

# ***UNOLS Ship Time Request and Scheduling System (STRS)***

## ***Introduction and Guide to Getting Started***

### **Introduction**

The new UNOLS Ship Time Request and Scheduling System has been under development for a number of years. This new system will replace and improve upon the old Ship Time Request System and Scheduling System with an SQL Server Database driven system that integrates ship time requests and scheduling data and eventually post cruise reporting information. This document provides an overview and instructions on how to start using this system as a beta-tester.

This system is still under construction, but we are at the point where the Ship Time Request (STR) functions of this new system need to be beta-tested by real users so we can receive feedback on areas that need improvement or that do not work properly. We are confident that the system will function well enough to fulfill your requirement for submitting a ship time request with NSF or ONR Proposals.

- We are asking that you use this new system to create your new ship time requests. We will preserve your work as part of the final system.
- Please provide feedback or descriptions of any problems that you may encounter while using this system by clicking on the **Comments/Suggestions** link near the top of the screen.
- This system will submit your STR to the same people that the old system does and will be used by program managers, ship schedulers and the UNOLS office to track the status of your request and for scheduling purposes.
- It will also allow you to create text versions of your STR to submit with your proposals.

### **Benefits to PI's, Schedulers and Program Managers**

- Single point of entry for access to all ship time requests, schedules and reports.
- Direct link between ship time requests and schedules ensuring better match of requirements in request to scheduled cruises.
- Database driven application that will allow expanded capabilities such as rough cruise tracks, utilization tracking, auto-completion and duplication of repeated information such as contact info, repeat cruises, re-submitted proposals, etc.
- Enhanced tools for comparing and modifying schedules and for creating multiple scheduling scenarios.

**Changes from previous system**

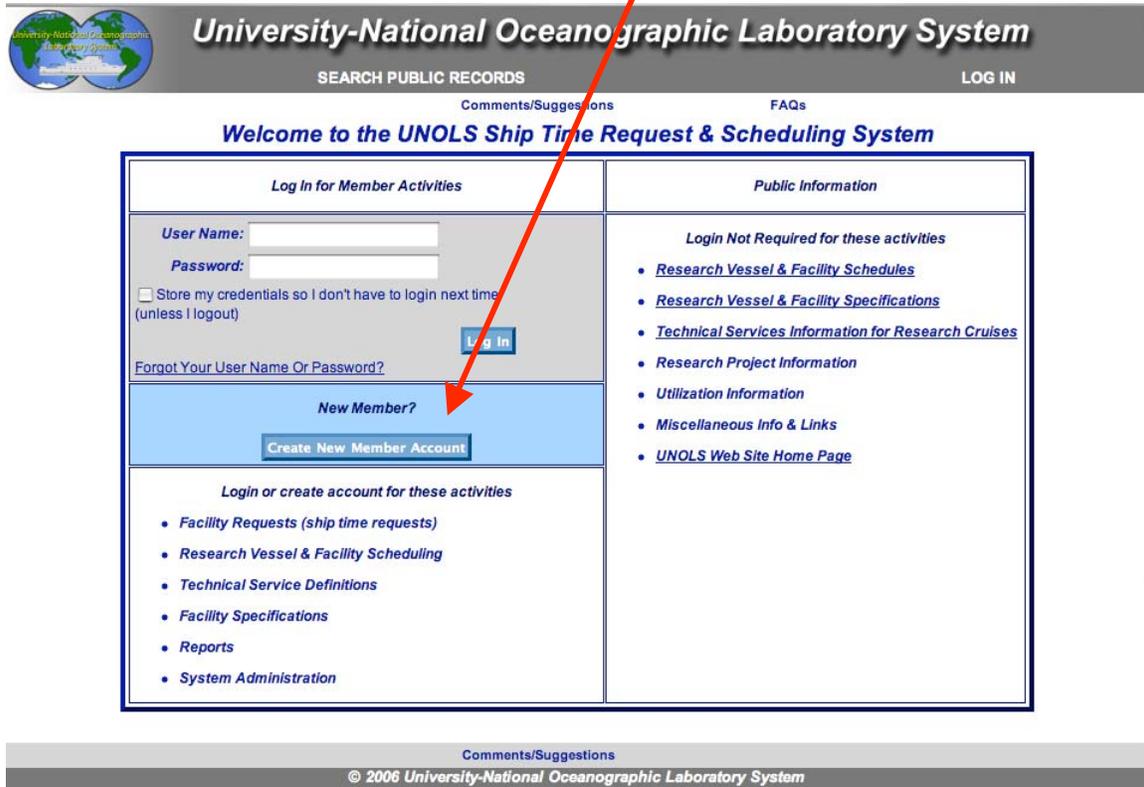
- You will create and login with a user account that will give you access to your past and present ship time requests.
- You will only have to enter your personal contact information once and only edit it when necessary.
- You will only have to remember one password for all your ship time requests.
- You can authorize Co-PI's and other system users to edit or help your ship time requests.
- You will be able to create new or renewal requests and proposal/project information by duplicating existing documents.
- Allows more flexibility in creating requests for different areas, vessels, etc for one proposal and provides more information to schedulers.

## Getting Started as a NEW USER

1. Go to website -

<http://www.unols.org/strs>

2. Click on the Create New Member Account Button:



The screenshot displays the UNOLS Ship Time Request & Scheduling System interface. At the top, there is a header with the UNOLS logo, the text "University-National Oceanographic Laboratory System", and navigation links for "SEARCH PUBLIC RECORDS", "Comments/Suggestions", "FAQs", and "LOG IN". Below the header, a blue banner reads "Welcome to the UNOLS Ship Time Request & Scheduling System".

The main content area is divided into two columns:

- Left Column:**
  - Log in for Member Activities:** Includes fields for "User Name:" and "Password:", a checkbox for "Store my credentials so I don't have to login next time (unless I logout)", a "Log In" button, and a link for "Forgot Your User Name Or Password?".
  - New Member?:** A blue box containing a "Create New Member Account" button, which is highlighted by a red arrow.
  - Login or create account for these activities:** A list of activities including Facility Requests (ship time requests), Research Vessel & Facility Scheduling, Technical Service Definitions, Facility Specifications, Reports, and System Administration.
- Right Column:**
  - Public Information:** A section titled "Login Not Required for these activities" with a list of links: Research Vessel & Facility Schedules, Research Vessel & Facility Specifications, Technical Services Information for Research Cruises, Research Project Information, Utilization Information, Miscellaneous Info & Links, and UNOLS Web Site Home Page.

At the bottom of the page, there is a footer with "Comments/Suggestions" and "© 2006 University-National Oceanographic Laboratory System".

3. Enter required information:

- Login Name and Password - These will be used to access all of your ship time requests, schedules, reports and member information. You will no longer need to enter a password for each ship time request. Also, if you forget your password and login name, it will be emailed to your primary email address if you click on “forgot your password?” on the login page.
- Enter contact information (required fields have a red asterisk).



## University-National Oceanographic Laboratory System

SEARCH PUBLIC RECORDS

LOG IN

[Comments/Suggestions](#)

[FAQs](#)

### Please Enter Your Information

\* = required field

<b>USER NAME:</b> *	<input type="text"/>	<b>PASSWORD:</b> *	<input type="text"/> * <small>Minimum 4 characters/digits.</small>
<b>Prefix/title:</b>	<input type="text"/>	<b>RE-ENTER PASSWORD:</b> *	<input type="text"/>
<b>FIRST NAME:</b> *	<input type="text"/>	<b>EMAIL:</b> *	<input type="text"/>
<b>Middle Name:</b>	<input type="text"/>	<b>PHONE:</b>	<input type="text"/> - <input type="text"/> - <input type="text"/> x <input type="text"/> * <small>Non-Standard</small>
<b>LAST NAME:</b> *	<input type="text"/>	<b>Job Title:</b>	<input type="text"/>
<b>Suffix:</b>	<input type="text"/>	<b>Department:</b>	<input type="text"/>
<b>Nickname:</b>	<input type="text"/>	<b>Gender:</b>	<input type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Not Specified
<b>INSTITUTION:</b>	<input type="button" value="Select Institution"/> *		
<b>Second Institution:</b>	<input type="button" value="Select Institution"/>		
<small>Your address will default to the address of your first institution unless it is defined below</small>			
<b>Address:</b>	<input type="text"/>	<b>2nd Phone:</b>	<input type="text"/> - <input type="text"/> - <input type="text"/> x <input type="text"/> <small>Non-Standard</small>
<b>Address line 2:</b>	<input type="text"/>	<b>Alt. Email:</b>	<input type="text"/>
<b>City:</b>	<input type="text"/>	<b>Fax #:</b>	<input type="text"/> - <input type="text"/> - <input type="text"/> x <input type="text"/> <small>Non-Standard</small>
<b>State:</b>	<input type="text"/>	<b>Web Page:</b>	<input type="text"/>
<b>Zip:</b>	<input type="text"/> - <input type="text"/>	<b>2nd Web Page:</b>	<input type="text"/>
<b>Country:</b>	<input type="text"/>		
<b>Have you read Chapter One of the R/V Safety Training manual?</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No		
<b>Description of interests or comments:</b>	<input type="text"/>		
	<small>Remaining Characters: 8000</small>		

[Comments/Suggestions](#)

- Choose an institution from the list of institutions by clicking on “Select Institution”.

### ***Institution Search***

Please enter information for the institution you are looking for

***Institution Name:***

***Institution Abbreviation:***

***City:***

***State:***

***Country:***

Can't find the institution you are looking for? Try typing the first letter or two of any of the institution name, abbreviation, city, or country.

**If you are SURE that your institution is not already in the UNOLS System:**

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- The easiest way to search for institutions is to enter the state and then browse the list.
- Select the one through which you would submit most of your proposals or where you are primarily employed. You can choose a second institution if that is appropriate for your circumstances.

- If your institution is not listed (and you are sure), then click on “Create A New Institution”.

**Please Enter The Information For The Institution**

\* = required field

**INSTITUTION NAME:**  \*

**INSTITUTION ABBREVIATION:**  \*

**Institution Address:**

**CITY:**  \*

**State:**

**Zip code:**  -

**Country:**

**Web page:**

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- Enter and submit information and then the new institution will be entered into the system and you will be able to select it on the Select Institution page.
- Duplicate the process for the second institution if necessary.
- We ask you whether or not you have read the Research Vessel Safety Training Manual - Chapter One. Please answer truthfully. There is a link to this manual online in the online help or from the UNOLS Homepage:  
[http://www.unols.org/publications/manuals/safe\\_man.html](http://www.unols.org/publications/manuals/safe_man.html)
- You can enter your own personal address or a more specific work address, web page info and comments that you may want others to read about you, but these are all optional. Most transactions involving this system will use your primary email address for messages and notifications.
- Hit “Submit Info” when completed and you will be taken to your “Member’s Home Page”.

## Member's Home Page

**University-National Oceanographic Laboratory System**

SEARCH PUBLIC RECORDS    USER HOME    LOG OUT

Suggestions/Request Help    Frequently Asked Questions    < Back

**ap mem's User Information Home Page**

How do I use the User Home Pages?

User Information    **Principal Investigator**    Customize Homepages

There are many differences between this system and the one you are used to.  
If you are having trouble, please check the [Frequently Asked Questions](#).  
If you still can't find your answer, click on [Suggestions/Request Help](#) and let us know what your question or problem is.  
Someone will help you as soon as possible.

**System Announcements**

test

This is a demonstration announcement

You can use HTML and go to [google](#)

There is also a scroll functionality as demonstrated by this:

...

...

...

...

...

...

**Member Account Information - [Edit](#) (edit contact info and password)**

<b>ap mem</b>	<b>User Name:</b> apmem	<b>Date Last Modified:</b> 10/2/2007
	<b>Job Title:</b> Job Title Not Defined	<b>Department:</b>
<b>Institution:</b>	<b>Second Institution:</b>	<b>Address:</b>
Argonne National Laboratory (ANL) 9700 South Cass Avenue Argonne, IL 60439 USA	Second Institution Not Defined	9700 South Cass Avenue Argonne, IL 60439 USA
<b>Phone:</b> (888) 888-8888	<b>Email:</b> apmem@test.test	<b>Web Page:</b> Not Defined
<b>Phone (alt):</b> Not Defined	<b>Alternate Email:</b> Not Defined	<b>Web Page 2:</b> Not Defined
<b>Fax:</b> Not Defined		

**Comments and Info:**

This space can be used to summarize the type of work you do or give references to information that would be useful for schedulers, program managers or Pls.

Have you read the R/V Safety Training Manual chapter one? **No**

Home    Suggestions/Request Help    < Back

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4. In future you will go to the login page at the beginning of this document and enter your login name and password, which will take you to this home page.

From here you can create, review and edit your ship time requests and get direct access to any “published” schedules based on your ship time requests or those where you are listed as a Co-PI. Additional functions related to cruise planning and post cruise reporting will be added in the future.

5. *New Home Page Information:*

On your user home page you will see system. We will use this section to notify users of any planned maintenance periods for the system. Below the announcements is your member information. We request that you keep this as up to date as possible. This information is tied directly to your Requests. You can change your personal information by clicking on the edit button. (NOTE: This page is not customizable.)

There are also “tabs” across the top of the box that help organize your home pages. When you first create your account you will automatically receive a “Principal Investigator” tab. This is where you will create your Ship Time Requests as well as see the ship schedules that are using your ship time requests. (NOTE: The tabs may be slightly different depending on your permissions in the system.)

User information
Principal Investigator
Customize Homepages

### Projects

[New Project](#) | Page Size: (Unlimited) | [How do I create a Ship Time Request?](#)

**Filter Projects/Requests By:**

	Project Short Title	Start Date	PI	Status	# Requests	
<a href="#">View</a>	test workflow	Oct 10, 2007	mem, a	Submitted	2	<a href="#">Show Requests</a>
<a href="#">View</a>	Draft-Any Status	Jan 01, 2008	mem, a	Submitted	1	<a href="#">Show Requests</a>
<a href="#">View</a>	Submitted-Funded	Jan 01, 2008	mem, a	Submitted	1	<a href="#">Show Requests</a>
<a href="#">View</a>	Submitted-Declined	Jan 01, 2008	mem, a	Submitted	1	<a href="#">Show Requests</a>
<a href="#">View</a>	Submitted-Withdrawn	Jan 01, 2008	mem, a	Submitted	1	<a href="#">Show Requests</a>
<a href="#">View</a>	Submitted-Pending	Jan 01, 2008	mem, a	Submitted	1	<a href="#">Show Requests</a>
<a href="#">View</a>	Submitted-TBS	Jan 01, 2008	mem, a	Submitted	1	<a href="#">Show Requests</a>
<a href="#">View</a>	Request-Funded-DSW	Jan 01, 2008	mem, a	Submitted	3	<a href="#">Show Requests</a>
<a href="#">View</a>	Withdrawn-Funded	Jan 01, 2008	mem, a	Withdrawn	1	<a href="#">Show Requests</a>
<a href="#">View</a>	Withdrawn-Declined	Jan 01, 2008	mem, a	Withdrawn	1	<a href="#">Show Requests</a>
<a href="#">View</a>	Withdrawn-Withdrawn	Jan 01, 2008	mem, a	Withdrawn	1	<a href="#">Show Requests</a>
<a href="#">View</a>	Withdrawn-Pending	Jan 01, 2008	mem, a	Withdrawn	1	<a href="#">Show Requests</a>
<a href="#">View</a>	Withdrawn-TBS	Jan 01, 2008	mem, a	Withdrawn	1	<a href="#">Show Requests</a>
<a href="#">View</a>	Request-Withdraw-DSW	Jan 01, 2008	mem, a	Submitted	3	<a href="#">Show Requests</a>
<a href="#">View</a>	Request-Declined-DSW	Jan 01, 2008	mem, a	Submitted	3	<a href="#">Show Requests</a>
<a href="#">View</a>	Request-FWithdra-DSW	Jan 01, 2008	mem, a	Withdrawn	3	<a href="#">Show Requests</a>
<a href="#">View</a>	Request-DWithdra-DSW	Jan 01, 2008	mem, a	Withdrawn	3	<a href="#">Show Requests</a>
<a href="#">View</a>	Draft		mem, a	Draft	2	<a href="#">Show Requests</a>
<a href="#">View</a>	Funded - testing mul	Jan 01, 2007	mem, a	Submitted	1	<a href="#">Show Requests</a>
<a href="#">View</a>	new project	Jan 01, 2009	mem, a	Draft	1	<a href="#">Show Requests</a>
<a href="#">View</a>	test short title	Jan 01, 2009	Dippold, L	Submitted	2	<a href="#">Show Requests</a>
<a href="#">View</a>	test workflow	Oct 10, 2007	mem, a	Submitted	2	<a href="#">Show Requests</a>

### Schedules

Page Size: (Unlimited)

	Year	Ship
<a href="#">View</a>	2002	Point Sur

The “Customize Homepages” tab on the right allows you to change what you see on your Principal Investigator tab as well as add new tabs.

### Customize Your Homepage(s)

- To create new or customize your homepages do the following:
1. To create a new homepage, enter a "Homepage Name" in the text box and click "Create New Homepage".
  2. Choose the homepage you wish to customize in the drop down menu.
  3. Click "Add" to choose the type of information you would like to see on your homepage.
  4. Click on you the homepage you would like to go to from the "User Home" menu above to return to your homepages.

NEW HOMEPAGE NAME:

Principal Investigator - (rename page)	↑ ↓ ✕
Projects And Requests	↑ ↓ ✕
STR Associated Schedules	↑ ↓ ✕

Principal Investigator ▾

**STR Associated Schedules**   
Displays the schedules that are associated with STRs that you are in any way related to.

**Projects And Requests**   
Displays a filterable list of all projects and requests that you are in any way related to.

**All Schedules**   
Displays a filterable list of all schedules that you have access to.

**All Requests**   
Displays a filterable list of all requests that you have access to

To create a new home page tab first enter the name that you want to call the tab in the text box, then click “Create New Home Page.” To modify what is already on your home page you can change the order by using the up and down arrows, or delete the item by using the red “X”. To add new sections to your pages, first select the page that you wish to add to with the drop down menu. Then click on the “Add” button for what you want to put on it. (NOTE: The items that you can add may differ from those shown here depending on your permissions.)

[View Help Document for Creating Ship Time Requests and Projects](#)