



IMOS V.5

Integrated Maritime Operations System

Operations Quick Start Guide

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IMOS Operations

To access the IMOS Operations Center, click the **Operations** tab.

Vessel Schedule

To see an overview of your fleet's historical, current, and future voyages, in the Operations Center, click  **Vessel Schedule** or . From the Vessel Schedule, you can access the Voyage Manager, Fixture Note or Time Charter Manager, Voyage Estimate, and Laytime Calculator.





Port Schedule

To see an overview of your vessels by port, in the Operations Center, click  **Port Schedule** or . From the Port Schedule, you can access the Voyage Manager.




Fleet Map

To see a map with current or open positions of your vessels or routes of individual vessels, in the Operations Center, click  **Fleet Map** or .

New Voyage Setup

- To create a voyage, do one of the following:
 - From the Operations Center, click  **Voyage Manager**.
 - From the Vessel Schedule, the Port Schedule, the Payment Schedule, or the Billing Schedule, click .
 - From the Voyage Manager, click  and then click **Create a new voyage**.
 - From the Time Charter Out Manager, click .
- On the New Voyage Setup form, enter the **Vessel Name**; IMOS displays the **Vessel Code**.
- To insert the voyage before another voyage, select the **Insert Voyage Before** check box and select the voyage before. IMOS gives this voyage that number. To have IMOS automatically assign the next voyage number, select the **Assign voyage number automatically** check box. Otherwise, enter a **Voyage Number**.
- A consecutive voyage starts immediately after the previous voyage of the same vessel. To schedule the voyage immediately after the last scheduled voyage for the vessel, select the **Consecutive voyage** check box. Otherwise, enter a **Commencing** date.
- To create the voyage from a Fixture Note, select the **Create voyage from fixture note** check box. The Fixture Note must already exist. If there are multiple Fixture Notes, select the **Fixture Note** from the list that appears.
- Select an **Operation Type**.
- Click **OK**. If this is not a consecutive voyage, complete the **Initial Bunkers** form. The Voyage Manager appears.


Voyage Manager

1. Complete fields not pulled in from a previous form:
 - a. Enter a **Vessel**; IMOS displays the **Vessel Code**.
 - b. If this is not a consecutive voyage, enter a **Voyage Number**.
 - c. Complete additional fields as appropriate: **TC Code** (if this is a charter); **Operation Type**; **Bunker Calculation Method**; for each port, **Port Name** and **Port Function**.
 For a consecutive voyage, IMOS enters the last port from the previous voyage as the beginning port and enters the bunker prices from the previous voyage.
2. To save the voyage, click .
3. When the voyage begins, select the **Commenced** check box. The status for the first port changes to **Sailed**.
4. As you continue through each port, right-click the port line and click **Port Activities** to enter **Port Activities for the Voyage** (below).
 IMOS updates the itinerary with any changes; actual arrival and departure times are in black; estimated times are in blue.
5. To enter **Port Call Expenses** (p. 5), right-click the port line and click **Port Expenses**.
 As you enter financial information, it appears in the **Voyage Profit/Loss** table.
6. Enter **Cargo for the Voyage** (p. 5).
7. A red port line in the itinerary warns of low fuel. To work with **Bunkers for the Voyage** (p. 5), click .
8. To enter revenues or expenses not associated with a port or with freight, click .





Port Activities for Voyage

1. To enter port activities, right-click the port line and click **Port Activities**.
2. In the Activity table, enter a **Date** and **Time** for each activity.
 Before you can enter bunker information, a date and time must be entered for the End of Sea Passage. If you receive bunkers, enter the amount **Received**.

 For cargo-related activity, make sure that you select the cargo loaded in the **Cargo** column. If there is more than one cargo, enter individual start and end loading and discharging operations for each cargo.


 You can add activities at the bottom of the list or right-click to insert a line. Be sure to add both start and stop entries for activities such as Start Bad Weather and End Bad Weather.
3. To save the record, click . Any bunker quantities received appear on the **Bunkers for Voyage** form (below), so you can create a Bunker Invoice.


Bunkers for Voyage

1. In the Voyage Manager, click . The Bunkers for Voyage form has a Summary tab and a detail tab for each fuel type. On the detail tab, enter any bunkers you plan to **Receive**; IMOS enters the previous price.
2. To perform a Bunker Inquiry, right-click the port line and click **Bunker Inquiry**. For each **Vendor**, enter the associated costs. To select a vendor, click . You must select a vendor, even if there is only one, to have IMOS use the inquiry price for that type of bunker.
3. In Port Activities for Voyage, after entering the date and time for the End of Sea Passage, enter the amount **Received**. It appears under Bunker Price Binding.
4. To create a purchase order, on the Bunker Inquiry form, click ; to create an invoice (to record the invoice received), click .


Port Call Expenses


1. To enter port expenses, do one of the following:
 - Right-click the port in the Voyage Manager and click **Port Expenses**. On the **Estimated Port Exp** form, enter the **Estimated Port Expense** and click **Make Port Disbursement**.
 - In the Operations Center, under Port Costs, click **Advances/Disbursements**.
2. On the Port Call Expenses form, select the **Agent Short Name**.
3. To record an advance payment:
 - a. In the **Proforma Sent** field, enter the estimated expense sent date, and enter the **Advance Invoice No.**

Note: You must enter this information before you can enter costs.
 - b. In the table on the right, in the **Est In Curr** column, enter the actual advance payment to the agent, in the local currency of the agent.
 - c. Select the **Actual (Adv)** check box and click .
4. To record a final payment, when you receive the Agent statement:
 - a. In the **Final Exp Sent** field, enter the final invoice date, and enter the **Disb Invoice No.**

Note: You must enter this information before you can enter costs.
 - b. In the table on the right, in the **Act In Curr** column, enter the disbursement against the advance, in the local currency of the agent.
 - c. Select the **Actual (Final)** check box and click ; IMOS generates an invoice to appear in Financials.




Cargo for Voyage

1. To enter information about cargo, do one of the following:
 - In the Voyage Manager, right-click the port and click **Cargo Handling**.
 - On the Port Activities for Voyage form, click .





2. On the Cargo for Voyage form, in the **Grade** column, click the first empty cell. Click **Discharge cargo** or **Load cargo** and select the cargo.
3. Complete the remaining fields as appropriate. To enter information about cargo documents, suppliers, or additional figures for cargo quantities/units, right-click the cargo line and click a menu command.
4. To save the information, click .

Freight Invoice

To be able to create a Freight Invoice, a Fixture Note must exist, with Freight Terms and Extra Freight Terms completed for all cargoes loaded, and the Cargo for Voyage form must be completed and the cargoes bound to the Fixture Note.

1. To create a Freight Invoice for freight sales or purchases, do one of the following:
 - In the Voyage Manager, click  and then click **Freight Invoice**. The form opens with information from the Voyage Manager.
 - In the Operations Center, under Freight, click **Freight Invoice** and enter the **Vessel Name** and **Voyage Number**.
2. Select the **Charterer**.
3. Enter the **Invoice Date**.
4. To deduct commissions from the invoice, select the **Include commission** check box. Otherwise, use the Freight/Relet Commission Payment form to enter and process invoices for brokerage on freight sales and purchases that were not deducted.
5. To invoice the receiver instead of the charterer, select the **Receiver** check box.
6. If the percentage to be invoiced is not 100%, change the **% Inv** to the appropriate percentage. (IMOS enters the remaining percentage on the next invoice.)
7. To save the information, click . IMOS generates the **Invoice Number**. If the Invoice Date is blank, IMOS sets it to today's date; if the Due Date is blank, IMOS sets it to 30 days after the Invoice Date.
8. To print the invoice, click  and select the bank, if it was not selected on the Freight Invoice. You can print, save, or email the invoice or create a PDF.

Freight/Relet Commissions

1. For commissions not deducted from the Freight Invoice, do one of the following:
 - In the Operations Center, under Freight, click **Commissions** and enter the **Vessel Name** and **Voyage Number**.
 - On the Voyage Manager, click .
2. On the Freight/Relet Commission Summary, to display payments for a voyage, click , enter criteria, and click **Retrieve**.
3. To create a payment, click .
4. Select the **Broker**. Each possible payment appears, with the **C** (Commissionable) check box selected.
5. Enter the broker's **Invoice No.** and the **Date**.
6. Select the **Actual** check box and click ; the invoice appears in Financials.




Time Charters

For information on creating a Time Charter In Fixture, a Time Charter Out Fixture, or a Time Charter Out Estimate, see the *IMOS Chartering Quick Start Guide*.

Payment Schedule

To see an overview of the status of payments for hired vessels, in the Operations Center, under Time Charter In, click **Payment Schedule**.





Time Charter Payment



1. To create a Time Charter Payment, do one of the following:
 - In the Operations Center, under Time Charter In, click **Payments**. Select a **TC Code**.
 - On the Payment Schedule, double-click a payment. Red = due or past due.
 - In the Time Charter In Manager, click .
2. Enter the **Issue Date** and the **Invoice Number**.
3. Complete the remaining fields as appropriate.
4. To select the Time Charter Payment Details you want to appear, click . Items you select appear as line items.
5. To save your changes, click .
6. After payment is made, select the **Actual** check box to send the payment to Financials for processing.

Billing Schedule



To see an overview of the status of bills for hired vessels, under Time Charter Out, click **Billing Schedule**.

Time Charter Bill

1. To create a Time Charter Bill, do one of the following:
 - In the Operations Center, under Time Charter Out, click **Billing**. Select a **TC Code**.
 - On the Billing Schedule, double-click a bill. Red = due or past due.
 - In the Time Charter Out Manager, click .
2. The **Issue Date** defaults to today's date; enter the **Due Date**.
3. To select the Time Charter Billing Details you want to appear, click . Items you select appear as line items. IMOS adds the amounts and deducts the Commission charge from the amount due.
4. Complete the remaining fields as appropriate.
5. To select the Time Charter Billing Details you want to appear, click . Items you select appear as line items.
6. To save your changes, click . IMOS generates an **Invoice Number**.
7. Select the **Actual** check box to send the bill to Financials.

8. To print the invoice, click  and select the bank, if necessary. You can print, save, or email the invoice or create a PDF.
9. When you receive a payment, do one of the following:
 - On the Time Charter Bill, click .
 - On the Billing Schedule, right-click the bill against which a payment has been received and click **Enter Received Amount**.
10. On the Received TC Payment form, enter the received amount in the **Paid Amt** field.

Hire Statement

1. To open a Hire Statement showing everything paid and outstanding over the course of the hire, do one of the following:
 - In the Time Charter In Manager or the Time Charter Out Manager, click .
 - In the Operations Center, under **Time Charter In** or **Time Charter Out**, click **Hire Statement**. Enter the **Vessel Name**. Invoices appear, with the **Amount Paid**.
2. To print a Hire Statement or a Statement of Accounts, click .
- The Hire Statement covers the whole hire; at the end of the contract, a charterer might send the owner the Hire Statement, showing the balance.
- The Statement of Accounts shows the position at any point; a charterer might send it with each payment.


Reports

Operations Reports

Select a report from one of these locations:

- Operations Center Reports list (top right)
- Vessel Schedule Report list (bottom right)







Voyage Manager Reports

In the Voyage Manager, to print the Profit and Loss Report, Voyage Operation Report, or Voyage Performance Report, click  and select the report.



Ad-hoc Reports

Creating a Report



1. Click .
2. At a minimum, enter a **Title** and select a **Dataset**.

3. At each category, click  to expand the options:
 - **Columns:** Select fields on the left and click . To change the column sequence, click a column name and then click:
 -  To move to the beginning.
 -  To move up.
 -  To move down.
 -  To move to the end.
 - **Filtering:** For each filter, select:
 - Criteria
 - An operator
 - Either **the value** (enter a value) or **<ask the user>**
 - **Sorting/Grouping:** For each group, select a sorting mechanism and a field to sort by.
 - **Totals:** For each column to total, select the **Total** check box and the type of total.
 - **Layout:** Select one:
 - Use company defaults
 - Set custom layout: Orientation, printing filter settings, text size, showing column headers on every page, and using smart pagination.
 - **Logo, Headers, and Footers:**
 - Select an image and its placement.
 - Select header information and placement.
 - Select footer information and placement.
4. Click **Save**. The report appears under My Reports.

Running a Report

- Built-in Reports:
 1. Find the report under Built-in Reports and click [Run Report](#) in its row.
 2. Enter any selection criteria and click .
 3. For a report you created, enter any answers to <ask the user> questions and click .
- My Reports:

Find the report under My Reports and click one of the following in its row:

 - [Run Report](#): Enter any answers to <ask the user> questions and click .
 - [XML](#): Enter any answers to <ask the user> questions and click .
 - [CSV](#): Enter a location and file name and click **Save**.