Managers

Viewing a Berth Profile

- Click Berths on the header.
- Click a berth or pier name's link in the berths column.
- Click Everyone on the header.
- Click your organization's name.
- Click a berth or pier name's link under the Berths label.

Managing a Berth Profile

A user's organization has to be listed as the Scheduling Authority and the user must have the Manage Berths permission to make changes at that berth.

- Navigate to a berth profile.
- Click the Berth name and enter text.
- Draw the berth's physical layout by:
  - Panning and zooming the map to the berth's location.
  - Clicking the polygon icon.
  - Clicking multiple points on the map.
  - Clicking the first point to complete the shape.
  - Clicking the circle icon.
  - Drawing the estimated size or entering in the dimensions.

- Clicking the pencil and pad icon to edit the points of a shape.
- Clicking the trash icon to delete a shape.

  Changes to a Berth's physical layout will affect coordinates listed in the Latitude & Longitude section.

- Select the Physical Address field and enter the berth's location.
- Click the Total Length field and enter a value.
- Click the Max Vessel Draft Allowed field and enter a value.
- Click the Length Buffer field and enter a value.
- Click the Max Start Overhang field and enter a value.
- Click the Max End Overhang field and enter a value.
- Click the Footmarks - Begin field and enter a value.
- Click the Footmarks - End field and enter a value.
- Click the Time Buffer field and enter a value.
- Toggle the Available Mooring Hours.
- Toggle the Multi-Vessel Berthing.
- Click the Berth Transit Offset and enter a value.
- Change Amenities at the berth by:
  - Clicking +Add New.

- Selecting the amenity from the dropdown.
- Clicking and removing it with the x button.
- Clicking Done.

Amenities in the dropdown come from the Amenity List Management in the Berth Manager Settings on your organization's profile.

- Change Capabilities at the berth by:
  - Clicking +Add New.
  - Selecting the capability from the dropdown.
  - Clicking and removing it with the x button.
  - Clicking Done.

Capabilities in the dropdown come from the Tariff Activities Management in the Berth Manager Settings on your organization's profile.

- Click the Notes field to add and edit any additional information about the berth.

Managing Approval Cards

A user's organization has to be listed as a Scheduling Authority and the user must have the Manage Berths permission to make changes to approval cards. Approval Cards apply to all of the organization's berths.

- Navigate to your organization's profile.
- Click Required Harbormaster Approvals.
- Add an Approval Card by:

    - Selecting the title… field and entering text.
    - Selecting the ask a question… field and entering text.
    - Selecting the answer style.

      If multiple choice, add more rows by filling in all of the available rows.
    - Clicking Done to save the card.
- Edit an Approval Card by:
    - Clicking Edit on the card.
    - Selecting the title… field and entering text.
    - Selecting the ask a question… field and entering text.
    - Changing the answer(s).

      If multiple choice, add more rows by filling in all of the available rows.
    - Clicking Delete on the card to remove it.
    - Clicking Done to save the card.

Managing the Amenity List

A user's organization has to be listed as a Scheduling Authority and the user must have the Manage Berths permission to make changes to amenities. Amenities apply to all of the organization's berths.

- Navigate to your organization's profile.
- Click Amenity List Management.
- Add an Amenity by:
    - Clicking +Add Amenity.

    - Selecting the Name field and entering text.
    - Selecting the Description field and entering text.
    - Clicking Done on the row to save it.
- Edit an Amenity by:
    - Clicking Edit on the row.
    - Selecting the Name field and entering text.
    - Selecting the Description field and entering text.
    - Clicking the x button on the row to remove it.
    - Clicking Done on the row to save the change.

Managing the Tariff Activities

A user's organization has to be listed as a Scheduling Authority and the user must have the Manage Berths permission to make changes to tariff activities. Tariff activities apply to all of the organization's berths.

- Navigate to your organization's profile.
- Click Tariff Activities Management.
- Add a Type of Cargo by:
    - Clicking +Add Type.
    - Selecting the Name field and entering text.
    - Clicking Done on the row to save it.
- Edit a Type of Cargo by:
    - Clicking Edit on the row.

        - Selecting the Name field and entering text.
        - Clicking the x button on the row to remove it.
        - Clicking Done on the row to save the change.
    - Add a Trade Route by:
        - Clicking +Add Trade Route.
        - Selecting the Name field and entering text.
        - Clicking Done on the row to save it.
    - Edit a Trade Route by:
        - Clicking Edit on the row.
        - Selecting the Name field and entering text.
        - Clicking the x button on the row to remove it.
        - Clicking Done on the row to save the change.
    - Add a Cargo Category by:
        - Clicking +Add Cargo Type.
        - Selecting the Name field and entering text.
        - Clicking the Unit of Measure dropdown and selecting a unit.
        - Clicking Done on the row to save it.
    - Edit a Cargo Category by:
        - Clicking Edit on the row.
        - Selecting the Name field and entering text.

    - Clicking the Unit of Measure dropdown and selecting a unit.
    - Clicking the x button on the row to remove it.
    - Click <u>Done</u> on the row to save the change.
- Click <u>Done</u>.

Configuring Reminders

A user's organization has to be listed as a Scheduling Authority and the user must have the Manage Berths permission to configure reminders. Reminders apply to all of the organization's berths.

- Navigate to your organization's profile.
- Click <u>Configure Reminders</u>.
- Click the First Reminder field and enter a value.
- Click the Last Reminder field and enter a value.
- Click <u>Done</u>.

Managing an Organization

For User Managers

Editing an Organization Member's Profile

- Click Everyone on the header.
- Access a member's profile by:
  - Clicking their name under your organization's name.
  - Clicking View full profile on the card.
- Or access a member's profile by:
  - Clicking your organization's name.
  - Clicking their name under your organization's name.
  - Clicking View full profile on the card.

For more on editing a profile, see Getting Started – Viewing & Editing Your Information.

Sending a Password Reset

- Navigate to a member's profile.
- Click Send Password Reset in the Actions box under Admin.
- Click OK.

Inviting a Member to Your Organization

- Click Everyone on the header.
- Access the Invite screen by:
  - Clicking Actions.
  - Clicking Invite.

- Or access the Invite screen by:
  - Clicking your organization’s name.
  - Clicking Invite next to Members.
- Click +Invite another person from this organization.
- Enter their email address.
- Click the checkboxes to give them permissions.
- Click Send Invitation.
- Click OK.

Deleting a Member

- Navigate to a member’s profile.
- Click Delete Account in the Actions box under Admin.
- Click Delete.

Changing a Member’s Permissions

- Click Everyone on the header.
- Access the Manage Permissions screen by:
  - Clicking Actions.
  - Clicking Edit Permissions.
- Or access the Manage Permissions screen by:
  - Clicking your organization’s name.
  - Clicking Manage next to Members.
- Click the checkboxes to give and remove member permissions.

Managing the Site

For Site Admins

Deleting a PortCall

Deletes all Reservations and their timeblocks in that PortCall.

- Navigate to a PortCall profile.
- Click Delete PortCall.
- Click Delete.

Managing Organizations

- Click Everybody on the header.
- Add a new organization by:
  - Clicking Actions.
  - Clicking Invite.
  - Clicking +Add a new organization.
  - Selecting the Enter Organization Name field and entering the name.
  - Inviting a member to join the organization.

    For more information, see Managing an Organization – Inviting a Member to Your Organization.
- Delete an organization by:
  - Clicking Actions.
  - Clicking Manage Organizations.
  - Clicking Delete on the organization's row.
  - Clicking Delete.

Managing Ports

Ports can only be added by PortCall.com Support.

- Click More on the header.
- Click Site Admin Settings.
- Click Berth Lookups.
- Edit a port name by:
    - Clicking Edit on the row.
    - Selecting the Name field.
    - Entering text.
- Arrange ports by:
    - Dragging a row up and down.
- Add a port capability by:
    - Clicking +Add Capability.
    - Selecting the Name field.
    - Entering text.
    - Clicking Done on the row to save it.
- Edit a port capability by:
    - Clicking Edit on the row.
    - Selecting the Name field.
    - Entering text.
    - Clicking and removing it with the x button.
    - Clicking Done on the row to save the change.
- Click Done.

Managing Berths

Berths can only be removed by PortCall.com Support.

- Click More on the header.
- Click Site Admin Settings.

- Click Manage Berths.
- Arrange berths by:
  - Clicking Arrange Berth Order.
  - Dragging berths up and down.
  - Clicking Done in the Actions box.
- Link berths by:
  - Clicking Link Berths.
  - Select a checkbox on two or more rows.
  - Dragging berths up and down.
  - Clicking Link Berths.
  - Clicking Done in the Actions box.
- Click Unlink to separate berths.
- Add a berth by:
  - Clicking Add Berth.
  - Entering information for each field.

    For more information, see Managing a Berth – Managing a Berth Profile.
  - Clicking <<Back.
- Click Done.

Trouble Shooting

Getting Help

- Click the Help link on the black header.
- An email should automatically open in your mail client (Outlook, Gmail, etc.).

  If an email does not automatically appear, open your mail client and type support@PortCall.com into the address field.
- Enter the Subject.
- Enter your question, problem, or concern in the content.
- Send.