iPortman PORTAL Application

Exporter User Manual

ENVISION ENTERPRISE SOLUTIONS PVT LTD	Doc Reference No:	
User Manual for iPortman PORTAL Application	TMP/UMG/V.1.0	

Revision History

Version	Author	Revision Date	Description of Changes	Modifier	Approver	Baseline Date
1.0	Bikash Bijaya Panda		Initial Version			

	ENVISION ENTERPRISE SOLUTIONS PVT LTD	Doc Reference No:	
envision empowering enterprise	User Manual for iPortman PORTAL Application	TMP/UMG/V.1.0	iPortman

Contents

ABOUT DOCUMENT

1. Document Versioning

Document Amendment Record

I-Initial, *A-Added, M-Modified, D-Deleted

Version No.	Date	I/A/M/D*	Section No.	Description of Change
V1.0		I		Baseline

2. Purpose

This document is prepared to help the users who access the application to enter the new records and also to manage the existing records within the access control configured.

This helps user to understand the description of the application/business form and how to operate it.

3. Target Audience

The following are target audience of this document

1. Business Users who use iPortman PORTAL application
2. User who accesses the iPortman PORTAL application to learn

4. Disclaimer Clause

NA

I. ABBREVIATION

Following Abbreviations are from Import Related Functions.

S.No.	Abbreviation	Description
1	IGM	Import General Manifest
2	VCN	Vessel Call Number
3	CARGO TYPE	
	I. C	Containerized
	II. P	Packaged
	III. LB	Liquid Bulk
	IV. DB	Dry Bulk
	V. CP	Part of the consignment is containerized and remaining is packaged but not containerized
4	Item Type Code	
	I. GC	Govt Cargo
	II. OT	Other Cargo

	III. UB	Unaccompanied Cargo
5	HSS	High Sea Sales
6	IEC Code	Importer & Exporter Code
7	UNO Code	
8	IMCO Code	
9	Message Type I. F II. S III. D IV. A	 Fresh Supplementary Delete Amendment
10	Out of Charge Type Name I. F II. P	 Full Partial
11	UOM CODE	Unit Of Measurement Code
12	Delivery Stage I. F II. P	 Full Partial
13	ETA	Estimated Time of Arrival
14	ETD	Estimated Time of Departure
15	RFID	Radio Frequency Identification
16	TAT Hours	Turn Around Time in Hours
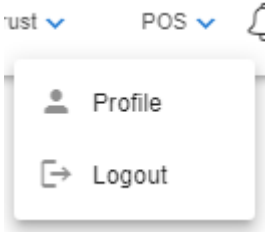
II.   ERROR MESSAGES CODES AND DESCRIPTIONS

#	Error Code	Full Name / Description	Steps to Solve / Who to contact
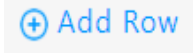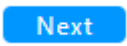
III.   SYMBOLS AND ICONS

SR No.	Symbol / Icon	Purpose / Usage
1	Port Name: Deendayal Port Trust ▼	Based on user login and Site ID set for user, Port Name will reflect in header screen after successfully login. Based on 'Port Name' shown user will be able to access the assigned functions pertaining to the respective port only.

2		Notification Bell it will alert user for pending action items
3		Weather Forecast
4	Profile / Logout	This icon is for user profile, from where user can access following items. 1. USER PROFILE AS SET BY THE ADMINISTRATOR 2. PROFILE SETTINGS 3. LOGOUT BUTTON
5		Menu button – To display the list of processes
6		Search box – To search the processes
7		Check List Button
8		New button – To create a new record
9		Save button – To save a record
10		Cancel button – To cancel a record
11		Extension button – To extend a record
12		Workflow button – To Approve/Reject a record
13		Partial
14		This icon is used to view the success status of the record
15		Shows the status of the record
16		Shows the Success status of the record
17		List Data – To render a list of records(draft/wfapp/approved/rejected/cancelled)
18		Clear Filter – To clear the searched records

19		Advanced Search – To search a record with multiple search criteria
20	⊕ Add Row	Add Row button - Is to add multiple line items
21		This icon is to close each line item
22	Next	Next button – To Navigate next screen
23	Back	Back link – To Navigate previous screen
24	>	This icon is to expand the line item
25	▲	This icon is to Collapse the section within the function/page
26	▼	This icon is to expand the particular section within the function/page
27	<	Left Pagination button – To see previous results
28	>	Right Pagination button – To see next results
29	✓ Record saved	This is LOV icon displayed only once data is saved successfully
30		This icon is for sending the data for approval to the authorized person
31		This icon is to approve the data after verification
32	Accept Decline	These icons are used to Accept or Decline the request
32		This icon is used to Import the data
33		This icon is used to Upload a document
34		This icon is used to Download a document

IV. BUSINESS FLOW DIAGRAM FOR TRAFFIC NON-CONTAINER IMPORT

Following process flow for Import Non-Container General Cargo
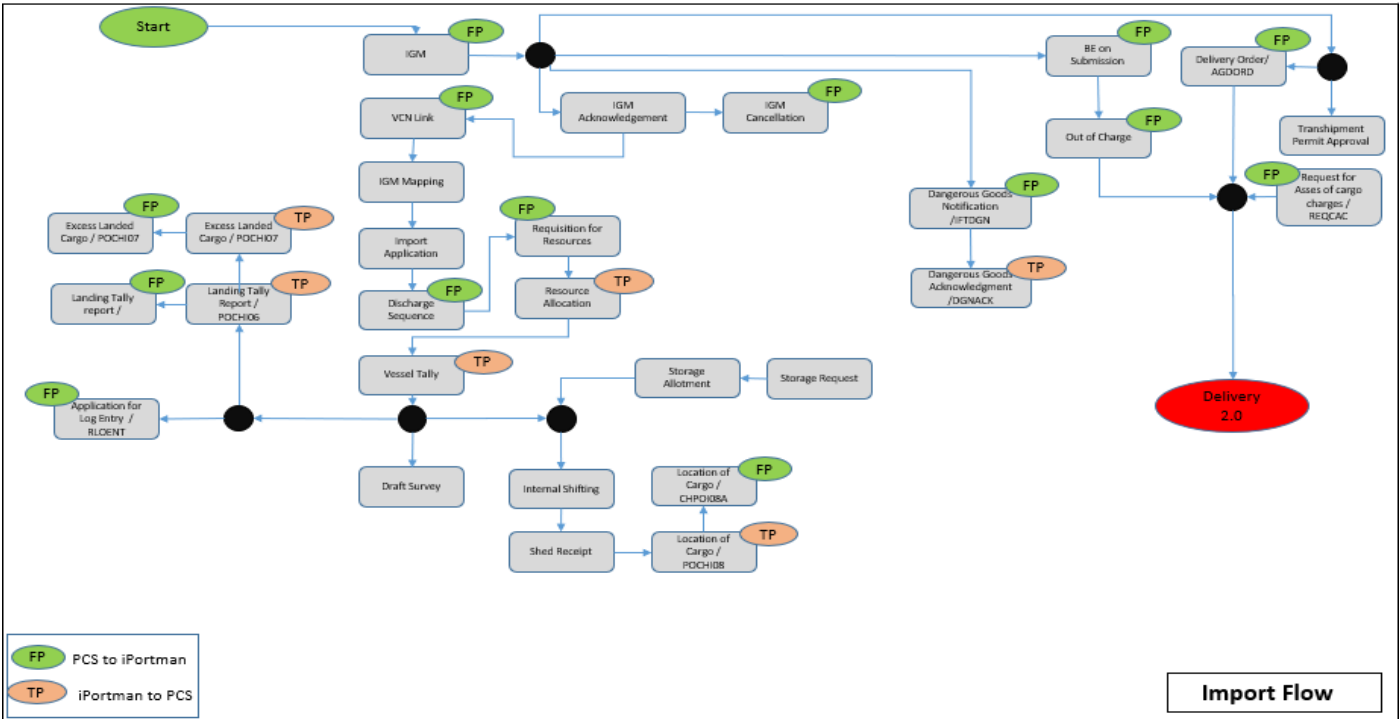
V. APPLICATION VIEW/ UI DESCRIPTION

NA

VI. BUSINESS PROCESS FOR TRAFFIC
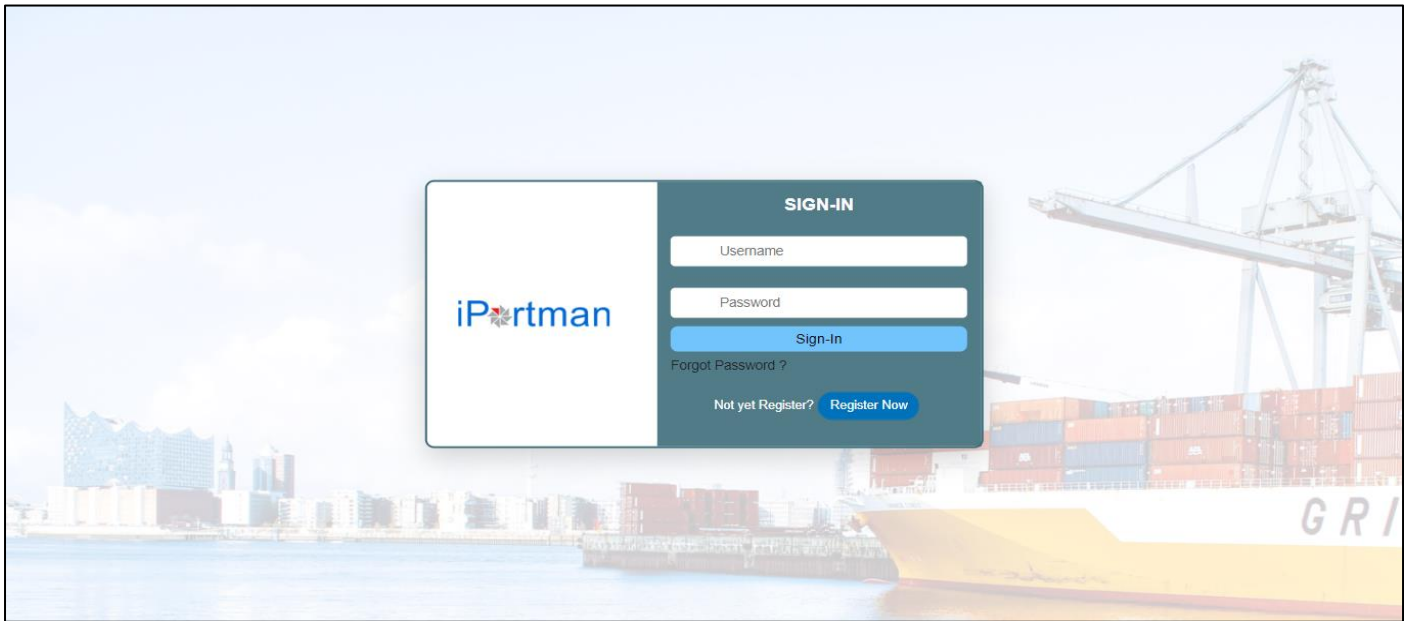
User Interface Image I-Login Screen

Welcome to iPortman

Workflow Activity Records | Cancelled Records

Draft/Doc No	Application Name	Submitted By	Submitted Date and Time	Status	Last Action Date and
Search	Search	Search	Search	All	Search
INPRT1-2022-00036	Carting Permission	Paradip Integration User,DEFAULT DEPARTMENT	14-10-2022 17:56	APPROVED	14-10-2022 17:58
11235	Confirmation of Charges - Vessel	Paradip Integration User,DEFAULT DEPARTMENT	14-10-2022 17:57	APPROVED	14-10-2022 17:57
INPRT1 2022 0784	AR Invoice - Vessel	Paradip Integration User,DEFAULT DEPARTMENT	14-10-2022 17:57	APPROVED	14-10-2022 17:57
INPRT1-2022-00023	Shipping Bill	Paradip Integration User,DEFAULT DEPARTMENT	14-10-2022 17:26	APPROVED	14-10-2022 17:43
INPRT1 2022 0783	AR Invoice - Vessel	Paradip Integration User,DEFAULT DEPARTMENT	14-10-2022 16:47	APPROVED	14-10-2022 16:47
INPRT1-2022-0125	VCN Link Details	Paradip Integration User,DEFAULT DEPARTMENT	14-10-2022 16:25	APPROVED	14-10-2022 16:26
INPRT1-2022-00034	Allotment Of Rotation No.	Paradip Integration User,DEFAULT DEPARTMENT	14-10-2022 15:38	APPROVED	14-10-2022 15:38

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User Interface Image II-Welcome to iPortman

1. BUSINESS FUNCTION NAME: PERMISSION REQUEST

1.1. DEFINITION:

Agents seek permission from port to perform certain activities like Hot Work, Life Boat Lowering, Bunker Receive, Immobilization etc. Marine department reviews and grants the permission to Agent to perform the activities. There are NO charges involved in this process

Agent requests for various Permissions from the port either through Portal providing necessary Data.

Request will be received in iPortman application to the respective department for review and approval.

1.2. NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Marine→ Requests→ Permission Request→ Click on New button

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.
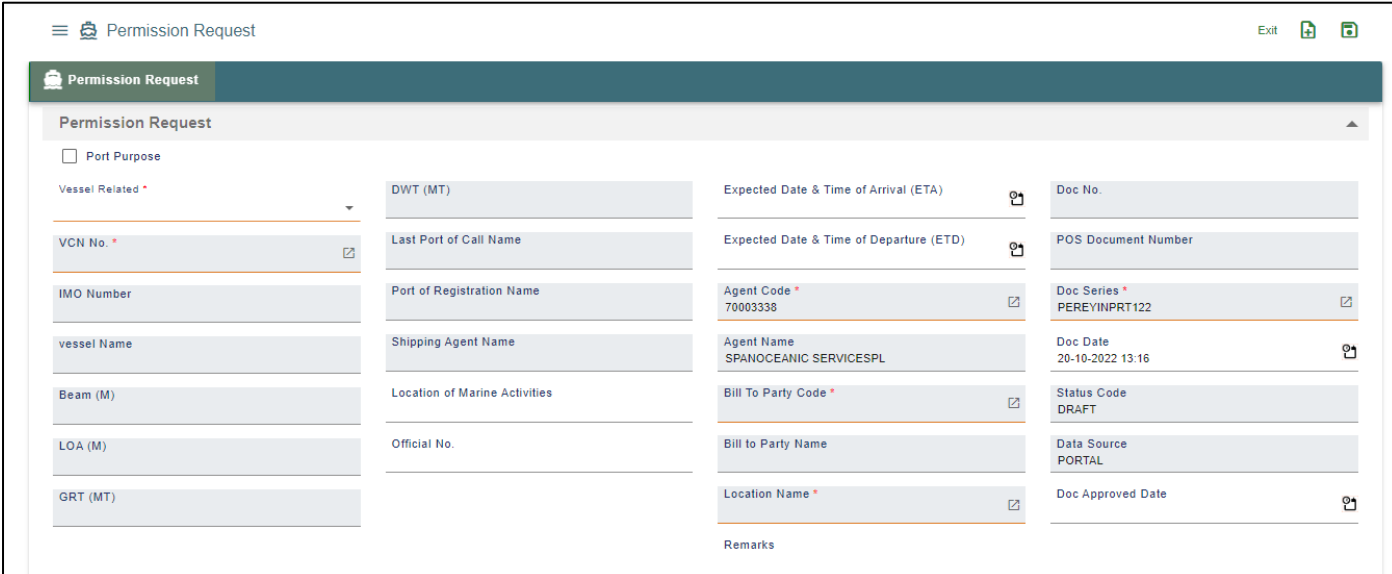
1.3. PREREQUISITES – MASTERS

1. Agent
2. Permission Type

1.4. SCREENSHOTS

Following are the screenshot from Permission Request

Step 1-Click on New button [icon] . The user shall redirect to the screen like below-.

User Interface Image 251-Permission Request 28.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.
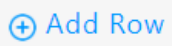
Below are the Field Information regarding Permission Request Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Port Purpose	NO	Check Box
Vessel Related	YES	Drop Down
VCN NO.	YES	Form Lookup
IMO NO.	NO	Auto Populated
Vessel Name	NO	Auto Populated
Call Sign	NO	Auto Populated
Beam(m)	NO	Auto Populated
LOA(m)	NO	Auto Populated
GRT (MT)	NO	Auto Populated
NRT(MT)	NO	Auto Populated
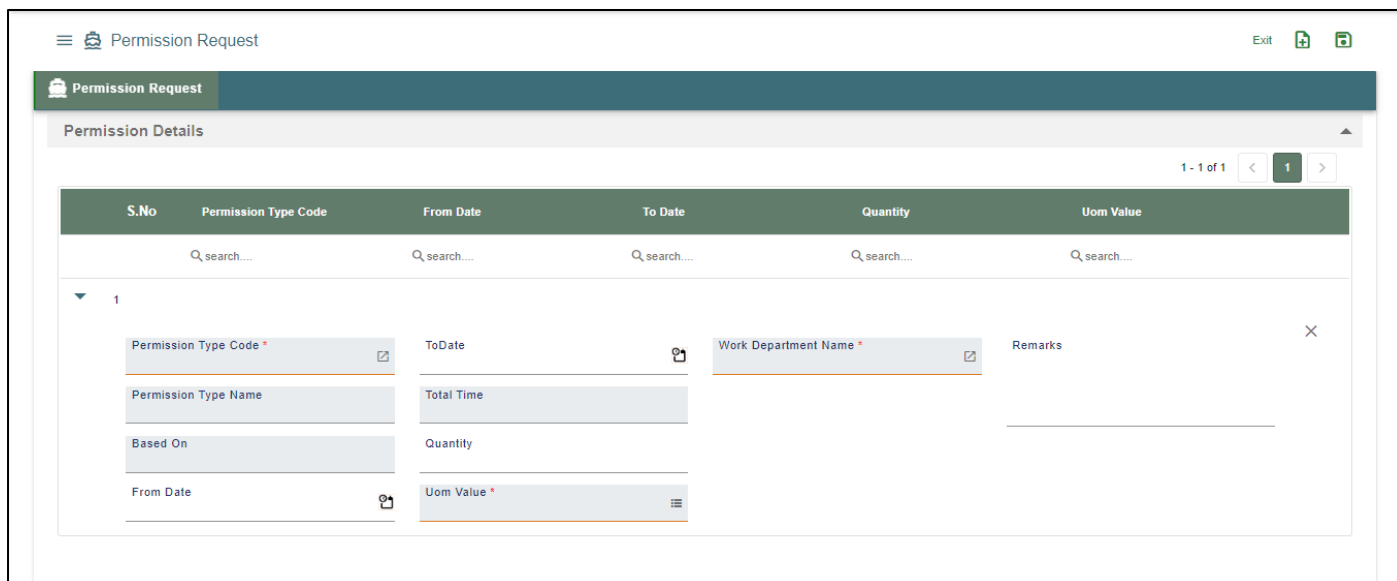
DWT(MT)	NO	Auto Populated
Run Name	NO	Auto Populated
Last Port of Call Name	NO	Auto Populated
Port of Registration Name	NO	Auto Populated
Shipping Agent Name	NO	Auto Populated
Location of Marine Activities	NO	Text Box
Official NO.	NO	Text Box
Expected Date & Time of Arrival(ETA)	NO	Calendar - Date and time / Auto Populated
Expected Date & Time of Departure(ETD)	NO	Calendar - Date and time / Auto Populated
Agent Code	YES	Form Lookup
Agent Name	NO	Auto Populated
Bill To Party Code	YES	Form Lookup
Bill To Party Name	No	Auto Populated
Location Name	YES	Form Lookup
Remarks	NO	Text Box

Step 3: Permission Details Section is also displayed in the same page. Click on ⊕ Add Row the button.

Step 4: The system shall display below fields to enter.
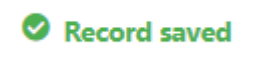
User Interface Image 252 Permission Request 28.5.2

Below are the Field Information regarding Permission Request Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Permission Type Code	YES	Form Look Up
Permission Type Name	NO	Auto Populated
Based On	NO	Auto Populated
From Date	YES	Calendar - Date and time
To Date	YES	Calendar - Date and time
Total Time	NO	Auto Populated
Quantity	YES	Text Box
Uom Value	YES	BL Lookup
Work Department Name	YES	Form Lookup
Remarks		Text Box
Attachment Name	YES	BL Lookup
Certificate Valid From	NO	Calendar
Certificate Valid To	NO	Calendar
File Name	NO	Textbox

Step 5: Click on the Save button 🖫 from the top right corner to save the Form. Once the record got saved successfully, then the system will display ✅ Record saved message.

Step 6: Aftersaving the record click on the 📎 icon. Then the user will be redirected to the Attachments Window. –

User Interface Image 253-Permission Request 28.5.3

Step 7: Click on attachment icon if any attachment are configured it will auto populate or Click on + Add files fill the required fields and upload the documents if any through Upload ⬆ button and can download the attached document by clicking on the file name attached.

User Interface Image 254-Permission Request 28.5.4

Step 8: Click on attachment icon if any attachment are configured it will auto populate or Click on **+ Add files** fill the required fields and upload the documents if any through **Upload** button and can download the attached document by clicking on the file name attached.

Step 9: Configure Check List in Check List Form for respective forms. Then Click on icon. Configured parameters will display in the Check List Window.

Step 11: Click on Save, System will display the ✅ checklist saved X status on the screen.

Step 12: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option   X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step13: Once the workflow is initiated click on the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval   ×

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to WFAPP

Step14: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. ⓘ **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen Successfully rejected. and the document status will be changed as 'REJECTED'.

Step15: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step16: Once the user Approve the request the Successfully Status changed to APPROVED following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. ❶ **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen Successfully rejected. and the document status will be changed as 'REJECTED'.

Step 17: Once the workflow is in WFAPP. Click on the icon. System will be displaying Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step 18: Once the user Approve the request the Successfully Status changed to APPROVED following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. ❶ **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen Successfully rejected. and the document status will be changed as 'REJECTED'.

Step 19: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

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Alert Message ✕

ⓘ Do you want to cancel?

NO   YES

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

Cancellation ✕

Reason Description *

Remarks

Requested By

EXIT   PROCEED

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display [Ok] and status will change to CANCEL

Step 20: Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

≡ 🖹 Permission Request

Doc No.	Status	Vessel Related	Permission Name	Employee Name	VCN No.	Vessel Name	Shipping Agent Name	Agent Code
search...	search...	search...	search...	search...	search...	search...	search...	search...

1 - 10 of 282 10 < 1 2 3 .... 27 28 29 >

User Interface Image 255Permission Request 28.5.5

Step 21: Click on 🔍 icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

Search ✕

Field	Condition	Value1	Value2	Concatenate Condition
▾	▾	search....	search....	and ▾

⊕ Add Row

Clear ⊗   Search 🔍

By Clicking on ▽ can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

2. BUSINESS FUNCTION NAME: PERMISSION RECORDING

2.1. DEFINITION:

Agents seek permission from port to perform certain activities like Hot Work, Life Boat Lowering, Bunker Receive, Immobilization etc. Marine department reviews and grants the permission to Agent to perform the activities. There are NO charges involved in this process

Agent requests for various Permissions from the port either through Portal providing necessary Data. Request will be received in iPortman application to the respective department for review and approval.

2.2. NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⠿ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Marine→ Recordings→ Permission Recording→Click on New button 🗋

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

2.3. PREREQUISITES – MASTERS

1. Department Master

2.4. SCREENSHOT

Following are the screenshots from Permission Recording

Step 1-Click on New button 🗋 . The user shall redirect to the screen like below-.

User Interface Image 256- Permission Recording 29.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Step 3: Once all the mandatory and required fields are filled then Click on the **Next** button from the bottom of the page. Then the user will be redirected to the Permission Details page as below – The data's will be auto populated based upon the previous data.
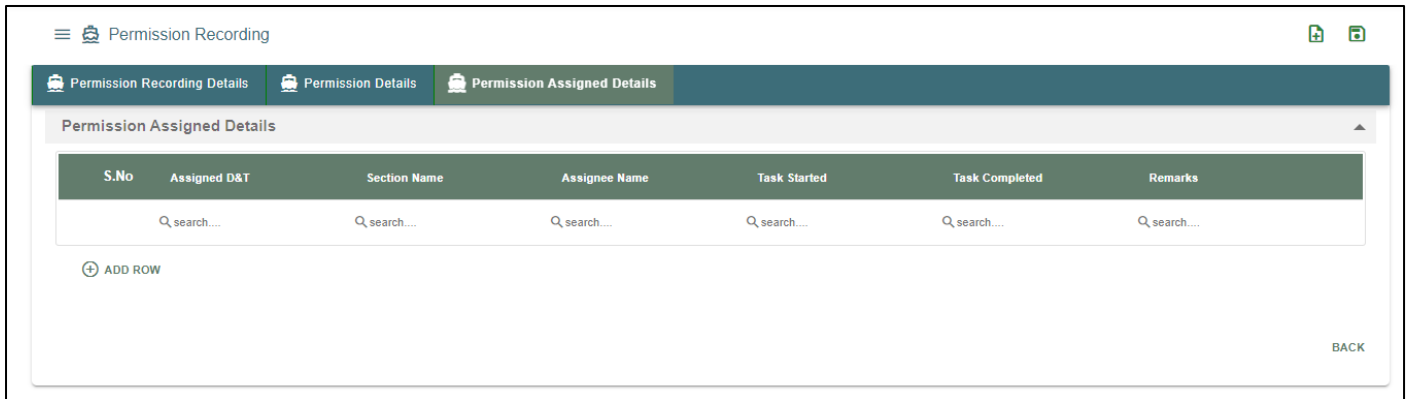
User Interface Image 257- Permission Recording 29.5.2

Step 4: Once all the mandatory and required fields are filled then Click on the **Next** button from the bottom of the page. Then the user will be redirected to the Permission Assigned Details page as below -

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User Interface Image 258- Permission Recording 29.5.3

Step 5: The system shall display below fields to enter.

User Interface Image 259- Permission Recording 29.5.4

Step 6: Click on the Save button ![save icon] from the top right corner to save the Form. Once the record got saved successfully, then the system will display ![Record saved] message.

Step 7: Aftersaving the record click on the ![attachment icon] icon. Then the user will be redirected to the Attachments Window. –

User Interface Image 260-PERMISSION RECORDING29.5.5

Step 8: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through **Upload** button and can download the attached document by clicking on the file name attached.

User Interface Image 261-PERMISSION RECORDING29.5.6

Step 9: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through **Upload** button and can download the attached document by clicking on the file name attached.

Step 10: Configure Check List in Check List Form for respective forms. Then Click on icon. Configured parameters will display in the Check List Window.
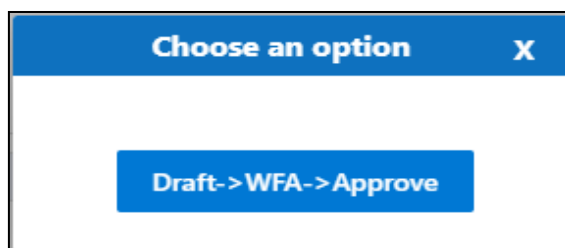
Check List				🖫 **X**
Parameter Code	**Parameter Name**	**Yes/No**	**REMARKS**	
FRESH WATER	Fresh Water	☐		

Step 11: Click on Save, System will display the ✅ **checklist saved** X status on the screen.

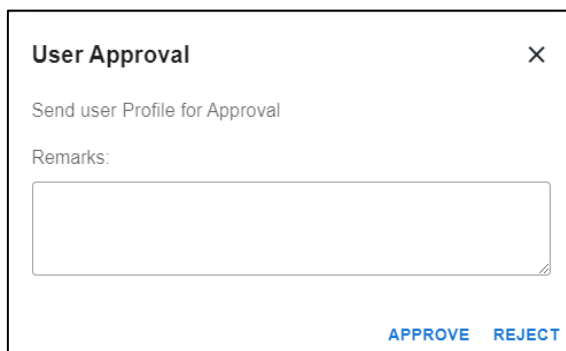**Step 12:** Once the record is saved then the document status will be as 'Draft' and then click on workflow button ⬥ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step13: Once the workflow is initiated click on ⬥ the icon. System will be display **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to WFAPP

Step14: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. ❶ **Remarks required!** .Up On

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Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step15: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

> **User Approval**   ✕
>
> Send user Profile for Approval
>
> Remarks:
>
> [   ]
>
> APPROVE   REJECT

Step16: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 17: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

> **User Approval**   ✕
>
> Send user Profile for Approval
>
> Remarks:
>
> [   ]
>
> APPROVE   REJECT

Step 18: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 19: While if there is any changes or error we can cancel the record by clicking the ▣ icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

Alert Message ✕

ⓘ Do you want to cancel?

NO   YES

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

Cancellation ✕

Reason Description *   ↗

Remarks

Requested By

EXIT   PROCEED

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display **Ok** and

status will change to CANCEL

Step 20: Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

≡ 🏛 Permission Recording								⊕ ▣
▣ ⟳						1 - 10 of 182 10 ⌄ ‹ 1 2 3 ... 17 18 19 ›		
Doc No.	**Status**	**Permission Approval No.**	**Permission Name**	**Employee Name**	**VCN No.**	**Vessel Related**	**Vessel Name**	**Agent Name**
🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...

User Interface Image 261- Permission Recording 29.5.7

Step 21: Click on 🔍 icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

Search

Field	Condition	Value1	Value2	Concatenate Condition
∨	∨	search....	search....	and ∨

⊕ Add Row

Clear ✖   Search 🔍

By Clicking on 🔽 can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

3. BUSINESS FUNCTION NAME: PERMISSION APPROVAL

3.1. DEFINITION:

Agents seek permission from port to perform certain activities like Hot Work, Life Boat Lowering, Bunker Receive, Immobilization etc. Marine department reviews and grants the permission to Agent to perform the activities. There are NO charges involved in this process

Agent requests for various Permissions from the port either through Portal providing necessary Data.

Request will be received in iPortman application to the respective department for review and approval.

3.2. NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Marine→ Approvals→ Permission Approval→ Click on New button 📄

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

3.3. PREREQUISITES – MASTERS
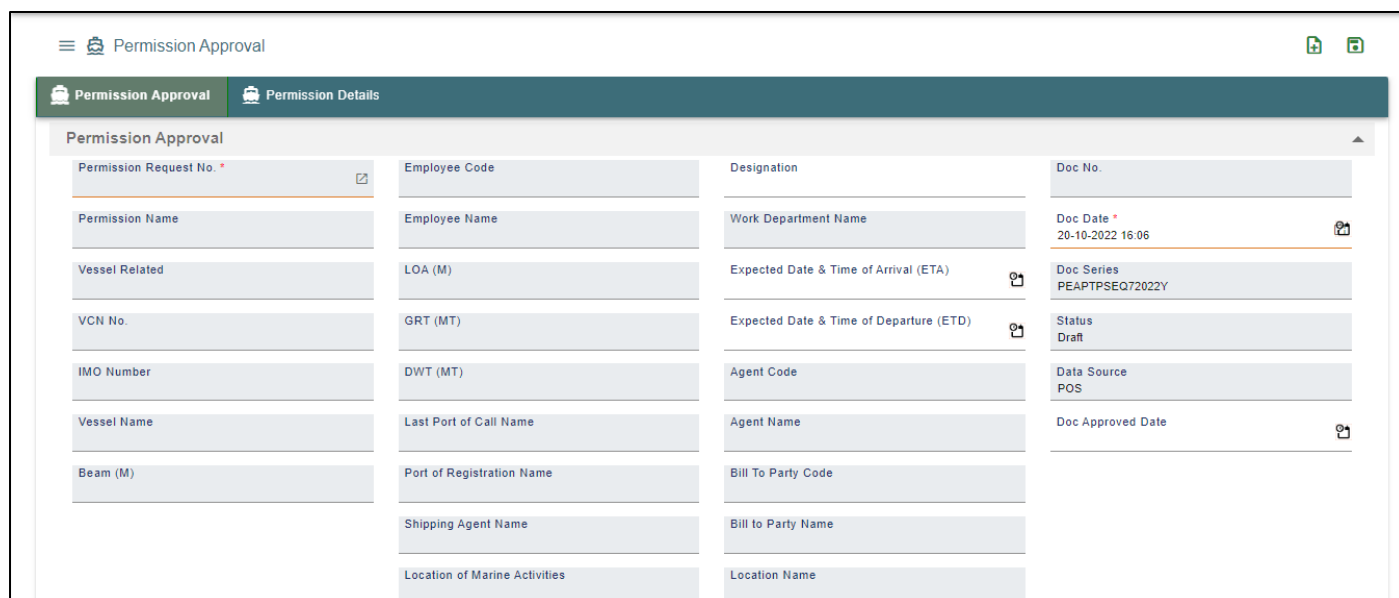
1. Agent Master
2. Permission Type Master

3.4. SCREENSHOTS

Following are the screenshot from Permission Request

Step 1-Click on New button 📄 . The user shall redirect to the screen like below-.

User Interface Image 262-Permission Approval 30.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Step 3: then Click on the **Next** button from the bottom of the page Permission Details Section is displayed which is auto populated.

User Interface Image 263-Permission Approval 30.5.2

Step 4: Click on the Save button from the top right corner to save the Form. Once the record got saved successfully, then the system will display **Record saved** message.

Step 5: After saving the record click on the ⬆ icon. Then the user will be redirected to the Attachments Window. –

Attachments (0) ✕

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

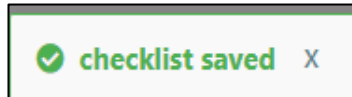Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 264-Permission Approval 30.5.3

Step 6: Click on attachment icon if any attachment are configured it will auto populate or Click on **+ Add files** fill the required fields and upload the documents if any through **Upload ⬆** button and can download the attached document by clicking on the file name attached.

Attachments (0) ✕

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 265-Permission Approval 30.5.4

Step 7: Click on attachment icon if any attachment are configured it will auto populate or Click on **+ Add files** fill the required fields and upload the documents if any through **Upload ⬆** button and can download the attached document by clicking on the file name attached.

Step 8: Configure Check List in Check List Form for respective forms. Then Click on ☰ icon. Configured

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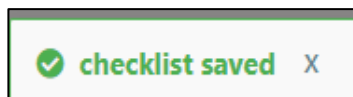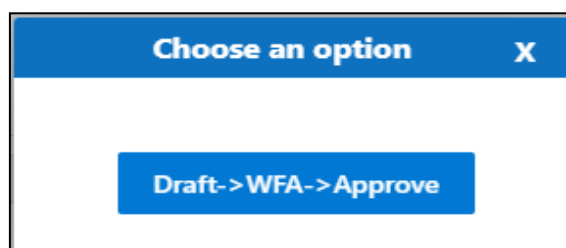
parameters will display in the Check List Window.

Check List				
Parameter Code	**Parameter Name**	**Yes/No**	**REMARKS**	
FRESH WATER	Fresh Water	☐		

Step 9: Click on Save, System will display the ✓ checklist saved X status on the screen.

Step 10: Once the record is saved then the document status will be as 'Draft' and then click on workflow

button   .

Choose an option   X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step11: Once the workflow is initiated click on   the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval   ×

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to WFAPP

Step12: Once the user Approve the request the following   status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. **❶ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step13: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step14: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **❶ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 15: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step 16: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 17: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

Alert Message ✕

ⓘ Do you want to cancel?

NO   YES

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

Cancellation ✕

Reason Description *

Remarks

Requested By

EXIT   PROCEED

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display **Ok** and status will change to CANCEL

Step 18: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

☰ 🏛 Permission Approval   ⊕ ◱

Doc No.	Status	Permission Request No.	Permission Name	Employee Name	VCN No.	Vessel Related	Vessel Name	Agent Name
🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...

User Interface Image266- Permission Approval 30.5.5

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Step 19: Click on [icon] icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

By Clicking on [icon] can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

4. Business Function Name: Back to Town

4.1. Definition:

Cargo brought to the port for export purpose, sometimes could not be loaded to the vessel due to various reasons. That cargo can be moved back to exporter's rental plots /exporters place with a request to the port and seeking permission with Customs. Exporter can request for back to town through iPortman® Portal. Request is updated in iPortman® for review and approval.

4.2. Navigation

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU [icon] SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo → Cargo Operation→ Back to Town→ Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA [icon] AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

4.3. Prerequisites – Masters
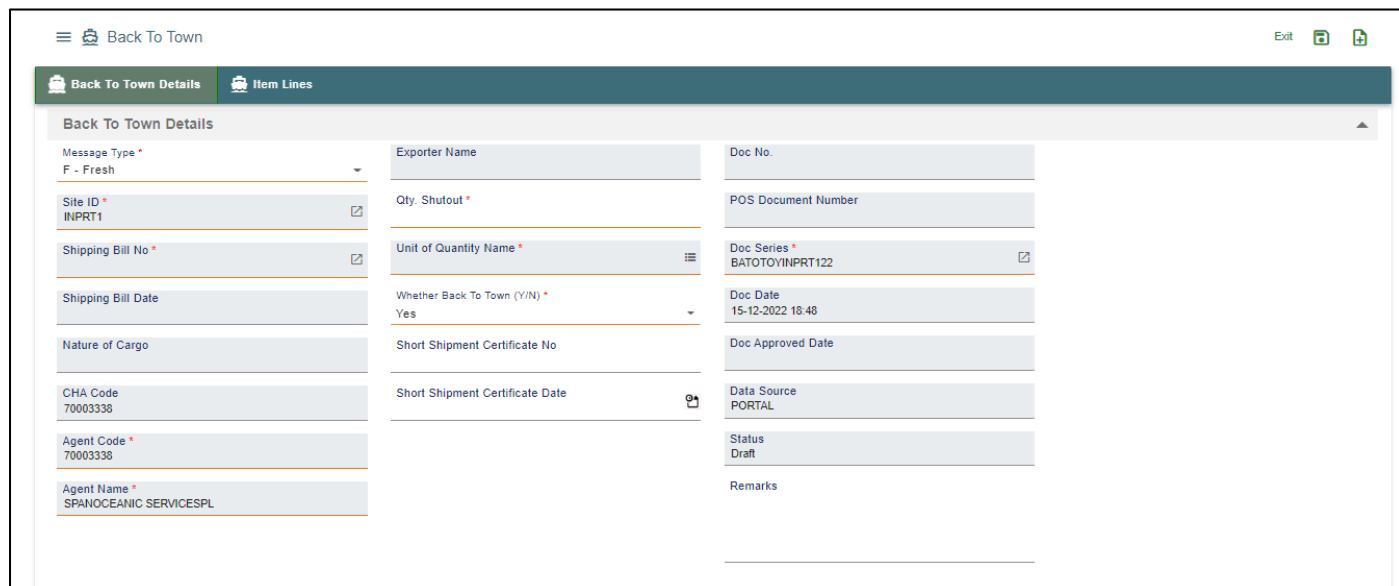
Following Masters are required in order to complete the Import Application and send for approval.

1. Document Type
2. Port of Discharge
3. Reason for BTT
4. Exporter Code
5. Exporter name
6. Cargo Code
7. Cargo Name
8. UOM

4.4   SCREENSHOT

Following screenshot from Back to Town

Step 1- Click on Add new button ⊞ .We will redirect to screen like below.

User Interface Image 176 -Back to Town Details-28.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Back to Town Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)
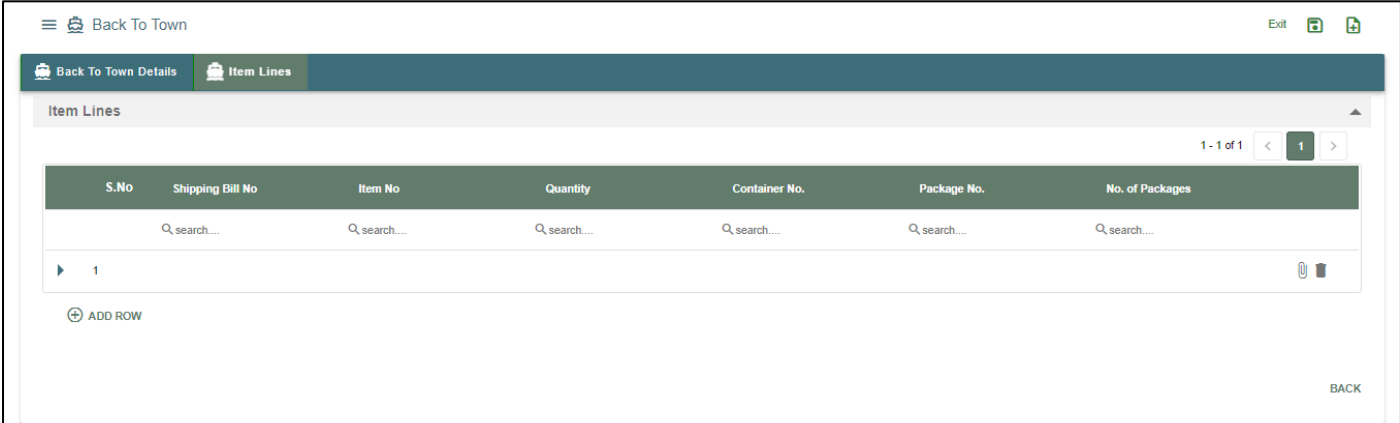
Field Name	Mandatory	Fill Type
Message Type	Yes	Dropdown
Site ID	Yes	LOV
SB No.	Yes	LOV
SB Date	No	Calendar
Nature of Cargo	No	Text Box
CHA Code	No	Auto fill
Exporter Code	No	Auto fill
Quantity Shutout	Yes	Text Box
Unit of Quantity	Yes	LOV
Whether Cargo Back to Town(Yes/No)	Yes	Dropdown
Short Shipment Certificate No	No	Text Box
Short Shipment Certificate Date	No	Calendar
BTT Numb		Text Box
BTT Series		List
BTT Date		Calendar
BTT Status		Text Box
Approval Date		Calendar
Remarks		Text Box

Step 3: Click [ ] button from Top Menu Bar to save Back to Town Details form record. Once it is saved Item Lines Details will be activated to add Item Line details.
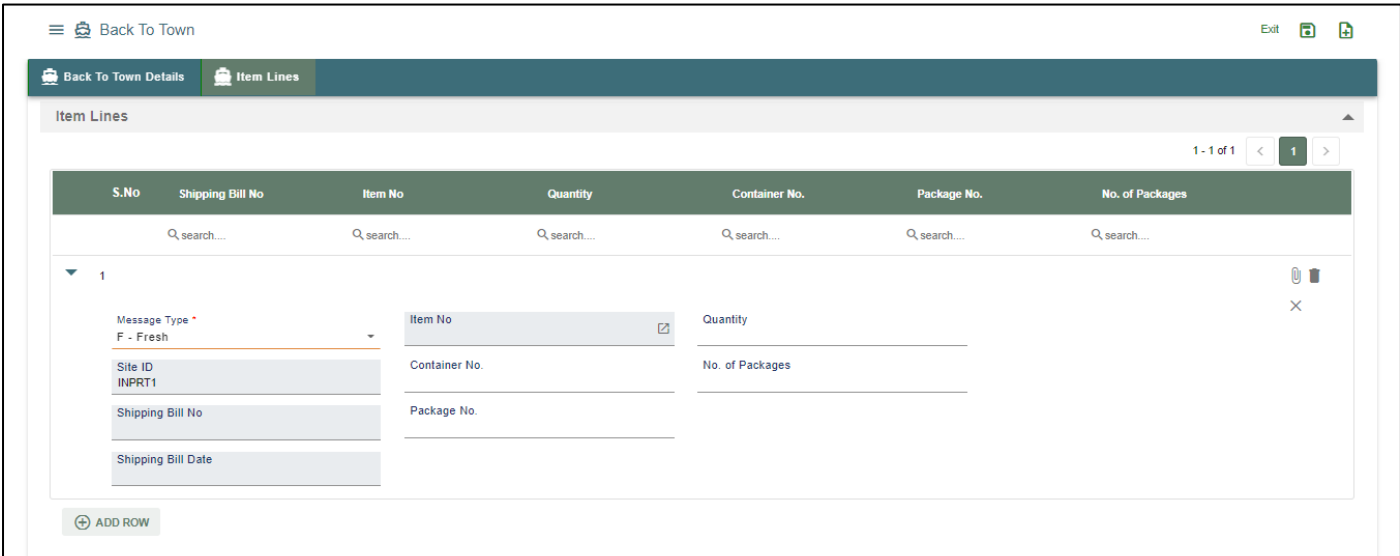
Record saved

Step 4: Once Back to Town Details form are saved, Item Line Details will be activated as below to add Item Line Details as shown in below screen.
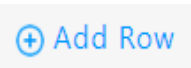
User Interface Image 177-Item Lines-28.5.2

Click on [Add Row] to begin with data entry

User Interface Image 178-Item Lines-28.5.3

Step 5: Once data is filled in Item Lines, click on save button [ ] and click on [Add Row] if need to add multiple Row's or else click on [ ] button.

Below are the Field Information regarding item Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Message Type	Yes	Dropdown
Site ID	No	Text Box
Shipping Bill No	No	Text Box
Shipping Bill Date	No	Text Box
Shipping bill item no	No	Pop Up
Container No.	No	Text Box
Package No.	No	Text Box
Quantity	No	Text Box

Adding the files manually once the record got saved, Click on the [📎] icon. Then the user will be redirected to the popup window as below –

Click on [+ Add files] button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [📎] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on ![icon] icon.

Respective Form Name, Section name will display to attach the documents*File Required.

Now Click on the Check boxes accordingly, then Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on button. System will display the status on the screen.

Click On Close Button

Click on the Save button [icon] from the top right corner to save the Back to Town Form. Once the record got saved successfully,

then the system will display **Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option   X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval   X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ×

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[Approve] [Reject]

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon system will display **Confirmation required** with below alert ok and Back

Alert Message ×

ⓘ Do you want to cancel?

NO   YES

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

Cancellation ×

Reason Description ⧉

Remarks

Requested By

[Exit] [Proceed]

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to

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CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 181-List table -28.5.6

5. Business Function Name: Internal Shifting Request

5.1. Definition:

Internal Shifting is the process of shifting the cargo from one location to another location on basis of Agent request or shifting the cargo for Port conveniences. Agent fills the and submits request for internal shifting in iPortman® Portal and same will be received by the port authorities in iPortman® application

5.2. Navigation

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⠿ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo → Request → Internal Shifting Request → Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

5.3. Prerequisites – Masters
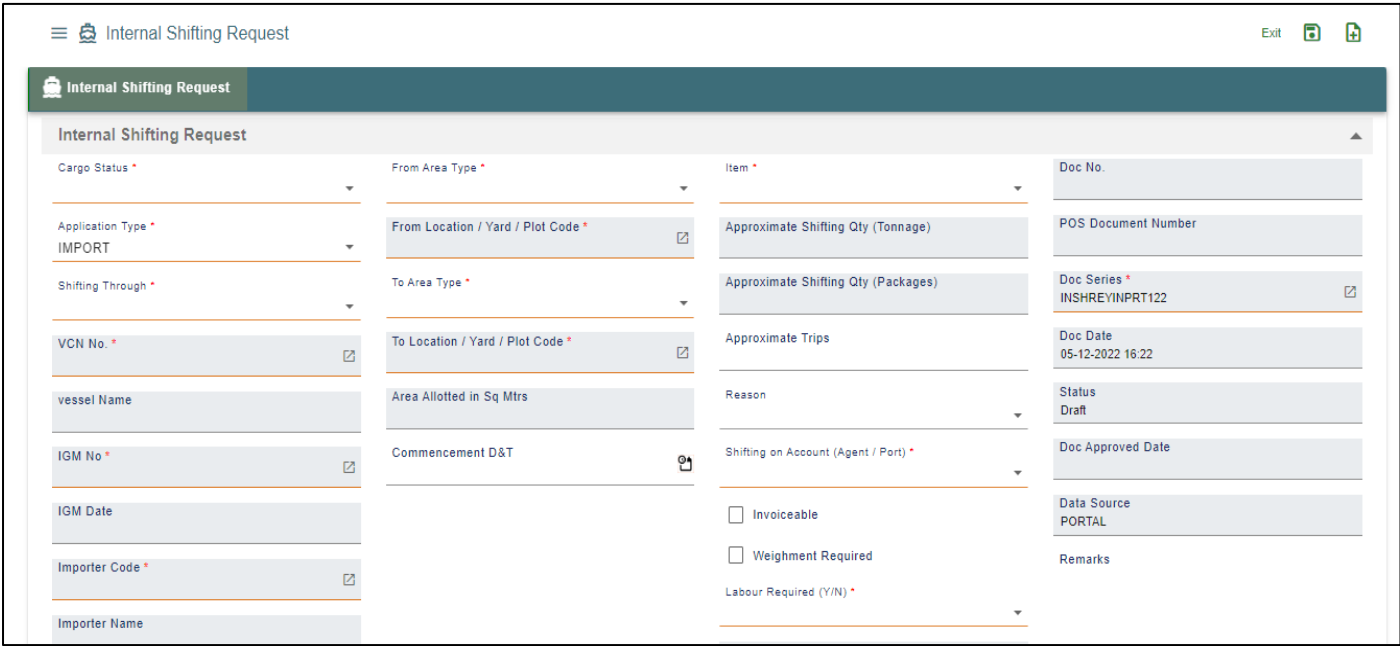
1.   Shifting Type
2.   Shifting Through
3.   VCN NO
4.   IGM No
5.   From Location/Yard/Plot Code
6.   To Location/Yard/Plot Code
7.   Importer Code

5.4. Screenshot

Step 1: After Navigation to the respective function screen, User will move to list of Data and Click on Add new button 🔁 . it will direct to the below screen in order to fill the data

if Selected Item=Cargo, then Cargo details Tab is enable

User Interface Image 40 - Internal Shifting Request Header Details 8.1
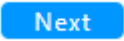
Below are the Field Information regarding Internal Shifting Request Details Section.
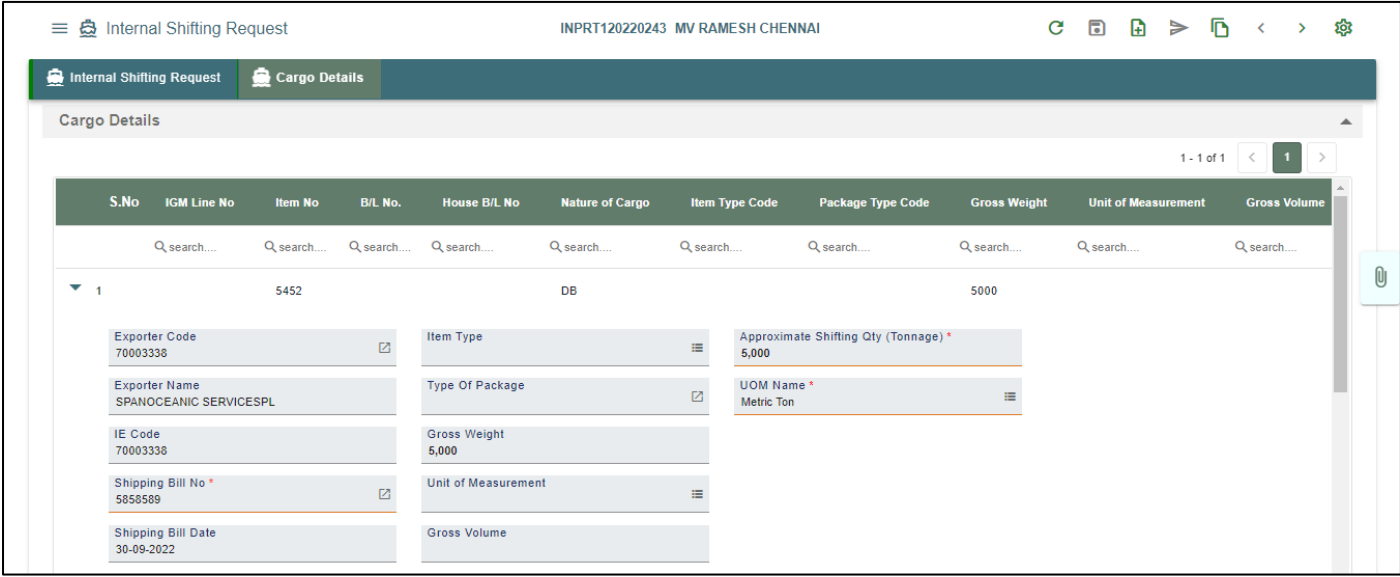
(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Cargo Status	Yes	Dropdown
Shifting Type	Yes	Dropdown
Application Type	Yes	Dropdown
Shifting Through	Yes	Dropdown
VCN No	Yes	LOV
Vessel Name	No	Textbox
IGM No.*	Yes	LOV
IGM Date	No	Textbox
Rake Application No	No	Textbox
Importer Code*	Yes	LOV
Importer Name	No	Textbox
From Area Type	Yes	Dropdown
From Location/Yard/Plot Code*	Yes	LOV
To Area Type	Yes	Dropdown
To Location/Yard/Plot Code*	Yes	LOV

Storage Allotment No	No	LOV
Area Allotted In Sq Mtrs	No	Textbox
Commencement D&T	No	Calendar
Approx. Shifting Quantity(Tonnage)*	No	Textbox
Approx. Shifting Quantity(Packages)*	No	Textbox
Approximate Trips	Yes	Textbox
Reason	No	Dropdown
Shifting On Account	Yes	Dropdown
Invoiceable	No	Checkbox
Requesting Party Name	Yes	LOV
Labour Required (Y/N)	Yes	Dropdown
Shifting Operation By (Port/Private)	Yes	Dropdown
Balance Qty On (From Plot/Yard Code)	No	Textbox
Balance No. Of Packages On(From Plot/Yard)	No	Textbox

Step 2: Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on

save button 🖫 and proceed to click on **Next** button for Internal Shifting Request Cargo Details. And

Press ⊕ Add Row to enter the data.
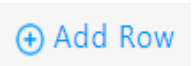
User Interface Image 41 - Internal Shifting Request Cargo Details 8.2

Below are the Field Information regarding Cargo Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
IGM Line No	Yes	LOV
Sub Line No	No	Textbox

Import Application No	No	Textbox
IE Code	No	Textbox
Commercial Invoice No	No	LOV
Bill Of Entry No	No	LOV
Nature of Cargo	No	Textbox
Cargo Code	No	LOV
Cargo Name	No	Textbox
SMTP No/TSA No	No	Textbox
No of Packages	No	Textbox
Item Type	No	LOV
Type of Package	No	Textbox
Gross Weight	No	Textbox
Unit Of Measurement	No	LOV
Gross Volume	No	Textbox
Unit of Volume Code	No	LOV
Marks & Number	No	Textbox
Approximate Shifting Qty(Tonnage)	Yes	Textbox
UOM Name	Yes	LOV
IGM Line No	No	Textbox
Sub Line No	No	Textbox
Shipping Bill No	No	Textbox
Shed Location Name	No	Textbox
Cargo Name	No	Textbox
No of Packages	No	Textbox
Gross Weight	No	Textbox
Unit Of Measurement	No	Textbox

Step 4: Once data is filled in Cargo Details, click on save button and click on ⊕ Add Row if need to add multiple Row's or else click on button, And document will be saved with 'Draft' status with on screen LOV as below

✓ Record saved

Step 5(a): Adding the files manually once the record got saved, Click on the 📎 icon. Then the user will be redirected to the popup window as below –

Click on **➕ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [📎] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [📎] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload 🠅] button. System will display the status [File uploaded] on the screen.

Click On Close Button

Click on the Save button ⊟ from the top right corner to save Form. Once the record got saved successfully, then the system will display [✔ Record saved] message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◈ .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on ◇ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step9: Once the user Approve the request the following **Successfully Status changed to WFAPP** status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on ◇ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon system will display **Confirmation required** with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to

CANCEL

By Clicking on ◐ / ⟳ / ✓ we can view the status of the record.

Step 15: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

Step 16: Click on ⓠ s icon to new popup window will display. And can Clear / Search the records with multiple inputs.

By Clicking on 🗑 can clear the inputs in the columns. By Clicking on No of Records per page [10 ▾] Drop down can select 10/20/30/40 records to view in List page.

By Clicking on ↻ Load the records and display the data.

6. Business Function Name: Yard Delivery

6.1. Definition:

Yard Delivery is the process to recording the shifting or Delivery of cargo from one location to another location. This will be recorded by shed super ident or person in-charge at port for such activity against the approval of Internal Shifting Request raised by the CHA/Importer/Vessel Agent.

6.2. Navigation

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⠿ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo → Yard Operations → Yard Delivery→ Click on **Add New**
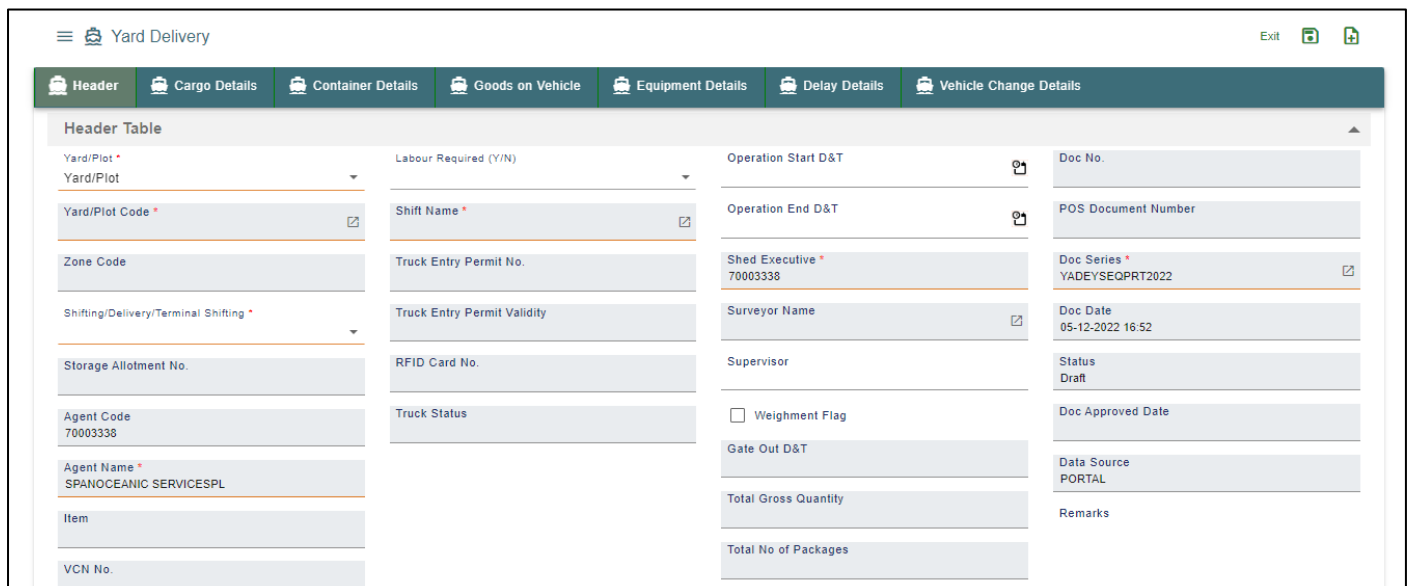
USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

6.3. Prerequisites – Masters

1. Yard/Plot Code
2. Shifting/Delivery
3. Shift
4. Agent Master

6.4. Screenshot
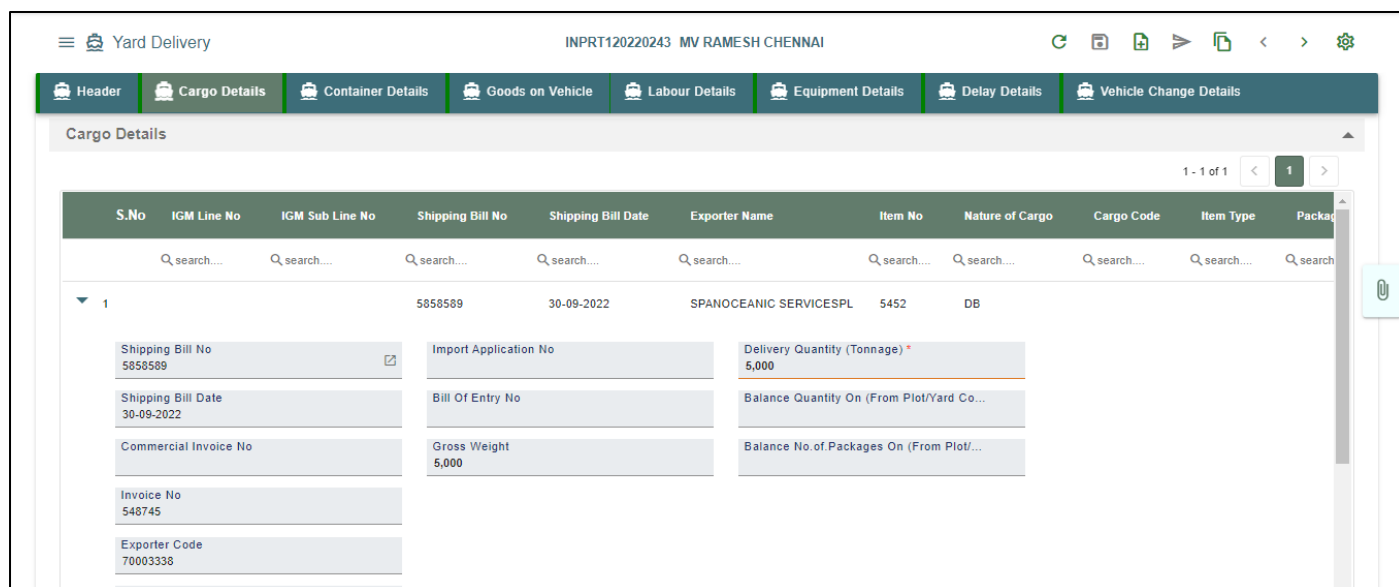
Step 1: After Navigation to the respective function screen, user will move to list data then Click on Add new button 🗋 . It will direct to the below screen in order to fill the data

User Interface Image 44–Yard Delivery Header Details 9.1

Step 2: Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on save button 🗗 and proceed to click on **Next** button for Cargo Details Screen shown below.

User Interface Image 45–Yard Delivery Cargo Details 9.2

Step 3: Based on selection of Header Details Cargo Details will be auto populated click on ⟦Next⟧ button to go for below screen of Labour Details as shown below.

User Interface Image 46–Yard Delivery Good on Vehicle 9.3
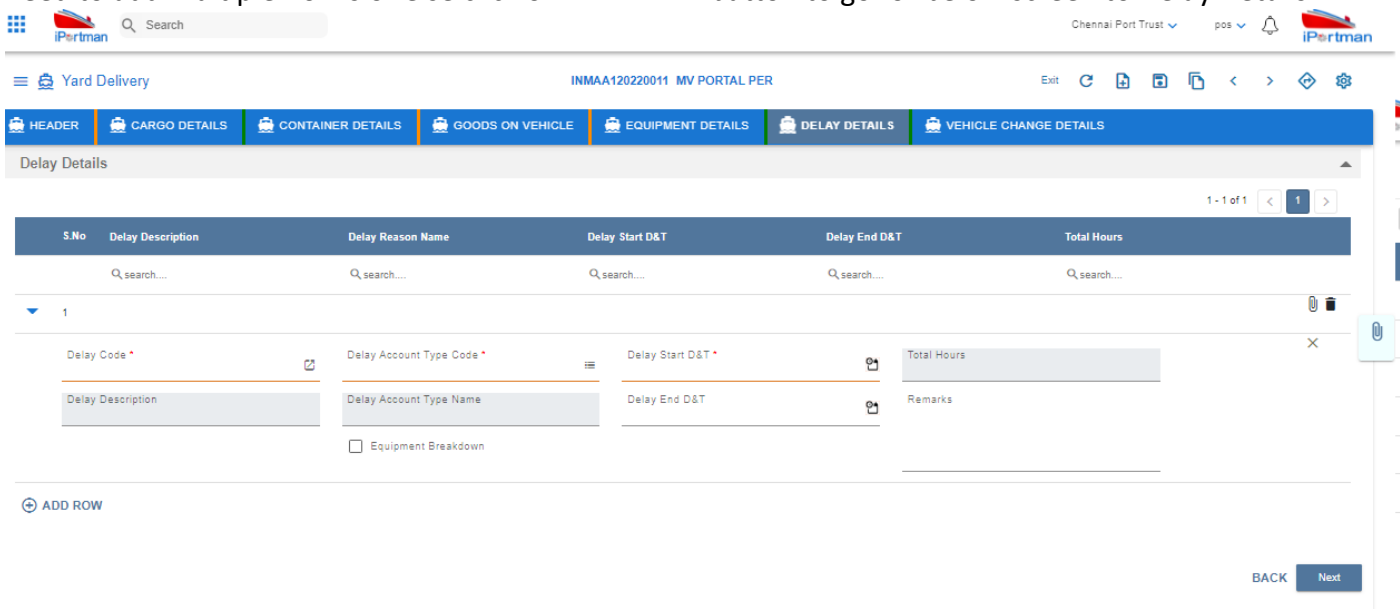
Step 4: Once data is filled in Labour Details, click on save button ⟦ ⟧ and click on ⟦ Add Row ⟧ if need to add multiple Row's or else click on ⟦Next⟧ button to go for below screen to record Equipment Details.

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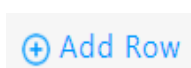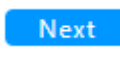
User Interface Image 47–Yard Delivery Equipment Details 9.4
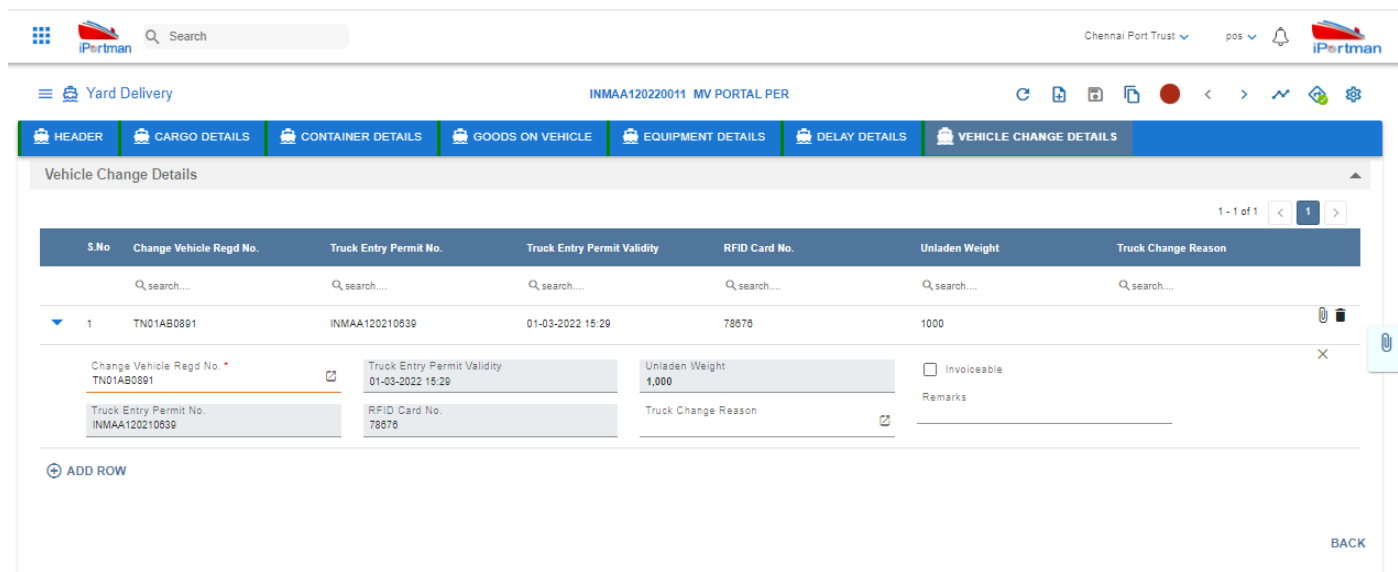
Step 5: Once data is filled in Equipment Details, click on save button [icon] and click on [Add Row] if need to add multiple Row's or else click on [Next] button to go for below screen to Delay Details.

User Interface Image 48–Yard Delivery Delay Details 9.5

Step 6: Once data is filled in Delay Details, click on save button [icon] and click on [Add Row] if need to add multiple Row's or else click on [Next] button to go for below screen to Vehicle Change Details.

User Interface Image 49–Yard Delivery Vehicle Change Details 9.6

Step 7:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields. And Click on [icon] button. And On-screen notification will be LOV as [Record saved]

Step 8(a): Adding the files manually once the record got saved, Click on the [icon] icon. Then the user will be redirected to the popup window as below –

Click on [+ Add files] button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

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NOTE: If the attachments added in line level by using [paperclip] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [paperclip] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display the status [File uploaded] on the screen.

Click On Close Button

Click on the Save button ![save icon] from the top right corner to save Form. Once the record got saved successfully, then the system will display ![Record saved] message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ![workflow icon] .

Choose an option   X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on ![workflow icon] the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval   X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on ![workflow icon] the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

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Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the icon shown. After clicking the icon system will display with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display and status will change to

CANCEL

By Clicking on ⬤ We can view the Success Status of the record

Data Submit Status   X

Portal Integration

Status: SUCCESS

End Point Code	Status	Response
IPAPRJCTYADETPPRTLCHPTOB	SUCCESS	record saved successfully id = 3225

Pos Integration

Status: SUCCESS

End Point Code	Status	Response
IPAPRJCTYARDELSAP	SUCCESS	{ "status":"message received" }

Step 18: While if there is any changes we can amend the record by clicking the 🔄 icon shown. After

clicking the icon system will display **Confirmation required** with below alert message.

Alert Message   ✕

ⓘ Do you want to Amend?

NO   YES

By Clicking on No we can go to the previous screen. By clicking yes we can see ✅ Ok Alert and status code

changed to 'AMEND'

Step 19: Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

Step 20: Click on ![icon] icon to new popup window will display. And can Clear / Search the records with multiple inputs.

By Clicking on ![icon] can clear the inputs in the columns. By Clicking on No of Records per page ![10] Drop down can select 10/20/30/40 records to view in List page.

By Clicking on ![icon] Load the records and display the data.

.

6.5. Field information

Field Name	Mandatory	Fill Type
Yard/Plot	Yes	LOV
Yard/Plot Code	Yes	LOV
Zone Code	No	Textbox
Shifting/Delivery/Terminal Shifting	Yes	Dropdown
Internal Shifting Request No	Yes	LOV
Storage Allotment No.	No	Textbox
Shifting Type	No	Textbox
Shifting Through	No	Textbox
Shed Delivery Order	No	LOV
Shed Delivery Order Validity Period	No	Textbox

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Shed DO Qty	No	Textbox
VCN No	No	Textbox
Vessel Name	No	Textbox
Actual Time of Arrival	No	Textbox
IGM No.	No	LOV
IGM Date	No	Calendar
Rake Application No.	No	Textbox
Importer Name	No	Textbox
To Location/Yard/Plot Name	No	Textbox
Reason Name	No	Textbox
Invoiceable	No	Checkbox
Labour Required(Y/N)	No	LOV
Shift Name	Yes	LOV
Vehicle Registration No	Yes	LOV
Truck Entry Permit No	No	Textbox
Truck Entry Permit Validity	No	Textbox
RFID Card No.	No	Textbox
Truck Status	No	Textbox
CGP No.	No	Textbox
CGP Date	No	Textbox
Shed Executive	Yes	Textbox
Agent Code	No	Textbox
Agent Name	No	Textbox
Shifting Operation By Code	No	Textbox
Shifting Operation By	No	Textbox
Total No of Containers	No	Textbox
Shifting Reason	No	LOV
Vessel Completion Date	No	Textbox
Cargo Discharge Date	No	Textbox
LFD	No	Textbox
Shifted Quantity	No	Textbox
Total No of Trips	No	Textbox
Total Operation Time	No	Date Time
Container or Cargo	No	Dropdown
IGM Line No	No	Textbox
Sub Line No	No	Textbox
B/L No	No	Textbox
House B/L No	No	Textbox
Nature of Cargo	No	Textbox
Carting Bill Item No	No	Textbox
No of Packages	No	Textbox
Type of Package	No	Textbox

Gross Weight	No	Textbox
Unit of Weight	No	Textbox
Gross Volume	No	Textbox
Unit of Volume	No	Textbox
Marks & Number	No	Textbox
Goods Description	No	Textbox
Shifting Quantity	No	Textbox
No of Trips	No	Textbox
Balance Quantity	No	Textbox
Equipment Name	No	LOV
Cargo Name	No	Textbox
To Location/Yard/Plot Name	No	Textbox
Received No of Packages	No	Textbox
Balance No of Packages	No	Textbox
Approx./Net Qty	No	Textbox
No. of Equipment	No	Textbox
Driver Name	No	Textbox
Truck No	No	Textbox
Start Date & Time	Yes	Date Time
End Date & Time	Yes	Date Time
Total Time	No	Date Time
Weighbridge Name	No	LOV
Weighbridge In Time	Yes	Date Time
Weighbridge Out Time	Yes	Date Time
Tare Weight	No	Textbox
Gross Weight	No	Textbox
Net Quantity	Yes	Textbox
Remarks	No	Textbox
Delay Code	Yes	LOV
Delay Description	No	Textbox
Delay Account Type Code	Yes	LOV
Delay Start Date & Time	Yes	Date Time
Delay End Date & Time	No	Date Time
Total Delay Time	No	Date Time
Equipment Code	Yes	LOV
Description	No	Textbox
Start D&T	Yes	Date Time
End D&T	Yes	Date Time
Total Hours	No	Textbox
Remarks	No	Textbox
Employee Name	Yes	LOV
Employee Type Name	Yes	LOV

Start D&T	No	Date Time
End D&T	No	Date Time
Over Time	No	Dropdown
Over Remarks	No	Textbox
IGM Line No	No	LOV
IGM Sub Line No	No	Textbox
Container No	Yes	Textbox
Container Status	No	Textbox
Container Seal Status	No	Textbox
ISO Code	No	Textbox
Total No of Packages	No	Textbox
Container Weight	No	Textbox
SOC Flag(Yes/No)	No	Textbox
Container Agent Name	No	LOV
Location Name	No	LOV
Driver Name	No	Textbox
Truck No	No	Textbox
Total Operation Time	No	Textbox
ODC Flag	No	Textbox
Total No of Containers	No	Textbox

7. Business Function Name: Shipping Bill

7.1. Definition:

A Shipping Bill is an important document required by the customs authorities for the clearance of goods. Exporter/CHA requests for shipping bill in the Ice gate portal and that information is used to generate EGM. Upon receiving Shipping Bill in the Ice gate, PCS receives the information in EDI format and the same information is retrieved to iPortman® through PCS.

7.2. Navigation:

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo → Export Documentation → Shipping Bill→ Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

7.3. Prerequisites – Masters

1. Agent
2. Cargo
3. UOM

7.4. Screenshot

Following screenshot from Shipping Bill

Step 1- Click on Add new button [icon]. Wewill redirect to screen like below.

User Interface Image 1-Shipping Bill-1.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Shipping Bill Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)
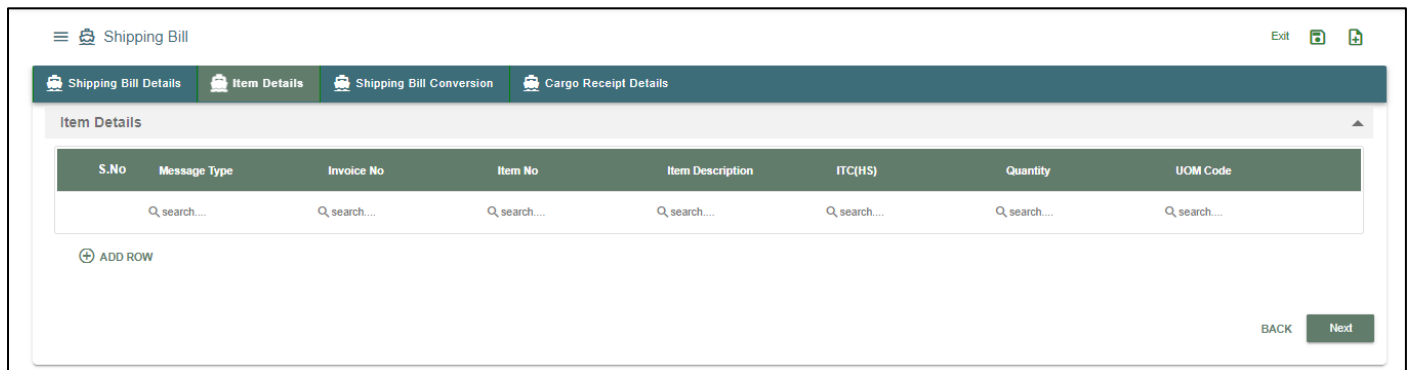
Field Name	Mandatory	Fill Type
Message Type	Yes	Dropdown
Site ID	Yes	LOV
SB NO	Yes	Text Box
SB Date	Yes	Calendar
Nature of Cargo	Yes	LOV
Gross Quantity	No	Text Box
Unit of Quantity	No	LOV
Total FOB Value (in Rs)	Yes	Text Box
Total No. of Pkgs.	No	Text Box
Port of Destination	Yes	LOV
Port of Origin(Port where SB is filed)	Yes	LOV
IE Code *	Yes	LOV
Rotation Number	No	NA
Rotation Date	No	NA
Exporter Code	Yes	Text Box
Address1	Yes	Text Box
Address2	No	Text Box
City	No	Text Box
PIN Code	No	Text Box
CHA NO	No	List
Application Type	No	Text Box

Step 3: Click ⊡ button from Top Menu Bar to save shipping bill form record. Once it is saved Item line will be activated to add item line details.

✅ Record saved
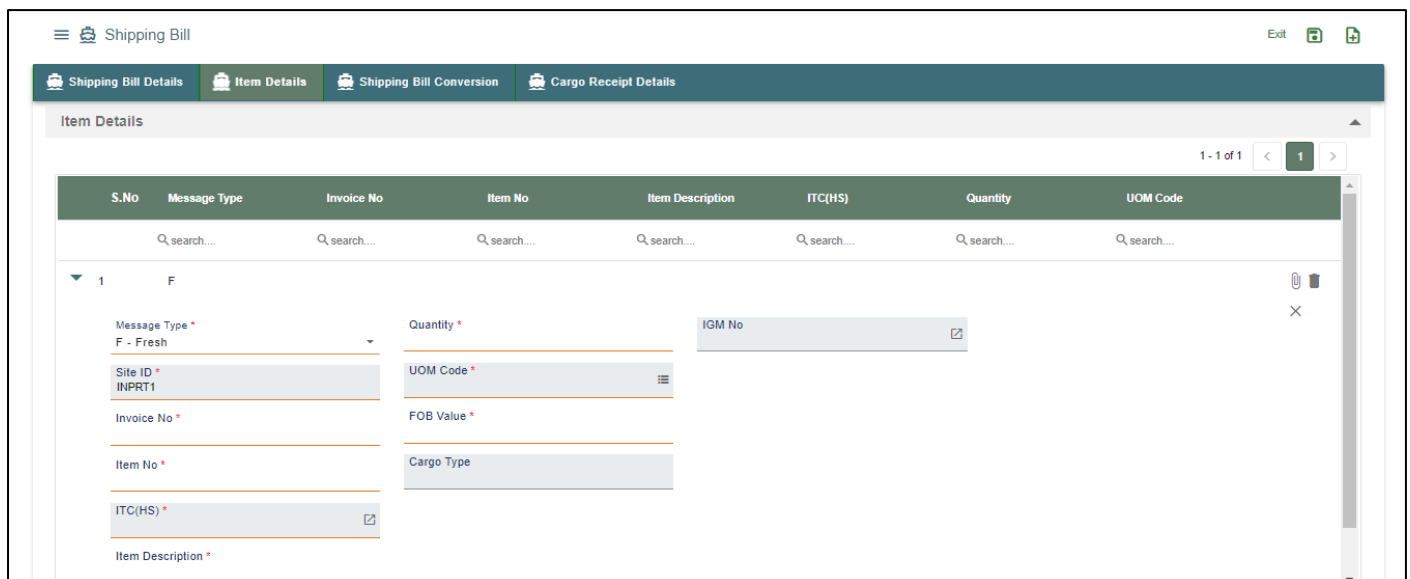
Step 4: Once Shipping Bill Details are saved, item line Details will be activated as below to add item line Details as shown in below screen.

User Interface Image 2-Shipping Bill (Item Details)-1.5.2

Click on ⊕ Add Row *to begin with data entry*

User Interface Image 3-Shipping Bill (Item Details)-1.5.3

Below are the Field Information regarding item Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Marks & Numbers	No	Text Box
Invoice Serial Number	Yes	Text Box
Item No	Yes	Text Box
ITC (HS)	Yes	Text Box
Item description	Yes	Text Box
Quantity	Yes	Text Box

Unit of Measurement	Yes	Text Box
FOB Value (in Rs.)	Yes	Text Box
No. of Packages	Yes	Text Box
Cargo Type	No	LOV
Invoice No	No	Popup
Ship Store Declaration	No	Dropdown
Returnable (Y/N)	Yes	Dropdown

Step 5: Once data is filled in Item Line Details, click on save button and click on ⊕ Add Row if need to add multiple Row's or else click on 🖫 button.
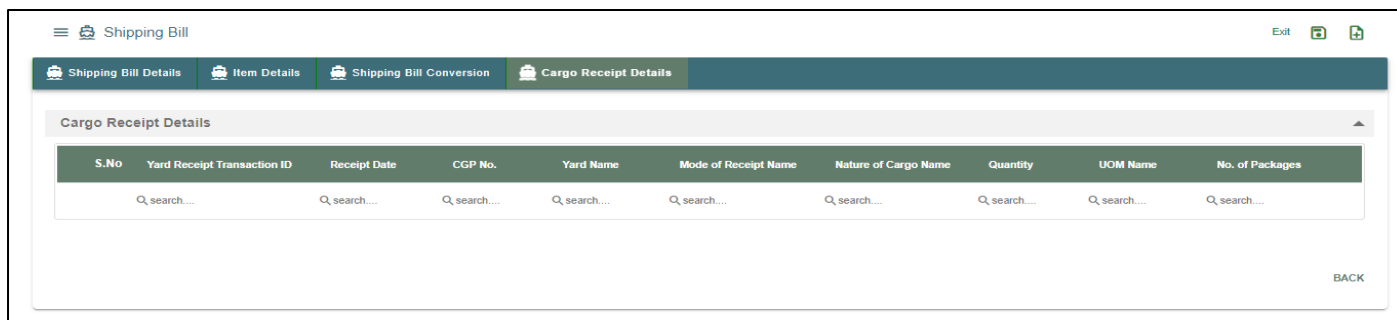
Step 6: Once item Details are saved, shipping line Conversion Details will be activated as below to add item line Details as shown in below screen.

User Interface Image 4-Shipping Bill (Item Details)-1.5.4

Once all mandatory fields are filled and saved, Cargo Receipt Details will be activated as below

User Interface Image 5-Shipping Bill (Item Details)-1.5.5

Below are the Field Information regarding Shipping Bill Conversion Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
New Shipping Bill No		
New Shipping Bill Date		
Transferred Quantity		Text Box
Transferred No. of Pkgs		Text Box
VCN No	No	Text Box
Vessel Name	No	Text Box
IMO No	No	Text Box

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Adding the files manually once the record got saved, Click on the [📎] icon. Then the user will be redirected to the popup window as below –

Click on [+ Add files] button/ Drag Files hereto upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display [**File uploaded**] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [📎] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [📎] icon.

Respective Form Name, Section name will display to attach the documents*File Required.

Attachments (2)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

Now Click on the Check boxes accordingly, then Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (2)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☑	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☑	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

Once all the mandatory and required fields are filled then Click on 📎 button. System will display the status **File uploaded** on the screen.

Click On Close Button

Click on the Save button ⊟ from the top right corner to save the Back to Town Form. Once the record got saved successfully,

then the system will display ✓ **Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◈ .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on ◈ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

 with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon

system will display with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 8-Shipping Bill List Data -1.5.8

8. Business Function Name: Commercial Invoice

8.1. Definition:

8.2. Navigation

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar →Cargo →Others → Commercial Invoice → Click on **Add New**
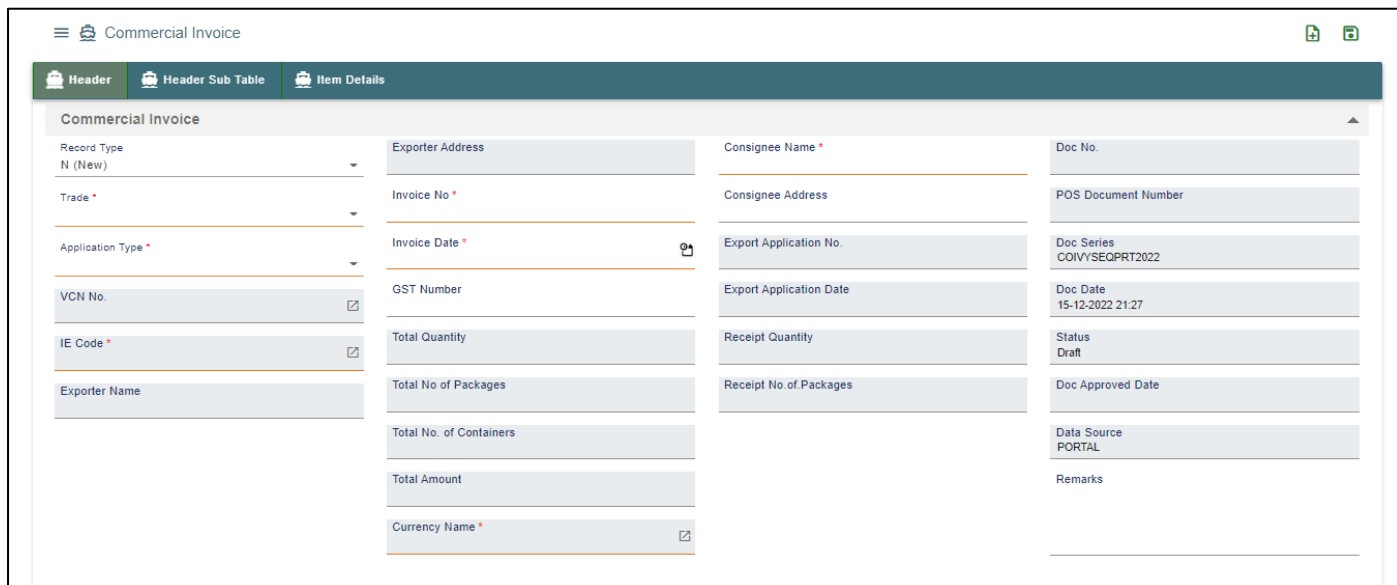
USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

8.3. Prerequisites – Masters

1. Customs House Code
2. Importer
3. CHA

8.4. Screenshot

Step 1: After Navigation to the respective function screen, User will move to list of data and Click on Add new button 🔲 . It will direct to the below screen in order to fill the data.

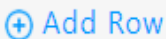*User Interface Image 57 – commercial Invoice Header Details11.1*
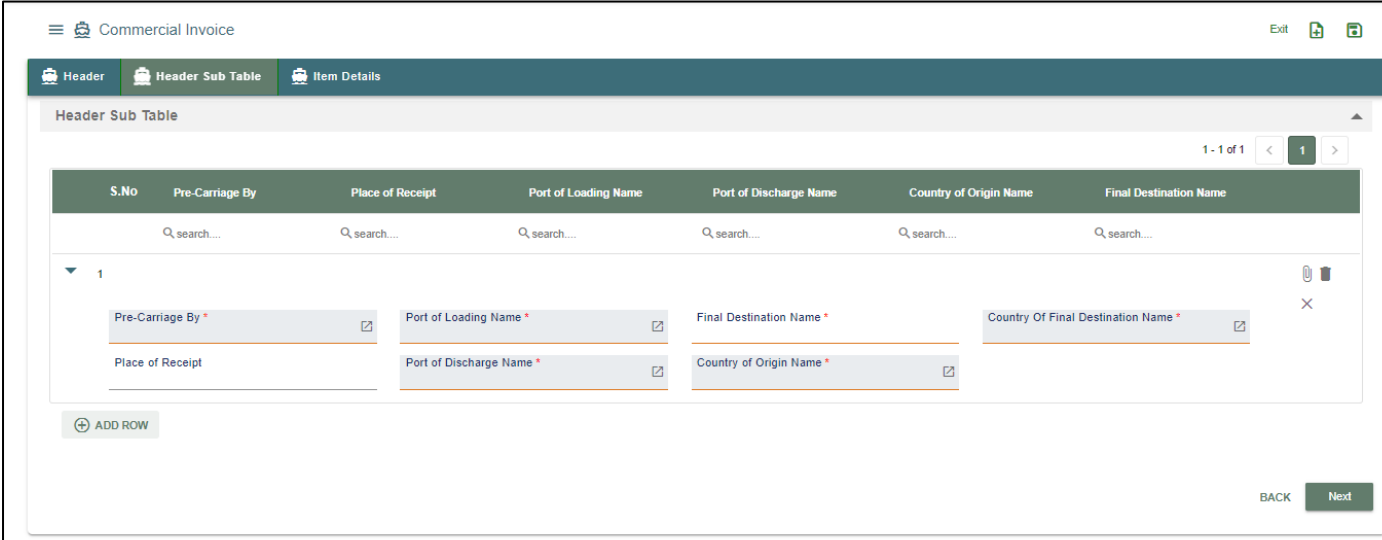
Below are the Field Information regarding Header Details Section.

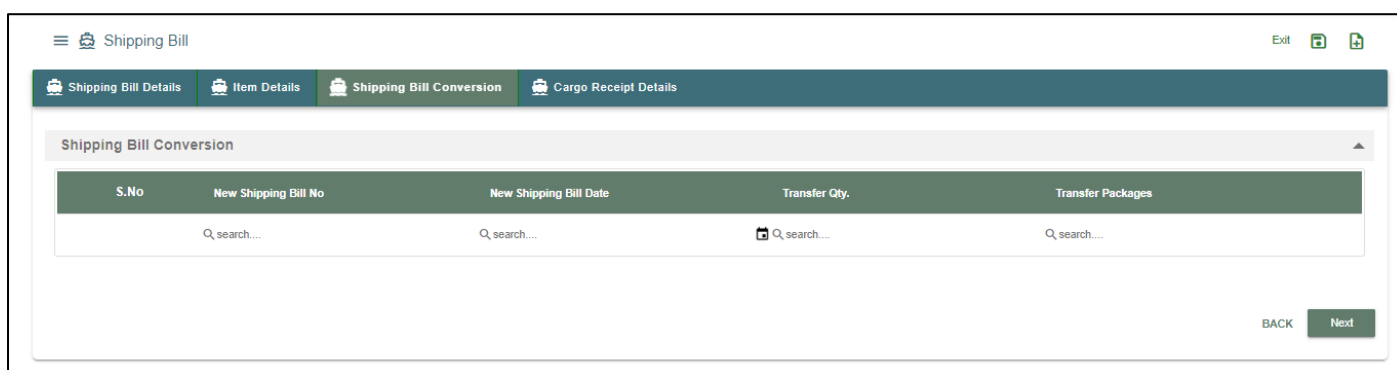(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Record Type	No	Autofill
Trade	yes	Dropdown
Application Type	yes	Dropdown
VCN NO	No	LOV
VESSEL NAME	No	Text Box
Voyage No		
Shipping bill No	No	LOV
IGM No	No	LOV
IE Code	Yes/No	LOV
Exporter Name	No	Autofill
Exporter Address 1	No	Autofill
Exporter Address 2	No	Autofill
Invoice No	Yes	Varchar
Invoice Date	Yes	Date
Consignee Name	Yes	TextBox
Consignee Address	No	TextBox
GST No	No	Varchar
Total Qty (Weight)	No	Text Box
Total No. of Pkgs	No	Text Box
Total No. of Containers	No	Text Box
Total Amount	No	Text Box
Currency	Yes	LOV
IA No.	No	Text Box
IA Date	No	Date
EA No.	No	Text Box
EA Date	No	Date

Step 2: Once data is filled in above Screen, click on save button ⊟ and proceed to click on **Next**

button for Header Sub Table screen shown below. Press ⊕ Add Row to enter the data if any.
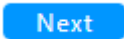
User Interface Image 58 – Commercial Invoice11.2
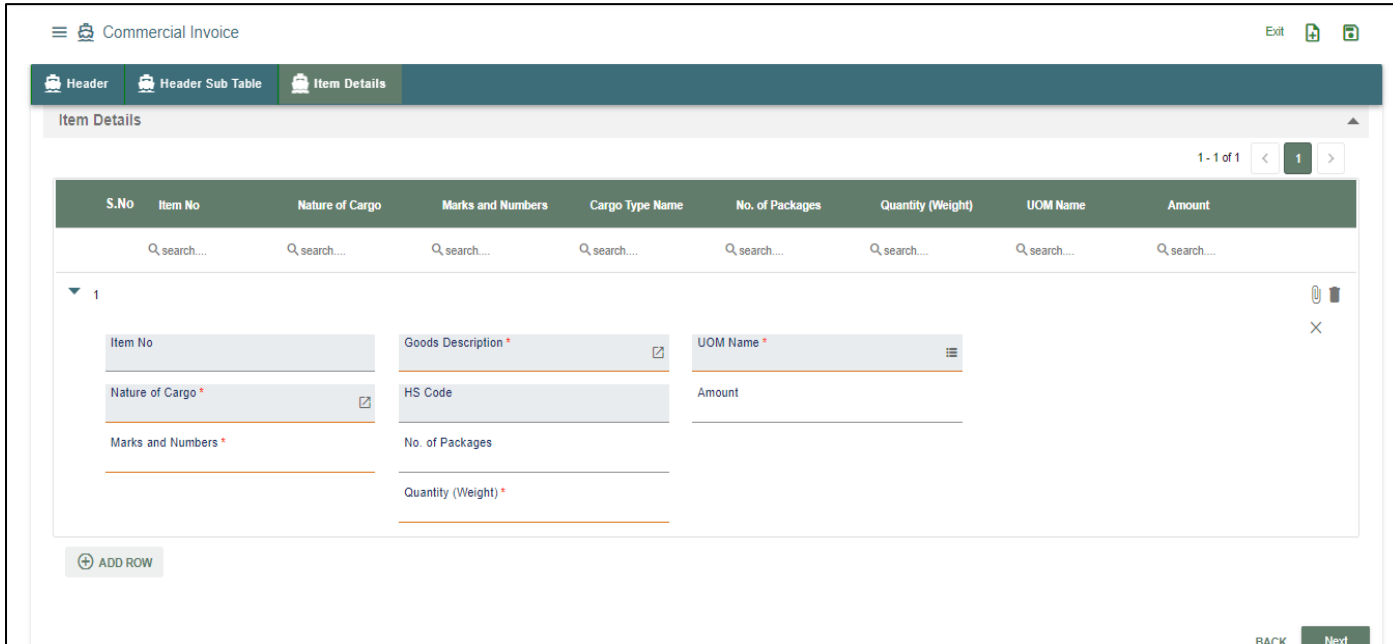
Below are the Field Information regarding Header Sub Table Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Item No	No	Numeric
Nature of Cargo	Yes	LOV
Marks & Numbers	Yes	Text Box
Cargo Code	No	LOV
Description of Goods	Yes	Text Box
HS Code		
NO. OF PKGS	Yes	Numeric
Package Type	Yes	LOV
QTY (Weight)	No	Numeric
UOM	No	Text Box
Amount	No	Text Box

Step 3: Once data is filled in above Screen, click on save button 💾 and proceed to click on **Next** button for Item Details screen shown below. Press ⊕ Add Row to enter the data if any.

User Interface Image 59 – Commercial Invoice11.3

Below are the Field Information regarding Item Line Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Item No	No	Numeric
Nature of Cargo	Yes	LOV
Marks & Numbers	Yes	Text Box

Cargo Code	No	LOV
Description of Goods	Yes	Text Box
HS Code		
NO. OF PKGS	Yes	Numeric
Package Type	Yes	LOV
QTY (Weight)	No	Numeric
UOM	No	Text Box
Amount	No	Text Box

Step 4: The above screen but still if want to add more line items it can be added with selection of

⊕ Add Row button and click on ⬚ button to save the new line item.

Step 5: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter

the valid data or information into the fields. And Click on 🗖 button. And On-screen notification will be LOV as

✔ Record saved

Step 6(a): Adding the files manually once the record got saved, Click on the 📎 icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on Upload ⬆ button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using 📎 icon system will display respective section name.

Attachments (1)   ✕

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☐ 1.	Custom Related Document	CUST DOC				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ↑   Close ✕

If the Attachment's are configured, System will display like below when we click on 🔗 icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Attachments (2)   ✕

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☐ 1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐ 2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ↑   Close ✕

Now Click on the Check boxes accordingly, then Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload ↥** button. System will display the status **File uploaded** on the screen.

Click On Close Button

Click on the Save button 🖫 from the top right corner to save Form. Once the record got saved successfully, then the system will display **✓ Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon system will display **Confirmation required** with below alert ok and Back

Alert Message ✕

ⓘ Do you want to cancel?

NO   YES

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

Cancellation ✕

Reason Description

Remarks

Requested By

Exit   Proceed

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to

CANCEL

By Clicking on ✓ we can view the status of the record

Step 16: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

Step 17: Click on 🗎 icon to new popup window will display. And can Clear / Search the records with multiple inputs.

By Clicking on 🔻 can clear the inputs in the columns. By Clicking on No of Records per page [10 ▼] Drop

down can select 10/20/30/40 records to view in List page.

By Clicking on ⟳ Load the records and display the data.

9. Business Function Name: Port Entry Permit

9.1. Definition:

Truck Permit is issued for the Trucks and its drivers to enter the port prohibited area to carry the imported cargo. Company can request for Truck Permit through online Portal. Request is received in iPortman® application for issuance of pass.

9.2. Navigation:

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⚏ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar →Gate Operation → Port Entry Permit→ Click on **Add New**
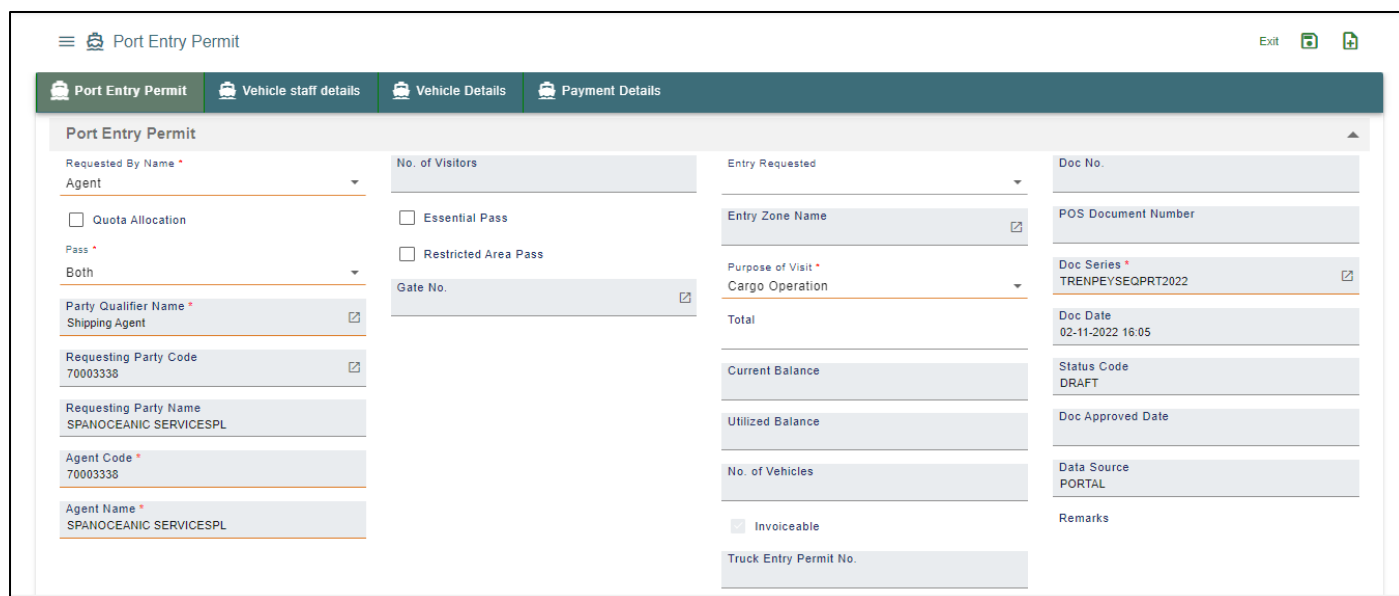
USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

9.3. Prerequisites – Masters

1. Party Qualifier Name
2. Requesting Party Code
3. Transporter Code

9.4. Screenshot:

Step 1: After Navigation to the respective function screen, User will move to list of Tables and Click on Add new button 🗋 . It will direct to the below screen in order to fill the data. If Pass=Both both vehicle staff details and vehicle details tabs are enable

User Interface Image 66 - Port Entry Permit Header Details13.1
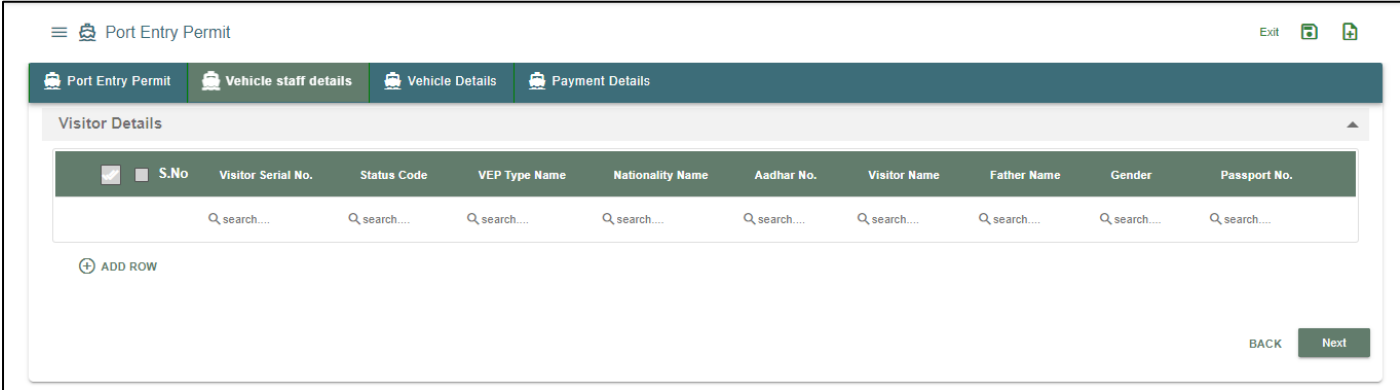
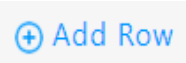Below are the Field Information regarding **Port Entry Permit Header** Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Requested By *	Mandatory	Drop Down
Pass	Mandatory	Drop Down
Party Qualifier Name	Mandatory	Popup
Requesting Party Code *	Mandatory	Popup
Requesting Party Name	Non Mandatory	Text Box
Entry Purpose*	Mandatory	Drop Down
Others	Mandatory	Text Box
Department Name*	Mandatory	Pop UP
Referred By	Non Mandatory	Text Box
Company Name*	Mandatory	Text Box
Contact Person*	Mandatory	Text Box
Contact No *	Mandatory	Text Box
Gate No *	Mandatory	Pop UP
Entry Allowed	Mandatory	Drop Down
Entry Zone *	Mandatory	Popup
Current Balance	Non Mandatory	Text Box
Utilized balance	Non Mandatory	Text Box
No. of Vehicles	Non Mandatory	Text Box
Invoiceable *	Mandatory	Drop Down
Truck Entry Permit No,	Non Mandatory	Text Box
Entry Request No	Non Mandatory	Text
Request Date & Time	Non Mandatory	Calendar
Remarks	Non Mandatory	Text
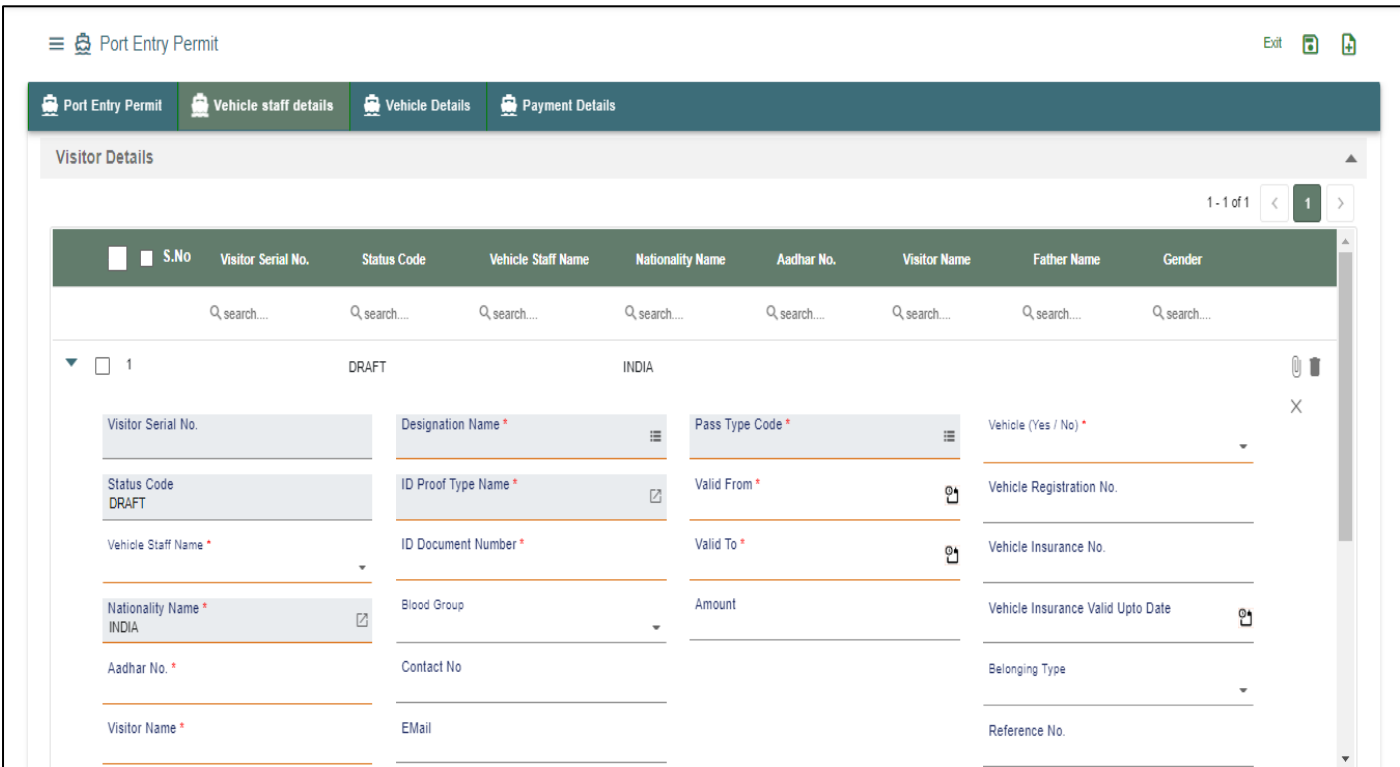
Step 2 – Once all the necessary fields are filled in Header Details Section, click ![Next] button from the bottom of the page of Header Details Section. User will go into Vehicle Staff Details Section.

User Interface Image 125-Port Entry Permit (Vehicle Staff Details)-19.5.3(a)

Click on ⊕ Add Row to begin with data entry

User Interface Image 126-Visitor Entry Permit (Vehicle Staff Details)-19.5.3(b)
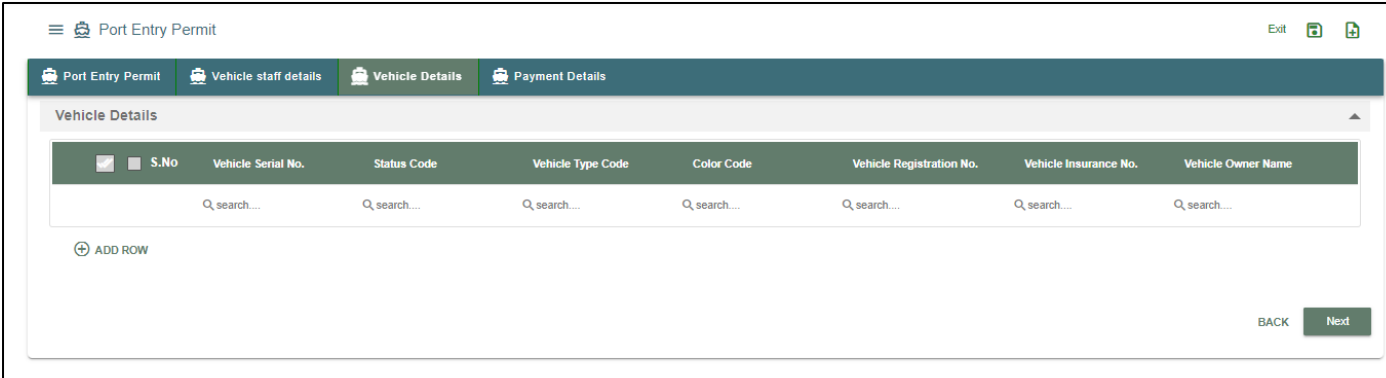
Below are the Field Information regarding **Vehicle Staff** Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)
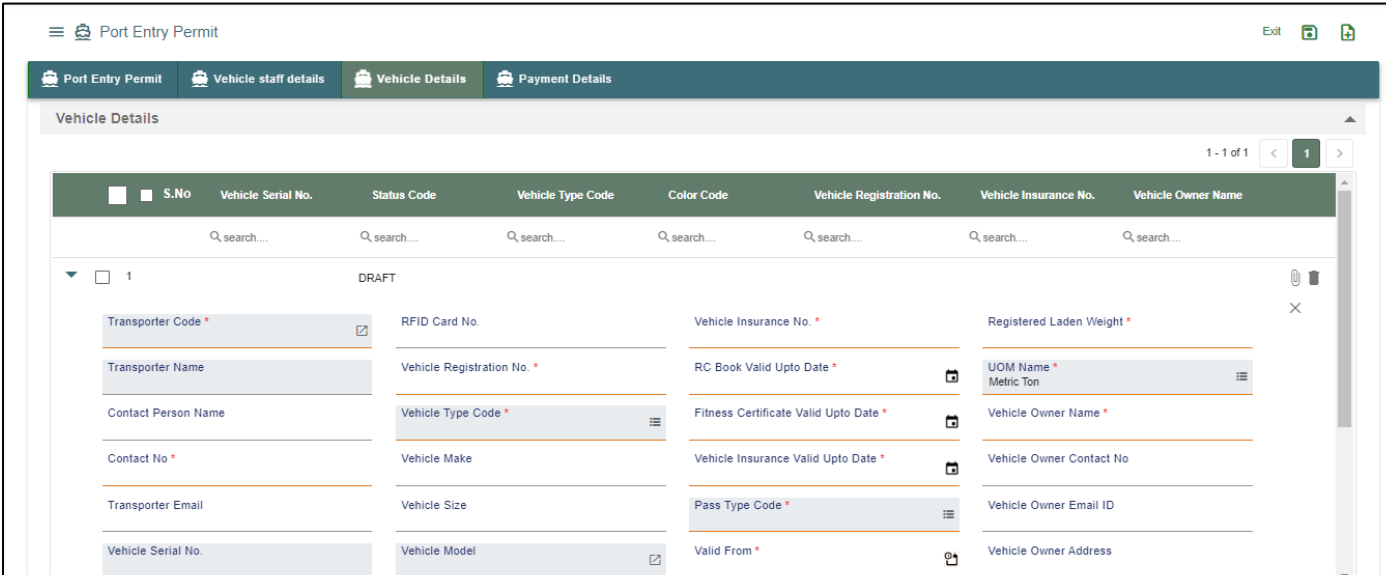
Field Name	Mandatory	Fill Type
VEP Type Name *	Mandatory	Drop Down
Nationality*	Mandatory	Popup
Aadhar No.	Mandatory	Text Box
Visitor Name *	Mandatory	Text Box
Father's Name *	Mandatory	Text Box
Gender *	Mandatory	Drop Down
DOB *	Non Mandatory	Date & Time Picker
Passport No*	Mandatory	Popup
Passport Issuing Country*	Mandatory	Date & Time Picker
Passport Validity*	Mandatory	Text Box
Visa No*	Mandatory	Date & Time Picker
Visa Validity*		
Designation	Mandatory ~~Non~~	LOV
Others	Mandatory	Text Box
Identity Proof Type *	Mandatory	Pop UP
ID Document Number *	Mandatory	Text Box
Blood Group	Non Mandatory	Drop Down
Contact No	Non Mandatory	Text Box
Email Id		
Address1 *	Mandatory	Text Box
Address2	Non Mandatory	Text Box
Auction		
Pass Type *	Mandatory	Popup
No. of Days	Mandatory	Text Box
Valid From *	Mandatory	Date & Time Picker
Valid To	Non Mandatory	Date & Time Picker **Auto Populated**
Police Verification No	Mandatory/Non-Mandatory	Text Box
Issued Date	Mandatory/Non-Mandatory	Date & Time Picker
Amount		
Vehicle (Yes / No) *	Mandatory	Drop Down
Vehicle Regd No *	Mandatory	Text Box
Vehicle Insurance No *	Mandatory	Text Box
Vehicle Insurance Valid Upto *	Mandatory	Date & Time Picker
Belonging Type	Non Mandatory	Dropdown
Reference No* / Remarks	Mandatory	Text Box
RFID Card No	Non Mandatory	Text Box

Step 3 – Once all the necessary fields are filled in Vehicle Staff Details Section, click Next button from the Bottom of Page then User will go into Vehicle Details Section.

Click on to begin with data entry
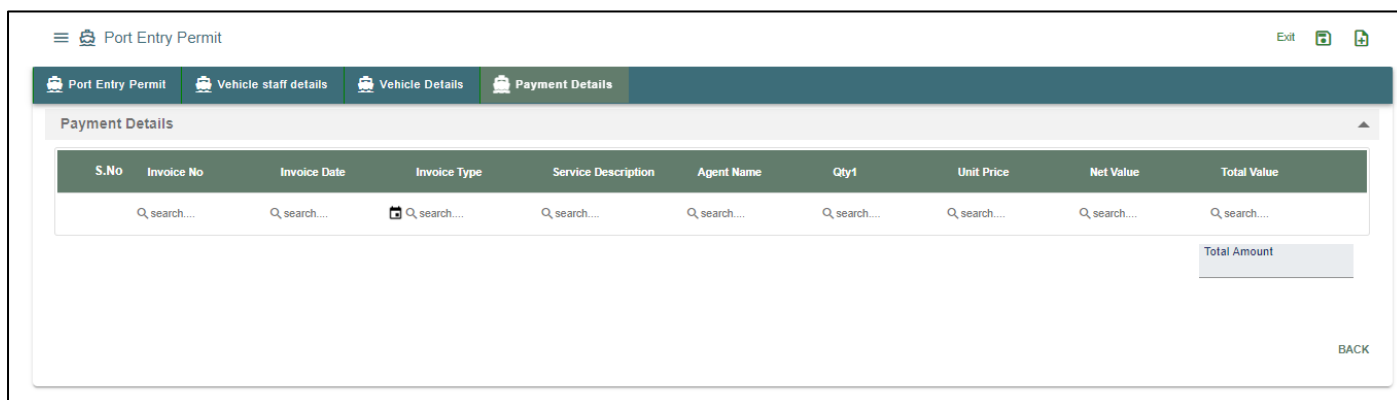
Below are the Field Information regarding **Vehicle** Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Transporter Code *	Mandatory	LOV
Transporter Name	Non Mandatory	Text Box
Contact Person	~~Mandatory~~ **Non Mandatory**	Text Box
Contact No *	Mandatory	Text Box
Transporter Email ID	Non Mandatory	Text Box
Vehicle Regd No *	Mandatory	Text Box
Vehicle Type Code *	Mandatory	LOV
Vehicle Make	Non Mandatory	Text Box
Vehicle Model	Non Mandatory	Calendar (Year only)
Colour	Non Mandatory	LOV
Vehicle Insurance No *	Mandatory	Text Box

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Vehicle Insurance Valid Upto **Date***	Mandatory	Date ~~& Time~~ Picker
RC Book Valid Upto **Date**	Mandatory ~~Non Mandatory~~	Date ~~& Time~~ Picker
Fitness Certificate Valid Upto **Date**	Mandatory ~~Non Mandatory~~	Date ~~& Time~~ Picker
Pass Type	Mandatory	Popup
No. of Days	Mandatory	Text Box
Valid From *	Mandatory	Date & Time Picker
Valid To	Non Mandatory	Date & Time Picker **Auto Populated**
Unladen Weight (Tare Weight)	Mandatory	Text Box
Registered Laden Weight	Mandatory	Text Box
UOM	Mandatory	LOV
Vehicle Owner Name	Mandatory	Text Box
Vehicle Owner Contact No	Non Mandatory	Text Box
Vehicle Owner Email ID	Non Mandatory	Text Box
Vehicle Owner Address	Non Mandatory	Text Box
Avg Trips Per Day		
Amount	Non Mandatory	Text Box
TEP No.	Non-Mandotry	LOV

Step 4 – Once all the necessary fields are filled in Vehicle Staff Details Section, click ▢ Next ▢ button from the Bottom of Page then User will go into Payment Details Section.

Below are the Field Information regarding **Payment** Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Invoice No.	Non Mandatory	Textbox
Invoice Date	Non Mandatory	Textbox
Invoice Type	Non Mandatory	Textbox
Agent Name	Non Mandatory	Textbox
Service Description	Non Mandatory	Textbox
Quantity 1	Non Mandatory	Textbox
UOM 1	Non Mandatory	Textbox
Quantity 2	Non Mandatory	Textbox

UOM2	Non Mandatory	Textbox
Unit Price	Non Mandatory	Textbox
Value Rs.	Non Mandatory	Textbox
Concession Rs.	Non Mandatory	Textbox
Assessible Value Rs.	Non Mandatory	Textbox
IGST	Non Mandatory	Textbox
CGST	Non Mandatory	Textbox
SGST	Non Mandatory	Textbox
Total Value Rs.	Non Mandatory	Textbox

Step 5: Adding the files manually once the record got saved, Click on the ⬚ icon. Then the user will be redirected to the popup window as below –

Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name		Valid From Date	Valid To Date	File Name	C
Permit Applictaion								
☐	1.		Cargo clearance letter from port 1	⌄				*F

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload ⬆** button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using ⬚ icon system will display respective section name.

Attachments (1) ×

	SNo.	Attachment Type Name	Attachment Name		Valid From Date	Valid To Date	File Name	C
Permit Applictaion								
☐	1.		Cargo clearance letter from port	1 ⌄				*F

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

If the Attachment's are configured, System will display like below when we click on [paperclip] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Attachments (1) ×

	SNo.	Attachment Type Name	Attachment Name		Valid From Date	Valid To Date	File Name	C
Permit Applictaion								
☐	1.		Cargo clearance letter from port	1 ⌄				*F

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display the status [File uploaded] on the screen.

Click On Close Button

Click on the Save button 🖬 from the top right corner to save Form. Once the record got saved successfully, then the system will display [✔ Record saved] message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◈ .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on ⬦ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on ⬦ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon system will display **Confirmation required** with below alert ok and Back

Alert Message ×

ⓘ Do you want to cancel?

NO   YES

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

Cancellation ×

Reason Description

Remarks

Requested By

Exit   Proceed

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to CANCEL

By Clicking on ✓ we can view the status of the record

Step 13: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 129-Visitor Entry Permit (List Data)-19.5.5

10. BUSINESS FUNCTION NAME: CARTING PERMISSION

10.1 DEFINITION

Carting Permission to be obtained by the exporter or CHA from Port authorities to move and store the cargo inside the port premises for export of the cargo. Exporter/CHA submits Carting permission through PCS / Portal same information is updated in iPortman® Application for review and Approval. Consignee/consignor/handling agent will get the cargo permission before arrival of the rake into the port.

10.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo → Request→ Carting Permission→Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME
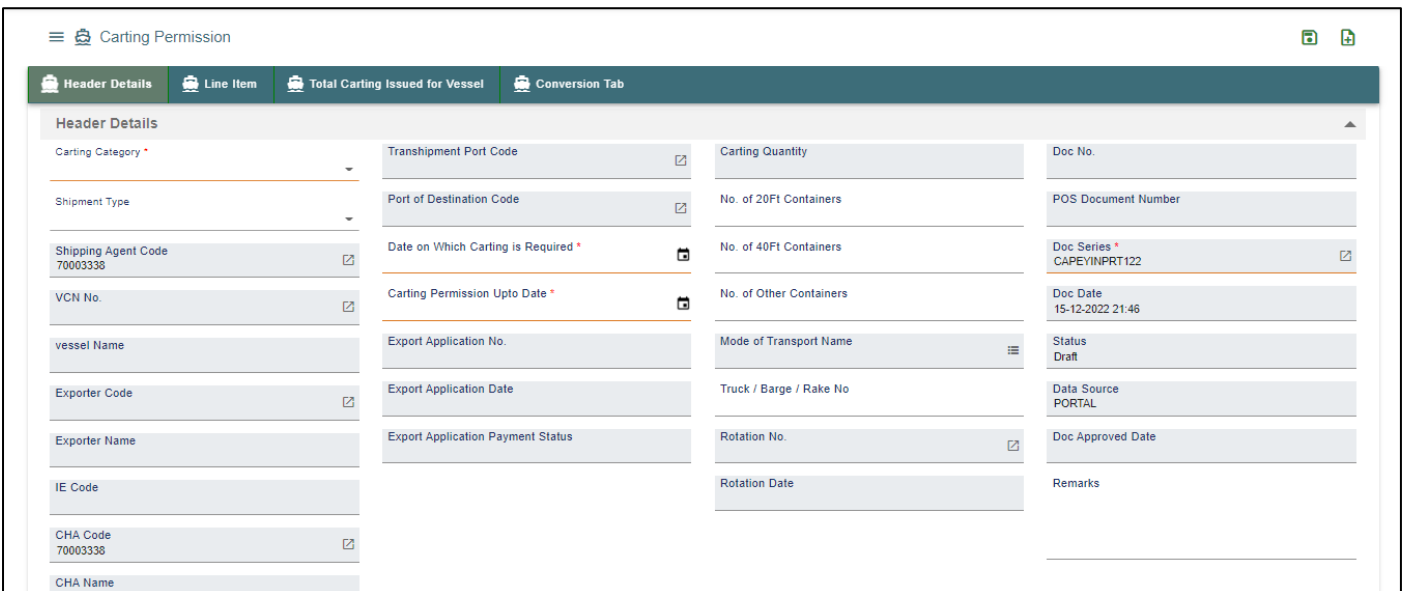
10.3 PREREQUISITES – MASTERS

1. Exporter
2. CHA
3. Reference Document Type
4. Cargo Code
5. Port
6. Berth
7. Gate

10.4 SCREENSHOT

Following screenshot from Carting Permission

Step 1- Click on Add new button 🔲. Wewill redirect to screen like below.

User Interface Image 20– Carting Permission 4.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Step 3: Click 🔲 button from Top Menu Bar to save Carting Permission record. Once it is saved Line Item Fields will be activated to add cargo details.

Below are the Field Information regarding **Port Entry Permit Header** Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field	Mandatory	Fill Type
Carting Category	Yes	Dropdown
Carting Type	Yes	Dropdown
VCN	Yes/No	LOV
Vessel Name	No	Text Box
Exporter Code	Yes	Popup
Exporter Name	No	Auto fill
CHA Code	No	Popup
CHA Name	No	Auto fill
Shipping Agent Code	No	LOV
Liner Name	No	Popup
Transhipment Port	No	LOV
Port of Destination	Yes	LOV
Date on Which Carting is Required	Yes	Calendar
Carting Up to Date (Permission)	Yes	Calendar
Check list No	No	Popup
Check list Date	No	Calendar
Shipping Bill No	No	LOV
Shipping Bill Date	No	Calendar
Export Application No	No	LOV
Export Application Date	No	
Export Application Payment Status	No	
RI No.		
RI Date		
RI Quantity		
No.of 20 Feet Container	No	Text Box
No.of 40 Feet Container	No	Text Box
No.of Other Container	No	Text Box
Mode of Transport	Yes	Dropdown
Truck Number/Barge Number/Rake Number	No	Text Box
Rotation no	No	LOV
Rotation Date	No	Calendar
Type of Cargo	Yes	Dropdown
Invoice No	Yes	Popup
Item No	Yes	Popup
ITC HS Code	No	Popup
Cargo Description	Yes	List
Weight in Tons	Yes	Text Box
No of Pkgs.	Yes	Text Box
Plot Allotment No.	Yes	Popup
Yard Location / CFS	Yes	LOV
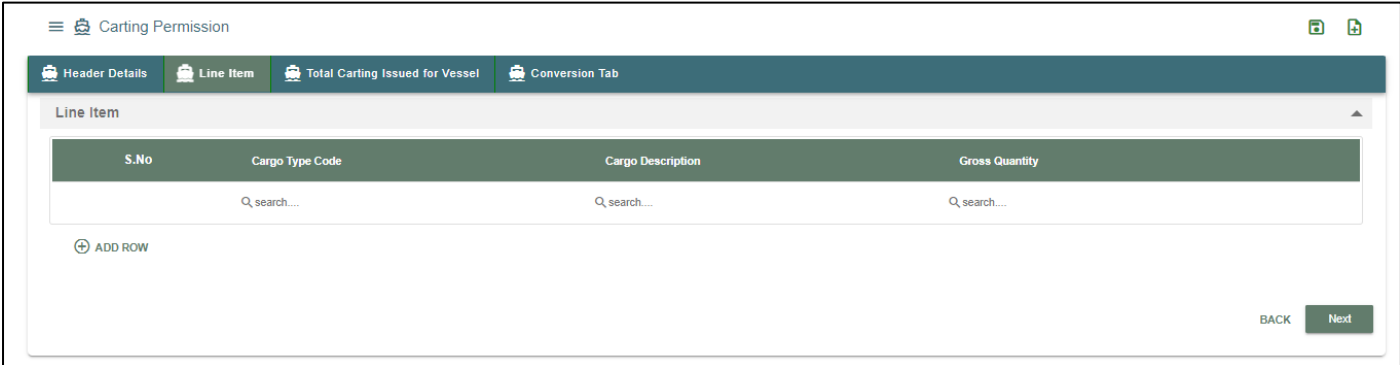
Type of Package	No	
Marks & Numbers	No	
Gross Quantity	Yes	
Unit of Quantity Code	Yes	
Plot Storage Allotment No	Yes/No	
Zone Code	No	
Yard Location / CFS	No	LOV
Remarks		Text Box
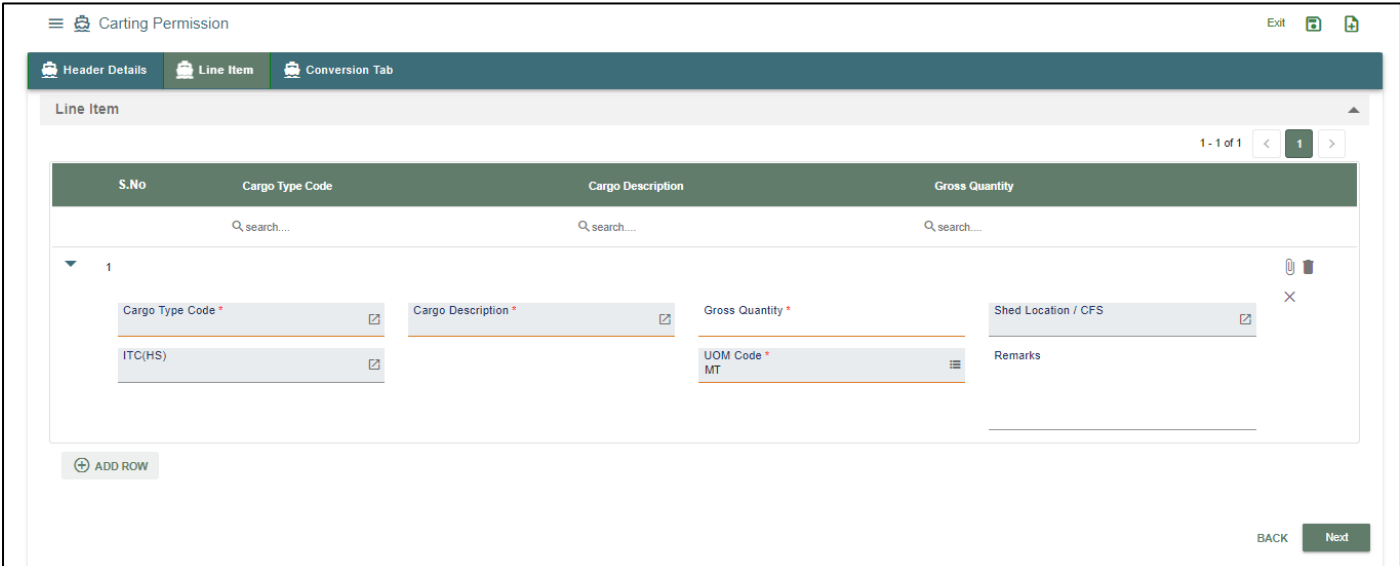
Step 4: Once Caring Request Details are saved, Line Item Section will be activated as below to add cargo details as shown in below screen.

Carting Category=Vessel Carting

User Interface Image 21– Carting Permission (Cargo Lines) 4.5.2
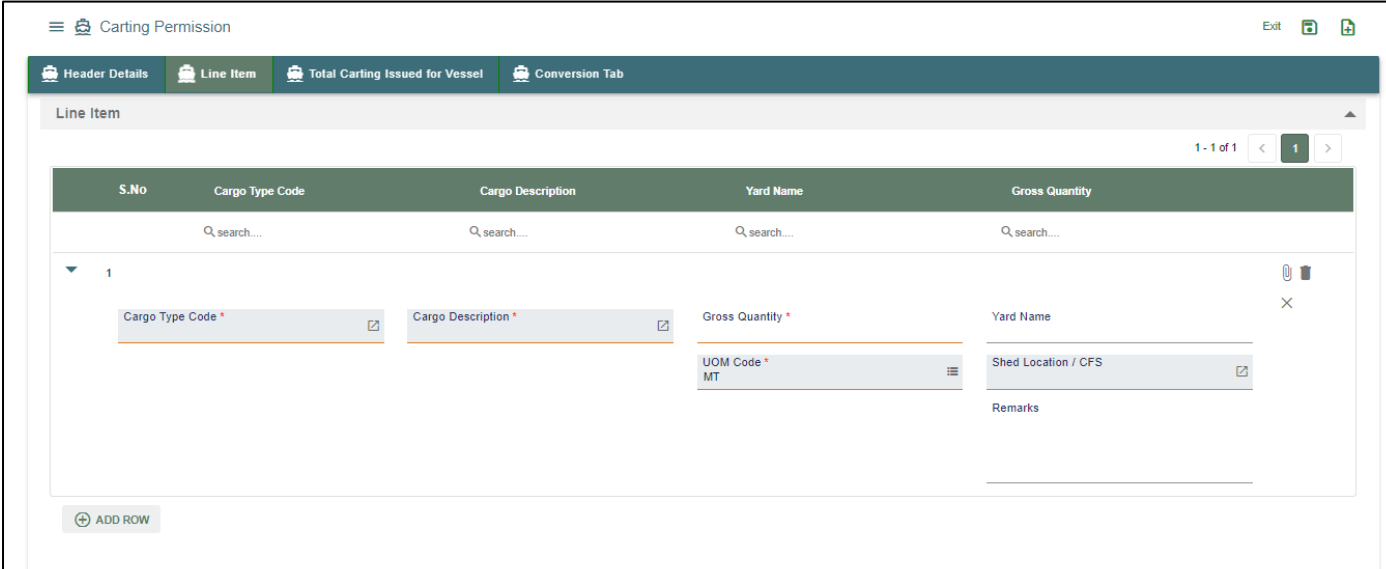
Carting Type=Shed Carting

Click on to begin with data entry
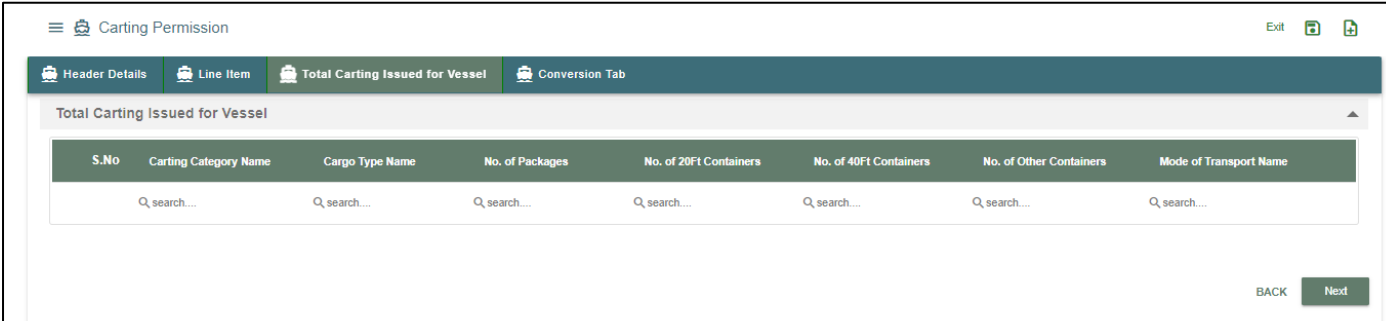
If Carting Category=Vessel carting

User Interface Image22-Carting Permission (Line Item Details) 4.5.3
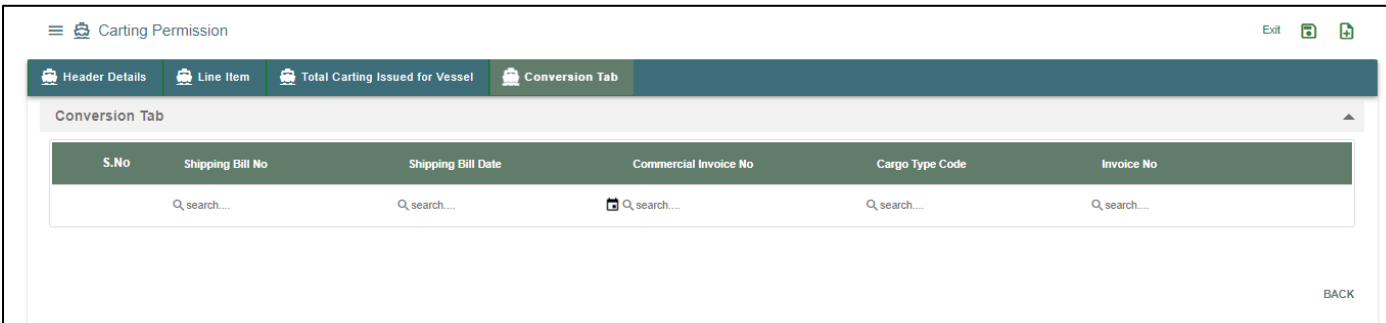
Step 5: Once Line Item Details are saved, Total Carting Issued for Vessel will be activated as below to add cargo details as shown in below screen.

If Carting Category=Vessel Carting

User Interface Image 23– Carting Permission (Total Carting Issued for Vessel) 4.5.4

Step 6: Once data is filled in Total Carting Issued for Vessel, click on save button and Conversion Tab screen activated as below

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Adding the files manually once the record got saved, Click on the [📎] icon. Then the user will be redirected to the popup window as below –

Click on [+ Add files] button/ Drag Files here,to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [📎] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [📎] icon.

Respective Form Name, Section name will display to attach the documents*File Required.

Attachments (2) ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

Now Click on the Check boxes accordingly, then Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (2) ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☑	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☑	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

Once all the mandatory and required fields are filled then Click on Upload ⬆ button. System will display the status **File uploaded** on the screen.

Click On Close Button

Click on the Save button ⬚ from the top right corner to save Form. Once the record got saved successfully, then the system will display ✅ Record saved message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◇.

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on ⬦ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval ✕

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Step9: Once the user Approve the request the following **Successfully Status changed to WFAPP** status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on ⬦ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

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Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon

system will display **Confirmation required** with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 27-Carting Permission List Page -4.5.8

11. Business Function Name: Cargo and Container Gate Permit

11.1 Definition:

11.2 Navigation

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar →Cargo → Others → Cargo and Container gate Permit → Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME
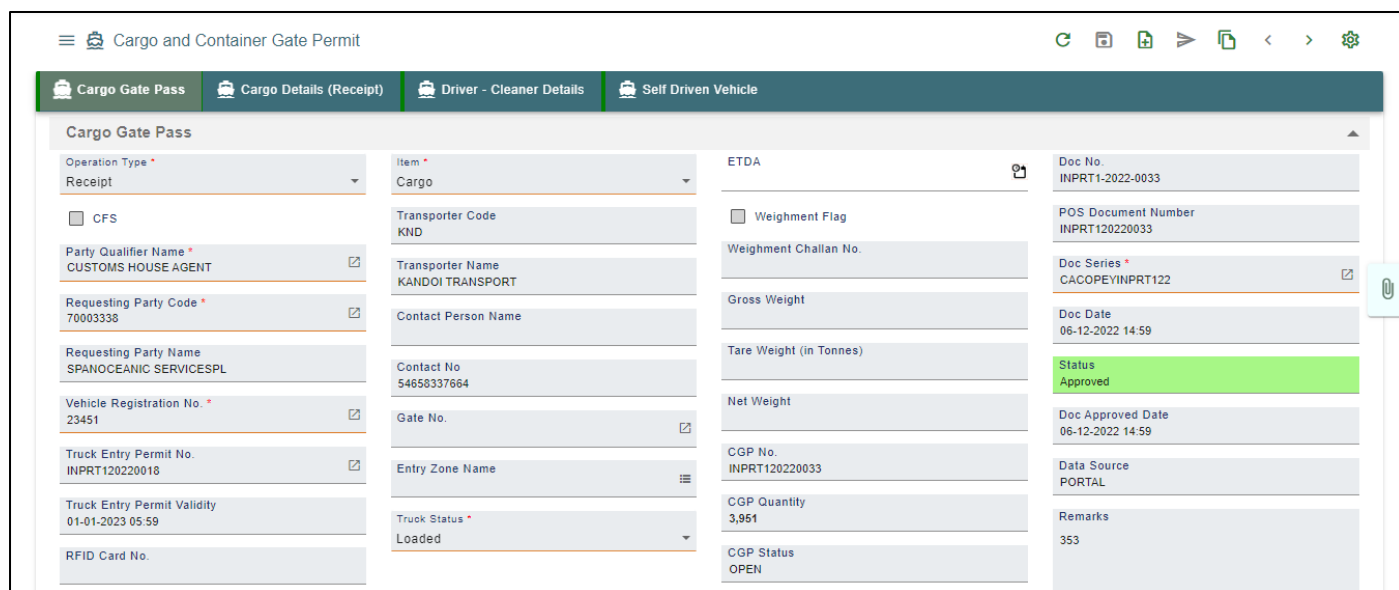
11.3 Prerequisites – Masters

1. Operation Type
2. Party Qualifier Name
3. Requesting Party Code
4. Vehicle Regd. no
5. Truck Status

11.4 Screenshot

Step 1: After Navigation to the respective function screen, Click on Add new button 🗋 . it will direct to the below screen in order to fill the data.

User Interface Image 77- Cargo and Container gate Permit Header Details15.1

Below are the Field Information regarding Cargo Gate Pass **Header** Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Operation Type	Mandatory	Dropdown
Party Qualifier Name	Mandatory	LOV
Requesting Party Code	Mandatory	LOV
Requesting Party Name	Not Mandatory	Textbox
Vehicle Regd No	Mandatory	LOV
Truck Entry Permit No	Not Mandatory	LOV
Truck Entry Permit Validity	Not Mandatory	Textbox
RFID Card No	Not Mandatory	Textbox
Registered Laden Weight	Not Mandatory	Textbox
Item	Not Mandatory	Dropdown
Transporter Code	Not Mandatory	Textbox
Transporter Name	Not Mandatory	Textbox
Contact Person Name	Not Mandatory	Textbox
Contact No	Not Mandatory	Textbox
Gate No	Not Mandatory	LOV
Entry Zone Name	Not Mandatory	LOV
Truck Status	Mandatory	Dropdown
Gate In Window From	Not Mandatory	Calendar
Gate In Window Up to	Not Mandatory	Calendar
Cut Off Date and Time	Not Mandatory	Calendar
ETDA	Not Mandatory	Calendar
CGP NO	Not Mandatory	Textbox
CGP Quantity	Not Mandatory	Textbox

Step 2: Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on save button 🖫 and proceed to click on **Next** button for Cargo Details (Receipt/Delivery). This Details are auto populated based on selection of Vehicle Regd No in Header

User Interface Image 78- Cargo and Container gate Permit Cargo Details (Delivery) 15.2

Below are the Field Information regarding Cargo Details (Receipt/Delivery) Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Shed Delivery Order	Not Mandatory	Textbox
IGM No	Not Mandatory	Textbox
IGM Date	Not Mandatory	Textbox
Line No	Not Mandatory	Textbox
Sub Line No	Not Mandatory	Textbox
Bill of Entry No	Not Mandatory	Textbox
Bill of Entry Date	Not Mandatory	Textbox
Delivery Order No	Not Mandatory	Textbox
Out of Charge No	Not Mandatory	Textbox
Import Application No	Not Mandatory	Textbox
BDF No	Not Mandatory	Textbox
Auction Sale No	Not Mandatory	Textbox
Auction Date	Not Mandatory	Textbox
TP No	Not Mandatory	Textbox
IE Code	Not Mandatory	Textbox
Party Name	Not Mandatory	Textbox
Address 1	Not Mandatory	Textbox
Address 2	Not Mandatory	Textbox
Address 3	Not Mandatory	Textbox
CHA Name	Not Mandatory	Textbox

Item Type Name	Not Mandatory	Textbox
Nature of Cargo	Not Mandatory	Textbox
Goods Description	Not Mandatory	Textbox
ITC(HS)	Not Mandatory	Textbox
No of Packages	Not Mandatory	Textbox
Marks and Numbers	Not Mandatory	Textbox
Tonnage	Not Mandatory	Textbox
UOM Name	Not Mandatory	Textbox
Shed/Storage Location	Not Mandatory	Textbox
Chappa No	Not Mandatory	Textbox
Chappa Date	Not Mandatory	Textbox
Remarks	Not Mandatory	Textbox

Step 3: Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on save button 🖫 and proceed to click on **Next** button for Container Details. And Press ⊕ Add Row to enter the data.

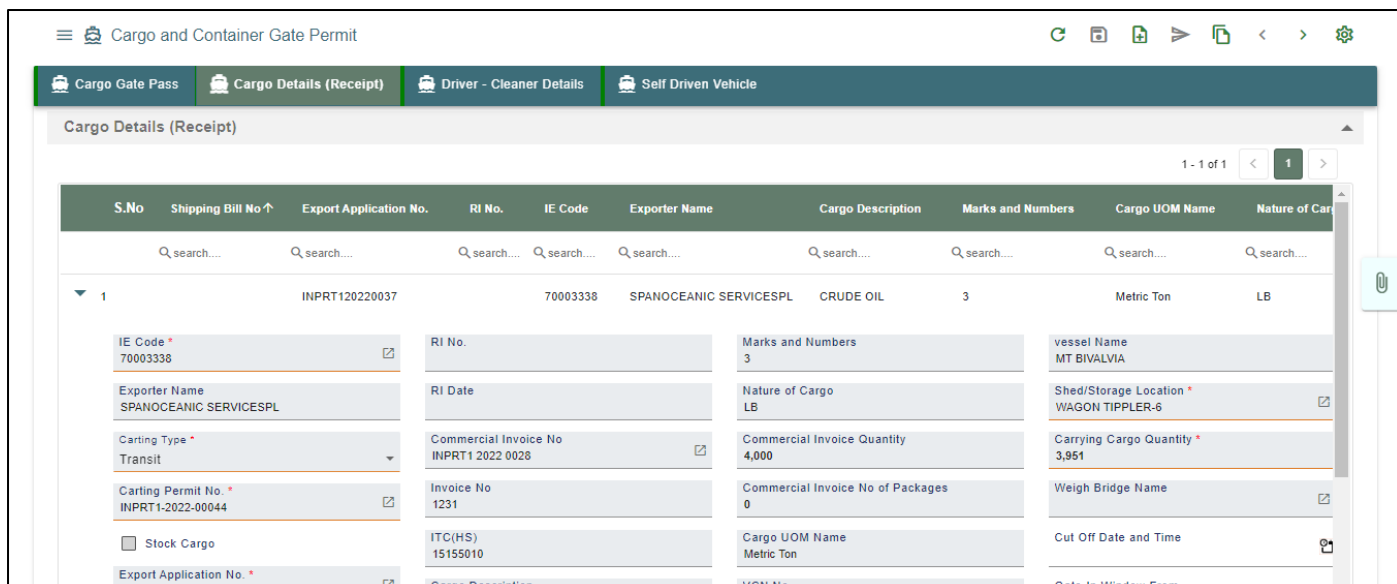*User Interface Image 79- Cargo and Container gate Permit Container Details15.3*

Below are the Field Information regarding Container Details (Receipt/Delivery) Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Shed Delivery Order	Not Mandatory	Textbox
IGM No	Not Mandatory	Textbox
IGM Date	Not Mandatory	Textbox

Line No	Not Mandatory	Textbox
Sub Line No	Not Mandatory	Textbox
Bill of Entry No	Not Mandatory	Textbox
Bill of Entry Date	Not Mandatory	Textbox
Delivery Order No	Not Mandatory	Textbox
Out of Charge No	Not Mandatory	Textbox
Import Application No	Not Mandatory	Textbox
BDF No	Not Mandatory	Textbox
Auction Sale No	Not Mandatory	Textbox
Auction Date	Not Mandatory	Textbox
IE Code	Not Mandatory	Textbox
Party Name	Not Mandatory	Textbox
Address 1	Not Mandatory	Textbox
Address 2	Not Mandatory	Textbox
Address 3	Not Mandatory	Textbox
CHA Name	Not Mandatory	Textbox
Container No	Not Mandatory	Textbox
Container Size	Not Mandatory	Textbox
Container Status	Not Mandatory	Textbox
ISO Code	Not Mandatory	Textbox
Goods Description	Not Mandatory	Textbox
Nature of Cargo	Not Mandatory	Textbox
No of Packages	Not Mandatory	Textbox
Marks and Numbers	Not Mandatory	Textbox
Tonnage	Not Mandatory	Textbox
UOM Name	Not Mandatory	Textbox
Shed/Storage Location	Not Mandatory	Textbox
Chappa No	Not Mandatory	Textbox
Chappa Date	Not Mandatory	Textbox
Remarks	Not Mandatory	Textbox

Step 4: Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on

save button 🔲 and proceed to click on **Next** button for Driver-Cleaner Details. And Press

⊕ Add Row to enter the data.

User Interface Image 80 - Cargo and Container gate Permit Driver-Cleaner Details15.4

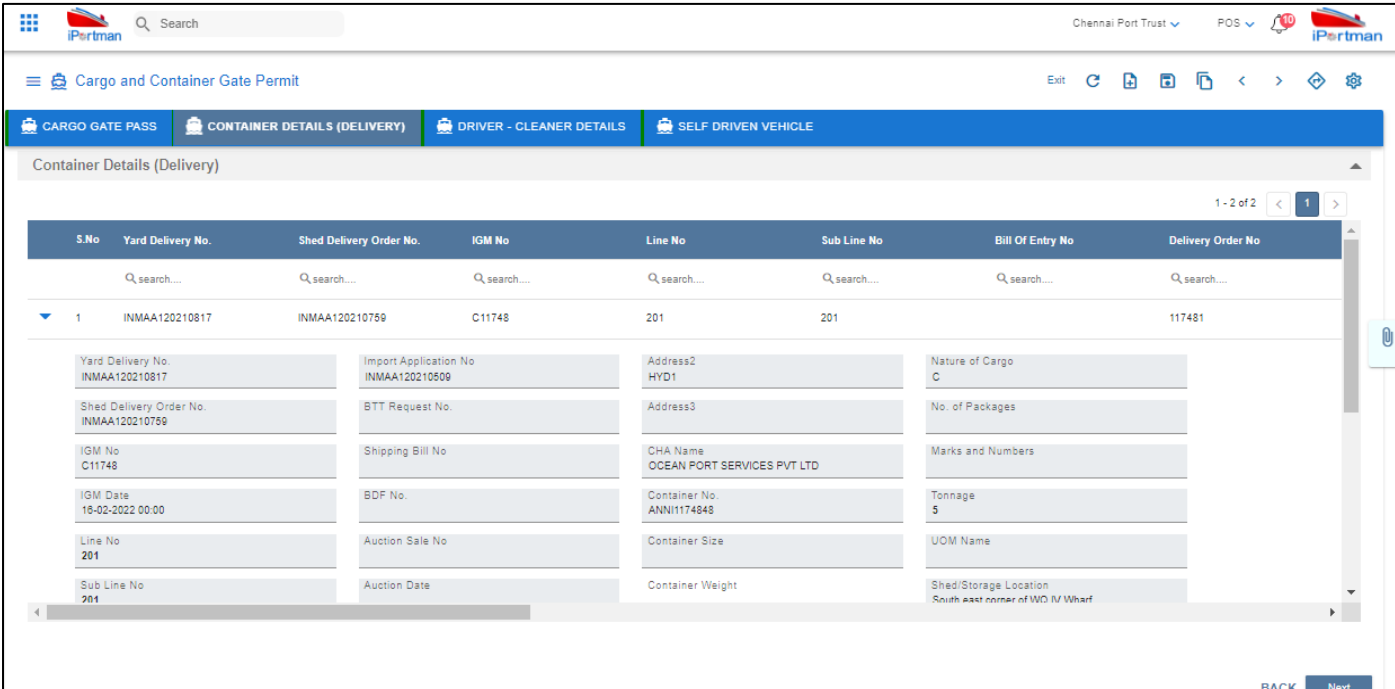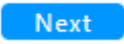Below are the Field Information regarding Driver-Cleaner Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Driver Aadhar No	Mandatory	Textbox
Driver Name	Not Mandatory	Textbox
VEP No	Not Mandatory	Textbox
VEP Type	Not Mandatory	Textbox
VEP Validity	Not Mandatory	Textbox
Cleaner Aadhar No	Mandatory	Textbox
VEP No	Not Mandatory	Textbox
VEP Type	Not Mandatory	Textbox
VEP Validity	Not Mandatory	Textbox
Cleaner Name	Not Mandatory	Textbox

Step 5(a): Adding the files manually once the record got saved, Click on the [icon] icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on Upload ⬆ button. System will display File uploaded status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using 📎 icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on 📎 icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Truck Gate Pass							
☐	1.		Request for Entry Permit 1 ⌄				*File Req

◄   ►

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Truck Gate Pass							
☐	1.		Request for Entry Permit 1 ⌄				*File Req

◄   ►

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display the status [File uploaded] on the screen.

Click On Close Button

Click on the Save button ⬜ from the top right corner to save Form. Once the record got saved successfully, then the system will

display ✅ **Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◇ .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on ◇ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP
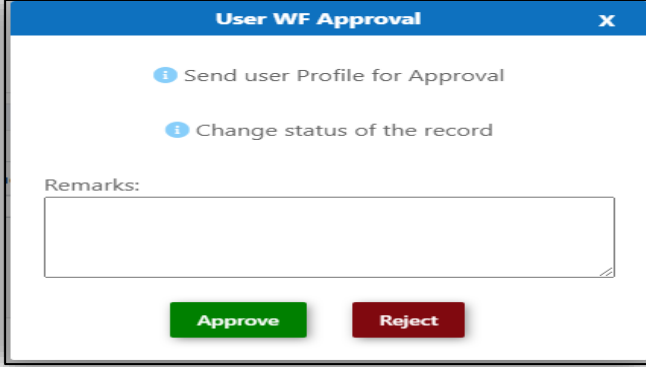
Step9: Once the user Approve the request the following   status will be shown on the screen and the document status will be changed as 'WFAPP'. .
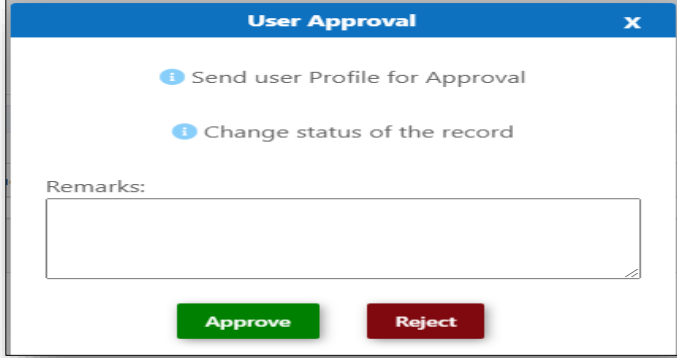
Successfully rejected.

If user reject the request following alert will display on the screen.   And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on   the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to APPROVED

Step11: Once the user Approve the request the   following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

Successfully rejected.

display on the screen.   And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon

system will display **Confirmation required** with below alert ok and Back

Alert Message ×

ⓘ Do you want to cancel?

NO   YES

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

Cancellation ×

Reason Description ⧉

Remarks

Requested By

Exit   Proceed

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

By Clicking on ◑ we can view the status of the record

Data Submit Status X

Pos Integration

Status: SUCCESS

End Point Code	Status	Response
IPAPRJCTCARCONPESAP	SUCCESS	{ "status":"message received" }

Step 15: Upon Save / Approve /Reject /Cancel the record that can be seen in [List Data] as Draft/Approved/Rejected/Cancel Status respectively

Step 16: Click on icon to new popup window will display. And can Clear / Search the records with multiple inputs.

By Clicking on can clear the inputs in the columns. By Clicking on No of Records per page Drop down can select 10/20/30/40 records to view in List page.

By Clicking on Load the records and display the data.

12. Business Function Name: Truck Weighment

12.1   Definition:

After entering the Truck inside Port gate, it undergoes for the Weighment of Tare weight recording. Before the loading of Cargo into vehicle from Shed or Berth Area.

After completion of Truck Shed Operation, Vehicle will go for Truck Weighment in order to assess the Gross Weight of the truck. Based on Gross weight and Tare weight done earlier will accessed the Net quantity of cargo loaded in the truck

12.2   Navigation

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar → Gate Operation → Truck Weighment→ Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME
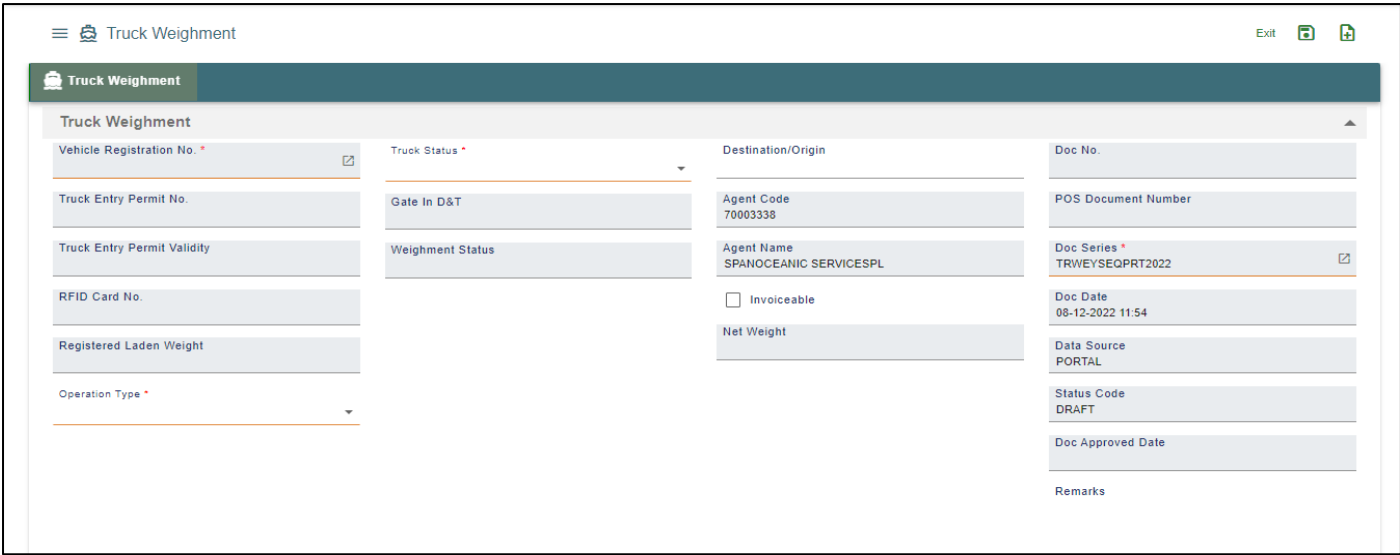
12.3   Prerequisites – Masters

1. Driver master
2. Billing Agent
3. Weighbridge
4. Destination
5. Cargo
6. Transporter

12.4 Screenshot

Step 1: After Navigation to the respective function screen, Click on Add new button ⊞ . it will direct to the below Truck Weighment Header screen in order to fill the data.

If Truck Status = Empty

User Interface Image 86 - Truck Weighment Header Details 17.1

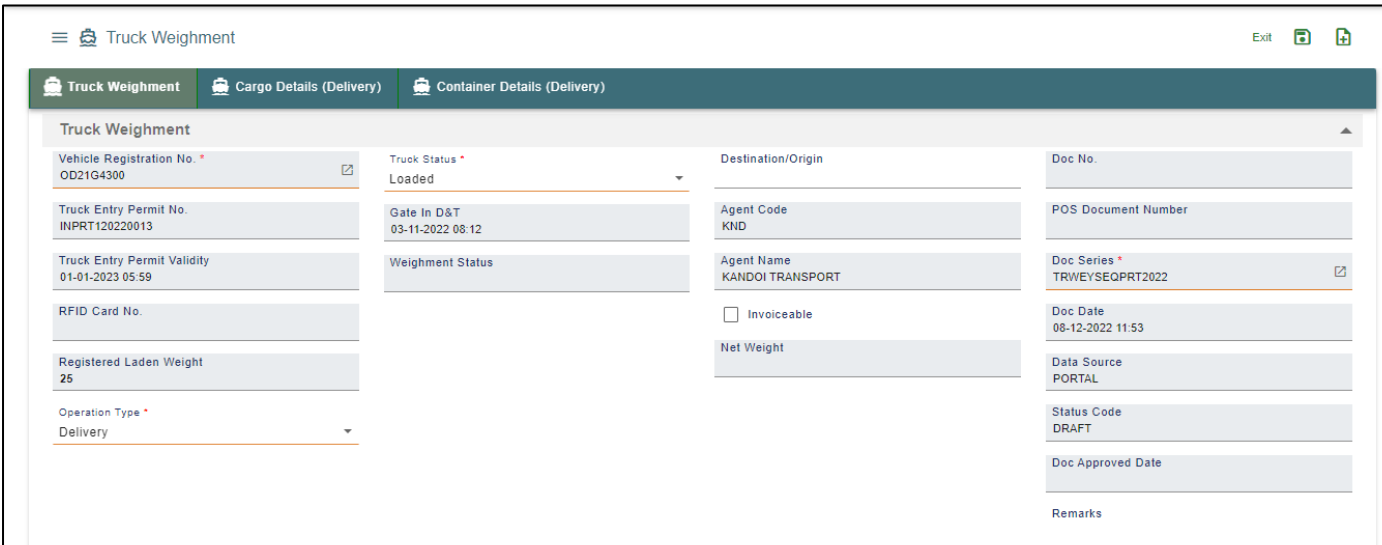Below are the Field Information regarding Truck Weighment Header Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Vehicle Regd No	Yes	LOV
Truck Entry Permit No	No	Textbox
Truck Entry Permit Validity	No	Textbox
RFID Card No	No	Textbox
Registered Laden Weight	No	Textbox
Operation Type	Yes	Dropdown
Truck Status	Yes	Dropdown
Gate In D&T	No	Calendar
Weighment Status	No	Textbox
Destination/Origin	No	Textbox
Agent Code	No	Textbox
Agent Name	No	Textbox

Invoiceable	No	Check Box
Net Weight	No	Textbox
Weighment Type	No	Textbox
Tare Weight	Yes	Textbox
Weigh Bridge Name	Yes	LOV
Weighment D&T	Yes	Calendar
Remarks	No	Textbox
Gross Weight	Yes	Textbox

If Truck status-loaded below Screen will show.

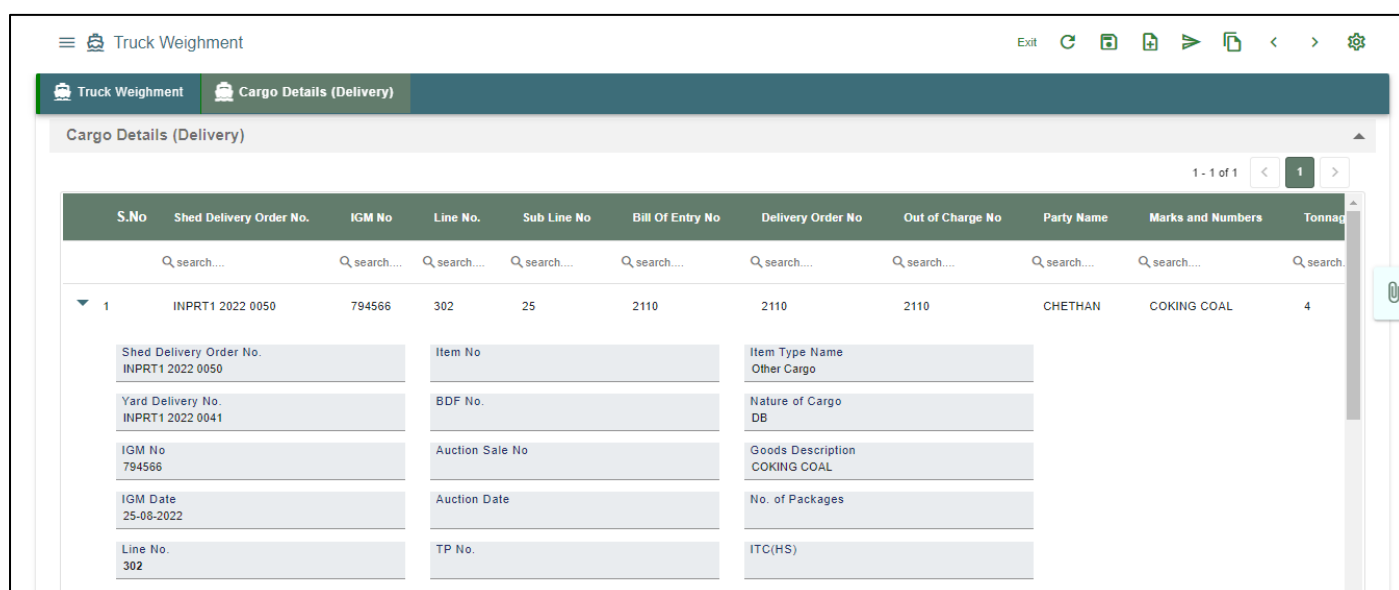Below are the Field Information regarding Truck Weighment Header Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Vehicle Regd No	Yes	LOV
Truck Entry Permit No	No	Textbox
Truck Entry Permit Validity	No	Textbox
RFID Card No	No	Textbox
Registered Laden Weight	No	Textbox
Operation Type	Yes	Dropdown
Truck Status	Yes	Dropdown
Gate In Details	No	Textbox
Weighment Status	No	Textbox
Destination/Origin	No	Textbox
Agent Code	No	Textbox
Agent Name	No	Textbox
Invoiceable	No	Check Box
Net Weight	No	Textbox
Weighment Type	No	Textbox

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Gross Weight	Yes	Textbox
Weigh Bridge Name	Yes	LOV
Weighment D&T	Yes	Calendar
Gross Remarks	No	Textbox

Step 2:-Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on save button 🖫 and proceed to click on **Next** button for Cargo Details (Receipt/Delivery). This Details are auto populated based on selection of Vehicle Regd No in Header

Below are the Field Information regarding Cargo Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Shed Delivery Order No	No	Textbox
IGM No	No	Textbox
IGM Date	No	Textbox
Line No	No	Textbox
Sub Line No	No	Textbox
Import Application No	No	Textbox
Bill of Entry No	No	Textbox
Bill of Entry Date	No	Textbox
Delivery Order No	No	Textbox
Out of Charge No	No	Textbox
BTT No	No	Textbox
SB No	No	Textbox
Item No	No	Textbox
BDF No	No	Textbox

Auction Sale No	No	Textbox
Auction Date	No	Textbox
TP No	No	Textbox
IE Code	No	Textbox
Party Name	No	Textbox
Address 1	No	Textbox
Address 2	No	Textbox
Address 3	No	Textbox
CHA Name	No	Textbox
Item Type Name	No	Textbox
Nature of Cargo	No	Textbox
Goods Description	No	Textbox
No of Packages	No	Textbox
ITC(HS)	No	Textbox
Marks and Numbers	No	Textbox
Tonnage	No	Textbox
UOM Name	No	Textbox
Shed/Storage Location	No	Textbox
Chappa No	No	Textbox
Chappa Date	No	Textbox
Shed Delivery Order No	No	Textbox
IGM No	No	Textbox
IGM Date	No	Textbox
Line No	No	Textbox
Sub Line No	No	Textbox
Import Application No	No	Textbox
Bill of Entry No	No	Textbox
Bill of Entry Date	No	Textbox
Delivery Order No	No	Textbox
Out of Charge No	No	Textbox
BTT No	No	Textbox
SB No	No	Textbox
Item No	No	Textbox
BDF No	No	Textbox
Auction Sale No	No	Textbox
Auction Date	No	Textbox
IE Code	No	Textbox
Party Name	No	Textbox
Address 1	No	Textbox
Address 2	No	Textbox
Address 3	No	Textbox
CHA Name	No	Textbox
Container No	No	Textbox
Container Size	No	Textbox
Container Status	No	Textbox
ISO Code	No	Textbox

Goods Description	No	Textbox
Nature of Cargo	No	Textbox
No of Packages	No	Textbox
Marks and Numbers	No	Textbox
Tonnage	No	Textbox
UOM Name	No	Textbox
Shed Location	No	Textbox
Chappa No	No	Textbox
Chappa Date	No	Textbox

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields. And Click on [ ] button. And On-screen notification will be LOV as below

Step 3(a): Adding the files manually once the record got saved, Click on the [ ] icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [ ] icon system will display respective section name.

Attachments (1) ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Custom Related Document	CUST DOC				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

If the Attachment's are configured, System will display like below when we click on [📎] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Attachments (2) ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (2)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☑	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☑	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ↥   Close ✕

Once all the mandatory and required fields are filled then Click on [Upload ↥] button. System will display

the status [**File uploaded**] on the screen.

Attachments (2)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☑	1.	Custom Related Document	Transhipment Permit				*File Required
☐	2.	Cargo Related Documents	International Load Line Certificate				*File Required

+ Add files   **Select files**

or

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	Certificate Name	Clear
1.	Custom Related	Transhipmen ⬈	☐	☐	CHPT--CQA--SDO--BTT.png (224.39 kb)	🗑

Upload ↥   Close ✕

Click On Close Button

Click on the Save button 🖫 from the top right corner to save Form. Once the record got saved successfully, then the system will

display [✅ **Record saved**] message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

Successfully rejected.

If user reject the request following alert will display on the screen. And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon

system will display **Confirmation required** with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to

CANCEL

By Clicking on ✓ we can view the status of the record

Data Submit Status   **X**

Pos Integration

Status: SUCCESS

End Point Code	Status	Response
IPAPRJCTTRUWEISAP	SUCCESS	{ "status":"message received" }

Step 13: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

☰ 🚛 Truck Weighment

Doc No.	Status	Vehicle Registration No.	Truck Entry Permit No.	Truck Entry Permit Validity	Truck Status	Doc Date	Doc Approved Date	Dat:
INMAA120220007	Approved	2345678fr	INMAA120220017	24-04-2022 05:59	Loaded	22-04-2022 17:10	22-04-2022 17:10	POF
INMAA120220006	Approved	TN01SS7777	INMAA120220016	23-04-2022 05:59	Loaded	21-04-2022 14:21	21-04-2022 14:31	POS
INMAA120220005	Approved	Ts27T2727	INMAA120220015	22-04-2022 05:59	Empty	20-04-2022 12:27	20-04-2022 12:36	POS
INMAA120220004	Approved	Ts27T2727	INMAA120220015	22-04-2022 05:59	Loaded	20-04-2022 12:11	20-04-2022 12:14	POS

Step 14: Click on 🔍 icon to new popup window will display. And can Clear / Search the records with multiple inputs.

Search   **X**

Field	Condition	Value1	Value2	Concatenate Condition
▼	▼	search...		and ▼

⊕ Add Row

Clear   Search

By Clicking on can clear the inputs in the columns. By Clicking on No of Records per page [10 ▼] Drop down can select 10/20/30/40 records to view in List page.

By Clicking on ↻ Load the records and display the data.

13. Business Function Name: Storage Request

13.1   Definition:

Importer /Steamer Agent/Stevedore or any other party provides necessary details and documents and applies for Storage request registration in iPortman® Portal. He has to submit mandatory documents include "Certification of Registration" and "IEC Code". Registration No is issued by "Ministry of company Affairs" in support of Registration of the Company. IEC Code is issued by "Director General of Foreign Trade". Concerned Authority from Port verifies the provided details of the company and provide registration to the Importer /Exporter/Steamer Agent/Stevedore or any other party in iPortman® Application. Importer /Exporter/Steamer Agent/Stevedore or any other party can apply Plot request for Fresh Allotment, Extension & Plot Handover or Surrender.

13.2   Navigation

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar →Cargo → Request → Storage Request → Click on **Add New**
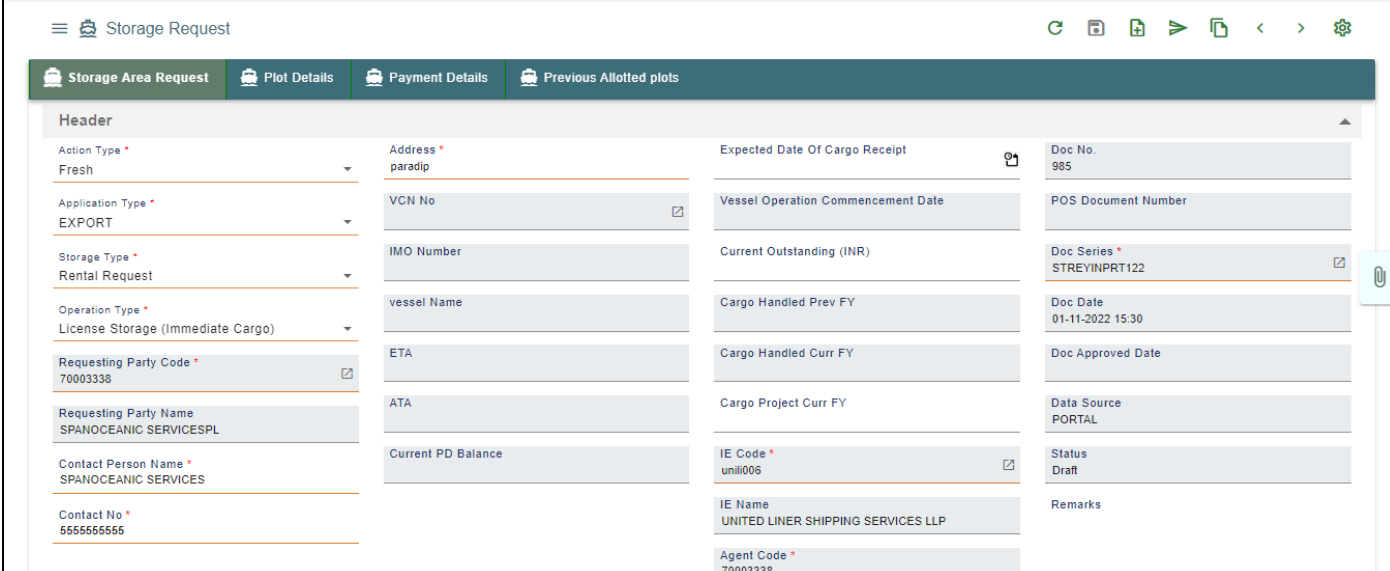
USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

13.3   Prerequisites – Masters

1. IGM

13.4   Screenshot

Step 1: After Navigation to the respective function screen, Click on Add new button . it will direct to the below Storage Request Header screen in order to fill the data

User Interface Image 106–Storage Request Header Details 21.1
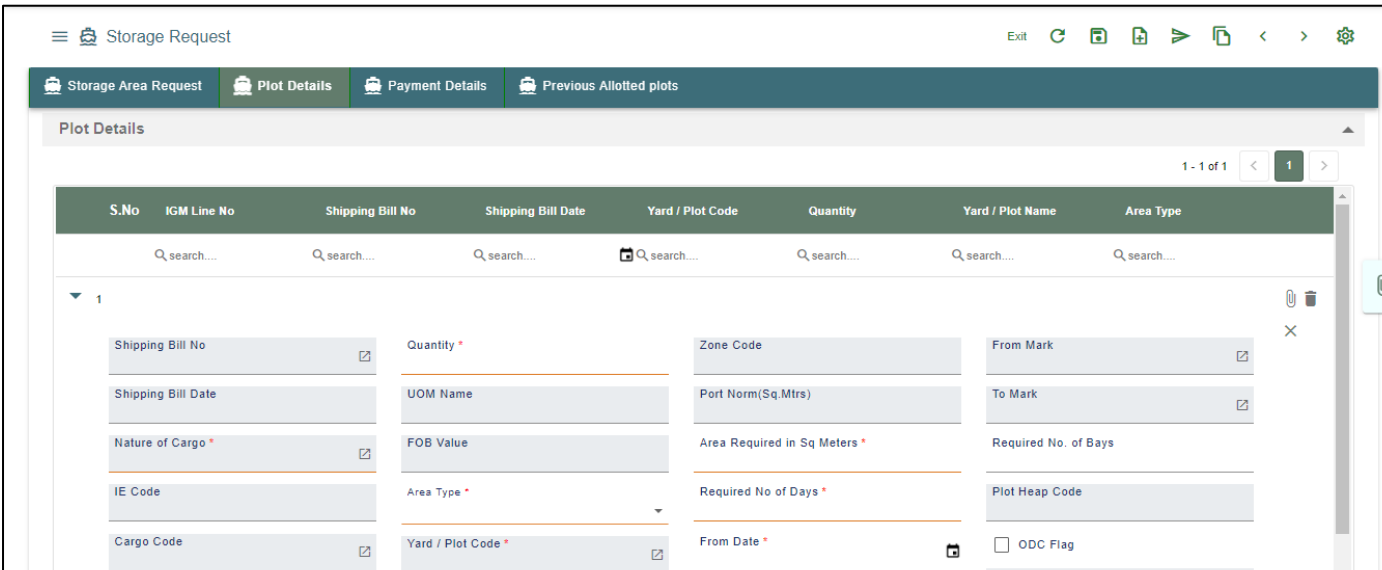
Below are the Field Information regarding Storage Area Request Header Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type

Allotment No.	No	Textbox
Action Type	Yes	Dropdown
Storage Type	Yes	Dropdown
Application Type	Yes	Dropdown
Agent Type Name	Yes	LOV
Requesting Party Code	Yes	LOV
Requesting Party Name	No	Textbox
Contact Person Name	Yes	Textbox
Contact No	Yes	Textbox
Address	No	Textbox
VCN No.	No	LOV
IMO No.	No	Textbox
Vessel Name	No	Textbox
ETA	No	Textbox
ATA	No	Textbox
IE Code	Yes	LOV
Registration No.	No	Textbox
IGM No	No	LOV
Expected Date Of Cargo Dispatch	No	Calendar
Mode Of Dispatch Name	Yes	LOV
Current Outstanding	Yes	Textbox
Cargo Handled Prev FY	Yes	Textbox
Cargo Handled Curr FY	Yes	Textbox
Cargo Project Curr FY	Yes	Textbox

Once all mandatory fields are filled then click on NEXT button then redirected to Plot Details section

Below are the Field Information regarding Plot Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Field Val
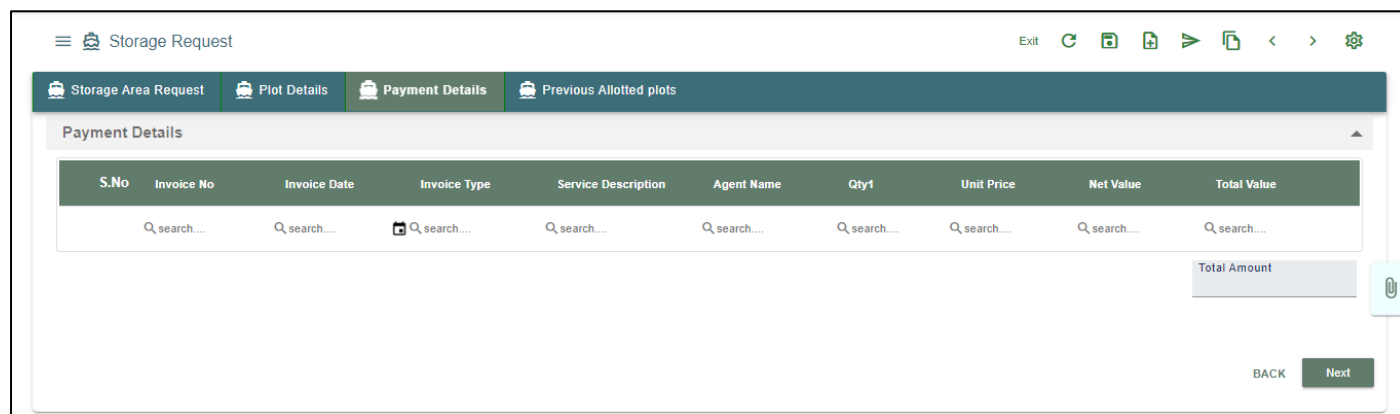
IGM Line No	No	Textbox
Sub Line No	No	Textbox
Area Type	No	Dropdown
Yard/Plot Code	No	LOV
Yard/Plot Name	No	Textbox
Renewal Plot Type	No	LOV
Renewal Plot Name	No	LOV
Extension Plot Type	No	LOV
Extension Plot Name	No	LOV
Handover Plot Type	Yes	LOV
Nature of Cargo	Yes	LOV
Quantity	No	Textbox
Block	No	Textbox
Plot Name From	Yes	LOV
Plot Name To	Yes	LOV
Renewal Area	No	Textbox
Renewal No. of Days	No	Textbox
Extension Area	No	Textbox
Extension No of Days	No	Textbox
Handover Plot Name	No	LOV
Expected Tonnage	No	Textbox
Plot Heap Code	No	Textbox
ODC Flag	No	Checkbox
UOM Name	No	LOV
Cargo Code	No	Textbox
Cargo Name	No	Textbox
Area Required	No	Textbox
Required No of Days	No	Textbox
From Date	No	Calendar
Renewal From Date	No	Calendar
Renewal To Date	No	Calendar
Extension From Date	No	Calendar
Extension To Date	No	Calendar
Handover Area	No	Textbox
Handover From Mark	No	Textbox
No of Packages	No	Textbox
Type of Package	No	Textbox
To Date	No	Textbox
From Mark	No	Textbox
To Mark	No	Textbox
Required No of Bays	No	Textbox
Renewal From Mark	No	Textbox
Renewal To Mark	No	Textbox
Renewal No of Bays	No	Textbox
Extension From Mark	No	Textbox
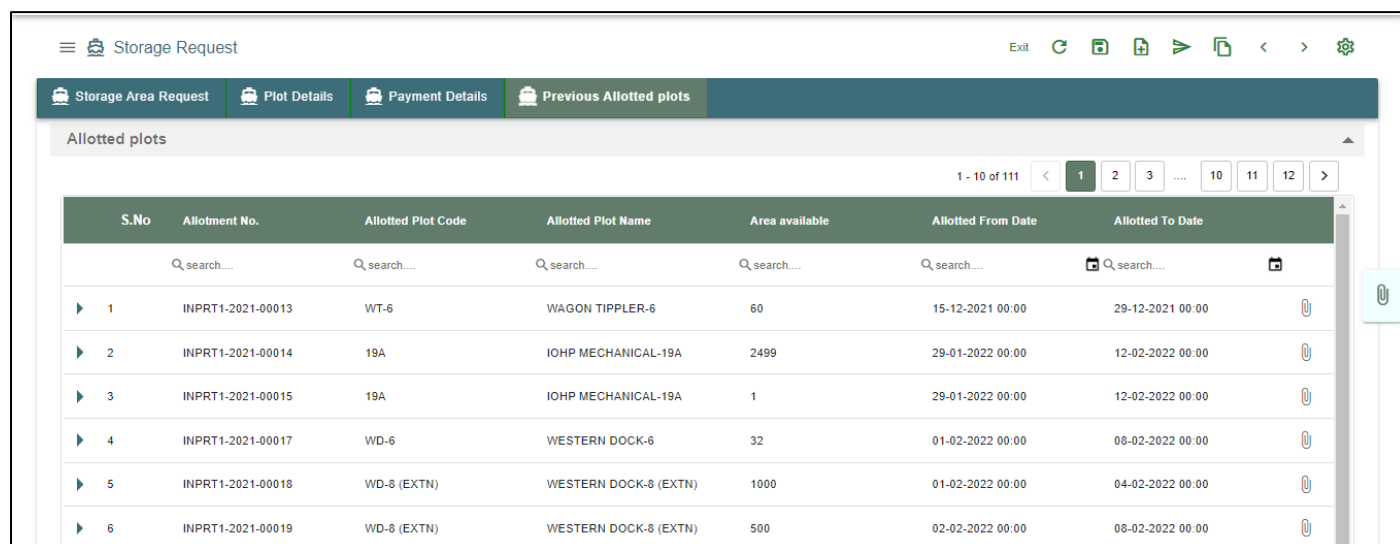
Extension To Mark	No	Textbox
Extension No of Bays	No	Textbox
Handover To Mark	No	Textbox
Handover No of Bays	No	Textbox

Once Plot details Section Details are Filled and Click on Save Button , Click on NEXT button .It will redirected to Payment Details Section

Once Plot details Section Details are Filled and Click on Save Button , Click on NEXT button .It will redirected to Previous Allotted Plot Details Section

Step 2(a): Adding the files manually once the record got saved, Click on the icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload ⬆** button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using 📎 icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on 📎 icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Attachments (2)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

Now Click on the Check boxes accordingly, then Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (2)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☑	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☑	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

Once all the mandatory and required fields are filled then Click on Upload ⬆ button. System will display

the status **File uploaded** on the screen.

Click On Close Button

Click on the Save button from the top right corner to save Form. Once the record got saved successfully, then the system will display message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on the icon. System will be display

 with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

 with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the icon shown. After clicking the icon

system will display with below alert ok and Back

Alert Message

ⓘ Do you want to cancel?

NO   YES

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

Cancellation

Reason Description

Remarks

Requested By

Exit   Proceed

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display Ok and status will change to CANCEL

By Clicking on ⟳ we can view the status of the record

Data Submit Status

Portal Integration

Status: SUCCESS

End Point Code	Status	Response
IPAPRJCTSTOREQPRTLCHPTOB	SUCCESS	record saved successfully id = 12121
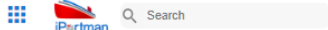
Pos Integration

Status: SUCCESS

End Point Code	Status	Response
IPAPRJCTSTOREQSAP	SUCCESS	{"PortCode":"INMAA1","DocumentNo":"STRETP~INMAA120220048","Message":"Data Received Sucessfully","Status":"Sucess"}

Step 12: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

Step 13: Click on 🖺 icon to new popup window will display. And can Clear / Search the records with multiple inputs.

By Clicking on ⎁ can clear the inputs in the columns. By Clicking on No of Records per page 10 ⌄ Drop down can select 10/20/30/40 records to view in List page.

By Clicking on ↻ Load the records and display the data.

14. Business Function Name: Storage Allotment

14.1   Definition:

 Upon request of Storage Request from Importer /Steamer Agent/Stevedore or any other party provides necessary details and documents with Storage request registration in iPortman® Portal. Considering the storage request port officials will confirm the storage Allotment based on availability.

14.2   Navigation

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar →Cargo → Recordings→ Storage Allotment → Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME
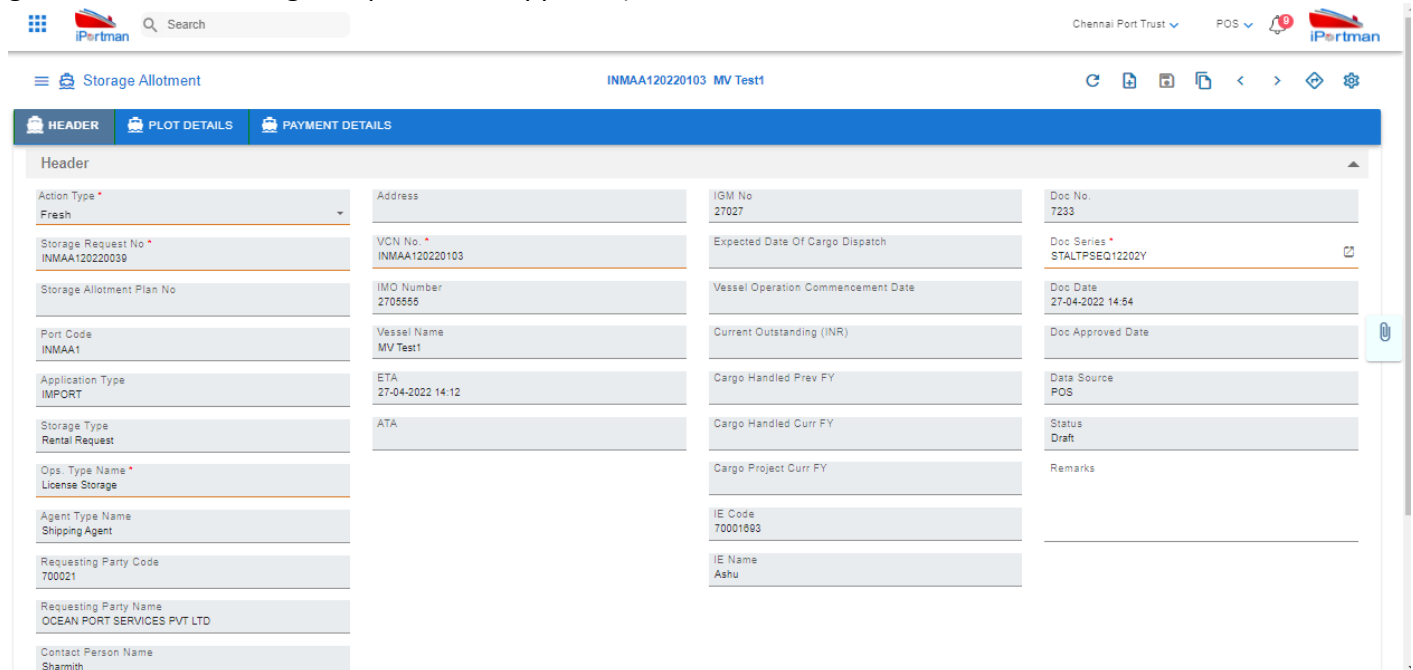
14.3 Prerequisites – Masters

1. Storage Request

14.4 Screenshot
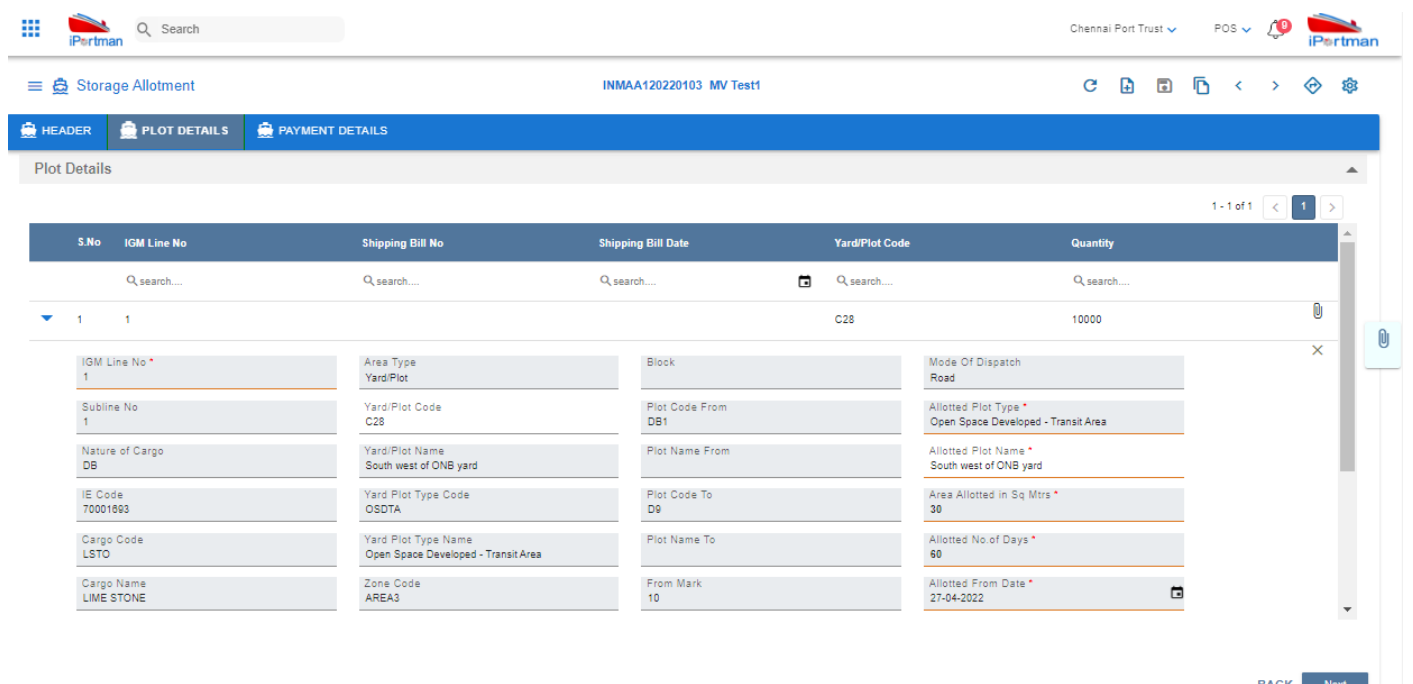
Step 1: After Navigation to the respective function screen, Select Draft Record from list page(Draft record generated after storage request from approval). it will direct to the below screen in order to fill the data

User Interface Image 109 – Storage Allotment Header Details 22.1

Once all Mandatory fields are filled then click on save button then click on next buttonthen the user will be redirected to the popup window as below

Click on NEXT Button and It Will Redirected to Payment Details

Step 2(a): Adding the files manually once the record got saved, Click on the [attachment icon] icon. Then the user will be redirected to the popup window as below –

Click on [+ Add files] button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [attachment icon] icon system will display respective section name.

Attachments (1) ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Custom Related Document	CUST DOC				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

If the Attachment's are configured, System will display like below when we click on 📎 icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Attachments (2) ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

Now Click on the Check boxes accordingly, then Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display the status [File uploaded] on the screen.
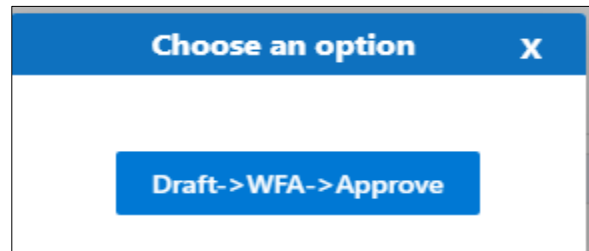

Click On Close Button

Click on the Save button 🖫 from the top right corner to save Form. Once the record got saved successfully, then the system will display [✓ Record saved] message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on the icon. System will be display

 with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

 with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the ⬛Successfully Status changed to APPROVED following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. ⬛Successfully rejected. And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon system will display ⬛Confirmation required with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display ⬛Ok and status will change to

CANCEL

By Clicking on we can view the status of the record

Step 12: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

Step 13: Click on icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

By Clicking on 　　can clear the inputs in the columns. By Clicking on No of Records per page 　10　 Drop down can select 10/20/30/40 records to view in List page.

By Clicking on 　　Load the records and display the data.

14.5   Field information

Field Name	Mandatory	Fill Type
Action Type	Yes	Dropdown
Storage Request No	Yes	LOV
Port Code	No	Textbox
Storage Type	No	Textbox
Application Type	No	Textbox
Requesting Party Name	No	Textbox
Contact Person Name	No	Textbox
Contact No	No	Textbox
Address	No	Textbox
VCN No.	No	Textbox
IMO No.	No	Textbox
Vessel Name	No	Textbox
ETA	No	Textbox
ATA	No	Textbox
IE Code	No	Textbox
Registration No.	No	Textbox
IGM No	No	Textbox
Mode Of Dispatch Name	Yes	Textbox
Expected Date Of Cargo Dispatch	No	Textbox
Current Outstanding	No	Textbox
Cargo Handled Prev FY	No	Textbox
Cargo Handled Curr FY	No	Textbox
Cargo Project Curr FY	No	Textbox
IGM Line No	No	Textbox
Sub Line No	No	Textbox
Cargo Code	No	Textbox
Cargo Name	No	Textbox
Nature of Cargo	No	Textbox
UOM Name	No	Textbox
Renewal Plot Type	No	Textbox
Renewal Plot Name	No	Textbox

Extension Plot Type	No	Textbox
Extension Plot Name	No	Textbox
Area Type	No	Textbox
Yard/Plot Code	No	LOV
Yard/Plot Name	No	Textbox
Plot Name From	No	Textbox
Plot Name To	No	Textbox
No of Packages	No	Textbox
Type of Packages	No	Textbox
Quantity	No	Textbox
Renewal Area	No	Textbox
From Date	No	Textbox
To Date	No	Textbox
From Mark	No	Textbox
To Mark	No	Textbox
Expected Tonnage(MT)	No	Textbox
Required No. of Bays	No	Textbox
Renewal No. of Days	No	Textbox
Renewal From Date	No	Textbox
Renewal To Date	No	Textbox
Handover Plot Type	No	Textbox
Handover Plot Name	No	Textbox
Handover Area	No	Textbox
Extension Area	No	Textbox
Extension No of Days	No	Textbox
Extension From Date	No	Textbox
Extension To Date	No	Textbox
Allotted Plot Type	Yes	LOV
Renewal From Mark	No	Textbox
Renewal To Mark	No	Textbox
Renewal No.of Bays	No	Textbox
Extension From Mark	No	Textbox
Extension To Mark	No	Textbox
Extension No.of Bays	No	Textbox
Area Required	No	Textbox
Required No of Days	No	Textbox
Handover From Mark	No	Textbox

Handover To Mark	No	Textbox
Handover No.of Bays	No	Textbox
Remaining Area	No	Textbox
Allotted Plot Name	Yes	Textbox
Area Allotted	Yes	Textbox
Allotted No.of Days	Yes	Textbox
Allotted From Date	Yes	Calendar
Allotted To Date	Yes	Textbox
Allotted From Mark	No	Textbox
Allotted To Mark	No	Textbox
Allotted No.of Bays	No	Textbox
Plot Heap Code	No	Textbox

15. Business Function Name: Packaging Request

15.1   Definition:

This function is majorly used for conversion of Bulk/Break Bulk cargo into packages cargo and vice versa against the custom permissions of such conversion.

15.2   Navigation

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar→Cargo →Requests → Packaging Request → Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

15.3   Prerequisites – Masters
     1. IGM

15.4   Screenshot

Step 1: After Navigation to the respective function screen, Click on Add new button 🔳 . it will direct to the below screen in order to fill the data

*User Interface Image 112–Packaging Request Header Details 23.1*

Step 2: Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on

save button 💾 and proceed to click on **Next** button for Packaging Lines Screen.

Step 3(a): And Press Load Data ⬚ button then user will see popup window as below

Step 3(b): Click on Import Records button   then select multiple Line no's and click on [OK] button. Packaging Lines will auto populate as follows.

User Interface Image 113–Packing Request Packaging Lines 23.2

Step 4: Once data is filled in Packaging Details, click on save button   and click on [Add Row] if need to add multiple Row's or else click on   button to save the record, And On-screen notification will be LOV as [Record saved]

Step 5(a): Adding the files manually once the record got saved, Click on the   icon. Then the user will be redirected to the popup window as below –

Click on [+ Add files] button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [📎] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [📎] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Now Click on the Check boxes accordingly, then Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on Upload button. System will display the status **File uploaded** on the screen.

Click On Close Button

Click on the Save button ⬚ from the top right corner to save Form. Once the record got saved successfully, then the system will display ✔ **Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ⬨ .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on ⬨ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

 with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the icon shown. After clicking the icon

system will display with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

Step 16: Click on 🔍 icon to new popup window will display. And can Clear / Search the records with multiple inputs.

By Clicking on can clear the inputs in the columns. By Clicking on No of Records per page Drop down can select 10/20/30/40 records to view in List page.

By Clicking on Load the records and display the data.

15.5   Field information

Field Name	Mandatory	Fill Type
Application Type	Yes	Dropdown
Packaging Type	Yes	Dropdown
Document Type	Yes	Dropdown
Document No	Yes	LOV
VCN No	Yes	LOV
Vessel Name	No	Textbox
IMO No.	Yes	Textbox
Importer Code	Yes	LOV
Importer Name	No	Textbox
IE Code	Yes	Textbox
Bagging Permission No.	Yes	Textbox
Bagging Permission Date	Yes	Calendar
Bagging Permission Qty	Yes	Textbox
Labour Required (Port/Private)	Yes	Dropdown
No. of Labour Required - Port	No	Textbox
Equipment Required (Y/N)	Yes	Dropdown
IGM Line No	Yes	Textbox
IGM Sub Line No	Yes	Textbox
Nature of Cargo	Yes	Textbox
No. of Packages	No	Textbox
Gross Weight	Yes	Textbox

Unit of Weight Code	Yes	Textbox
Gross Volume	No	Textbox
Unit of Volume Code	No	Textbox
Marks and Numbers	Conditional	Textbox

16. Business Function Name: Packaging Recording

16.1   Definition:

This function is majorly used for conversion of bulk cargo into packages cargo and vice versa.

16.2   Navigation

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⁘ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar→ Cargo →Recordings → Packing Recording → Click on **Add New**
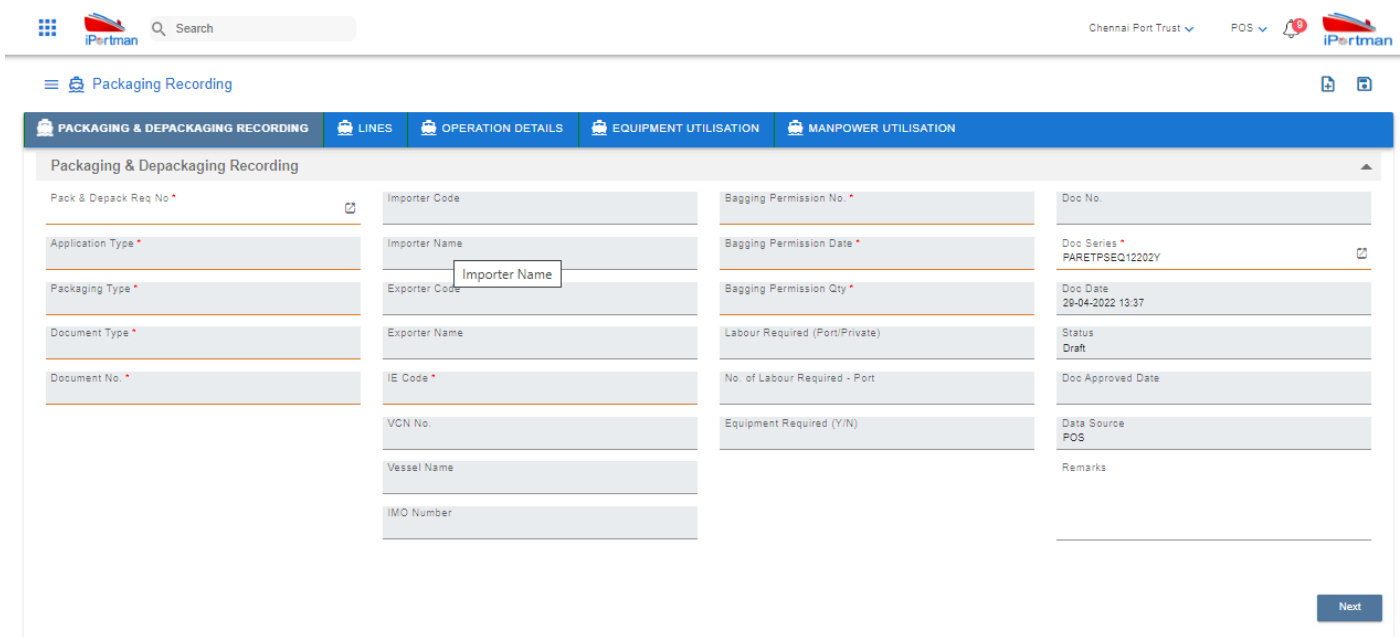
USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

16.3   Prerequisites – Masters

1. Packaging Recording

16.4   Screenshot

Step 1: After Navigation to the respective function screen, Click on Add new button . it will direct to the below screen in order to fill the data

User Interface Image 116 – Packing Recording Header Details24.1

Step 2: Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on

save button 📁 and proceed to click on **Next** button for Lines as shown in below screen.

User Interface Image 117 – Packing Recording Lines 24.2
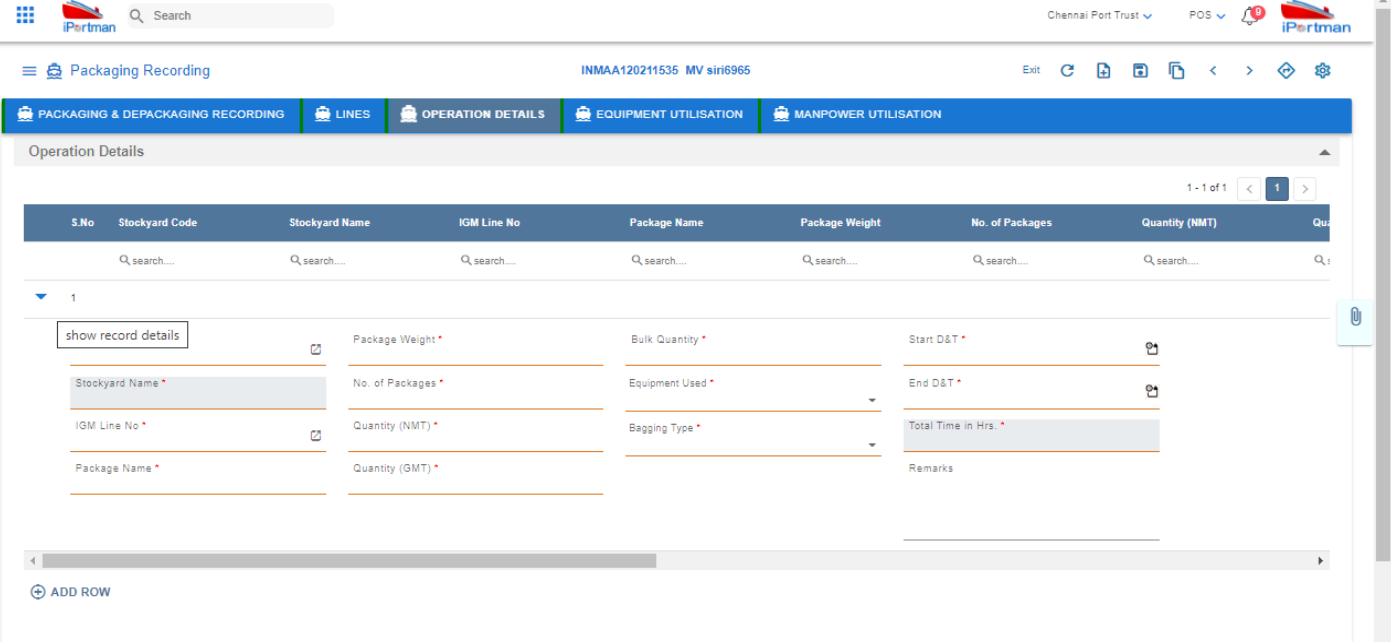
Step 3: Once data is filled in Packaging Lines, click on save button 📂 to save the record, And On-screen

notification will be LOV as ✅ **Record saved**

Step 4: Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on save button [icon] and proceed to click on **Next** button for Operation Details as shown in below screen.
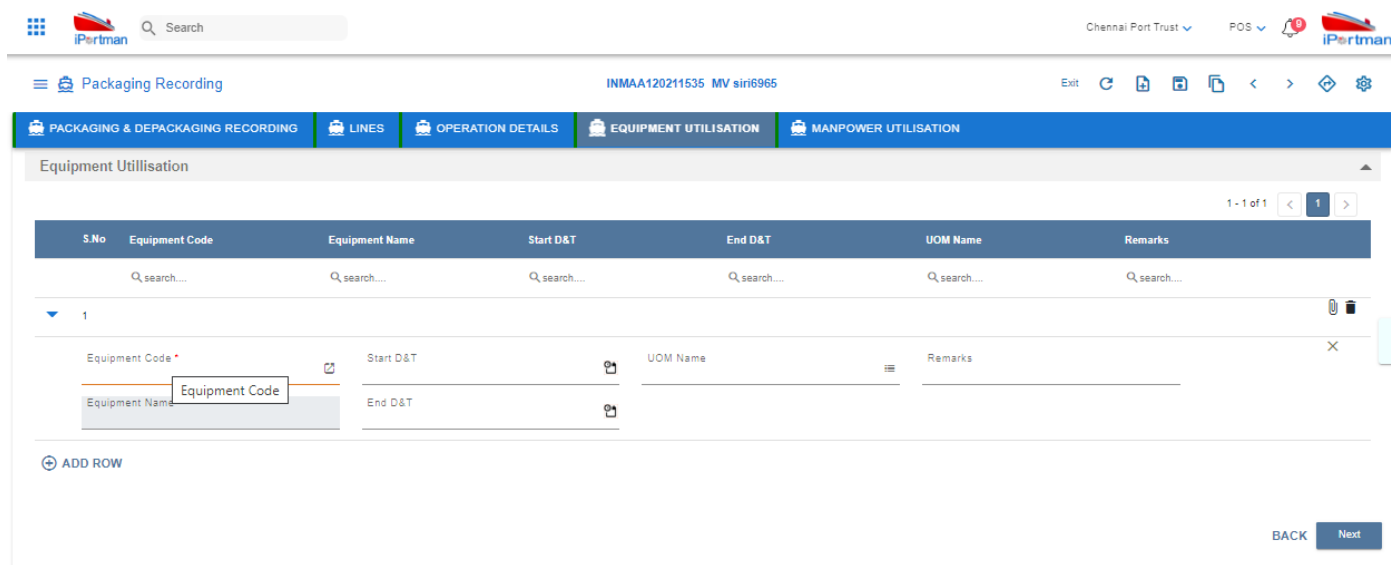
User Interface Image 118 – Packing Recording Operation Details 24.3

Step 5: Once data is filled in Operation Details, click on save button [icon] to save the record, And On-screen notification will be LOV as **Record saved**

Step 6: Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on save button [icon] and proceed to click on **Next** button for Equipment Utilization as shown in below screen. And Press **Add Row** to enter the data

User Interface Image 119– Packaging Recording Equipment Utilization 24.4

Step 7: Once data is filled in Equipment Utilization, click on save button [icon] and click on [Add Row] if need to add multiple Row's or else click on [icon] button to save the record, And On-screen notification will be LOV as [Record saved]

Step 8: Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on save button [icon] and proceed to click on [Next] button for Manpower Utilization as shown in below screen. And Press [Add Row] to enter the data

User Interface Image 120 – Packaging Recording Manpower Utilization 24.5

Step 9: Once data is filled in Manpower Utilization, click on save button [icon] and click on [+ Add Row] if need to add multiple Row's or else click on [icon] button to save the record, And On-screen notification will be LOV as [Record saved]

Step 10(a): Adding the files manually once the record got saved, Click on the [icon] icon. Then the user will be redirected to the popup window as below –

Click on [+ Add files] button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Now Click on the Check boxes accordingly, then Select files button will be enable.

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Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display the status [File uploaded] on the screen.

Click On Close Button

Click on the Save button ⬚ from the top right corner to save Form. Once the record got saved successfully, then the system will

display **✔ Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◈ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on ◈ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on ◈ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon system will display **Confirmation required** with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to

CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

Step 21: Click on 🔍 icon to new popup window will display. And can Clear / Search the records with multiple inputs.

By Clicking on 🔧 can clear the inputs in the columns. By Clicking on No of Records per page 10 ∨ Drop down can select 10/20/30/40 records to view in List page.

By Clicking on 🔄 Load the records and display the data.

16.5   Field information

Field Name	Mandatory	Fill Type
Packaging Request No	Yes	LOV
Application Type	Yes	Textbox
Packaging Type	Yes	Textbox
Document Type	Yes	Textbox
Document No.	Yes	Textbox
Importer Code	Yes	Textbox
Importer Name	No	Textbox

IE Code	Yes	Textbox
VCN No.	Yes	Textbox
Vessel Name	No	Textbox
IMO No.	No	Textbox
Bagging Permission No.	Yes	Textbox
Bagging Permission Date	Yes	Textbox
Bagging Permission Qty	Yes	Textbox
Labour Required (Port/Private)	Yes	Textbox
No. of Labour Required - Port	Yes	Textbox
Equipment Required (Y/N)	Yes	Textbox
IGM Line No	No	Textbox
IGM Sub Line No	No	Textbox
Nature of Cargo	No	Textbox
No. of Packages	No	Textbox
Gross Weight	No	Textbox
Unit of Weight Code	No	Textbox
Gross Volume	No	Textbox
Unit of Volume Code	No	Textbox
Marks and Numbers	No	Textbox
Stockyard Code	Yes	LOV
Stockyard Name	Yes	Textbox
IGM Line No	No	LOV
Package Name	Yes	Textbox
Package Weight	Yes	Textbox
No. of Packages	Yes	Textbox
Quantity (NMT)	Yes	Textbox
Quantity (GMT)	Yes	Textbox
Bulk Quantity	Yes	Textbox
Equipment Used	Yes	Dropdown
Bagging Type	Yes	Dropdown
Start D&T	Yes	Calendar
End D&T	Yes	Calendar
Total Time in Hrs.	Yes	Textbox
Remarks	No	Textbox
Equipment Code	Yes	LOV
Equipment Name	No	Textbox

Start D&T	No	Textbox
End D&T	No	Textbox
UOM Name	No	LOV
Remarks	No	Textbox
Employee Code	Yes	LOV
Employee Name	No	Textbox
Employee Type Name	Yes	LOV
Start D&T	No	Calendar
End D&T	No	Calendar
Over Time	No	Dropdown

17. BUSINESS FUNCTION NAME: AGENT NOMINATION

17.1   DEFINITION:

User will Nominate Importer, Exporter, CHA, Stevedore through iPortman Portal for handling the cargo.

17.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⠿ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo → Others → Agent Nomination→ Click on New button

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.
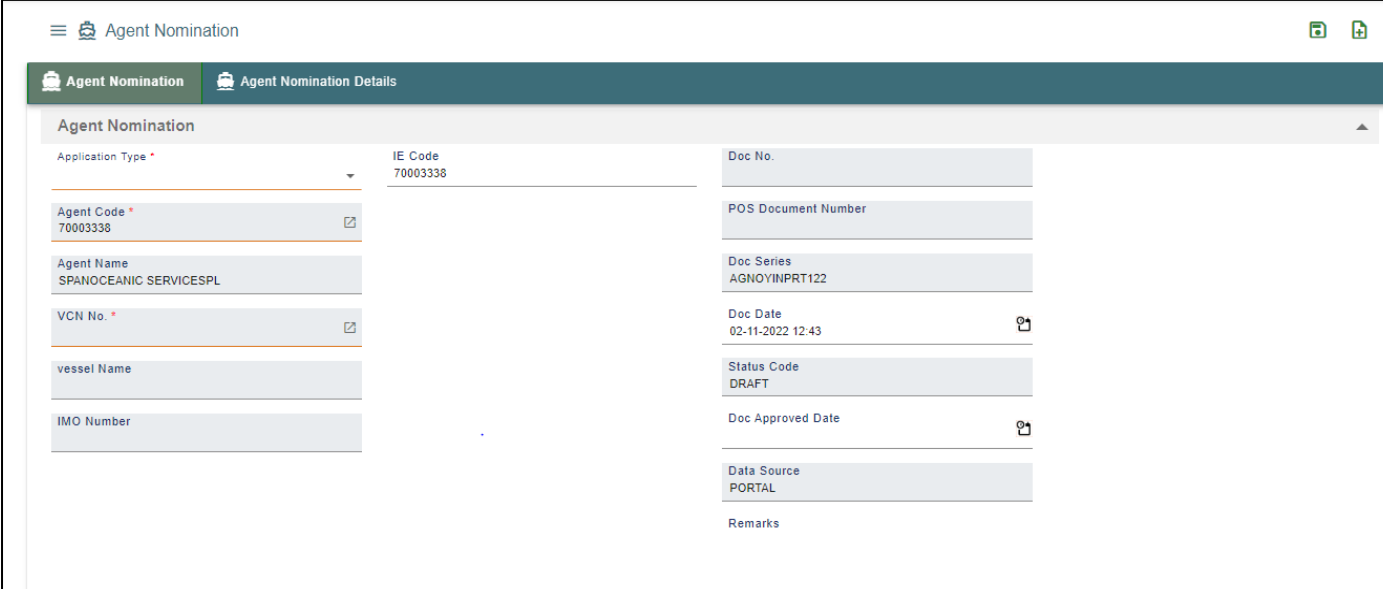
17.3   PREREQUISITES – MASTERS
1. Agent Master

17.4   SCREENSHOT
Following Screenshots are from Agent Nomination

Step 1: After Navigation to the respective function screen, User will move to list of Data and Click on Add new button . it will direct to the below screen to fill the data
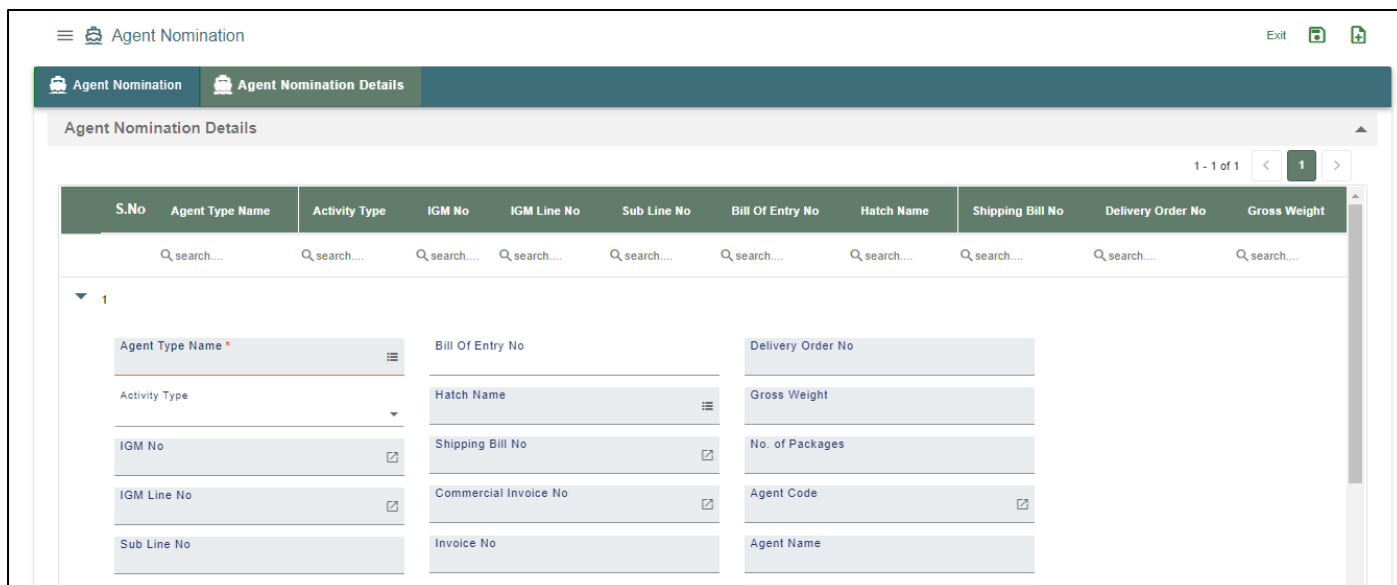
User Interface Image 234-Agent Nomination-35.5.1

Below are the Field Information regarding **Agent Nomination Header** Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Application Type	Yes	Drop down
Cargo Status	Yes	Drop down
Agent type Code	Yes	Popup
Agent Code	Yes	Popup
Agent Name	No	Not Applicable
IE Code	No	TextBox
From Date	Yes	TextBox
To Date	Yes	TextBox
Line MLO Code	No	LOV

Step 2: Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on save button and proceed to click on **Next** button for Agent Nomination Details. And Press **Add Row** to enter the data.
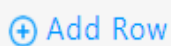
User Interface Image 235-Agent Nomination-35.5.2

Below are the Field Information regarding **Agent Nomination** Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Agent type Code	Yes	Popup
Activity Type	Yes	Drop down
IGM No	Yes	Popup
IGM Line No	Yes	Popup
IE Code	Yes	Popup
Shipping Bill No*	Yes	Popup
Commercial Invoice No	Yes	Popup
Invoice No	No	TextBox
Batch No	No	TextBox
Agent Code	Yes	Popup
Bill to Party Code	Yes	Popup
Shed/Yard Location	No	Popup

Step 3: Once data is filled in Agent Nomination Details, click on save button **and click on** **if need to add multiple Row's or else click on** **button, And document will be saved with 'Draft' status with on screen LOV as below**

Step 4: button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [📎] icon system will display respective section name.

Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name		Valid From Date	Valid To Date	File Name	Clear
Agent Nomination								
☐	1.		Agent Nomination Letter 1	⌄				*File Req

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

If the Attachment's are configured, System will display like below when we click on [📎] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

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Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Agent Nomination							
☐	1.		Agent Nomination Letter 1 ⌄				*File Req

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Agent Nomination							
☐	1.		Agent Nomination Letter 1 ⌄				*File Req

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display the status [File uploaded] on the screen.

Click On Close Button

Click on the Save button ⊡ from the top right corner to save Form. Once the record got saved successfully, then the system will display [✓ Record saved] message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◇ .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on ◇ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   Reject

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following ⎯⎯⎯⎯⎯⎯⎯⎯⎯⎯⎯⎯ status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. Successfully rejected. And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on ⬦ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   Reject

Successfully Status changed to APPROVED

Step11: Once the user Approve the request the ⎯⎯⎯⎯⎯⎯⎯⎯⎯⎯⎯⎯ following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. Successfully rejected. And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon

system will display Confirmation required with below alert ok and Back

Alert Message

Do you want to cancel?

NO   YES

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

Cancellation

Reason Description

Remarks

Requested By

Exit   Proceed

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to CANCEL

By Clicking on **we can view the status of the record**

Data Submit Status   X

Portal Integration

Status: SUCCESS

End Point Code	Status	Response
IPAPRJCTAGNOTPPRTLCHPTOB	SUCCESS	record saved successfully id = 2766

List Data:

Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 237-Agent Nomination (List Data)-35.5.4

18. BUSINESS FUNCTION NAME: AGENT NOMINATION APPROVAL

18.1 DEFINITION:

If an Agent Nominate other agent for Particular Role that that agent needs to accept for Particular role by approve by this Function in iPortman Portal.

18.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Common Functions→ Recording→ Agent Nomination Approval→ Click on New button 🔳

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

18.3   PREREQUISITES – MASTERS

1. Agent Type

18.4   SCREENSHOT

Following are Screenshots from Agent Nomination Approval.

Step 1-Click on New button 🔳 . The user shall redirect to the screen like below-.

User Interface Image 307-Agent Nomination Approval 38.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Step 3: Click on the Save button 🔳 from the top right corner to save the Form. Once the record got saved

successfully, then the system will display ✅ **Record saved** message.

Step 4: After saving the record click on the 📎 icon. Then the user will be redirected to the Attachments Window. –

User Interface Image 14-Agent Nomination Approval 38.5.2

Step 5: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through **Upload ⬆** button and can download the attached document by clicking on the file name attached.

User Interface Image 308- Agent Nomination Approval 38.5.3

Step 6: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through **Upload ⬆** button and can download the attached document by clicking on the file name attached.

Step 7: Configure Check List in Check List Form for respective forms. Then Click on ☰ icon. Configured

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parameters will display in the Check List Window.

Check List

Parameter Code	Parameter Name	Yes/No	REMARKS
FRESH WATER	Fresh Water	☐	

Step 8: Click on Save, System will display the ✓ checklist saved X status on the screen.

Step 9: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option   X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step10: Once the workflow is initiated click on the icon. System will be display Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval   ×

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to WFAPP

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'.
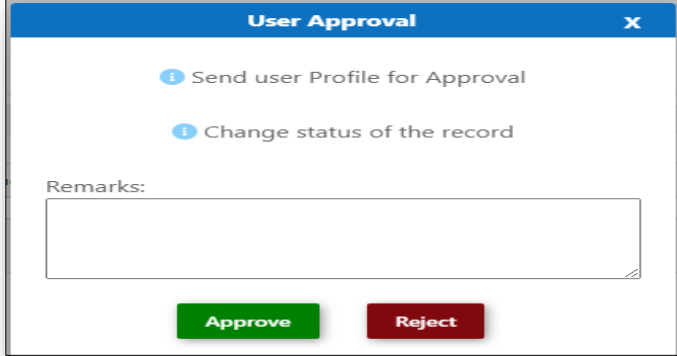
180

If user reject the request following alert will display on the screen. **Remarks required!** .Up On Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step12: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE REJECT

Step13: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **Remarks required!** .Up On Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 14: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

Doc No.	Status	License No.	Boat / Craft Type Name	Length (M)	Breadth (M)	Depth (m)	↑	Registered Tonnage (MT)	Delivery D&T	Year of Built	Re
search...	search...	search...	search...	search...	search...	search...		search...	search...	search...	

User Interface Image 309-Request Re-Measurement/Survey Request of Boat/ Craft/ IWT 38.5.4

Step 15: Click on 📄 icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

Search

Field	Condition	Value1	Value2	Concatenate Condition
⌄	⌄	search....	search....	and ⌄

⊕ Add Row

Clear ✖   Search 🔍

By Clicking on ▽ can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

19. BUSINESS FUNCTION NAME: AGENT NOMINATION APPROVAL BILL TO PARTY

19.1 DEFINITION:

If an Agent Nominate other agent for Particular Role that agent needs to accept for Particular role also need accept for the Biil to Party for approval of by this Function in iPortman Portal.

19.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⠿ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Common Functions→ Recording→ Agent Nomination Approval Bill to Party → Click on New button 🗋

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

19.3 PREREQUISITES – MASTERS
1. Agent Type

19.4 SCREENSHOT
Following Screenshots are from Agent Nomination Approval Bill to Party.

Step 1-Click on New button 🗋 . The user shall redirect to the screen like below-.

User Interface Image 310- Agent Nomination Approval Bill to Party 39.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Step 3: Click on the Save button 🖫 from the top right corner to save the Form. Once the record got saved

successfully, then the system will display ✓ **Record saved** message.

Step 4: After saving the record click on the 📎 icon. Then the user will be redirected to the Attachments Window. –
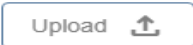
User Interface Image Agent Nomination Approval Bill to Party 311- 39.5.2

Step 5: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through [Upload ⬆] button and can download the attached document by clicking on the file name attached.

Attachments (0)						✕
SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 312- Agent Nomination Approval Bill to Party 39.5.3

Step 6: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through [Upload ⬆] button and can download the attached document by clicking on the file name attached.
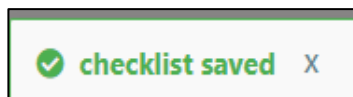
Step 7: Configure Check List in Check List Form for respective forms. Then Click on [≡] icon. Configured parameters will display in the Check List Window.

Check List				💾 **X**
Parameter Code	Parameter Name	Yes/No	REMARKS	
FRESH WATER	Fresh Water	☐		

Step 8: Click on Save, System will display the [✓ checklist saved X] status on the screen.

Step 9: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◇ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step10: Once the workflow is initiated click on the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ×

Send user Profile for Approval

Remarks:

APPROVE REJECT

Successfully Status changed to WFAPP

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. ⓘ **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen Successfully rejected. and the document status will be changed as 'REJECTED'.

Step12: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step13: Once the user Approve the request the Successfully Status changed to APPROVED following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. ❶ **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen Successfully rejected. and the document status will be changed as 'REJECTED'.

Step 14: Once the workflow is in WFAPP. Click on the icon. System will be displaying Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step 15: Once the user Approve the request the Successfully Status changed to APPROVED following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. ❶ **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen Successfully rejected. and the document status will be changed as 'REJECTED'.

Step 16: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

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By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display [Ok] and status will change to CANCEL

Step 17: While if there is any changes or extension we can extend the record by clicking the [icon] icon shown. After clicking the icon system will display **Confirmation required** with below alert Extend and Back buttons

By Clicking on Back we can go to the previous screen. By clicking Extend we can see the below fields in Alert.

Clicking on Close we can go to the previous screen. By clicking Extend system will display [Ok] and status will same as Approved.

Step 18: While if there is any changes or renewal we can renewal the record by clicking the [icon] icon shown. After clicking the icon system will display **Confirmation required** with below alert Renewal and Back buttons

Alert Message X

ⓘ Do you want to Renewal?

[Renewal]   [Back]

By Clicking on Exit we can go to the previous screen. By clicking Renewal we can see the below fields in Alert.

Renewal X

Reason Code*
Reason Description
Requested By
Renewal Date*

[Exit] [Renewal]

Clicking on Close we can go to the previous screen. By clicking Renewal System will display [Ok] and status will same as Approved.

Step 19: Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

Doc No.	Status	License Type	License No.	Location	Contact No	Issue To	License Validity Upto	Registered Under	Val
search...	search...	search...	search...	search...	search...	search...	search...	search...	
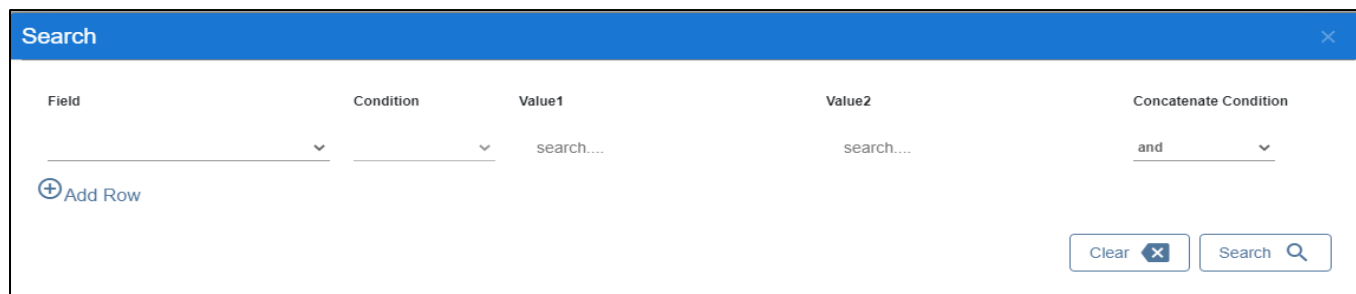
User Interface Image 313-Miscellaneous Registration within port Limits 39.5.4

Step 20: Click on icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

By Clicking on can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

20. Business Function Name: IA/EA Closure

20.1   Definition:

IA/EA Closure Form is a Port document for closing the Area of the particular IGM Line or Shipping Bill to closing Cargo Quantities in iPortman® application.

20.2   Navigation

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar→ Cargo → Yard Operations → IA/EA Closure→ Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

20.3   Prerequisites – Masters

20.3.1 Agent Master

20.3.2 Agent Type Master

Screenshots

Step 1: After Navigation to the respective function screen, Click on Add new button . It will direct to the below screen in order to fill the data.

Case 1: If Application type as IMPORT the below fields are available.

Step 2: Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on save button ⬜ and proceed to click on **Next** button for Equipment Utilized section as shown in below screen. And Press ⊕ **Add Row** to enter the data

User Interface Image 133– IA/EA Closure Equipment Utilization 27.2(a)
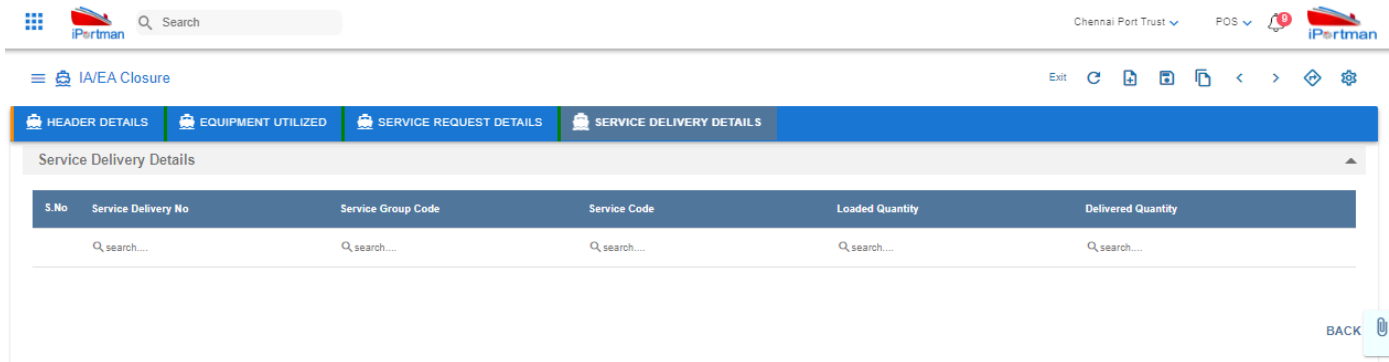
User Interface Image 133– IA/EA Closure Service Request Details 27.2(b)

User Interface Image 133– IA/EA Closure Service Delivery Details 27.2(c)

Step 3: Once data is filled in Agent Details, click on save button and click on ⊕ Add Row if need to add multiple Row's or else click on 🖫 button to save the record, And On-screen notification will be LOV as

✅ **Record saved**

Step 4(a): Adding the files manually once the record got saved, Click on the 📎icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload ⬆** button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using 📎 icon system will display respective section name.

Attachments (1)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Custom Related Document	CUST DOC				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

If the Attachment's are configured, System will display like below when we click on [paperclip] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Attachments (2)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (2) ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
		Shipping Bill					
☑	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☑	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

Once all the mandatory and required fields are filled then Click on Upload ⬆ button. System will display

the status **File uploaded** on the screen.

Attachments (2) ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
		Shipping Bill					
☑	1.	Custom Related Document	Transhipment Permit				*File Required
☐	2.	Cargo Related Documents	International Load Line Certificate				*File Required

+ Add files   Select files

or

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	Certificate Name	Clear
1.	Custom Related	Transhipmen ⬚	🗓	🗓	CHPT--CQA--SDO--BTT.png (224.39 kb)	🗑

Upload ⬆   Close ✕

Click On Close Button

Click on the Save button 🖫 from the top right corner to save Form. Once the record got saved successfully, then the system will

display ✔ **Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on the icon. System will be display

with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the [Successfully Status changed to APPROVED] following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. [Successfully rejected.] And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the [⊗] icon shown. After clicking the icon

system will display [Confirmation required] with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to

CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

Step 15: Click on 🔍 icon to new popup window will display. And can Clear / Search the records with multiple inputs.

By Clicking on 📊 can clear the inputs in the columns. By Clicking on No of Records per page [10 ▼] Drop down can select 10/20/30/40 records to view in List page.

By Clicking on 🔄 Load the records and display the data.

20.4   Field information

Field Name	Mandatory	Fill Type
VCN No	Yes	Popup
Application Type	Yes	Dropdown
Voyage No	No	Text Box
Vessel Name	No	Text Box
IMO No	No	Text Box
IGM No	No	Text Box
IGM Date	No	Text Box
Weight	No	Text Box
Rotation No	No	Text Box
Run Trade	No	Text Box
Line No	Yes	Popup
Subline No	No	Text Box
Import Application No	No	Text Box

No. of Packages	No	Text Box
UOM Name	No	LOV
Cargo Description	No	Text Box
Shipping Bill No	Yes	Popup
IA Closing D&T	No	Date Picker
Area Name	Yes	LOV
Closed By	No	DropDown
Condition	No	DropDown
Received At CDO	No	Text Box
Sent to AC	No	Text Box
Received Record	No	Text Box
Send Refund	No	Text Box
IGM/EGM Received	No	Text Box
RL/EGM Send	No	Text Box
RL Received	No	Text Box
IGM Closing Status	No	DropDown
IGM Closed D&T	No	Text Box
IGM Closing Remarks	No	Text Box

21. BUSINESS FUNCTION NAME: ULLAGE SURVEY

21.1 DEFINITION:

Importer/Exporter / Agent request the surveyor for Ullage Survey. Surveyor measures the depth of free space above the liquid in each tank and then calculates using the vessel stables the volume of the liquid in each tank. Surveyors send this report to Vessel Chief Officer for further validation, upon validation from Chief Officer, Importer/Exporter / Agent submit this survey report to port. Ullage Survey contains information as follows.

21.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar →Cargo→ Cargo Operations →Ullage Survey → Click on New button 🔲

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.
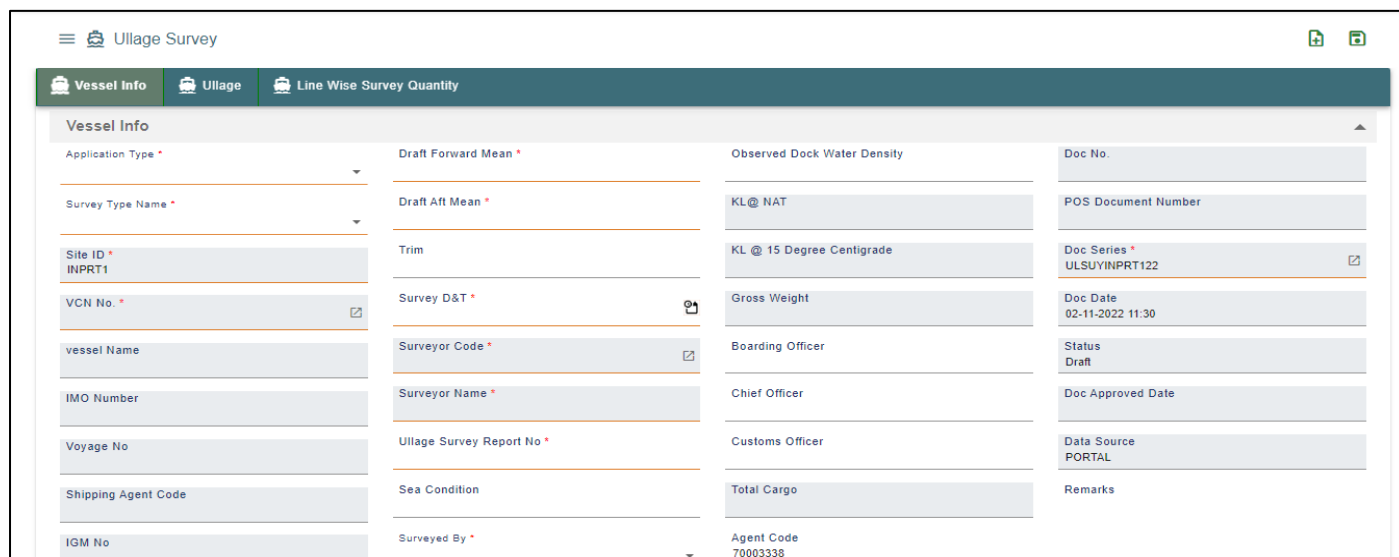
21.3 PREREQUISITES – MASTERS

1. Berth Master
2. Tank Farm
3. Product
4. Survey Type
5. Vessel

21.4   SCREENSHOT

Following Screenshots are from Ullage Survey

Step 1- Click on New button and We will redirect to screen like below.

User Interface Image 65-Ullage Survey (Vessel Info)-10.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Vessel Information Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)
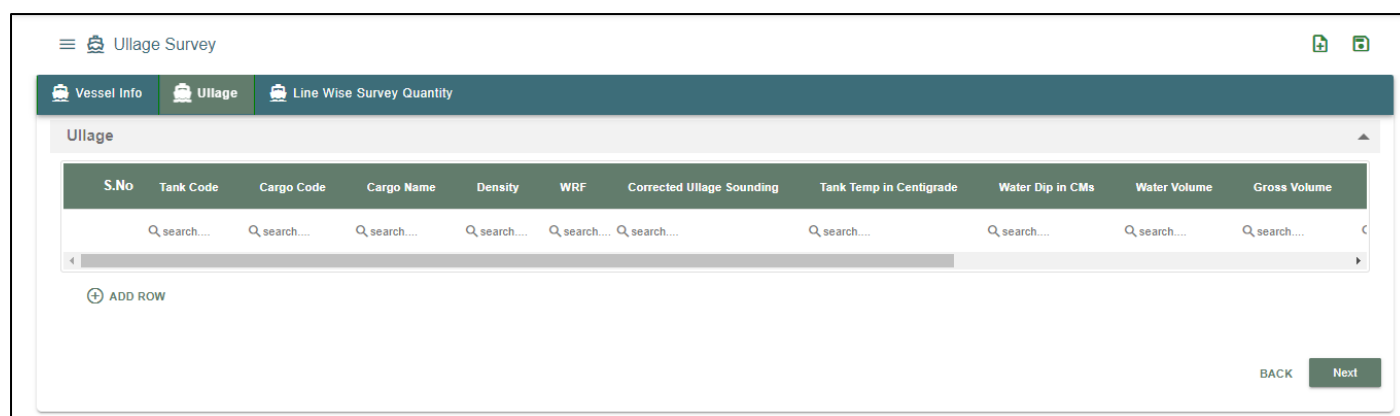
Field	Mandatory	Fill Type
Application Type	yes	Dropdown
Survey Type Name	yes	Dropdown
Site Id	yes	text box
VCN No.	yes	Pop Up
Vessel Name	No	Textbox
IMO No	No	Textbox
Voyage No	No	Textbox
Shipping Agent Code	No	Textbox
Importer Name	No	Textbox
IGM No	No	Textbox
Draft Fwd. Mean	yes	Textbox
Draft AftMean	yes	Textbox
Trim	No	Textbox
Date & Time of Survey	yes	Date Picker
Survey Type	yes	Dropdown
Surveyed By	yes	Dropdown
Surveyor Code	yes	Pop Up

Surveyor Name	yes	Text Box
Ullage Survey Report No	yes	Text Box
Sea Condition	No	Text Box
Observed Dock Water Density	No	Text Box
Total Cargo(Ship's Account)	No	Text Box
KL@ NAT	No	Text Box
KL @ 15 Degree Centigrade	No	Text Box
Gross Weight	No	Text Box
Remarks	No	Text Box
Boarding Officer	No	Text Box
Chief Officer	No	Text Box
Customs Officer	No	Text Box
Total Cargo	No	Text Box

Step 3: Click button from Top Menu Bar to save Vessel info Details form record. Once it is Ullage form will be activated to add Ullage Details.

✔ Record saved
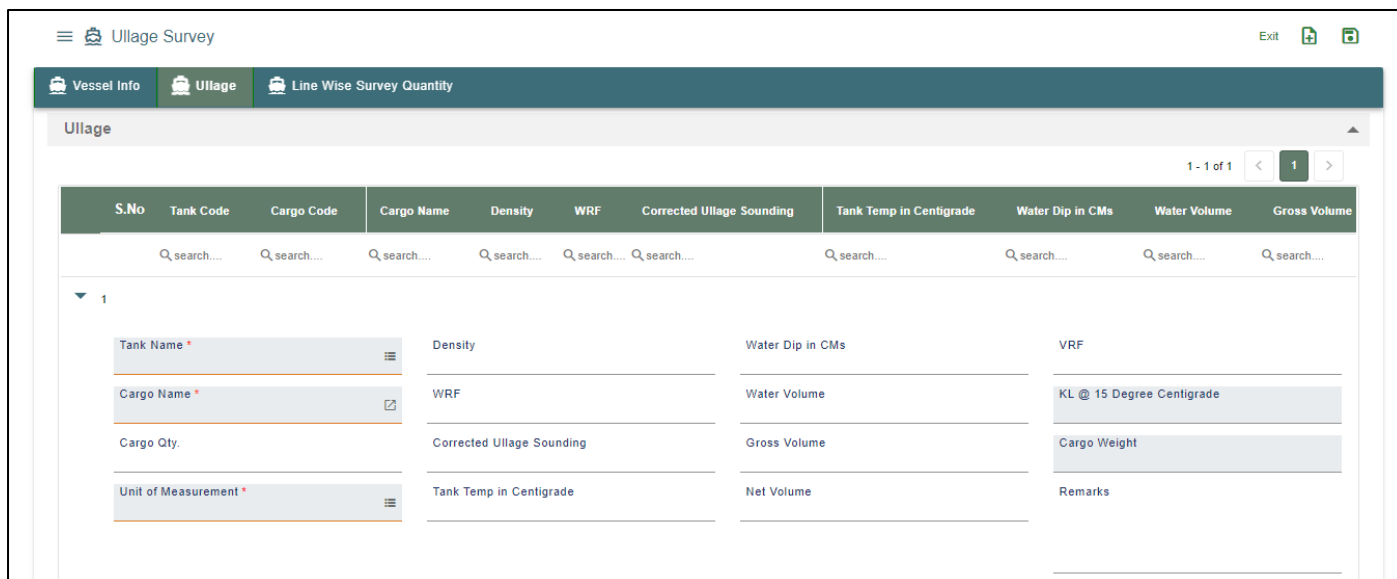
Step 4: Once Vessel Info Details are saved, Ullage form will be activated as below to add Ullage Details as shown in below screen.

User Interface Image 66-Ullage Survey (Ullage)-10.5.2(a)

Click on ⊕ Add Row to begin with data entry
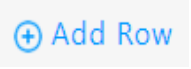
User Interface Image 67-Ullage Survey (Ullage)-10.5.2(b)
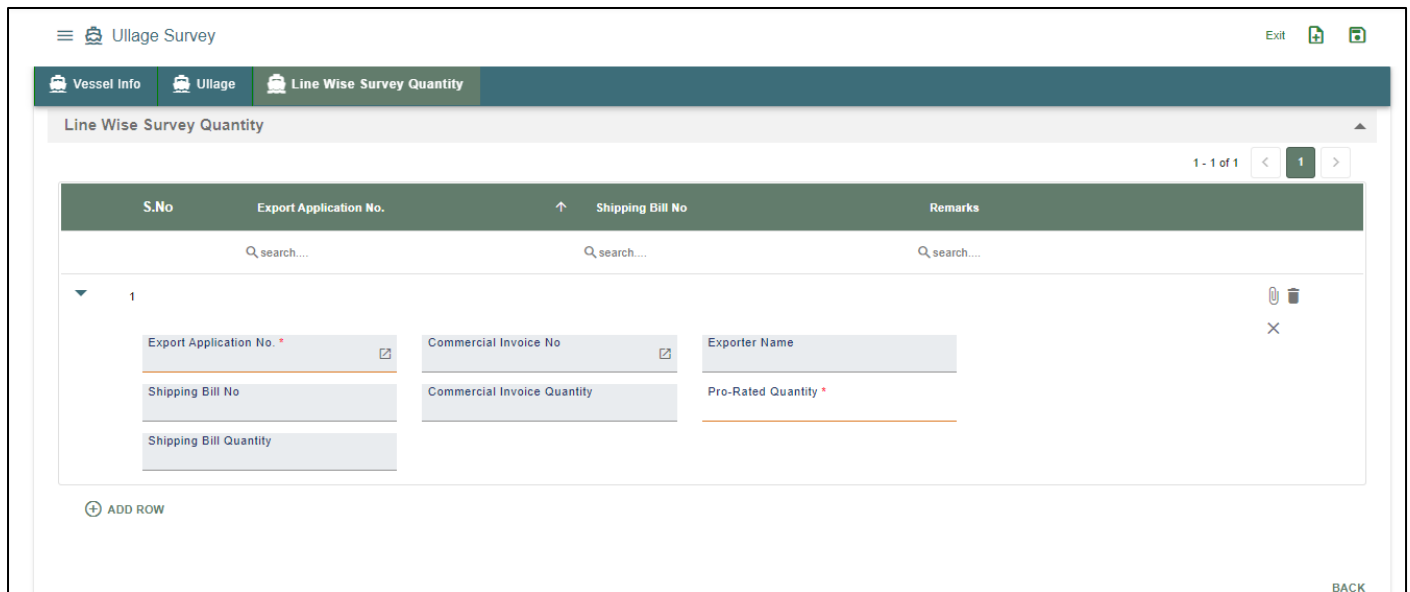
Below are the Field Information regarding Ullage Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Tank Name	yes	Pop Up
Cargo Name	yes	Pop Up
Cargo Quantity	No	Text Box
Unit of Measurement	Yes	Pop Up
Density	No	Text Box
WRF	No	Text Box
Corrected Ullage Soundings	No	Text Box
Tank Temp in Centigrade	No	Text Box
Water Dip in Cms	No	Text Box
Water Volume	No	Text Box
Gross Volume in M3	No	Text Box
Net Volume in M3	No	Text Box
VRF	No	Text Box
KL @ 15 Degree Centigrade	No	Text Box
Cargo Weight	No	Text Box
Remarks	No	Text Box

Step 5: Once data is filled in Ullage Details, click on save button   and click on ⊕ Add Row   if need to add multiple Row's or else click on   button.

Once Ullage Details are saved, Line Wise Survey Quantity will be activated as below to Line Wise Survey Quantity as shown in below screen.

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Adding the files manually once the record got saved, Click on the ⬆ icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload ⬆** button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using 📎 icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on ☐ icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Now Click on the Check boxes accordingly, then ☐ Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name		Valid From Date	Valid To Date	File Name	Clear
Ullage Survey								
☐	1.		Ullage survey report 1	⌄				*File Required

＋ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display the status [**File uploaded**] on the screen.

Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name		Valid From Date	Valid To Date	File Name	Clear
Ullage Survey								
☐	1.		Ullage survey report 1	⌄				*File Required

＋ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Click On Close Button

Click on the Save button 🖫 from the top right corner to save Form. Once the record got saved successfully, then the system will

display [✔ **Record saved**] message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◈ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on ⬦ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve　**Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on ⬦ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the icon shown. After clicking the icon

system will display with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to

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CANCEL

By Clicking on ✓ we can view the status of the record

Data Submit Status   **X**

Pos Integration

Status: SUCCESS

End Point Code	Status	Response
IPAPRJCTULLSURSAP	SUCCESS	{"PortCode":"INMAA1","DocumentNo":"INMAA1-2022-00007","Message":"Data Received Sucessfully","Status":"Sucess"}

Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

Doo No.	Status	VCN No.	Vessel Name	IMO Number	Application Type	Site ID	Draft Aft Mean	Doo Date	Doo Approved Date	Data Source	Portal Agent Code	Portal Agent Name	Created By	Created Date
INMAA1-2022-00009	Approved	INMAA120220056	MT anusha	3456789078	EXPORT	INMAA1	8	07-05-2022 11:07	07-05-2022 11:08	PORTAL			700021	07-05-2022 11:07
INMAA120220005	Approved	INMAA120220056	MT anusha	3456789078	EXPORT	INMAA1	4	18-04-2022 15:47	18-04-2022 15:49	POS			POSUSER1	18-04-2022 15:49
INMAA1-2022-00007	Approved	INMAA120220056	MT anusha	3456789078	EXPORT	INMAA1	3	18-04-2022 14:19	18-04-2022 14:52	PORTAL			700021	18-04-2022 14:19
INMAA120220004	Cancelled	INMAA120211447	MT liquidcdr	1211211	IMPORT	INMAA1	10	07-04-2022 13:29	07-04-2022 13:32	POS			POSUSER1	07-04-2022 13:32
INMAA120220003	Approved	INMAA120211980	MT Samrudh	34313431	IMPORT	INMAA1	9	06-04-2022 18:27	06-04-2022 18:27	POS			POSUSER1	06-04-2022 18:27
INMAA1-2022-00004	Approved	INMAA120211980	MT Samrudh	34313431	IMPORT	INMAA1	9	05-04-2022 13:46	05-04-2022 13:47	PORTAL			700021	05-04-2022 13:46
INMAA120220002	Approved	INMAA120211980	MT Samrudh	34313431	IMPORT	INMAA1	9	05-04-2022 12:33	05-04-2022 12:33	POS			POSUSER1	05-04-2022 12:33
INMAA1-2022-00002	Approved	INMAA120211980	MT Samrudh	34313431	IMPORT	INMAA1	9	01-04-2022 19:36	01-04-2022 19:37	PORTAL			700021	01-04-2022 19:36
INMAA120220001	Approved	INMAA120211979	MT LEXP IV	3949591	EXPORT	INMAA1	8	01-04-2022 16:26	01-04-2022 16:32	POS			POSUSER1	01-04-2022 16:32
INMAA1-2021-00140	Approved	INMAA120211967	MT SAGAR	3045123	IMPORT	INMAA1	8	31-03-2022 19:13	31-03-2022 19:13	PORTAL			700021	31-03-2022 19:12

User Interface Image 70-Ullage Survey (List Data)-10.5.4

22. BUSINESS FUNCTION NAME: DRAFT SURVEY

22.1   DEFINITION:

Initial Draft survey is done before starting the Loading Operation (For Bulk Cargo). Final Draft survey is done on completion of Loading Operation. Interim Surveys also can be carried out on Vessel or Port demand (For Bulk Cargo). Final draft survey can be recorded by the stevedore/agent using portal. A copy of final draft survey is attached for reference.

22.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ▦ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar →Cargo→ Cargo Operations → Draft Survey→ Click on New button 🗋
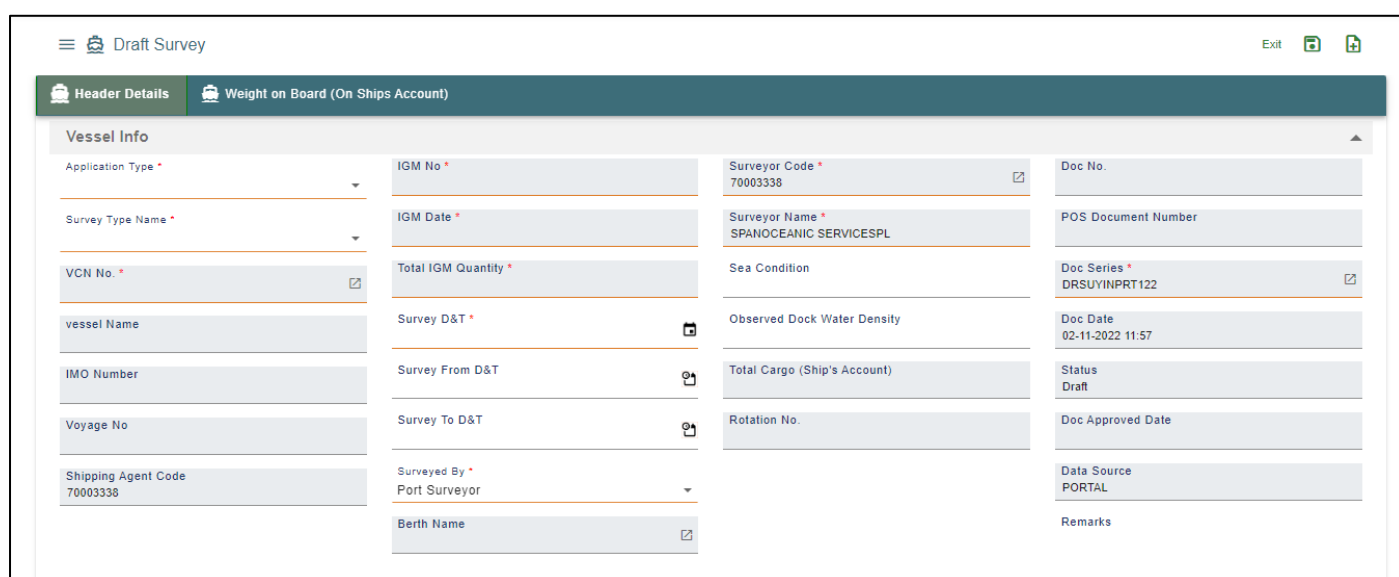
USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX WHICH IS AVAILABLE ON TOOL BAR SECTION.

22.3   PREREQUISITES – MASTERS

22.4   SCREENSHOT

Following Screenshots are from Draft Survey.

Step 1- Click on New button and We will redirect to screen like below.

User Interface Image 59-Draft Survey (A)- 9.5.1

User Interface Image 59-Draft Survey (B)- 9.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

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Below are the Field Information regarding Header Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)
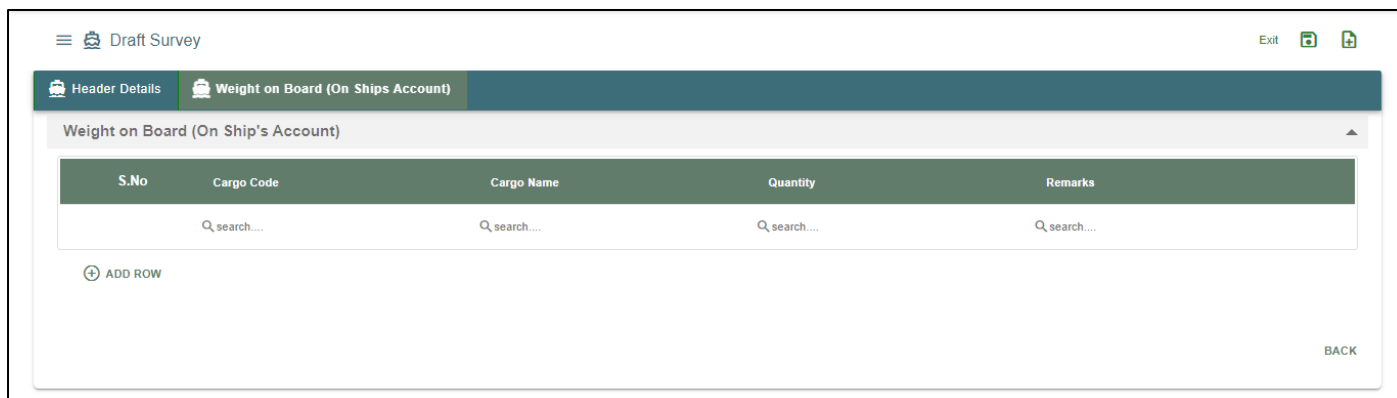
Field Name	Mandatory	Fill Type
Application Type	Mandatory	Dropdown
VCN No.	Mandatory	Pop Up
Vessel Name	Non Mandatory	Textbox
IMO No	Non Mandatory	Textbox
Voyage No	Non Mandatory	Textbox
Shipping Agent	Non Mandatory	Textbox
Importer Name	Non Mandatory	Textbox
IGM No	Yes	Textbox
IGM Date	yes	Textbox
Total IGM Quantity	yes	Textbox
Date & Time of Survey*	Mandatory	Date Picker
Surveyed By	yes	Dropdown
Surveyor Code	yes	Pop Up
Surveyor Name	yes	Text Box
Draft Survey Report No	Mandatory	Text Box
Sea Condition	Non Mandatory	Text Box
Observed Dock Water Density	Non Mandatory	Text Box
Total Cargo(Ship's Account)	Non Mandatory	Text Box
Draft Fwd. Mean	Mandatory	Textbox
Draft Aft Mean	Mandatory	Textbox
Draft Midship Port	Non Mandatory	Textbox
Draft Midship Starboard	Non Mandatory	Textbox
Corrected Mean of Means	Non Mandatory	Text Box
Corresponding Displacement/Dead Weight(Ship's Data)	Non Mandatory	Text Box
Trim Correction	Non Mandatory	Text Box
Density Correction	Non Mandatory	Text Box
Corrected Displacement/Dead Weight	Non Mandatory	Text Box
Difference in Displacement	Non Mandatory	Text Box
Change on Ships Account	Non Mandatory	Text Box
Discharged Quantity	Non Mandatory	Text Box

Step 3: Click 🖫 button from Top Menu Bar to save Header Details form record. Once it is saved Weight on Board section will be activated to add Weight on Board Details.

Record saved

Step 4: Once Header Details are saved, Weight on Board Details will be activated as below to add Weigh on Board Details as shown in below screen.
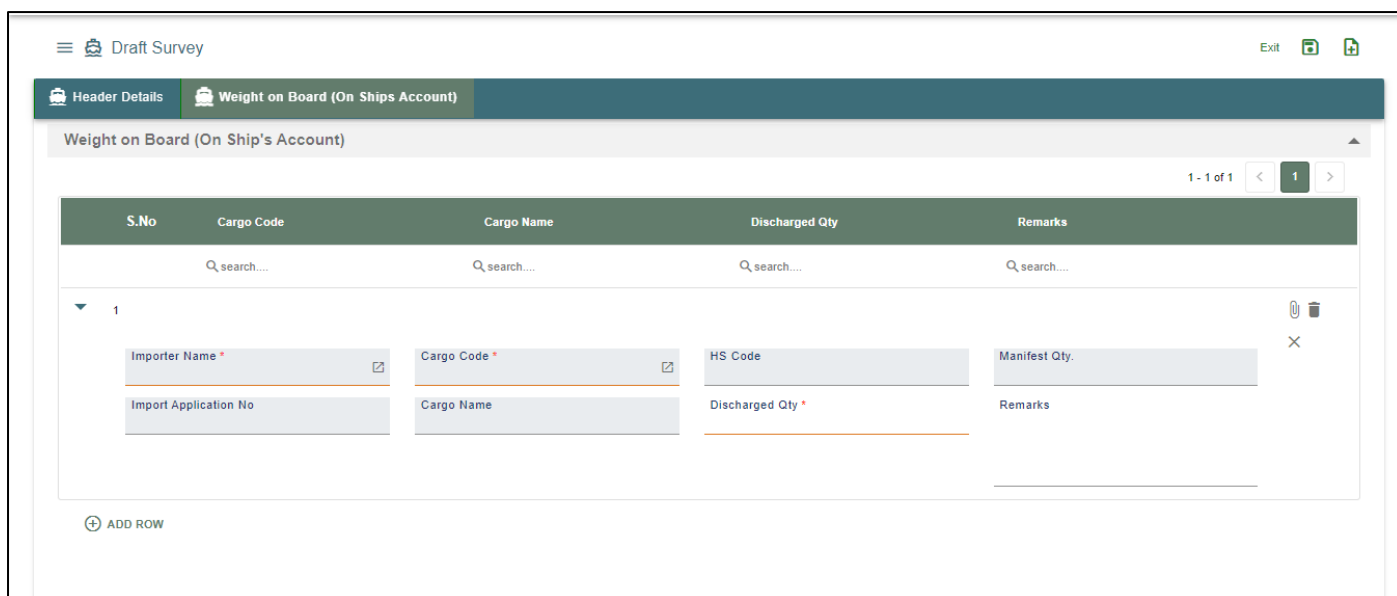
User Interface Image 60-Draft Survey(Weight on Board)- 9.5.2(a)

Click on **⊕ Add Row** to begin with data entry

User Interface Image 61-Draft Survey(Weight on Board)- 9.5.2(b)

Below are the Field Information regarding Weight On Board (Ship Account) Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Importer Code	Non Mandatory	Pop Up
Importer Name	Non Mandatory	TextBox
Cargo Code	Non Mandatory	Pop UP
Cargo Name	Non Mandatory	Text Box
Quantity	Non Mandatory	Text Box
Remarks	Non Mandatory	Text Box

Step 5: Once data is filled in Weight on Board Details, click on save button [icon] and click on [+ Add Row] if need to add multiple Row's or else click on [icon] button.

Adding the files manually once the record got saved, Click on the [icon] icon. Then the user will be redirected to the popup window as below –

Click on [+ Add files] button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [icon] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [paperclip] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Draft Survey							
☐	1.		Survey Report 1 ⌄				*File Required

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Once all the mandatory and required fields are filled then Click on Upload ⬆ button. System will display the status **File uploaded** on the screen.

Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Draft Survey							
☐	1.		Survey Report 1 ⌄				*File Required

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Click On Close Button

Click on the Save button 💾 from the top right corner to save Form. Once the record got saved successfully, then the system will display ✓ **Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◈ .

Choose an option ✕

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on ⬨ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval ✕

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on ⬨ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon system will display **Confirmation required** with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to

215

CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 64-Draft Survey (List Data)- 9.5.4

23. BUSINESS FUNCTION NAME: SERVICE REQUISITION

23.1   DEFINITION:

Agent requests for services like fresh water, Fire Services, Garbage clearance to the port through Portal providing necessary Data. Request will be received in iPortman application to the respective department for review and approval.

23.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Common Functions→ Requests → Service Requisition→ Click on New button

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX WHICH IS AVAILABLE ON TOOL BAR SECTION.

23.3   PREREQUISITES – MASTERS
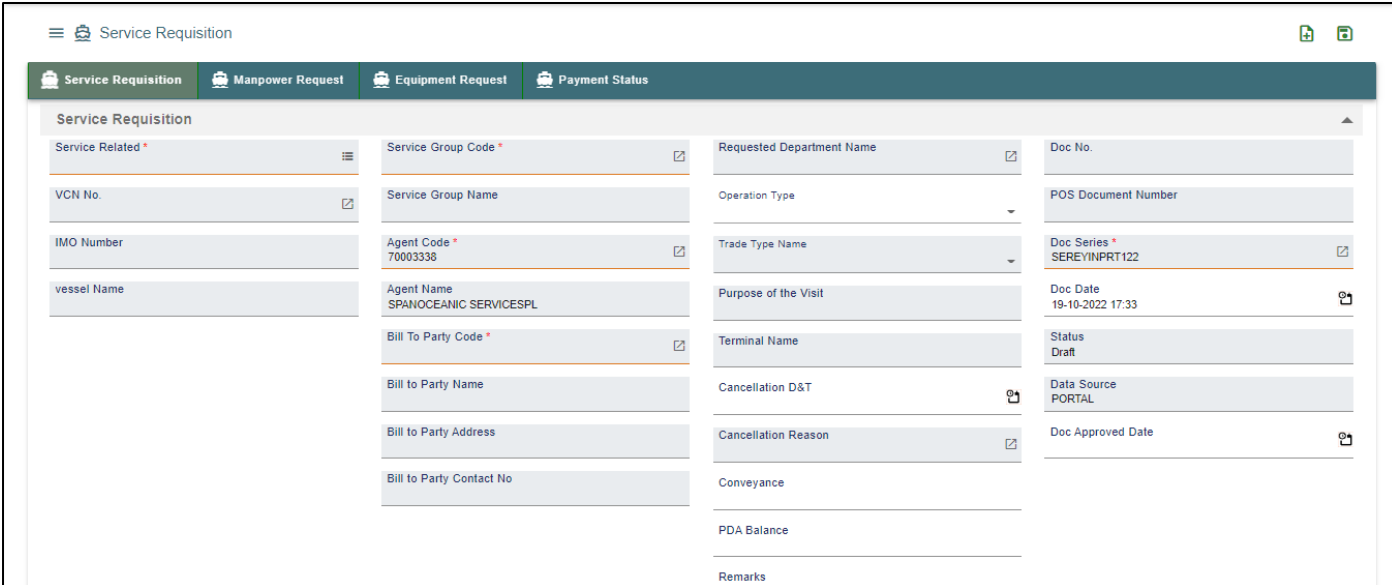
1. World Port Master
2. Cargo Type Master
3. Vessel Type Master

23.4 SCREENSHOTS

Following Screenshots from Service Requisition

Step 1-Click on New button ⬚ . The user shall redirect to the screen like below-

User Interface Image 177-Service Requisition 19.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Service Requisition Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	MANDATORY	Fill Type
Service Related	YES	BL Lookup
VCN No.	NO	BL Lookup
IMO No.	NO	Textbox/Auto Populated
Vessel Name	NO	Textbox/Auto Populated
Agent Code	YES	BL Lookup
Agent Name	NO	Textbox/Auto Populated
Service Group Code	Yes	BL Lookup
Service Group Name	NO	Textbox
Bill To Party Code	YES	BL Lookup
Bill To Party Name	NO	Textbox/Auto Populated
Requested Department Name	NO	BL Lookup
Operation Type	NO	Drop down
Trade Type Name	NO	Textbox/Auto Populated
Terminal Name	NO	Textbox/Auto Populated

Cancellation D&T	NO	Calendar
Cancellation Reason	NO	Calendar
Convenience	NO	Textbox/Auto Populated
Purpose of Visit	NO	Textbox
Remarks	No	Textbox

Step 3:-Service Details section is displayed in the same page. Click on ⊕ Add Row the button.

Step 4: The system shall display below fields to enter.

User Interface Image 178-Service Requisition 19.5.2

Below are the Field Information regarding Service Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Service Code	YES	BL Lookup
Service Name	No	Textbox
Masters Declaration	NO	Textbox
Provisions Qty	NO	Textbox
Service Required	NO	Textbox
Qty to Remove	NO	Textbox
Customs Declaration No.	NO	Textbox
No. of Divers Required	NO	Textbox
No. of Resources Required	NO	Textbox
No. of Trips	NO	Textbox
Onboard Cargo Quantity	NO	Textbox
Onboard Cargo Description	NO	Textbox
Requested From D&T	NO	Calendar

Requested To D&T	NO	Calendar
Surveyor Name	NO	BL Lookup
Stevedore Name	NO	BL Lookup
Location Name	NO	BL Lookup
Hazardous	NO	Checkbox
Special Instructions	NO	Textbox
Work Permit / Permission Allotment No	NO	BL Lookup
From Location Name	NO	BL Lookup
To Location	NO	BL Lookup
Berth Name	NO	BL Lookup
Approved From D&T	NO	Calendar
Approved To D&T	NO	Calendar
Approved Qty	NO	Calendar
Approved No. of Divers Required	NO	Textbox/Auto Populated
Approved No. of Resources Required	NO	Textbox/Auto Populated
Over Time Applicable	NO	Dropdown
Over Time Start Time	NO	Time
Over Time End Time	NO	Time
Total Over Time	NO	Time
Meter End Time	NO	Time
Meter Start Time	NO	Time
Meter No.	NO	Textbox
Meter End Reading	NO	Textbox
Meter Start Reading	NO	Textbox
Total Delivered Meter Quantity	NO	Textbox
Bill Of Entry No	NO	Textbox
RI No.	NO	Textbox
Custom Permission No.	NO	Textbox
Shed Location	NO	Textbox
Yard No	NO	BL Lookup
Area To be Cleaned	NO	Textbox
Dangerous Goods Description	NO	Textbox/Auto Populated
IMDG No	NO	Textbox/Auto Populated
Bill Of Entry Date	NO	Calendar
RI Date	NO	Calendar
Custom Permission Date	NO	Calendar
Out of Charge Date	NO	Calendar
ETB	NO	Calendar
Marine Bunker Supervision Required	NO	Dropdown
BE Qty.	NO	Textbox
RI Qty.	NO	Textbox
Custom Permission Qty	NO	Textbox
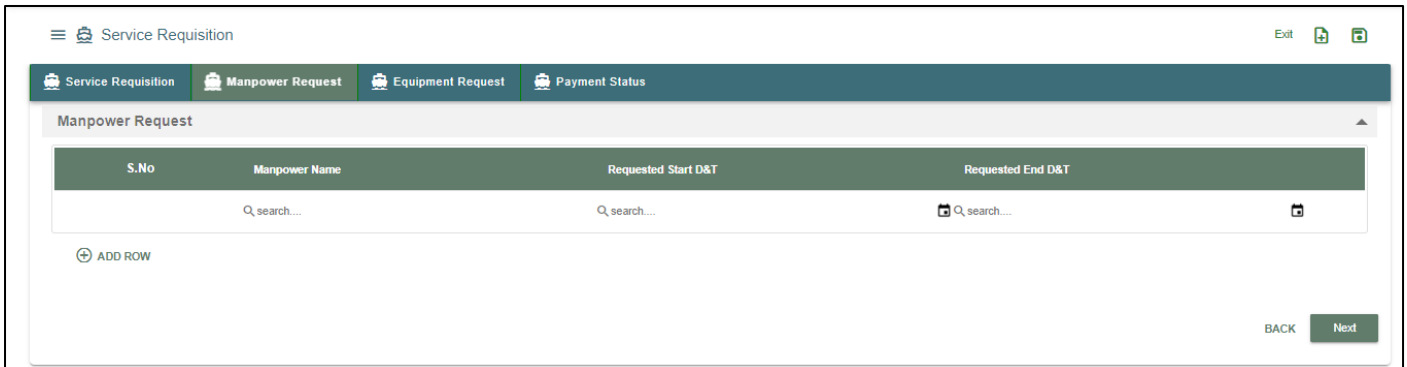
Out of Charge Quantity	NO	Textbox
Out of Charge No	NO	Textbox
Delivered Qty.	NO	Textbox/Auto Populated
Remaining Qty.	NO	Textbox/Auto Populated
Delivered From D&T	NO	Calendar
Delivered To D&T	NO	Calendar
Total Time	NO	Textbox/Auto Populated
Status Code	NO	Textbox/Auto Populated
Cleaning Required D & T	NO	Textbox/Auto Populated
Additional Instructions	NO	Textbox/Auto Populated
Waste Type	NO	Form lookup
Transit Code	NO	Dropdown
Transit Cargo Quantity (MT)	NO	Textbox/Auto Populated
Delivery Through	NO	Dropdown
Application Type	NO	Dropdown
ICD Flag	NO	Dropdown
Balance No of Packages	NO	Textbox
Vehicle No	NO	Lookup
Gate in D&T	No	Calendar
Gate Out D&T	No	Calendar
Application Type	No	Dropdown
Shipping Bill No	No	Auto Populated
Shipping Bill Quantity	NO	Auto Populated
Loaded Quantity	No	Auto Populated
Loaded No of Packages	No	Auto Populated
No of Employees Allotted	NO	Textbox/Auto Populated
Service Type code	No	Auto Populated
Service Type Name	No	Auto Populated
Sub Service Type Name	No	Auto Populated
UOM 1 Code	No	Auto Populated
UOM 1 Name	No	Auto Populated
QT1	No	Auto Populated

Step 5: Once all the mandatory and required fields are filled then Click on the Next button from the bottom of the page. Then the user will be redirected to the Manpower Allotment page as below -

Click on ⊕ Add Row the button.

User Interface Image 179-Service Requisition 19.5.3

Step 6: The system shall display below fields to enter.

User Interface Image 180-Service Requisition 19.5.4

Below are the Field Information regarding Manpower Request Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

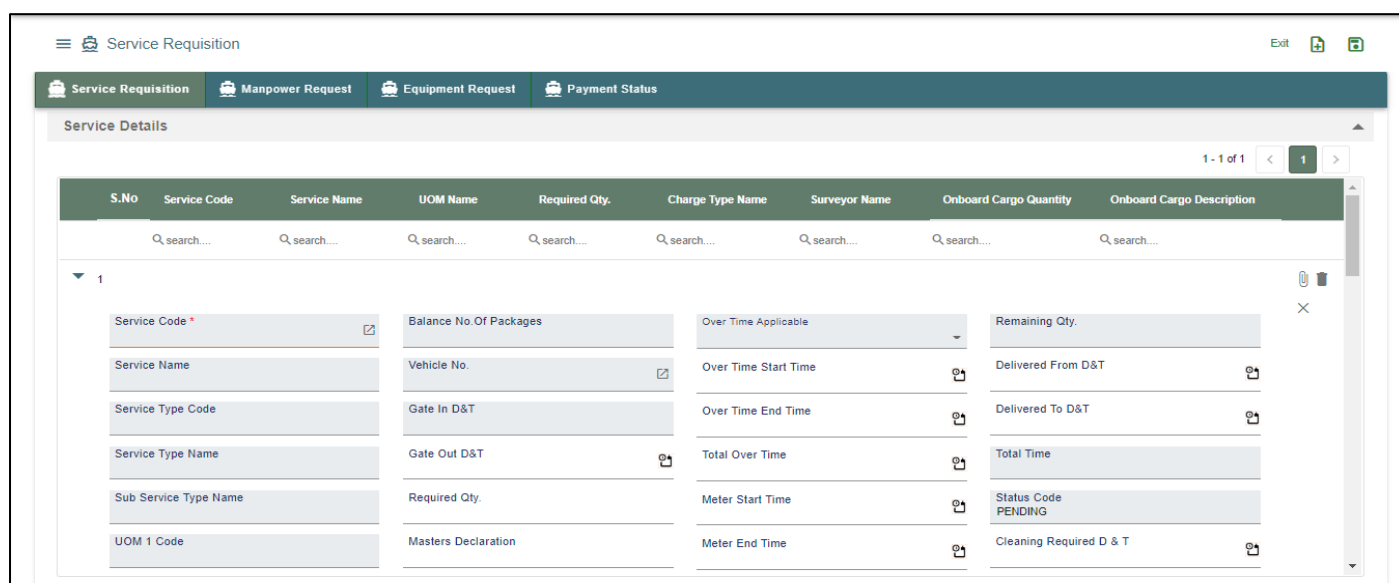| Field Name	Mandatory	Fill Type
Number of Employees Alloted	No	Auto Populated
Employee Code	No	Auto Populated
Employee Name	No	Auto Populated
Designation	No	Auto Populated
Department	No	Auto Populated
Alloted Start Date & Time	No	Auto Populated
Alloted End Date & Time	No	Auto Populated
Remarks	No	Auto Populated

Step 7: Once all the mandatory and required fields are filled then Click on the **Next** button from the bottom of the page. Then the user will be redirected to the Equipment Allotment page as below -
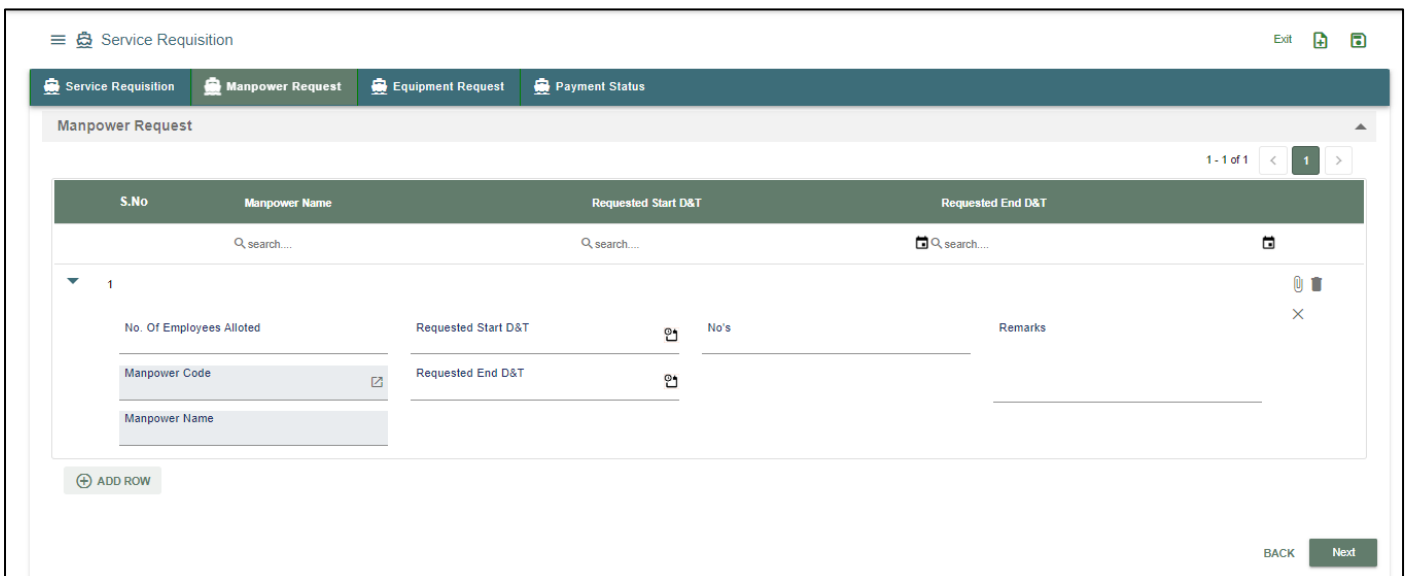
Click on ⊕ Add Row the button.

User Interface Image 181-Service Requisition 19.5.5

Step 8: The system shall display below fields to enter.

User Interface Image 182-Service Requisition 19.5.6
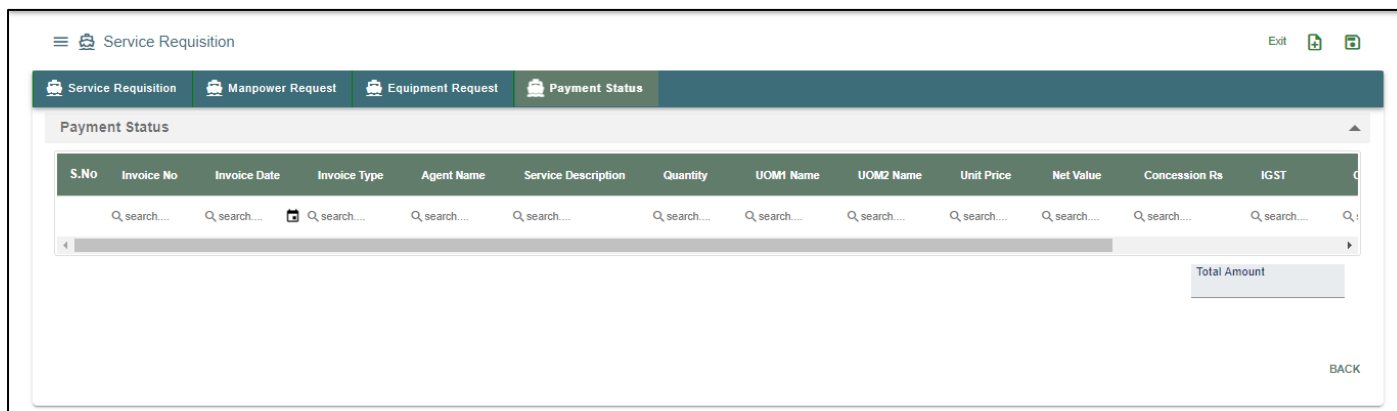
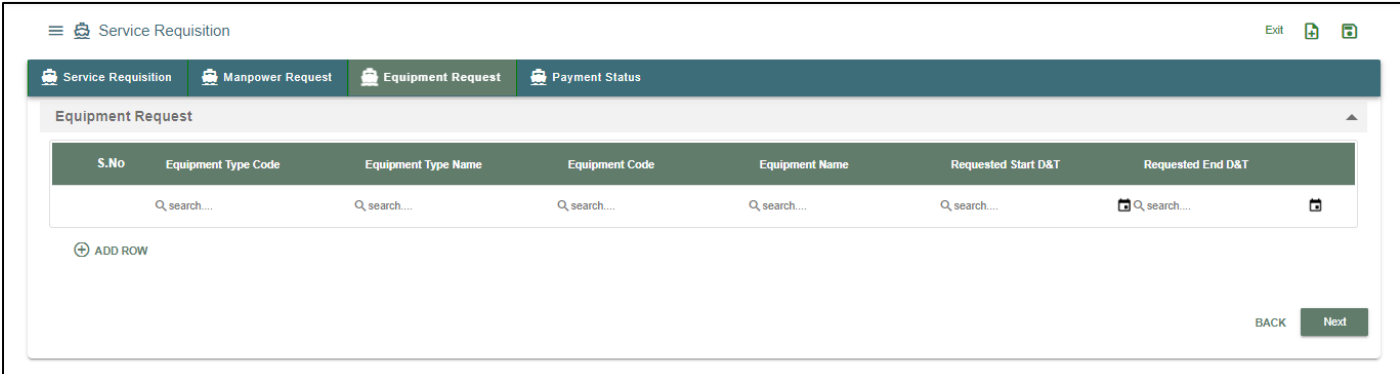Below are the Field Information regarding Equipment Request Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

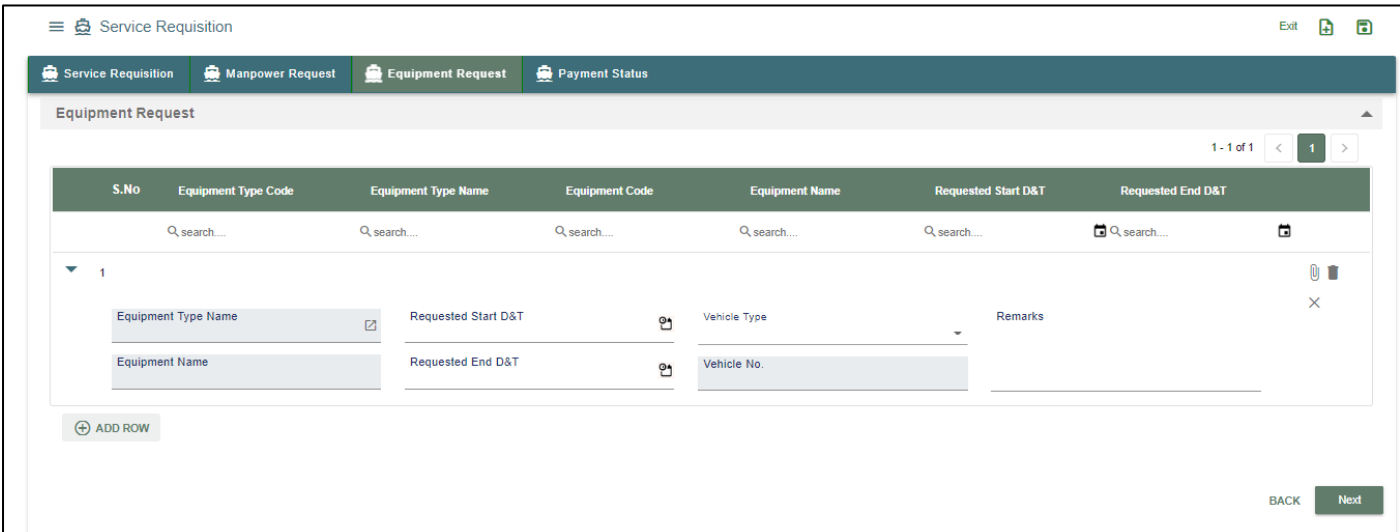| Field Name	Mandatory	Fill Type
Equipment Type Code	No	Auto Populated
Equipment Name	No	Auto Populated
Alloted Start Date & Time	No	Auto Populated
Alloted End Date & Time	No	Auto Populated
Vehicle Type	No	Auto Populated
Vehicle No	No	Auto Populated
Remarks	No	Auto Populated

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Step 9: Once all the mandatory and required fields are filled then Click on the Next button from the bottom of the page. Then the user will be redirected to the Payment Status page as below –

User Interface Image 183-Service Requisition 19.5.6(a)
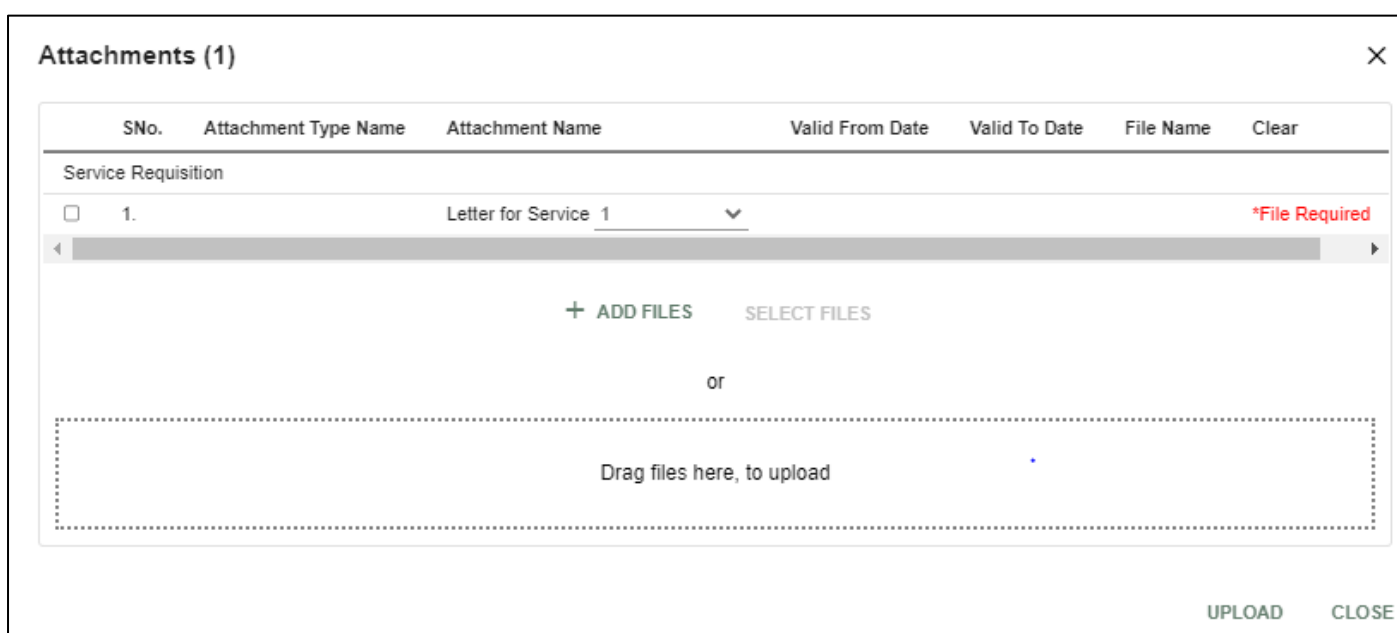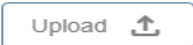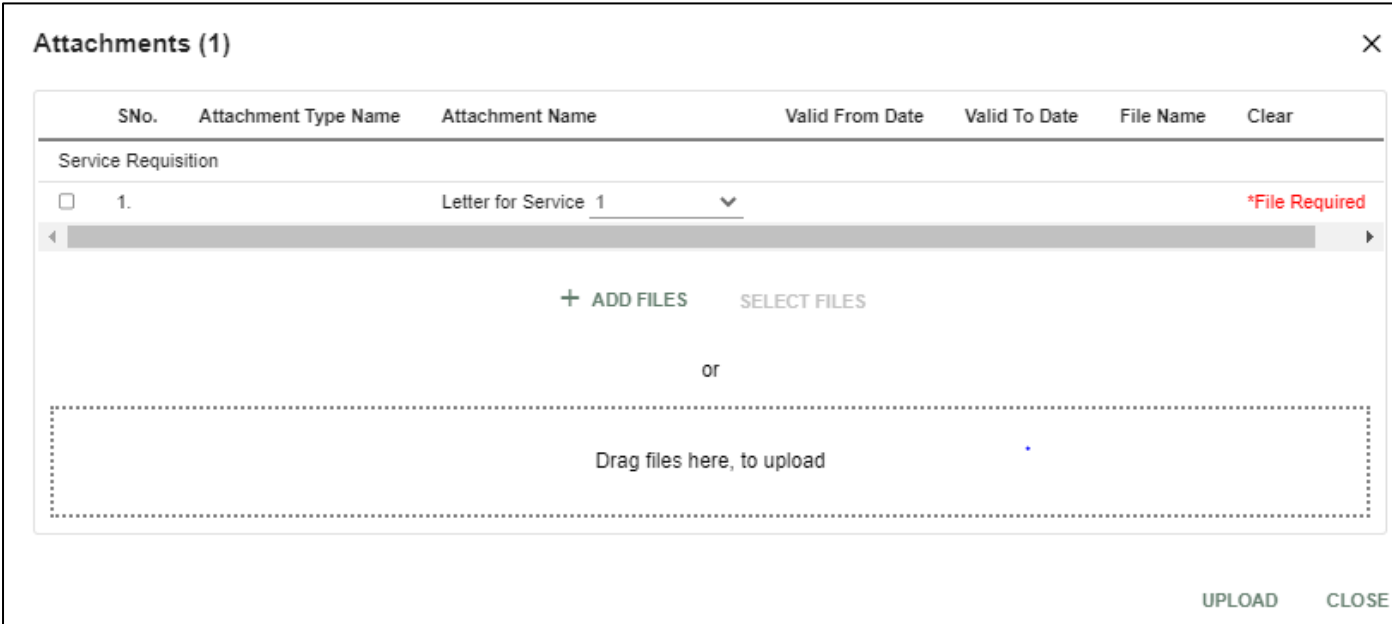
Step 10: Click on the Save button from the top right corner to save the Form. Once the record got saved successfully, then the system will display Record saved message.

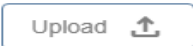**Step 11:** Aftersaving the record click on the icon. Then the user will be redirected to the Attachments Window. –

User Interface Image 184-Service Requisition 19.5.8

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Step 12: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through **Upload ⬆** button and can download the attached document by clicking on the file name attached.

Attachments (1)							✕
SNo.	Attachment Type Name	Attachment Name		Valid From Date	Valid To Date	File Name	Clear
Service Requisition							
☐ 1.		Letter for Service 1 ˅					*File Required

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 185-Service Requisition 19.5.9

Step 13: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through **Upload ⬆** button and can download the attached document by clicking on the file name attached.

Step 14: Configure Check List in Check List Form for respective forms. Then Click on 🔳 icon. Configured parameters will display in the Check List Window.
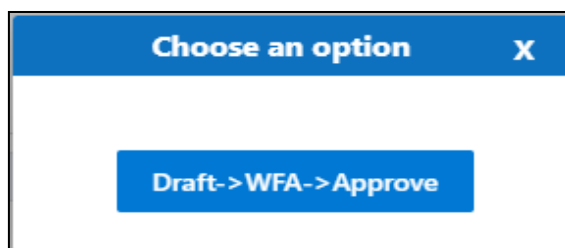
Check List				💾 X
Parameter Code	Parameter Name	Yes/No	REMARKS	
FRESH WATER	Fresh Water	☐		
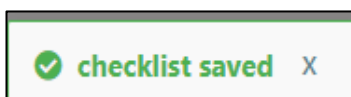
Step 15: Click on Save, System will display the **✓ checklist saved X** status on the screen.

Step 16: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◇ .
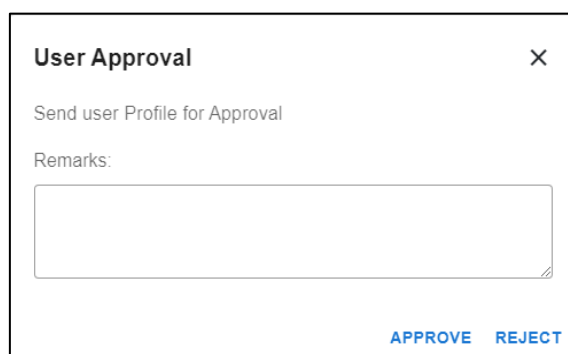
Choose an option ✕

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step17: Once the workflow is initiated click on the icon. System will be display **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to WFAPP

Step18: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step19: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step20: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 21: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display **Ok** and status will change to CANCEL

Step 22: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as

Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 186-Service Requisition 19.5.10

Step 23: Click on [icon] icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

By Clicking on [icon] can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

24. BUSINESS FUNCTION NAME: SERVICE ALLOTMENT

24.1   DEFINITION:

Agent requests for services like fresh water, Fire Services, Garbage clearance to the port through Portal providing necessary Data. Request will be received in iPortman application to the respective department for review and allot.

24.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU [icon] SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Common Functions→ Recordings→ Service Allotment→ Click on New button [icon]

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX [icon] WHICH IS AVAILABLE ON TOOL BAR SECTION.

24.3   PREREQUISITES – MASTERS

24.4 SCREENSHOTS
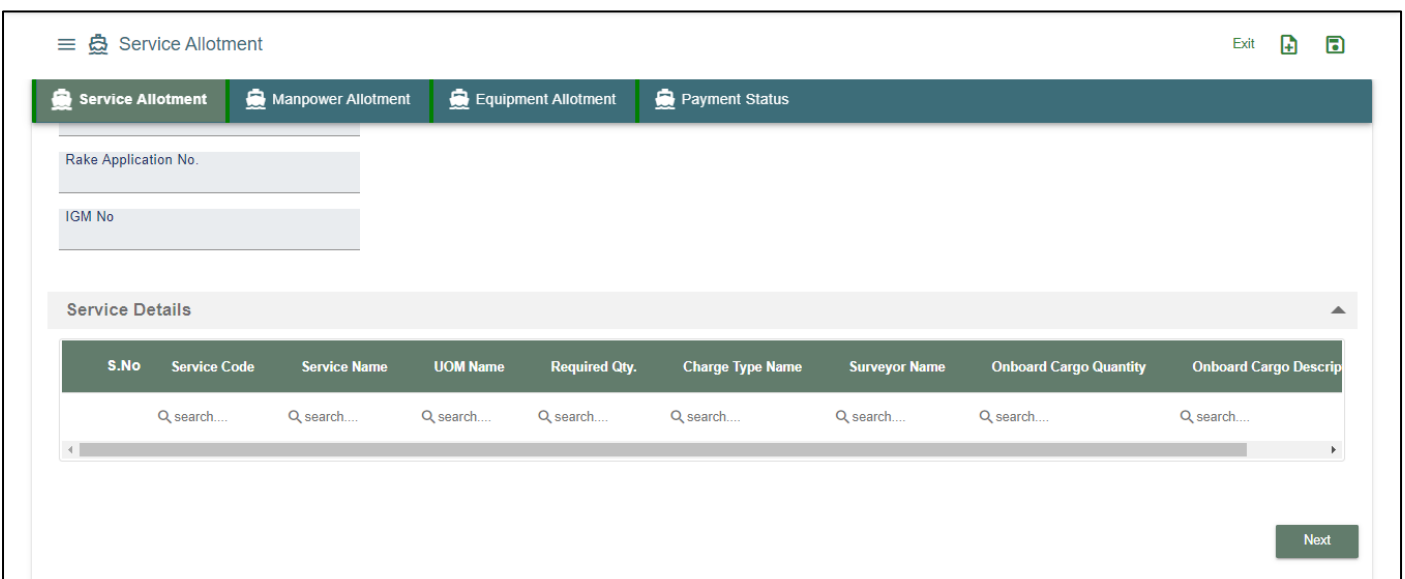
Following are the Screenshots from Service Allotment.

Step 1-Click on New button ⊞ . The user shall redirect to the screen like below-.

User Interface Image 187-Service Allotment 20.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Step 3: The system shall display below fields to enter.
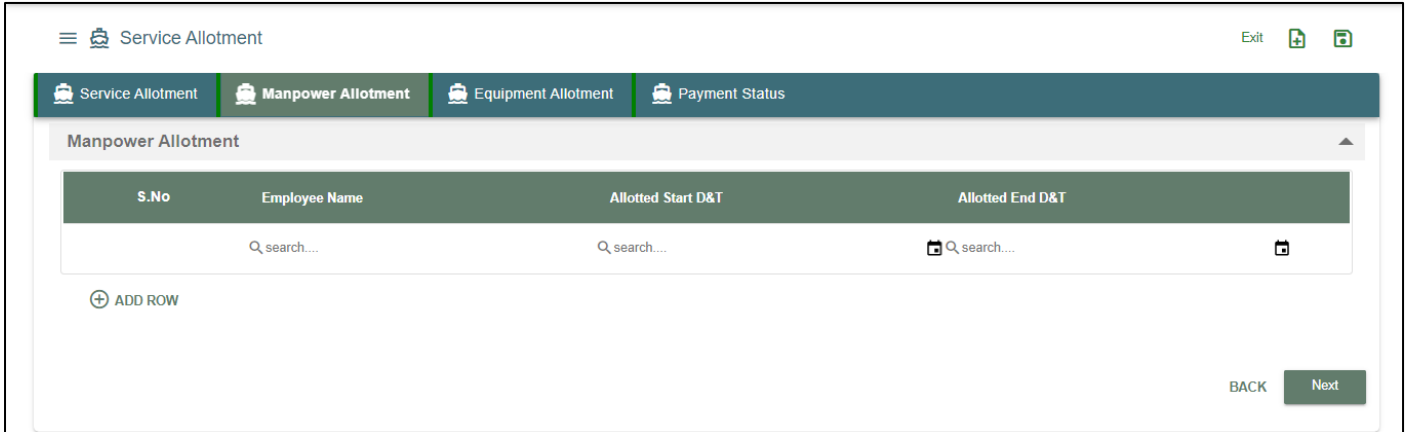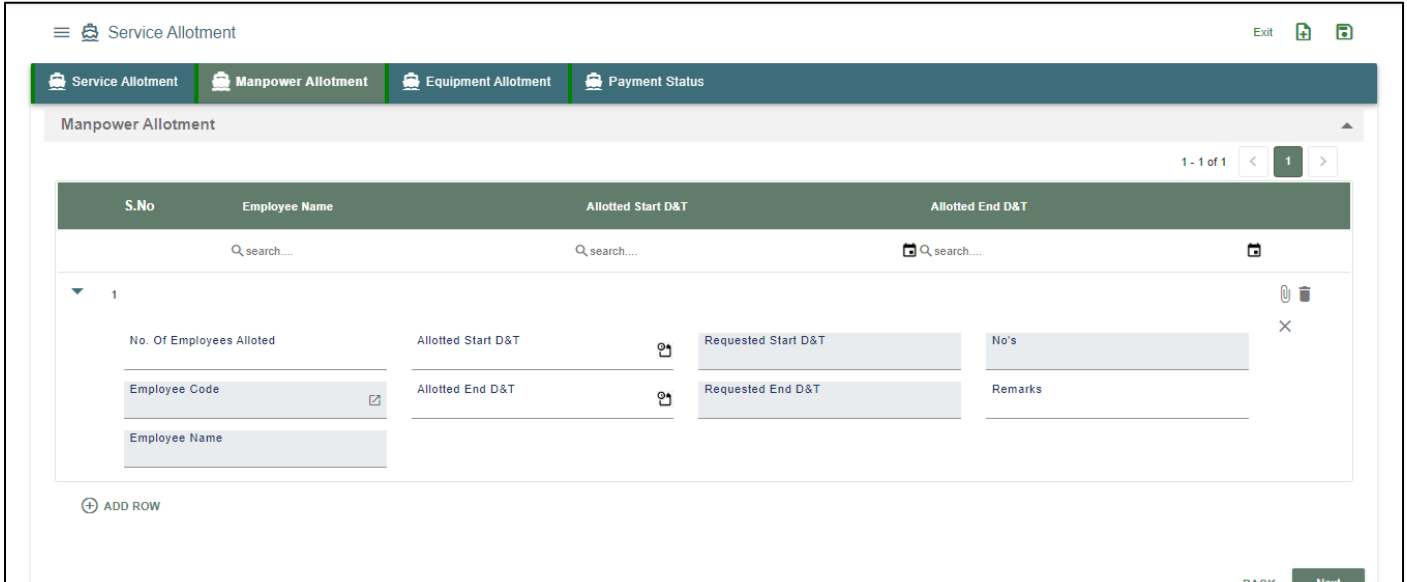

User Interface Image 188-Service Allotment 20.5.2

Step 4: Once all the mandatory and required fields are filled then Click on the **Next** button from the bottom of the page. Then the user will be redirected to the Manpower Allotment page as below -

Click on **⊕ Add Row** the button.

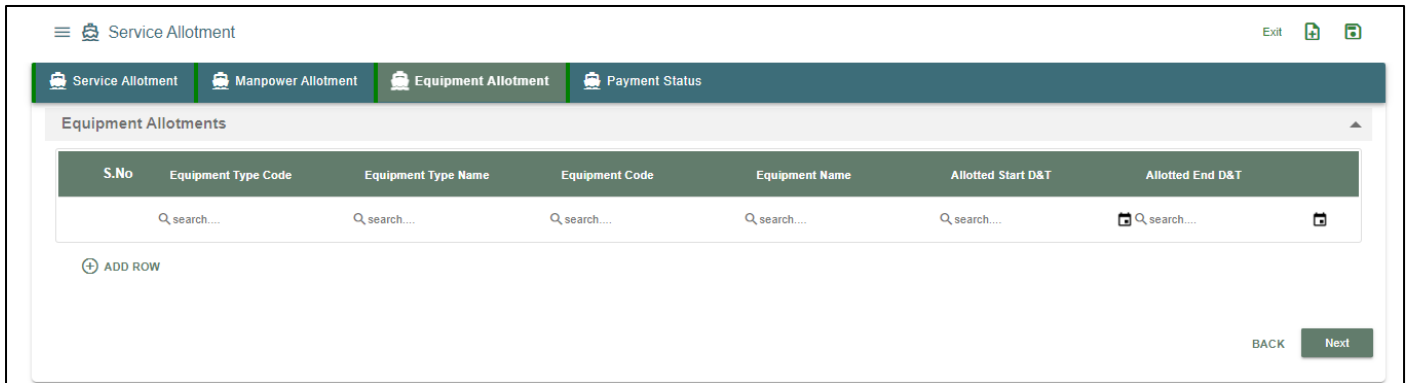*User Interface Image 189-Service Allotment 20.5.3*

Step 5: After Clicking the **⊕ Add Row** it will show the given field as shown

User Interface Image 190-Service Allotment 20.5.4

Step 6: Once all the mandatory and required fields are filled then Click on the **Next** button from the bottom of the page. Then the user will be redirected to the Equipment Allotment page as below -

Click on **⊕ Add Row** the button.
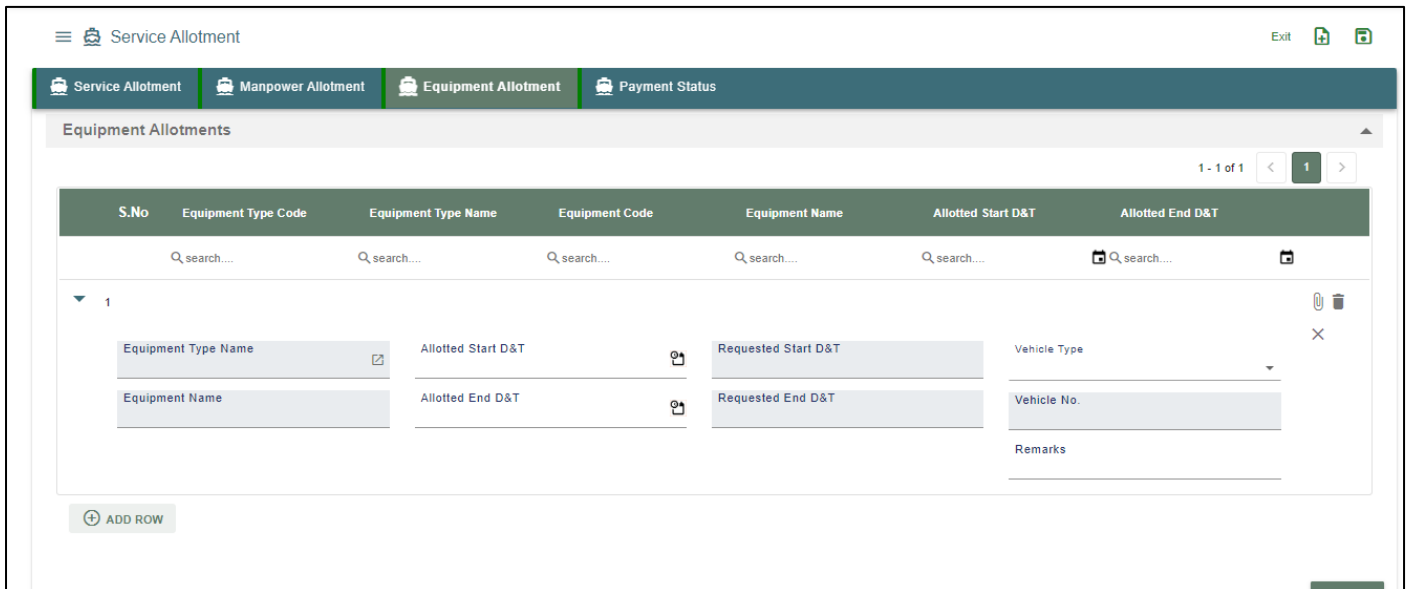
User Interface Image 191-Service Allotment 20.5.5

Step 7: After Clicking the ⊕ Add Row it will show the given field as shown
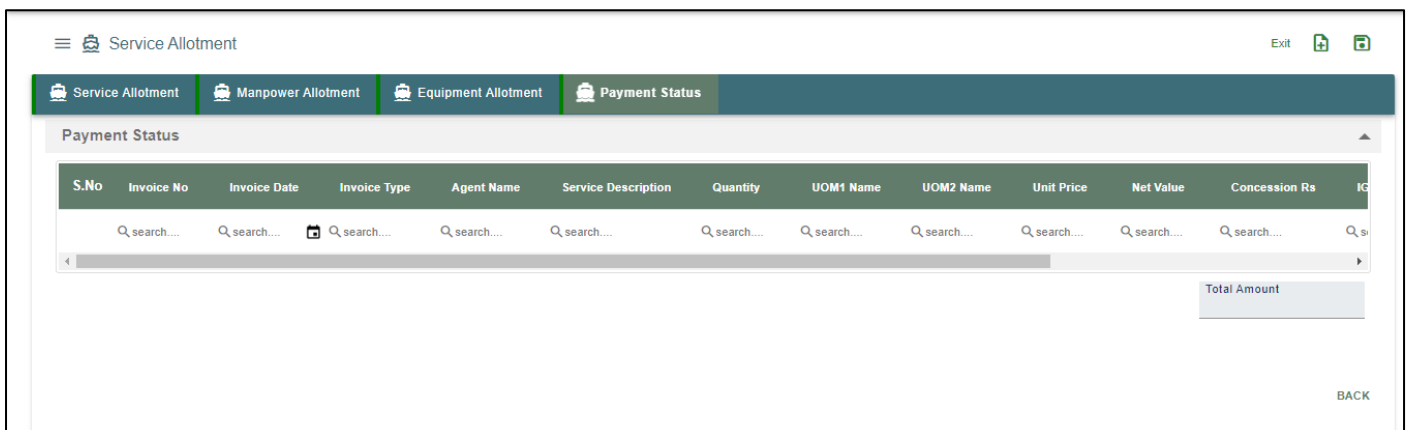

User Interface Image 192-Service Allotment 20.5.6

Step 8: Once all the mandatory and required fields are filled then Click on the Next button from the bottom of the page. Then the user will be redirected to the Payment Status page as below –

User Interface Image 192-Service Allotment 20.5.6(a)

Step 9: Click on the Save button ⬚ from the top right corner to save the Form. Once the record got saved

successfully, then the system will display ✅ Record saved message.

Step 10: Aftersaving the record click on the 📎 icon. Then the user will be redirected to the Attachments Window. –

Attachments (0)   ✕

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 193-Service Allotment 20.5.7

Step 11: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through Upload ⬆ button and can download the attached document by clicking on the file name attached.

Attachments (0) ✕

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 194-Service Allotment 20.5.8

Step 12: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through Upload ⬆ button and can download the attached document by clicking on the file name attached.

Step 13: Configure Check List in Check List Form for respective forms. Then Click on ▤ icon. Configured parameters will display in the Check List Window.

	Check List			💾 X
Parameter Code	**Parameter Name**	**Yes/No**	**REMARKS**	
FRESH WATER	Fresh Water	☐		

Step 14: Click on Save, System will display the ✅ checklist saved X status on the screen.

Step 15: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◈ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step16: Once the workflow is initiated click on the icon. System will be display **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to WFAPP

Step17: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step18: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to APPROVED

Step19: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'.

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If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 20: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ×

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step 21: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 22: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

Alert Message ×

ⓘ Do you want to cancel?

NO   YES

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

Cancellation ✕

Reason Description *

Remarks

Requested By

EXIT   PROCEED

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display [Ok] and status will change to CANCEL

Step 23: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

☰ 🏛 Service Allotment

Doc No.	Status	Service Requisition No	VCN No.	Vessel Name	Doc Approved Date	Data Source	Doc Date	Created By	Created Date
🔍search...	🔍search...	🔍search...	🔍search...	🔍search...	search....	🔍search...	search....	🔍search...	search....

User Interface Image 195-Service Allotment 20.5.9

Step 24: Click on 🔍 icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

Search   ✕

Field	Condition	Value1	Value2	Concatenate Condition
⌄	⌄	search....	search....	and ⌄

⊕ Add Row

Clear ✕   Search 🔍

By Clicking on ▽ can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

25. BUSINESS FUNCTION NAME: SERVICE DELIVERY

25.1   DEFINITION:

Agent requests for services like fresh water, Fire Services, Garbage clearance to the port through Portal providing necessary Data. Request will be received in iPortman application to the respective department for review and approval.

25.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

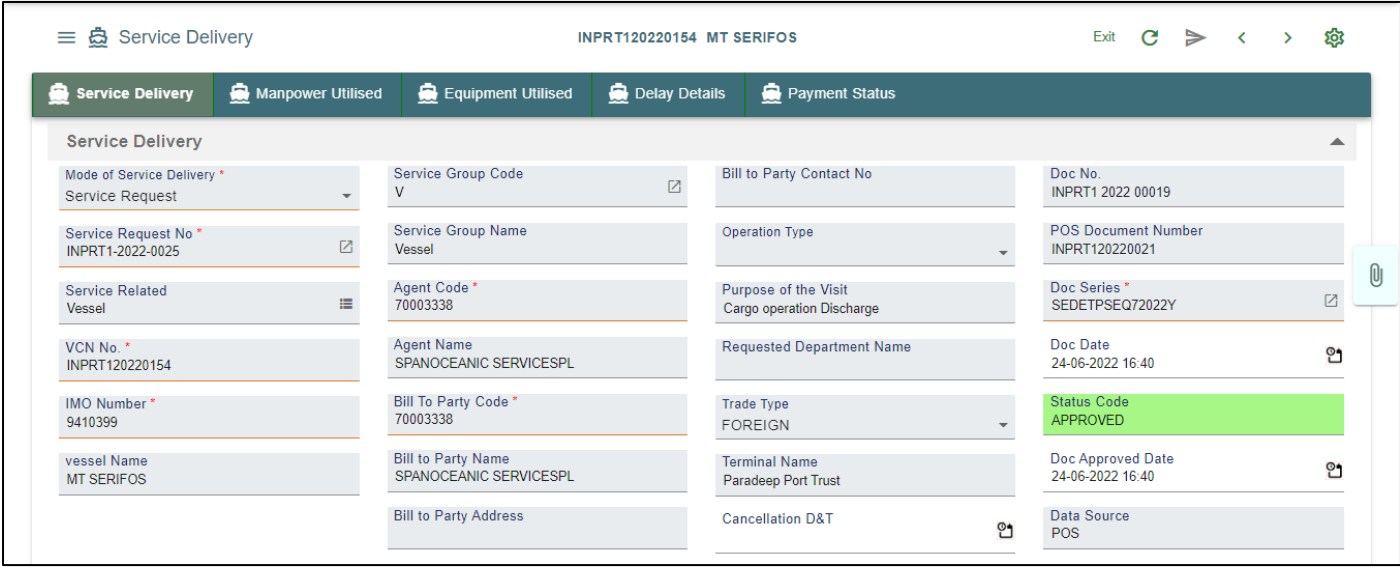| **Menu Path**	Menu Bar → Common Functions→ Recordings→ Service Delivery Work Order→ Click on New button ⊕

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

25.3   PREREQUISITES – MASTERS

25.4   SCREENSHOTS

Following are the Screenshots from Service Recording.

Step 1-Click on New button ⊕ . The user shall redirect to the screen like below-.
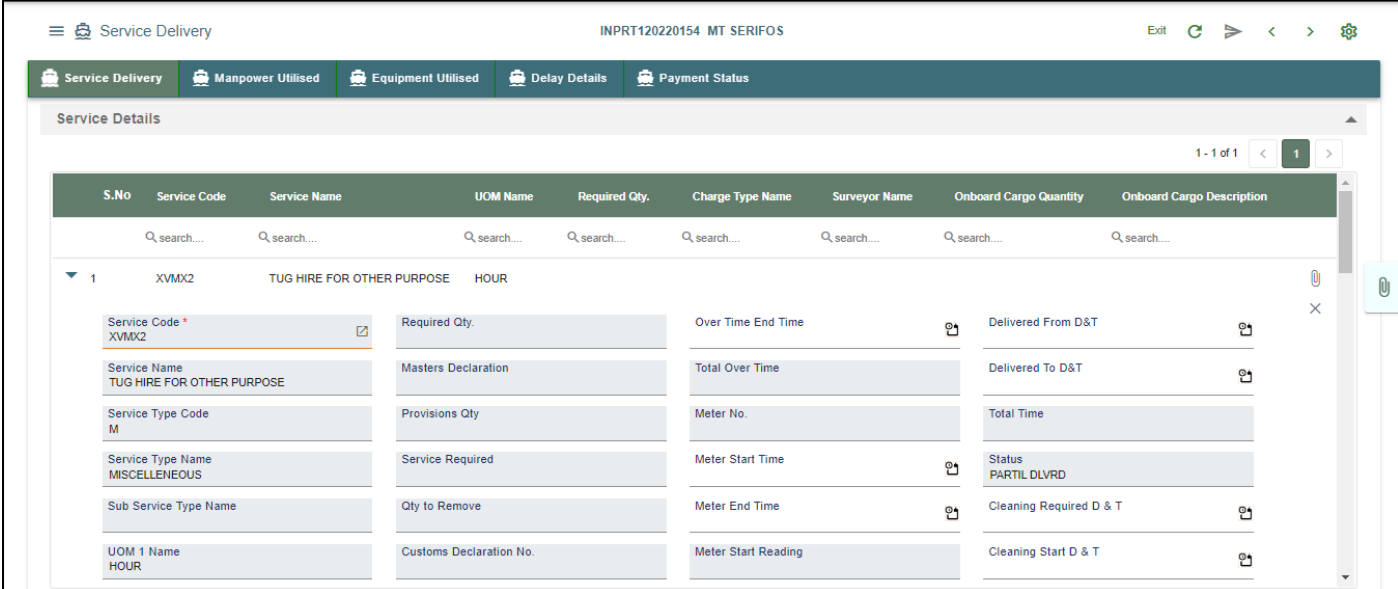

User Interface Image 196-Service Delivery 21.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Step 3:-Service Details section is displayed in the same page. Click on ⊕ Add Row the button.
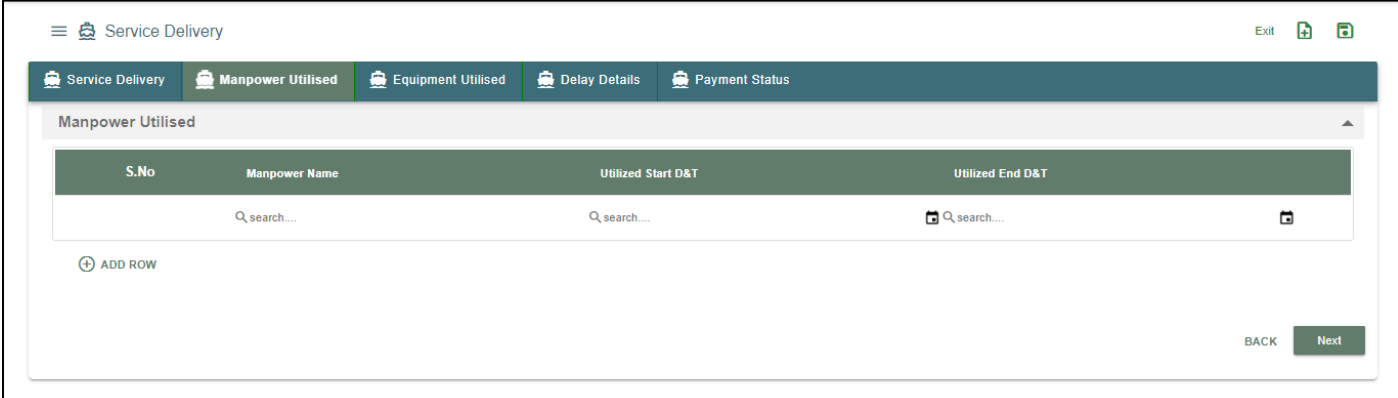
Step 4: The system shall display below fields to enter.

User Interface Image 197-Service Delivery 21.5.2

Step 5: Once all the mandatory and required fields are filled then Clickon the **Next** button from the bottom of the page. Then the user will be redirected to the Manpower Utilized page as below -
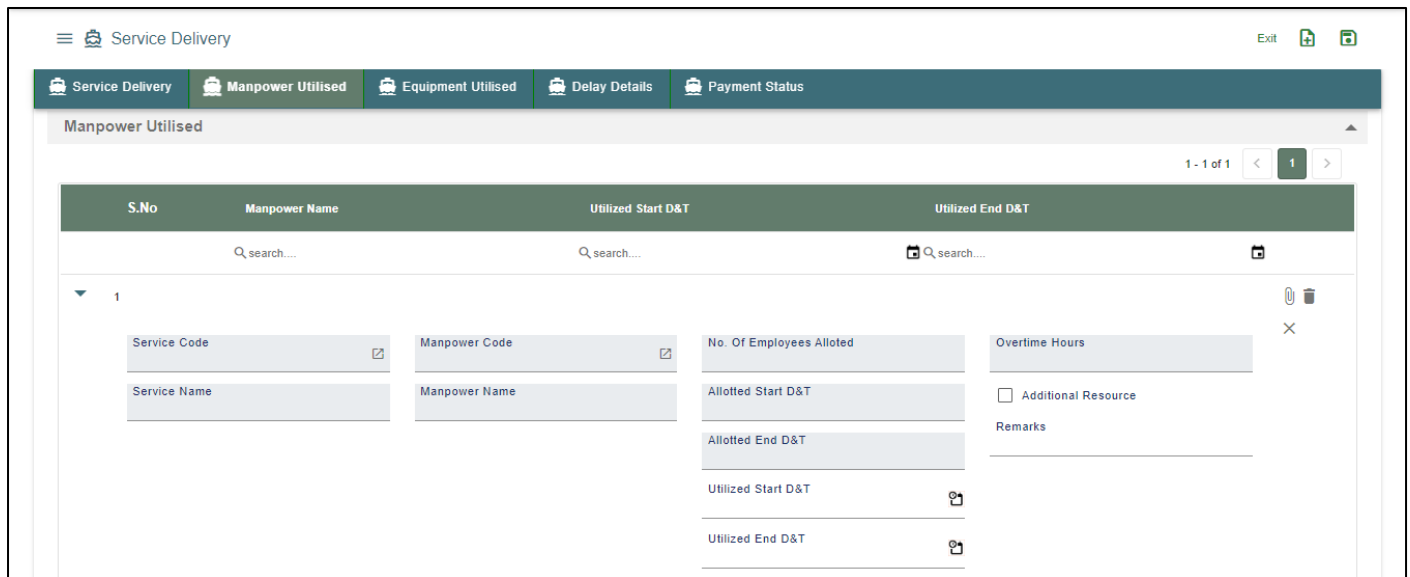
Click on **⊕ Add Row** the button.

User Interface Image 198-Service Delivery 21.5.3

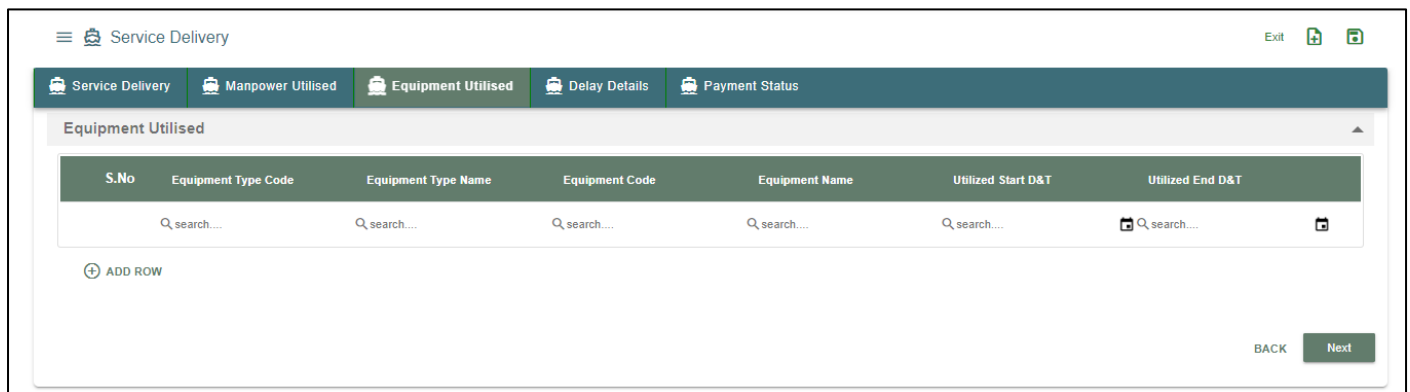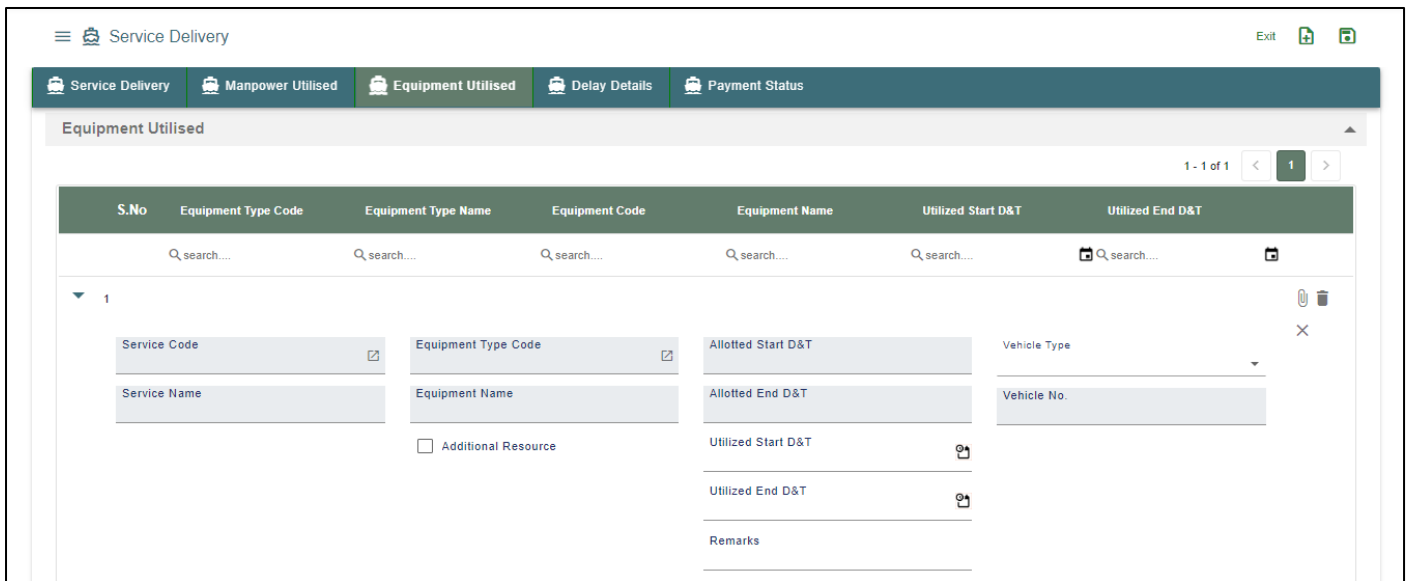**Step 6**: After Clicking the **⊕ Add Row** it will show the given field as shown

User Interface Image 199-Service Delivery 21.5.4

Step 7: Once all the mandatory and required fields are filled then Click on the **Next** button from the bottom of the page. Then the user will be redirected to the Equipment Utilized page as below -

Click on **⊕ Add Row** the button.

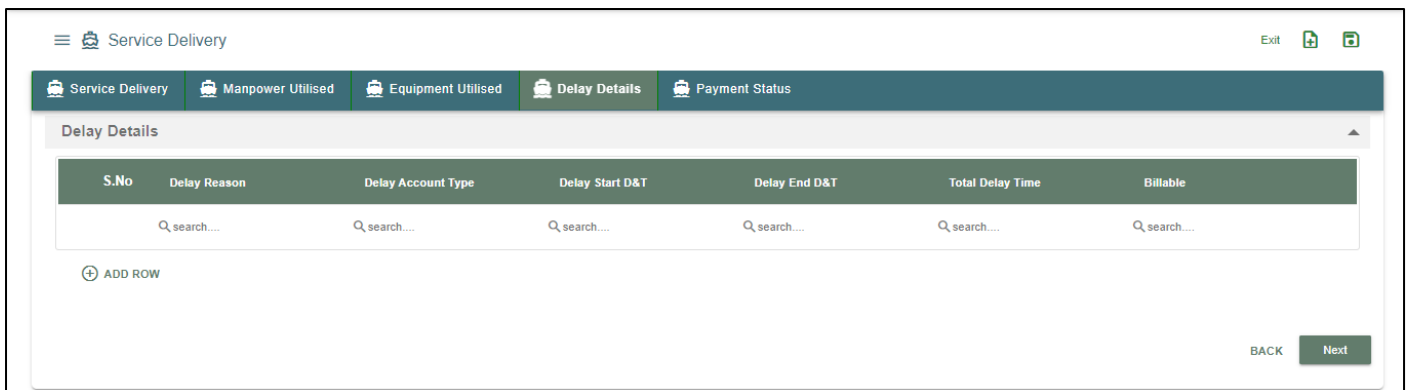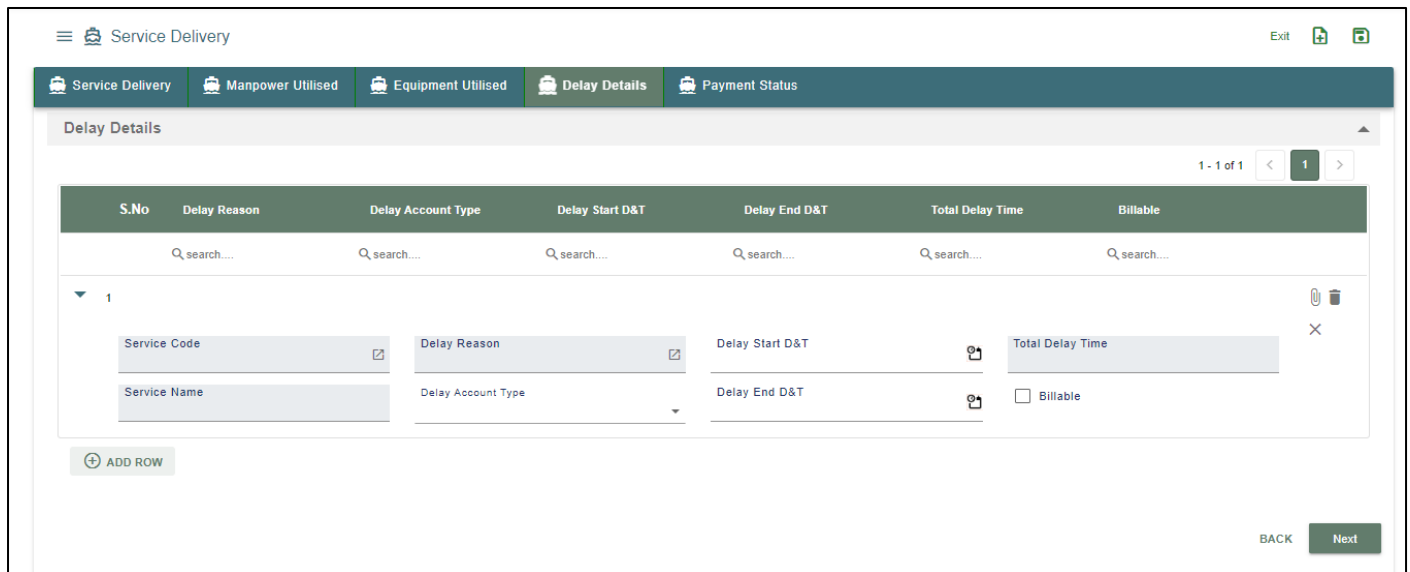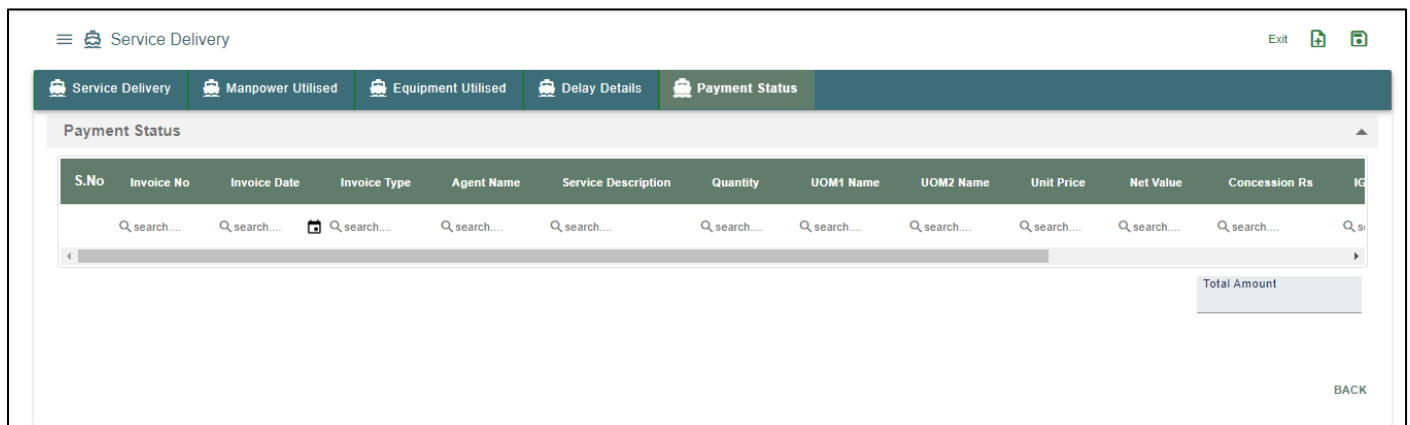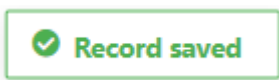*User Interface Image 200-Service Delivery 21.5.5*

Step 8: After Clicking the **⊕ Add Row** it will show the given field as shown

User Interface Image 201-Service Delivery 21.5.6

Step 9: Once all the mandatory and required fields are filled then Click on the Next button from the bottom of the page. Then the user will be redirected to the Delay Details page as below -

Click on ⊕ Add Row the button.

User Interface Image 202-Service Delivery 21.5.7

Step 10: After Clicking the ⊕ Add Row it will show the given field as shown

User Interface Image 203-Service Delivery 21.5.8

Step 11: Once all the mandatory and required fields are filled then Click on the **Next** button from the bottom of the page. Then the user will be redirected to the Payment Status page as below –

User Interface Image 204-Service Delivery 21.5.9

Step 11: Click on the Save button 🖫 from the top right corner to save the Form. Once the record got saved successfully, then the system will display **⊘ Record saved** message.

Step 12: Aftersaving the record click on the 🔗 icon. Then the user will be redirected to the Attachments Window. –

Attachments (0) ✕

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Step 13: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through **Upload ⬆** button and can download the attached document by clicking on the file name attached.

Attachments (0) ✕

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

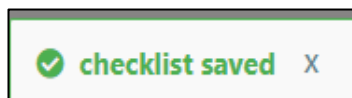+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 205-Service Delivery 21.5.11

Step 14: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through **Upload ⬆** button and can download the attached document by clicking on the file name attached*.*

Step 15: Configure Check List in Check List Form for respective forms. Then Click on [icon] icon. Configured parameters will display in the Check List Window.

Check List				🖫 **X**
Parameter Code	**Parameter Name**	**Yes/No**	**REMARKS**	
FRESH WATER	Fresh Water	☐		

Step 16: Click on Save, System will display the ✅ checklist saved X status on the screen.

Step 17: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ⬥ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step18: Once the workflow is initiated click on ⬥ the icon. System will be display **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ×

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to WFAPP

Step19: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. ❗ **Remarks required!** .Up On

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Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step20: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval   ×

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step21: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **⓵ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 22: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

Alert Message   ×

ⓘ Do you want to cancel?

NO   YES

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display [Ok] and status will change to CANCEL

Step 23: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 206-Service Delivery 21.5.12

Step 24: Click on 🔍 icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

By Clicking on ▽ can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

26.BUSINESS FUNCTION NAME: SLUDGE CLEARANCE REQUEST

26.1   DEFINITION:

Agent requests for services for Sludge / Waste Oil Clearance to the port either through Portal by providing necessary Data. Request will be received in iPortman application for review and approval.

26.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ▦ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Marine→ Requests→ Sludge Clearance Request→ Click on New button 🗋
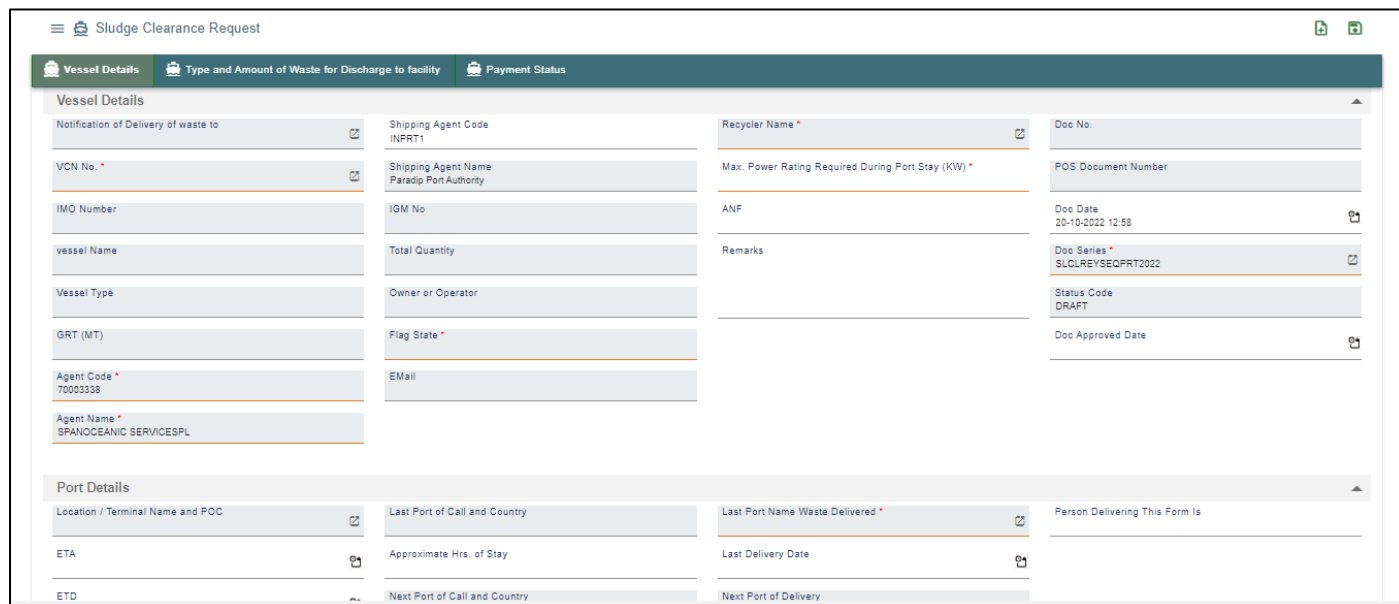
USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

26.3   PREREQUISITES – MASTERS

26.4   SCREENSHOTS

Following Screenshots are from Sludge Clearance Request.

Step 1-Click on New button 🗋 . The user shall redirect to the screen like below-.

User Interface Image 207-Sludge Clearance Request 22.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields. Port Details Section is also available in the same page.

Below are the Field Information regarding Vessel Details Section.
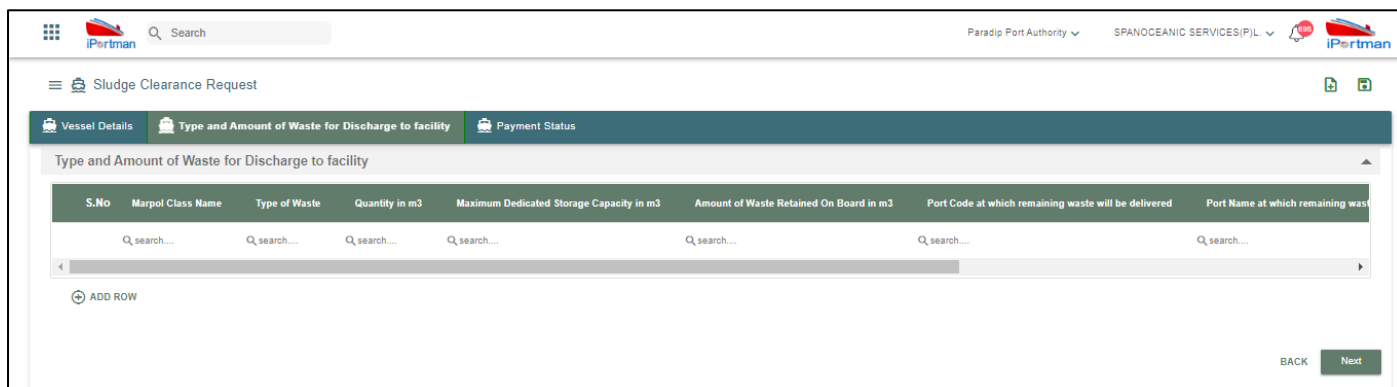
(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	MANDATORY	Fill Type
Notification of Delivery of waste to	NO	BL Lookup
VCN No.	YES	BL Lookup
IMO No.	NO	Textbox/auto populated
Vessel Name	NO	Textbox/auto populated
GRT (MT)	NO	Textbox/auto populated
Vessel Type Name	NO	Textbox/auto populated
Owner or Operator	NO	Textbox/auto populated
Flag State	YES	Textbox/auto populated
Email	NO	Textbox/auto populated
Max. Power Rating Required During Port Stay (KW)	YES	Textbox
Remarks	NO	Textbox
Location / Terminal Name and POC	NO	BL Lookup
ETA	NO	Calendar
ETD	NO	Calendar
Last Port of Call and Country	NO	Textbox
Approximate Hrs. of Stay	NO	BL Lookup
Next Port of Call and Country	NO	BL Lookup
Last Port Name Waste Delivered	YES	BL Lookup
Last Delivery Date	YES	Calendar
Next Port of Delivery	NO	BL Lookup
Person Delivering This Form Is	YES	Textbox

Step 3: Once all the mandatory and required fields are filled then Click on the Next button from the bottom of the page. Then the user will be redirected to the Type and Amount of Waste for Discharge to Facility page as below -
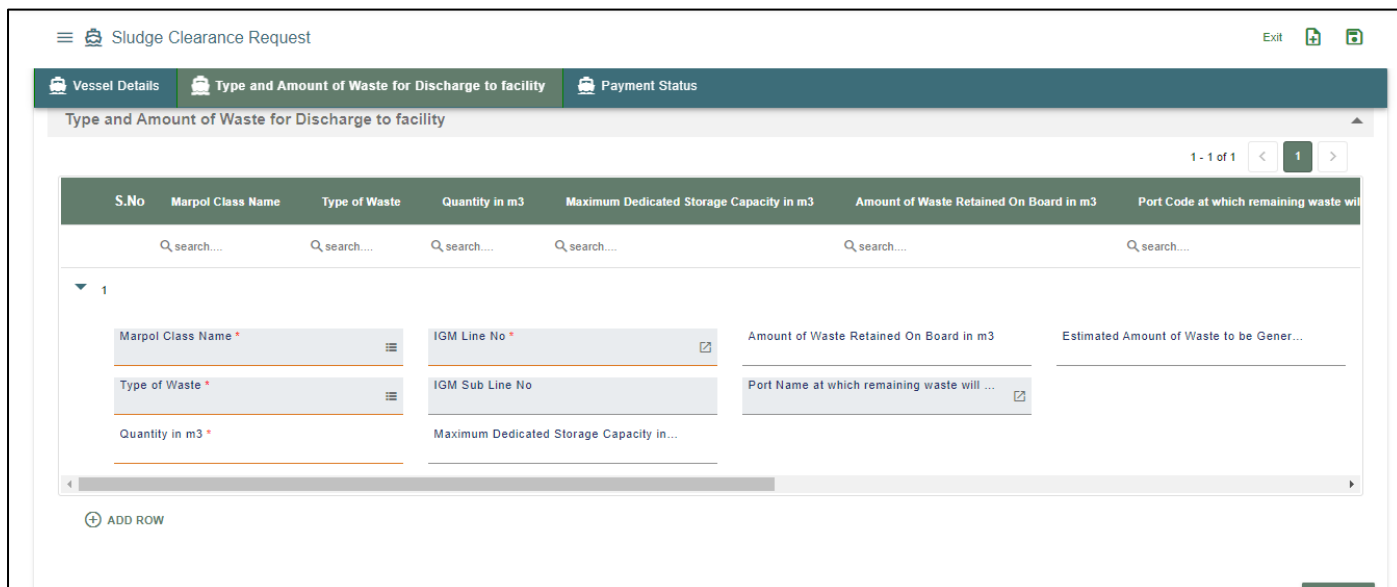
Click on ⊕ Add Row the button.

User Interface Image 208-Sludge Clearance Request 22.5.2

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Step 4: The system shall display below fields to enter.

User Interface Image 209-Sludge Clearance Request 22.5.3
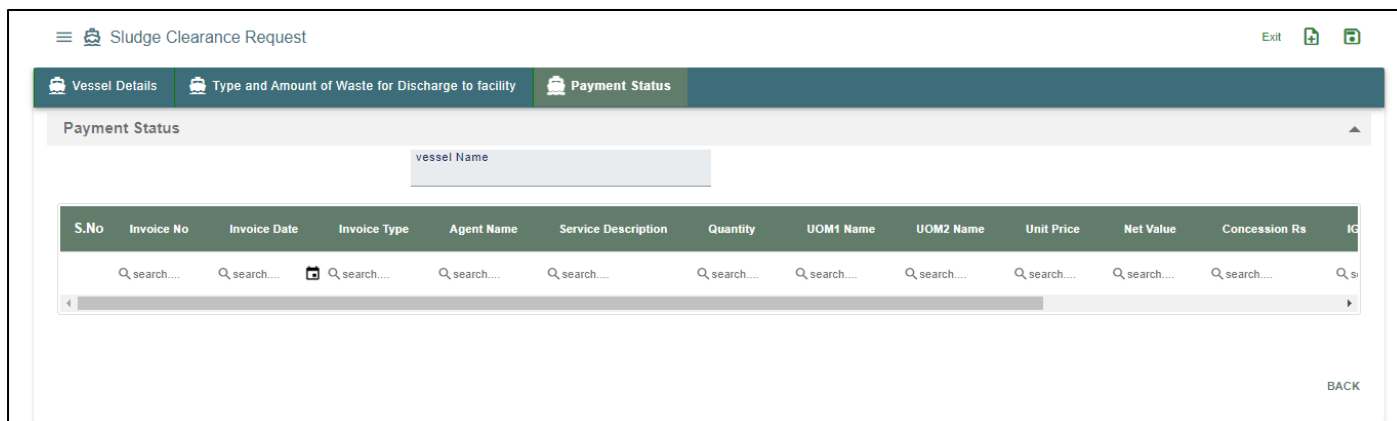
Below are the Field Information regarding Type and Amount of Waste for Discharge to Facility page Details Section.

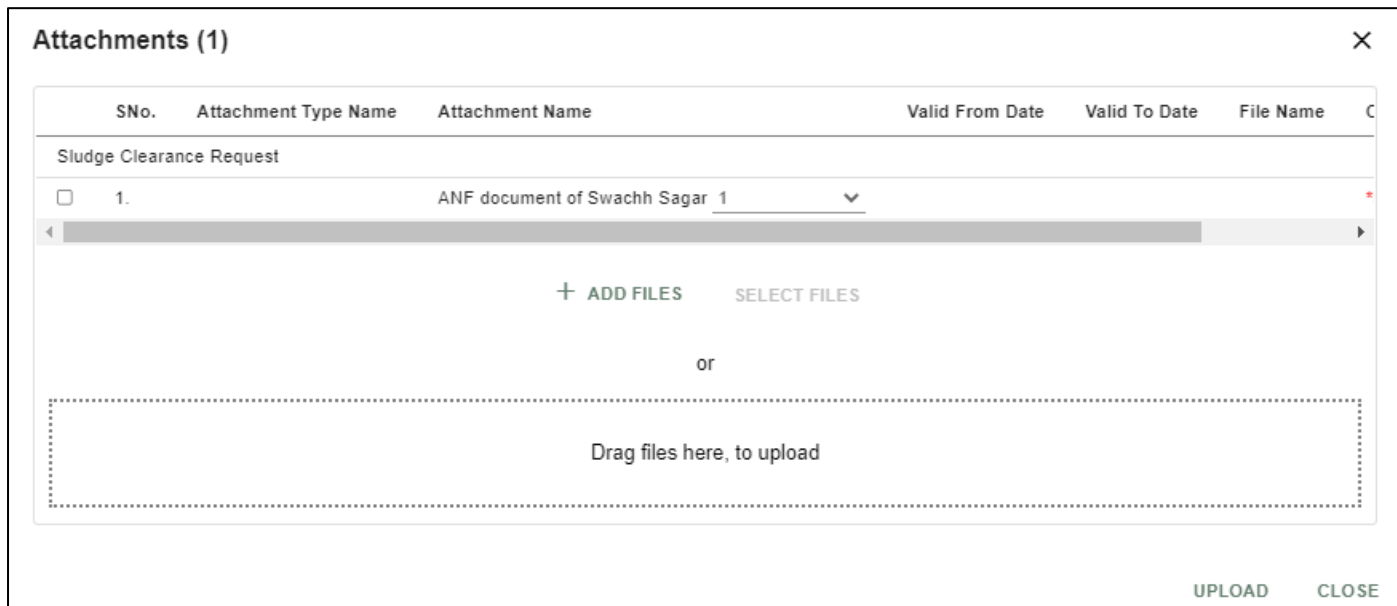(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Marpol Class Name	YES	Form Lookup / Auto populated
Type of Waste	YES	Form Lookup / Auto populated
Quantity in m3	YES	Textbox
Max. Dedicated Storage Capacity in m3	NO	Textbox
Amount of Waste retained on board in m3	NO	Textbox
Port Name at which remaining waste will be delivered	NO	BL Lookup
Estimated amount of waste to be generated between notification and next port call in m3	NO	Textbox

Step 5: Once all the mandatory and required fields are filled then Click on the **Next** button from the bottom of the page. Then the user will be redirected to the Payment Status page as below –

Step 5: Click on the Save button [icon] from the top right corner to save the Form. Once the record got saved successfully, then the system will display [Record saved] message.
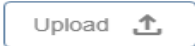
Step 6: Aftersaving the record click on the [icon] icon. Then the user will be redirected to the Attachments Window. –

User Interface Image 210-Sludge Clearance Request 22.5.4

Step 7: Click on attachment icon if any attachment are configured it will auto populate or Click on [+ Add files] fill the required fields and upload the documents if any through [Upload] button and can download the attached document by clicking on the file name attached.

User Interface Image 211-Sludge Clearance Request 22.5.5

Step 8: Click on attachment icon if any attachment are configured it will auto populate or Click on **+ Add files** fill the required fields and upload the documents if any through **Upload** button and can download the attached document by clicking on the file name attached.

Step 9: Configure Check List in Check List Form for respective forms. Then Click on icon. Configured parameters will display in the Check List Window.

Step 10: Click on Save, System will display the ✓ checklist saved X status on the screen.

Step 11: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step12: Once the workflow is initiated click on the icon. System will be display

with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step13: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. .Up On

Adding the remarks click on Reject. Alert will display on the screen and the document status will be changed as 'REJECTED'.

Step14: Once the workflow is in WFAPP. Click on the icon. System will be displaying

with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step15: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 16: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step 17: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 18: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

Alert Message ✕

(i) Do you want to cancel?

NO   YES

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

Cancellation ✕

Reason Description *

Remarks

Requested By

EXIT   PROCEED

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display Ok and status will change to CANCEL

Step 19: Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

≡ Sludge Clearance Request

Doc No.	Status	Notification of Delivery of waste to↑	VCN No.	IMO Number	Vessel Name	Owner or Operator Name	Flag State	Max. Power Rating Required During Port Stay (KW)	Do
search...	search...	search...	search...	search...	search...	search...	search...	search...	se

1 - 10 of 246   10 ˅   1 2 3 ... 23 24 25

User Interface Image 212-Sludge Clearance Request 22.5.6

Step 20: Click on 🔍 icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

Search ✕

Field	Condition	Value1	Value2	Concatenate Condition
˅	˅	search....	search....	and ˅

⊕ Add Row

Clear ✕   Search 🔍

By Clicking on ▽ can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

27. BUSINESS FUNCTION NAME: SLUDGE CLEARANCE RECORDING

27.1 DEFINITION:

Agent requests for services for Sludge / Waste Oil Clearance to the port either through Portal by providing necessary Data. Request will be received in iPortman application for review and approval.

27.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⠿ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Marine→ Recordings→ Sludge Clearance Recording→ Click on New button 📄

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

27.3 PREREQUISITES – MASTERS

1. Agent

27.4 SCREENSHOTS

Following Screenshots are from Sludge Clearance Recording.

Step 1-Click on New button 📄 . The user shall redirect to the screen like below-.

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User Interface Image 213- Sludge Clearance Recording 23.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Step 3: Once all the mandatory and required fields are filled then Click on the **Next** button from the bottom of the page. Then the user will be redirected to the Recycler Details page as below -

Click on **⊕ Add Row** the button.
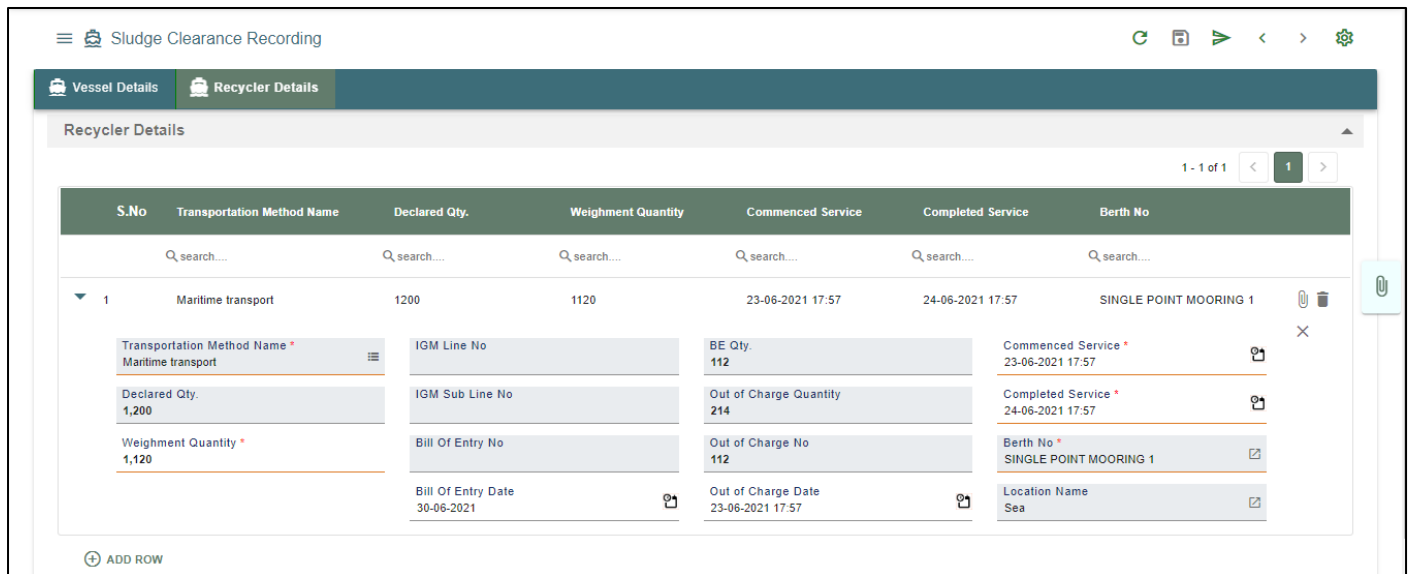
User Interface Image 214- Sludge Clearance Recording 23.5.2

Step 4: The system shall display below fields to enter.

User Interface Image 215- Sludge Clearance Recording 23.5.3

Step 5: Click on the Save button [icon] from the top right corner to save the Form. Once the record got saved

successfully, then the system will display ✓ **Record saved** message.

Step 6: Aftersaving the record click on the [icon] icon. Then the user will be redirected to the Attachments
Window. –

User Interface Image 216-Sludge Clearance Recording 23.5.4

Step 7: Click on attachment icon if any attachment are configured it will auto populate or Click on
+ Add files fill the required fields and upload the documents if any through **Upload** button and
can download the attached document by clicking on the file name attached.

Attachments (0) ✕

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 217-Sludge Clearance Recording 23.5.5

Step 8: Click on attachment icon if any attachment are configured it will auto populate or Click on ➕ Add files fill the required fields and upload the documents if any through Upload ⬆ button and can download the attached document by clicking on the file name attached.

Step 9: Configure Check List in Check List Form for respective forms. Then Click on ▤ icon. Configured parameters will display in the Check List Window.

Check List			🖫 X
Parameter Code	**Parameter Name**	**Yes/No**	**REMARKS**
FRESH WATER	Fresh Water	☐	

Step 10: Click on Save, System will display the ✓ checklist saved X status on the screen.

Step 11: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ⬦ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step12: Once the workflow is initiated click on the icon. System will be display **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to WFAPP

Step13: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step14: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to APPROVED

Step15: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'.

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If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 16: While if there is any changes or error we can cancel the record by clicking the [icon] icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

Alert Message   ✕

ⓘ Do you want to cancel?

                        NO   YES

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

Cancellation   ✕

Reason Description *   ↗

Remarks

Requested By

                    EXIT   PROCEED

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display **Ok** and

status will change to CANCEL

Step 17: Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

≡ 🏢 Sludge Clearance Recording									🔄 🗎
Doc No.	Status	Sludge Clearance Request No.	Recycler Code	Recycler Name	VCN No.	Vessel Name	Registration Category Name	Doc Approved Date	Data Source
🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	📅 search...	🔍 search...

User Interface Image 218- Sludge Clearance Recording 23.5.6

Step 18: Click on [icon] icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

Search ×

Field	Condition	Value1	Value2	Concatenate Condition
˅	˅	search....	search....	and ˅

⊕ Add Row

Clear ✖   Search 🔍

By Clicking on 🔽 can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

28. BUSINESS FUNCTION NAME: Vehicle/Visitor/Company Blacklisting

28.1 DEFINITION:

THE PURPOSE OF THIS FUNCTION IS TO BLACKLIST OF ANY VEHICLE/VISITOR/COMPANY TO DO THE BUSINESS WITH PORT.

28.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ▦ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo→ Others→ Vehicle/Visitor/Company Blacklisting → Click on New button 🗋
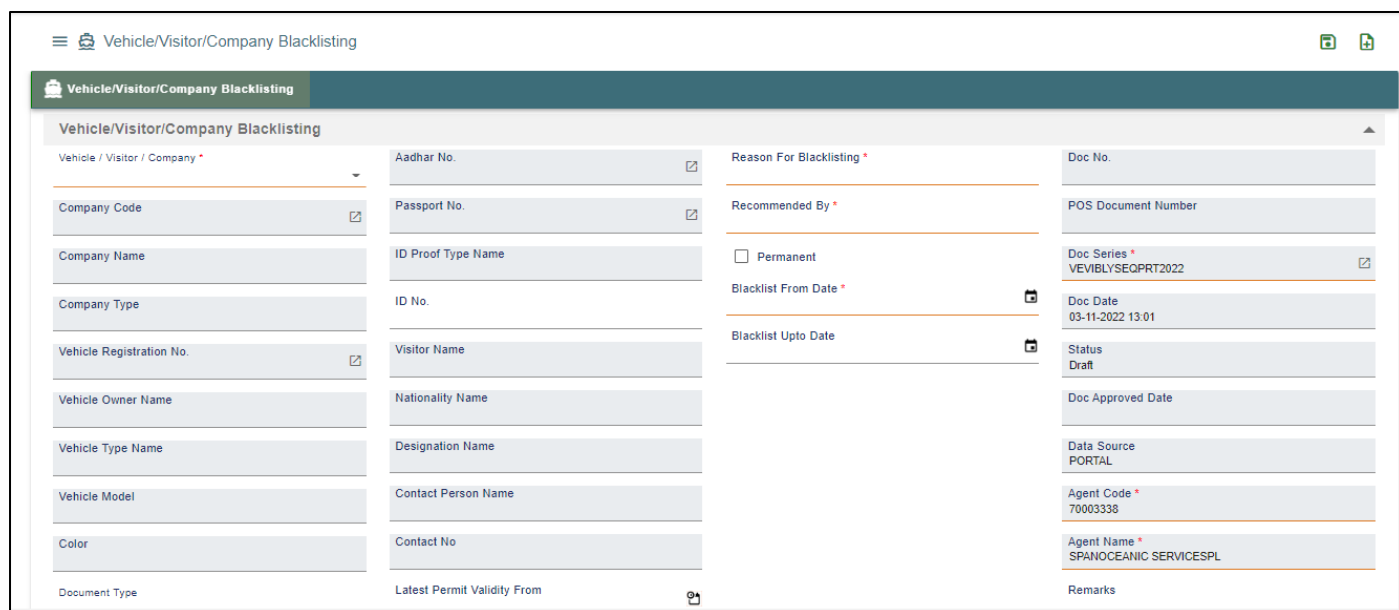
USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

28.3 PREREQUISITES – MASTERS

28.4 SCREENSHOT

Following screenshot from Vehicle/Visitor/Company Blacklisting.

Step 1- Click on New button 🗋 . The user shall redirect to the screen like below-

User Interface Image 359 – Vehicle/Visitor/Company Blacklisting 50.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Vehicle/Visitor/Company Blacklisting Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Vehicle/Visitor/company	Yes	Dropdown
Company Code	Yes	Popup
Company Name	No	Text box
Company Type	No	Text box
Vehicle Regd No.	Yes	Popup
Vehicle Owner Name	No	Text box
Vehicle Type	No	Text box
Vehicle Model	No	Text box
Vehicle Colour	No	Text box
Document Type	Yes	Dropdown
Aadhar No.	Yes	Popup
ID Proof Type	No	Text box
ID Proof No.	No	Text box
Passport No.	Yes	Popup
Visitor Name	No	Text box
Nationality	No	Text box
Designation	No	Text box
Contact Person	No	Text box
Contact No.	No	Text box
Latest Permit Vaidity From	No	Text box
Latest Permit Validity To	No	Text box

Reason for Blacklisting	Yes	Text box
Reccomended By	Yes	Text box
Permanent	No	Checkbox
Blacklist From Date	Yes	Date Picker
Blacklist Upto Date	Yes/No	Date Picker
Remarks	No	Text box

Step 3: Click on the Save button [icon] from the top right corner to save the Form. Once the record got saved successfully, then the system will display ✔ **Record saved** message.

Step 4: After saving the record click on the [icon] icon. Then the user will be redirected to the Attachments Window. –

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 360- Vehicle/Visitor/Company Blacklisting 50.5.2

Step 5: Click on attachment icon if any attachment are configured it will auto populate or Click on **+ Add files** fill the required fields and upload the documents if any through **Upload** button and can download the attached document by clicking on the file name attached.

User Interface Image 361- Vehicle/Visitor/Company Blacklisting 50.5.3

Step 6: Click on attachment icon if any attachment are configured it will auto populate or Click on

`+ Add files` fill the required fields and upload the documents if any through `Upload ⬆` button and can download the attached document by clicking on the file name attached.

Step 7: Configure Check List in Check List Form for respective forms. Then Click on [icon] icon. Configured parameters will display in the Check List Window.

Step 8: Click on Save, System will display the `✓ checklist saved X` status on the screen.

Step 9: Once the record is saved then the document status will be as 'Draft' and then click on workflow button [icon] .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step10: Once the workflow is initiated click on the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE REJECT

Successfully Status changed to WFAPP

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step12: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE REJECT

Successfully Status changed to APPROVED

Step13: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'.

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If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 14: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step 15: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 16: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

Alert Message ✕

ⓘ Do you want to cancel?

NO   YES

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

Cancellation ✕

Reason Description *

Remarks

Requested By

EXIT   PROCEED

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display Ok and status will change to CANCEL

Step 17: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

☰ 🏠 Berth Inspection   ⊕ 🗎

Doc No.	Status	IMO Number	Vessel Name	Arrival D&T	Berth Name	Doc Approved Date	Data Source	Doc Date	Created By	Created Date
search...	search...	search...	search...	search...	search...	search...	search...	search...	search...	search...

User Interface Image 362 – Vehicle/Visitor/Company Blacklisting 50.5.4

Step 18: Click on 🔍 icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

Search   ✕

Field	Condition	Value1	Value2	Concatenate Condition
⌄	⌄	search....	search....	and ⌄

⊕ Add Row

Clear ✕   Search 🔍

By Clicking on 🔻 can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

29. BUSINESS FUNCTION NAME: Blacklisting Releasing

29.1 DEFINITION:

THE PURPOSE OF THIS FUNCTION IS TO RELEASE THE BLACKLIST OF ANY VEHICLE/VISITOR/COMPANY TO DO THE BUSINESS WITH PORT.

29.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo→ Others→ Blacklist Releasing → Click on New button 📄

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

29.3 PREREQUISITES – MASTERS

29.4 SCREENSHOT

Following screenshot from Blacklist Releasing.

Step 1- Click on New button 📄 . The user shall redirect to the screen like below-

User Interface Image 363 – Vessel Inspection 51.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Blacklist Releasing Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Blacklist No.	Yes	Pop Up
Vehicle/Visitor/Company	No	Text Box
Company Code	No	Text Box
Company Name	No	Text Box
Company Type	No	Text Box
Vehicle Regd No.	No	Text Box
Vehicle Owner Name	No	Text Box
Vehicle Type	No	Text Box
Vehicle Model	No	Text Box
Vehicle Colour	No	Text Box
Document Type	No	Text Box
Aadhar No.	No	Text Box
ID Proof Type	No	Text Box
ID Proof No.	No	Text Box
Passport No.	No	Text Box
Visitor Name	No	Text Box
Nationality	No	Text Box
Designation	No	Text Box
Contact Person	No	Text Box
Contact No.	No	Text Box
Latest Permit Vaidity From	No	Date Picker
Latest Permit Validity To	No	Date Picker
Reason for Blacklisting	No	Text Box
Reccomended By	No	Text Box
Permanent	No	Checkbox
Blacklist From Date	No	Date Picker
Blacklist Upto Date	No	Date Picker
Releasing From	Yes	Date Picker
Released By	Yes	Text Box
Penalty Paid (Y/N)	Yes	Dropdown
Remarks	No	Text Box

Step 3: Click on the Save button from the top right corner to save the Form. Once the record got saved

successfully, then the system will display message.

Step 4: After saving the record click on the ⏚ icon. Then the user will be redirected to the Attachments Window. –

Attachments (0) ✕

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 360- Vehicle/Visitor/Company Blacklisting 50.5.2

Step 5: Click on attachment icon if any attachment are configured it will auto populate or Click on **+ Add files** fill the required fields and upload the documents if any through **Upload ⏚** button and can download the attached document by clicking on the file name attached.

Attachments (0) ✕

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 361- Vehicle/Visitor/Company Blacklisting 50.5.3

Step 6: Click on attachment icon if any attachment are configured it will auto populate or Click on **+ Add files** fill the required fields and upload the documents if any through **Upload ⏚** button and can download the attached document by clicking on the file name attached.

Step 7: Configure Check List in Check List Form for respective forms. Then Click on ☷ icon. Configured

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parameters will display in the Check List Window.

Check List				💾 x
Parameter Code	**Parameter Name**	**Yes/No**	**REMARKS**	
FRESH WATER	Fresh Water	☐		

Step 8: Click on Save, System will display the ✓ checklist saved X status on the screen.

Step 9: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ⬦ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step10: Once the workflow is initiated click on ⬦ the icon. System will be display **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ×

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to WFAPP

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'.

269

If user reject the request following alert will display on the screen. **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step12: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE REJECT

Step13: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 14: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE REJECT

Step 15: Once the user Approve the request the **Successfully Status changed to APPROVED** following

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status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 16: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

Alert Message

ⓘ Do you want to cancel?

NO   YES

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

Cancellation

Reason Description *

Remarks

Requested By

EXIT   PROCEED

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display **Ok** and status will change to CANCEL

Step 17: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

Doc No.	Status	IMO Number	Vessel Name	Arrival D&T	Berth Name	Doc Approved Date	Data Source	Doc Date	Created By	Created Date
search...	search...	search...	search...	search...	search...	search...	search...	search...	search...	search...

User Interface Image 362 – Vehicle/Visitor/Company Blacklisting 50.5.4

Step 18: Click on icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

271

By Clicking on can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

30. Business Function Name: Cargo Hold

30.1 Definition:

Port authority can hold the cargo for various reasons. Hold cargo are not allowed for shipment or delivery. Port Authority can use iPortman® application to hold the cargo. Port Official can hold the cargo for various reasons mentioned below

- o Operation Hold
- o Finance Hold
- o Custom Hold
- o Documentation Hold
- o Safety Hold
- o Other Holds

Imported Cargo marked, as "Hold" will not allowed for delivery. Likewise, Export Cargo marked as "Hold" will not be allowed for shipment. Importer/Exporter can request to release the cargo by obtaining clearance on the reason of Holding.

30.2 Navigation

Following navigation path is mentioned from Menu selection to view the list item and add new records.

Menu Path	Menu Bar →Cargo→ Cargo operations → Cargo Hold → Click on New button

User can also search the function in search area available in the header section left side with function name
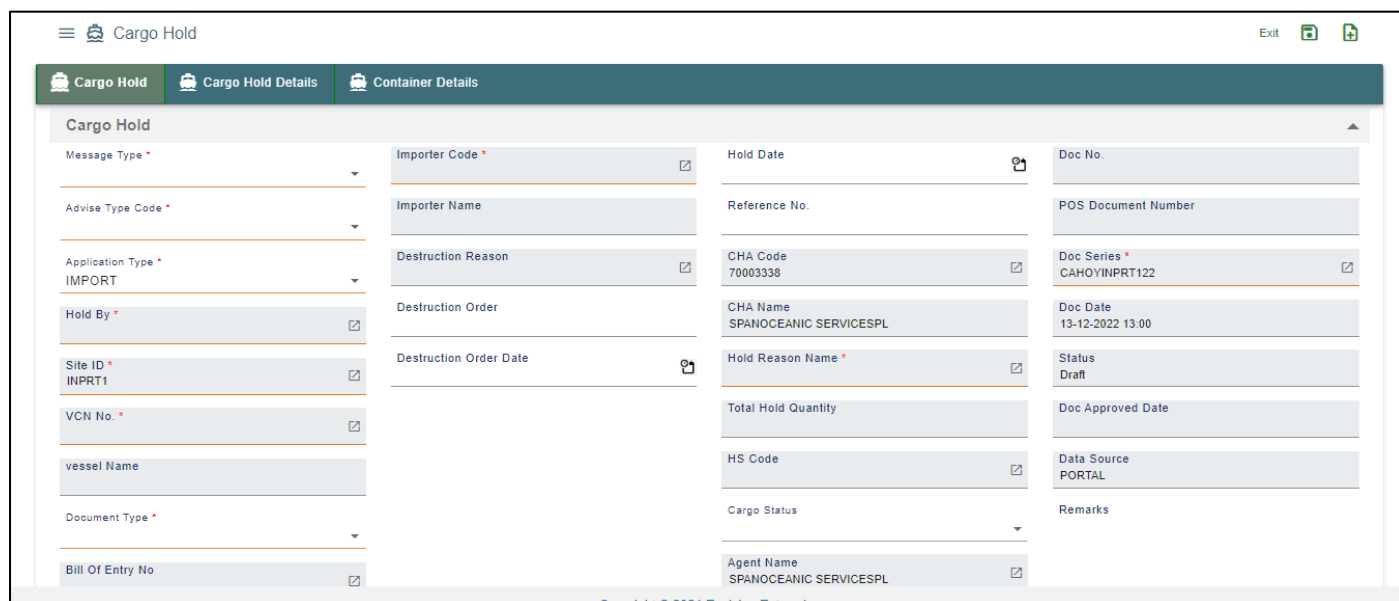
30.3 Prerequisites – Masters

1. Document Type
2. Hold Type
3. Cargo Code
4. Cargo Name
5. UOM

30.4 Screenshots

Following screenshot from Cargo Hold

Step 1- Click on Add new button and Select Application type as "IMPORT".Wewill redirect to screen like below.

User Interface Image 149-Cargo Hold-23.5.1

Below are the Field Information regarding Cargo Hold Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field	Mandatory	Fill Type
Hold/Application Type*	Yes	Dropdown
Hold By*	Yes	Dropdown
Site Id	Yes	text box
Hold Type	Yes	Dropdown
Post Hold Action	No	Dropdown
VCN*	Yes	Popup
Vessel Name	No	Text Box
Document Type*(IGM /Bill of Entry)	Yes	Dropdown
IGM No.	No	Text Box
IGM Date	No	Calendar
Bill of Entry No.	No	Text Box
Bill of Entry Date	No	Calendar
Importer Code*	Yes	Popup
Importer Name	No	Text Box
Exporter Code*	Yes	Popup
Exporter Name	No	Text Box
Shipping Bill No*	Yes	Popup
Shipping Bill Date	No	Calendar
Cargo Type	No	Text Box

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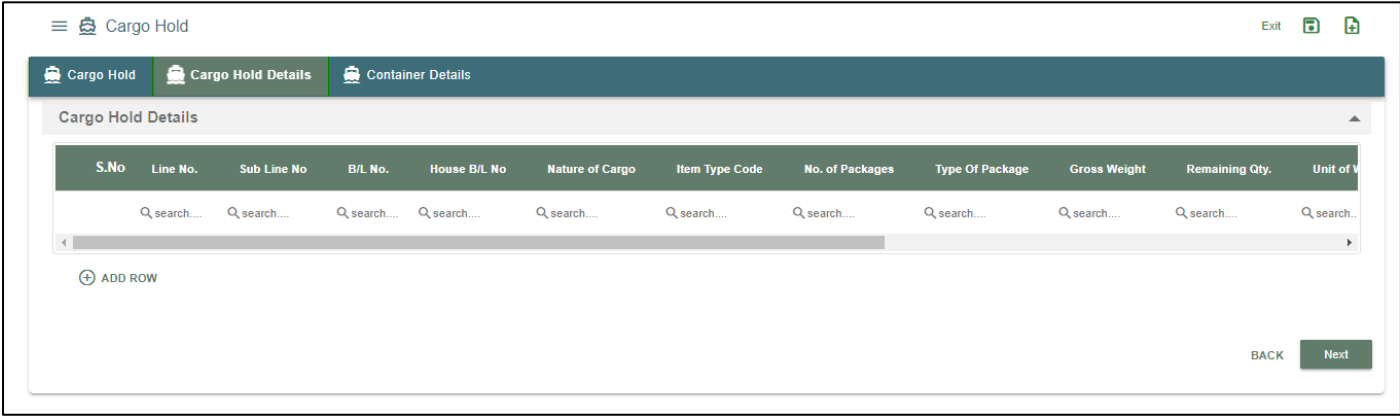
Cargo Code*	Yes	Popup
Cargo Name	No	Text Box
CHA Code*	Yes	Popup
CHA Name	No	Text Box
Hold Reason*	Yes	Text Box
Total Hold Quantity	No	Text Box
Carting Permission Number	Yes	Popup
Confiscation Flag	NO	Dropdown
Confiscation/Hold Date	Yes	Text box
Customs Order release Date (For confiscation)	Yes	Text box
Destruction Reason	No	Text box
Destruction Order	No	Text box
Destruction Order Date	No	Date Picker
Cargo Status	No	Auto fill
Release Date	No	Auto fill
Doc No	No	Text Box
Doc Series	Yes	Dropdown
Doc Date	No	Calendar
Status Code	No	Text Box
Doc Approved Date	No	Calendar
Remarks	No	Text Box

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Step 3: Click ⬚ button from Top Menu Bar to save Cargo Holdform record. Once it is saved Cargo Hold Details will be activated to add Cargo Hold details.
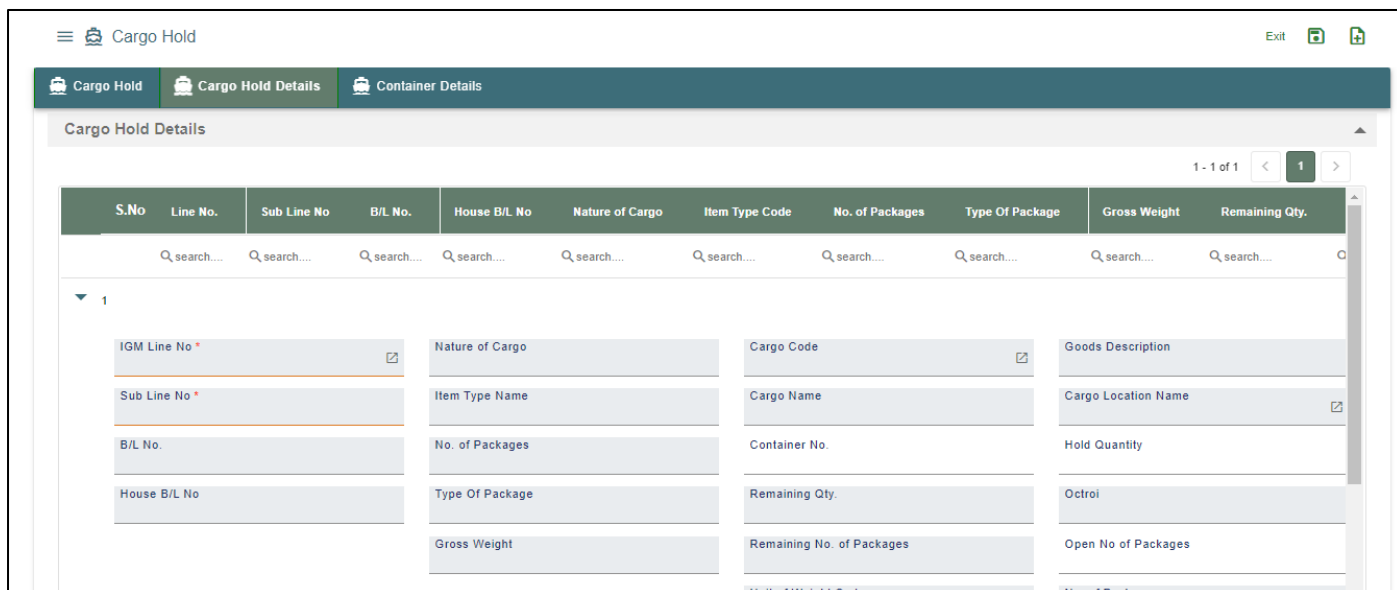
✅ Record saved

Step 4: Once Cargo Hold form are saved, Cargo Hold Details will be activated as below to add Cargo Hold Details as shown in below screen.

User Interface Image 150-Cargo Hold (Cargo Hold Details)-23.5.2(a)

Click on ⊕ Add Row to begin with data entry

User Interface Image 151-Cargo Hold (Cargo Hold Details)-23.5.2(b)
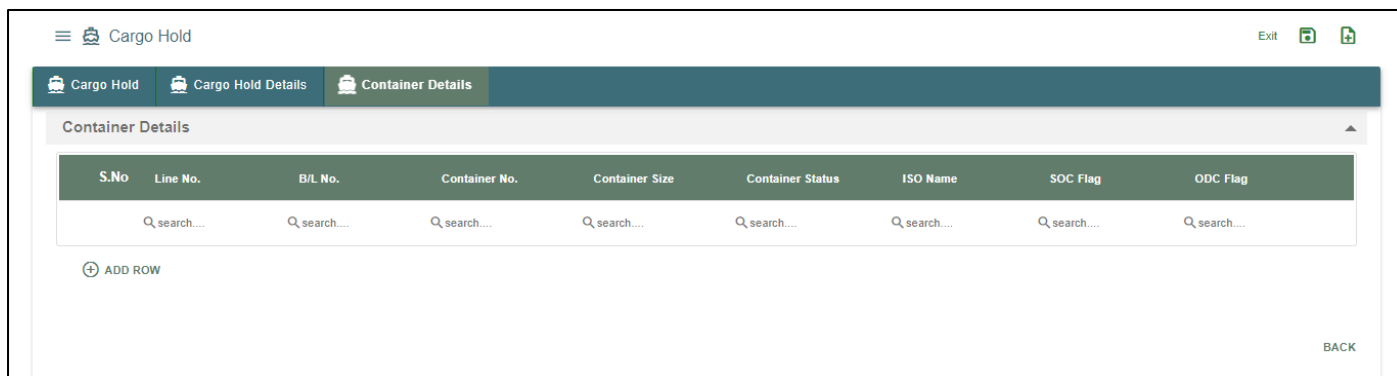
Below are the Field Information regarding Cargo Hold Details Line-Item Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
IGM Line No*	Yes	Popup
Sub Line No	No	Text Box
B/L No	No	Text Box
House B/L No	No	Text Box
Nature of Cargo	No	Text Box
Item Type Name	No	Text Box
No. of Packages	No	Text Box
Type of Package	No	Text Box
Gross Weight	No	Text Box
Cargo Code	No	Pop Up
Cargo Name	No	Text Box
Remaining No. of Packages	No	Text Box
Hold Quantity	No	Text Box
Open Qty	No	Text Box
Hold No. of Packages	No	Text Box
Open No. of Packages	No	Text Box
Post Hold Action	No	DropDown
CIF Value	No	Text Box
Gross Volume	No	Text Box
Marks and Numbers	No	Text Box
Goods Description	No	Text Box
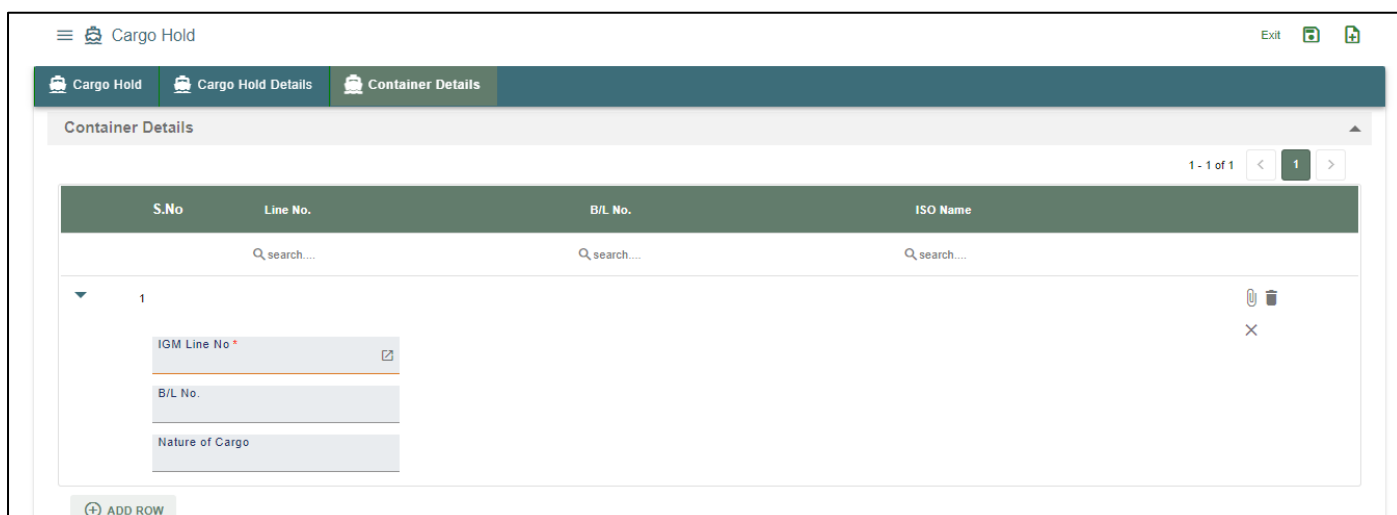
Step 5: Once Cargo Hold form are saved, Container Details will be activated as below to add Container Details as shown in below screen.

User Interface Image 152-Cargo Hold (Container Details)-23.5.3(a)

Click on ⊕ Add Row to begin with data entry

User Interface Image 153-Cargo Hold (Container Details)-23.5.3(b)

Below are the Field Information regarding Container Details Line-Item Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
SB Item No*	Yes	Popup
Container No	No	Pop Up
Container Size'	No	Text Box
Container Status	No	Text Box
ISO Code	No	Text Box
SOC Flag	No	Text Box
ODC Flag	NO	Text Box

button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ↑] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [📎] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [📎] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

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Attachments (2)   ✕

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☐ 1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐ 2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ↥   **Close ✕**

Now Click on the Check boxes accordingly, then   Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (2)   ✕

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☑ 1.	Cargo Related Documents	International Load Line Certificate				*File Required
☑ 2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ↥   **Close ✕**

Once all the mandatory and required fields are filled then Click on   Upload ↥   button. System will display

the status   **File uploaded**   on the screen.
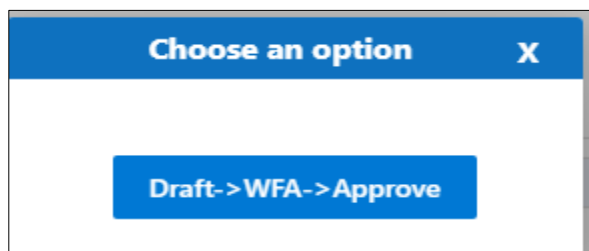
Click On Close Button

Click on the Save button [icon] from the top right corner to save Form. Once the record got saved successfully, then the system will

display message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button [icon].

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on [icon] the icon. System will be display

 with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .
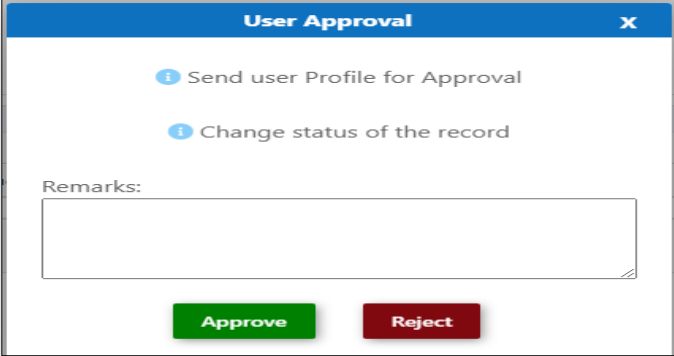
Successfully rejected.

If user reject the request following alert will display on the screen. And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

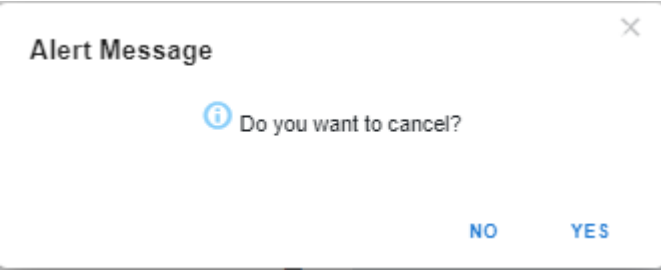**Successfully Status changed to APPROVED**

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the icon shown. After clicking the icon

system will display **Confirmation required** with below alert ok and Back
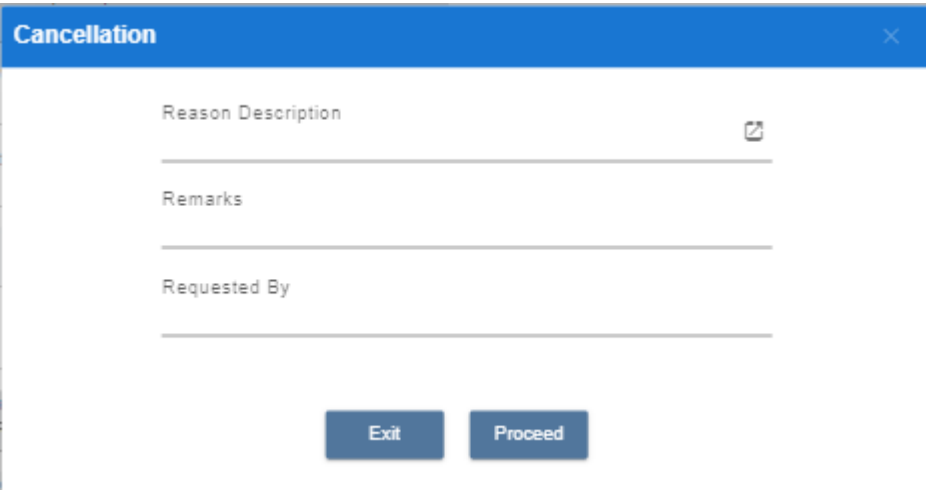
Alert Message   ×

ⓘ Do you want to cancel?

NO   YES

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

Cancellation   ×

Reason Description   ☐
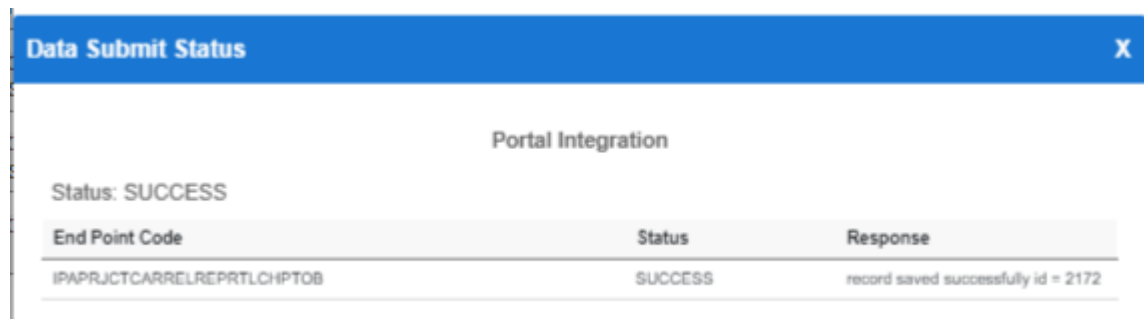
Remarks

Requested By

Exit   Proceed

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display `Ok` and status will change to CANCEL

By Clicking on ⊘ we can view the status of the record or displays no history data found

Data Submit Status   X

Portal Integration

Status: SUCCESS

End Point Code	Status	Response
IPAPRJCTCARHOLPRTLCHPTOB	SUCCESS	record saved successfully id = 1137
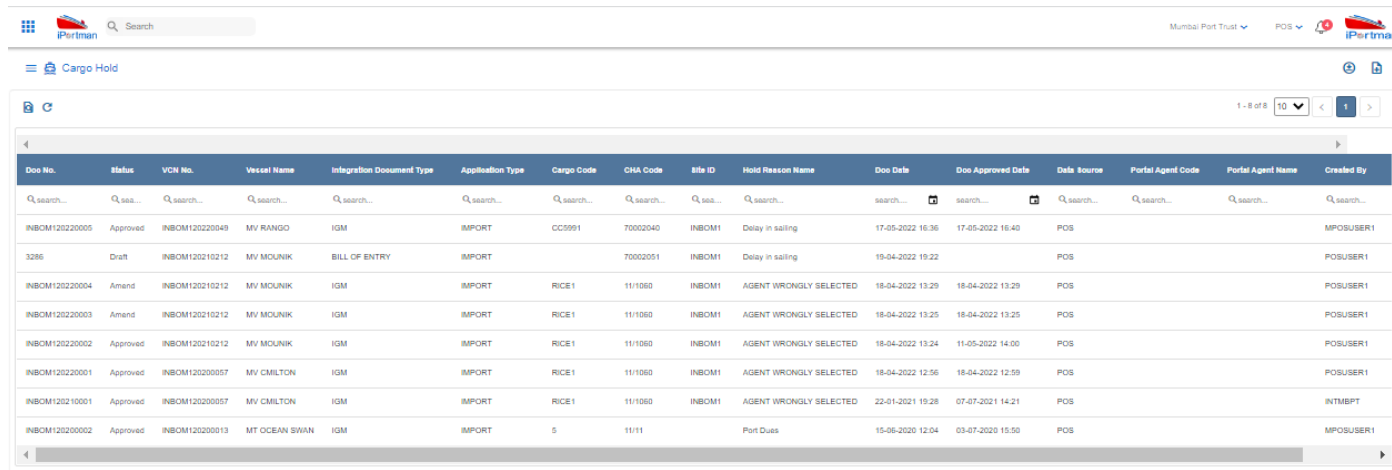
Pos Integration

Status: SUCCESS

End Point Code	Status	Response
IPAPRJCTCARHOLSAP	SUCCESS	{ "status":"message received" }

Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 156-Cargo Hold (List Data)-23.5.5

31. Business Function Name: Cargo Release Request

31.1 Definition:

In this function the Customer Request to release the Cargo which has been hold by the Port for Various Reasons.

- Importer/Exporter or CHA logs in to iPortman® Portal to submit the request for "Cargo Release" by providing the details.
- Importer/Exporter or CHA attaches required documents as a proof of clearance.
- Submitted request will be available in iPortman Web Application for review and approval.

31.2 Navigation

Following navigation path is mentioned from Menu [icon] selection to view the list item and add new records.

Menu Path	Menu Bar →Cargo→ Requests→ Cargo Release Request→ Click on New button

User can also search the function in search area [icon] available in the header section left side with function name.
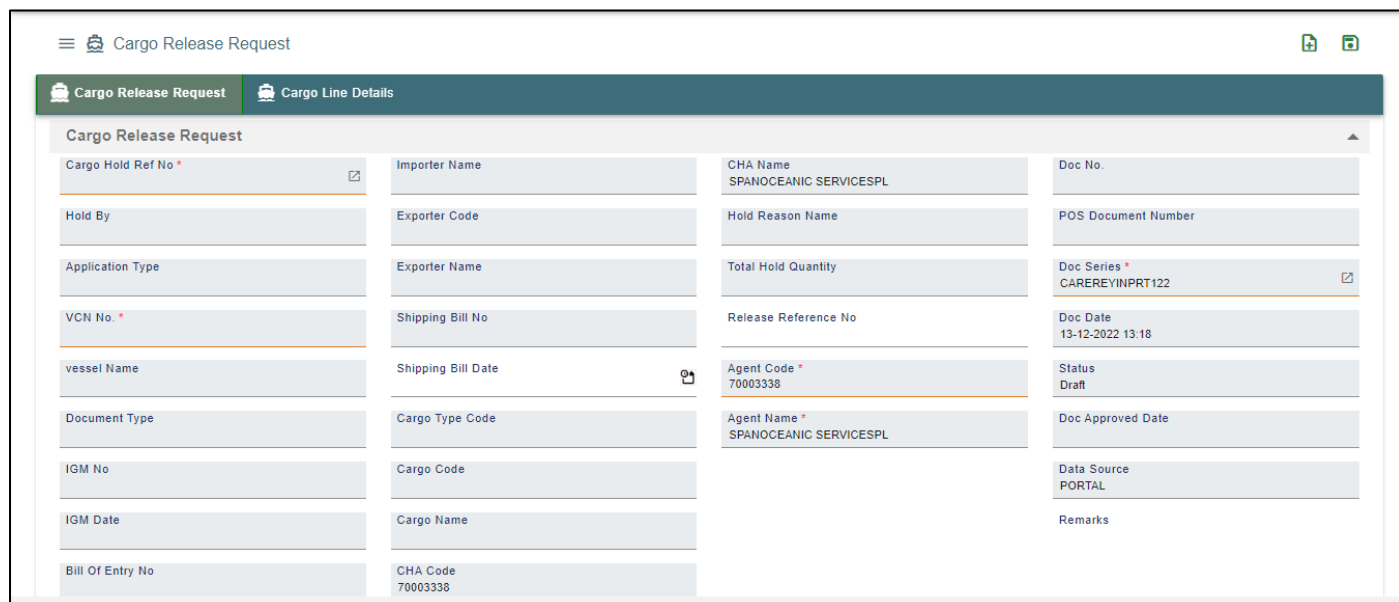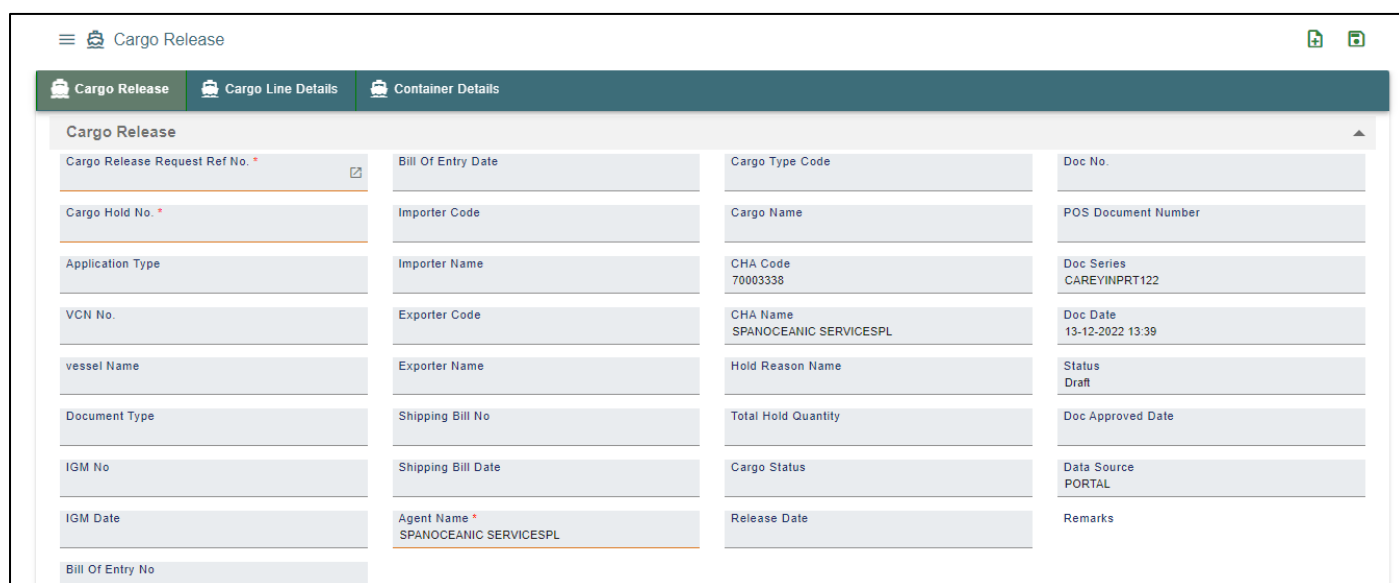
31.3 Prerequisites – Masters

1. Document Type
2. Hold Type
3. Cargo Code
4. Cargo Name
5. UOM

31.4   Screenshots

Following screenshot from Cargo Release Request

Step 1- Click on Add new button ![icon] .We will redirect to screen like below.

User Interface Image 157-Cargo Release Request-24.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

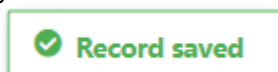Below are the Field Information regarding Cargo Release Request Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

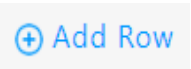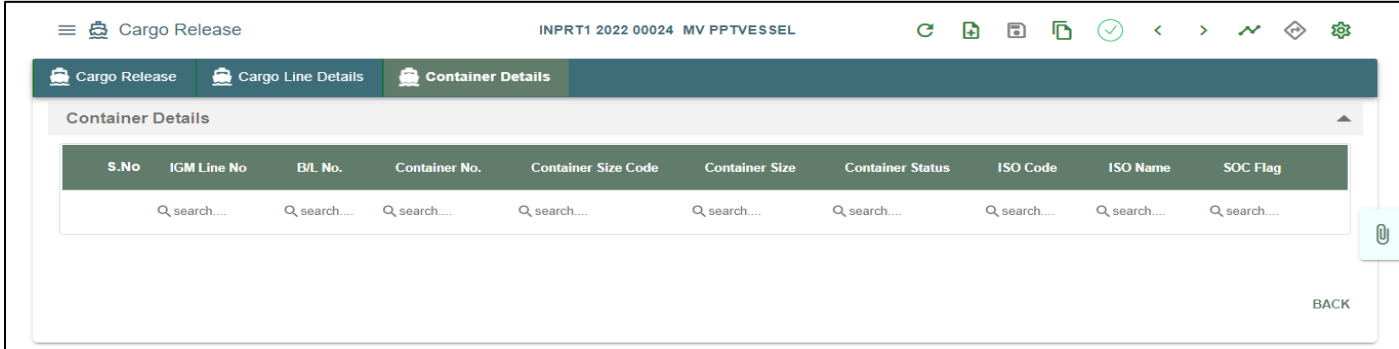| Field	Mandatory	Fill Type
Cargo Hold Reference No*	Yes	Popup
Hold By	No	Text Box
Application Type	No	Text Box
VCN	No	Text Box
Vessel Name	No	Text Box
Document Type(IGM /Bill of Entry)	No	Text Box
IGM No.	No	Text Box
IGM Date	No	Text Box
Bill of Entry No.	No	Text Box
Bill of Entry Date	No	Text Box
Importer Code	No	Text Box
Importer Name	No	Text Box
Exporter Code	No	Text Box
Exporter Name	No	Text Box
Shipping Bill No	No	Text Box
Shipping Bill Date	No	Text Box
Cargo Type	No	Text Box
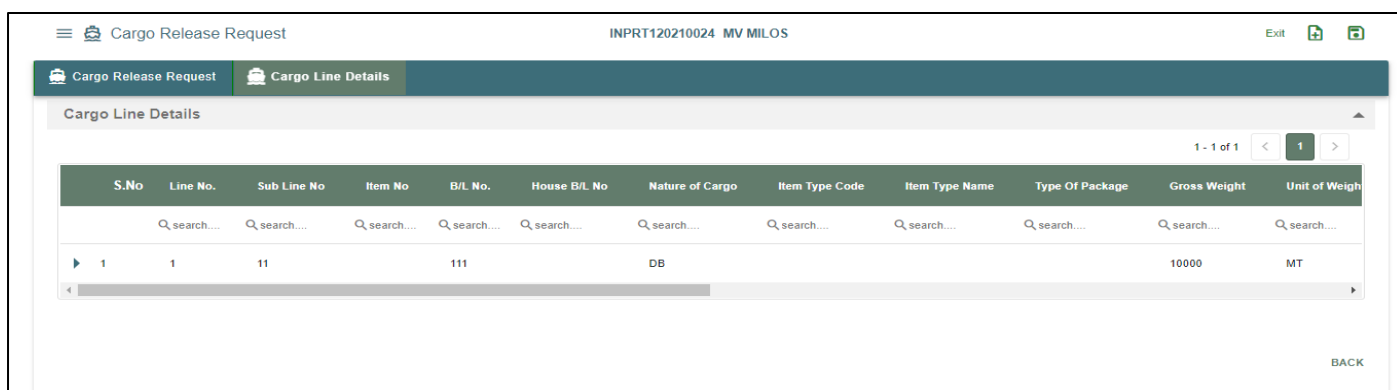
Cargo Code	No	Text Box
Cargo Name	No	Text Box
CHA Code	No	Text Box
CHA Name	No	Text Box
Hold Reason	No	Text Box
Total Hold Quantity	No	Text Box
Cargo Status	No	Text Box
Doc No	No	Text Box
Doc Series	Yes	Dropdown
Doc Date	No	Calendar
Status Code	No	Text Box
Doc Approved Date	No	Calendar
Remarks	No	Text Box

Step 3: Click button from Top Menu Bar to save Cargo Release Request form record. Once it is saved Cargo Line Details will be activated to add Cargo Line details.
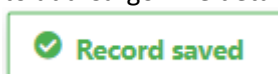
Step 4: Once Cargo Release Request form are saved, Cargo Line Details will be activated as below to add Cargo Line Details as shown in below screen.

User Interface Image 158-Cargo Release Request (Cargo Line Details)-24.5.2(a)

User Interface Image 159-Cargo Release Request (Cargo Line Details)-24.5.2(b)

Step 5: Once data is filled in Cargo Line Details, click on save button and click on ⊕ Add Row if need to add multiple Row's or else click on button.

Below are the Field Information regarding Cargo Line Details Section.

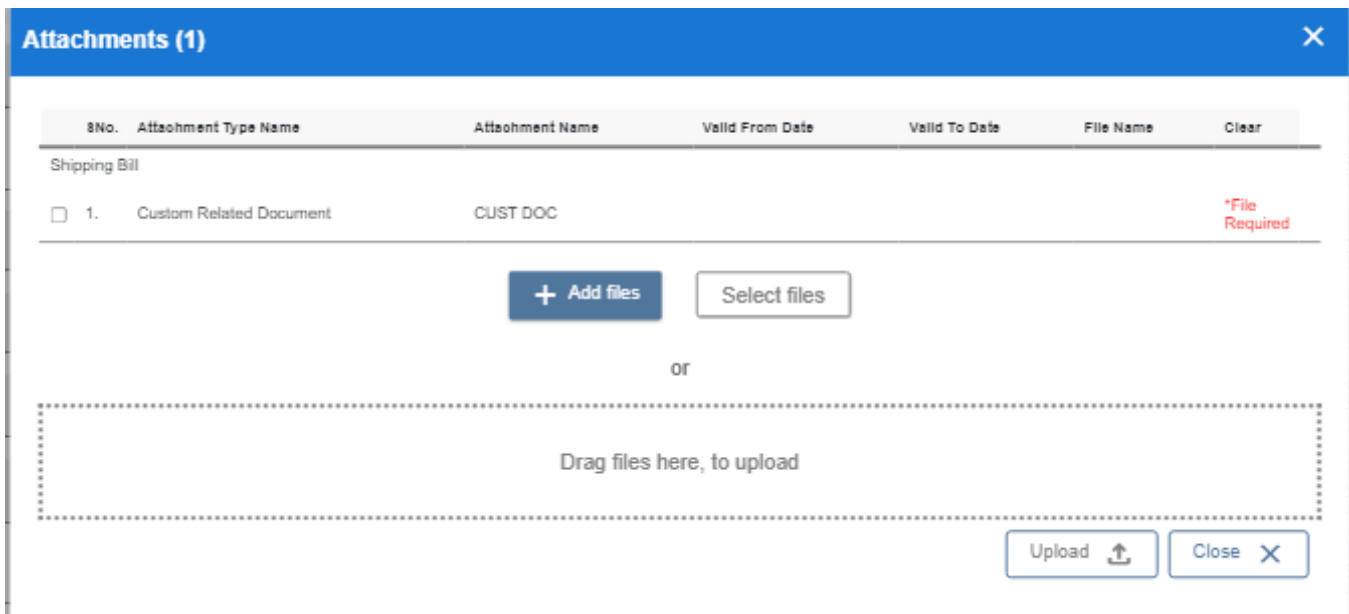(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
IGM Line No/SB Item No	Yes	Text Box
Sub Line No	No	Text Box
B/L No	No	Text Box
House B/L No	No	Text Box
Nature of Cargo	No	Text Box
Container No	No	Text Box
Item Type	No	Text Box
No. of Packages	No	Text Box
Type of Package	No	Text Box
Gross Weight	No	Text Box
Unit of Weight	No	Text Box
Gross Volume	No	Text Box
Unit of Volume	No	Text Box
Marks & Number	No	Text Box
Goods Description	No	Text Box
Hold Quantity	No	Text Box
Requested Release Quantity*	Yes	Text Box
Released Quantity	No	Text Box

button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on Upload ⬆ button. System will display File uploaded status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using 📎 icon system will display respective section name.

Attachments (1)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Custom Related Document	CUST DOC				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

If the Attachment's are configured, System will display like below when we click on 📎 icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Attachments (2)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

Now Click on the Check boxes accordingly, then Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display the status [File uploaded] on the screen.

Click On Close Button

Click on the Save button [icon] from the top right corner to save Form. Once the record got saved successfully, then the system will display [✓ Record saved] message.

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Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button   .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on   the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step9: Once the user Approve the request the following   **Successfully Status changed to WFAPP**   status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on   the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon

system will display **Confirmation required** with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to

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CANCEL

By Clicking on [✓] displays Status

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 162-Cargo Release Request(List Data)-24.5.4

32. Business Function Name: Cargo Release

32.1 Definition

This Objective of this function is to generate Cargo Release for Cargo release request which are requested by the customer through Portal.

32.2 Navigation

Following navigation path is mentioned from Menu ⊞ selection to view the list item and add new records.

Menu Path	Menu Bar →Cargo→ Cargo Operations → Cargo Release → Click on New button

User can also search the function in search area 🔍 available in the header section left side with function name

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32.3   Prerequisites – Masters

1. Document Type
2. Hold Type
3. Cargo Code
4. Cargo Name
5. UOM

32.4   Screenshot

Following screenshot from Cargo Release.

Step 1- Click on New button .We will redirect to screen like below.

User Interface Image 163-Cargo Release-25.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Cargo Release Details Section.

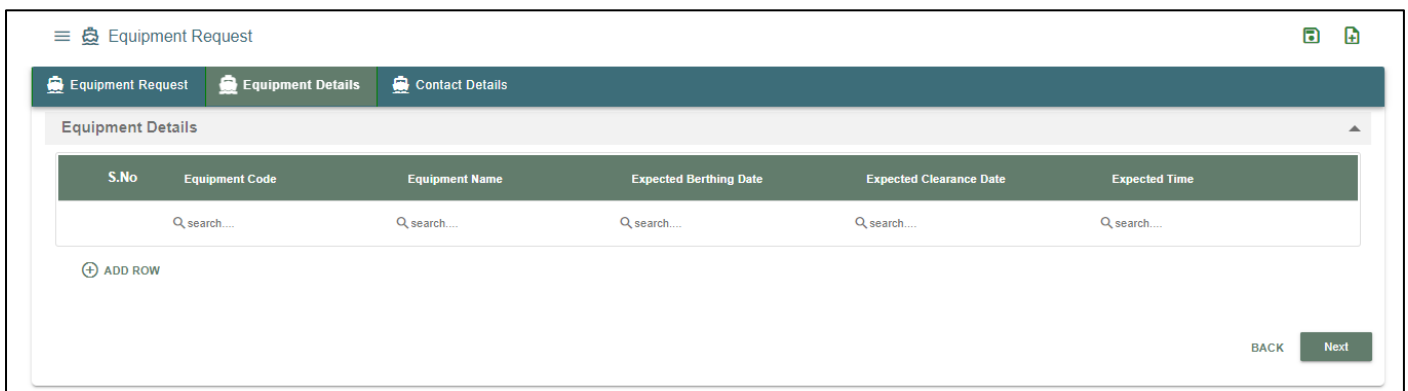(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

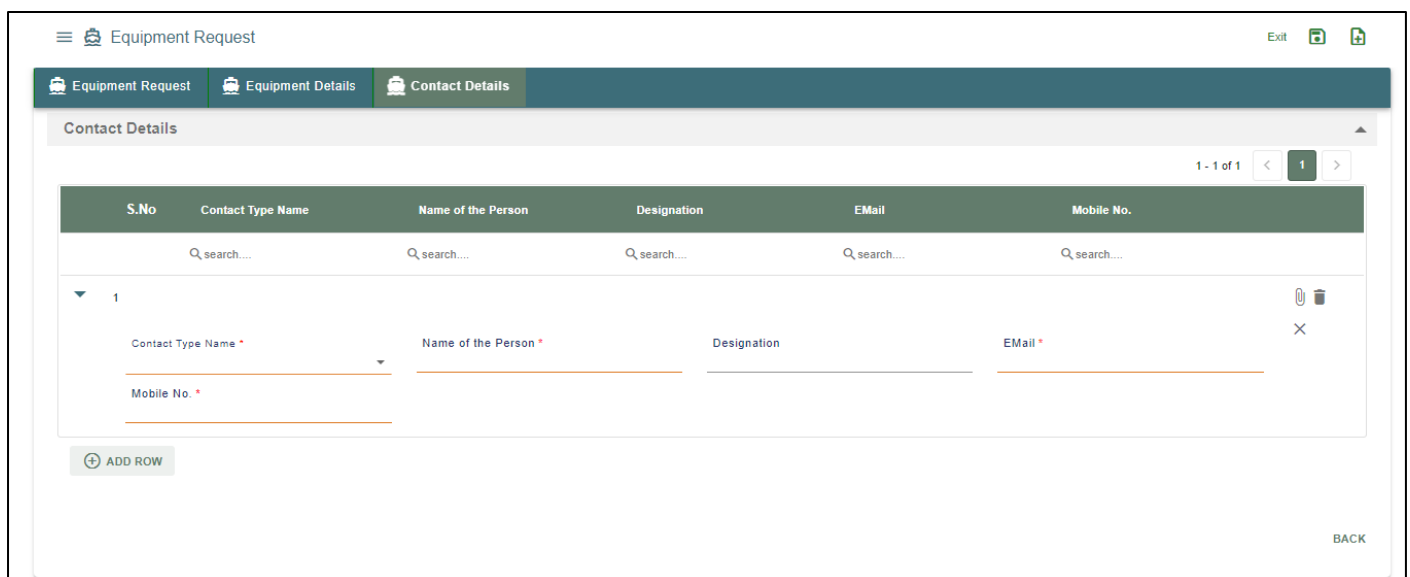| Field	Mandatory	Fill Type
Cargo Release Request Reference No*	Yes	LOV
Cargo Hold No*	Yes	Textbox
VCN	No	Text Box
Vessel Name	No	Text Box
Document Type(IGM /Bill of Entry)	No	Text Box
IGM No.	No	Text Box
IGM Date	No	Text Box
Bill of Entry No.	No	Text Box
Bill of Entry Date	No	Text Box
Importer Code	No	Text Box
Importer Name	No	Text Box

Exporter Code	No	Text Box
Exporter Name	No	Text Box
Shipping Bill No	No	Text Box
Shipping Bill Date	No	Text Box
Cargo Type	No	Text Box
Cargo Code	No	Text Box
Cargo Name	No	Text Box
CHA Code	No	Text Box
CHA Name	No	Text Box
Hold Reason	No	Text Box
Total Hold Quantity	No	Text Box
Cargo Status	No	Text Box
Release Date	No	Text Box
Doc No	No	Text Box
Doc Series	Yes	Dropdown
Doc Date	No	Calendar
Status Code	No	Text Box
Doc Approved Date	No	Calendar
Remarks	No	Text Box

Step 3: Click button from Top Menu Bar to save Cargo Release form record. Once it is saved Cargo Line Details will be activated to add Cargo Line details.
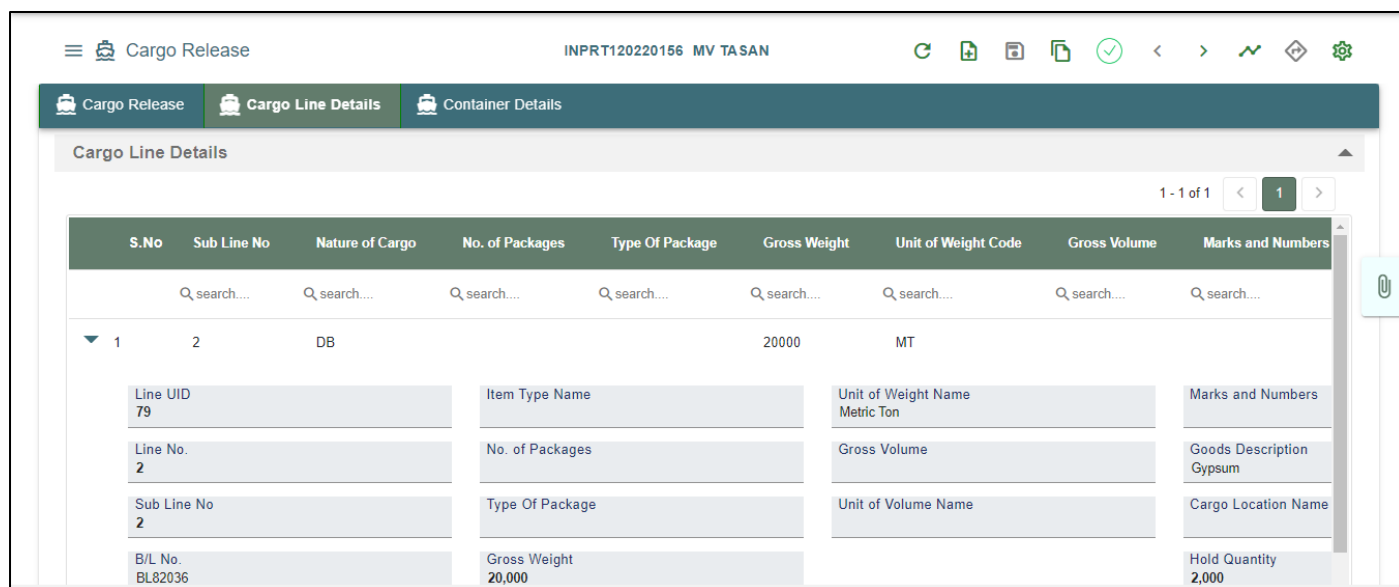
Step 4: Once Cargo Release form are saved, Cargo Line Details will be activated as below to add Cargo Line Details as shown in below screen.

Click on to begin with data entry

User Interface Image 164-Cargo Release(Cargo Line Details)-25.5.2

Below are the Field Information regarding Cargo Line Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
IGM Line No/SB Item No	No	Text Box
Sub Line No	No	Text Box
B/L No	No	Text Box
House B/L No	No	Text Box
Nature of Cargo	No	Text Box
Item Type	No	Text Box
No. of Packages	No	Text Box
Type of Package	No	Text Box
Gross Weight	No	Text Box
Unit of Weight	No	Text Box
Gross Volume	No	Text Box
Unit of Volume	No	Text Box
Marks & Number	No	Text Box
Goods Description	No	Text Box
Hold Quantity	No	Text Box
Requested Release Quantity	No	Text Box
Release Quantity*	Yes	Text Box
Hold No. Of Packages	No	Text Box
Requested No. Of Packages	No	Text Box
IGM Line No	No	Text Box
B/L No	No	Text Box
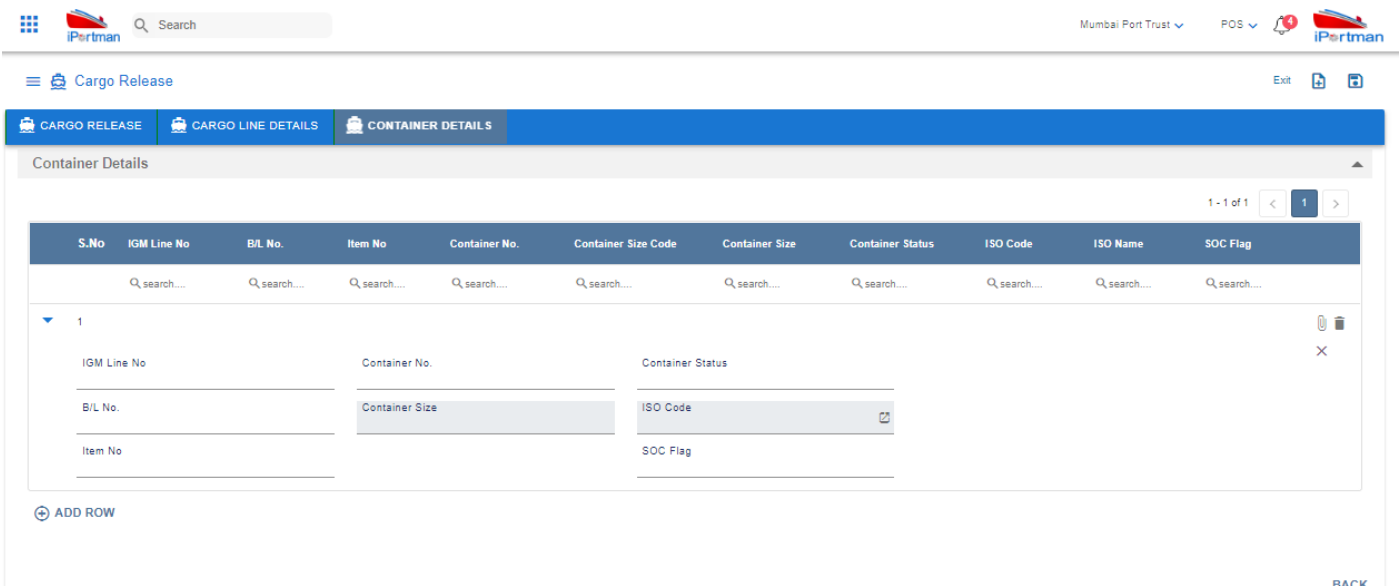
SB Item No	No	Text Box

Step 5: Once data is filled in Cargo Line Details, click on save button and click on Add Row if need to add multiple Row's or else click on button.

Once Cargo line form are saved, Container Line Details will be activated as below to add Container Line Details as shown in below screen.

Click on Add Row to begin with data entry

Below are the Field Information regarding Cargo Line Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field name	Mandatory	Fill Type
Container No	No	Pop Up
Container Size'	No	Text Box
Container Status	No	Text Box
ISO Code	No	Text Box
SOC Flag	No	Text Box

button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.Once all the mandatory and required fields are filled then Click on [Upload] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [paperclip] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [paperclip] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Attachments (2)

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☐ 1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐ 2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Attachments (2)

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☑ 1.	Cargo Related Documents	International Load Line Certificate				*File Required
☑ 2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display the status [**File uploaded**] on the screen.

Click On Close Button

Click on the Save button from the top right corner to save Form. Once the record got saved successfully, then the system will

display message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on the icon. System will be display

 with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval ✕

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[   ]

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following   status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. Successfully rejected. And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on ◈ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[   ]

Approve   **Reject**

Successfully Status changed to APPROVED

Step11: Once the user Approve the request the   following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. Successfully rejected. And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon

system will display Confirmation required with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 167-Cargo Release (List Data)-25.5.4

33. BUSINESS FUNCTION NAME: EQUIPMENT REQUEST

33.1   DEFINITION:

Equipment Request is for requesting port for allocating HMC for Loading & Discharge of cargo from Vessel.

33.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⠿ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar →Labor Planning→ Equipment Request→ Click on New button
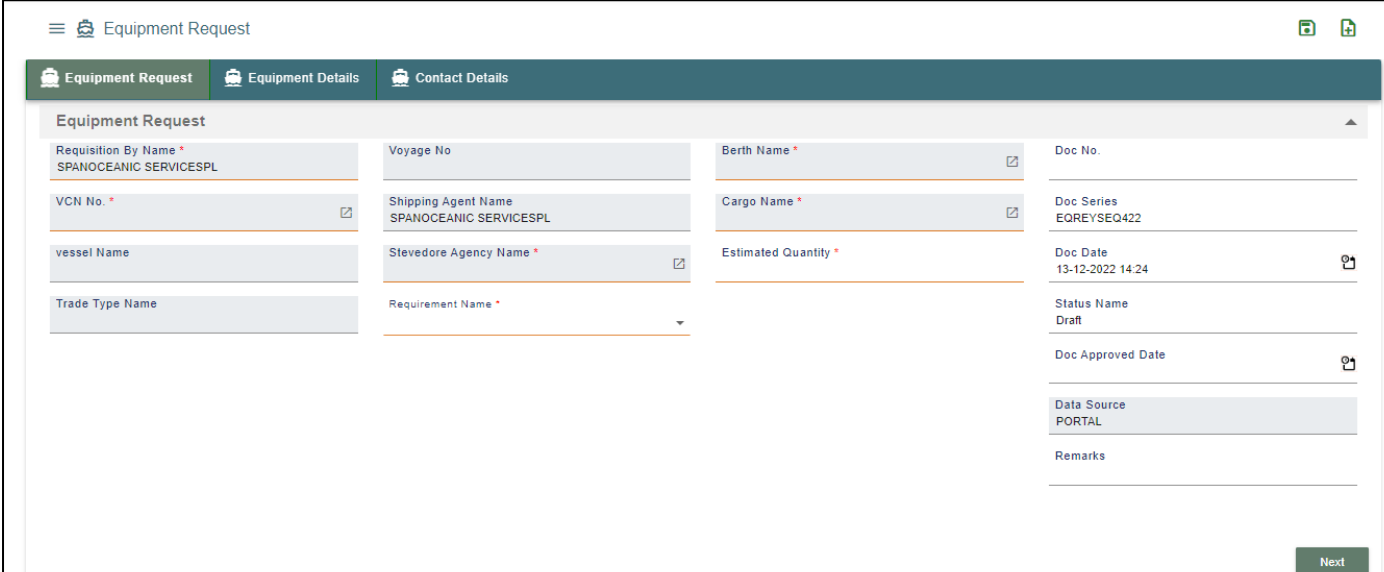
USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

33.3   PREREQUISITES – MASTERS

33.4   SCREENSHOT

Following Screenshots are from Equipment Request.

Step 1- Click on New button and We will redirect to screen like below.

User Interface Image 59-Equipment Request - 9.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Equipment Request Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Step 3: Click ⊞ button from Top Menu Bar to save Header Details form record. Once it is saved Equipment Details section will be activated.

Step 4: Click ⊞ button from Top Menu Bar to save Header Details form record. Once it is saved Equipment Details section will be activated.

User Interface Image 59-Equipment Request 9.5.2(a)

Click on ⊕ Add Row to begin with data entry

User Interface Image 59-Equipment Request 9.5.2(b)

Below are the Field Information regarding Equipment Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Step 5: Click Next button from below of the Page user will move to Contact Details Section like Below.

User Interface Image 59-Equipment Request 9.5.2(a)

Click on ⊕ Add Row to begin with data entry

User Interface Image 59-Equipment Request 9.5.2(b)

Step 5: Once data is filled in Contact Details, click on save button and click on ⊕ Add Row if need to add multiple Row's or else click on button.

Adding the files manually once the record got saved, Click on the icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on Upload ↥ button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using 📎 icon system will display respective section name.

Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Draft Survey							
☐	1.		Survey Report 1 ⌄				*File Required

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

If the Attachment's are configured, System will display like below when we click on 📎 icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

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Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Draft Survey							
☐	1.		Survey Report 1 ⌄				*File Required

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Draft Survey							
☐	1.		Survey Report 1 ⌄				*File Required

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display the status [**File uploaded**] on the screen.

Click On Close Button

Click on the Save button ⬜ from the top right corner to save Form. Once the record got saved successfully, then the system will display

message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◇ .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on ◇ the icon. System will be display

 with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

Successfully rejected.

If user reject the request following alert will display on the screen. And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to APPROVED

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

Successfully rejected.

display on the screen. And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon

system will display **Confirmation required** with below alert ok and Back

Alert Message   ×

ⓘ Do you want to cancel?

NO   YES

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

Cancellation   ×

Reason Description ⬈

Remarks

Requested By

Exit   Proceed

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

34. BUSINESS FUNCTION NAME: REQUEST BASED EQUIPMENT ALLOCATION

34.1 DEFINITION:

Based on Agent Equipment for allocating HMC for Loading & Discharge of cargo from Vessel. Port will Allocating Equipment to the ship.

34.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	**Menu Bar →Labor Planning→ Request Based Equipment Allocation→ Click on New button** 🗋

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

34.3   PREREQUISITES – MASTERS

34.4   SCREENSHOT

Following Screenshots are from Request Based Equipment Allocation.

Step 1- Click on New button and We will redirect to screen like below.

User Interface Image 59- Request Based Equipment Allocation **- 9.5.1**

Step 2:- Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Request Based Equipment Allocation Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Step 3: Click button from Top Menu Bar to save Header Details form record. Once it is saved Equipment Details section will be activated.

Step 4: Click button from Top Menu Bar to save Header Details form record. Once it is saved Equipment Details section will be activated.

User Interface Image 59- Request Based Equipment Allocation **- 9.5.1**

Click on ⊕ Add Row to begin with data entry
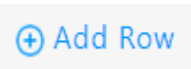
User Interface Image 59- Request Based Equipment Allocation **- 9.5.1**

Below are the Field Information regarding Equipment Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Step 5: Once data is filled in Contact Details, click on save button and click on ⊕ Add Row if need to add multiple Row's or else click on button.

Adding the files manually once the record got saved, Click on the icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload ⬆** button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using 📎 icon system will display respective section name.

Attachments (1) ✕

	SNo.	Attachment Type Name	Attachment Name		Valid From Date	Valid To Date	File Name	Clear
Draft Survey								
☐	1.		Survey Report 1	⌄				*File Required

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

If the Attachment's are configured, System will display like below when we click on 📎 icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display the status [File uploaded] on the screen.

Click On Close Button

Click on the Save button ![save icon] from the top right corner to save Form. Once the record got saved successfully, then the system will display ![Record saved] message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ![icon] .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on ![icon] the icon. System will be display

![Send user Profile for Approval] with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step9: Once the user Approve the request the following ~~Successfully Status changed to WFAPP~~ status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. ~~Successfully rejected.~~ And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

~~Send user Profile for Approval~~ with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the ~~Successfully Status changed to APPROVED~~ following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. ~~Successfully rejected.~~ And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon

system will display ~~Confirmation required~~ with below alert ok and Back

Alert Message   ✕

ⓘ Do you want to cancel?

                                        NO   YES

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

Cancellation   ✕

Reason Description   ⬀
_____

Remarks
_____

Requested By
_____

                        Exit   Proceed

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

35. BUSINESS FUNCTION NAME: STOCK ACCOUNTAL

35.1   DEFINITION:

This Function is for know How Much stock availed for Particular Party, Plot, VCN, IGM etc.

35.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⚏ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo→ Export Documentation → Stock Accountal → Click on **Add New** ⎙

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.
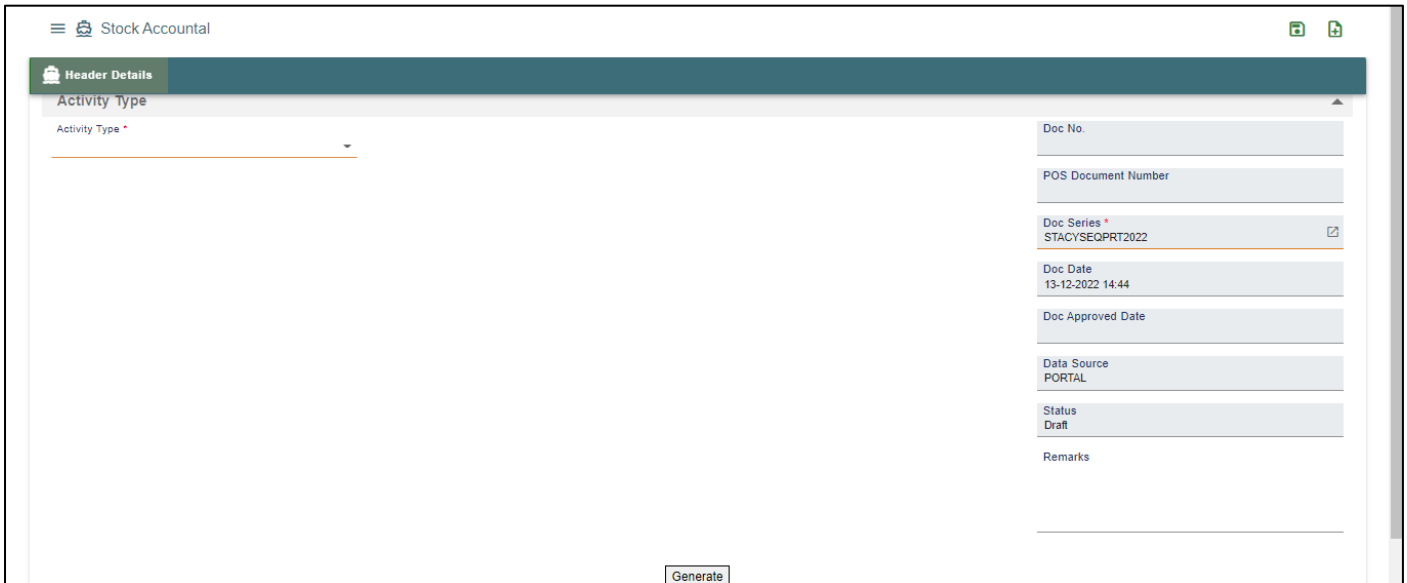
35.3   PREREQUISITES – MASTERS

35.4   SCREENSHOT

Following Screenshots are from Stock Accountal.

Step 1- Click on New button [icon] and We will redirect to screen like below.

User Interface Image 59- Stock Accountal - **9.5.1**

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Stock Accountal Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Step 3: Click [icon] button from Top Menu Bar to save Header Details form record. Once it is saved Cargo & Container Stock report section will be activated.

Step 4: Click [icon] button from Top Menu Bar to save Header Details form record. Once it is saved Cargo & Container Stock report section will be activated.

User Interface Image 59- Stock Accountal - **9.5.1**

Below are the Field Information regarding Cargo & Container Stock report Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Step 5: Once data is filled in Contact Details, click on save button and click on Add Row if need to add multiple Row's or else click on button.

Adding the files manually once the record got saved, Click on the icon. Then the user will be redirected to the popup window as below –

Click on + Add files button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on Upload button. System will display File uploaded status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Now Click on the Check boxes accordingly, then Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display the status [File uploaded] on the screen.

Click On Close Button

Click on the Save button [icon] from the top right corner to save Form. Once the record got saved successfully, then the system will display [✓ Record saved] message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button   .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on   the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following   status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on   the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the icon shown. After clicking the icon system will display with below alert ok and Back
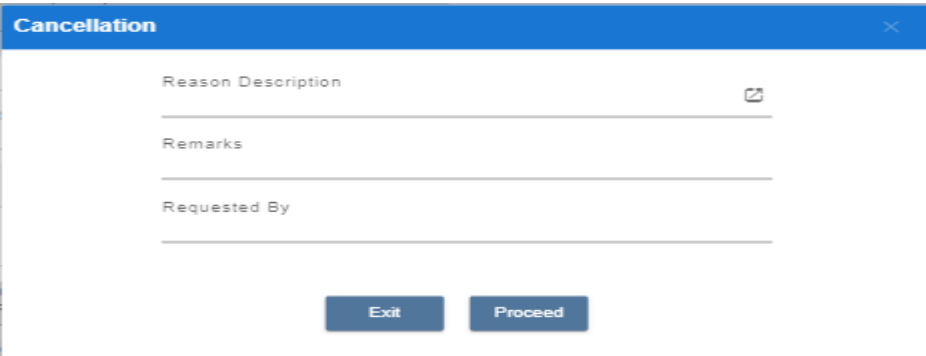

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display and status will change to CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

36. BUSINESS FUNCTION NAME: STOCK APPLICATION

36.1   DEFINITION:

This Function is for know How Much stock availed for Particular Party, Plot, VCN, IGM etc.

36.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⚏ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo→ Export Documentation → Stock Application → Click on **Add New** 🗋

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.
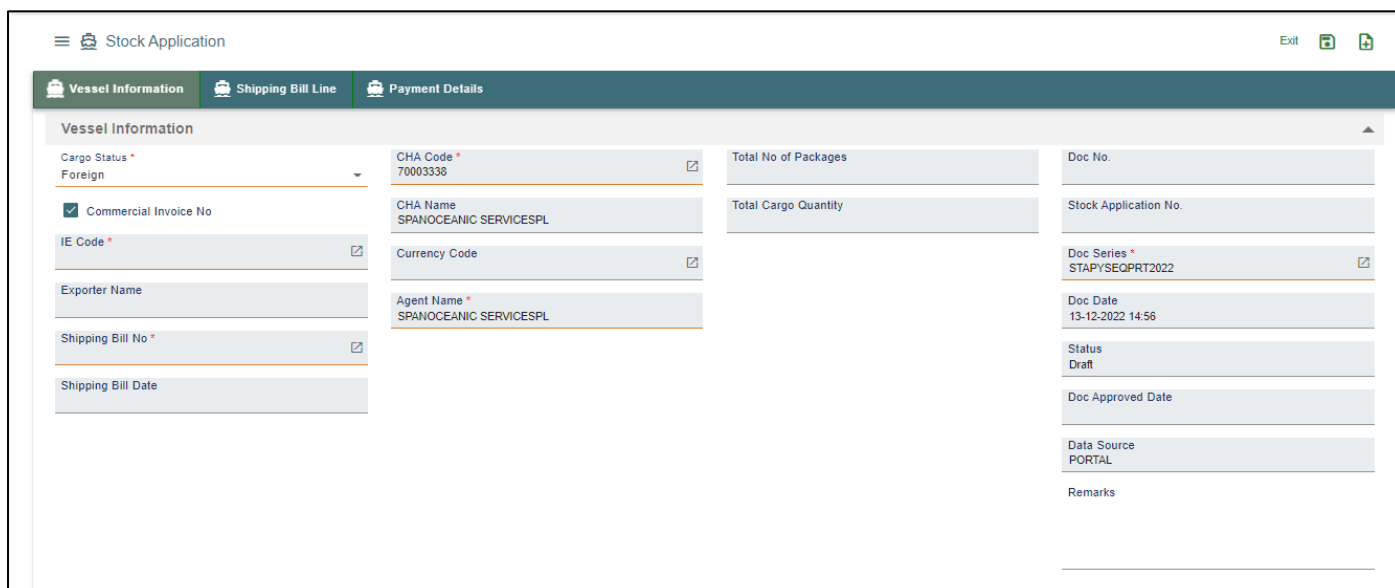
36.3   PREREQUISITES – MASTERS

1. Agent Master
2. Berth Master
3. Currency Master
4. Zone Master

36.4   SCREENSHOT

Following Screenshots are from Stock Application.

Step 1- Click on New button 🗋 and We will redirect to screen like below.

User Interface Image 59- Stock Application - **9.5.1**

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.
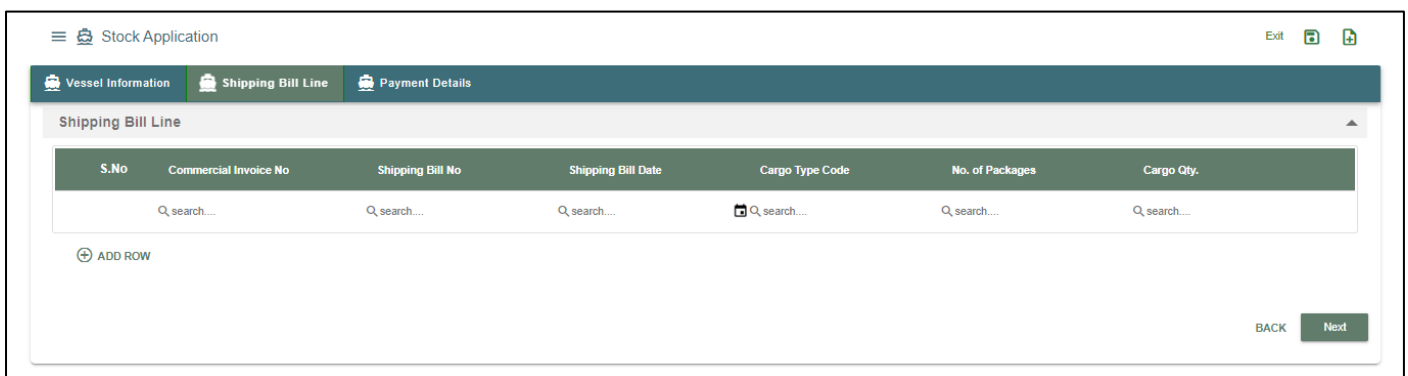
Below are the Field Information regarding Stock Application Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)
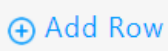
Step 3: Click 💾 button from Top Menu Bar to save Header Details form record. Once it is saved Shipping Bill Line section will be activated.
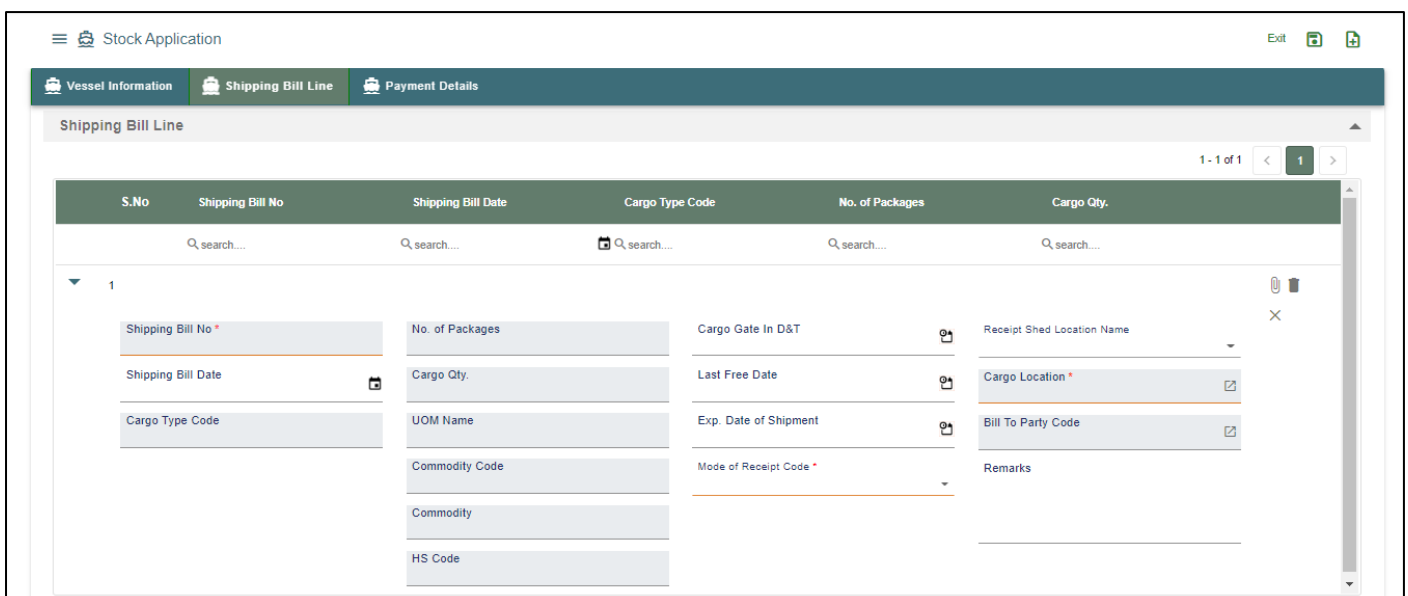
✅ Record saved

Step 4: Click 💾 button from Top Menu Bar to save Header Details form record. Once it is saved Shipping Bill Line section will be activated.

User Interface Image 59- Shipping Bill Line- **9.5.1**

Click on ⊕ Add Row to begin with data entry
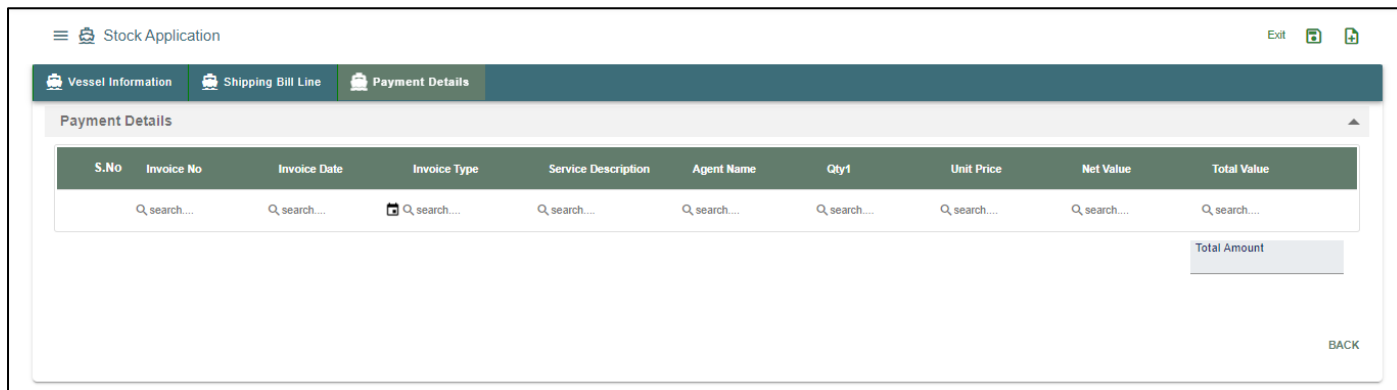
Below are the Field Information regarding Shipping Bill Line Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Step 5: Once data is filled in Shipping Bill Line Details, click on Next button then user will move to Payment Details Section.

Adding the files manually once the record got saved, Click on the [paperclip] icon. Then the user will be redirected to the popup window as below –

Click on [+ Add files] button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [paperclip] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [paperclip] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (1) ✕

	SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Draft Survey							
☐	1.		Survey Report 1 ⌄				*File Required

＋ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display the status [**File uploaded**] on the screen.

Attachments (1) ✕

	SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Draft Survey							
☐	1.		Survey Report 1 ⌄				*File Required

＋ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Click On Close Button

Click on the Save button 🖫 from the top right corner to save Form. Once the record got saved successfully, then the system will display [✔ **Record saved**] message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◈ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on ⬦ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on ⬦ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon

system will display **Confirmation required** with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

37. BUSINESS FUNCTION NAME: Transporter Booking

37.1   DEFINITION:

THE PURPOSE OF THIS FUNCTION IS TO BOOK ANY TRANSPORTER FOR PARTICULAR CARGO DELIVERY FROM PORT.

37.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⚏ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Gate Operation→ Transporter Booking→ Click on New button 🗋
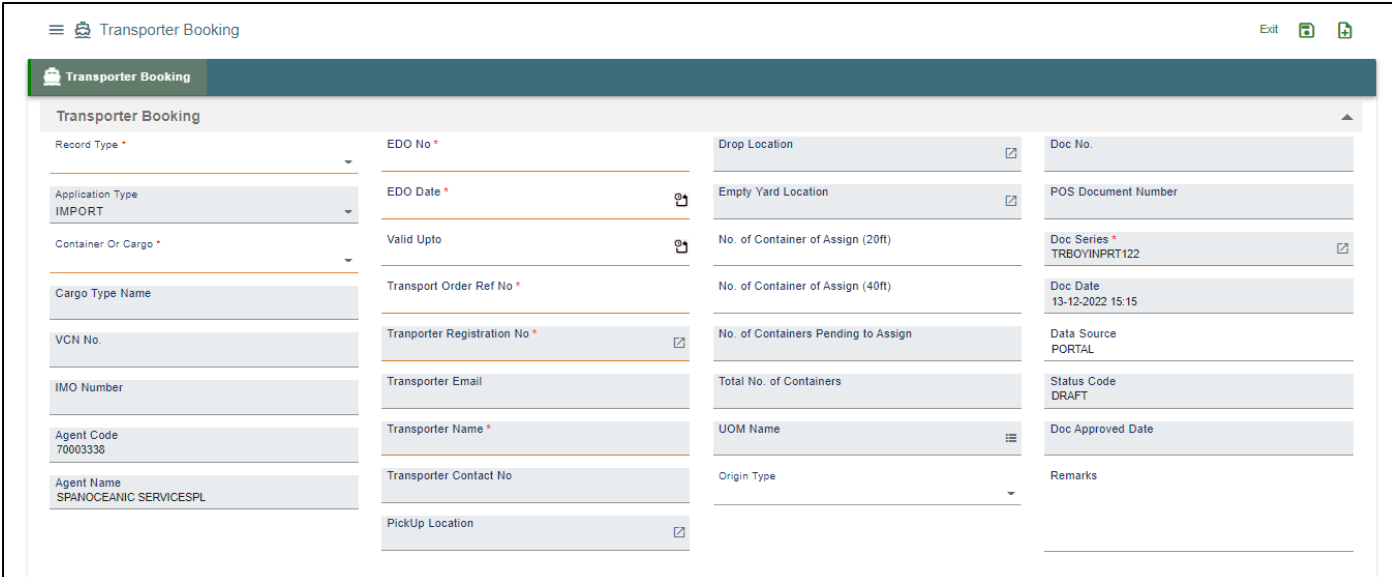
USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

37.3   PREREQUISITES – MASTERS

37.4   SCREENSHOT

Following screenshot from Transporter Booking.

Step 1- Click on New button 🗋 . The user shall redirect to the screen like below-
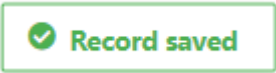

User Interface Image 359 –Transporter Booking 50.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Transporter Booking Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Step 3: Click on the Save button [save icon] from the top right corner to save the Form. Once the record got saved successfully, then the system will display [✓ Record saved] message.

Step 4: After saving the record click on the [attachment icon] icon. Then the user will be redirected to the Attachments Window. –

User Interface Image 360- Vehicle/Visitor/Company Blacklisting 50.5.2

Step 5: Click on attachment icon if any attachment are configured it will auto populate or Click on [+ Add files] fill the required fields and upload the documents if any through [Upload ⬆] button and can download the attached document by clicking on the file name attached.

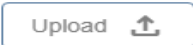*User Interface Image 361- Vehicle/Visitor/Company Blacklisting 50.5.3*

Step 6: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through **Upload ⬆** button and can download the attached document by clicking on the file name attached.

Step 7: Configure Check List in Check List Form for respective forms. Then Click on 📋 icon. Configured parameters will display in the Check List Window.

Check List				💾 X
Parameter Code	**Parameter Name**	**Yes/No**	**REMARKS**	
FRESH WATER	Fresh Water	☐		

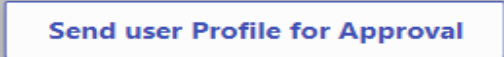**Step 8:** Click on Save, System will display the ✅ **checklist saved X** status on the screen.

Step 9: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◇ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step10: Once the workflow is initiated click on ◇ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to WFAPP

Step11: Once the user Approve the request the following   status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. ⊘ **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step12: Once the workflow is in WFAPP. Click on   the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to APPROVED

Step13: Once the user Approve the request the   following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. ⊘ **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 14: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval   ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step 15: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 16: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

Alert Message   ✕

ⓘ Do you want to cancel?

NO   YES

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display [Ok] and status will change to CANCEL

Step 17: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

Step 18: Click on 🗎 icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

By Clicking on 🌪 can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

38. BUSINESS FUNCTION NAME: Truck Driver Change

38.1   DEFINITION:

THE PURPOSE OF THIS FUNCTION IS TO CHANGE THE DRIVER FOR A PARTICULAR VEHICLE.

38.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⠿ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Gate Operation→ Truck Driver Change→ Click on New button 🗎⁺
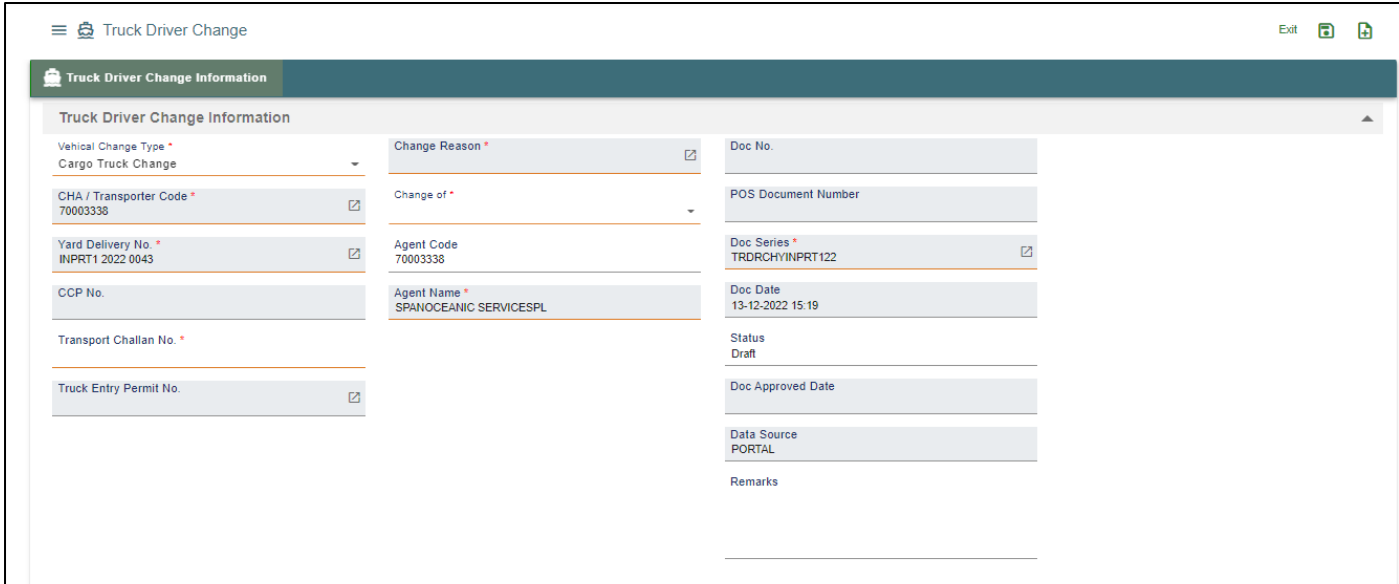
USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

38.3   PREREQUISITES – MASTERS

38.4   SCREENSHOT

Following screenshot from Truck Driver Change.

Step 1- Click on New button 🗎⁺ . The user shall redirect to the screen like below-

User Interface Image 359 –Truck Driver Change 50.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.
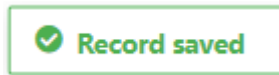
Below are the Field Information regarding Truck Driver change Details Section.

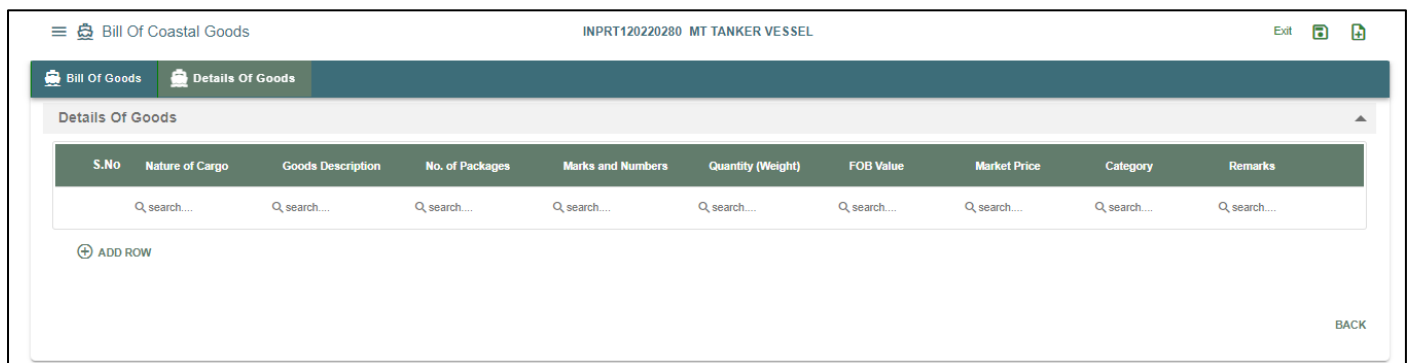(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Step 3: Click on the Save button 🖫 from the top right corner to save the Form. Once the record got saved

successfully, then the system will display ✅ Record saved message.

Step 4: After saving the record click on the 📎 icon. Then the user will be redirected to the Attachments Window. –

Attachments (0)   ✕

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 360- Vehicle/Visitor/Company Blacklisting 50.5.2

Step 5: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ **Add files** fill the required fields and upload the documents if any through Upload ⬆ button and can download the attached document by clicking on the file name attached.

Attachments (0)   ✕

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 361- Vehicle/Visitor/Company Blacklisting 50.5.3

Step 6: Click on attachment icon if any attachment are configured it will auto populate or Click on **+ Add files** fill the required fields and upload the documents if any through **Upload ⬆** button and can download the attached document by clicking on the file name attached.

Step 7: Configure Check List in Check List Form for respective forms. Then Click on ☰ icon. Configured parameters will display in the Check List Window.

Check List				🖫 X
Parameter Code	**Parameter Name**	**Yes/No**	**REMARKS**	
FRESH WATER	Fresh Water	☐		

Step 8: Click on Save, System will display the ✔ **checklist saved** X status on the screen.

Step 9: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ⬦ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

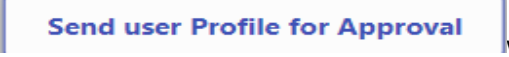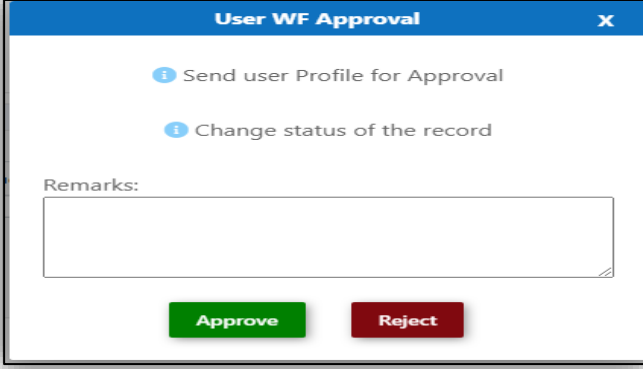**Step10**: Once the workflow is initiated click on ⬦ the icon. System will be display **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to WFAPP

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. ⚠ **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step12: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Successfully Status changed to APPROVED

Step13: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'.

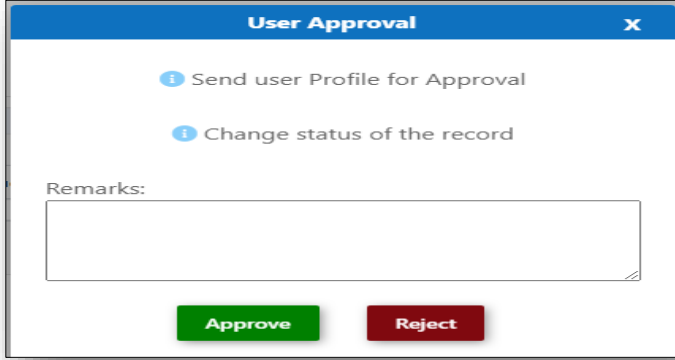If user reject the request following alert will display on the screen. ⚠ **Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 14: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval   ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step 15: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **⊗ Remarks required!** .Up On Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 16: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

Alert Message   ✕

ⓘ Do you want to cancel?

NO   YES

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

Cancellation ✕

Reason Description *

Remarks

Requested By

EXIT   PROCEED

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display **Ok** and status will change to CANCEL

Step 17: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

☰ 🚢 Truck Driver Change

Doc No.	POS Document Number	Status	CCP No.	Transport Challan No.	Truck Entry Permit No.	Agent Name	Agent Code	Doc Date	Doc Approved Date	Data Source
🔍 sear...	🔍 search...	🔍 sea...	🔍 searc...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	search.... 📅	search.... 📅	🔍 search...
28		Draft				SPANOCEANIC SERVICESPL	70003338	13-12-2022 15:24		PORTAL
27		Draft				SPANOCEANIC SERVICESPL	70003338	13-12-2022 15:19		PORTAL

Step 18: Click on 🔍 icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

Search ✕

Field	Condition	Value1	Value2	Concatenate Condition
⌄	⌄	search....	search....	and ⌄

⊕ Add Row

Clear ✕   Search 🔍

By Clicking on 🔽 can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

39. BUSINESS FUNCTION NAME: BILL OF COASTAL GOODS

39.1 DEFINITION:

This Function is for Import of Coastal Cargo.

39.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar →Cargo→ Others→ Bill of Coastal Goods→ Click on New button 🔲

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

39.3 PREREQUISITES – MASTERS

39.4 SCREENSHOT

Following Screenshots are from Bill Of Coastal Goods.

Step 1- Click on New button 🔲 and We will redirect to screen like below.

User Interface Image 59- Bill Of Coastal Goods- **9.5.1**

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Bill Of Coastal Goods Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Step 3: Click ⬛ button from Top Menu Bar to save Header Details form record. Once it is saved Details of Goods section will be activated.

Step 4: Click ⬛ button from Top Menu Bar to save Header Details form record. Once it is saved Details of Goods section will be activated.
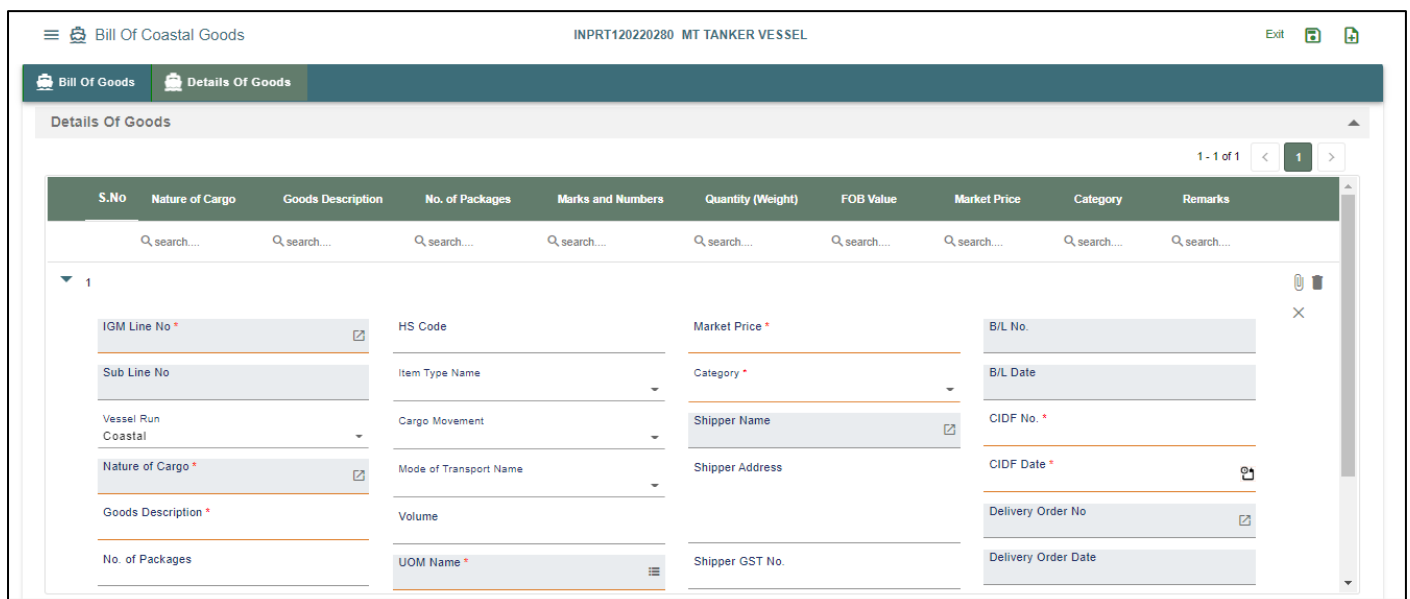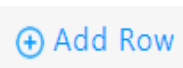
User Interface Image 59- Details of Goods **- 9.5.1**

Below are the Field Information regarding Cargo & Container Stock report Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Click on ⊕ Add Row to begin with data entry

Step 5: Once data is filled in Contact Details, click on save button ⬛ and click on ⊕ Add Row if need to add multiple Row's or else click on ⬛ button.

Adding the files manually once the record got saved, Click on the [paperclip icon] icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload ↑** button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [paperclip icon] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [paperclip icon] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Draft Survey							
☐	1.		Survey Report 1 ⌄				*File Required

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Now Click on the Check boxes accordingly, then │ Select files │ button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (1)   ✕

	SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Draft Survey							
☐	1.		Survey Report 1 ⌄				*File Required

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

Once all the mandatory and required fields are filled then Click on │ Upload ⬆ │ button. System will display

the status │ **File uploaded** │ on the screen.

Click On Close Button

Click on the Save button from the top right corner to save Form. Once the record got saved successfully, then the system will display message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on the icon. System will be display

 with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following   status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on   the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to APPROVED

Step11: Once the user Approve the request the   following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon

system will display **Confirmation required** with below alert ok and Back

345

Alert Message ✕

ⓘ Do you want to cancel?

NO   YES

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

Cancellation ✕

Reason Description

Remarks

Requested By

Exit   Proceed

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

40. BUSINESS FUNCTION NAME: TRANSSHIPMENT PERMIT

40.1   DEFINITION:

This Function is for Import of Transshipment Cargo.

40.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⚏ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar →Cargo→ Others→ Transshipment Permit → Click on New button ⊞

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

40.3   PREREQUISITES – MASTERS

40.4   SCREENSHOT

Following Screenshots are from Transshipment Permit.

Step 1- Click on New button 📄 and We will redirect to screen like below.

User Interface Image 59- Transshipment Permit **- 9.5.1**

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.
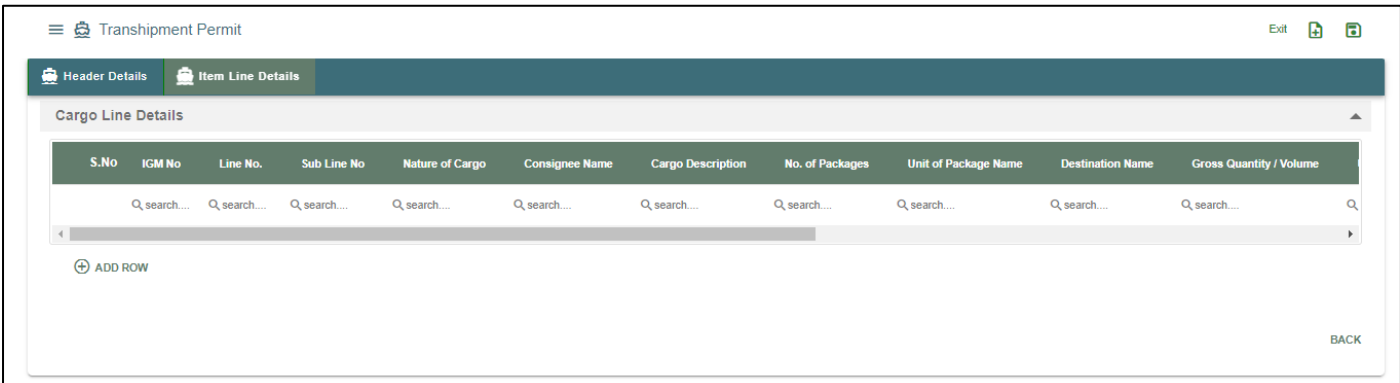
Below are the Field Information regarding Transshipment Permit Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Step 3: Click 💾 button from Top Menu Bar to save Header Details form record. Once it is saved Item Line Details section will be activated.

Step 4: Click 💾 button from Top Menu Bar to save Header Details form record. Once it is saved Item Line Details section will be activated.

User Interface Image 59- Transshipment Permit **- 9.5.1**

Below are the Field Information regarding Item Line Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Click on ⊕ Add Row to begin with data entry

Step 5: Once data is filled in Contact Details, click on save button 🔲 and click on ⊕ Add Row if need to add multiple Row's or else click on 🔲 button.

Adding the files manually once the record got saved, Click on the 📎 icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload ⬆** button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [paperclip icon] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [paperclip icon] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display the status [File uploaded] on the screen.

Click On Close Button

Click on the Save button [icon] from the top right corner to save Form. Once the record got saved successfully, then the system will display [Record saved] message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button   .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on   the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following   status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on   the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the icon shown. After clicking the icon

system will display with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display and status will change to CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively.

41. BUSINESS FUNCTION NAME: ASSESSMENT CHARGES FOR VESSEL

41.1 DEFINITION:

THE SHIPPING AGENT SUBMITS THIS REQUEST TO THE PORT TO GET THE AMOUNT TO BE PAID TO THE PORT FOR THE VESSEL SERVICES.

41.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⠿ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Marine→ Billing→ Transactions→ ASSESSMENT CHARGES FOR VESSEL→ Click on New button

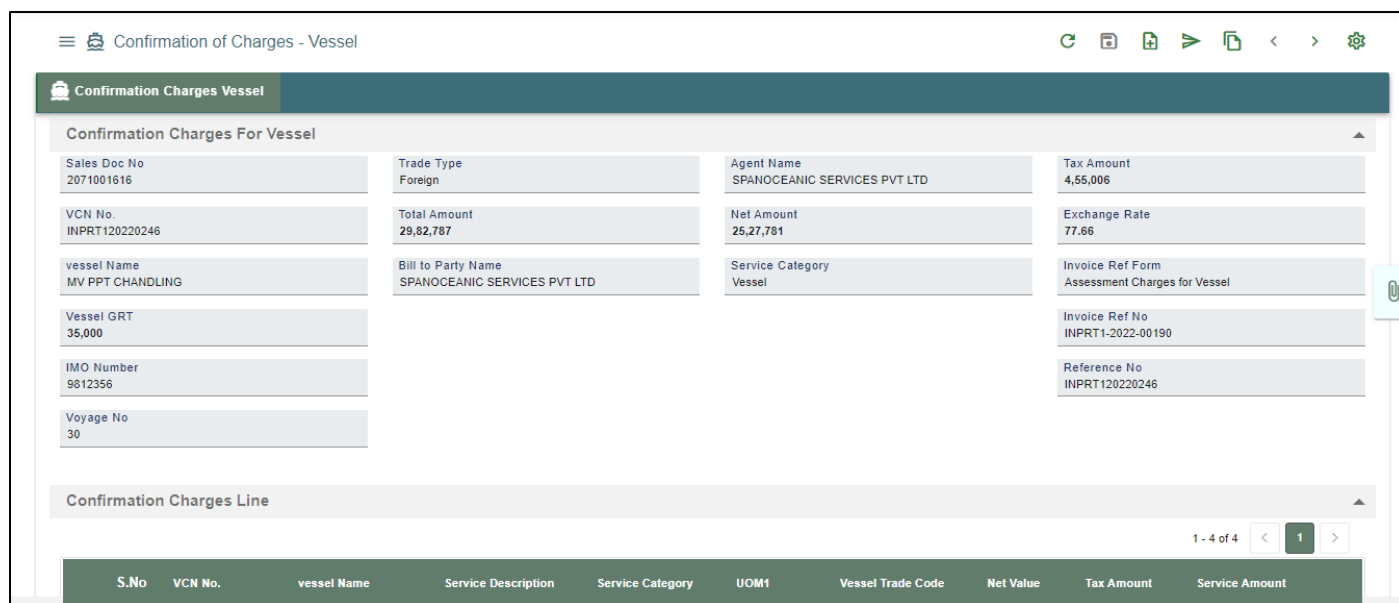USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.
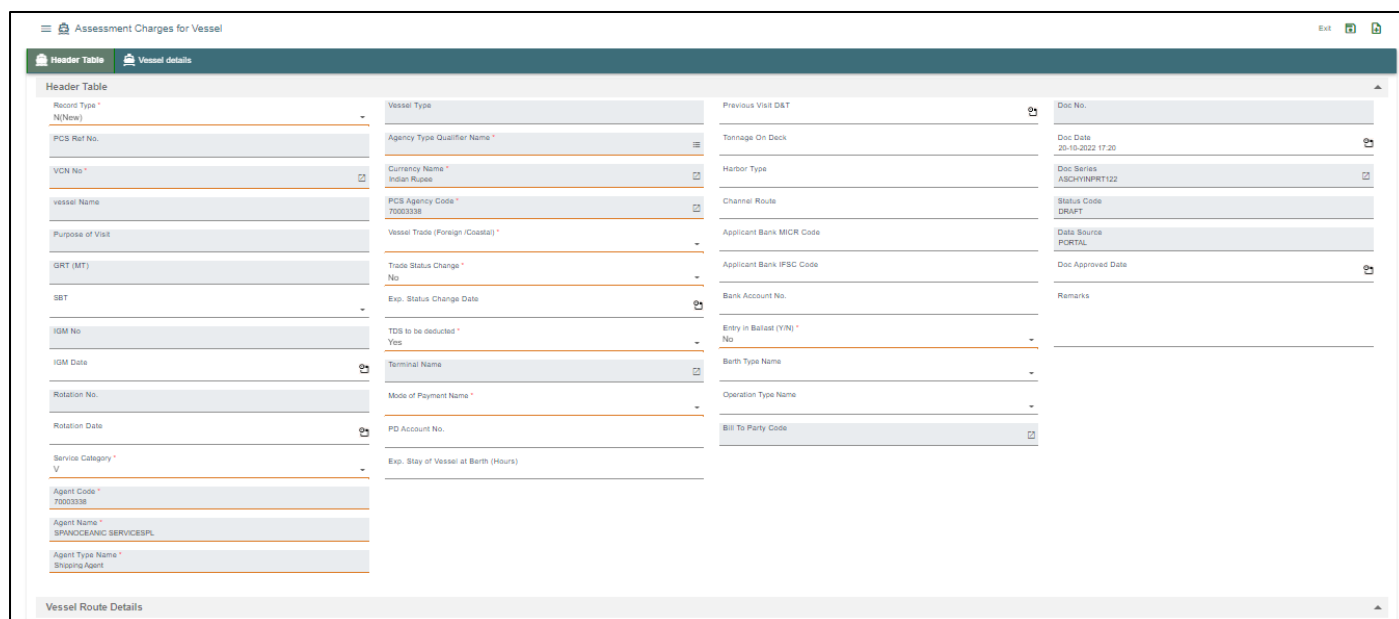
41.3 PREREQUISITES – MASTERS

1. Agent
2. Agent Type
3. UOM
4. Location
5. Currency

41.4 SCREENSHOTS

Following screenshot from Assessment charges of Vessel

Step 1- Click on New button . The user shall redirect to the screen like below-

User Interface Image 325-Assessment Charges for Vessel 43.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding **Header** Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Record Type*	Yes	Auto populate/Dropdown
CALINF Ref Number	No	Autopopulate
VCN No.*	Yes	Autopopulate/Form Lookup
Vessel Name	No	Autopopulate
Purpose of Visit	No	Autopopulate
GRT	No	Autopopulate
SBT	No	Autopopulate/Text Box
IGM No	No	Autopopulate
IGM Date	No	Autopopulate
Rotation No	No	Autopopulate
Rotation Date	No	Autopopulate
Service Category*	Yes	Autopopulate/Dropdown
Vessel Type	No	Autopopulate
Agency Type Qualifier Code*	Yes	Autopopulate/Form Lookup
Agency Code*	Yes	Autopopulate/Form Lookup
Currency Code for Payment	No	Autopopulate/Form Lookup
Trade*	Yes	Autopopulate/Dropdown
Trade Status Change*	Yes	Autopopulate/Dropdown
Expected Status Change Date	No	Autopopulate/Calendar
TDS*	Yes	Autopopulate/Dropdown
Terminal Code	No	Autopopulate/Form Lookup

Payment Mode*	Yes	Autopopulate/Dropdown
PD Account No	Yes/No	Autopopulate/Text Box
Expected Stay of Vessel At Berth (Hours)	No	Autopopulate/Text Box
Date of Last Vessel Visit	No	Autopopulate/Calendar
Tonnage on Deck	No	Autopopulate/Text Box
Habour Type	No	Autopopulate/Text Box
Channel Route	No	Autopopulate/Text Box
Applicants Bank MICR Code	No	Autopopulate/Text Box
Applicants Bank IFSC Code	No	Autopopulate/Text Box
Applicants Bank Account No	No	Autopopulate/Text Box
Entry in Ballast*	Yes	Autopopulate/Dropdown
Berth Type	No	Autopopulate/Dropdown
Operation	No	Autopopulate/Dropdown
Bill to Party Code	No	Autopopulate/Text Box
Remarks	No	Text Box

Step 3: Once all the mandatory and required fields are filled then Click on the **Next** button from the bottom of the page. Then the user will be redirected to the vessel Details page as below. Click on the ⊕ Add Row button.

User Interface Image 332- Assessment Charges for Vessel 43.5.2

Step 4: The system shall display below fields to enter.

User Interface Image 326- Assessment Charges for Vessel 43.5.3

Below are the Field Information regarding **Vessel** Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Record Type*	Yes	Autopopulate/Dropdown
Port Code	No	Autopopulate
VCN	No	Autopopulate
Vessel Name	No	Autopopulate
Service Type*	Yes	Autopopulate/Dropdown
Sub Service Type*	Yes	Autopopulate/Dropdown
Quantity 1*	Yes	Autopopulate/Text Box
Unit of Measurement 1*	Yes	Autopopulate/Form Lookup
Quantity 2	No	Autopopulate/Text Box
Unit of Measurement 2	No	Autopopulate/Form Lookup
From Location	No	Autopopulate/Form Lookup
To Location	No	Autopopulate/Form Lookup
Tug Used Container	No	Autopopulate/Dropdown
Port Dock Movement Indicator	No	Autopopulate/Dropdown
Lash Barge/ Dumb Barge Indicator	No	Autopopulate/Dropdown

Step 5: Click on the Save button ⊡ from the top right corner to save the Form. Once the record got saved successfully, then the system will display ✅ **Record saved** message.

Step 6: After saving the record click on the 📎 icon. Then the user will be redirected to the Attachments Window. –

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Attachments (0) ✕

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 327-Assessment Charges f Vessel 43.5.4

Step 7: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through **Upload ⬆** button and can download the attached document by clicking on the file name attached.

Attachments (0) ✕

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ ADD FILES   SELECT FILES

or

Drag files here, to upload

UPLOAD   CLOSE

User Interface Image 328-Assessment Charges for Vessel 43.5.5

Step 8: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through **Upload ⬆** button and can download the attached document by clicking on the file name attached.

Step 9: Configure Check List in Check List Form for respective forms. Then Click on ▤ icon. Configured parameters will display in the Check List Window.

Check List

Parameter Code	Parameter Name	Yes/No	REMARKS
FRESH WATER	Fresh Water	☐	

Step 10: Click on Save, System will display the ✓ checklist saved X status on the screen.

Step 11: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◈ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step12: Once the workflow is initiated click on ◈ the icon. System will be display Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step13: Once the user Approve the request the following Successfully Status changed to WFAPP status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. ❶ Remarks required! .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step14: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ×

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step15: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 16: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ×

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step 17: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

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If user reject the request following alert will display on the screen. **⊗ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 18: While if there is any changes or error we can cancel the record by clicking the [icon] icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

Alert Message ✕

ⓘ Do you want to cancel?

NO   YES

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

Cancellation ✕

Reason Description *

Remarks

Requested By

EXIT   PROCEED

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display **Ok** and status will change to CANCEL

Step 19: Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

≡ 🏛 Assessment Charges for Vessel

VCN No.	Status Code	Vessel Name	Doc No.	Assessment Type Name	PCS Agency Name	PCS Agency Code	Vessel Trade (Foreign /Coastal)	Bill To Party Code	Bill to Party Name
Q search...	Q search...	Q search...	Q search...	Q search...	Q search...	Q search...	Q search...	Q search...	Q search...

User Interface Image 329- Assessment Charges for Vessel 43.5.6

Step 19: Click on [icon] icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

Search

Field	Condition	Value1	Value2	Concatenate Condition
⌄	⌄	search....	search....	and ⌄

⊕ Add Row

Clear ✖   Search Q

By Clicking on ▽ can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

42. BUSINESS FUNCTION NAME: CONFIRMATION OF CHARGES-VESSEL

42.1   DEFINITION:

42.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Billing→ Transactions→ Confirmation of Charges-Vessel→ Click on New button 🗎

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

42.3   PREREQUISITES – MASTERS

42.4   SCREENSHOT

Following screenshot from CONFIRMATION OF CHARGES-VESSEL

Step 1- Click on any record in List Data. The user shall redirect to the screen like below-

User Interface Image 421 – CONFIRMATION OF CHARGES-VESSEL61.5.1

User Interface Image 422 – CONFIRMATION OF CHARGES-VESSEL 61.5.2
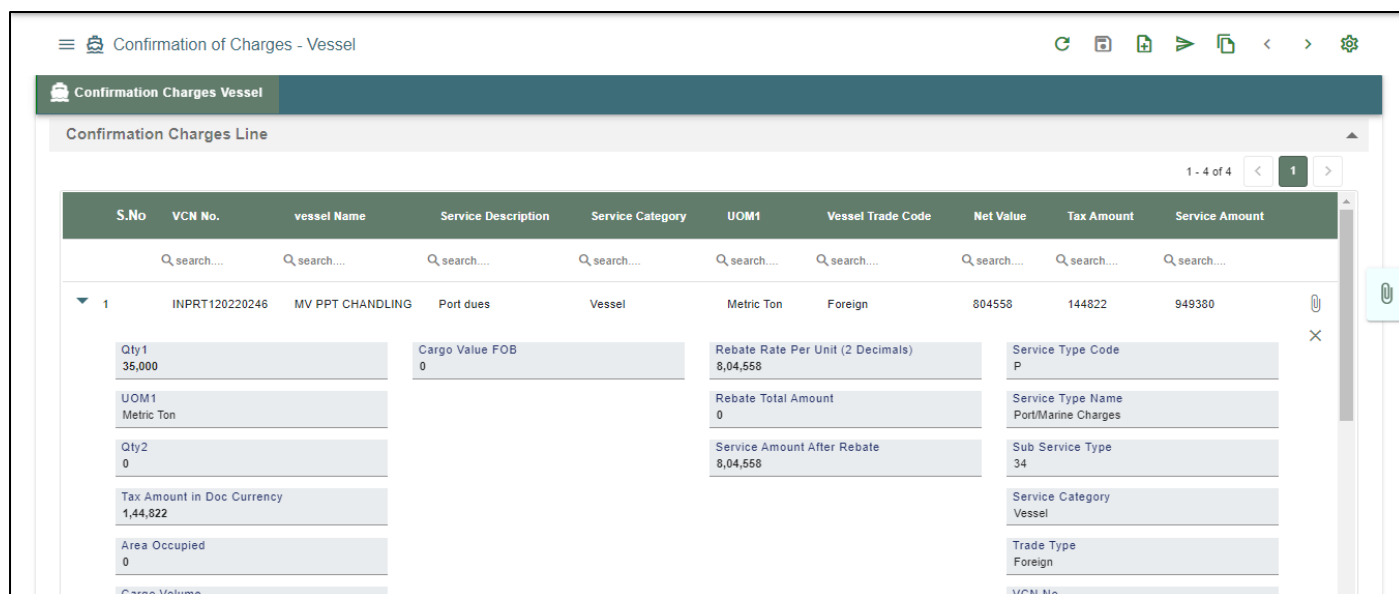
Below are the Field Information regarding Confirmation Charges Vessel Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Sales Doc No	No	Auto Populated
VCN No	No	Auto Populated
Trade Type	No	Auto Populated
Total Amount	No	Auto Populated
Bill to Party Name	No	Auto Populated
Vessel Name	No	Auto Populated

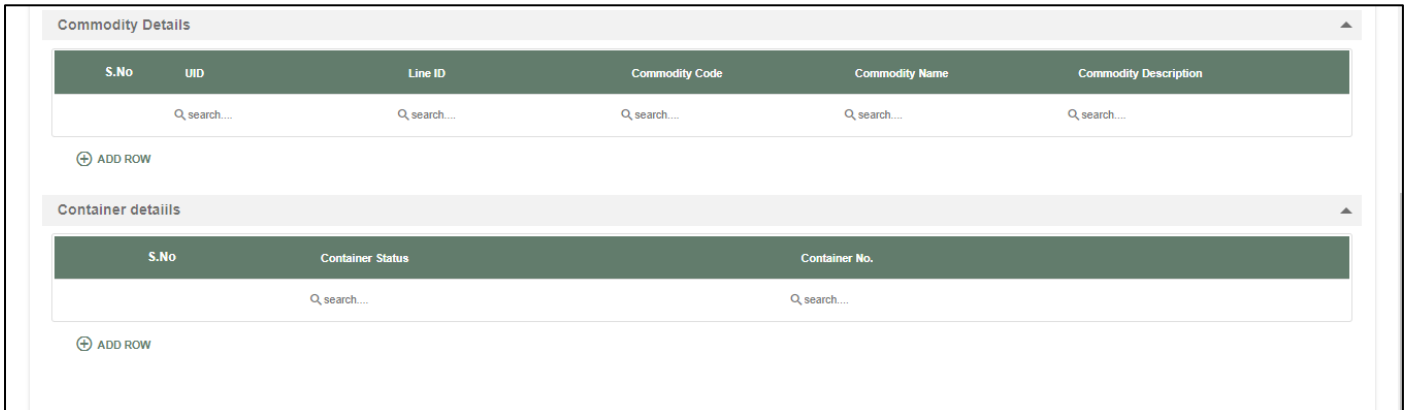| Vessel GRT	No	Auto Populated
Agent Name	No	Auto Populated
IMO No	No	Auto Populated
Net Amount	No	Auto Populated
Service Category	No	Auto Populated
Voyage No	No	Auto Populated
Tax Amount	No	Auto Populated
Qty1	Yes	Auto Populated
UOM1	No	Auto Populated
Qty2	No	Auto Populated
Tax Amount in Doc Currency	No	Auto Populated
Area Occupied	Yes	Auto Populated
Cargo Volume	Yes	Auto Populated
Vessel Trade (Foreign /Coastal)	No	Auto Populated
Cargo Value CIF	No	Auto Populated
Cargo Value FOB	No	Auto Populated
Rebate Rate Per Unit (2 Decimals)	No	Auto Populated
Rebate Total Amount	No	Auto Populated
Service Amount After Rebate	No	Auto Populated
Service Type Code	No	Auto Populated
Trade Type	No	Auto Populated
Vessel Name	No	Auto Populated
Unit Rate	No	Auto Populated
Total Amount	No	Auto Populated
Short Text For Sales Order Item	No	Auto Populated
Attachment Type Name	No	Form lookup/Auto Populated
Attachment Name	No	Form lookup/Auto Populated
Certificate Valid From D&T	No	Calendar/Auto Populated
Certificate Valid To D&T	No	Calendar/Auto Populated

Certificate Name	No	Auto Populated

Step 3: Click on the [icon] icon. Then the user will be redirected to the Attachments Window. –

Attachments (0)

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ Add files   Select files

or

Drag files here, to upload

Upload   Close

User Interface Image 423 – CONFIRMATION OF CHARGES-VESSEL 61.3.

Step 4: Click on attachment icon if any attachment are configured it will auto populate or Click on [+ Add files] fill the required fields and upload the documents if any through [Upload] button and can download the attached document by clicking on the file name attached.

Attachments (0)

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear

+ Add files   Select files

or

SNo.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	Certificate Name	Clear
1.	General Doc	International	03-04-2022 15:07	30-04-2022 15:07	Berth Allocation issue.png (121.26 kb)	

Upload   Close

User Interface Image 424 – CONFIRMATION OF CHARGES-VESSEL 61.5.4

Step 5: Click on attachment icon if any attachment are configured it will auto populate or Click on [+ Add files] fill the required fields and upload the documents if any through [Upload] button and can download the attached document by clicking on the file name attached.

Step 6: The record that can be seen in ≡ as shown below

User Interface Image 425 – CONFIRMATION OF CHARGES-VESSEL 61.5.5

Step 7: Click on 🔍 icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

By Clicking on 🔽 can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

43. Business Function Name: PDA Balance

43.1   DEFINITION:

43.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⬛ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Billing→ Transactions→ PDA Balance→ Click on New button 📄

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.
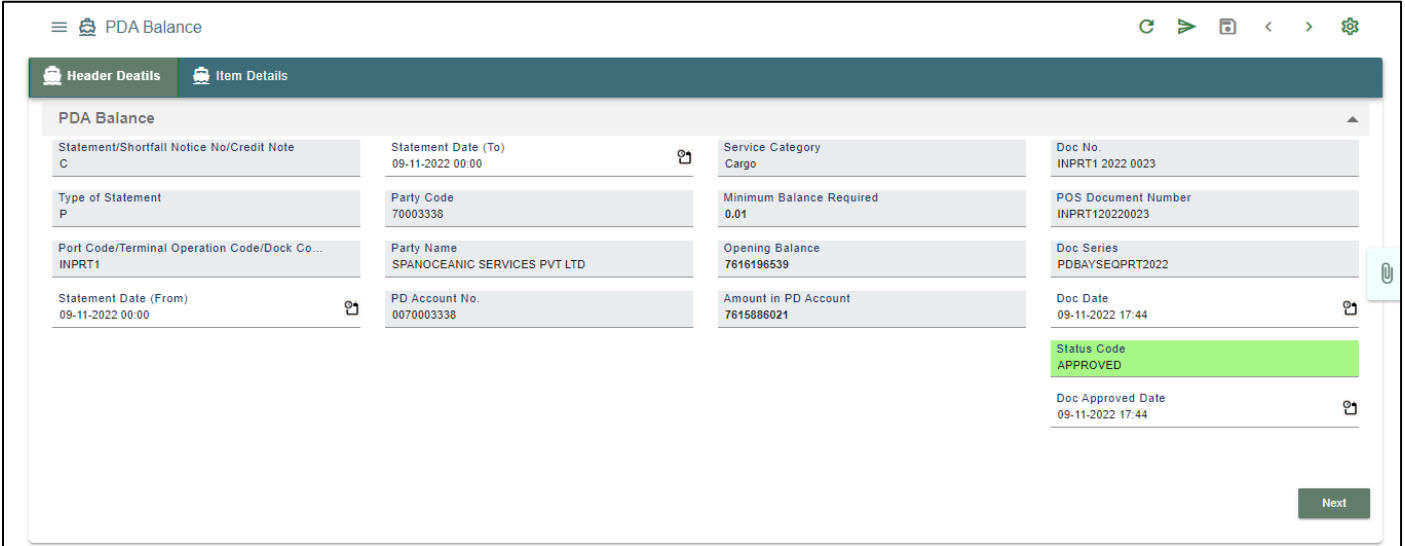
43.3   PREREQUISITES – MASTERS

43.4   SCREENSHOT

Following screenshot from PDA Balance

Step 1- Click on any record in List Data. The user shall redirect to Header Details Section screen like below-

User Interface Image 426 –PDA Balance62.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*). Then click on Next Button then User will go to Item Details Section.

Click on ⊕ Add Row the button.

User Interface Image 427 –PDA Balance62.5.2

Step 3: Click on the [icon] icon. Then the user will be redirected to the Attachments Window. –

User Interface Image 428 – PDA Balance 62.3.

Step 4: Click on attachment icon if any attachment are configured it will auto populate or Click on [+ Add files] fill the required fields and upload the documents if any through [Upload] button and can download the attached document by clicking on the file name attached.

User Interface Image 429 – PDA Balance 62.5.4

Step 5: Click on attachment icon if any attachment are configured it will auto populate or Click on [+ Add files] fill the required fields and upload the documents if any through [Upload ⬆] button and can download the attached document by clicking on the file name attached.

Step 6: The record that can be seen in ☰ as below

User Interface Image 430 – PDA Balance.5.5

Step 7: Click on 🔍 icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

By Clicking on 🔽 can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

44. BUSINESS FUNCTION NAME: ASSESSMENT OF CHARGES CARGO AND STEVEDORE

44.1 DEFINITION:

THE AGENT SUBMITS THIS REQUEST TO THE PORT TO GET THE AMOUNT TO BE PAID TO THE PORT FOR THE VESSEL, CARGO, STEVEDORE SERVICES.

44.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Marine→ Billing→ Transactions→ ASSESSMENT OF CHARGES CARGO AND STEVEDORE→ Click on New button 🗋

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.
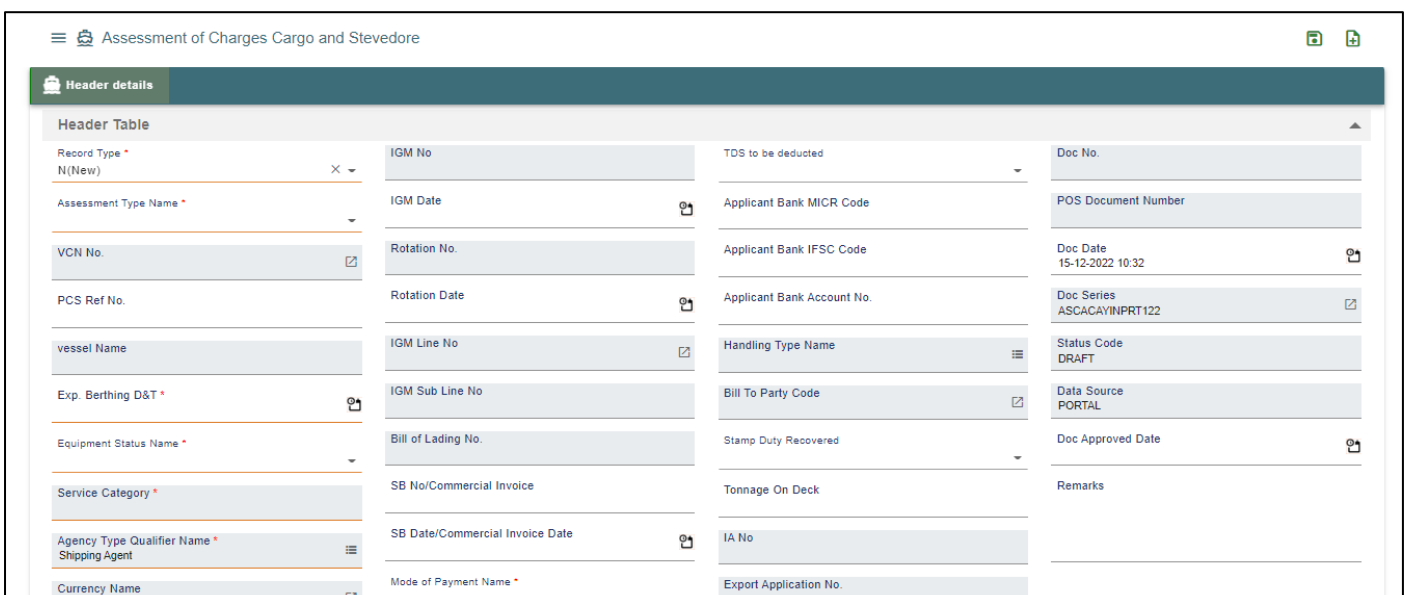
44.3 PREREQUISITES – MASTERS

6. Agent
7. Agent Type
8. UOM
9. Location
10. Currency

44.4 SCREENSHOTS

Following screenshot from Assessment of charges Cargo and Stevedore

Step 1- Click on New button 🗋 . The user shall redirect to the screen like below-

User Interface Image 325-Assessment of Charges Cargo and Stevedore 43.5.1

Step 2: Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding **Header** Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Record Type*	Yes	Auto populate/Dropdown
CALINF Ref Number	No	Autopopulate
VCN No.*	Yes	Autopopulate/Form Lookup
Vessel Name	No	Autopopulate
Purpose of Visit	No	Autopopulate
GRT	No	Autopopulate
SBT	No	Autopopulate/Text Box
IGM No	No	Autopopulate
IGM Date	No	Autopopulate
Rotation No	No	Autopopulate
Rotation Date	No	Autopopulate
Service Category*	Yes	Autopopulate/Dropdown
Vessel Type	No	Autopopulate
Agency Type Qualifier Code*	Yes	Autopopulate/Form Lookup
Agency Code*	Yes	Autopopulate/Form Lookup
Currency Code for Payment	No	Autopopulate/Form Lookup
Trade*	Yes	Autopopulate/Dropdown
Trade Status Change*	Yes	Autopopulate/Dropdown
Expected Status Change Date	No	Autopopulate/Calendar
TDS*	Yes	Autopopulate/Dropdown
Terminal Code	No	Autopopulate/Form Lookup
Payment Mode*	Yes	Autopopulate/Dropdown
PD Account No	Yes/No	Autopopulate/Text Box
Expected Stay of Vessel At Berth (Hours)	No	Autopopulate/Text Box
Date of Last Vessel Visit	No	Autopopulate/Calendar
Tonnage on Deck	No	Autopopulate/Text Box
Habour Type	No	Autopopulate/Text Box
Channel Route	No	Autopopulate/Text Box
Applicants Bank MICR Code	No	Autopopulate/Text Box
Applicants Bank IFSC Code	No	Autopopulate/Text Box
Applicants Bank Account No	No	Autopopulate/Text Box
Entry in Ballast*	Yes	Autopopulate/Dropdown
Berth Type	No	Autopopulate/Dropdown
Operation	No	Autopopulate/Dropdown
Bill to Party Code	No	Autopopulate/Text Box
Remarks	No	Text Box

Step 3: Once all the mandatory and required fields are filled Then the user will be redirected Charges Details Section page as below. Click on the ⊕ Add Row button.

User Interface Image 332- Assessment of Charges Cargo and Stevedore 43.5.2

Step 4: The system shall display below fields to enter.

User Interface Image 326- Assessment of Charges Cargo and Stevedore 43.5.3

Below are the Field Information regarding **Vessel** Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Record Type*	Yes	Autopopulate/Dropdown
Port Code	No	Autopopulate
VCN	No	Autopopulate
Vessel Name	No	Autopopulate
Service Type*	Yes	Autopopulate/Dropdown
Sub Service Type*	Yes	Autopopulate/Dropdown
Quantity 1*	Yes	Autopopulate/Text Box
Unit of Measurement 1*	Yes	Autopopulate/Form Lookup
Quantity 2	No	Autopopulate/Text Box
Unit of Measurement 2	No	Autopopulate/Form Lookup
From Location	No	Autopopulate/Form Lookup
To Location	No	Autopopulate/Form Lookup

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Tug Used Container	No	Autopopulate/Dropdown
Port Dock Movement Indicator	No	Autopopulate/Dropdown
Lash Barge/ Dumb Barge Indicator	No	Autopopulate/Dropdown

Step 5: Once all the mandatory and required fields are filled Then the user will be redirected Commodity Details & Container Details Section page as below. Click on the ⊕ Add Row button.

Click on the ⊕ Add Row button.

Step 5: Click on the Save button 💾 from the top right corner to save the Form. Once the record got saved successfully, then the system will display ✅ Record saved message.

Step 6: After saving the record click on the 📎 icon. Then the user will be redirected to the Attachments Window. –

User Interface Image 327-Assessment Charges f Vessel 43.5.4

Step 7: Click on attachment icon if any attachment are configured it will auto populate or Click on
+ Add files fill the required fields and upload the documents if any through **Upload** button and can download the attached document by clicking on the file name attached.

User Interface Image 328-Assessment Charges for Vessel 43.5.5

Step 8: Click on attachment icon if any attachment are configured it will auto populate or Click on
+ Add files fill the required fields and upload the documents if any through **Upload** button and can download the attached document by clicking on the file name attached.

Step 9: Configure Check List in Check List Form for respective forms. Then Click on **≔** icon. Configured parameters will display in the Check List Window.

Check List				🖫 X
Parameter Code	Parameter Name	Yes/No	REMARKS	
FRESH WATER	Fresh Water	☐		

Step 10: Click on Save, System will display the ✅ **checklist saved** X status on the screen.

Step 11: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◇ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step12: Once the workflow is initiated click on ◇ the icon. System will be display **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE REJECT

Successfully Status changed to WFAPP

Step13: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'.

If user reject the request following alert will display on the screen. ❗ **Remarks required!** .Up On

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Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step14: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step15: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

If user reject the request following alert will display on the screen. **❗ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 16: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

Send user Profile for Approval

Remarks:

APPROVE   REJECT

Step 17: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'.

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If user reject the request following alert will display on the screen. **⊘ Remarks required!** .Up On

Adding the remarks click on Reject. Alert will display on the screen **Successfully rejected.** and the document status will be changed as 'REJECTED'.

Step 18: While if there is any changes or error we can cancel the record by clicking the 🗎 icon shown.

After clicking the icon system will display **Confirmation required** with below alert Yes and No

Alert Message ×

ⓘ Do you want to cancel?

NO   YES

By Clicking on No we can go to the previous screen. By clicking Yes we can see the below fields in Alert.

Cancellation ×

Reason Description *
☐

Remarks

Requested By

EXIT   PROCEED

By Clicking on Exit we can go to the previous screen. By clicking on Proceed system will display **Ok** and status will change to CANCEL

Step 19: Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

☰ 🏛 Assessment Charges for Vessel										⊕ 🗎
VCN No.	Status Code	Vessel Name	Doc No.	Assessment Type Name	PCS Agency Name	PCS Agency Code	Vessel Trade (Foreign /Coastal)	Bill To Party Code	Bill to Party Name	
🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	

User Interface Image 329- Assessment Charges for Vessel 43.5.6

Step 19: Click on 🔍 icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

By Clicking on ▽ can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

45. BUSINESS FUNCTION NAME: CONFIRMATION OF CHARGES-CARGO

45.1   DEFINITION:

45.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⠿ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Billing→ Transactions→ Confirmation of Charges-Cargo→ Click on New button 🗋

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

45.3   PREREQUISITES – MASTERS

45.4   SCREENSHOT

Following screenshot from CONFIRMATION OF CHARGES-CARGO

Step 1- Click on any record in List Data. The user shall redirect to the screen like below-

User Interface Image 421 – CONFIRMATION OF CHARGES-CARGO61.5.1

User Interface Image 422 – CONFIRMATION OF CHARGES-CARGO 61.5.2

Below are the Field Information regarding Confirmation Charges Cargo Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Sales Doc No	No	Auto Populated
VCN No	No	Auto Populated
Trade Type	No	Auto Populated
Total Amount	No	Auto Populated
Bill to Party Name	No	Auto Populated
Vessel Name	No	Auto Populated
Vessel GRT	No	Auto Populated

Agent Name	No	Auto Populated
IMO No	No	Auto Populated
Net Amount	No	Auto Populated
Service Category	No	Auto Populated
Voyage No	No	Auto Populated
Tax Amount	No	Auto Populated
Qty1	Yes	Auto Populated
UOM1	No	Auto Populated
Qty2	No	Auto Populated
Tax Amount in Doc Currency	No	Auto Populated
Area Occupied	Yes	Auto Populated
Cargo Volume	Yes	Auto Populated
Vessel Trade (Foreign /Coastal)	No	Auto Populated
Cargo Value CIF	No	Auto Populated
Cargo Value FOB	No	Auto Populated
Rebate Rate Per Unit (2 Decimals)	No	Auto Populated
Rebate Total Amount	No	Auto Populated
Service Amount After Rebate	No	Auto Populated
Service Type Code	No	Auto Populated
Trade Type	No	Auto Populated
Vessel Name	No	Auto Populated
Unit Rate	No	Auto Populated
Total Amount	No	Auto Populated
Short Text For Sales Order Item	No	Auto Populated
Attachment Type Name	No	Form lookup/Auto Populated
Attachment Name	No	Form lookup/Auto Populated
Certificate Valid From D&T	No	Calendar/Auto Populated
Certificate Valid To D&T	No	Calendar/Auto Populated
Certificate Name	No	Auto Populated

Step 3: Click on the ⬚ icon. Then the user will be redirected to the Attachments Window. –

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User Interface Image 423 – CONFIRMATION OF CHARGES-VESSEL 61.3.

Step 4: Click on attachment icon if any attachment are configured it will auto populate or Click on + Add files fill the required fields and upload the documents if any through Upload button and can download the attached document by clicking on the file name attached.

User Interface Image 424 – CONFIRMATION OF CHARGES-VESSEL 61.5.4

Step 5: Click on attachment icon if any attachment are configured it will auto populate or Click on + Add files fill the required fields and upload the documents if any through Upload button and can download the attached document by clicking on the file name attached.

Step 6: The record that can be seen in ≡ as shown below

User Interface Image 425 – CONFIRMATION OF CHARGES-VESSEL 61.5.5

Step 7: Click on icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

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Search ✕

Field	Condition	Value1	Value2	Concatenate Condition
▼	▼	search....	search....	and ▼

⊕ Add Row

Clear ✕   Search 🔍

By Clicking on 🔽 can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

46. BUSINESS FUNCTION NAME: CONFIRMATION OF CHARGES-RAILWAY

46.1   DEFINITION:

46.2   NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ▦ SELECTION TO VIEW THE LIST DATA AND TO ADD NEW RECORDS.

Menu Path	Menu Bar → Billing→ Transactions→ Confirmation of Charges-Railway→ Click on New button 📄

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH BOX 🔍 WHICH IS AVAILABLE ON TOOL BAR SECTION.

46.3   PREREQUISITES – MASTERS

46.4   SCREENSHOT

Following screenshot from CONFIRMATION OF CHARGES-RAILWAY

Step 1- Click on any record in List Data. The user shall redirect to the screen like below-

User Interface Image 421 – CONFIRMATION OF CHARGES-RAILWAY61.5.1

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User Interface Image 422 – CONFIRMATION OF CHARGES-RAILWAY 61.5.2

Below are the Field Information regarding Confirmation Charges Railway Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Sales Doc No	No	Auto Populated
VCN No	No	Auto Populated
Trade Type	No	Auto Populated
Total Amount	No	Auto Populated
Bill to Party Name	No	Auto Populated
Vessel Name	No	Auto Populated
Vessel GRT	No	Auto Populated
Agent Name	No	Auto Populated
IMO No	No	Auto Populated
Net Amount	No	Auto Populated
Service Category	No	Auto Populated
Voyage No	No	Auto Populated
Tax Amount	No	Auto Populated
Qty1	Yes	Auto Populated
UOM1	No	Auto Populated
Qty2	No	Auto Populated
Tax Amount in Doc Currency	No	Auto Populated
Area Occupied	Yes	Auto Populated
Cargo Volume	Yes	Auto Populated
Vessel Trade (Foreign /Coastal)	No	Auto Populated
Cargo Value CIF	No	Auto Populated
Cargo Value FOB	No	Auto Populated
Rebate Rate Per Unit (2 Decimals)	No	Auto Populated

Rebate Total Amount	No	Auto Populated
Service Amount After Rebate	No	Auto Populated
Service Type Code	No	Auto Populated
Trade Type	No	Auto Populated
Vessel Name	No	Auto Populated
Unit Rate	No	Auto Populated
Total Amount	No	Auto Populated
Short Text For Sales Order Item	No	Auto Populated
Attachment Type Name	No	Form lookup/Auto Populated
Attachment Name	No	Form lookup/Auto Populated
Certificate Valid From D&T	No	Calendar/Auto Populated
Certificate Valid To D&T	No	Calendar/Auto Populated
Certificate Name	No	Auto Populated

Step 3: Click on the 📎 icon. Then the user will be redirected to the Attachments Window. –

User Interface Image 423 – CONFIRMATION OF CHARGES-RAILWAY 61.3.

Step 4: Click on attachment icon if any attachment are configured it will auto populate or Click on **+ Add files** fill the required fields and upload the documents if any through **Upload** button and can download the attached document by clicking on the file name attached.

User Interface Image 424 – CONFIRMATION OF CHARGES-RAILWAY 61.5.4

Step 5: Click on attachment icon if any attachment are configured it will auto populate or Click on

+ Add files fill the required fields and upload the documents if any through **Upload** button and can download the attached document by clicking on the file name attached.

Step 6: The record that can be seen in ≡ as shown below

User Interface Image 425 – CONFIRMATION OF CHARGES-RAILWAY 61.5.5

Step 7: Click on icon to new popup window will display. And can Close / Clear / Search the records with multiple inputs.

By Clicking on can clear the inputs in the columns. By Clicking on Results / reset Drop down can select 10/20/30/40 records to view in List page.

47. BUSINESS FUNCTION NAME: RAKE APPLICATION (RA)

47.1   DEFINITION

Rake Application (RA) purpose is to Consignee/Consignor/Railway handling agent (RHA) will request to bring cargo inside the port or will request for cargo delivery through rail.

The Registered Consignee/Consignor/Railway handling agent (RHA) will be using this function. In case the agent is unable to file the Rake Application (RA) via the portal, then he can file the RA at the port designated counter.

47.2   NAVIGATION:

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU [image] SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar →Railways→ Rake Application→ Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA [image] AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

47.3   PREREQUISITES – MASTERS:

S. No	Master List
1.	Station
2.	Cargo
3.	UOM
4.	Owning Railway
5.	Wagon Type
6.	Yard
7.	Handling Method
8.	Agent

47.4 SCREENSHOT

Following screenshot from Rake Application

Once entered into the Functional Form – Rake Application, list page will appear

List Page:

User Interface Image 1-Rake Application- 1.5.1

➢ To enter into the Rake Application New Page, click on Add New button from tool bar

47.4.1 Rake Application Form Details - Inward

Header Details:
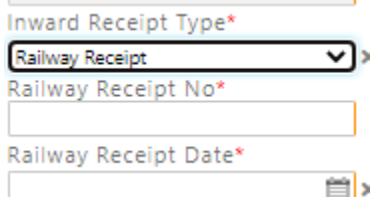
Step 1 -Once clicked on Add New button from top of the tool bar, Rake Application Header Details screen will appear like below

User Interface Image 1-Rake Application Header Details- 1.5.1.1

➢ Select Application Type from drop down list, whether it is Inward or Outward
➢ Select cargo related to from drop down list whether it is import cargo, domestic cargo ,newly build wagon

➢ Select Load Type Require from drop down list, whether it is Train Load or Wagon Load
If Application Type as **"Inward"** and Load Type Require as **"Train Load or Wagon Load"** then following details will appear to enter:

➢ Select From Station from Look-up button
➢ Select To Station from Look-up button
➢ Select Via Station from Look-up button, but it is not mandatory to select
➢ Select Consignee from Look-up button
➢ Select Consignor from Look-up button
➢ Select Railway Handling Agent from Look-up button
➢ Select Billing Agent from Look-up button
➢ Select Inward Receipt Type from drop down list, whether it is Railway Receipt or Indemnity Bond or none.
  o If User select Inward Receipt Type as "Railway Receipt", then system shows the fields as Railway Receipt No. and Railway Receipt Date for entering

  o If User select Inward Receipt Type as Indemnity Bond, then system shows the fields as Indemnity Bond No. and Indemnity Bond Date for entering

Inward Receipt Type*
Indemnity Bond
Indemnity Bond No*

Indemnity Bond Date*

➤ Select demand type require from drop down list e- demand , manual demand

      1. If user selects e-demand then system field shows the field as e-demand no. , e-demand date

E-Demand No*

E-Demand Date*

      2. If user selects manual demand system field shows the field as manual demand no., manual   date

Manual Demand No*

Manual Demand Date*

➤ Select wagon covering required system field options give (yes /no)
➤ The fields like Manual Indent No. , Wagon Registration Fee Amount, PD Account Balance is not mandatory fields.

➤ The field of shore handling charges has options (yes /no).

The field "Rake Application No" which will be auto populated after approval of the form
➤ Enter the Remarks if any
➤ Doc No., Doc Series, Doc Date, Status Code, Doc Approved Date, and Source fields are auto populated by the system

Step 2 – Once all the necessary fields are filled, click **Next** button from the bottom of the page. Then vessel /Cargo Details page redirected as like below

Click on ⊕ Add Row to begin with data entry

User Interface Image 2-Rake Application Cargo details - 1.5.1.2

Step 3 – Once ⊕ Add Row is selected, then following vessel/Cargo Details line item fields will be populated to enter
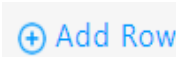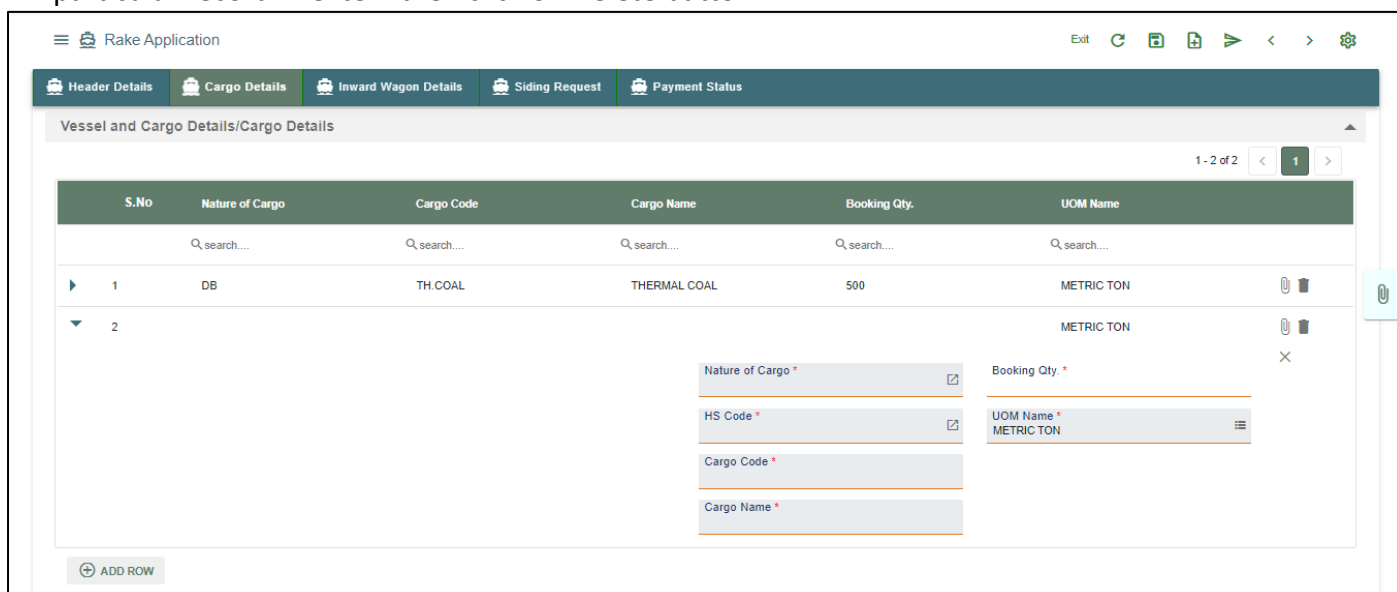
User Interface Image 3-Rake Application Cargo details - 1.5.1.3

➢ Once fields are populated, select the Nature of Cargo and from Lookup button
➢ Select HS code from Lookup button
➢ Once Selected HS Code, Description will be populated by the system
➢ Cargo code , cargo name are both re mandatory fields
➢ Enter Booking Quantity of cargo.
➢ System shown by default UOM will be Metric Ton. If want to change, then select from Lookup button
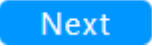
Step 4 - Once data is filled in Line item Details, click on save button [icon] to save the cargo details record and click on ⊕ Add Row if need to add multiple Row's or else click on [icon] button to save the complete Rake Application entered details
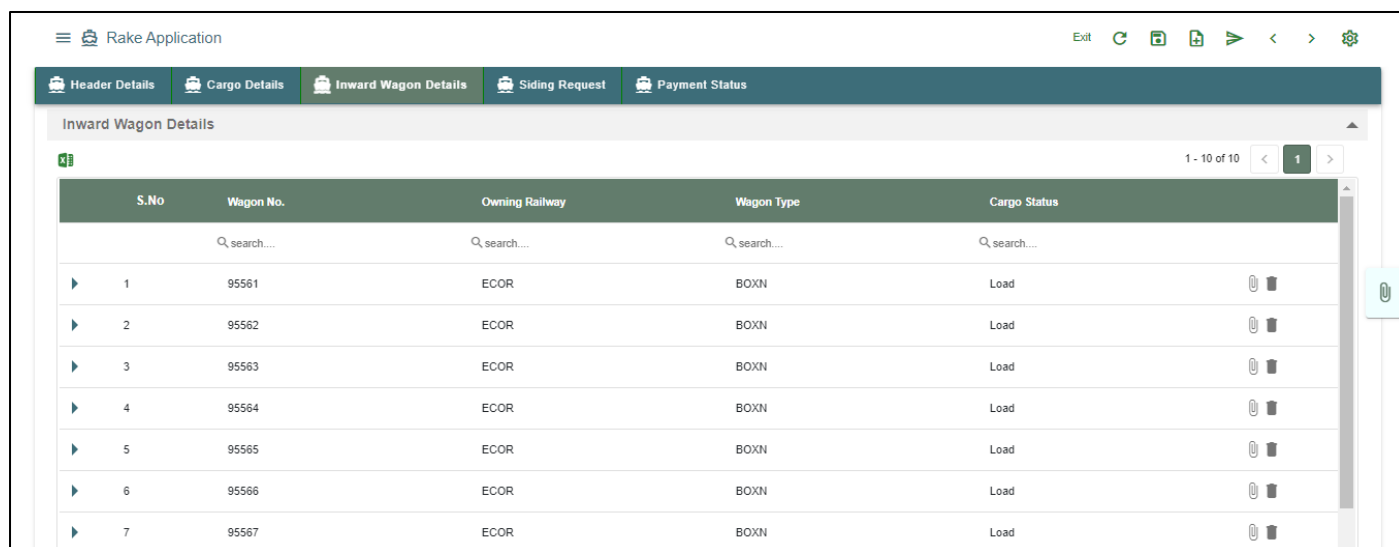
➢ If any want to update the previous cargo details line item which is already saved then click on expansion button ∨ to update the details and click on save button [icon]. If want to delete the particular record line item then click on Delete button 🗑

User Interface Image 4 - Rake Application Cargo details-1.5.1.4

Step 5 – Once all the necessary fields are filled, click **Next** button from the bottom of the page. Then Inward Wagon Details page redirected as like below
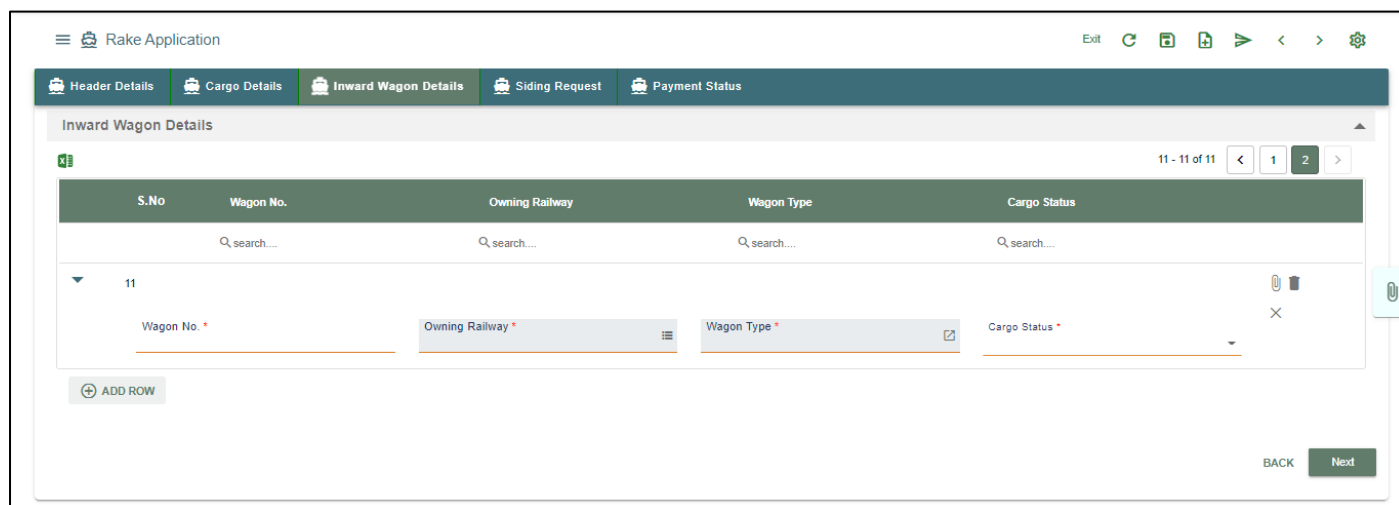
Click on ⊕ Add Row to begin with data entry

User Interface Image 5- Rake Application Inward wagon details -1.5.1.5

Step 6 – Once ⊕ Add Row is selected, and then following Inward Wagon Details line item fields will be populated to enter
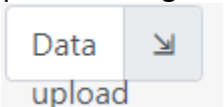
User Interface Image 6- Rake Application Inward wagon details -1.5.1.6
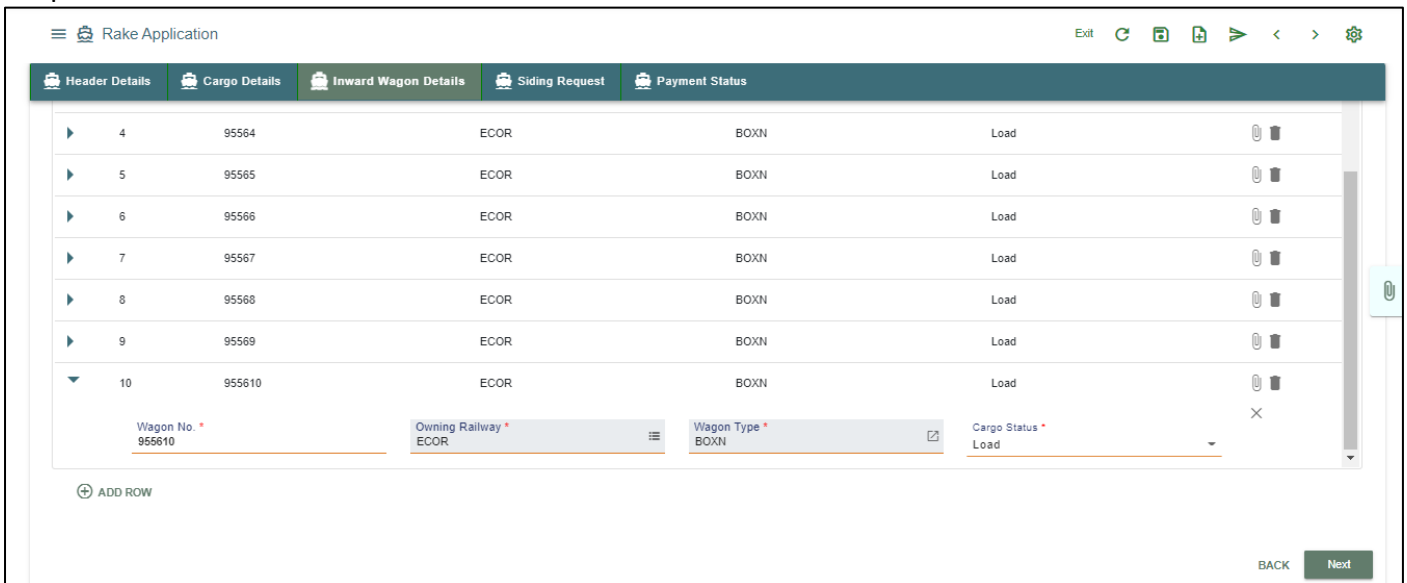
➢ If it integrated with FOIS, then system will auto populate all Inward Wagon Details in the line.
➢ Enter Inward Wagon Number at Wagon Number field.
➢ Select Owning Railway from Lookup button
➢ Select Wagon Type from Lookup button
➢ Select cargo status an mandatory filed drop down list choose load or empty
➢ System have option for wagons upload. If want to upload the inward wagon details, then click on

upload button [Data upload] to select the destination file
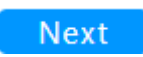
Step 7 - Once data is filled in Line item Details, click on save button [icon] to save the inward wagon details record and click on ⊕ Add Row if need to add multiple Row's or else click on [icon] button to save the complete Rake Application entered details
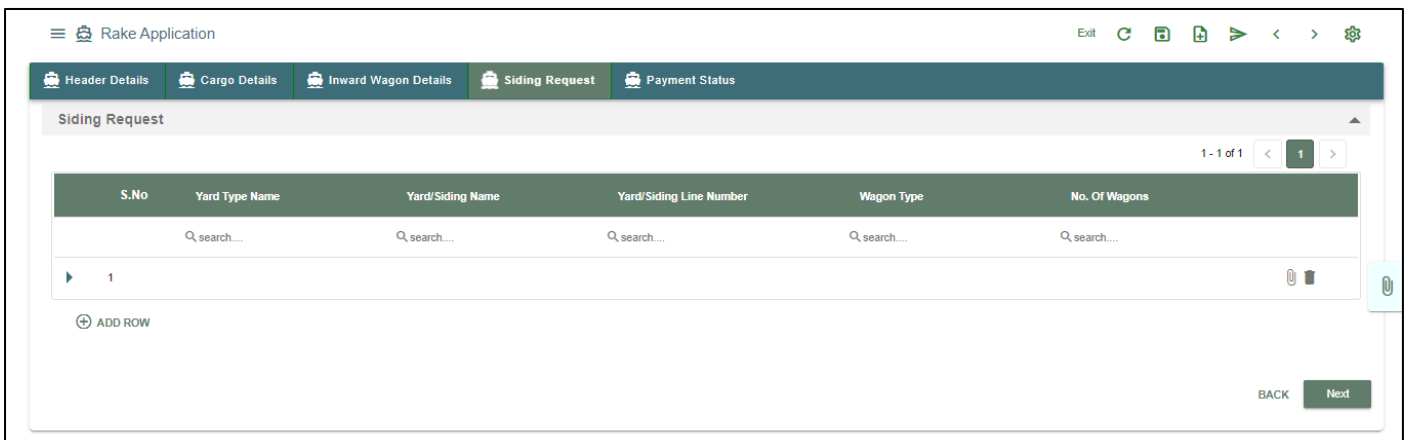
➢ If any want to update the previous inward wagon details line item which is already saved then click on expansion button ⌄ to update the details and click on save button [icon]. If want to delete the particular record line item then click on Delete button 🗑
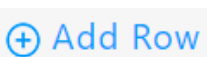
User Interface Image 7- Rake Application Inward wagon details-1.5.1.7
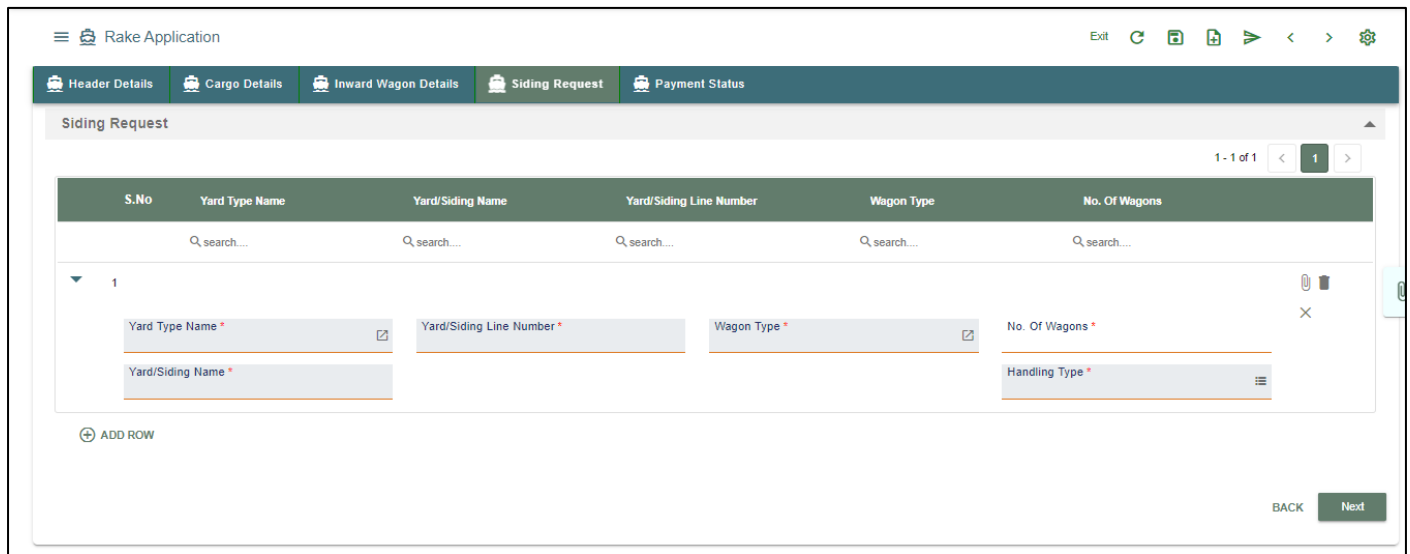
Step 8 – Once all the necessary fields are filled, click **Next** button from the bottom of the page. Then sliding request - page redirected as like below
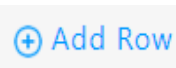
User Interface Image 8- Rake Application siding request-1.5.1.8

➢ Click on ⊕ Add Row to begin with data entry
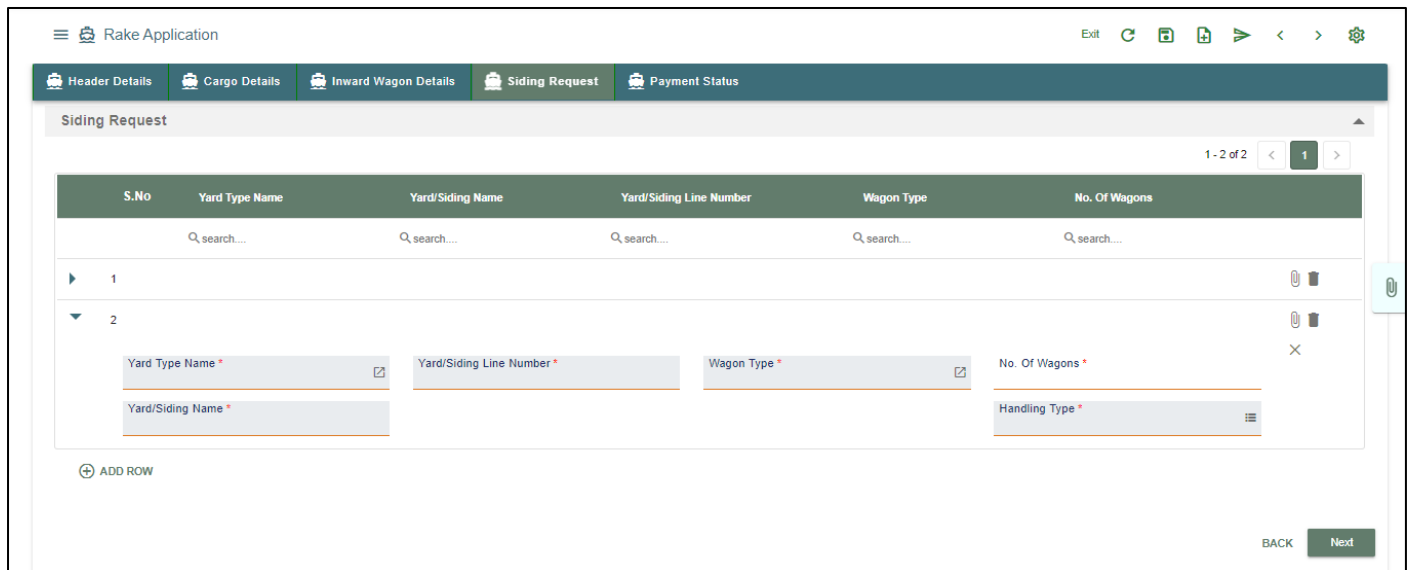
User Interface Image 9- Rake Application siding request-1.5.1.9

➢ Select the Yard Type Name from Lookup button
➢ System will populate the fields which are Yard/Siding Name and Yard/Siding Line Number
➢ Select Wagon Type from Lookup button
➢ Enter No. of Wagons which wants to bring at particular selected siding details.

Step 11 - Once data is filled in Line item Details, click on save button to save the forwarding note

details record and click on Add Row if need to add multiple Row's or else click on button to save the complete Rake Application entered details

➢ If any want to update the previous Siding Request details line item which is already saved then click on

expansion button to update the details and click on save button . If want to delete the

particular record line item then click on Delete button

User Interface Image 10- Rake Application siding request-1.5.1.10

Step 11: Adding the files manually once the record got saved, Click on the [icon]. Then the user will be redirected to the popup window as below –

User Interface Image 11-Rake Application (Attachments) 1.5.11

Step 12: Click on [+ Add files] button/ Drag Files here, to upload , Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

User Interface Image 12-Rake Application (Attachments Documents) 1.5.12

Once all the mandatory and required fields are filled then Click on **Upload** button. System will display **File uploaded** status on the screen. Respective Form Name , Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [paperclip] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [paperclip] icon .

Respective Form Name, Section name will display to attach the documents*File Required.

SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
	Attachments (2)					**X**
Vessel Registration						
☐ 1.	Cargo Related Documents	Azure				*File Required
Vessel Registration P & I						
☐ 1.	Vessel Related Documents	Cargo Declaration (FAL form 2)				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload   **Close**

Now click on the Check boxes accordingly, and then Select files button will be enabling.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload** button. System will display the status **File uploaded** on the screen.

Click On Close Button

Step 13: Click on the Save button ![save icon] from the top right corner to save the Rake Application Form. Once the record got saved successfully, then the system will display ![Record saved] message.

Step 14: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ![workflow icon] .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step 15: Once the workflow is initiated click on ![icon] the icon.System will be display ![Send user Profile for Approval] with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step 16: Once the user Approve the request the following ![Successfully Status changed to WFAPP] status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user rejects the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 17: Once the workflow is in WFAPP. Click on the icon. System will be displaying **Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval
ⓘ Send user Profile for Approval
ⓘ Change status of the record
Remarks:

Approve   Reject

Step 18: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user rejects the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 19: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert ok and Back

Alert Message   X
ⓘ Do you want to cancel?
Ok   Back

By Clicking on Back we can go to the previous screen. By clicking Ok we can see the below fields in Alert.

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By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to CANCEL

Step 20: Upon Save / Approve /Reject /Cancel the record that can be seen in **List Data** as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 14-Rake Application (List Data) 1.5.13

47.4.2 Rake Application Form Details - Outward

Header Details:

Step 1 - Once clicked on Add New button from top of the tool bar, Rake Application Header Details screen will appear like below
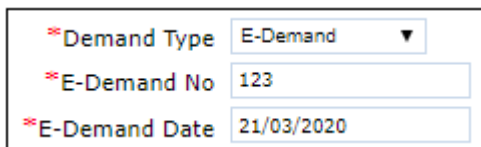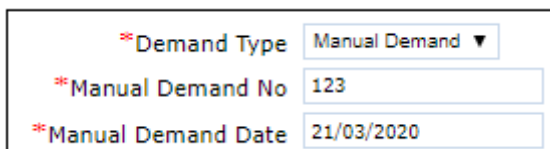
User Interface Image 14-Rake Application-1.5.2.1

➢ Select Application Type from drop down list, whether it is Inward or Outward
➢ Select Load Type Require from drop down list, whether it is Train Load or Wagon Load

If Application Type as **"Outward",** Cargo related to as **"Import Cargo/domestic cargo/newly build wagon"** and Load Type Require as **"Train Load or Wagon Load"** then following details will appear to enter:

➢ Select From Station from Look-up button
➢ Select To Station from Look-up button
➢ Select Via Station from Look-up button, but it is not mandatory to select
➢ Select Consignee from Look-up button
➢ Select Consignor from Look-up button
➢ Select Railway Handling Agent from Look-up button
➢ Select wagon covering and choose (yes / no)
➢ Select Billing Agent from Look-up button
➢ Select Demand Type from drop down list, whether it is E-Demand or Manual Demand
  o If User select Demand Type as "E-Demand", then system shows the fields as E-Demand No. and E-Demand Date for entering

  o If User select Demand Type as "Manual Demand", then system shows the fields as Manual Demand No. and Manual Demand Date for entering
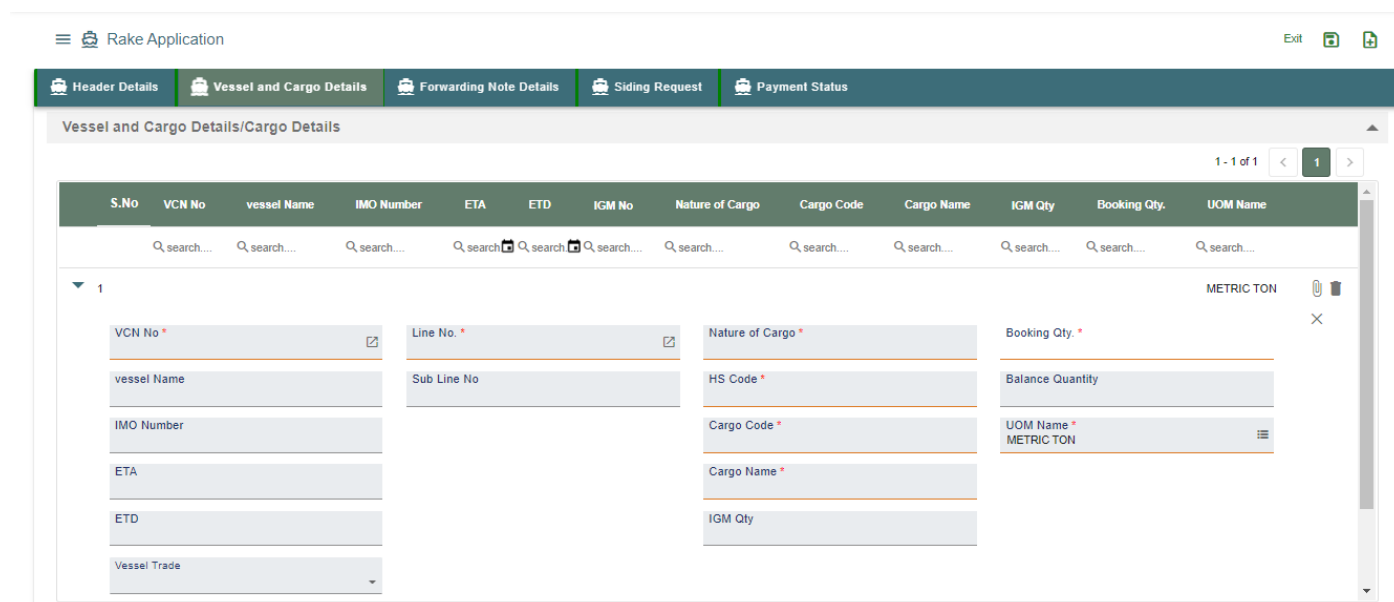
➢ Enter Wagon Registration Fee Amount if any. It is not mandatory field to enter

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➢ Select Shore Handling Charges Paid from drop down button, whether charges paid "Yes or No". But it is not mandatory field to enter
➢ Select Wagon Covering Required from drop down button, whether it is "Yes or No".
➢ The field "Rake Application No" which will be auto populated after approval of the form
➢ Doc No., Doc Series, Doc Date, Status code, Doc Approved Date, and Source fields are auto populated by the system
➢ Enter the Remarks if any.

Step 2 – Once all the necessary fields are filled, click **Next** button from the bottom of the page. Then Vessel and Cargo Details page redirected as like below
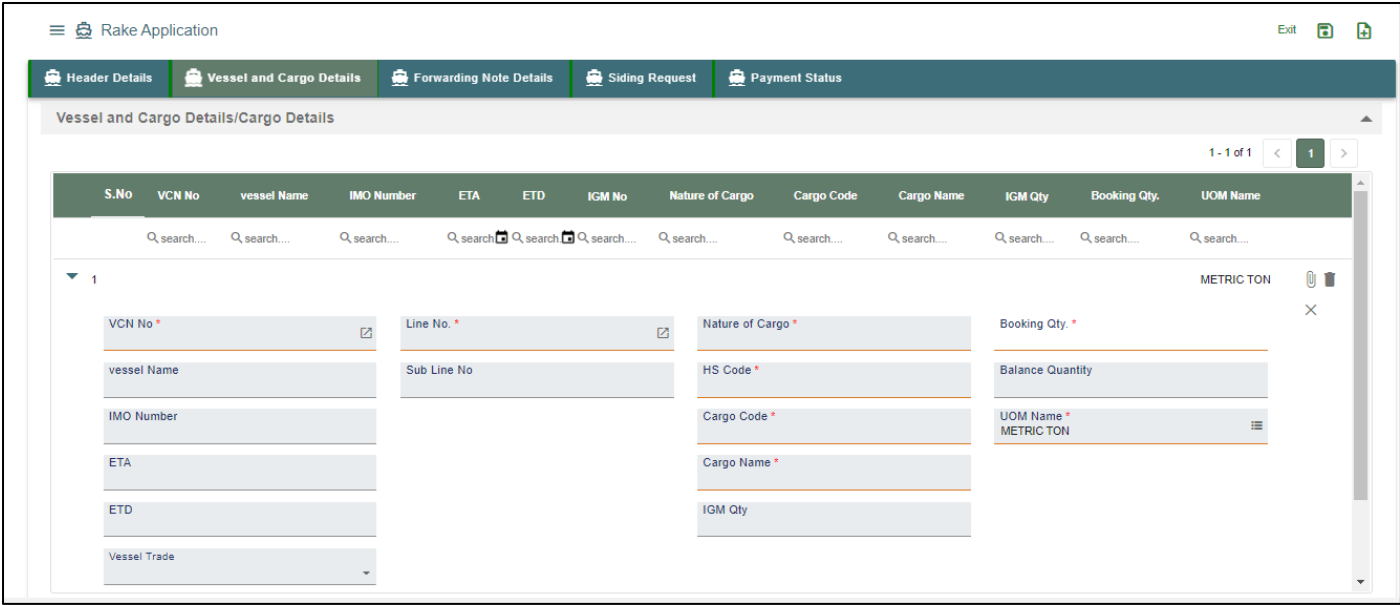
Click on ⊕ Add Row to begin with data entry

User Interface Image 15- Rake Application-1.5.2.2

Step 3 – Once ⊕ Add Row is selected, then following Vessel and Cargo Details line item fields will be populated to enter

User Interface Image 16- Rake Application-1.5.2.3

- Once fields are populated, select the VCN from Lookup button
- Based on the selection of VCN, the fields Vessel Name, IMO Number, ETA and ETD will be auto populated
- Select Bill of Entry (BE) No from Lookup button
- Based on the selection of BE No, the fields Out of charge (OOC) No, Out of charge (OOC) quantity and Nature of cargo will be auto populated
- Select Cargo Code from Lookup button
- Based on the selection of Cargo Code, the field Cargo Description will be auto populated
- Enter Booking Quantity based on Out of charge (OOC) quantity
- System shows UOM field by default Metric Ton. If want to change, select UOM from Lookup button
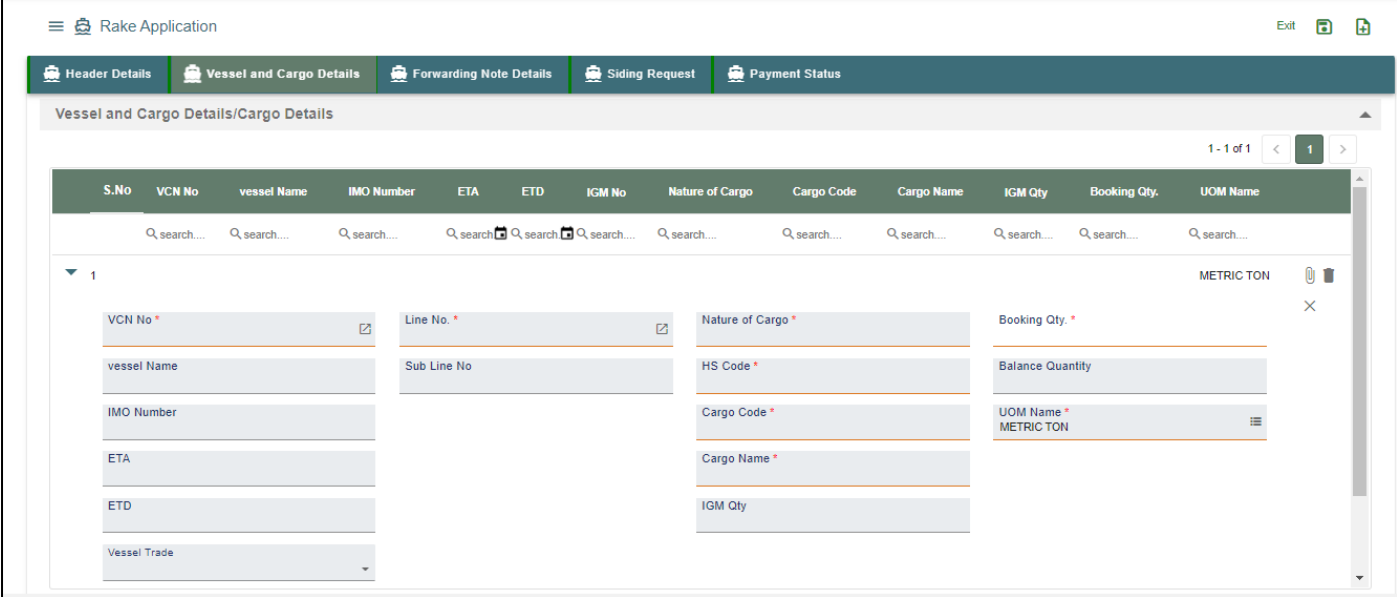
Step 4 - Once data is filled in Line item Details, click on save button to save the cargo details record and click on if need to add multiple Row's or else click on button to save the complete Rake Application entered details

- If any want to update the previous cargo details line item which is already saved then click on expansion button to update the details and click on save button . If want to delete the particular record line item then click on Delete button

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User Interface Image 17- Rake Application-1.5.2.4

Step 5– Once all the necessary fields are filled, click **Next** button from the bottom of the page. Then forwarding note details page redirected as like below

User Interface Image 18- Rake Application-1.5.2.5
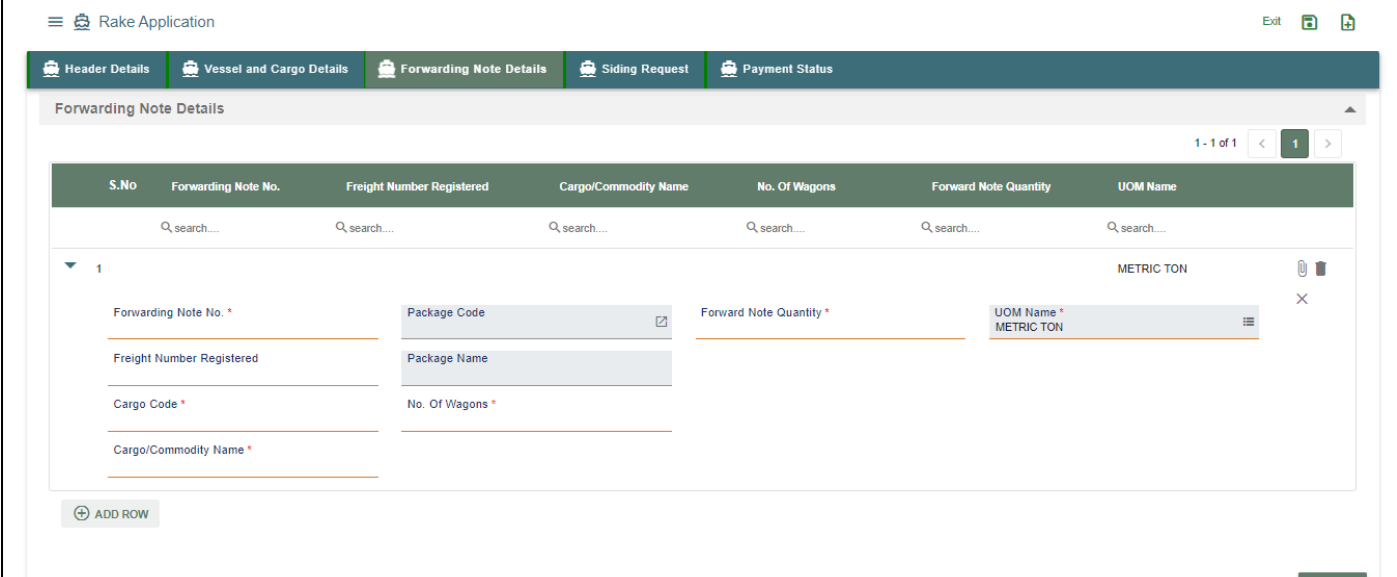
Click on ⊕ Add Row to begin with data entry

User Interface Image 19- Rake Application-1.5.2.6

- ➢ Once fields are populated, Enter Forwarding Note No
- ➢ Enter Freight Number Registered. But it is not mandatory field to enter
- ➢ Select Cargo/Commodity Name from Lookup button
- ➢ Enter No. of wagons which is categorized against Forwarding Note No entered
- ➢ Enter Quantity which is categorized against Forwarding Note No entered
- ➢ System shows UOM field by default Metric Ton. If want to change, select UOM from Lookup button

Step 7 - Once data is filled in Line item Details, click on save button to save the Forwarding Note details record and click on ⊕ Add Row if need to add multiple Row's or else click on button to save the complete Rake Application entered details

- ➢ If any want to update the previous Forwarding Note details line item which is already saved then click on expansion button ⌄ to update the details and click on save button . If want to delete the particular record line item then click on Delete button 🗑

User Interface Image 20- Rake Application-1.5.2.7

Step 8 – Once all the necessary fields are filled, click **Next** button from the bottom of the page. Then sliding request - page redirected as like below
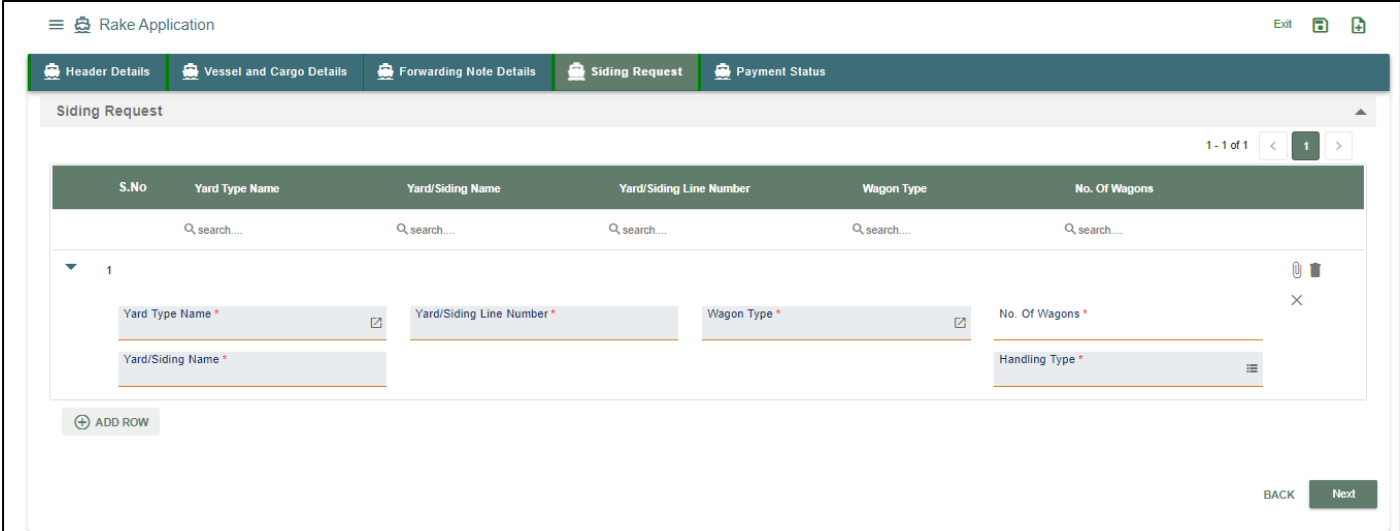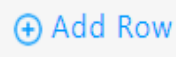
User Interface Image 21- Rake Application siding request-1.5.2.8
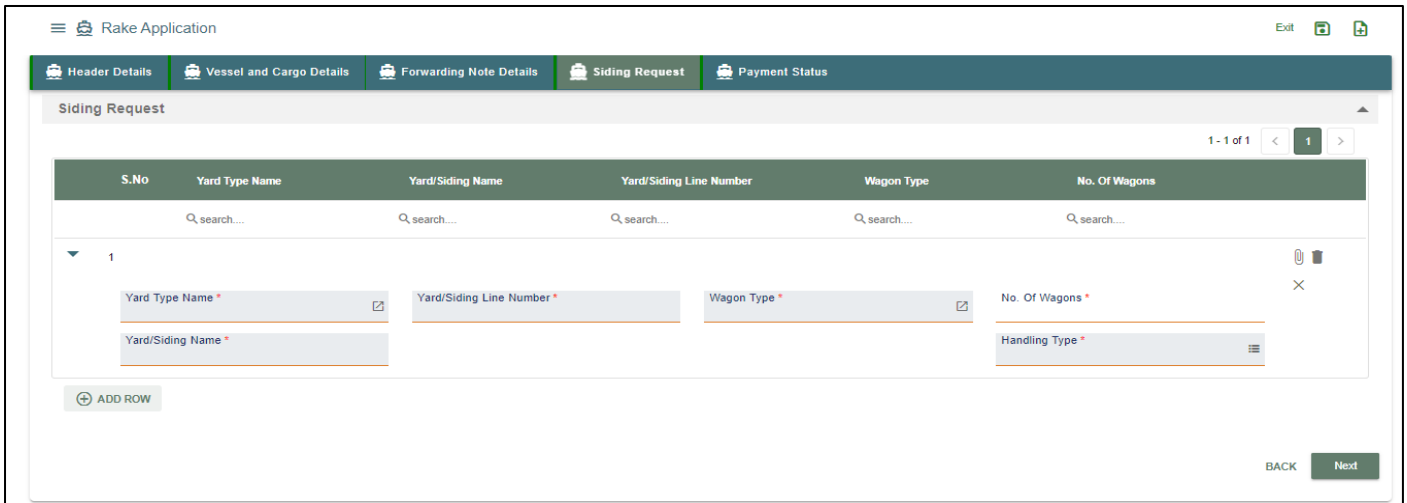
➢ Click on ⊕ Add Row to begin with data entry

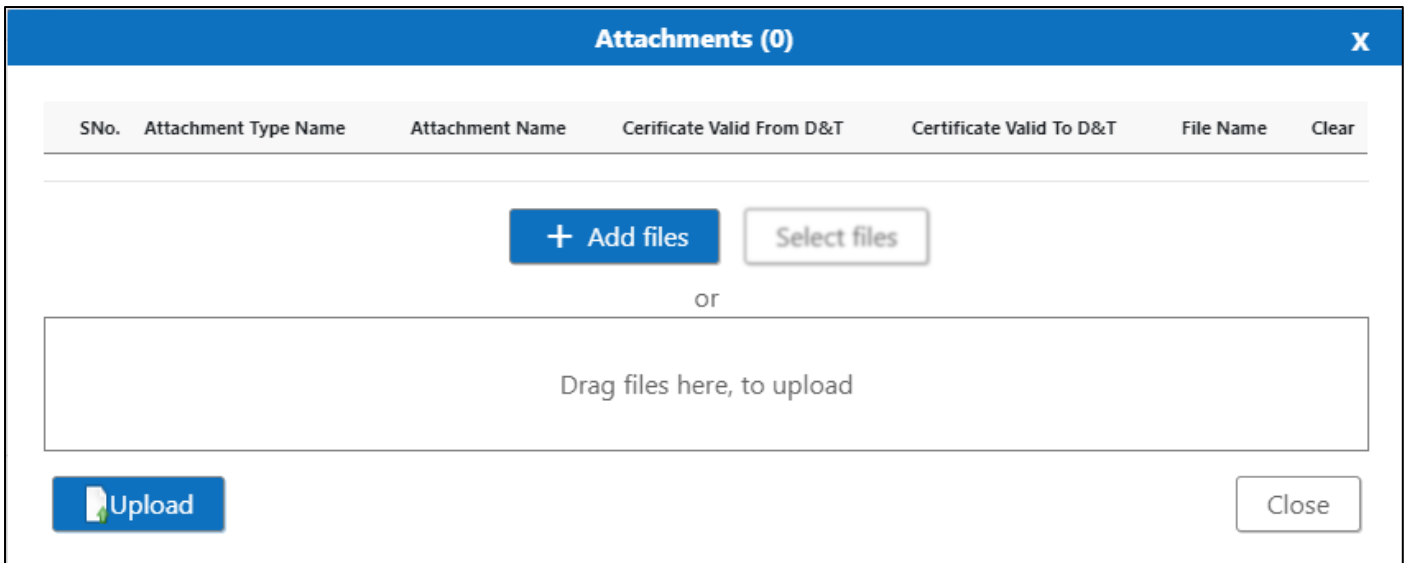*User Interface Image 22- Rake Application siding request-1.5.2.9*

- ➢ Select the Yard Type Name from Lookup button
- ➢ System will populate the fields which are Yard/Siding Name and Yard/Siding Line Number
- ➢ Select Wagon Type from Lookup button
- ➢ Enter No. of Wagons which wants to bring at particular selected siding details.

Step 11 - Once data is filled in Line item Details, click on save button to save the forwarding note details record and click on ⊕ Add Row if need to add multiple Row's or else click on button to save the complete Rake Application entered details

- ➢ If any want to update the previous Siding Request details line item which is already saved then click on expansion button ∨ to update the details and click on save button . If want to delete the particular record line item then click on Delete button

User Interface Image 23- Rake Application siding request-1.5.2.10

Step 11: Adding the files manually once the record got saved, Click on the [paperclip] icon. Then the user will be redirected to the popup window as below –

User Interface Image 24-Rake Application (Attachments) 1.5.2.11

Step 12: Click on [+ Add files] button/ Drag Files here, to upload , Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

User Interface Image 25-Rake Application (Attachments Documents) 1.5.12

Once all the mandatory and required fields are filled then Click on **Upload** button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [attachment icon] icon .

Respective Form Name, Section name will display to attach the documents*File Required.

SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration						
1.	Cargo Related Documents	Azure				*File Required
Vessel Registration P & I						
1.	Vessel Related Documents	Cargo Declaration (FAL form 2)				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload   Close

Now click on the Check boxes accordingly, and then Select files button will be enabling.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload** button. System will display the status **File uploaded** on the screen.

Attachments (2)   X

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☐	1.	Cargo Related Documents	Azure	02-03-2021 15:45:50	18-03-2021 15:45:51	📄 Sample__1_.docx	🗑
Vessel Registration P & I							
☐	1.	Vessel Related Documents	Cargo Declaration				*File Required

+ Add files   **Select files**

or

SNo.	Attachment Type Name*	Attachment Name*	Cerificate Valid From D&T*	Certificate Valid To D&T*	Certificate Name*	Clear
1.	▤		📅	📅 Sample (2).docx (9.62 kb)		⊗

Upload   **Close**

Click On Close Button

Attachments (4)   X

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☐	1.	General Document	AAA	02-03-2021 15:49:43	23-03-2021 15:49:44	📄 Sample__2_.docx	🗑
☐	2.	Cargo Related Documents	Azure	02-03-2021 15:45:50	18-03-2021 15:45:51	📄 Sample__1_.docx	🗑
☐	3.	General Document	AAA	02-03-2021 15:50:05	31-03-2021 15:50:06	📄 __Sample__2_.doc	🗑

+ Add files   **Select files**

or

Drag files here, to upload

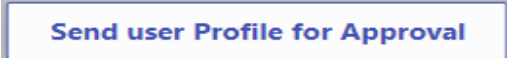**Upload**   **Close**

Step 13: Click on the Save button 💾 from the top right corner to save the Rake Application Form. Once

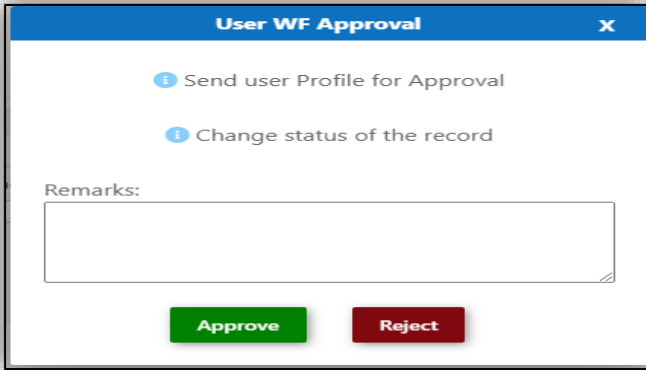the record got saved successfully, then the system will display ✅ **Record saved** message.

Step 14: Once the record is saved then the document status will be as 'Draft' and then click on workflow

button 🔶 .

Choose an option ✕

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step 15: Once the workflow is initiated click on 🔶 the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either
'Approve' or 'Reject' with reason (Remarks).

User WF Approval ✕

ℹ️ Send user Profile for Approval

ℹ️ Change status of the record

Remarks:

[ ]

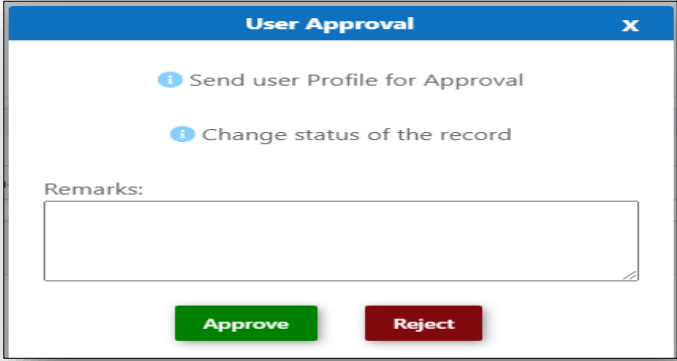**Approve** **Reject**

Successfully Status changed to WFAPP

Step 16: Once the user Approve the request the following status will be
shown on the screen and the document status will be changed as 'WFAPP'. .

If user rejects the request following alert will display on the screen. **Successfully rejected.** And the
document status will be changed as 'REJECTED'.

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Step 17: Once the workflow is in WFAPP. Click on ⬚ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).
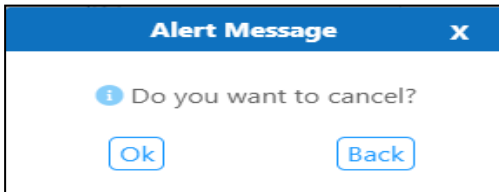
User Approval   X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[   ]

Approve   **Reject**

Step 18: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject

the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

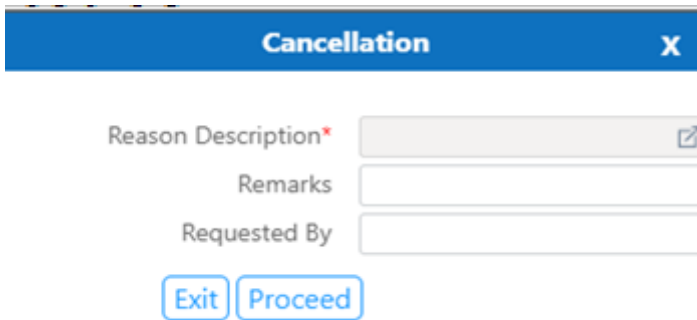**Step 19:** While if there is any changes or error we can cancel the record by clicking the ⬚ icon shown.

After clicking the icon system will display **Confirmation required** with below alert ok and Back

Alert Message   X

ⓘ Do you want to cancel?

[Ok]   [Back]

By Clicking on Back we can go to the previous screen. By clicking Ok we can see the below fields in Alert.

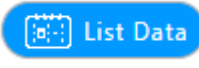**Cancellation**   X

Reason Description*   [   ] ⬚

Remarks   [   ]

Requested By   [   ]

[Exit] [Proceed]

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By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display Ok and status will change to CANCEL

Step 20: Upon Save / Approve /Reject /Cancel the record that can be seen in List Data as Draft/Approved/Rejected/Cancel Status respectively

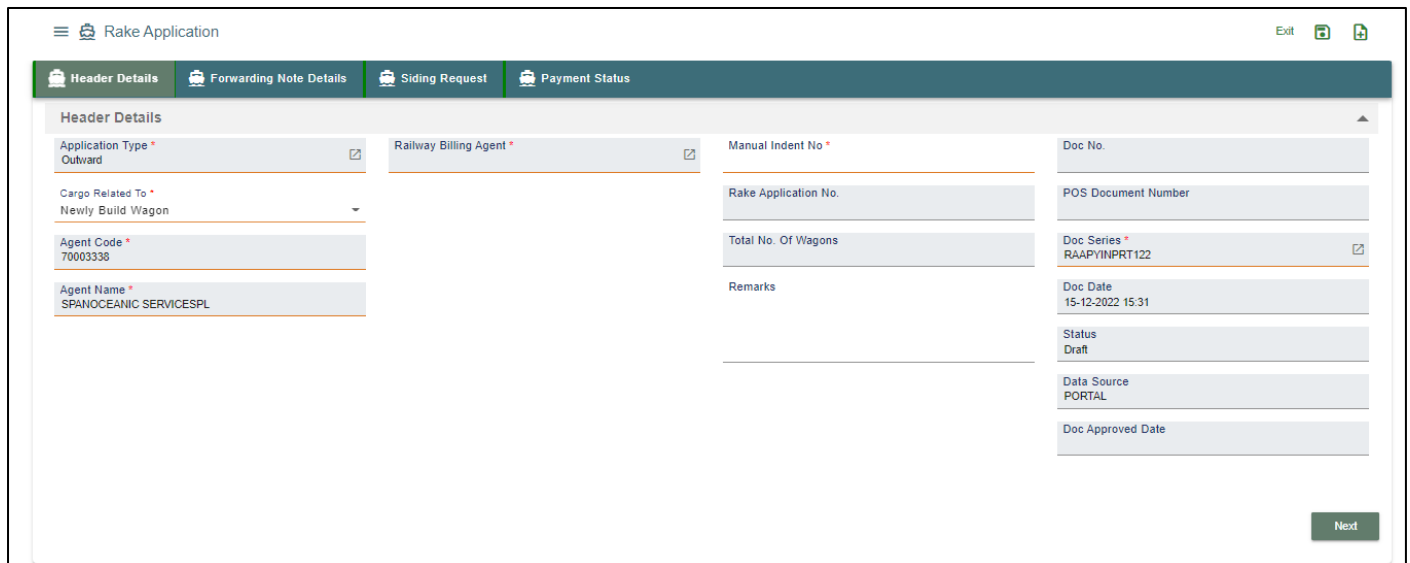| Doc No.	Status	Application Type	Rake Application No.	Cargo Related To	Load Type Require	From Station	To Station	Consignee N
search....	search....	search....	search....	search....	search....	search....	search....	search....
10078	Draft	Outward		Import Cargo	Train Load	CHENNAI PORT	MY HOME INDUSTRIES PRIVATE	CONTAINER C
10077	Submitted	Outward		Import Cargo	Train Load	CHENNAI PORT	JSW STEEL LIMITED SIDING,	SICAL LOGIST
NMAA120220010	Approved	Outward	IND/2022/0004	Import Cargo	Train Load	CHENNAI PORT	JSW STEEL LTD SIDING	SICAL LOGIST
NMAA120220009	Waiting for Cancel	Outward		Import Cargo	Train Load	CHENNAI PORT	JSW STEEL LTD SIDING	SICAL LOGIST
NMAA120220008	Approved	Inward	PER/2022/0005	Export Cargo	Train Load	JSW STEEL LTD SIDING	CHENNAI PORT	SICAL LOGIST
NMAA120220007	Approved	Inward	PER/2022/0004	Domestic Cargo	Train Load	JSW STEEL LIMITED SIDING,	CHENNAI PORT	SHERIF CARC
10071	Draft	Outward		Import Cargo	Train Load	CHENNAI PORT	MY HOME INDUSTRIES PRIVATE	BHARAT HEAV
NMAA120220006	Approved	Outward	IND/2022/0003	Import Cargo	Train Load	CHENNAI PORT	JSW STEEL LIMITED SIDING,	BHARAT HEAV
NMAA120220005	Approved	Inward	PER/2022/0003	Export Cargo	Wagon Load	JSW STEEL LIMITED SIDING,	CHENNAI PORT	BHARAT HEAV
10068	Draft	Inward			Train Load			

User Interface Image 26-Rake Application (List Data) 1.5.2.13

47.4.3 Rake Application Form Details - Newly Build Wagon

Header Details:

Step 1 - Once clicked on Add New button from top of the tool bar, Rake Application Header Details screen will appear like below
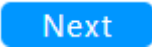
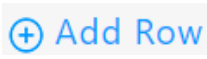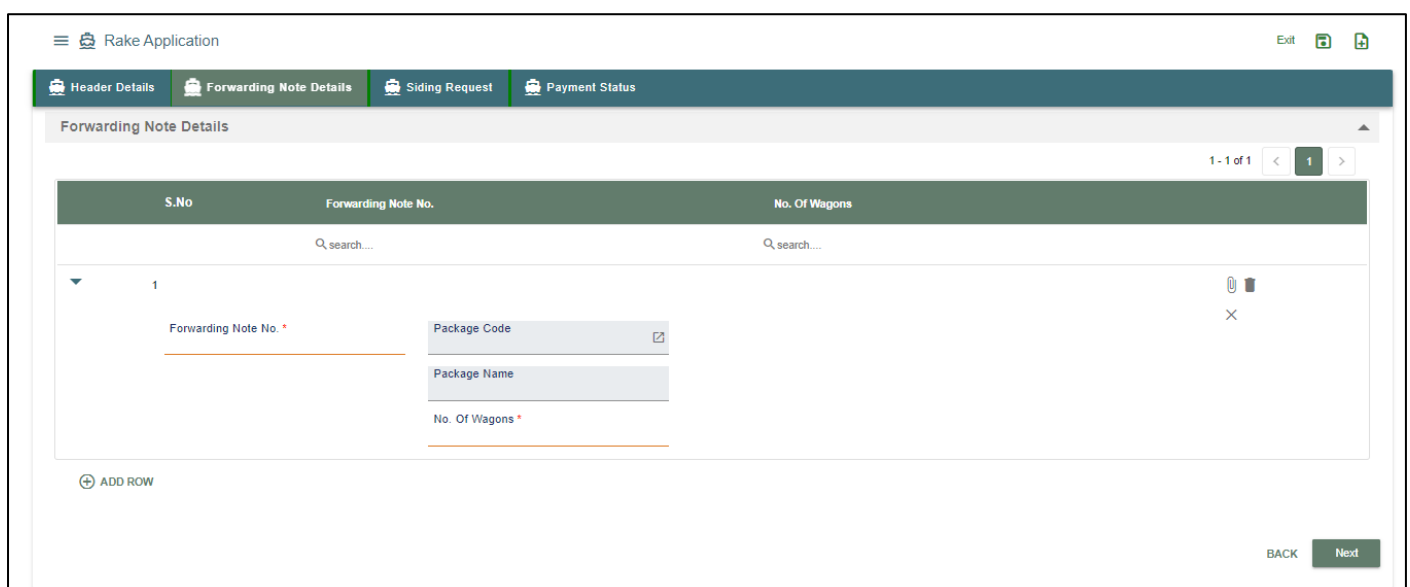Copy Right @ Envision Enterprise Solutions Pvt. Ltd.

User Interface Image 27- Rake Application-1.5.3.1

If Application Type as **"Outward",** Cargo Related To as **"Newly Build Wagon"** then following details will appear for entering:

➢ Select Billing Agent from Lookup Button
➢ The field "Rake Application No" which will be auto populated after approval of the form
➢ Enter the Remarks if any
➢ Doc No., Doc Series, Doc Date, Status Code, Doc Approved Date, and Source fields are auto populated by the system
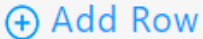
Step 2 – Once all the necessary fields are filled, click [Next] button from the bottom of the page. Then Forwarding Note page redirected as like below
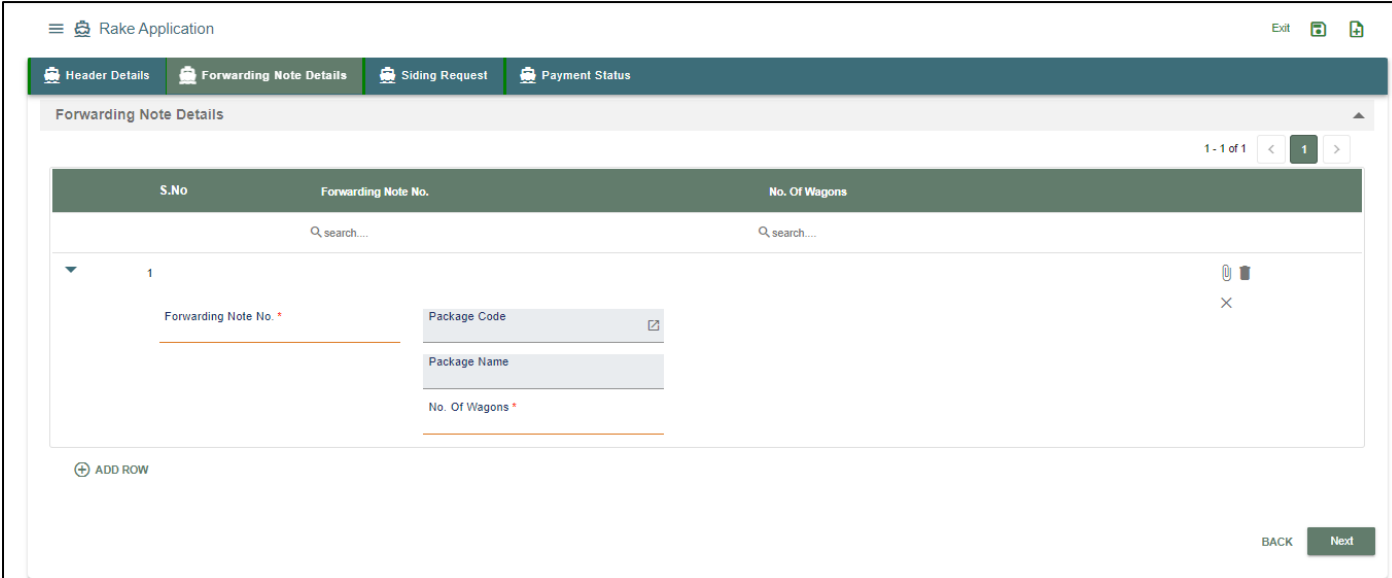
Click on [⊕ Add Row] to begin with data entry

User Interface Image 28- Rake Application-1.5.3.2

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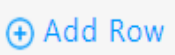**Step 3 –** Once ⊕ Add Row is selected, and then following Forwarding Note Details line item fields will be populated to enter

*User Interface Image 29- Rake Application-1.5.3.3*

➢ Enter Forwarding Note No.
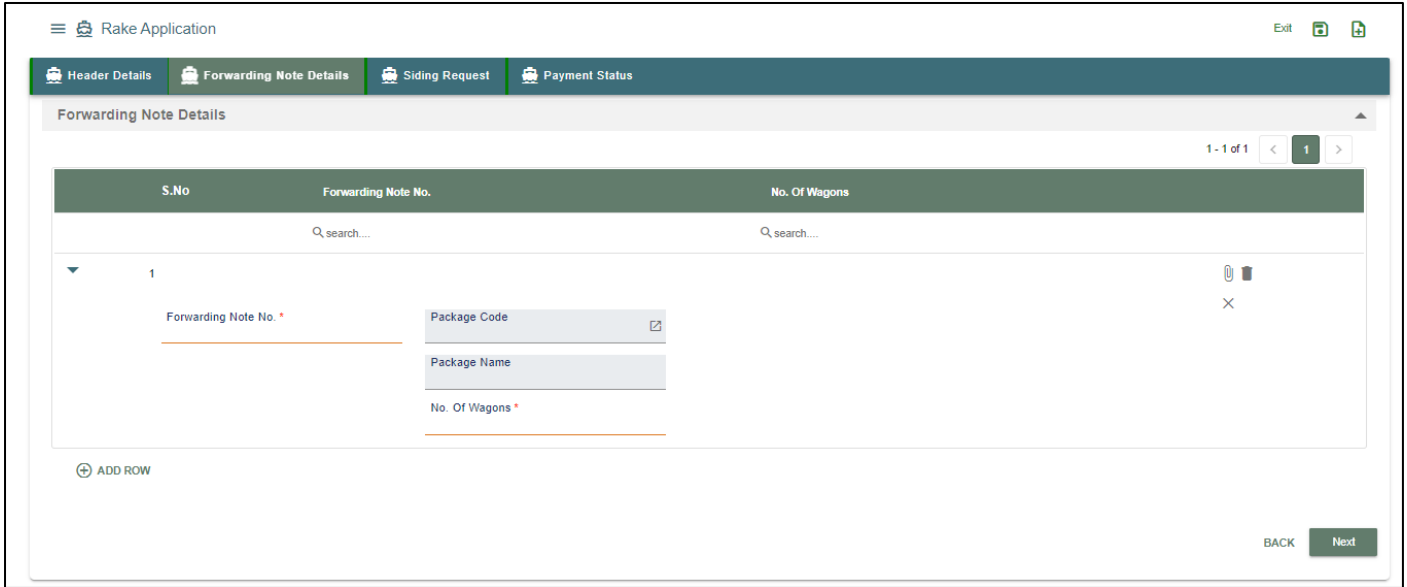➢ Enter No. of wagons which is categorized against Forwarding Note No. entered

Step 4– Once ⊕ Add Row is selected, then following siding request fields will be populated to enter

➢ Select yard type name mandatory field
➢ Then yard type siding name and yard siding line number will be automatically filled
➢ Select wagon type and number of wagons

Step 5 - Once data is filled in Line item Details, click on save button to save the siding request record and click on ⊕ Add Row if need to add multiple Row's or else click on button to save the complete Rake Application entered details

➢ If any want to update the previous siding request line item which is already saved then click on expansion button ∨ to update the details and click on save button . If want to delete the particular record line item then click on Delete button 🗑
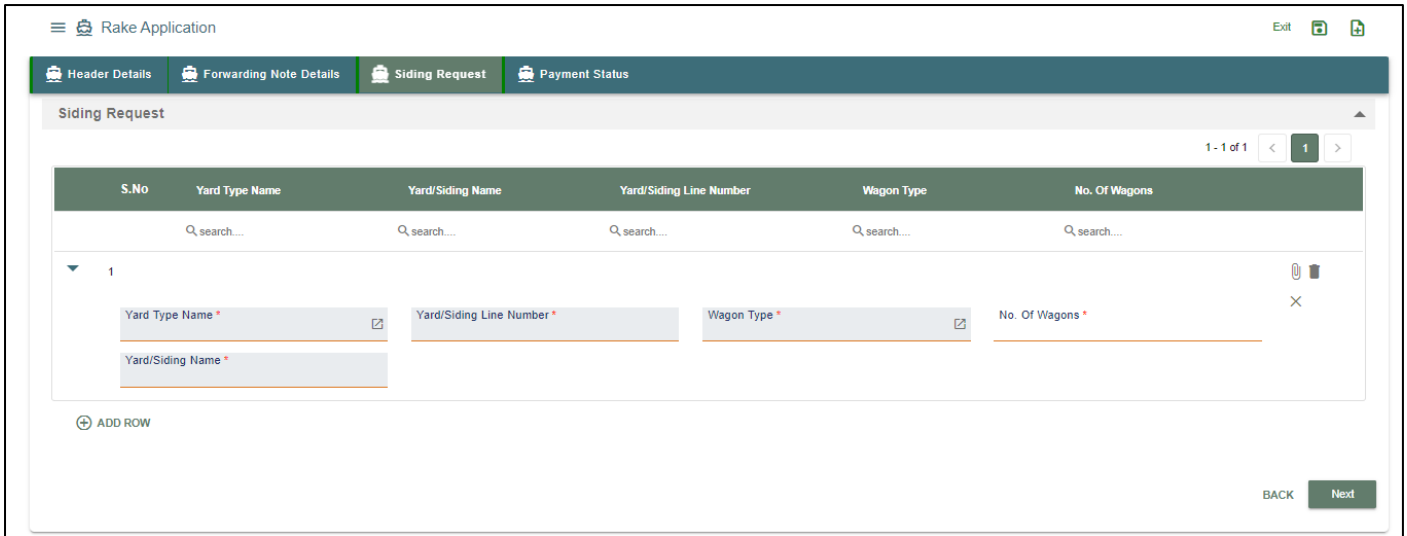
User Interface Image 30- Rake Application-1.5.3.4

Step 5 – Once all the necessary fields are filled, click **Next** button from the bottom of the page. Then sliding request - page redirected as like below
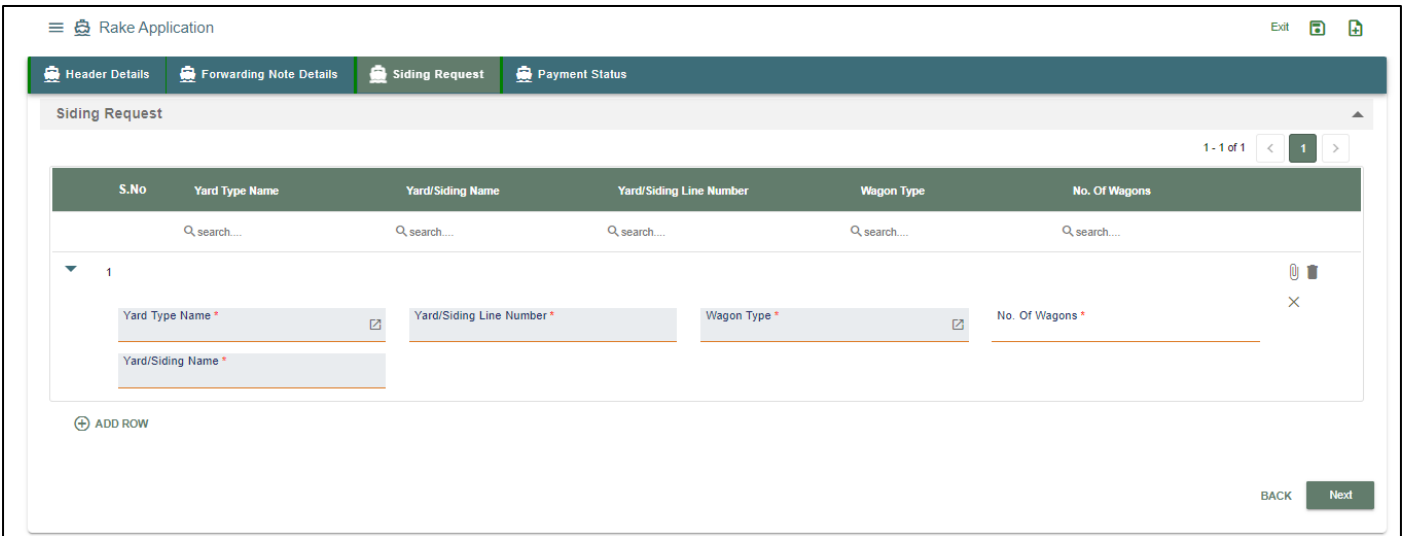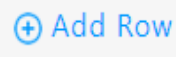

User Interface Image 31- Rake Application siding request-1.5.3.5

➢ Click on **⊕ Add Row** to begin with data entry

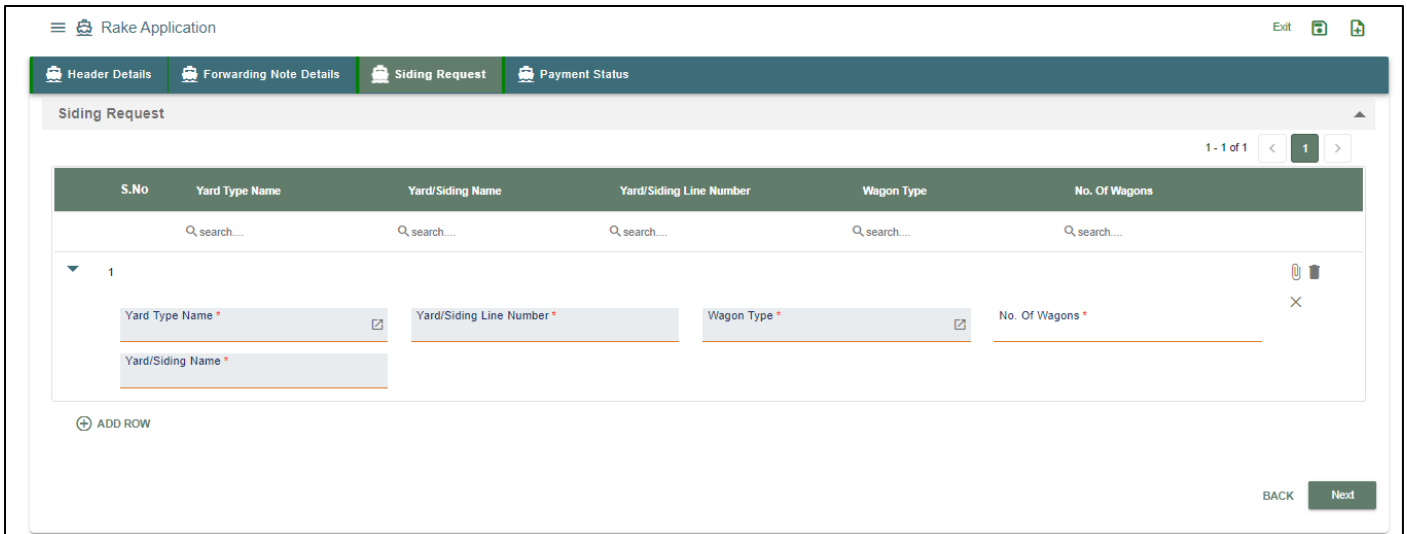*User Interface Image 32- Rake Application siding request-1.5.3.6*

➢ Select the Yard Type Name from Lookup button
➢ System will populate the fields which are Yard/Siding Name and Yard/Siding Line Number
➢ Select Wagon Type from Lookup button
➢ Enter No. of Wagons which wants to bring at particular selected siding details.

Step 6 - Once data is filled in Line item Details, click on save button [icon] to save the forwarding note

details record and click on [Add Row icon] if need to add multiple Row's or else click on [icon] button to save the complete Rake Application entered details

➢ If any want to update the previous Siding Request details line item which is already saved then click on

expansion button [icon] to update the details and click on save button [icon] . If want to delete the
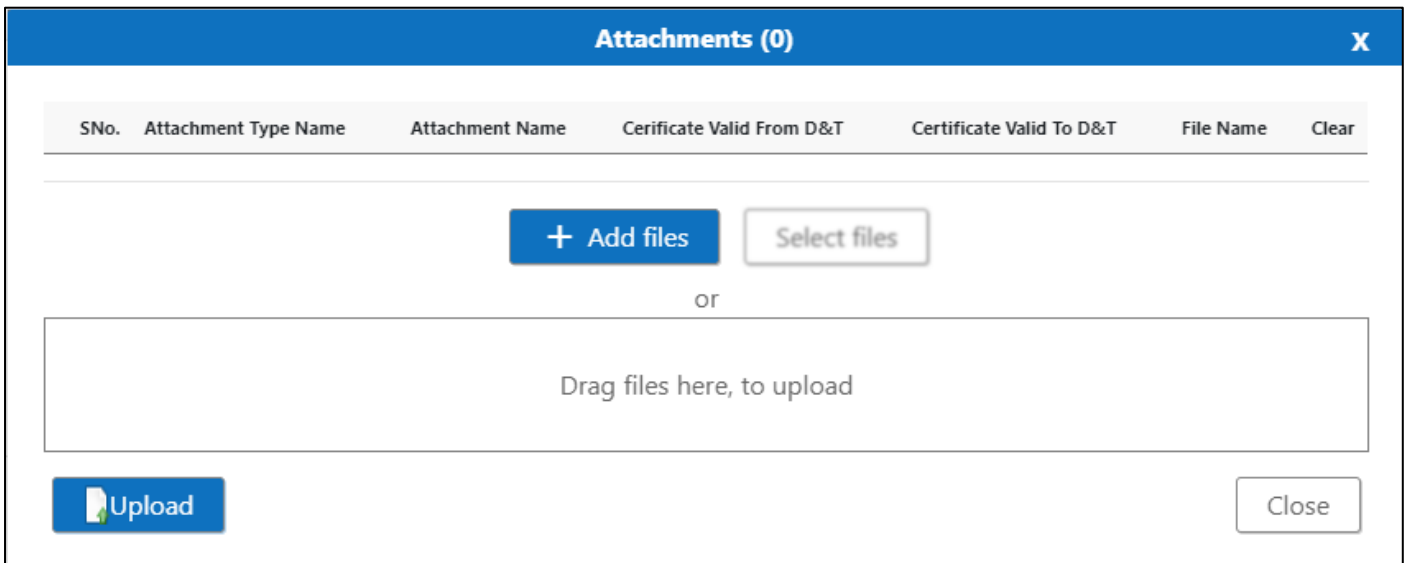
particular record line item then click on Delete button [icon]

User Interface Image 33- Rake Application siding request-1.5.3.7

Step 7: Adding the files manually once the record got saved, Click on the [paperclip] icon. Then the user will be redirected to the popup window as below –

User Interface Image 34-Rake Application (Attachments) 1.5.3.8

Step 9: Click on [+ Add files] button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

User Interface Image 35-Rake Application (Attachments Documents) 1.5.3.9

Once all the mandatory and required fields are filled then Click on **Upload** button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using 🖇 icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on icon.

Respective Form Name, Section name will display to attach the documents*File Required.

Attachments (2)

SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration						
☐ 1.	Cargo Related Documents	Azure				*File Required
Vessel Registration P & I						
☐ 1.	Vessel Related Documents	Cargo Declaration (FAL form 2)				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload   Close

Now click on the Check boxes accordingly, then Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload** button. System will' display the status **File uploaded** on the screen.

Click On Close Button

Step 10: Click on the Save button ▣ from the top right corner to save the Rake Application Form. Once

the record got saved successfully, then the system will display ✓ Record saved message.

Step 11: Once the record is saved then the document status will be as 'Draft' and then click on workflow

button ◈ .

Choose an option   X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step 12: Once the workflow is initiated click on ◈ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either
'Approve' or 'Reject' with reason (Remarks).

User WF Approval   X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[   ]

Approve   **Reject**

Successfully Status changed to WFAPP

Step 13: Once the user Approve the request the following status will be
shown on the screen and the document status will be changed as 'WFAPP'. .

If user rejects the request following alert will display on the screen. **Successfully rejected.** And the
document status will be changed as 'REJECTED'.

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Step 14: Once the workflow is in WFAPP. click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval X

     ⓘ Send user Profile for Approval

     ⓘ Change status of the record

Remarks:

Approve   **Reject**

Step15: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user rejects the

request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 16: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert ok and Back

Alert Message X

     ⓘ Do you want to cancel?

[Ok]   [Back]

By Clicking on Back we can go to the previous screen. By clicking Ok we can see the below fields in Alert.

Cancellation X

Reason Description* [　　　　　　] ⧉

Remarks [　　　　　　]

Requested By [　　　　　　]

[Exit] [Proceed]

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to CANCEL

Step 17: Upon Save / Approve /Reject /Cancel the record that can be seen in [List Data] as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 36-Rake Application (List Data) 1.5.3.10

47.5   FIELD INFORMATION

Field Name	Mandatory	Field Type
RA No.	No	Text Box
Application Type	Yes	Drop Down
Cargo Related To	Yes	Drop Down
Load Type Require	Yes	Drop Down
From Station	Yes	Look Up (LOV)
To Station	Yes	Look Up (LOV)
Via Station	No	Look Up (LOV)
Consignee Name	Yes	Look Up (LOV)
Consignor Name	Yes	Look Up (LOV)
Railway Handling Agent	Yes	Look Up (LOV)
Billing Agent	Yes	Look Up (LOV)
Inward Receipt Type	Yes	Drop Down
RR/Indemnity Bond No.	Yes	Text Box
RR/Indemnity Bond Date and Time	Yes	Calendar
Demand Type	Yes	Drop Down

E-Demand/Manual Demand No.	Yes	Text Box
E-Demand/Manual Demand Date and Time	Yes	Calendar
WRF Amount	No	Text Box
Shore Handling Charges paid	No	Drop Down
Wagon Covering Required	Yes	Drop Down
Remarks	No	Text Box
VCN	Yes	Look Up (LOV)
Vessel Name	No	Text Box
IMO Number	No	Text Box
Vessel Trade(Foreign/Coastal)	No	Text Box
ETA	No	Calendar
ETD	No	Calendar
BE No.	Yes	Look Up (LOV)
BE Quantity	No	Text Box
Out of Charge No.*	No	Text Box
Out Of Charge Quantity	No	Text Box
Nature of Cargo	Yes	Look Up (LOV)
Cargo Code	Yes	Look Up (LOV)
Cargo Description	Yes	Text Box
Booking Qty of Cargo	Yes	Text Box
UOM	No	Look Up (LOV)
Forwarding Note No.	Yes	Text Box
FNR No.	No	Text Box
Cargo/Commodity Name	Yes	Look Up (LOV)
No. of Wagons	Yes	Text Box
Quantity	Yes	Text Box
Wagon No.	Yes	Text Box
Wagon Type	Yes	Look Up (LOV)
Owning Railway	Yes	Look Up (LOV)
Yard Type	Yes	Look Up (LOV)
Yard Name	Yes	Text Box
Yard Line Number	Yes	Text Box
No. of Wagons	Yes	Text Box

48. BUSINESS FUNCTION NAME: Sick Wagon Placement

48.1 DEFINITION:

Port Officials will record the Sick Wagon Placement details in the iPortman Web Application when the Sick wagons are placed in the siding either for rectification or stabling. The Port Associates/Officials will be using this function.

48.2   NAVIGATION:

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU [≡] SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS

Menu Path	Menu Bar →Railways→ Sick Wagon Placement → Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA [🔍] AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

48.3   PREREQUISITES – MASTERS

S.No.	Maters List
1	Yard Master
2	Port Loco Master
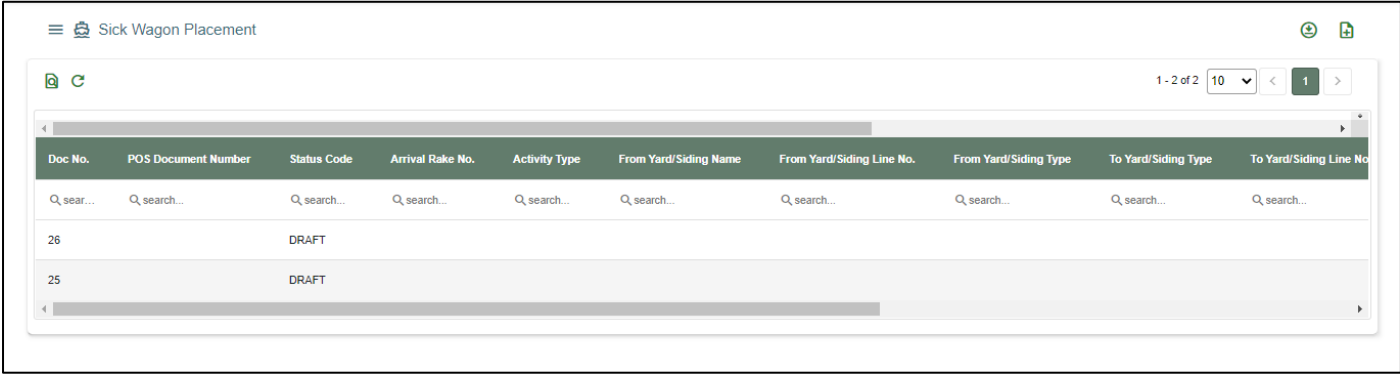
48.4   SCREENSHOT

Following screenshot from Sick Wagon Placement

List Page:

Once entered into the Functional Form – Sick Wagon Placement, list page will appear

➢ To enter into the Sick Wagon Placement New Page, click on Add New button from top of the tool bar
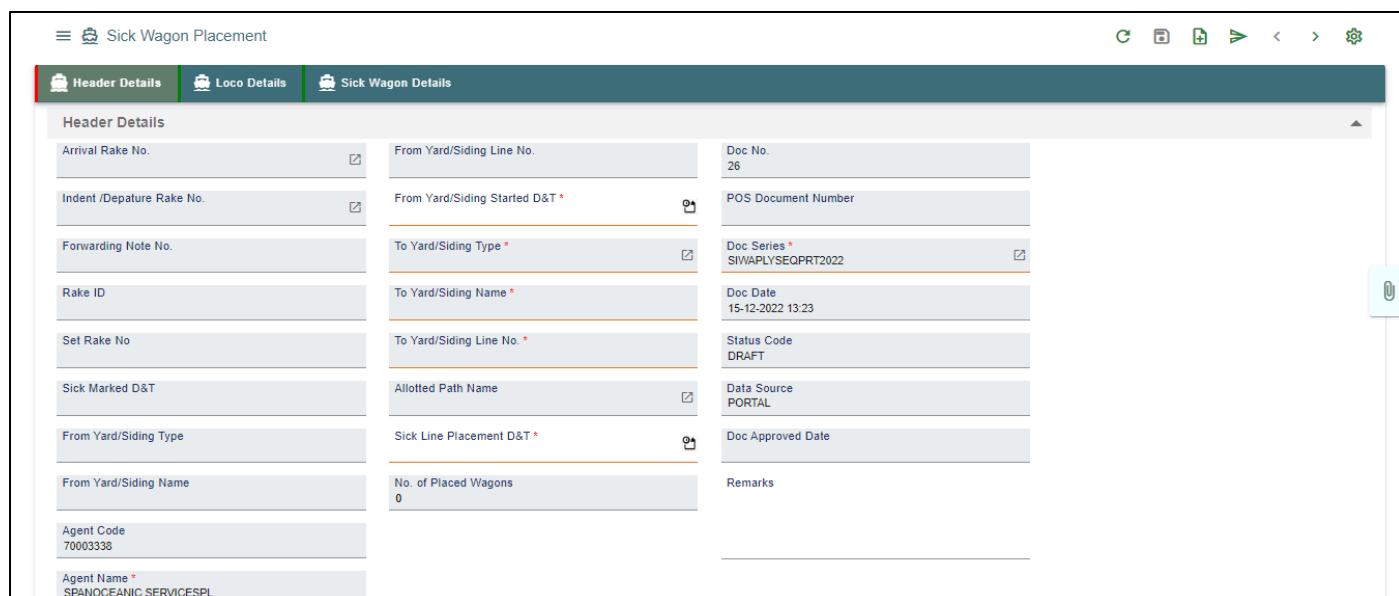
User Interface Image 193: Sick Wagon Placement – 13.5.1

Header Details:

Step 1 - Once clicked on Add New button [icon] from top of the tool bar Sick Wagon PlacementHeader Details screen will appear like below

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User Interface Image 194: Sick Wagon Placement – 13.5.2

Below are the Field Information regarding Header Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)
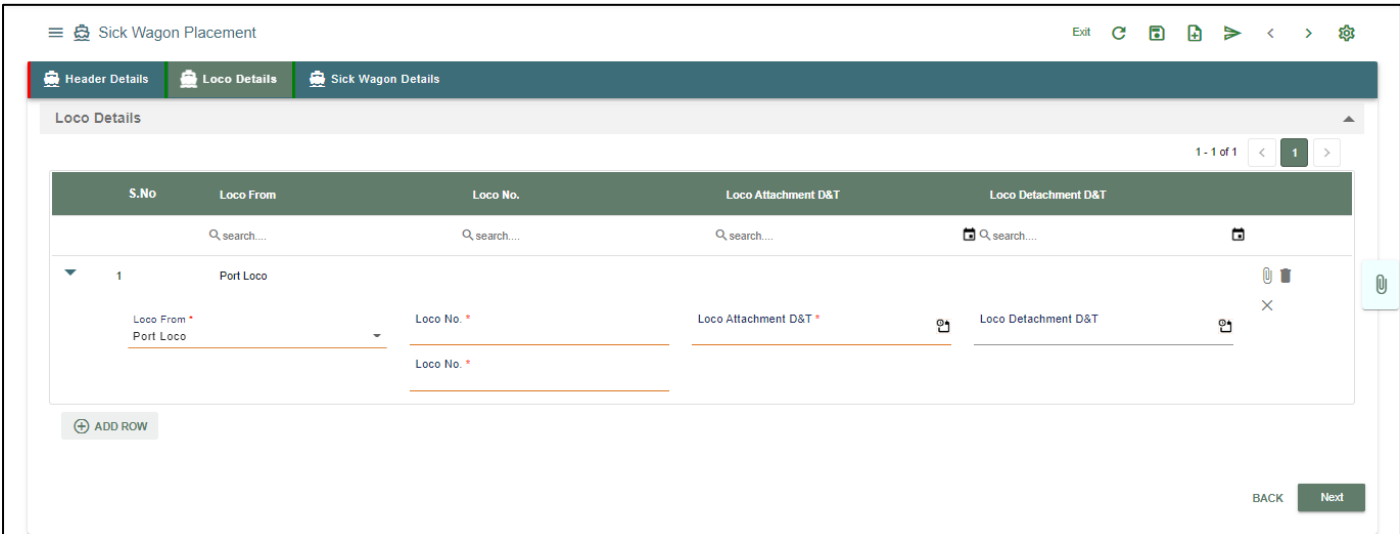
Field Name	Mandatory	Fill Type
Arrival Rake / Indent / Departure Rake No	Yes	Look Up
Forward Note Number	No	Auto Populated
Rake ID	No	Auto Populated
Set Rake Number	No	Auto Populated
Sick Marked Date and Time	No	Auto Populated
From Yard Type	No	Auto Populated
From Yard Name	No	Auto Populated
From Yard/Siding Line Number	No	Auto Populated
From Yard/Siding Started Date and Time	Yes	Date and Time
To Yard Type	Yes	Look Up
To Yard/Siding Name	Yes	Auto Populated
To Yard/Siding Line Number	Yes	Auto Populated
Allotted Path	No	Look Up
Sick Line Placement Date and Time	Yes	Date and Time Picker
No of Wagons Placed	No	Auto Populated

➤ Select Arrival Rake Number from Lookup Button
➤ Forwarding Note Number, Rake Id, Set Rake Number, Sick Marked Date and Time, From Yard Type, From Yard/Siding Name, From Yard/Siding Line Number fields are auto populated based on selection of Arrival Rake Number
➤ Enter From Yard/Siding Started Date and Time from date picker
➤ Select To Yard Type from Lookup Button

- To Yard/Siding Name, To Yard/Siding Line Number fields are auto populated based on selection of To Yard Type
- Enter Sick Line Placement Date and Time from date picker
- Number of Wagon Placed field is auto generated based on submission of Wagon Details Line item
- Enter the Remarks if any
- Doc No., Doc Series, Doc Date, Status Code, Doc Approved Date, and Source fields are auto populated by the system

Once all the necessary are filled in Haeder Section, click on next button and redirected to LOCO Details Section and click on ADDROW button
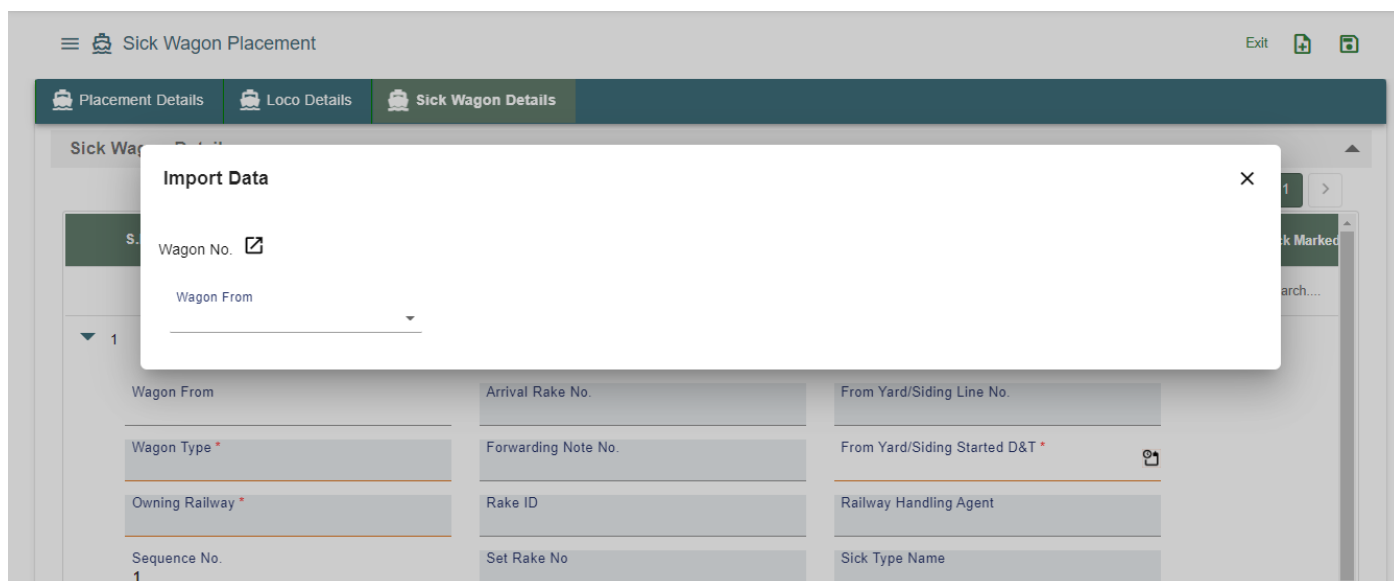
Below are the Field Information regarding Loco Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Step 2 – Onceallthe necessary are filled in Sick to Fit Certification Section, click on next button and

redirected to Sick Wagon Details Section and click   button in Sick Wagon Details Section. Then

Wagon Details Pop Up page come like below and Click on   for getting Wagon No.

➤ Select data Load

➤ Select Wagon No, then Owning Railway, Wagon Type, Cargo Status, Cargo Type, Consignee, Consignor, Handling Agent, Cargo Description, Sick Type Name, Sick Marked By, TXR Remarks fields are auto populated based on selection of Wagon Number.

➤ Then Select Rectified Status From Drop Down(Rectified/Non Rectified)

Below are the Field Information regarding Sick Wagon Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Sr.No	No	Text Box
Wagon Number	Yes	Look Up
Owning Railway	Yes	Auto Populated
Wagon Type	Yes	Auto Populated
Cargo Status	No	Auto Populated
Cargo Type	No	Auto Populated
Container Size	No	Auto Populated
Container No1	No	Auto Populated
Container No2	No	Auto Populated
Cargo Description	No	Auto Populated
Sick Type Name	No	Auto Populated
Sick Marked By	No	Auto Populated
Rectified Status	Yes	Drop Down
TXR Remarks	No	Auto Populated

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Step 3: Adding the files manually Once the record got saved, Click on the [icon]. Then the user will be redirected to the popup window as below –

User Interface Image 201-SICK WAGON PLACEMENT (Attachments) 13.5.10

Step 4 Click on [+ Add files] button/ Drag Files here, to upload , Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

.

User Interface Image 202-SICK WAGON PLACEMENT (Attachments Documents) 13.5.11

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display [File uploaded] status on the screen. Respective Form Name , Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [📎] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [📎] icon .

Respective Form Name , Section name will display to attach the documents*File Required.

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload , Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display the status [File uploaded] on the screen.

Attachments (2)

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☐	1.	Cargo Related Documents	Azure	02-03-2021 15:45:50	18-03-2021 15:45:51	Sample__1_.docx	🗑
Vessel Registration P & I							
☐	1.	Vessel Related Documents	Cargo Declaration				*File Required

+ Add files   **Select files**

or

SNo.	Attachment Type Name*	Attachment Name*	Cerificate Valid From D&T*	Certificate Valid To D&T*	Certificate Name*	Clear
1.					Sample (2).docx (9.62 kb)	⊗

Upload   **Close**

Click On Close Button

Attachments (4)

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☐	1.	General Document	AAA	02-03-2021 15:49:43	23-03-2021 15:49:44	Sample__2_.docx	🗑
☐	2.	Cargo Related Documents	Azure	02-03-2021 15:45:50	18-03-2021 15:45:51	Sample__1_.docx	🗑
☐	3.	General Document	AAA	02-03-2021 15:50:05	31-03-2021 15:50:06	__Sample__2_.doc	🗑

+ Add files   **Select files**

or

Drag files here, to upload

Upload   **Close**

Step 5: Click on the Save button from the top right corner to save the SICK WAGON PLACEMENT

Form. Once the record got saved successfully, then the system will display ✓ **Record saved**
message.

Step 6: Once the record is saved then the document status will be as 'Draft' and then click on workflow

button .

Choose an option X

Draft->WFA->Approve
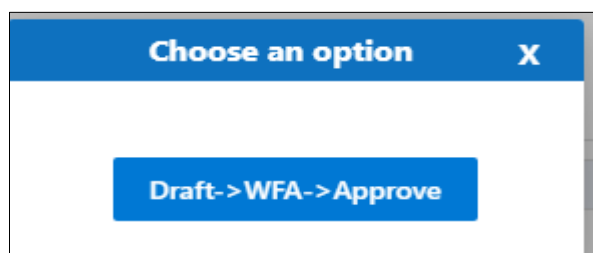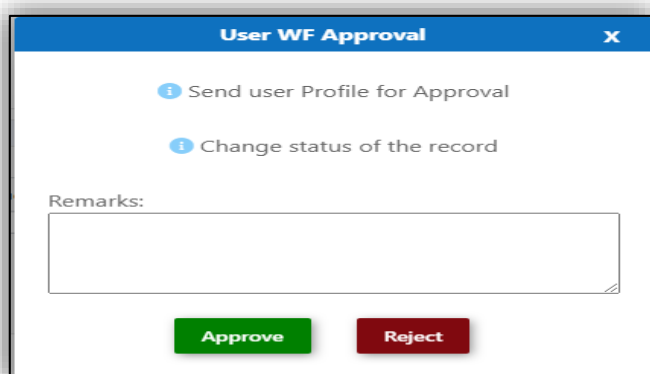
Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step7: Once the workflow is initiated click on the icon.System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either
'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[   ]

Approve   **Reject**

Successfully Status changed to WFAPP

Step8: Once the user Approve the request the following status will be
shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the

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document status will be changed as 'REJECTED'.

Step9: Once the workflow is in WFAPP. Click on ⬙ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval   X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Step10: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject

the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 11 While if there is any changes or error we can cancel the record by clicking the 🗋ₓ icon shown.

After clicking the icon system will display **Confirmation required** with below alert ok and Back

Alert Message   X

ⓘ Do you want to cancel?

[Ok]   [Back]

By Clicking on Back we can go to the previous screen. By clicking Ok we can see the below fields in Alert.

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By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to CANCEL

Step 12: Upon Save / Approve /Reject /Cancel the record that can be seen in [List Data] as Draft/Approved/Rejected/Cancel Status respectively

Doc No.	Status	To Yard/Siding Type	To Yard/Siding Name	To Yard/Siding Line No.	No. of Placed Wagons	Wagon No's.	Sick Line Placement D&T
INMAA120210028	Approved	Yard one	INDIRA DOCK	Eastern Yard - 1	2	1001,1008	25-03-2022 11:20
INMAA120210027	Approved	PORT	BHARATI DOCK YARD	Eastern Yard 4	1	10	22-03-2022 12:33
INMAA120210026	Approved	Yard one	INDIRA DOCK	Eastern Yard - 1	1	130	16-03-2022 10:37
INMAA120210025	Approved	Yard one	MOD WARE HOUSE	Eastern Yard	1	2	15-03-2022 19:00
INMAA120210024	Approved	PORT	MOD WARE HOUSE	Eastern Yard	1	130	05-01-2022 15:49
INMAA120210023	Approved	MAXIMA CRUDE TANKS	ADVANI PLOT	JD East Line Main II	1	10	16-11-2021 12:26
INMAA120210022	Approved	Yard one	GRAIN DEPOT	JD West Line	1	12	19-10-2021 17:06
INMAA120210021	Approved	Yard	RAILYARD	CONTY	1	14	14-10-2021 12:57
158	Draft	Yard	RAILYARD	CONTY	0		12-10-2021 14:50
INMAA120210020	Approved	Yard one	GRAIN DEPOT	JD West Line	1	93	17-09-2021 22:45

User Interface Image 203-SICK WAGON PLACEMENT (List Data) 13.5.12

49. BUSINESS FUNCTION NAME: WAGON PLACEMENT

49.1 DEFINITION

Port Associates/Officials are recording the information in iPortman Web & in the Mobile application when the Rakes or Partial Rakes are placing at party siding for Loading or Unloading. Port Associates/Officials will be using this function.

49.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU [≡] SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS

Menu Path	Menu Bar →Railways→ Wagon Placement → Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA [🔍] AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

49.3 PREREQUISITES – MASTERS

S.No.	Maters List
1	Handling Type
2	Yard Master
3	Railway Path Master
4	Owning Railway
5	Wagon Type
6	Agent Master
7	Cargo Master
8	Loco Master
9	Delay
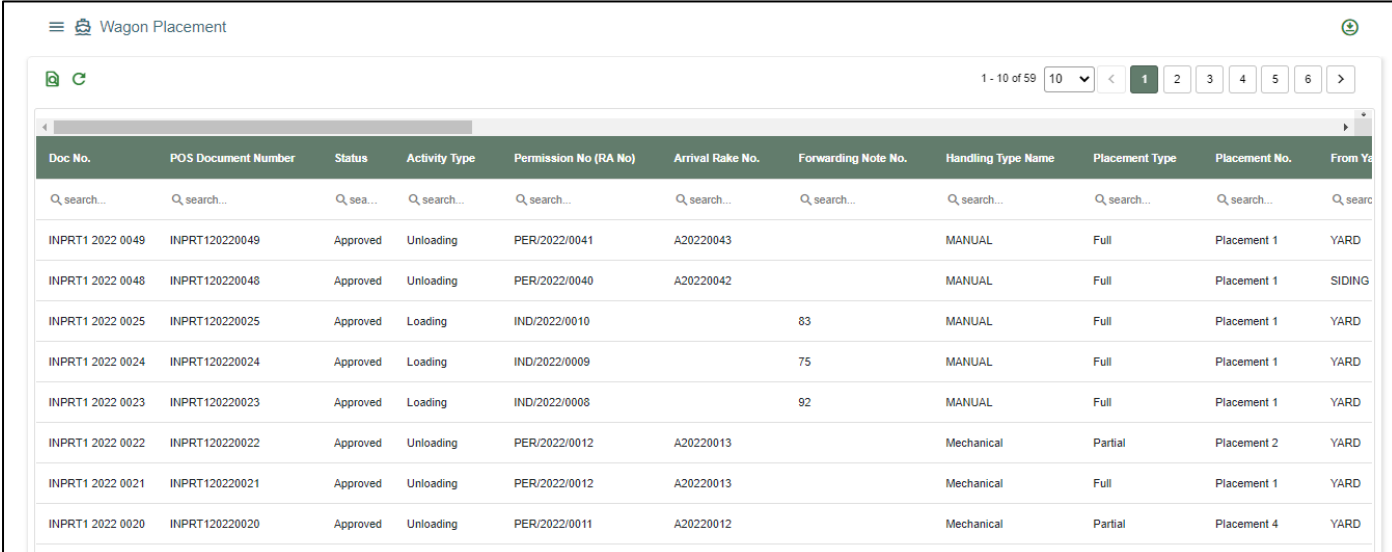
49.4 SCREENSHOT

Following screenshot from Wagon Placement

List Page:

Once entered into the Functional Form – Wagon Placement, list page will appear
To enter into the Wagon Placement New Page, click on Add New button from top of the tool bar
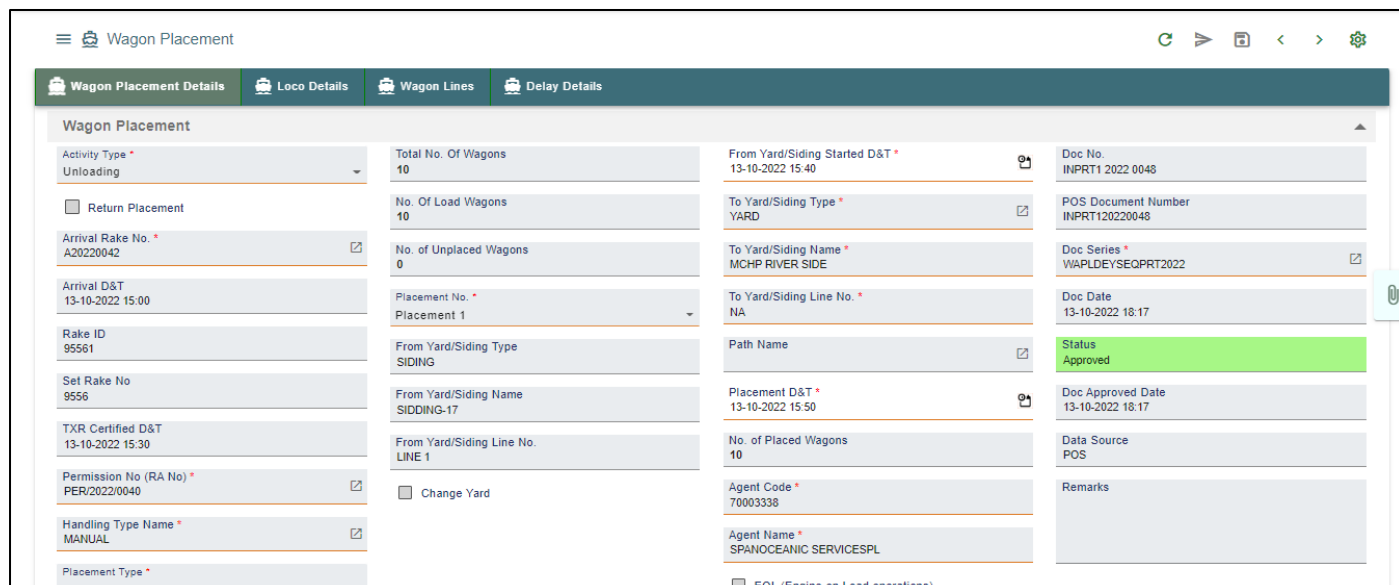
Doc No.	POS Document Number	Status	Activity Type	Permission No (RA No)	Arrival Rake No.	Forwarding Note No.	Handling Type Name	Placement Type	Placement No.	From Ya
INPRT1 2022 0049	INPRT120220049	Approved	Unloading	PER/2022/0041	A20220043		MANUAL	Full	Placement 1	YARD
INPRT1 2022 0048	INPRT120220048	Approved	Unloading	PER/2022/0040	A20220042		MANUAL	Full	Placement 1	SIDING
INPRT1 2022 0025	INPRT120220025	Approved	Loading	IND/2022/0010		83	MANUAL	Full	Placement 1	YARD
INPRT1 2022 0024	INPRT120220024	Approved	Loading	IND/2022/0009		75	MANUAL	Full	Placement 1	YARD
INPRT1 2022 0023	INPRT120220023	Approved	Loading	IND/2022/0008		92	MANUAL	Full	Placement 1	YARD
INPRT1 2022 0022	INPRT120220022	Approved	Unloading	PER/2022/0012	A20220013		Mechanical	Partial	Placement 2	YARD
INPRT1 2022 0021	INPRT120220021	Approved	Unloading	PER/2022/0012	A20220013		Mechanical	Full	Placement 1	YARD
INPRT1 2022 0020	INPRT120220020	Approved	Unloading	PER/2022/0011	A20220012		Mechanical	Partial	Placement 4	YARD

User Interface Image 90: Wagon Placement – 6.5.1

49.4.1 WAGON PLACEMENT - UNLOADING

Header Details:

Step 1 - Once clicked on Add New button ⬚ from top of the tool bar, Wagon Placement Header Details screen will appear like below

User Interface Image 91: Wagon Placement – 6.5.1.1

➢ Select Activity Type from drop down list, either it is Unloading or Loading

If Selected Activity Type is **Unloading** then following details required to enter:

➢ Select Arrival Rake Number from Lookup button
➢ Arrival Date and Time, Rake Id, Set Rake Number, TXR Certified Date and Time, Total Number of Wagons, Number of Load Wagons, Number of unplaced Wagons fields are auto populated based on selection of Arrival Rake Number
➢ Select Permission Number (RA No) from Lookup Button
➢ Select Handling Type from Lookup Button
➢ Select Placement Number from drop down list
➢ From Yard Type, From Yard/Siding Name and From Yard/Siding Line Number fields are auto populated based on selection of Arrival Rake Number
➢ Enter From Yard/Siding Started Date and Time from date picker
➢ Select To Yard Type from Lookup Button
➢ To Yard/Siding Name, To Yard/Siding Line Number fields are auto populated based on selection of To Yard Type
➢ Select Allotted Path from Lookup button. It is not mandatory field to enter
➢ Enter Placement Date and Time from date picker, then Wagon Lines Data will Load.
➢ Enter the Remarks if any
➢ Doc Number, Doc Series, Doc Date, Status Code, Doc Approved Date, and Source fields are auto populated by the system

Step 2 – Onceallthe necessary fields are filled in Wagon Placement Section, click   button from the bottom of the page of Wagon Lines Section. Then Wagon lines Pop Up page come like below and Click on

for getting Wagon No.

User Interface Image 92: Wagon Placement – 6.5.1.2

➤ After Selection of Wagon No from Pop up below field will Auto Populate.

Sequence No, Wagon No, Owning Railway, Wagon Type, Rake Cargo Status, HS Code, Cargo Type Name, Cargo Name, Seal Condition, Seal No, Consignee Name ,Consignor Name, Railway Handling Agent, Sick Status.

Step 3 – Onceallthe necessary fields are filled, click [Next] button from the bottom of the page. Then Loco Details page redirected as like below

Click on [⊕ Add Row] to begin with data entry

User Interface Image 92: Wagon Placement – 6.5.1.3

Step 4 – Once ⊕ Add Row is selected, then following Loco Details line item fields will be populated to enter.

User Interface Image 93: Wagon Placement – 6.5.1.4
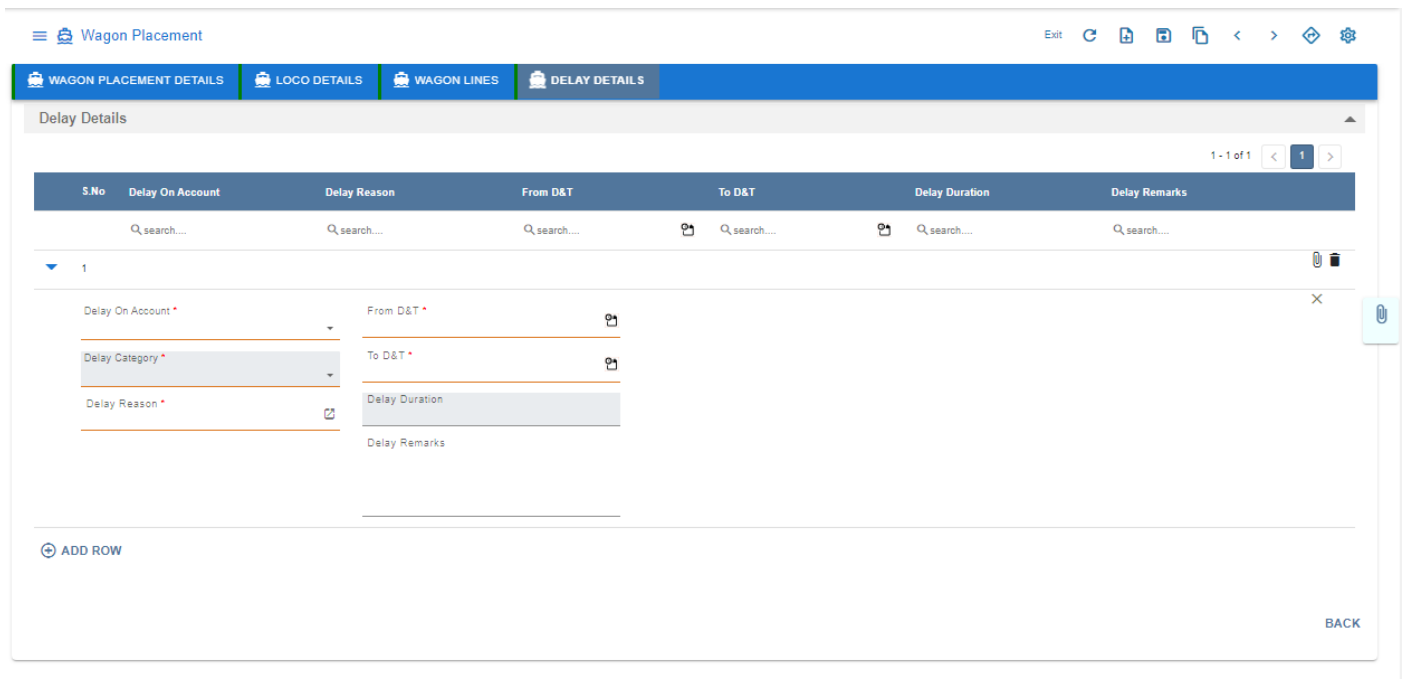
- Select Loco From by Lookup button either it is Railway Loco or Port Loco
- If selected Railway Loco then enter Loco Number.
- If selected Port Loco then select Loco Number from Lookup button

Step 5– Once all the necessary fields are filled, click **Next** button from the bottom of the page. Then delay lines page redirected as like below

Click on ⊕ Add Row to begin with data entry
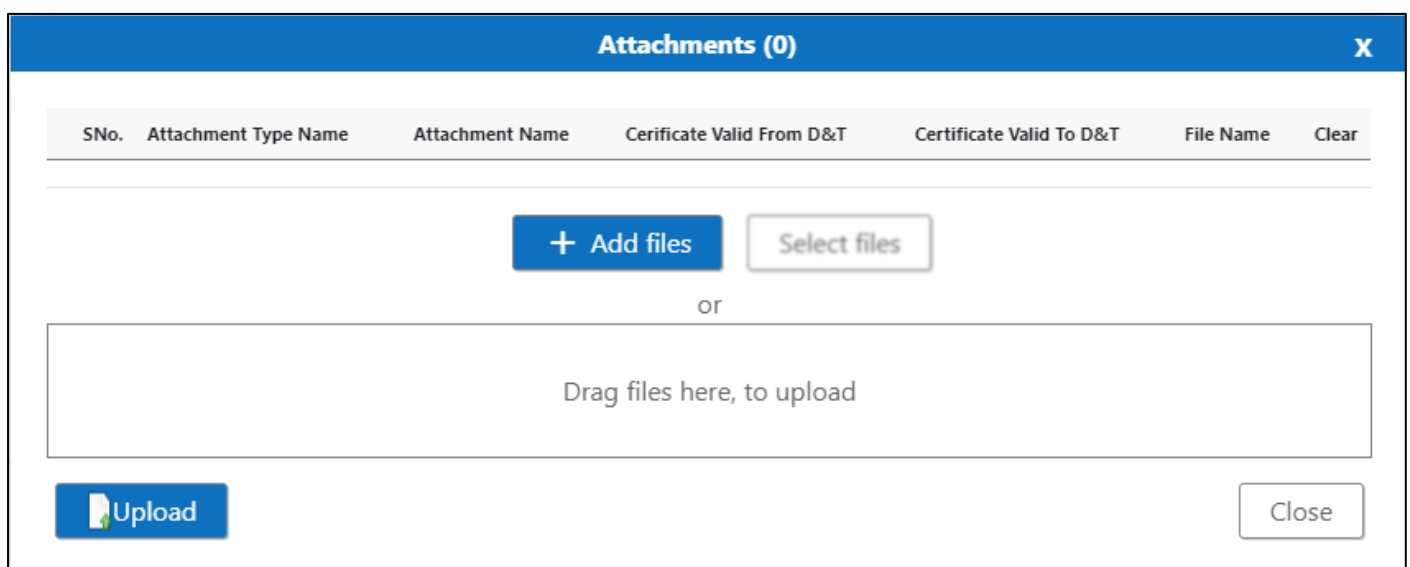
User Interface Image 95: Wagon Placement – 6.5.1.5

- ➢ Select on account drop down (port / railway/party)
- ➢ Select delay reason code fro look up
- ➢ Select from and to (date and time)

Step 6: Adding the files manually Once the record got saved, Click on the icon. Then the user will be redirected to the popup window as below –

User Interface Image 96-Wagon Placement (Attachments) 6.5.1.6

Step 7: Click on button/ Drag Files here, to upload , Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

User Interface Image 97-Wagon Placement (Attachments Documents) 6.1.5.7

Once all the mandatory and required fields are filled then Click on button. System will display status on the screen. Respective Form Name , Section name will display along with attached documents.

NOTE: If the attachments added in line level by using icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on icon .

Respective Form Name , Section name will display to attach the documents*File Required.

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload , Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Attachments (2)   **X**

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☑	1.	Cargo Related Documents	Azure				*File Required
Vessel Registration P & I							
☑	1.	Vessel Related Documents	Cargo Declaration (FAL form 2)				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload   Close

Once all the mandatory and required fields are filled then Click on **Upload** button. System will display the status **File uploaded** on the screen.

Click On Close Button

Step 8: Click on the Save button 💾 from the top right corner to save the Wagon Placement Form.

Once the record got saved successfully, then the system will display ✅ Record saved message.

Step 9: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ↪ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step 10: Once the workflow is initiated click on ↩ the icon.System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ℹ Send user Profile for Approval

ℹ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP

Step 11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

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Step 11: Once the workflow is in WFAPP. click on [icon] the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step 11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the [icon] icon shown.

After clicking the icon system will display **Confirmation required** with below alert ok and Back

By Clicking on Back we can go to the previous screen. By clicking Ok we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to CANCEL

Step 13: Upon Save / Approve /Reject /Cancel the record that can be seen in [List Data] as Draft/Approved/Rejected/Cancel Status respectively

Doc No.	Status	Activity Type	Permission No (RA No)	Arrival Rake No.	Forwarding Note No.	Handling Type Name	Placement Type
INMAA120220014	Approved	Unloading	PER/2022/0005	A20220007		Vessel Gantryr	Partial
INMAA120220011	Approved	Loading	IND/2022/0005		45	Port Gantry	Full
5621	Draft	Loading	IND/2022/0004		3	Vessel Gantryr	Partial
INMAA120220010	Approved	Unloading	PER/2022/0005	A20220007		Vessel Gantryr	Partial
INMAA120220009	Cancelled	Unloading	PER/2022/0005	A20220007		Vessel Gantryr	Partial
INMAA120220008	Approved	Unloading	PER/2022/0004	A20220006		Tippler	Full
INMAA120220007	Approved	Loading	IND/2022/0002		12	Vessel Gantryr	Partial
INMAA120220012	Approved	Loading	IND/2021/0160		4325	Vessel Gear	Partial
INMAA120220006	Approved	Loading	IND/2022/0001		56	Vessel Gantryr	Partial
INMAA120220005	Approved	Loading	IND/2022/0001		56	Vessel Gantryr	Partial
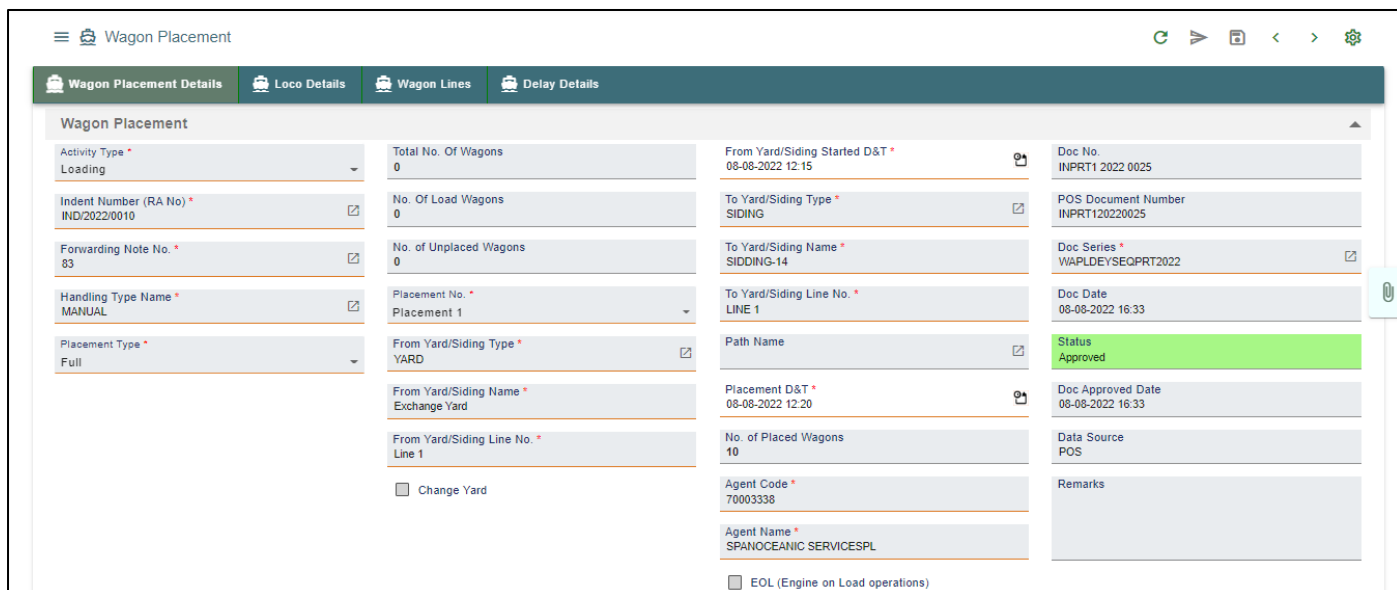
User Interface Image 98-Wagon Placement (List Data) 6.5.1.8

49.4.2 WAGON PLACEMENT - LOADING

Header Details:

Step 1 - Once clicked on Add New button [icon] from top of the tool bar, Wagon Placement Header Details screen will appear like below

Copy Right @ Envision Enterprise Solutions Pvt. Ltd.

User Interface Image 99: Wagon Placement – 6.5.2.1
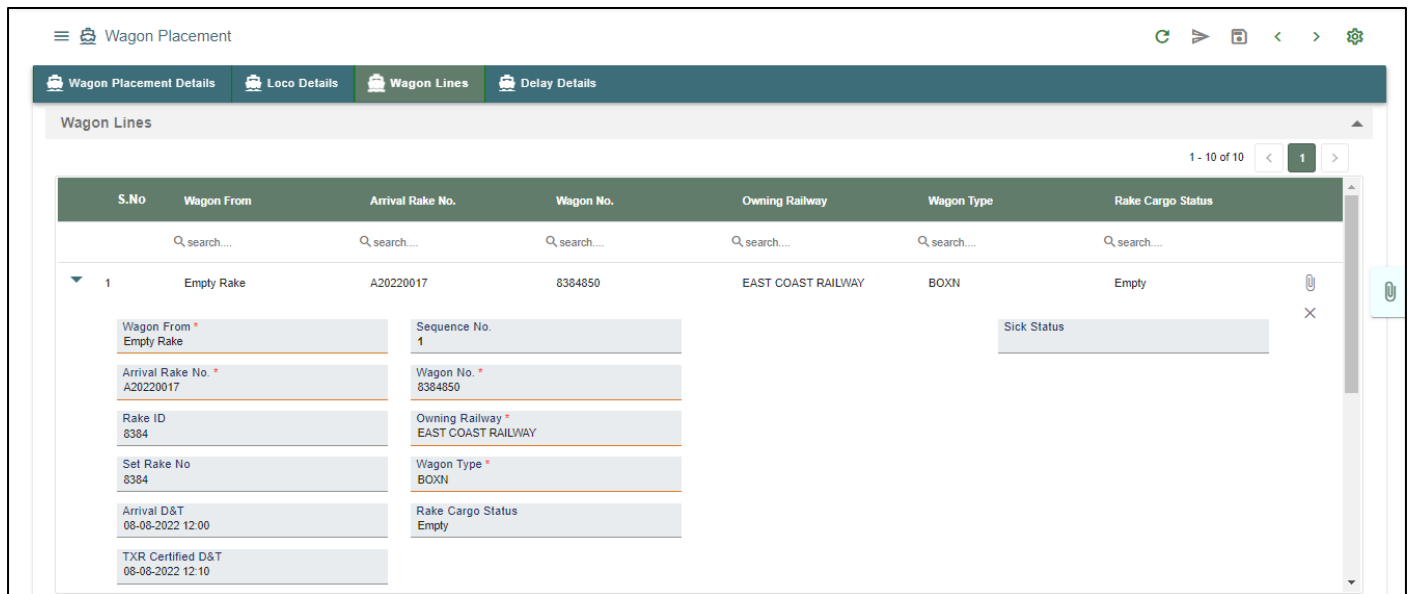
➢ Select Activity Type from drop down list, either it is Unloading or Loading

If Selected Activity Type is **Loading** then following details required to enter:

➢ Select Indent Number (RA No) from Lookup button
➢ Select Forwarding Note Number from Lookup button
➢ Select Handling Type from Lookup Button
➢ Select Placement Number from drop down list
➢ From Yard Type, From Yard/Siding Name and From Yard/Siding Line Number fields are auto populated based on selection of Indent Number (RA No)
➢ Enter From Yard/Siding Started Date and Time from date picker
➢ Select To Yard Type from Lookup Button
➢ To Yard/Siding Name, To Yard/Siding Line Number fields are auto populated based on selection of To Yard Type
➢ Select Allotted Path from Lookup button. It is not mandatory field to enter
➢ Enter Placement Date and Time from date picker for Getting Wagon No in Wagon Line Section
➢ Enter the Remarks if any
➢ Draft Number, Doc Series, Doc Date, Status Code, Doc Approved Date, and Source fields are auto populated by the system

➢ **Step 2 –** Onceallthe necessary fields are filled in Wagon Placement Section, click button from the bottom of the page of Wagon Lines Section. Then Wagon lines Pop Up page come like below and

Click on for getting Wagon No.

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User Interface Image 92: Wagon Placement – 6.5.2.2

➢ After Selection of Wagon No from Pop up below field will Auto Populate.

Sequence No, Wagon No, Owning Railway, Wagon Type, Rake Cargo Status, HS Code, Cargo Type Name, Cargo Name, Seal Condition, Seal No, Consignee Name ,Consignor Name, Railway Handling Agent, Sick Status.

Step 3 – Onceallthe necessary fields are filled, click **Next** button from the bottom of the page. Then Loco Details page redirected as like below

Click on ⊕ Add Row to begin with data entry

User Interface Image 100: Wagon Placement – 6.5.2.3

Step 4 – Once ⊕ Add Row is selected, then following Loco Details line item fields will be populated to enter

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User Interface Image 101: Wagon Placement – 6.5.2.4

➢ Select Loco From by Lookup button either it is Railway Loco or Port Loco
➢ If selected Railway Loco then enter Loco Number.
➢ If selected Port Loco then select Loco Number from Lookup button

Step 5– Onceallthe necessary fields are filled, click **Next** button from the bottom of the page. Then delay lines page redirected as like below

Click on ⊕ Add Row to begin with data entry

User Interface Image 103: Wagon Placement – 6.5.2.5

➢ Select on account drop down (port / railway/party)
➢ Select delay reason code fro look up
➢ Select from and to (date and time)

Step 6: Adding the files manually Once the record got saved, Click on the 🔗icon. Then the user will be redirected to the popup window as below –

457

User Interface Image 104-Wagon Placement (Attachments) 6.5.2.6

Step 7: Click on ![+ Add files] button/ Drag Files here, to upload , Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

User Interface Image 105-Wagon Placement (Attachments Documents) 6.1.2.7

Once all the mandatory and required fields are filled then Click on ![Upload] button. System will display ![File uploaded] status on the screen. Respective Form Name , Section name will display along with attached documents.

NOTE: If the attachments added in line level by using ![@] icon system will display respective section name.

		Attachments (1)				X
	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear

Dredging Request

| ☐ | 1. | Individual Pass Documents | General | 02-03-2021 15:17:24 | 29-03-2021 15:17:26 | 📄 Sample.docx | 🗑 |

+ Add files   Select files

or

Drag files here, to upload

Upload   Close

If the Attachment's are configured, System will display like below when we click on 📎 icon .

Respective Form Name , Section name will display to attach the documents*File Required.

		Attachments (2)					X
	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear

Vessel Registration

| ☐ | 1. | Cargo Related Documents | Azure | | | | *File Required |

Vessel Registration P & I

| ☐ | 1. | Vessel Related Documents | Cargo Declaration (FAL form 2) | | | | *File Required |

+ Add files   Select files

or

Drag files here, to upload

Upload   Close

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload , Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Attachments (2)   X

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☑	1.	Cargo Related Documents	Azure				*File Required
Vessel Registration P & I							
☑	1.	Vessel Related Documents	Cargo Declaration (FAL form 2)				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload   Close

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display the status [File uploaded] on the screen.

Click On Close Button

Step 8: Click on the Save button [icon] from the top right corner to save the Wagon Placement Form.

Once the record got saved successfully, then the system will display [Record saved] message.

Step 9: Once the record is saved then the document status will be as 'Draft' and then click on workflow button [icon] .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step 10: Once the workflow is initiated click on [icon] the icon.System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval x

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[ ]

Approve   **Reject**

Successfully Status changed to WFAPP

Step 11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

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Step 11: Once the workflow is in WFAPP. click on [icon] the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Step 11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the [icon] icon shown.

After clicking the icon system will display **Confirmation required** with below alert ok and Back

Alert Message X

ⓘ Do you want to cancel?

Ok   Back

By Clicking on Back we can go to the previous screen. By clicking Ok we can see the below fields in Alert.

Cancellation X

Reason Description*   [   ] ↗

Remarks   [   ]

Requested By   [   ]

Exit Proceed

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display Ok and status will change to CANCEL

Step 13: Upon Save / Approve /Reject /Cancel the record that can be seen in List Data as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 106-Wagon Placement (List Data) 6.5.2.8

49.5 FIELD INFORMATION

For unloading:-

Field Name	Mandatory	Fill Type
Activity Type	Yes	Check Box
Arrival Rake Number	Yes	Look Up
Arrival Date and Time	No	Auto Populated
Rake ID	No	Auto Populated
Set Rake Number	No	Auto Populated
TXR Certified Date and Time *	No	Auto Populated
Total Number of Wagons	No	Auto Populated
Number of Load Wagons	No	Auto Populated
No of Un Placed Wagons	No	Auto Populated
Permission Number (RA)	Yes	Look Up
Handling Type	Yes	Look Up
Placement Type	Yes	Drop Down List
Placement Number	Yes	Drop Down List
From Yard Type	No	Auto Populated
From Yard/ Siding Name	No	Auto Populated

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From Yard/Siding Line Number	No	Auto Populated
From Yard/Siding Started Date and Time	Yes	Date and Time
To Yard Type	Yes	Auto Populated Look up
To Yard/Siding Name	Yes	Auto Populated
To Yard/Siding Line Number	Yes	Auto Populated
Path Name	No	Look Up
Placement Date and Time	Yes	Date and Time
Tippler Name	No	Lookup
No of Placed Wagons	No	Text Box
Loco From	Yes	Dropdown
Loco Number*	Yes	Manual Entry
Loco Attachment Date and Time	Yes	Date and Time
Loco Detachment Date and Time	Yes	Date and Time
Sr.No	No	Text Box
Seq No	No	Auto Populated
Wagon Number	Yes	Look Up
Owning Railway	Yes	Auto Populated
Wagon Type	Yes	Auto Populated
Cargo Status	No	Auto Populated
HS Code	No	Auto Populate
Cargo Type	No	Auto Populated
Cargo Description	No	Auto Populated
No of Packages	No	Text Box
Container Size	No	Auto Populated
Container No1	No	Auto Populated
Container No2	No	Auto Populated
Seal Condition	No	Auto Populated
Seal Number	No	Manual entry
Consignee	No	Auto Populated
Consignor	No	Auto Populated
Handling Agent	No	Auto Populated
Railway Billing Agent	No	Auto Populated
Sick Status	No	Auto Populated
Delay on Account	Yes	Dropdown
Delay Reason	Yes	Lookup
From Date and Time	Yes	Date and Time Picker
To Date and time	Yes	Date and Time Picker
Duration	No	Autopopulated
Delay Remarks	No	Text Box

For Loading:-

Field Name	Mandatory	Fill Type
Activity Type	Yes	Check Box
Indent Number(RA No)	Yes	Look Up
Forwarding Note Number*	**Yes**	**Drop Down List**
Placement Type	Yes	Drop Down List
Placement Number	Yes	Drop Down List
From Yard Type	Yes	Look Up
From Yard/ Siding Name	Yes	Auto Populated
From Yard/Siding Line Number	Yes	Auto Populated
From Yard/Siding Started Date and Time	Yes	Date and Time
To Yard Type	Yes	Auto Populated Look up
To Yard/Siding Name	Yes	Auto Populated
To Yard/Siding Line Number	Yes	Auto Populated
Placement Date and Time	Yes	Date and Time
Handling Type	Yes	Look Up
Path Name	No	Look Up
No of Placed Wagons	No	Text Box
Loco From	Yes	Dropdown
Loco Number*	Yes	Manual Entry
Loco Attachment Date and Time	Yes	Date and Time
Loco Detachment Date and Time	Yes	Date and Time
Sr.No	No	Text Box
Wagon From	Yes	Drop Down List
Arrival Rake Number / Wagon Number	Yes	Look Up
Rake ID	No	Auto Populated
Set Rake Number	No	Auto Populated
Arrival Date and Time	No	Auto Populated
Seq No	No	Auto Populated
TXR Certified Date and Time *	No	Auto Populated
Wagon Number	Yes	Look Up
Owning Railway	Yes	Auto Populated
Wagon Type	Yes	Auto Populated
Consignee	No	Auto Populated
Consignor	No	Auto Populated
Handling Agent	No	Auto Populated
Sick Status	No	Auto Populated
Delay on Account	Yes	Dropdown
Delay Reason	Yes	Lookup
From Date and Time	Yes	Date and Time Picker
To Date and time	Yes	Date and Time Picker

Duration	No	Autopopulated
Delay Remarks	No	Text Box

50. BUSINESS FUNCTION NAME: DECLARATION OF LOADING AND UNLOADING

50.1 DEFINITION:

Declaration of Loading and Unloading will be submitted by the Agent through the portal. After completion of loading or unloading operation agents will declare the operation completion, the same can be entered through Web application by the port officials.

The Registered Consignee/Consignor/Railway handling agent (RHA) will be using this function. In case the user is unable to submit the details via the portal, the user declares the operations at the port designated counter.

50.2 NAVIGATION:

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ☰ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS

Menu Path	Menu Bar →Railways→ Declaration of Loading and Unloading → Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

50.3 PREREQUISITES – MASTERS

S.No.	Maters List
1	Activity Type
2	Handling Type
3	Port Loco Master
4	Party Master
5	Rejected Type
6	Loading Completed
7	Loading Completed
8	Delay
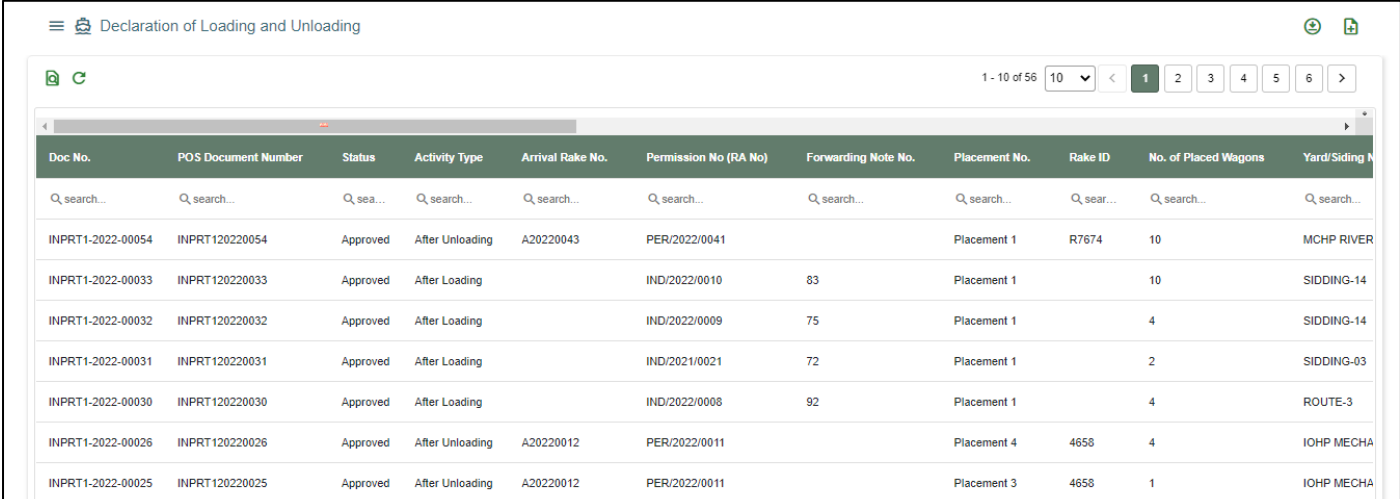
50.4 SCREENSHOT

Following screenshot from Declaration of Loading and Unloading

List Page:

Once entered into the Functional Form – Declaration of Loading and Unloading, list page will appear
To enter into the Declaration of Loading and Unloading New Page, click on Add New button from top of the tool bar

User Interface Image 107: Declaration of Loading and Unloading – 7.5.1

50.4.1 Declaration of Loading and Unloading –(Unloading)

Header Details:

Step 1 - Once clicked on Add New button from top of the tool bar, Declaration of Loading and Unloading Header Details screen will appear like below

User Interface Image 108: Declaration of Loading and Unloading – 7.5.1.1
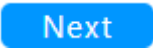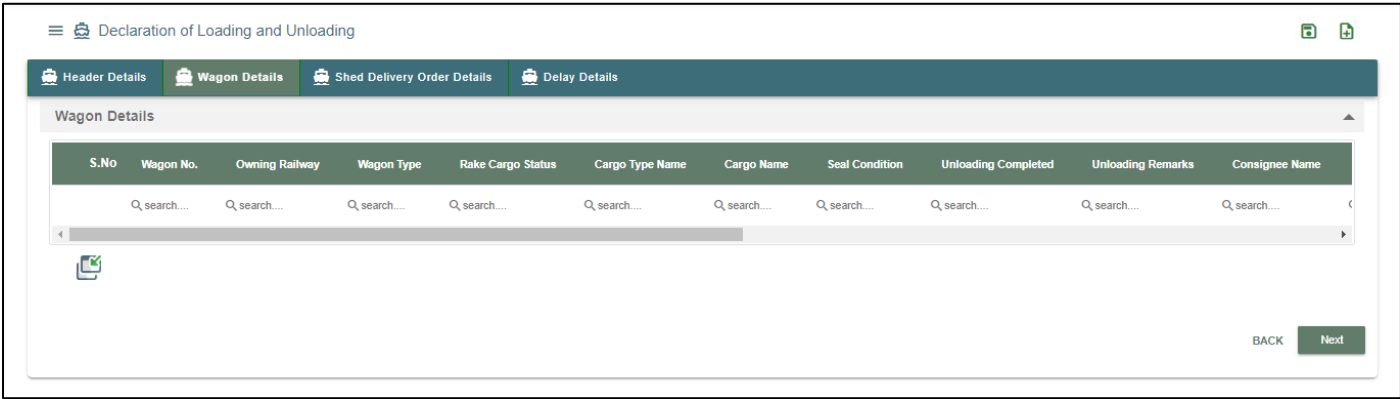
➢ Select Activity Type from drop down list, either it is Unloading or Loading

If Selected Activity Type is after **Unloading** then following details required to enter:

➢ Select Arrival Rake Number from Lookup button
➢ Permission Number (RA No), Placement Number, Rake Id, Set Rake Number, Placement Date and Time, Number of Wagons Placed, Yard Type, Yard/Siding Name, Yard/Siding Line Number fields are auto populated based on selection of Arrival Rake Number
➢ Enter Operation Commencement Date and Time from date picker
➢ Enter Completion Date and Time from date picker
➢ Select Handling Type from Lookup button
➢ Enter Declaration Date and Time from date picker
➢ Enter the Remarks if any
➢ Doc No., Doc Series, Doc Date, Status Code, Doc Approved Date, and Source fields are auto populated by the system
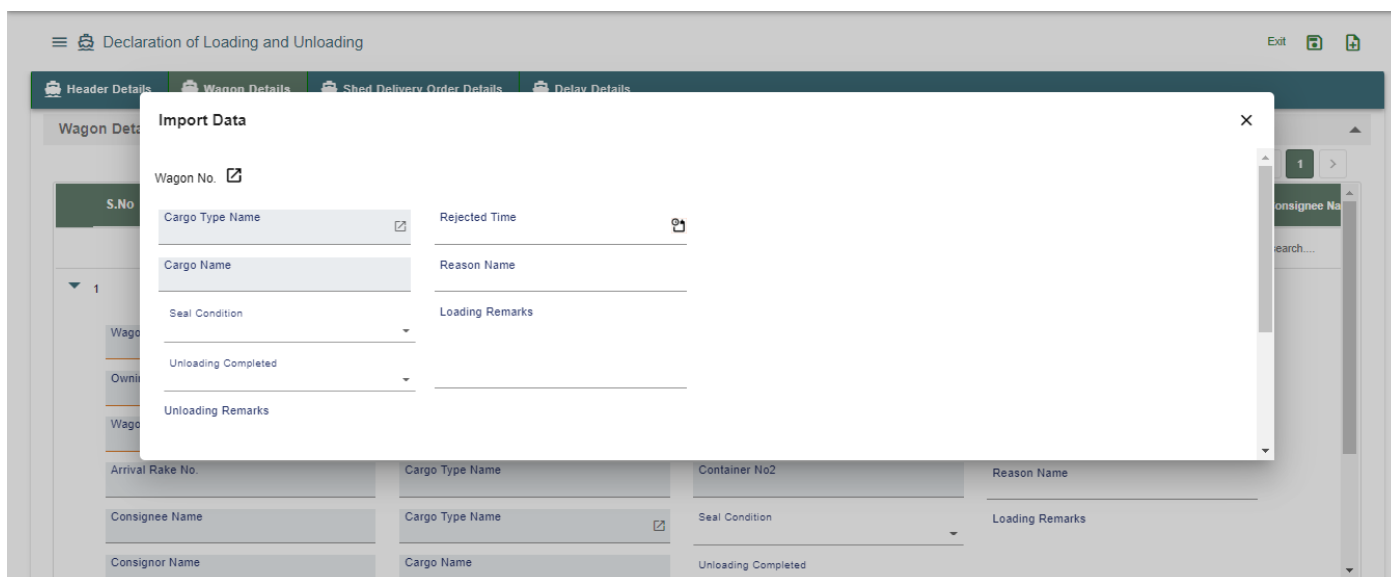
Step 2 – Onceallthe necessary fields are filled, click **Next** button from the bottom of the page. Then Wagon Details page redirected as like below

Click on ⊕ Add Row to begin with data entry
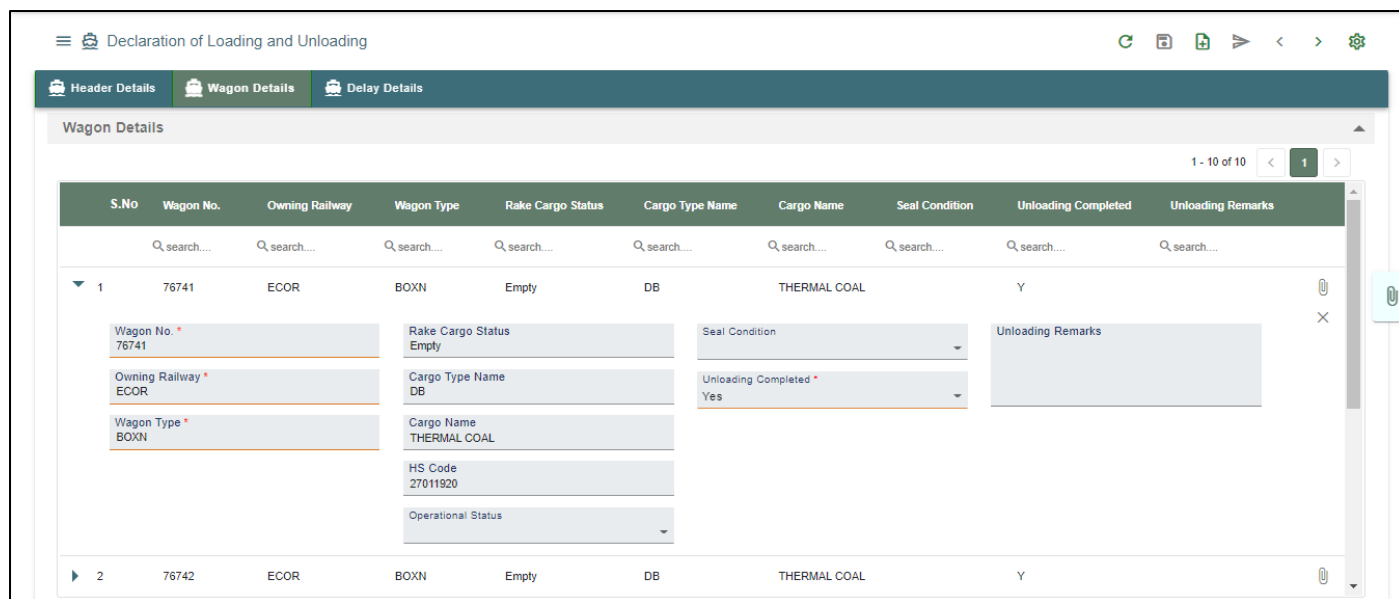
User Interface Image 109: Declaration of Loading and Unloading – 7.5.1.2

Step 3 – Once ⊕ Add Row is selected, then following Wagon Details line item fields will be populated to enter
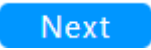
User Interface Image 110: Declaration of Loading and Unloading – 7.5.1.3
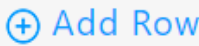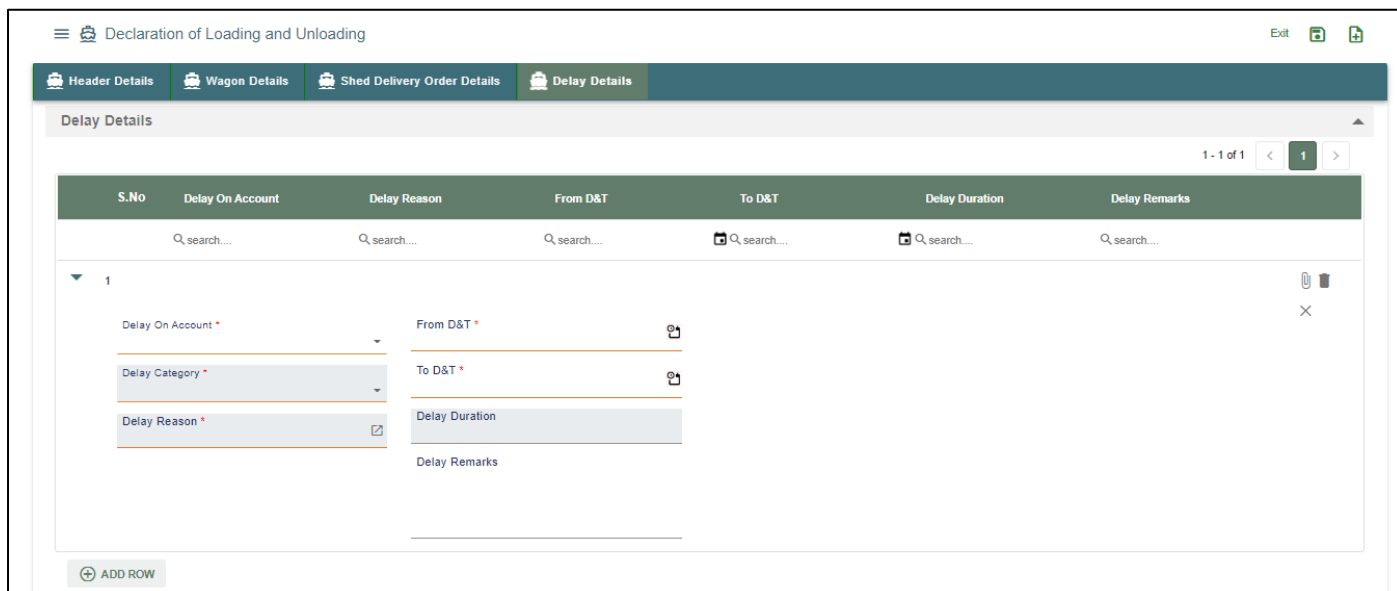
User Interface Image 111: Declaration of Loading and Unloading – 7.5.1.4

➢ Select Wagon Number from Lookup button
➢ Owning Railway, Wagon Type, Cargo Status, Cargo Type, Cargo Description fields are auto populated based on selection of Wagon Number
➢ Select Seal Condition from drop down button either it is Yes or No
➢ Select Unloading Completed from drop down button either it is Yes or No
➢ Enter Tippling Start Date and Time. It is not mandatory field to enter
➢ Enter Tippling End Date and Time. It is not mandatory field to enter
➢ Enter Unloading Remarks if any

Step 4– Onceallthe necessary fields are filled, click [Next] button from the bottom of the page. Then delay lines page redirected as like below

Click on ⊕ Add Row to begin with data entry

User Interface Image 112: Declaration of Loading and Unloading – 7.5.1.5

➢ Select on account drop down (port / railway/party)
➢ Select delay reason code fro look up
➢ Select from and to (date and time)

Step 5: Adding the files manually Once the record got saved, Click on the 📎 icon. Then the user will be redirected to the popup window as below –

User Interface Image 113-Declaration of loading & Unloading (Attachments) 7.5.1.6

Step 6: Click on [+ Add files] button/ Drag Files here, to upload , Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

User Interface Image 114-Declaration of loading & Unloading (Attachments Documents) 7.1.5.7

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display [File uploaded] status on the screen. Respective Form Name , Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [📎] icon system will display respective section name.

Attachments (1)   X

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Dredging Request							
☐	1.	Individual Pass Documents	General	02-03-2021 15:17:24	29-03-2021 15:17:26	📄 Sample.docx	🗑

+ Add files   **Select files**

or

Drag files here, to upload

Upload   **Close**

If the Attachment's are configured, System will display like below when we click on 📎 icon .

Respective Form Name , Section name will display to attach the documents*File Required.

Attachments (2)   X

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☐	1.	Cargo Related Documents	Azure				*File Required
Vessel Registration P & I							
☐	1.	Vessel Related Documents	Cargo Declaration (FAL form 2)				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload   **Close**

Now Click on the Check boxes accordingly, then ⌷ Select files ⌷ button will be enable.

Select respective files / Drag Files here, to upload , Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on ⌷Upload⌷ button. System will display the status ⌷ File uploaded ⌷ on the screen.

Attachments (2)   X

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☐	1.	Cargo Related Documents	Azure	02-03-2021 15:45:50	18-03-2021 15:45:51	�📄 Sample__1_.docx	🗑
Vessel Registration P & I							
☐	1.	Vessel Related Documents	Cargo Declaration				*File Required

+ Add files   **Select files**

or

SNo.	Attachment Type Name*	Attachment Name*	Cerificate Valid From D&T*	Certificate Valid To D&T*	Certificate Name*	Clear
1.	▭ ≡	▭	▭ 📅	▭ 📅	Sample (2).docx (9.62 kb)	⊗

📤Upload   **Close**

Click On Close Button

Attachments (4)   X

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☐	1.	General Document	AAA	02-03-2021 15:49:43	23-03-2021 15:49:44	�📄 Sample__2_.docx	🗑
☐	2.	Cargo Related Documents	Azure	02-03-2021 15:45:50	18-03-2021 15:45:51	�📄 Sample__1_.docx	🗑
☐	3.	General Document	AAA	02-03-2021 15:50:05	31-03-2021 15:50:06	�📄 __Sample__2_.doc	🗑

+ Add files   **Select files**

or

Drag files here, to upload

📤Upload   **Close**

Step 7: Click on the Save button from the top right corner to save the Declaration of loading & Unloading Form. Once the record got saved successfully, then the system will display

Record saved message.

Step 8: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step 9: Once the workflow is initiated click on the icon.System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step 10: Once the user Approve the request the following

Successfully Status changed to WFAPP

status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. Successfully rejected. And the

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document status will be changed as 'REJECTED'.

Step 11: Once the workflow is in WFAPP. click on [icon] the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step 12: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject

the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 13: While if there is any changes or error we can cancel the record by clicking the [icon] icon shown.

After clicking the icon system will display **Confirmation required** with below alert ok and Back

By Clicking on Back we can go to the previous screen. By clicking Ok we can see the below fields in Alert.

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By Clicking on Exit we can go to the previous screen. By clicking Proceedsystem will display Ok and status will change to CANCEL

Step 14: Upon Save / Approve /Reject /Cancel the record that can be seen in List Data as Draft/Approved/Rejected/Cancel Status respectively

Doc No.	Status	Activity Type	Arrival Rake No.	Permission No (RA No)	Forwarding Note No.	Placement No.	Rake ID
INMAA120220007	Waiting for Cancel	After Loading		IND/2022/0005	45	Placement 1	
INMAA120220006	Approved	After Unloading	A20220007	PER/2022/0005		Placement 1	354
INMAA120220005	Cancelled	After Unloading	A20220007	PER/2022/0005		Placement 1	354
INMAA120220004	Approved	After Unloading	A20220006	PER/2022/0004		Placement 1	54544
INMAA120220003	Approved	After Loading		IND/2022/0002	12	Placement 1	
INMAA120220002	Approved	After Loading		IND/2022/0001	56	Placement 1	
INMAA120220001	Approved	After Unloading	A20220001	PER/2022/0001		Placement 1	54
468	Draft	After Unloading	A20220001	PER/2022/0001		Placement 1	54
4501	Draft	After Unloading	A20210191	PER/2021/0162		Placement 1	6666
4500	Draft	After Unloading	A20210209	PER/2021/0180		Placement 3	908

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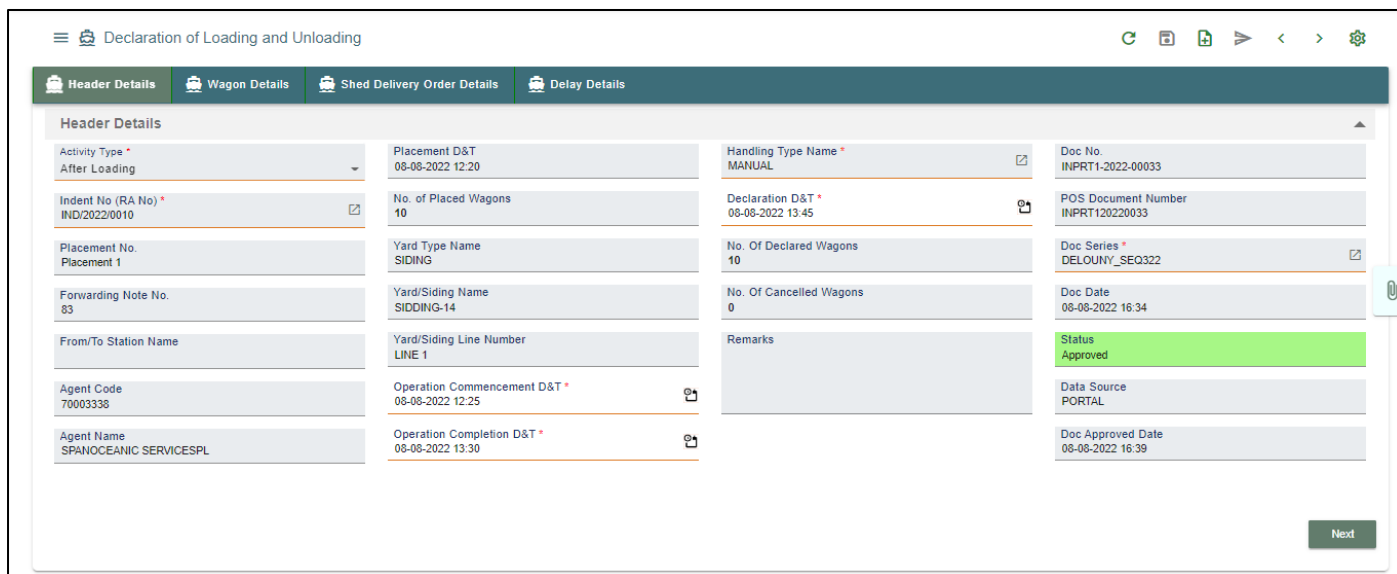
User Interface Image 115-Declaration of loading & Unloading (List Data) 7.5.1.8

50.4.2 Declaration of Loading and Unloading –(Loading)

Header Details:

Step 1 - Once clicked on Add New button from top of the tool bar, Declaration of Loading and Unloading Header Details screen will appear like below

User Interface Image 116: Declaration of Loading and Unloading – 7.5.2.1

➢ Select Activity Type from drop down list, either it is Unloading or Loading

If Selected Activity Type is **Loading** then following details required to enter:

➢ Select Indent Number (RA No) from Lookup button
➢ Placement Number, Forwarding Note Number, Placement Date and Time, Number of Wagons Placed, Yard Type, Yard/Siding Name, Yard/Siding Line Number fields are auto populated based on selection of Indent Number (RA No)
➢ Enter Operation Commencement Date and Time from date picker
➢ Enter Operation Completion Date and Time from date picker
➢ Select Handling Type from Lookup button
➢ Enter Tarpaulin Covering Start Date and Time from date picker. It is not mandatory to enter
➢ Enter Tarpaulin Covering End Date and Time from date picker. It is not mandatory to enter
➢ Enter Declaration Date and Time from date picker
➢ Enter the Remarks if any
➢ Draft Number, Doc Series, Doc Date, Status Code, Doc Approved Date, and Source fields are auto populated by the system

Step 2 – Onceallthe necessary fields are filled, click **Next** button from the bottom of the page. Then Wagon Details page redirected as like below

Click on ⊕ Add Row to begin with data entry
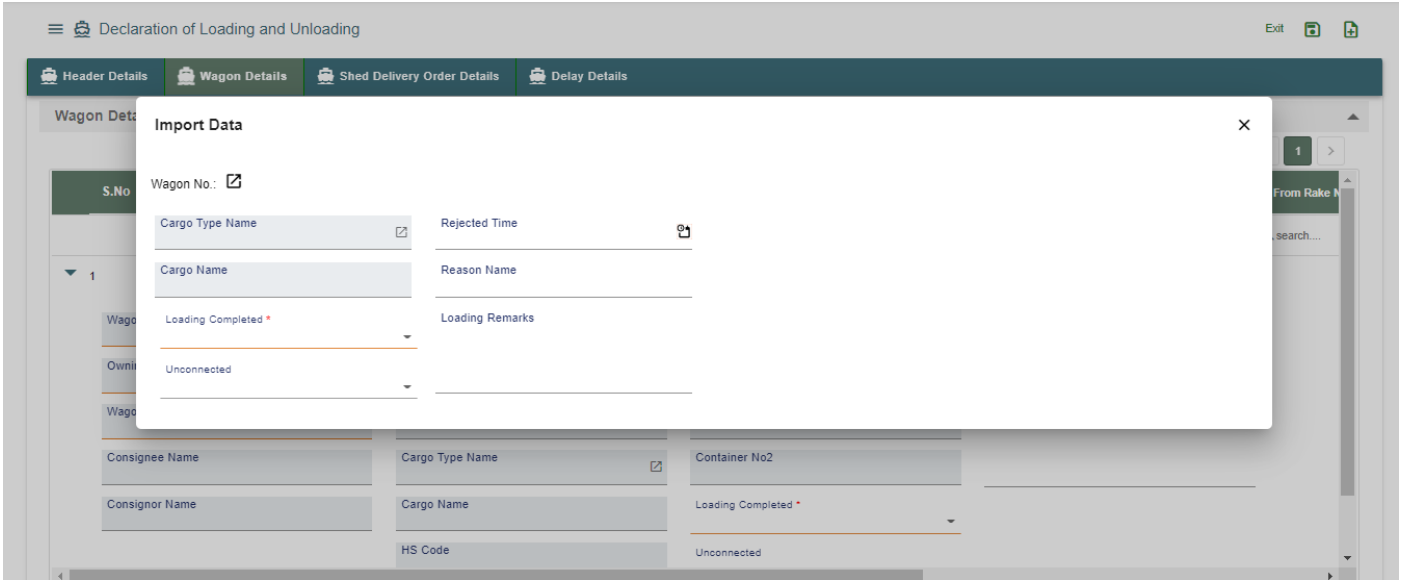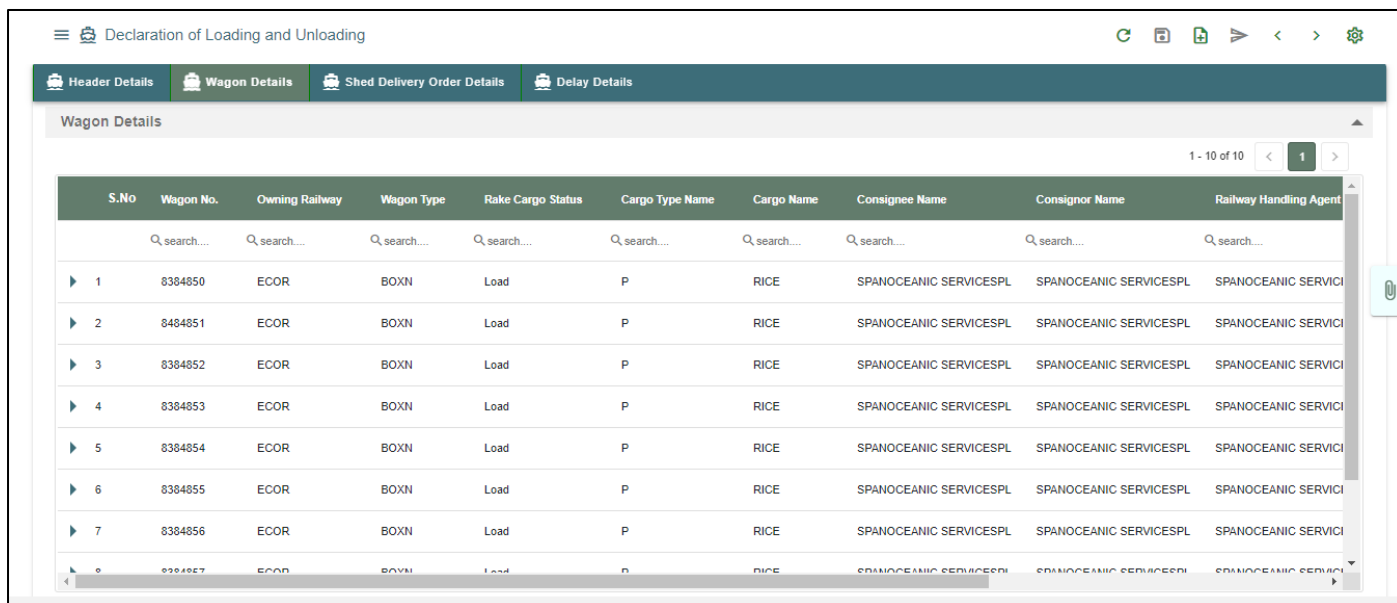
User Interface Image 117: Declaration of Loading and Unloading – 7.5.2.2

Step 3 – Once ⊕ Add Row is selected, then following Wagon Details line item fields will be populated to enter
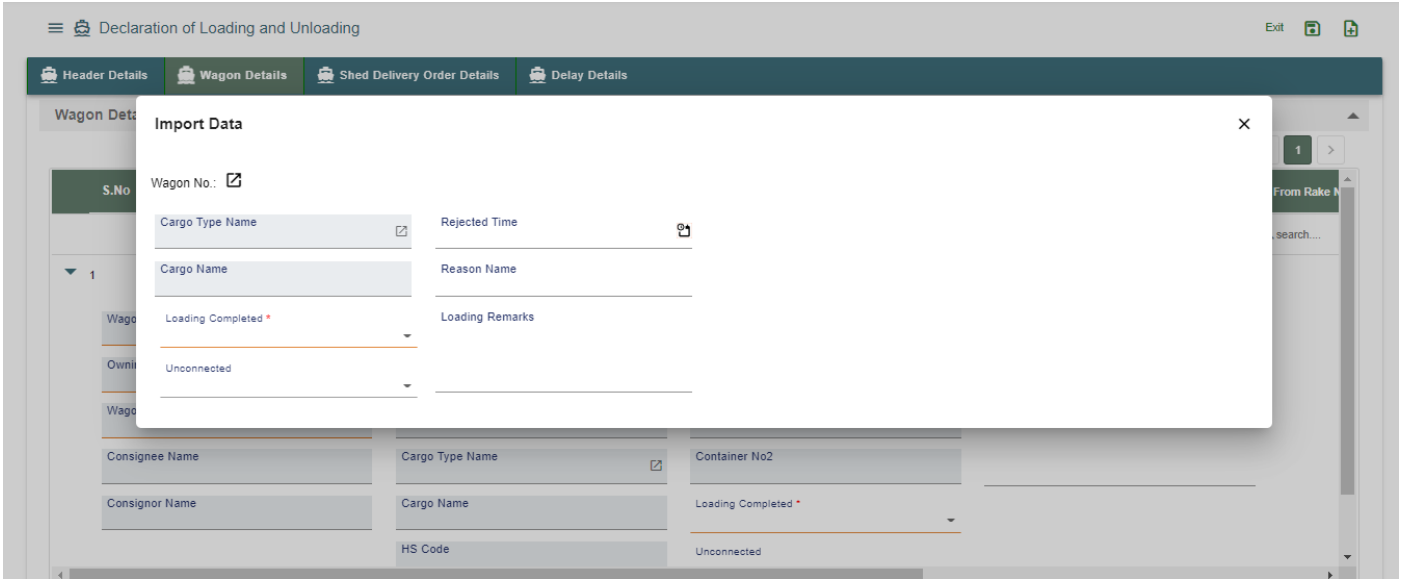
User Interface Image 118: Declaration of Loading and Unloading – 7.5.2.3

User Interface Image 119: Declaration of Loading and Unloading – 7.5.2.4

- ➢ Select Wagon Number from Lookup button
- ➢ Owning Railway, Wagon Type, Cargo Status, Cargo Type, Cargo Description fields are auto populated based on selection of Wagon Number
- ➢ Select Seal Condition from drop down button either it is Yes or No
- ➢ Select Unloading Completed from drop down button either it is Yes or No
- ➢ Enter Tippling Start Date and Time. It is not mandatory field to enter
- ➢ Enter Tippling End Date and Time. It is not mandatory field to enter
- ➢ Enter Unloading Remarks if any

Step 4– Onceallthe necessary fields are filled, click **Next** button from the bottom of the page. Then delay lines page redirected as like below

Click on **⊕ Add Row** to begin with data entry

User Interface Image 120: Declaration POf Loading and Unloading – 7.5.2.5

- ➢ Select on account drop down (port / railway/party)
- ➢ Select delay reason code fro look up

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➢ Select from and to (date and time)

Step 5: Adding the files manually Once the record got saved, Click on the [icon]. Then the user will be redirected to the popup window as below –

User Interface Image 121-Declaration of loading & Unloading (Attachments) 7.5.2.6

Step 6: Click on [+ Add files] button/ Drag Files here, to upload , Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

User Interface Image 122-Declaration of loading & Unloading (Attachments Documents) 7.5.2.7

Once all the mandatory and required fields are filled then Click on **Upload** button. System will display **File uploaded** status on the screen. Respective Form Name , Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [icon] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [icon] icon .

Respective Form Name , Section name will display to attach the documents*File Required.

Attachments (2)   X

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☐	1.	Cargo Related Documents	Azure				*File Required
Vessel Registration P & I							
☐	1.	Vessel Related Documents	Cargo Declaration (FAL form 2)				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload   Close

Now Click on the Check boxes accordingly, then Select files button will be enable.

Select respective files / Drag Files here, to upload , Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Attachments (2)   X

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☑	1.	Cargo Related Documents	Azure				*File Required
Vessel Registration P & I							
☑	1.	Vessel Related Documents	Cargo Declaration (FAL form 2)				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload   Close

Attachments (2)   X

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☑	1.	Cargo Related Documents	Azure				*File Required
Vessel Registration P & I							
☑	1.	Vessel Related Documents	Cargo Declaration (FAL form 2)				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload   Close

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Attachments (2)   **X**

SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration						
☑ 1.	Cargo Related Documents	Azure				*File Required
Vessel Registration P & I						
☑ 1.	Vessel Related Documents	Cargo Declaration (FAL form 2)				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload   Close

Once all the mandatory and required fields are filled then Click on Upload button. System will display the status File uploaded on the screen.

Attachments (2)   X

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☐	1.	Cargo Related Documents	Azure	02-03-2021 15:45:50	18-03-2021 15:45:51	🗎 Sample__1_.docx	🗑
Vessel Registration P & I							
☐	1.	Vessel Related Documents	Cargo Declaration				*File Required

+ Add files   **Select files**

or

SNo.	Attachment Type Name*	Attachment Name*	Cerificate Valid From D&T*	Certificate Valid To D&T*	Certificate Name*	Clear
1.	☰		🗓	🗓 Sample (2).docx (9.62 kb)		⊗

Upload   Close

Click On Close Button

Attachments (4)   X

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☐	1.	General Document	AAA	02-03-2021 15:49:43	23-03-2021 15:49:44	🗎 Sample__2_.docx	🗑
☐	2.	Cargo Related Documents	Azure	02-03-2021 15:45:50	18-03-2021 15:45:51	🗎 Sample__1_.docx	🗑
☐	3.	General Document	AAA	02-03-2021 15:50:05	31-03-2021 15:50:06	🗎 __Sample__2_.doc	🗑

+ Add files   **Select files**

or

Drag files here, to upload

Upload   Close

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Step 7: Click on the Save button from the top right corner to save the Declaration of loading & Unloading Form. Once the record got saved successfully, then the system will display

✅ **Record saved**   message.

Step 8: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step 9: Once the workflow is initiated click on the icon.System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ℹ️ Send user Profile for Approval

ℹ️ Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP

Step 10: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the

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document status will be changed as 'REJECTED'.

Step 11: Once the workflow is in WFAPP. click on [icon] the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[Approve] [Reject]

Step 12: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject

the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 13: While if there is any changes or error we can cancel the record by clicking the [icon] icon shown.

After clicking the icon system will display **Confirmation required** with below alert ok and Back

Alert Message ✕

ⓘ Do you want to cancel?

[Ok]   [Back]

By Clicking on Back we can go to the previous screen. By clicking Ok we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to CANCEL

Step 14: Upon Save / Approve /Reject /Cancel the record that can be seen in **List Data** as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 123-Declaration of loading & Unloading (List Data) 7.5.2.8

50.5 FIELD INFORMATION

For unloading:-

Field Name	Mandatory	Fill Type
Activity Type	Yes	Check Box
Arrival Rake Number	Yes	Look Up
Permission Number(RA No)	No	Auto Populated

Placement Number	No	Drop Down List
Rake ID	No	Auto Populated
Set Rake Number	No	Auto Populated
Placement Date and Time	No	Date and Time
Number of Wagons Placed	No	Auto Populated
Yard Type	No	Auto Populated
Yard Name	No	Auto Populated
Yard Line Number	No	Auto Populated
Operation Commencement Date and Time	Yes	Date and Time
Operation Completion Date and Time	Yes	Date and Time
Handling Type	Yes	Look Up
Tippler Name	No	Auto Populated
Declaration Date and Time	Yes	Date and Time
No of Wagons Declared	No	Auto Populated
Sr.No	No	Text Box
Wagon Number	Yes	Look Up
Owning Railway	No	Auto Populated
Wagon Type	No	Auto Populated
Cargo Type	No	Auto Populated
Cargo Description	No	Auto Populated
Seal Condition	No	Auto Populated or Drop down
Unloading Completed	Yes	Drop Down List
Unloading Remarks	No	Manual Entry
Tippling Start Date and Time	Yes	Date and Time

Tippling End Date and Time	Yes	Date and Time
Cargo Status	No	Auto Populated
Delay on Account	Yes	Dropdown
Delay Reason	Yes	Lookup
From Date and Time	Yes	Date and Time Picker
To Date and time	Yes	Date and Time Picker
Duration	No	Autopopulated
Delay Remarks	No	Text Box

For loading:-

Indent Number (RA No)	Yes	Look Up
Placement Number	No	Auto Populated
Forwarding Note Number	No	Auto Populated
Placement Date and Time	No	Date and Time
Number of Wagons Placed	No	Auto Populated
Yard Type	No	Auto Populated
Yard Name	No	Auto Populated
Yard Line Number	No	Auto Populated
Operation Commencement Date and Time	Yes	Date and Time
Operation Completion Date and Time	Yes	Date and Time
Handling Type	Yes	Look Up
Covering Tarpaulin Start Date and Time	No	Date and Time
Covering Tarpaulin End Date and Time	No	Date and Time
Tarpaulin Covering Agent	No	Text Box
Declaration Date and Time	Yes	Date and Time
No of Wagons Declared	No	Auto Populated
No of Wagons Rejected	No	Auto Populated
Sr.No	No	Text Box
Person Name	Yes	Text Box
Gate Pass Number	Yes	Text Box
Company Name	Yes	Text Box
Sr.No	No	Text Box
Wagon Number	Yes	Look Up
Owning Railway	No	Auto Populated
Wagon Type	No	Auto Populated
Consignee	No	Auto Populated
Consignor	No	Auto Populated
Handling Agent	No	Auto Populated
From Rake Number	No	Auto Populated

Loading Completed	Yes	Drop Down List
Rejected Type (Old Cancel Type)	No	Drop Down List
Reason	No	Text Box
Rejected Time (Old Cancelled Time)	No	Date aand Time
Remarks	No	Text Box
Cargo Type	No	Auto Populated
Cargo Description	No	Auto Populated
Cargo Status	No	Auto Populated
Delay on Account	Yes	Dropdown
Delay Reason	Yes	Lookup
From Date and Time	Yes	Date and Time Picker
To Date and time	Yes	Date and Time Picker
Duration	No	Autopopulated
Delay Remarks	No	Text Box

51. BUSINESS FUNCTION NAME: RAIL RECEIPT

51.1 DEFINITION

The Traffic department is to record the Rail Receipt Details in the iPortman Web for Inward and Outward Load Rakes. The Port Associates/Officials will be using this function.

51.2 NAVIGATION:

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU [≡] SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS

Menu Path	Menu Bar →Railways→ Rail Receipt Details → Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA [🔍] AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

51.3 PREREQUISITES – MASTERS

S.No.	Maters List
1	Wagon Type Master
2	Owning Railway

51.4 LIST PAGE SCREENSHOT

Following screenshot from Rail Receipt Details

List Page:

Once entered into the Functional Form – Rail Receipt Details, list page will appear
➢ To enter into the Rail Receipt Details New Page, click on Add New button from top of the tool bar

User Interface Image 266: Rail Receipt Details – 21.5.1.1

51.4.1 RAIL RECEIPT - OUTWARD

Header Details:

Step 1 - Once clicked on Add New button [icon] from top of the tool bar, Rail Receipt Details – Outward Header Details screen will appear like below

User Interface Image 267: Rail Receipt Details – 21.5.1.2

➢ Select Application Type from Drop Down Button either it is Inward or Outward
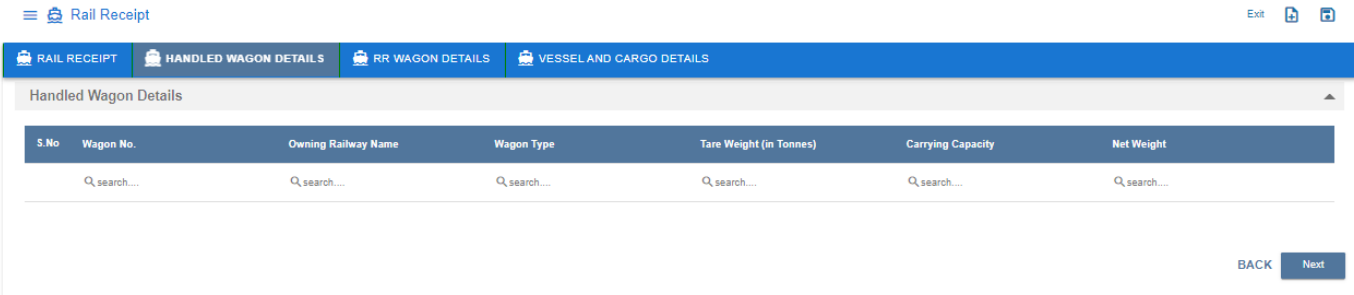
Copy Right @ Envision Enterprise Solutions Pvt. Ltd.

If Application Type is Select as **Outward** then following details required to follow:

➢ Select Indent Number (RA No.) from Lookup Button
➢ Enter RR No. but it should not be duplicate
➢ Enter RR Date from date picker. If integrated with FOIS then this field is auto fetched
➢ Enter RR Received Date from date picker. If integrated with FOIS then this field is auto fetched
➢ From Station, From Station Zone, To Station, To Station Zone, Via Station, Load Category (Trade), Forwarding Note Number, FNR Number, No. of Load Wagons, No. of Empty Wagons, Railway Handling Agent, Consignee, Consignee Address, Consignor, Consignor Address, Billing Agent, Cargo Type, Cargo Description, Total TEU's, No. of 20 Feet Containers, No. of 40 Feet Containers, No. of above 40 Feet Containers, Over Load Weight, Actual Total Weight (Total Net Wt) fields are auto populated based on selection of Indent Number (RA No.) or else if integrated with FOIS then this fields are auto fetched
➢ Enter Forward Note Date from date picker. It is not mandatory to field to enter. If integrated with FOIS then this field is auto fetched
➢ Enter Chargeable Distance. If integrated with FOIS then this field is auto fetched
➢ Enter Handled By. If integrated with FOIS then this field is auto fetched
➢ Enter Invoice Number. If integrated with FOIS then this field is auto fetched
➢ Enter Invoice Date from date picker. If integrated with FOIS then this field is auto fetched
➢ Select TRFC Type from Drop Down Button either it is PC (Pvt. Coal) or GG (Govt. Coal). If integrated with FOIS then this field is auto fetched
➢ Select RR Cargo Code from Lookup Button. If integrated with FOIS then this field is auto fetched
➢ Enter Risk Rate. If integrated with FOIS then this field is auto fetched
➢ Enter Sender Weight (Exemption Wt). If integrated with FOIS then this field is auto fetched
➢ Enter Chargeable Weight. If integrated with FOIS then this field is auto fetched
➢ Enter Chargeable Class. If integrated with FOIS then this field is auto fetched
➢ Enter Chargeable Rate. If integrated with FOIS then this field is auto fetched
➢ Enter Low Punitive Weight (POL1). If integrated with FOIS then this field is auto fetched
➢ Enter Low Punitive Class. If integrated with FOIS then this field is auto fetched
➢ Enter Low Punitive Rate. If integrated with FOIS then this field is auto fetched
➢ Enter High Punitive Weight (POL2). If integrated with FOIS then this field is auto fetched
➢ Enter High Punitive Class. If integrated with FOIS then this field is auto fetched
➢ Enter High Punitive Rate. If integrated with FOIS then this field is auto fetched
➢ Enter Weight Unit (UOM). If integrated with FOIS then this field is auto fetched
➢ Enter Total Chargeable Weight. If integrated with FOIS then this field is auto fetched
➢ Enter Other Charges. If integrated with FOIS then this field is auto fetched
➢ Enter Rebate. If integrated with FOIS then this field is auto fetched
➢ Enter Base Freight. If integrated with FOIS then this field is auto fetched
➢ Enter GST Amount. If integrated with FOIS then this field is auto fetched
➢ Enter RR Tax Invoice Number. If integrated with FOIS then this field is auto fetched
➢ Enter Miscellaneous Charges. If integrated with FOIS then this field is auto fetched
➢ Enter D.P.O. If integrated with FOIS then this field is auto fetched
➢ Enter D.S. If integrated with FOIS then this field is auto fetched
➢ Enter Total Freight Amount. If integrated with FOIS then this field is auto fetched
➢ Select Paid RR from Drop down Button either it is Yes or No. If integrated with FOIS then this field is auto fetched
➢ Total No. of Packages (Articles) is auto calculated based on Submission of Wagon Details. Or else If integrated with FOIS then this field is auto fetched
➢ Enter the Remarks if any

➢ Doc No., Doc Series, Doc Date, Status Code, Doc Approved Date, and Source fields are auto populated by the system

➢ **Step 2 –** Onceallthe necessary fields are filled, click **Next** button from the bottom of the page. Then Handled Wagon Details page redirected as like below & This Handled Wagon Details are auto populated based on selection of Indent Number (RA No.) or Rake Arrival Number (RA No.)

User Interface Image 268: Rail Receipt Details – 21.5.1.3
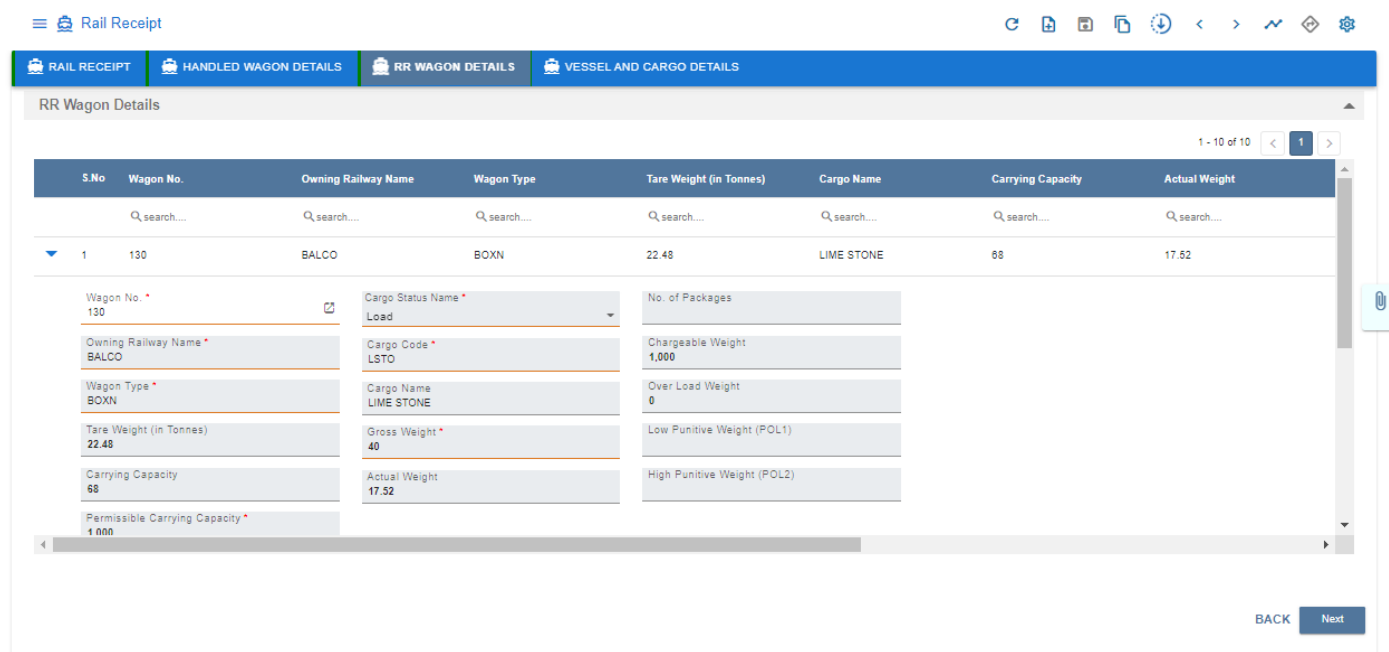
Step 3 – Onceallthe necessary fields are filled, click **Next** button from the bottom of the page. Then Wagon Details page redirected as like below

Click on **⊕ Add Row** to begin with data entry

User Interface Image 269: Rail Receipt Details – 21.5.1.4

Step 4 – Once **⊕ Add Row** is selected, then following Wagon Details line item fields will be populated to enter.

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User Interface Image 270: Rail Receipt Details – 21.5.1.5

- ➢ Wagon Number, Wagon Type, Owning Railway, Cargo Code, Gross Weight, Tare Weight, Actual Weight (Net Weight), No. of Packages (Articles), Carrying Capacity, Overload Weight etc., this fields are auto populated based on selection of Indent Number (RA No.) or Rake Arrival Number (RA No.) Or else if integrated with FOIS then this fields are auto fetched
- ➢ Enter Chargeable Weight. If integrated with FOIS then this field is auto fetched
- ➢ Enter Low Punitive. If integrated with FOIS then this field is auto fetched
- ➢ Enter High Punitive. If integrated with FOIS then this field is auto fetched

Step 5 - Once data is filled in Line item Details, click on save button to save the Wagon Details line item record and click on ⊕ Add Row if need to add multiple Row's or else click on button to save the complete Rail Receiptentry details

- ➢ If any want to update the previous Wagon Details line item which is already saved then click on expansion button ⌄ to update the details and click on save button . If want to delete the particular record line item then click on Delete button 🗑

User Interface Image 271: Rail Receipt Details – 21.5.1.6

Step 6 – Onceallthe necessary fields are filled, click **Next** button from the bottom of the page. Then Vessel & Cargo Details page redirected as like below.

User Interface Image 272: Rail Receipt Details – 21.5.1.7

Step 6: Adding the files manually Once the record got saved, Click on the ⬛ icon. Then the user will be redirected to the popup window as below –

User Interface Image 273-RAIL RECEIPT (Attachments) -21.5.1.8

Step 7: Click on [+ Add files] button/ Drag Files here, to upload , Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

User Interface Image 274-RAIL RECEIPT (Attachments Documents) 21.5.1.9

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display [File uploaded] status on the screen. Respective Form Name , Section name will display along with attached documents.

NOTE: If the attachments added in line level by using 📎 icon system will display respective section name.

		Attachments (1)				X
	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Dredging Request							
☐	1.	Individual Pass Documents	General	02-03-2021 15:17:24	29-03-2021 15:17:26	📄 Sample.docx	🗑

+ Add files   Select files

or

Drag files here, to upload

📄Upload   Close

If the Attachment's are configured, System will display like below when we click on 📎 icon .

Respective Form Name , Section name will display to attach the documents*File Required.

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload , Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on ![Upload] button. System will display the status ![File uploaded] on the screen.

Click On Close Button

Step 8: Click on the Save button from the top right corner to save the RAIL RECEIPT Form. Once the record got saved successfully, then the system will display ✔ Record saved message.

Step 9: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step10: Once the workflow is initiated click on the icon.System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the following Successfully Status changed to WFAPP status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. Successfully rejected. And the document status will be changed as 'REJECTED'.

Step12: Once the workflow is in WFAPP. Click on ⬆️ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[Approve] [Reject]

Step13: Once the user Approve the request the Successfully Status changed to APPROVED following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the

request following alert will display on the screen. Successfully rejected. And the document status will be changed as 'REJECTED'.

Step 14: While if there is any changes or error we can cancel the record by clicking the 📄 icon shown.

After clicking the icon system will display Confirmation required with below alert ok and Back

Alert Message ✕

ⓘ Do you want to cancel?

[Ok]   [Back]

By Clicking on Back we can go to the previous screen. By clicking Ok we can see the below fields in Alert.

Cancellation ✕

Reason Description* [   ]

Remarks [   ]

Requested By [   ]

[Exit] [Proceed]

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to CANCEL

Step 15: Upon Save / Approve /Reject /Cancel the record that can be seen in [List Data] as Draft/Approved/Rejected/Cancel Status respectively

☰ 🚢 Rail Receipt

Doc No.	Status	Application Type	Arrival Rake No.	Arrival Rake / Indent No.	Rail Receipt No.	Arrival D&T	Rail Receipt Date	Rai
🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	🔍 search...	search... 📅	search... 📅	sea
INMAA120220003	Approved	Inward	A20220007	PER/2022/0005	35	11-04-2022 10:18	11-04-2022	19-
INMAA120220002	Approved	Outward		IND/2022/0001	0135133433		04-04-2022	
INMAA120220001	Approved	Inward	A20220001	PER/2022/0001	86451	01-04-2022 10:30	30-03-2022	03-
INMAA120210068	Approved	Inward	A20210215	PER/2021/0185	89454	22-03-2022 15:13	21-03-2022	22-
INMAA120210067	Approved	Outward		IND/2021/0151	151		22-03-2022	
INMAA120210066	Approved	Inward	A20210209	PER/2021/0180	5678	17-03-2022 17:38	17-03-2022	17-
INMAA120210065	Approved	Inward	A20210204	PER/2021/0176	6556	09-03-2022 06:45	08-03-2022	15-
INMAA120210064	Approved	Outward		IND/2021/0146	146		15-03-2022	
184	Draft(Mtrs)	Outward		IND/2021/0145	145		14-03-2022	
INMAA120210063	Approved	Inward	A20210204	PER/2021/0175	985466	09-03-2022 06:45	08-03-2022	13-
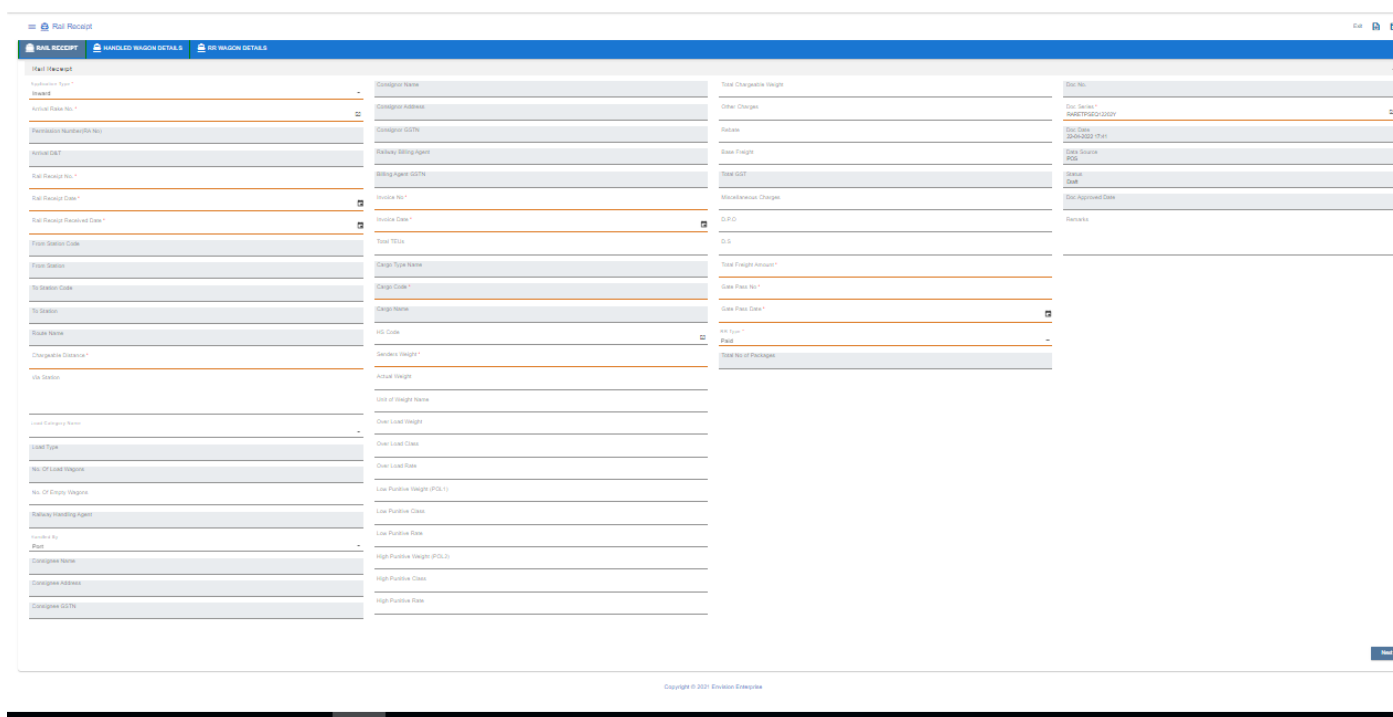
User Interface Image 275-RAIL RECEIPT (List Data) 21.5.1.10

51.4.2. RAIL RECEIPT - INWARD

Header Details:

Step 1 - Once clicked on Add New button [icon] from top of the tool bar, Rail Receipt Details – Inward Header Details screen will appear like below

User Interface Image 276: Rail Receipt Details – 21.5.2.1

➢ Select Application Type from Drop Down Button either it is Inward or Outward
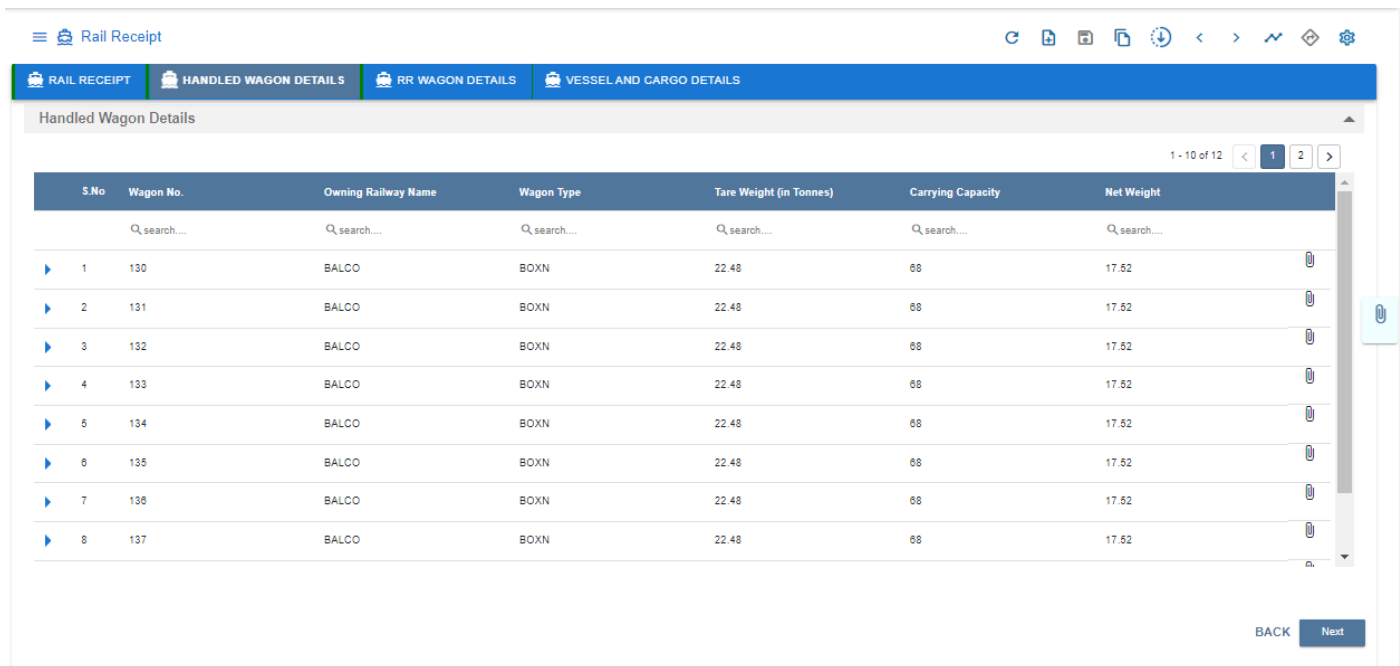
If Application Type is Select as **Inward** then following details required to follow:

➢ Select Arrival Rake Number from Lookup Button
➢ Permission Number (RA No.), Arrival Date and Time, From Station, From Station Zone, To Station, To Station Zone, Via Station, Load Category (Trade), No. of Load Wagons, No. of Empty Wagons, Railway Handling Agent, Consignee, Consignee Address, Consignor, Consignor Address, Billing Agent, Cargo Type, Cargo Description, Total TEU's, No. of 20 Feet Containers, No. of 40 Feet Containers, No. of above 40 Feet Containers, Over Load Weight, Actual Total Weight (Total Net Wt) fields are auto populated based on selection of Indent Number (RA No.) or Rake Arrival Number (RA No.) Or else if integrated with FOIS then this fields are auto fetched
➢ Enter RR No. but it should not be duplicate
➢ Enter RR Date from date picker. If integrated with FOIS then this field is auto fetched
➢ Enter RR Received Date from date picker. If integrated with FOIS then this field is auto fetched
➢ Enter Chargeable Distance. If integrated with FOIS then this field is auto fetched
➢ Enter Handled By. If integrated with FOIS then this field is auto fetched
➢ Enter Invoice Number. If integrated with FOIS then this field is auto fetched
➢ Enter Invoice Date from date picker. If integrated with FOIS then this field is auto fetched
➢ Select TRFC Type from Drop down Button either it is PC (Pvt. Coal) or GG (Govt. Coal). If integrated with FOIS then this field is auto fetched
➢ Select RR Cargo Code from Lookup Button. If integrated with FOIS then this field is auto fetched
➢ Enter Risk Rate. If integrated with FOIS then this field is auto fetched
➢ Enter Sender Weight (Exemption Wt). If integrated with FOIS then this field is auto fetched
➢ Enter Chargeable Weight. If integrated with FOIS then this field is auto fetched

- ➢ Enter Chargeable Class. If integrated with FOIS then this field is auto fetched
- ➢ Enter Chargeable Rate. If integrated with FOIS then this field is auto fetched
- ➢ Enter Low Punitive Weight (POL1). If integrated with FOIS then this field is auto fetched
- ➢ Enter Low Punitive Class. If integrated with FOIS then this field is auto fetched
- ➢ Enter Low Punitive Rate. If integrated with FOIS then this field is auto fetched
- ➢ Enter High Punitive Weight (POL2). If integrated with FOIS then this field is auto fetched
- ➢ Enter High Punitive Class. If integrated with FOIS then this field is auto fetched
- ➢ Enter High Punitive Rate. If integrated with FOIS then this field is auto fetched
- ➢ Enter Weight Unit (UOM). If integrated with FOIS then this field is auto fetched
- ➢ Enter Total Chargeable Weight. If integrated with FOIS then this field is auto fetched
- ➢ Enter Other Charges. If integrated with FOIS then this field is auto fetched
- ➢ Enter Rebate. If integrated with FOIS then this field is auto fetched
- ➢ Enter Base Freight. If integrated with FOIS then this field is auto fetched
- ➢ Enter GST Amount. If integrated with FOIS then this field is auto fetched
- ➢ Enter RR Tax Invoice Number. If integrated with FOIS then this field is auto fetched
- ➢ Enter Miscellaneous Charges. If integrated with FOIS then this field is auto fetched
- ➢ Enter D.P.O. If integrated with FOIS then this field is auto fetched
- ➢ Enter D.S. If integrated with FOIS then this field is auto fetched
- ➢ Enter Total Freight Amount. If integrated with FOIS then this field is auto fetched
- ➢ Select Paid RR from Drop down Button either it is Yes or No. If integrated with FOIS then this field is auto fetched
- ➢ Total No. of Packages (Articles) is auto calculated based on Submission of Wagon Details. Or else If integrated with FOIS then this field is auto fetched
- ➢ Enter the Remarks if any
- ➢ Doc No., Doc Series, Doc Date, Status Code, Doc Approved Date, and Source fields are auto populated by the system

- ➢ **Step 2 –** Once all the necessary fields are filled, click Next button from the bottom of the page. Then Handled Wagon Details page redirected as like below & This Handled Wagon Details are auto populated based on selection of Rake Arrival Number (RA No.)
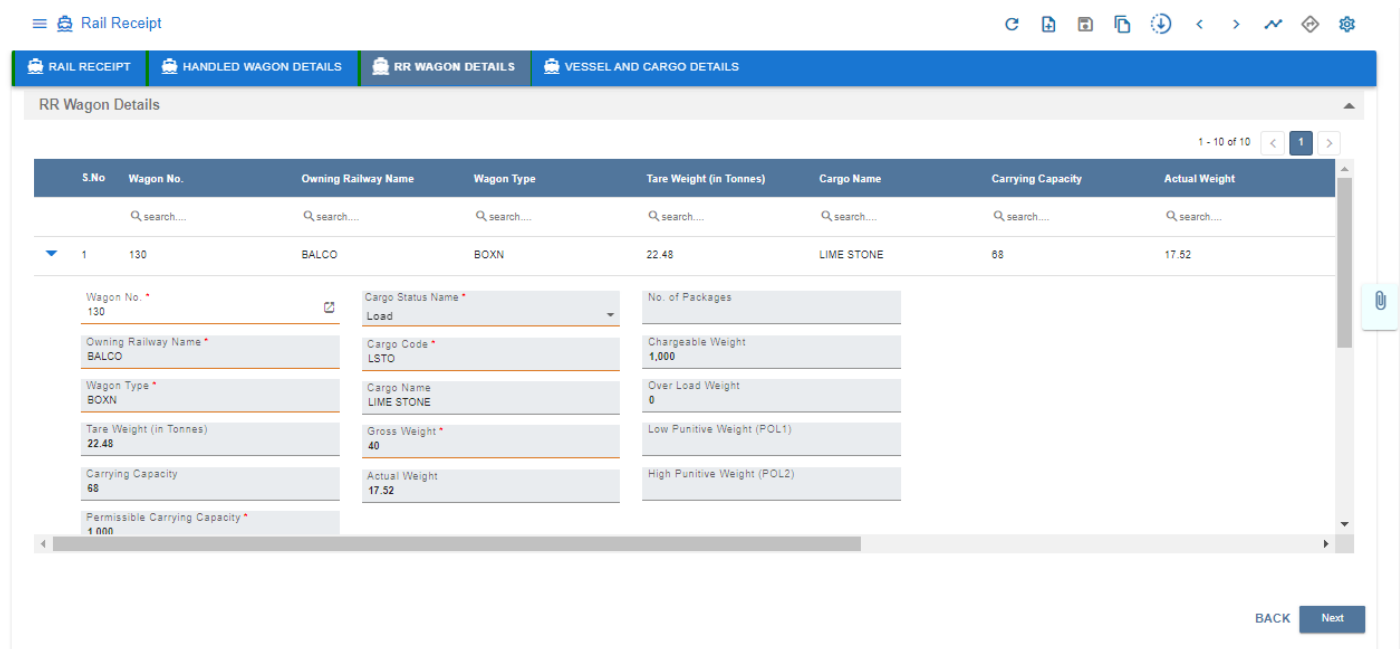
User Interface Image 277: Rail Receipt Details – 21.5.2.2

Step 3 – Onceallthe necessary fields are filled, click **Next** button from the bottom of the page. Then Wagon Details page redirected as like below
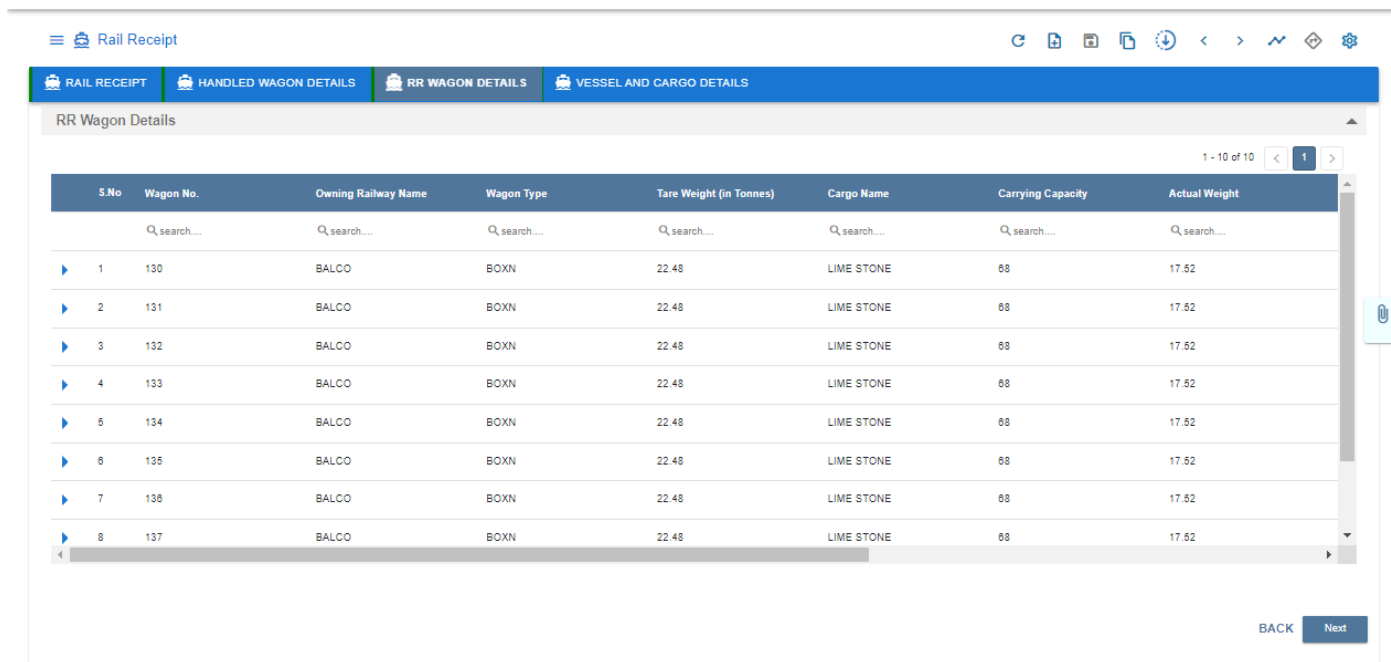
Click on ⊕ **Add Row** to begin with data entry

User Interface Image 278: Rail Receipt Details – 21.5.2.3

Step 4 – Once ⊕ Add Row is selected, then following Wagon Details line item fields will be populated to enter.

User Interface Image 279: Rail Receipt Details – 21.5.2.4

➢ Wagon Number, Wagon Type, Owning Railway, Cargo Code, Gross Weight, Tare Weight, Actual Weight (Net Weight), No. of Packages (Articles), Carrying Capacity, Overload Weight etc., this fields are auto populated based on selection of Indent Number (RA No.) or Rake Arrival Number (RA No.) Or else if integrated with FOIS then this fields are auto fetched
➢ Enter Chargeable Weight. If integrated with FOIS then this field is auto fetched
➢ Enter Low Punitive. If integrated with FOIS then this field is auto fetched
➢ Enter High Punitive. If integrated with FOIS then this field is auto fetched

Step 5 - Once data is filled in Line item Details, click on save button [icon] to save the Wagon Details line item record and click on ⊕ Add Row if need to add multiple Row's or else click on [icon] button to save the complete Rail Receipt entry details

➢ If any want to update the previous Wagon Details line item which is already saved then click on expansion button ⌄ to update the details and click on save button [icon] . If want to delete the particular record line item then click on Delete button [icon]

User Interface Image 280: Rail Receipt Details – 21.5.2.5

Step 6: Adding the files manually Once the record got saved, Click on the [paperclip]icon. Then the user will be redirected to the popup window as below –

User Interface Image 281-RAIL RECEIPT (Attachments) -21.5.2.6

Step 7: Click on [+ Add files] button/ Drag Files here, to upload , Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

User Interface Image 282-RAIL RECEIPT (Attachments Documents) 21.5.2.7

Once all the mandatory and required fields are filled then Click on **Upload** button. System will display **File uploaded** status on the screen. Respective Form Name , Section name will display along with attached documents.

NOTE: If the attachments added in line level by using 📎 icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [icon] icon .

Respective Form Name , Section name will display to attach the documents*File Required.

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload , Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

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Once all the mandatory and required fields are filled then Click on **Upload** button. System will display the status **File uploaded** on the screen.

Attachments (2) ✕

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☐	1.	Cargo Related Documents	Azure	02-03-2021 15:45:50	18-03-2021 15:45:51	🗎 Sample__1_.docx	🗑
Vessel Registration P & I							
☐	1.	Vessel Related Documents	Cargo Declaration				*File Required

+ Add files   **Select files**

or

SNo.	Attachment Type Name*	Attachment Name*	Cerificate Valid From D&T*	Certificate Valid To D&T*	Certificate Name*	Clear
1.	☰		🗓	🗓	Sample (2).docx (9.62 kb)	✕

Upload   **Close**

Click On Close Button

Attachments (4) ✕

	SNo.	Attachment Type Name	Attachment Name	Cerificate Valid From D&T	Certificate Valid To D&T	File Name	Clear
Vessel Registration							
☐	1.	General Document	AAA	02-03-2021 15:49:43	23-03-2021 15:49:44	🗎 Sample__2_.docx	🗑
☐	2.	Cargo Related Documents	Azure	02-03-2021 15:45:50	18-03-2021 15:45:51	🗎 Sample__1_.docx	🗑
☐	3.	General Document	AAA	02-03-2021 15:50:05	31-03-2021 15:50:06	🗎 __Sample__2_.doc	🗑

+ Add files   **Select files**

or

Drag files here, to upload

Upload   **Close**

Step 8: Click on the Save button ⎙ from the top right corner to save the RAIL RECEIPT Form. Once

the record got saved successfully, then the system will display ✅ Record saved message.

Step 9: Once the record is saved then the document status will be as 'Draft' and then click on workflow

button ↪ .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step 10: Once the workflow is initiated click on ↪ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[   ]

Approve   **Reject**

Successfully Status changed to WFAPP

Step 11: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Step 13: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject

the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 14: While if there is any changes or error we can cancel the record by clicking the icon shown.

After clicking the icon system will display **Confirmation required** with below alert ok and Back

Alert Message X

ⓘ Do you want to cancel?

Ok   Back

By Clicking on Back we can go to the previous screen. By clicking Ok we can see the below fields in Alert.

Cancellation X

Reason Description*

Remarks

Requested By

Exit Proceed

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to CANCEL

Step 15: Upon Save / Approve /Reject /Cancel the record that can be seen in **List Data** as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 283-RAIL RECEIPT (List Data) 21.5.2.8

FIELD INFORMATION

Field Name	Mandatory	Fill Type
Application Type *	Yes	Dropdown
Arrival Rake No.	Inward =Yes Outward =No	Lookup
Permission No / Indent No. (RA No.)	Inward =No Outward =Yes	Lookup
Arrival Date and Time	No	Textbox
RR Number	Yes	Textbox
RR Date	Yes	Calendar
RR Received Date	Yes	Calendar

From Station	No	Textbox
From Station Zone		
To Station	No	Textbox
To Station Zone	No	Textbox
Chargeable Distance	No	Textbox
Via Station	No	Textbox
Load Category (Trade)	No	Textbox
Forward Note Number	No	Textbox
Forward Note Date	No	Date Picker
FNR Number	No	Text Box
No.of Load Wagons	No	Textbox
No.of Empty Wagons	Yes	Textbox
Handling Agent	No	Textbox
Handled By	No	Textbox
Consignee	No	Textbox
ConsigneeAddress	No	Textbox
Consignor	No	Textbox
ConsignorAddress	No	Textbox
Billing Agent	No	Textbox
Invoice Number	Yes	Textbox
Invoice Date	Yes	Textbox
TRFC Type	No	Dropdown
Cargo Type	No	Textbox
RR Cargo Code	Yes	Textbox
Cargo Description	No	Textbox
Risk Rate	No	Textbox
Total TEU's	No	Textbox
No.of 20 Feet containers	No	Textbox
No.of 40 Feet Containers	No	Textbox
No.of above 40 Feet Containers	No	Textbox
Sender Weight (Exemption Wt.)	Yes	Textbox
Actual Total Weight (Total Net Wt.)	No	Textbox
Chargeable Weight	Yes	Textbox
Chargeable Class	No	Textbox
Chargeable Rate	No	Textbox
Over Load Weight	No	Textbox
Over Load Class	No	Textbox
Over Load Rate	No	Textbox
Low Punitive Weight (POL1)	No	Textbox
Low Punitive Class	No	Textbox
Low Punitive Rate	No	Textbox
High Punitive Weight (POL2)	No	Textbox
High Punitive Class	No	Textbox
High Punitive Rate	No	Textbox

Weight Unit (UOM)	No	Textbox
Total Chargeable Weight	Yes	Textbox
Other Charges	No	Textbox
Rebate	No	Textbox
Base Freight	No	Textbox
Taxes This field name should change as "GST Amount"	No	Textbox
RR Tax invoice Number	No	Textbox
Miscellaneous Charges	No	Textbox
D.P.O	No	Textbox
D.S	No	Textbox
Total Freight Amount	Yes	Textbox
Gate Pass Number	No	Textbox
Gate Pass Date	No	Textbox
Paid RR	Yes	Textbox
Total No. of Packages (Articles)	No	Textbox
Remarks	No	Textbox
Sl.No	No	Textbox
Wagon No	No	Textbox
Wagon Type	No	Textbox
Owning Railways	No	Textbox
Tare Weight	No	Textbox
Carrying Capacity	No	Textbox
Gross Weight	No	Textbox
Net Weight (Chargeable Weight)	No	Textbox
Overload Weight	No	Textbox
Sl.No	No	Textbox
Wagon No	No	Textbox
Wagon Type	No	Textbox
Owning Railways	No	Textbox
Cargo Code	Yes	Manual Entry
Gross Weight	No	Manual Entry
Tare Weight	No	Textbox
Actual Weight (Net Wt.)	No	Textbox
No. of Packages (Articles)	No	Textbox
Carrying Capacity	No	Textbox
Chargeable Weight	No	Textbox
Overload Weight	No	Textbox
Low Punitive	No	Textbox
High Punitive	No	Textbox

52. Business Function Name: Yard Receipt

52.1   Definition:

Yard Receipt is the process to recording the shifting or Delivery of cargo from one location to another location. This will be recorded by shed super ident or person in-charge at port for such activity against the approval of Internal Shifting Request raised by the CHA/Importer/Vessel Agent.

52.2   Navigation

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⠿ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo → Yard Operations → Yard Receipt→ Click on **Add New**
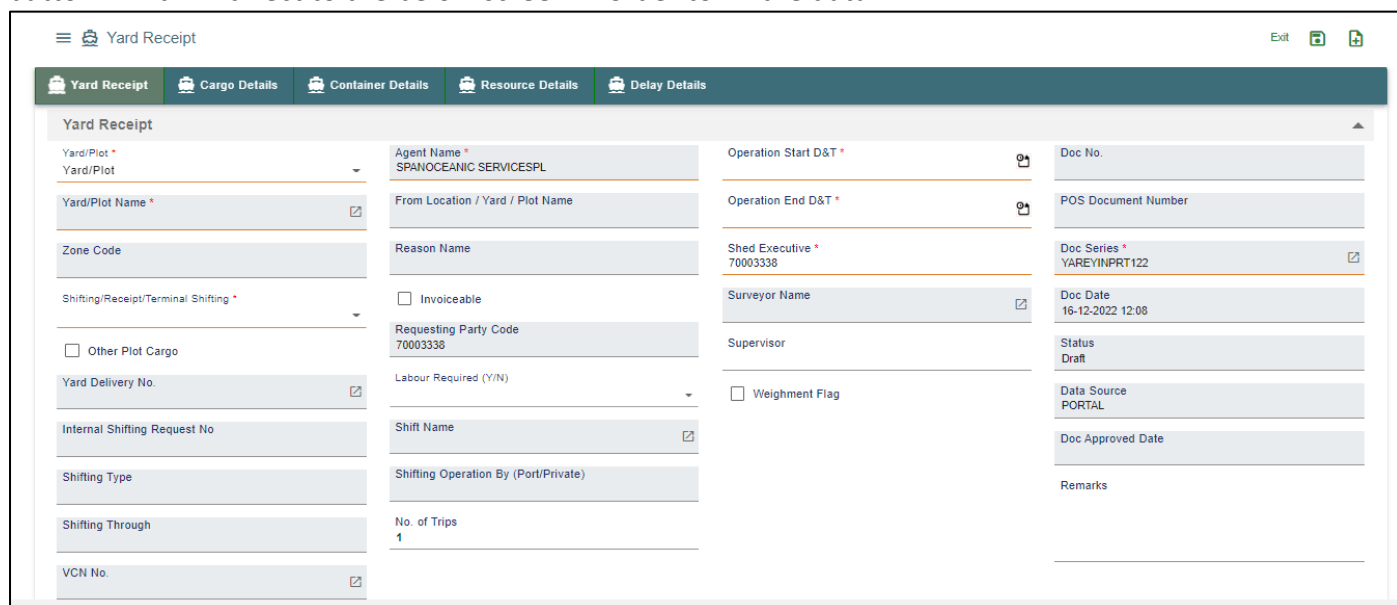
USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

52.3   Prerequisites – Masters

5. Yard/Plot Code
6. Shifting/Delivery
7. Shift
8. Agent Master

52.4   Screenshot

Step 1: After Navigation to the respective function screen, user will move to list data then Click on Add new button 🗋 . It will direct to the below screen in order to fill the data
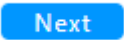
User Interface Image 44–Yard Receipt Header Details 9.1
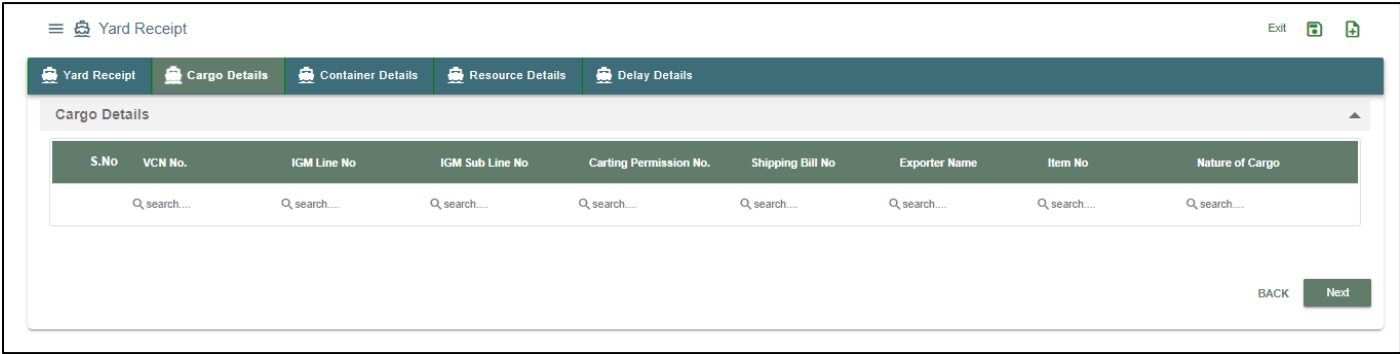
Below are the Field Information regarding Yard Receipt Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Yard/Plot	Yes	LOV
Yard/Plot Code	Yes	LOV
Zone Code	No	Textbox
Shifting/Delivery/Terminal Shifting	Yes	Dropdown
Internal Shifting Request No	Yes	LOV
Storage Allotment No.	No	Textbox
Shifting Type	No	Textbox
Shifting Through	No	Textbox
Shed Delivery Order	No	LOV
Shed Delivery Order Validity Period	No	Textbox
Shed DO Qty	No	Textbox
VCN No	No	Textbox
Vessel Name	No	Textbox
Actual Time of Arrival	No	Textbox
IGM No.	No	LOV
IGM Date	No	Calendar
Rake Application No.	No	Textbox
Importer Name	No	Textbox
To Location/Yard/Plot Name	No	Textbox
Reason Name	No	Textbox
Invoiceable	No	Checkbox
Labour Required(Y/N)	No	LOV
Shift Name	Yes	LOV
Vehicle Registration No	Yes	LOV
Truck Entry Permit No	No	Textbox
Truck Entry Permit Validity	No	Textbox
RFID Card No.	No	Textbox
Truck Status	No	Textbox
CGP No.	No	Textbox
CGP Date	No	Textbox
Shed Executive	Yes	Textbox
Agent Code	No	Textbox
Agent Name	No	Textbox
Shifting Operation By Code	No	Textbox
Shifting Operation By	No	Textbox
Total No of Containers	No	Textbox
Shifting Reason	No	LOV
Vessel Completion Date	No	Textbox
Cargo Discharge Date	No	Textbox
LFD	No	Textbox
Shifted Quantity	No	Textbox
Total No of Trips	No	Textbox
Total Operation Time	No	Date Time

Step 2: Once data is filled in above Screen with all asterisk mark (*) fields which are mandatory, click on save button 🖫 and proceed to click on **Next** button for Cargo Details Screen shown below.
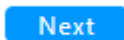
User Interface Image 45–Yard Receipt Cargo Details 9.2
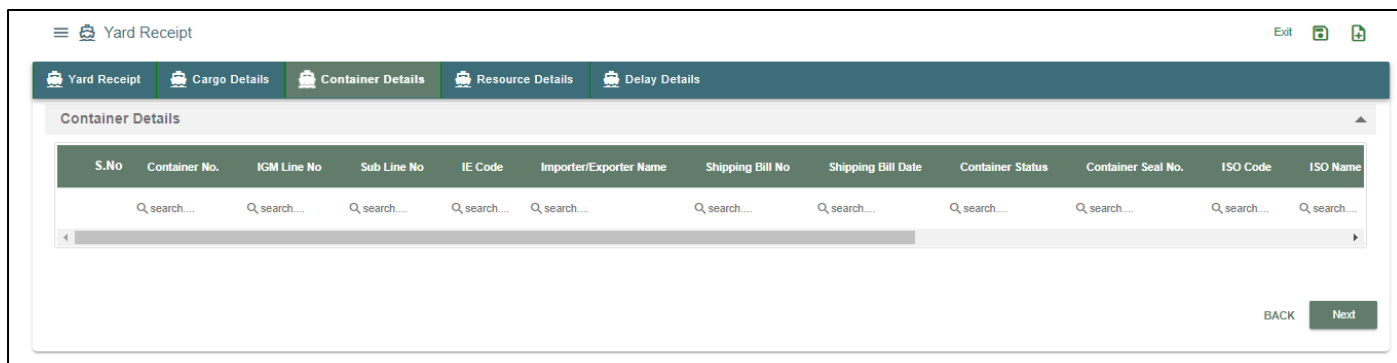
Below are the Field Information regarding Cargo Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Container or Cargo	No	Dropdown
IGM Line No	No	Textbox
Sub Line No	No	Textbox
B/L No	No	Textbox
House B/L No	No	Textbox
Nature of Cargo	No	Textbox
Carting Bill Item No	No	Textbox
No of Packages	No	Textbox
Type of Package	No	Textbox
Gross Weight	No	Textbox
Unit of Weight	No	Textbox
Gross Volume	No	Textbox
Unit of Volume	No	Textbox
Marks & Number	No	Textbox
Goods Description	No	Textbox
Shifting Quantity	No	Textbox
No of Trips	No	Textbox
Balance Quantity	No	Textbox

Step 3: Based on selection of Header Details Cargo Details will be auto populated click on **Next** button to go for below screen of Container Details as shown below.
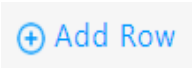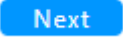
User Interface Image 46–Yard Receipt Good on Vehicle 9.3
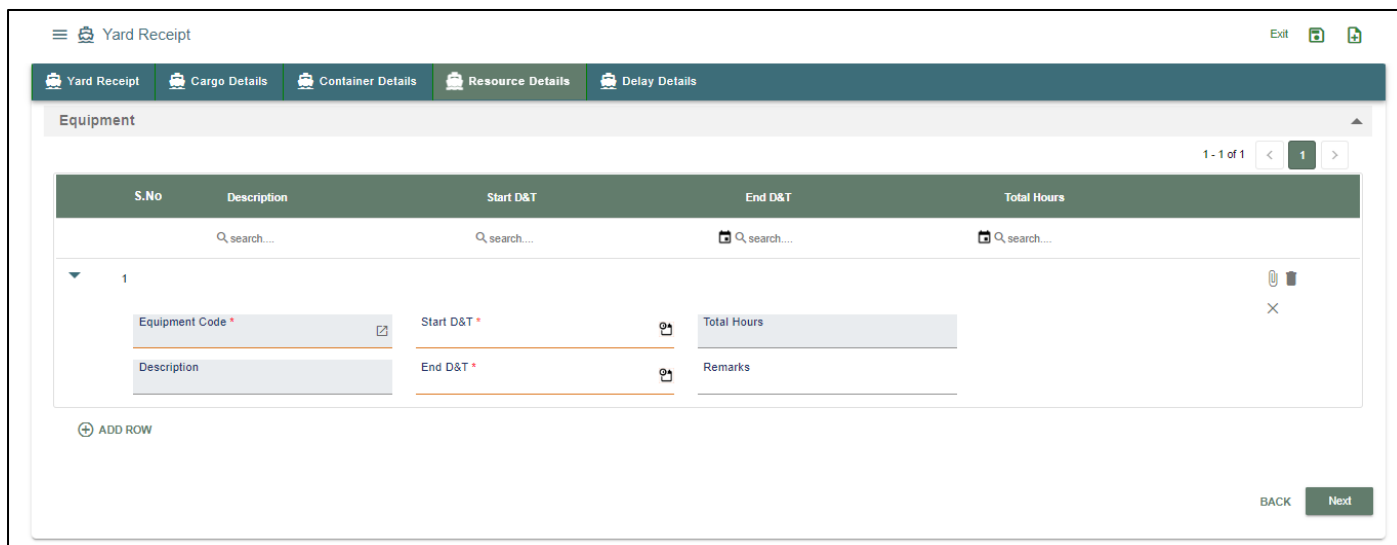
Below are the Field Information regarding Container Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field name	Mandatory	Fill Type
IGM Line No	No	LOV
IGM Sub Line No	No	Textbox
Container No	Yes	Textbox
Container Status	No	Textbox
Container Seal Status	No	Textbox
ISO Code	No	Textbox
Total No of Packages	No	Textbox
Container Weight	No	Textbox
SOC Flag(Yes/No)	No	Textbox
Container Agent Name	No	LOV
Location Name	No	LOV
Driver Name	No	Textbox
Truck No	No	Textbox
Total Operation Time	No	Textbox
ODC Flag	No	Textbox
Total No of Containers	No	Textbox

Step 4: Once data is filled in Resource Details, click on save button and click on ⊕ Add Row if need to add multiple Row's or else click on Next button to go for below screen to record Equipment Details.

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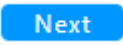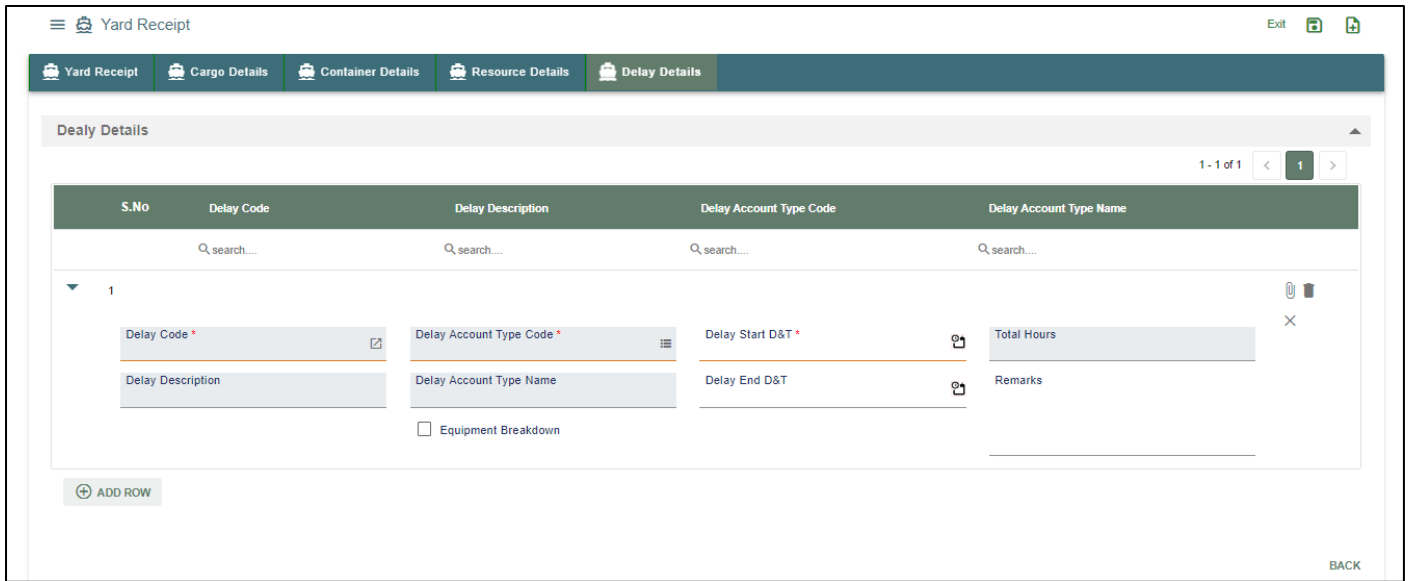
User Interface Image 47– Yard Receipt Equipment Details 9.4

Below are the Field Information regarding Resource Details Section.
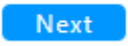
(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)
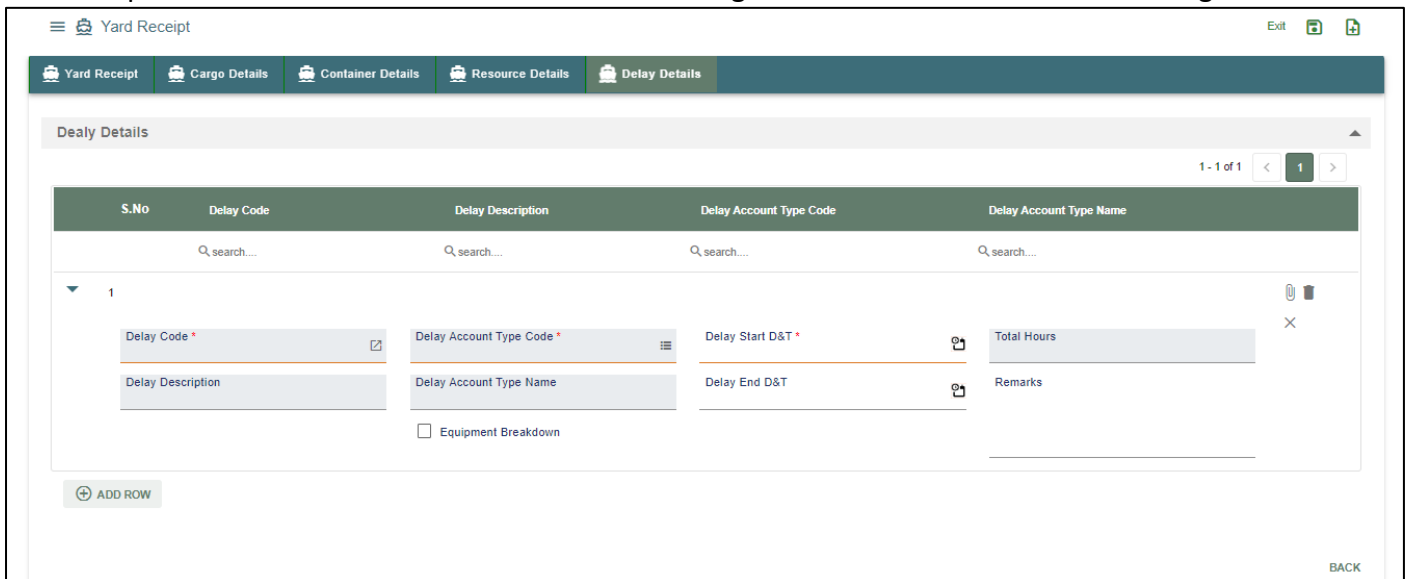
Field Name	Mandatory	Fill Type
Equipment Name	No	LOV
Cargo Name	No	Textbox
To Location/Yard/Plot Name	No	Textbox
Received No of Packages	No	Textbox
Balance No of Packages	No	Textbox
Approx./Net Qty	No	Textbox
No. of Equipment	No	Textbox
Driver Name	No	Textbox
Truck No	No	Textbox
Start Date & Time	Yes	Date Time
End Date & Time	Yes	Date Time
Total Time	No	Date Time
Weighbridge Name	No	LOV
Weighbridge In Time	Yes	Date Time
Weighbridge Out Time	Yes	Date Time
Tare Weight	No	Textbox
Gross Weight	No	Textbox
Net Quantity	Yes	Textbox
Remarks	No	Textbox

Step 5: Once data is filled in Equipment Details, click on save button and click on ⊕ Add Row if need to add multiple Row's or else click on Next button to go for below screen to Delay Details.

User Interface Image 48– Yard Receipt Delay Details 9.5

Step 6: Once data is filled in Delay Details, click on save button [icon] and click on [Add Row] if need to add multiple Row's or else click on [Next] button to go for below screen to Vehicle Change Details.

User Interface Image 49– Yard Receipt Vehicle Change Details 9.6

Below are the Field Information regarding Delay Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Delay Code	Yes	LOV
Delay Description	No	Textbox
Delay Account Type Code	Yes	LOV

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Delay Start Date & Time	Yes	Date Time
Delay End Date & Time	No	Date Time
Total Delay Time	No	Date Time
Equipment Code	Yes	LOV
Description	No	Textbox
Start D&T	Yes	Date Time
End D&T	Yes	Date Time
Total Hours	No	Textbox
Remarks	No	Textbox
Employee Name	Yes	LOV
Employee Type Name	Yes	LOV
Start D&T	No	Date Time
End D&T	No	Date Time
Over Time	No	Dropdown
Over Remarks	No	Textbox

Step 7:- Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields. And Click on [icon] button. And On-screen notification will be LOV as [Record saved]

Step 8(a): Adding the files manually once the record got saved, Click on the [icon] icon. Then the user will be redirected to the popup window as below –

Click on [+ Add files] button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [icon] icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on [icon] icon.

Respective Form Name, Section name will display to attach the documents*File Required.x

Now Click on the Check boxes accordingly, then Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (2)

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☑ 1.	Cargo Related Documents	International Load Line Certificate				*File Required
☑ 2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

Once all the mandatory and required fields are filled then Click on Upload ⬆ button. System will display the status **File uploaded** on the screen.

Attachments (2)

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☑ 1.	Custom Related Document	Transhipment Permit				*File Required
☐ 2.	Cargo Related Documents	International Load Line Certificate				*File Required

+ Add files   Select files

or

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	Certificate Name	Clear
1.	Custom Related	Transhipmen 🔗	📅	📅	CHPT--CQA--SDO--BTT.png (224.39 kb)	🗑

Upload ⬆   Close ✕

Click On Close Button

Click on the Save button 🖫 from the top right corner to save Form. Once the record got saved successfully, then the system will display ✔ **Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on the icon. System will be display

 with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

 with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the Successfully Status changed to APPROVED following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. Successfully rejected. And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the icon shown. After clicking the icon system will display Confirmation required with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display Ok and status will change to

CANCEL

By Clicking on We can view the Success Status of the record

Data Submit Status   **X**

Portal Integration

Status: SUCCESS

End Point Code	Status	Response
IPAPRJCTYADETPPRTLCHPTOB	SUCCESS	record saved successfully id = 3225

Pos Integration

Status: SUCCESS

End Point Code	Status	Response
IPAPRJCTYARDELSAP	SUCCESS	{ "status":"message received" }

Step 18: While if there is any changes we can amend the record by clicking the icon shown. After

clicking the icon system will display **Confirmation required** with below alert message.

Alert Message   ×

ⓘ Do you want to Amend?

NO   YES

By Clicking on No we can go to the previous screen. By clicking yes we can see ✓ Ok Alert and status code

changed to 'AMEND'

Step 19: Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

Step 20: Click on icon to new popup window will display. And can Clear / Search the records with multiple inputs.

By Clicking on can clear the inputs in the columns. By Clicking on No of Records per page Drop down can select 10/20/30/40 records to view in List page.

By Clicking on Load the records and display the data.

53. BUSINESS FUNCTION NAME: EXPORT APPLICATION

53.1 DEFINITION

Exporter / CHA submit Export application as a request to the port to collect advance Wharfage/other cargo related charges like levy/Carnage charges for the cargo Exported. Export application can be submitted through online portal which further goes for validation and verification in iPortman® system.

53.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo→ Export Documentation → Export Application → Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME
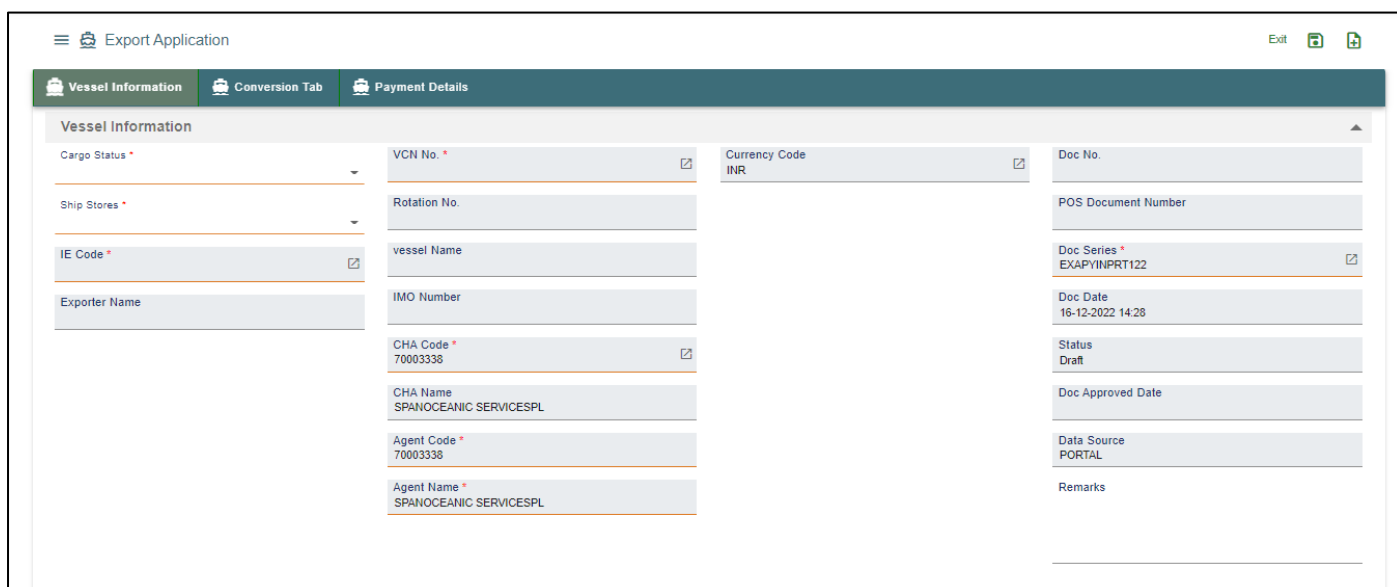
53.4 PREREQUISITES – MASTERS

1. Exporter
2. Agent
3. CHA
4. Cargo
5. Cargo Type
6. UOM

53.4 SCREENSHOT

Following screenshot from Export Application.

Step 1- Click on Add new button . We will redirect to screen like below.

User Interface Image 80-Export Application-14.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Vessel Information Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field	Mandatory	Fill Type
VCN No.	Mandatory	Pop Up
Rotation No.	Non Mandatory	Textbox
Vessel Name	Non Mandatory	Textbox
IMO Code	Non Mandatory	Textbox
IE Code*	Mandatory	Pop Up
Exporter Name	Non Mandatory	Textbox
Bill To Party Code	Non Mandatory	Textbox
Handling Agent	Non Mandatory	Pop up
CHA Name	Mandatory	Textbox
CHA Code	Mandatory	Textbox
Currency	Non Mandatory	Textbox

Step 3: Click [icon] Service line button from Top Menu Bar to save Export Application form record. Once it is saved Commercial Invoice tab will be activated to Commercial Invoice add details and click on ADDROW button

Select Cargo status=Foreign and Ship stores=No

Below are the Field Information regarding Commercial Invoice Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Service Code	Mandatory	Pop Up
Service Name	Non Mandatory	Textbox
Shipping Bill No*	Mandatory	Pop Up
Shipping Bill Date		
Check List No	Non Mandatory	Pop Up
Total Cargo Quantity(SB)	Non Mandatory	Textbox
Total No. of Packages (SB)	Non Mandatory	Textbox
CHA Code	Non Mandatory	
Mandatory"	Textbox	
Shipping Bill Item No*	Mandatory	Pop Up
Line No.		
GTI	Mandatory	Textbox
Sub-line no		
Line Quantity	Mandatory	Textbox
Total Cargo Quantity(SB)	Non Mandatory	Textbox
Total No. of Packages (SB)	Non Mandatory	Textbox
CHA Code	Non Mandatory	
Shipping Bill Item No*	Mandatory	Pop Up
Line No.		
GTI	Mandatory	Textbox
Sub-line no		
Line Quantity	Mandatory	Textbox
Commodity Code	Mandatory	Textbox
No. of Pkgs	Mandatory	Textbox

Type of cargo	Mandatory	Textbox
Approx. Receipt Quantity	Mandatory	Textbox
Approx. Receipt No. of Packages	Mandatory	Textbox
Cargo Gate in Date & Time	Non Mandatory	Date and Time picker
Last Free Date	Non Mandatory	Date picker
Expected date of shipment	Not Mandatory	Date picker
Mode of Receipt		Dropdown
Delivery Receipt Shed Location	Non-Mandatory	
Storage Allotment No.	Mandatory	
Cargo Location	Non-Mandatory	Love
Bill To Party Code	Non Mandatory	Textbox

Step 4: Once Commercial Invoice Details are saved, Shipping Bill line Details will be activated as below to Shipping Bill line Details as shown in below screen and click on ADD ROW Button.

Step 4: Once Shipping Bill Details are saved, Conversion Tab Details will be activated as below
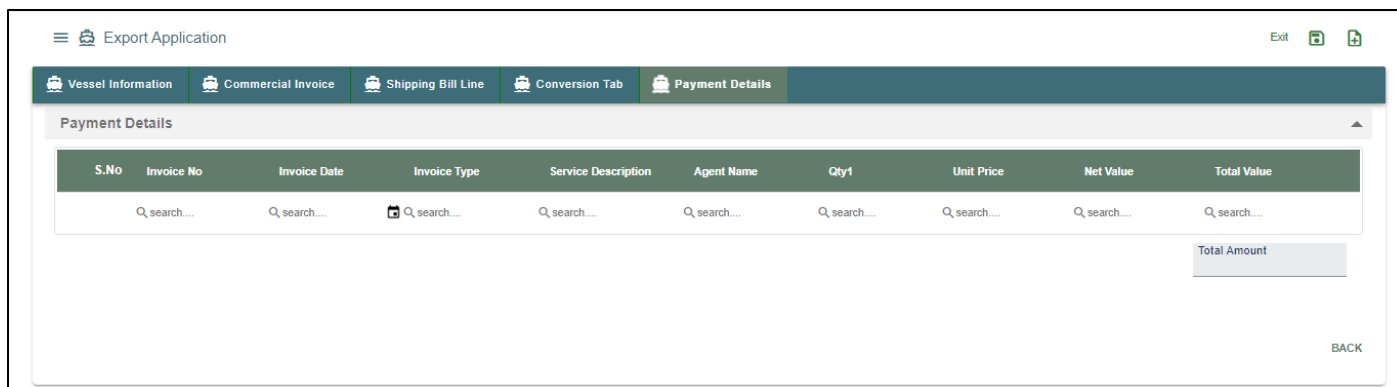
User Interface Image 81-Export Application shipping Bill Lines-14.5.2

Step 5: Once data is filled, click on save button and Payment details should be auto populated

User Interface Image 83-Payment Details-14.5.4

Field Name	Mandatory	Fill Type
UOM		Pop Up
Rate		Textbox
Total Before Discount		Textbox
Total After Discount		Textbox
IGST		Textbox
CGST		Textbox
SGST		Textbox
Grand Total		Textbox
Payment Status		
Payment Reference No.		
Charges Paid up to Date		

Adding the files manually once the record got saved, Click on the icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on Upload button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using icon system will display respective section name.

Attachments (1) ×

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☐ 1.	Custom Related Document	CUST DOC				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

If the Attachment's are configured, System will display like below when we click on [📎] icon.

Respective Form Name, Section name will display to attach the documents*File Required.

Attachments (2) ×

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☐ 1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐ 2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (2)   ×

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
			Shipping Bill				
☑	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☑	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

Once all the mandatory and required fields are filled then Click on Upload ⬆ button. System will display the status **File uploaded** on the screen.

Attachments (2)   ×

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
			Shipping Bill				
☑	1.	Custom Related Document	Transhipment Permit				*File Required
☐	2.	Cargo Related Documents	International Load Line Certificate				*File Required

+ Add files   Select files

or

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	Certificate Name	Clear
1.	Custom Related	Transhipmen ⬈	📅	📅	CHPT--CQA--SDO--BTT.png (224.39 kb)	🗑

Upload ⬆   Close ✕

Click On Close Button

Click on the Save button 🖫 from the top right corner to save the Form. Once the record got saved successfully, then the system will display ✓ **Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option X

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

i Send user Profile for Approval

i Change status of the record

Remarks:

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the [⊗] icon shown. After clicking the icon

system will display **Confirmation required** with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to

CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 86-Export Application-14.5.6

54. BUSINESS FUNCTION NAME: EXPORT GENERAL MANIFEST

54.1 DEFINITION

Export General Manifest (EGM) is a legal document mandatory to be filed by carrier of goods with customs department. This document is used by government authorities as proof of export. The customs officials certify proof of export on shipping documents to exporters on the basis of EGM. The Shipping Agent should file the Export General manifest within 8 days from the sailing of the vessel to the Customs.

EGM is filed in duplicate by the shipping agent to the Customs House and the duplicate copy is received by the commercial Documentation Office from the Customs House within 8 days from the sailing of the vessel. Steamer Agent will fill out goods details for Export in ICE Gate to get EGM. Upon getting the EGM, PCS will receives the information in EDI format and the same information will be retrieved to iPortman® through PCS

54.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⦙⦙⦙SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo→ Export Documentation → Export General Manifest → Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

54.3 PREREQUISITES – MASTERS

1. Agent
2. Port
3. Vessel Run
4. UOM
5. Shipper
6. Importer
7. Cargo

54.4 SCREENSHOT:

Following screenshot from Export General Manifest.

Step 1- Click on Add new button . Wewill redirect to screen like below.

User Interface Image 135-EGM Deatils-21.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Header Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Message Type	Mandatory	Dropdown
Custom House Code	Mandatory	Pop Up
Rotation No.	Mandatory	Pop Up
Rotation Date		
VCN No	Mandatory	Text Box
Vessel Name	Mandatory	Text Box
EGM No	Mandatory	Text Box
EGM Date	Mandatory	Date Picker
Gateway Port	Mandatory	Pop Up
Total Qty	Non Mandatory	Text Box
Unit Quantity Code	Non Mandatory	Text Box
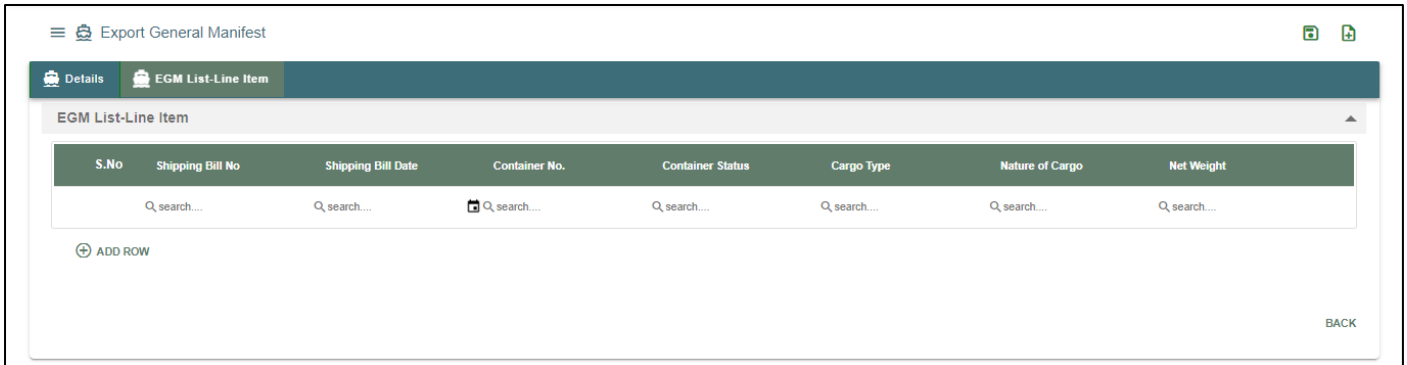
Total Line Item	Non Mandatory	Text Box
No. of Packages	Non Mandatory	Text Box

Step 3: Click button from Top Menu Bar to save EGM Details form record. Once it is saved Cargo Details will be activated to add Cargo details.
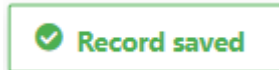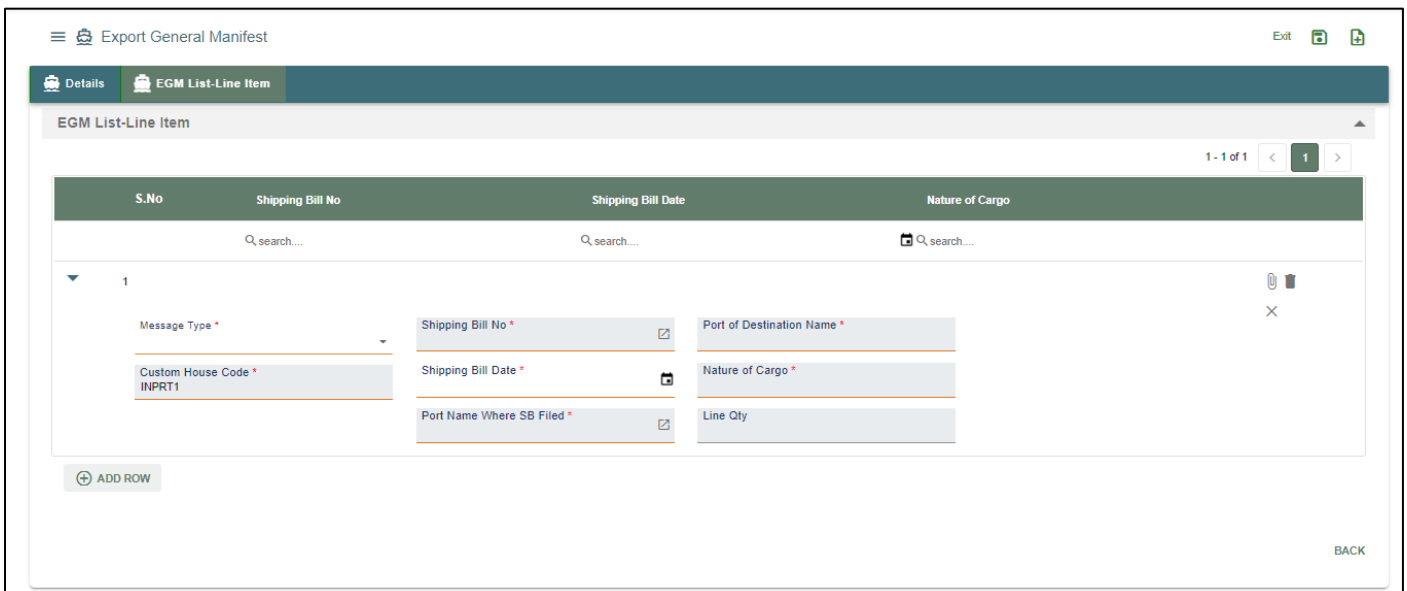
Step 4: Once EGM Details are saved, Cargo Details will be activated as below to add Cargo Details as shown in below screen.

User Interface Image 136-Cargo Details-21.5.2

Click on **Add Row** to begin with data entry

User Interface Image 137-Cargo Details-21.5.3

Below are the Field Information regarding EGM List Line item Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Message Type	Mandatory	Dropdown
Custom House Code	Mandatory	Pop Up
SB No	Mandatory	Pop Up
SB Date	Mandatory	Date Picker
Port Where Shipping Bill Filed	Mandatory	Pop Up
Port of Destination	Mandatory	Text Box
Nature of Cargo	Mandatory	Text Box
Line Quantity		
No. Of Packages		
Container No	Mandatory	Text Box
Container Status	Non Mandatory	Pop Up

Step 5: Once data is filled in Cargo Details, click on save button and click on ⊕ Add Row if need to add multiple

Row's or else click on button.

Adding the files manually once the record got saved, Click on the icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on Upload ⬆ button. System will display

File uploaded status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using icon system will display respective section name.

Attachments (1)   ✕

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☐ 1.	Custom Related Document	CUST DOC				*File Required

＋ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

If the Attachment's are configured, System will display like below when we click on [📎] icon.

Respective Form Name, Section name will display to attach the documents*File Required.

Attachments (2)   ✕

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☐ 1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐ 2.	Custom Related Document	Transhipment Permit				*File Required

＋ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display the status [File uploaded] on the screen.

Click On Close Button

Click on the Save button 💾 from the top right corner to save the Back to Town Form. Once the record got saved successfully,

then the system will display ✅ **Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option ✕

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval ✕

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[   ]

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

Successfully rejected.

If user reject the request following alert will display on the screen. And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on ⟨⟩ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval ✕

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

Approve   **Reject**

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon system will display **Confirmation required** with below alert ok and Back

Alert Message ✕

ⓘ Do you want to cancel?

NO   YES

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display [Ok] and status will change to CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 140-Export General Manifest -21.5.6

55. BUSINESS FUNCTION NAME: LET EXPORT ORDER

55.1 DEFINITION

Let Export Order is filed by the Exporter to the Customs. Let Export Order is received in iPortman® application through PCS.

The Exported goods before clearance to warehouse shipment or stuffing in containers are required to comply with prescribed Customs clearance formalities. Shipping Bill should be presented containing details such as description of goods, value, quantity, exemption notification, Customs Tariff Heading etc.

This Shipping Bill is verified by the proper officer of Customs. At the time of clearance of goods that these are examined by the Customs to confirm the nature of goods, valuation and other aspects of the declarations. In case no

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discrepancies are observed at the time of examination of goods 'Let Export Order' order is issued and thereafter the goods can be exported.

Let export order verification is done before release of cargo from exporter by the customs officers posted inside the terminal before the exit cargo from port terminal.

55.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⚏ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo→ Export Documentation → Let Export Order→ Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME

55.3 PREREQUISITES – MASTERS

1. Cargo

55.4 SCREENSHOT

Following screenshot from Let Export Order

Step 1- Click on Add new button 🔧 . Wewill redirect to screen like below.

User Interface Image 76-Let Export Order-13.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding LEO Header Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field	Mandatory	Fill Type
Message Type	Yes	" Drop Down"
Site Id	Yes	LOV
SB No	Yes	LOV
SB Date	Yes	Calendar
Rotation No.	Yes	LOV
Rotation Date	Yes	"Calendar
LEO Date	Yes	Calendar
Nature of Cargo	Yes	Text Box
Doc Numb		Text Box
Doc Series		List
Doc Date		Calendar
Doc Status		Text Box
Remarks		Text Box

Step 3: Click [icon] button from Top Menu Bar to save Let Export order form.

[Record saved]

Adding the files manually once the record got saved, Click on the [icon] icon. Then the user will be redirected to the popup window as below –

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Click on [+ Add files] button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload] button. System will display [File uploaded] status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [icon] icon system will display respective section name.

Attachments (1)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Custom Related Document	CUST DOC				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

If the Attachment's are configured, System will display like below when we click on 📎 icon.

Respective Form Name, Section name will display to attach the documents*File Required.

Attachments (2)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

Now Click on the Check boxes accordingly, then **Select files** button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on [Upload ⬆] button. System will display the status **File uploaded** on the screen.

Click On Close Button

Click on the Save button 🖫 from the top right corner to save the Form. Once the record got saved successfully, then the system will display ✔ **Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Step8: Once the workflow is initiated click on the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step9: Once the user Approve the request the following **Successfully Status changed to WFAPP** status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the icon shown. After clicking the icon system will display **Confirmation required** with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to

CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ≡ as Draft/Approved/Rejected/Cancel Status respectively

Doc No.	Status	Shipping Bill No	Shipping Bill Date	Rotation No.	Rotation Date	Nature of Cargo	Doc Approved Date	Data Source	Por
search...	search...	search...	search...	search...	search...	search...	search...	search...	sea
INMAA120220021	Approved	10155	18-04-2022	1992	18-04-2022	P	18-04-2022 18:14	POS	
INMAA120220020	Approved	34567	18-04-2022	122	16-04-2022	LB	18-04-2022 12:30	PORTAL	700
INMAA120220019	Approved	20054	14-04-2022	20054	14-04-2022	DB	14-04-2022 18:37	PORTAL	700
INMAA120220018	Approved	10585	12-04-2022	91234	12-04-2022	CP	12-04-2022 13:13	POS	
INMAA120220017	Approved	10584	12-04-2022	91234	12-04-2022	C	12-04-2022 12:36	POS	

User Interface Image 79-Let Export order List Data--13.5.4(a)

56. Business Function Name: Export Ready Application

56.1 Definition

Exporter / CHA submit Export application as a request to the port to collect advance Wharfage/other cargo related charges like levy/Carnage charges for the cargo Exported. Export Ready application can be submitted through online portal which further goes for validation and verification in iPortman® system.

56.2 Navigation

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⊞ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo→ Export Documentation → Export Ready Application → Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME
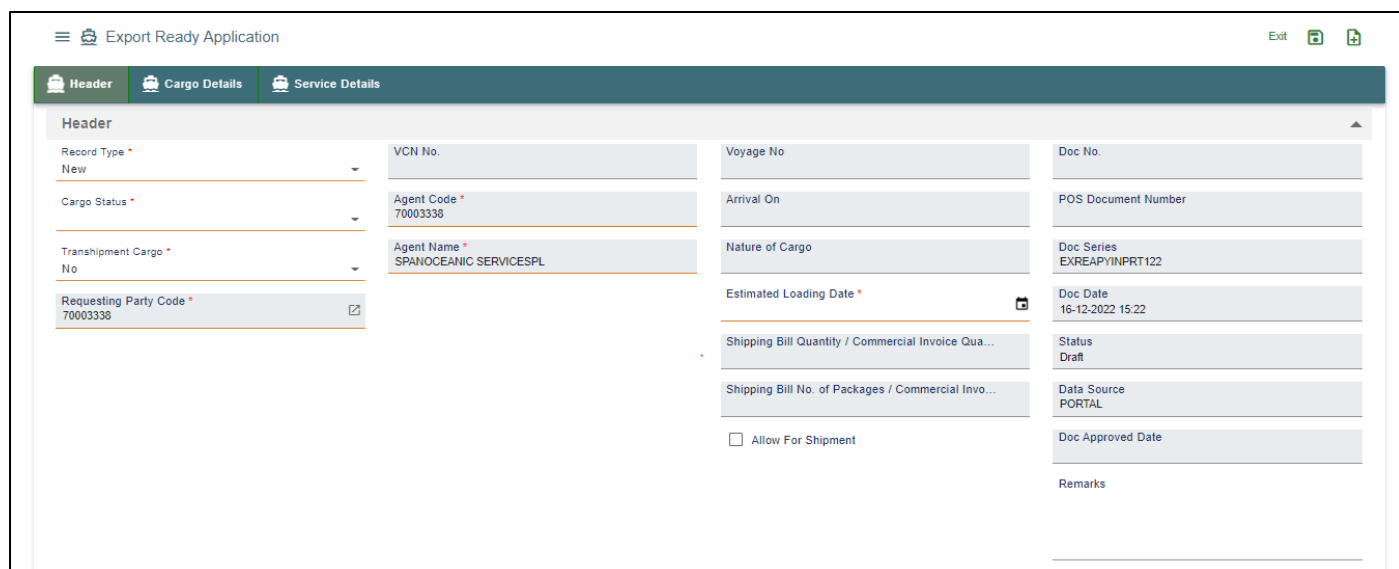
56.3 Prerequisites – Masters

1. Exporter
2. Agent
3. CHA
4. Cargo
5. Cargo Type
6. UOM

56.4 Screenshot

Following screenshot from Export Ready Application.

Step 1- Click on Add new button 🔲 . We will redirect to screen like below.

User Interface Image 80-Export Ready Application-14.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Header Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field	Mandatory	Fill Type
VCN No.	Mandatory	Pop Up
Rotation No.	Non Mandatory	Textbox
Vessel Name	Non Mandatory	Textbox
IMO Code	Non Mandatory	Textbox
IE Code*	Mandatory	Pop Up
Exporter Name	Non Mandatory	Textbox
Bill To Party Code	Non Mandatory	Textbox
Handling Agent	Non Mandatory	Pop up
CHA Name	Mandatory	Textbox
CHA Code	Mandatory	Textbox
Currency	Non Mandatory	Textbox

Step 3: Click Service line button from Top Menu Bar to save Export Application form record. Once it is saved Commercial Invoice tab will be activated to Cargo details and click on ADDROW button

Below are the Field Information regarding Cargo Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Service Code	Mandatory	Pop Up
Service Name	Non Mandatory	Textbox
Shipping Bill No*	Mandatory	Pop Up
Shipping Bill Date		
Check List No	Non Mandatory	Pop Up
Total Cargo Quantity(SB)	Non Mandatory	Textbox
Total No. of Packages (SB)	Non Mandatory	Textbox
CHA Code	Non Mandatory	
Mandatory"	Textbox	
Shipping Bill Item No*	Mandatory	Pop Up
Line No.		
GTI	Mandatory	Textbox
Sub-line no		
Line Quantity	Mandatory	Textbox
Total Cargo Quantity(SB)	Non Mandatory	Textbox
Total No. of Packages (SB)	Non Mandatory	Textbox
CHA Code	Non Mandatory	
Shipping Bill Item No* Line No.	Mandatory	Pop Up
GTI	Mandatory	Textbox
Sub-line no		
Line Quantity	Mandatory	Textbox
Commodity Code	Mandatory	Textbox
No. of Pkgs	Mandatory	Textbox
Type of cargo	Mandatory	Textbox
Approx. Receipt Quantity	Mandatory	Textbox
Approx. Receipt No. of Packages	Mandatory	Textbox
Cargo Gate in Date & Time	Non Mandatory	Date and Time picker

Last Free Date	Non Mandatory	Date picker
Expected date of shipment	Not Mandatory	Date picker
Mode of Receipt		Dropdown
Delivery Receipt Shed Location	Non-Mandatory	
Storage Allotment No.	Mandatory	
Cargo Location	Non-Mandatory	Love
Bill To Party Code	Non Mandatory	Textbox

Step 5: Once data is filled, click on save button and Service details should be auto populated

User Interface Image 83-Payment Details-14.5.4

Field Name	Mandatory	Fill Type
UOM		Pop Up
Rate		Textbox
Total Before Discount		Textbox
Total After Discount		Textbox
IGST		Textbox
CGST		Textbox
SGST		Textbox
Grand Total		Textbox
Payment Status		
Payment Reference No.		
Charges Paid up to Date		

Adding the files manually once the record got saved, Click on the 📎 icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload ⬆** button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using 📎 icon system will display respective section name.

Attachments (1) ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Custom Related Document	CUST DOC				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

If the Attachment's are configured, System will display like below when we click on [📎] icon.

Respective Form Name, Section name will display to attach the documents*File Required.

Attachments (2) ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ⬆   Close ✕

Now Click on the Check boxes accordingly, then [Select files] button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (2) ✕

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☑ 1.	Cargo Related Documents	International Load Line Certificate				*File Required
☑ 2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

Once all the mandatory and required fields are filled then Click on Upload ⬆ button. System will display the status **File uploaded** on the screen.

Attachments (2) ✕

8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill						
☑ 1.	Custom Related Document	Transhipment Permit				*File Required
☐ 2.	Cargo Related Documents	International Load Line Certificate				*File Required

+ Add files   Select files

or

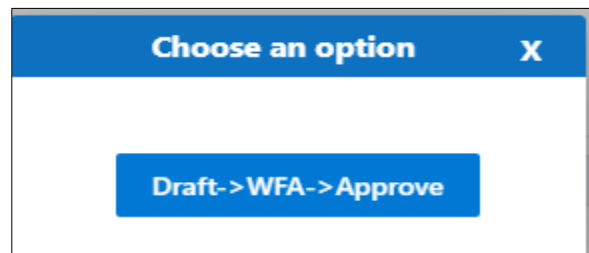| 8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	Certificate Name	Clear
1.	Custom Related	Transhipmen ⬈	📅	📅	CHPT--CQA--SDO--BTT.png (224.39 kb)	🗑

Upload ⬆   Close ✕

Click On Close Button

Click on the Save button 🖫 from the top right corner to save the Form. Once the record got saved successfully, then the system will display ✔ **Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button .
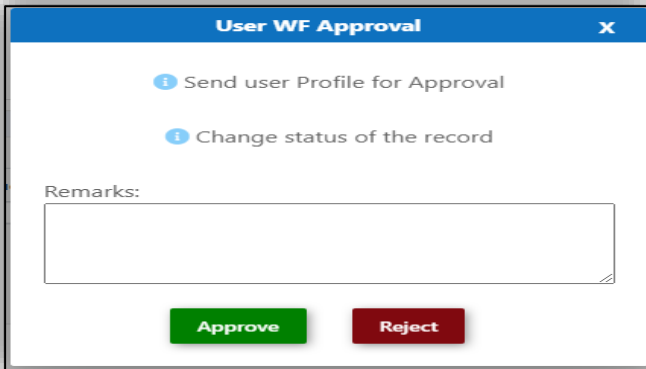
Choose an option ✕

Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval ✕

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[   ]

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.
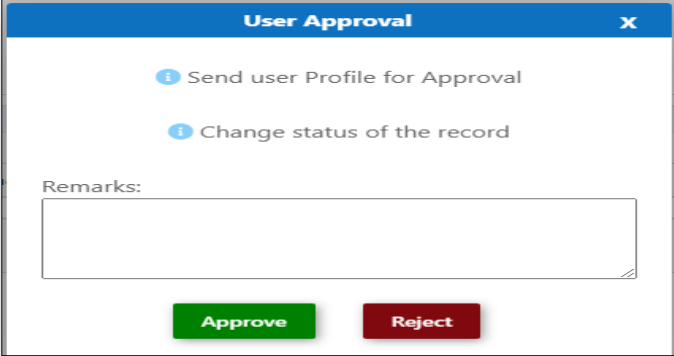
Step10: Once the workflow is in WFAPP. Click on the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the icon shown. After clicking the icon system will display **Confirmation required** with below alert ok and Back
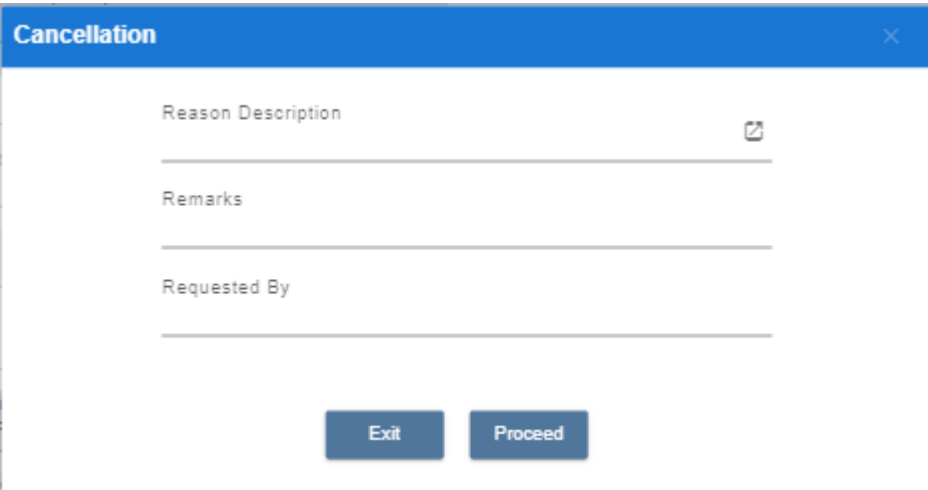
By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.
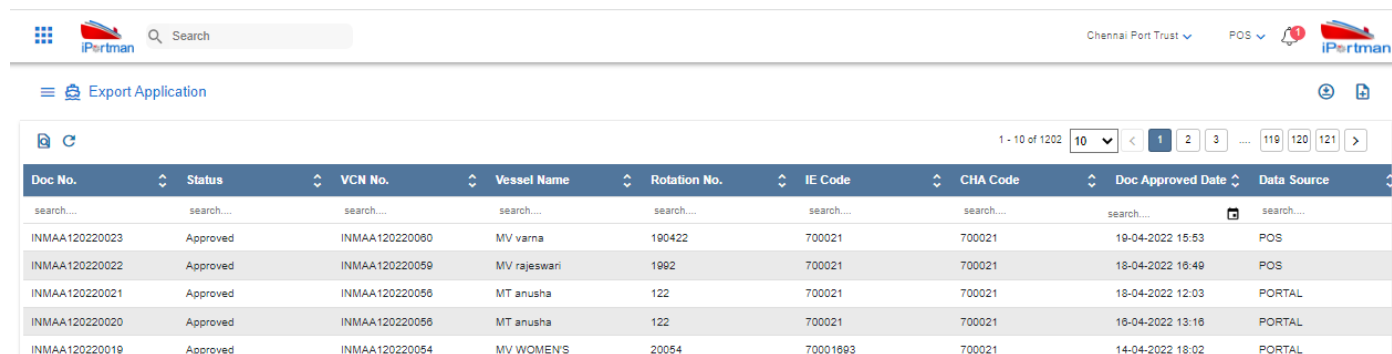
By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to

565

CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 86-Export Application-14.5.6

57. BUSINESS FUNCTION NAME: MATE RECEIPT

57.1 DEFINITION

Mate receipt is issued by the Master/Commanding Officer of ship once the cargo is loaded on the ship. It acts as a proof or evidence that cargo is loaded on the vessel. Vessel Agent will upload or enter Mates Receipt in iPortman® portal.

57.2 NAVIGATION:

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⚏ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo→ Export Documentation → Mate Receipt → Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME
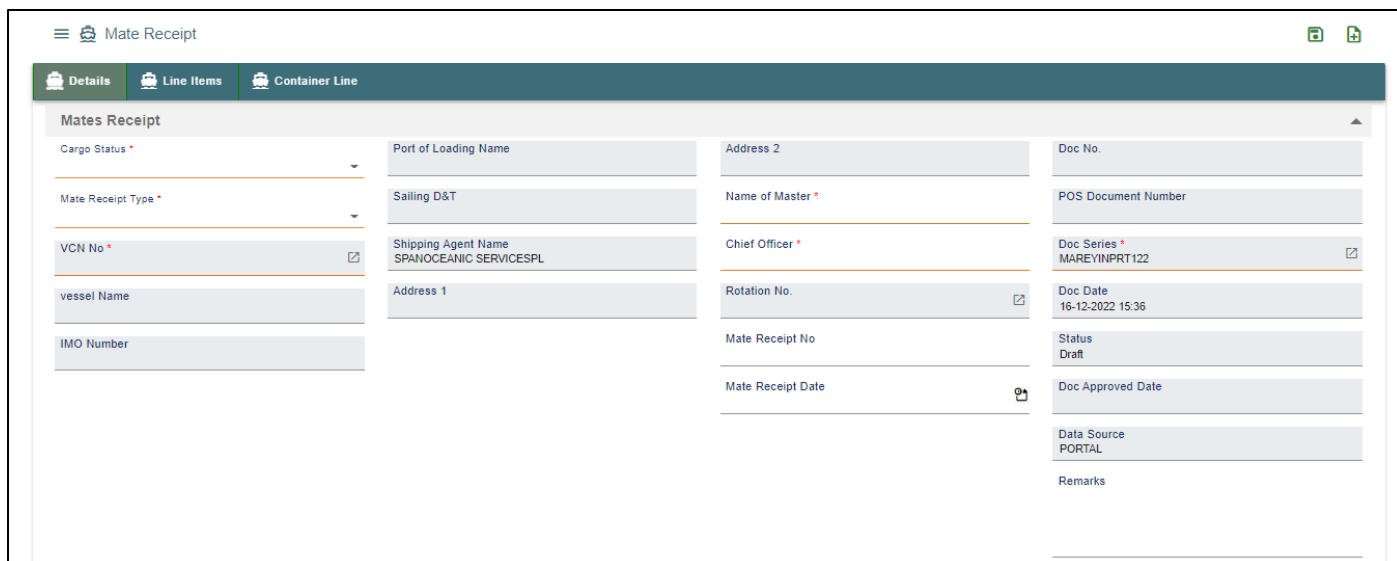
57.3 PREREQUISITES – MASTERS
1. Exporter
2. Port
3. Cargo
4. UOM
5. IMDG

57.4 SCREENSHOTS

Following screenshot Mate Receipt.

Step 1- Click on Add new button ⊞ . Wewill redirect to screen like below.

User Interface Image 127-Mate Receipt Deatils-20.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Header Details Section.

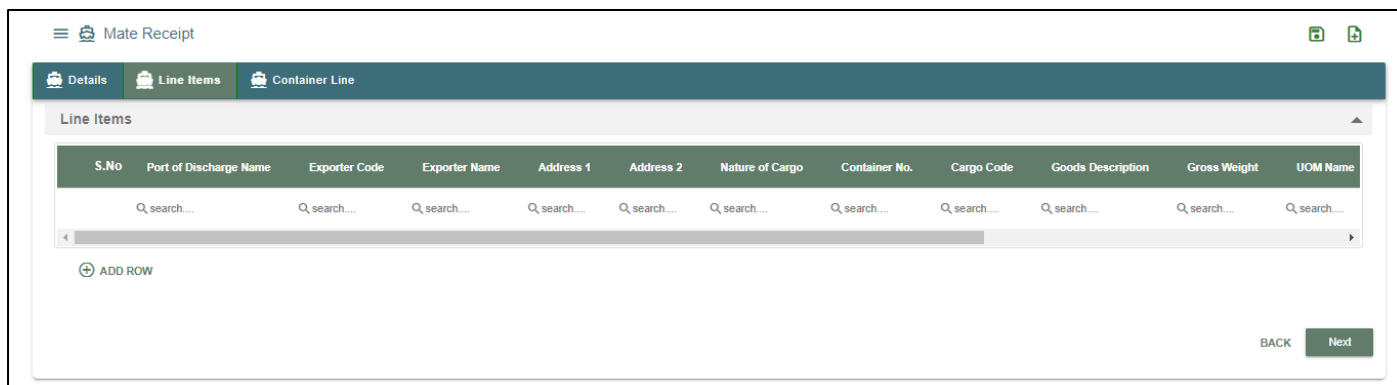(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Mate Receipt Type	Yes	Dropdown
VCN No.	Yes	Popup
Vessel Name	No	Textbox
IMO	No	Textbox
Port of Loading	No	Textbox
Date of sailing	No	Calendar
Shipping Agent	No	Textbox
Address 1	No	Textbox
Address 2	No	Textbox
Master name	Yes	Textbox
Chief Officer	Yes	Textbox
MR No.		Textbox
MR Date		Calendar
MR Series		Textbox
MR Status		Textbox
Approved By		Textbox
Remarks	No	Enabled when Status = Draft

Step 3: Click [icon] button from Top Menu Bar to save Mate Receipt Details form record. Once it is saved Line items will be activated to add Line items details.
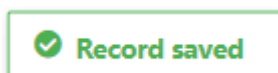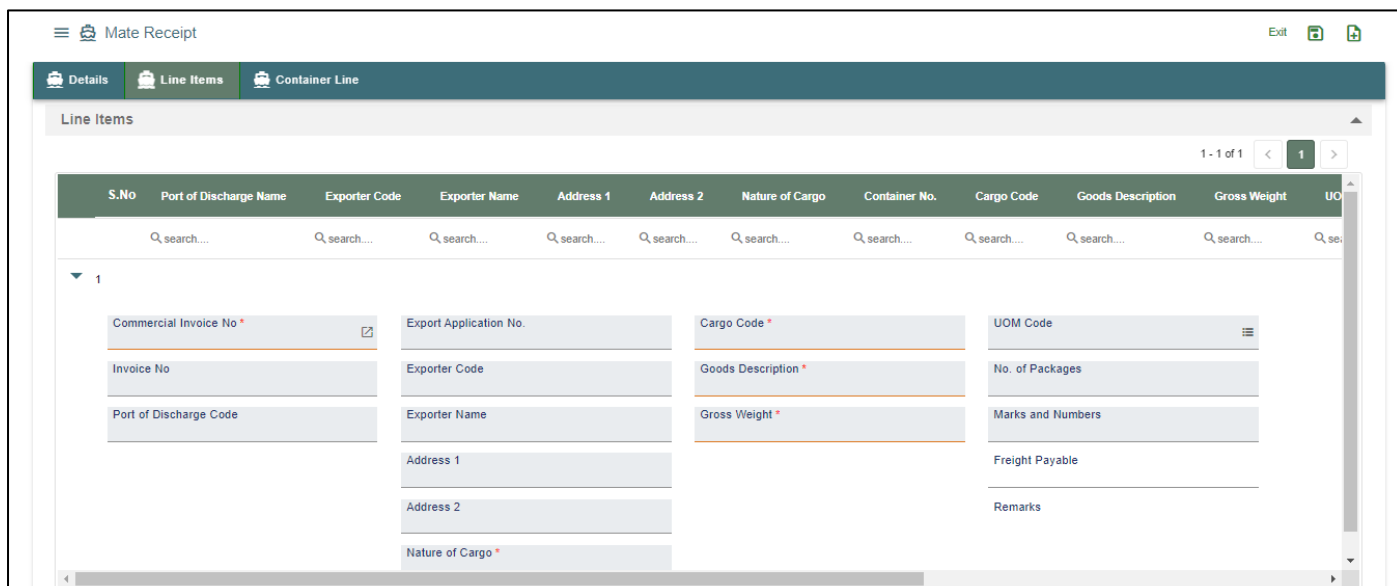

Step 4: Once Mate Receipt Details are saved, Line item Details will be activated as below to add Line item Details as shown in below screen.

User Interface Image 128-Line Item -20.5.2

Click on ⊕ Add Row to begin with data entry

User Interface Image 129-Line Item -20.5.3

Below are the Field Information regarding Line item Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)
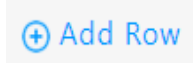
Field Name	Mandatory	Fill Type
Shipping Bill No.	Yes	Popup
Shipping Bill Date	Yes	Calendar
Shipping Bill Item No.	Yes	Textbox
Port of Discharge	Yes	Textbox
Exporter Code	Yes	Textbox
Exporter Name	Yes	Textbox
Address 1	No	Textbox
Address 2	No	Textbox
Nature of Cargo	Yes	Textbox
Container No	No	Textbox
Goods Description	Yes	Textbox
Gross Weight	Yes	Textbox
UOM	No	Dropdown

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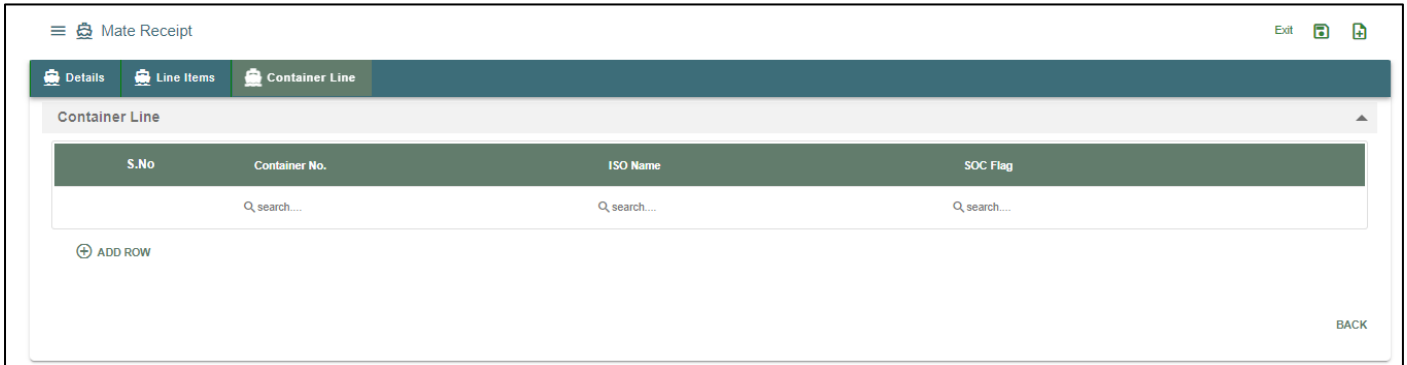
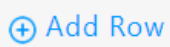| No.of Packages	Yes	Textbox
Marks & Numbers	Yes	Textbox
Freight Payable	Yes	Textbox
Remarks	No	Textbox

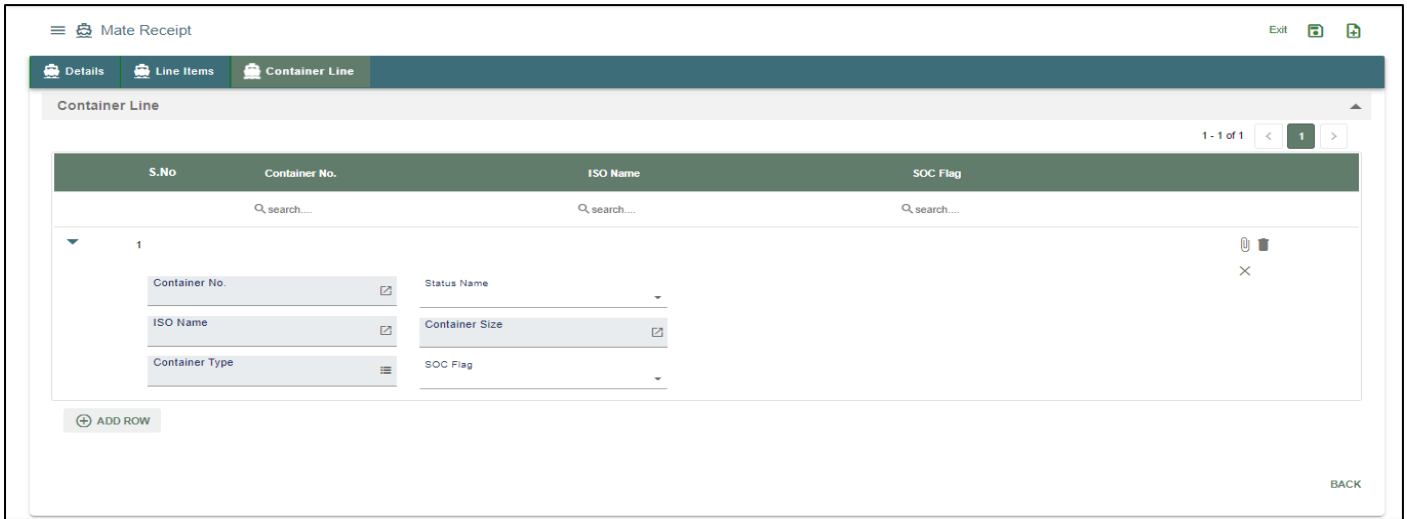**Step 5:** Once data is filled in Line items Details, click on save button and click on Add Row if need to add multiple Row's or else click on Container line item

User Interface Image 130-Line Item -20.5.4

Click on Add Row to begin with data entry

User Interface Image 131-Line Item -20.5.5

Adding the files manually once the record got saved, Click on the icon. Then the user will be redirected to the popup window as below –

Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload** button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using 📎 icon system will display respective section name.

If the Attachment's are configured, System will display like below when we click on 📎 icon.

Respective Form Name, Section name will display to attach the documents*File Required.

Attachments (2)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ↥   Close ✕

Now Click on the Check boxes accordingly, then   Select files   button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

Attachments (2)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☑	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☑	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   **Select files**

or

Drag files here, to upload

Upload ↥   Close ✕

Once all the mandatory and required fields are filled then Click on   Upload ↥   button. System will display

the status   **File uploaded**   on the screen.

Click On Close Button

Click on the Save button ![icon] from the top right corner to save the Form. Once the record got saved successfully, then the system will display **✓ Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◇ .

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

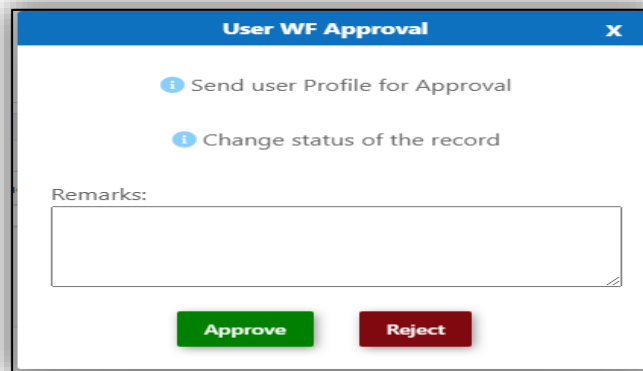Copy Right @ Envision Enterprise Solutions Pvt. Ltd.

Step8: Once the workflow is initiated click on ⬦ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[   ]

Approve   **Reject**

Step9: Once the user Approve the request the following **Successfully Status changed to WFAPP** status will be shown on the screen and the document status will be changed as 'WFAPP'. .

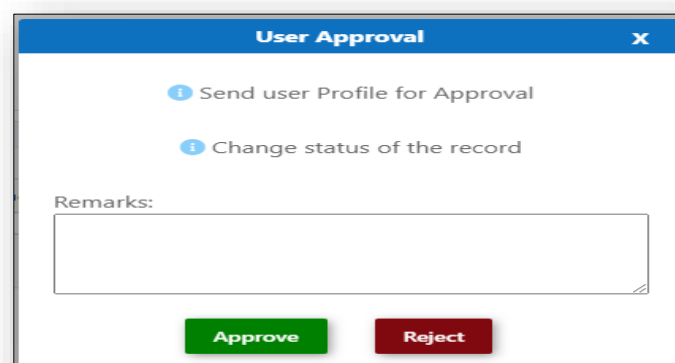If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step10: Once the workflow is in WFAPP. Click on ⬦ the icon. System will be displaying

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User Approval X

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[   ]

Approve   **Reject**

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

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Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon

system will display **Confirmation required** with below alert ok and Back

Alert Message ×

ⓘ Do you want to cancel?

NO   YES

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

Cancellation ×

Reason Description ☑

Remarks

Requested By

Exit   Proceed

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

Doc No.	Status	VCN No.	Name of Master	Doc Date	Doc Approved Date	Data Source	Portal Agent Code	Portal Agent Name
search....	search....	search....	search....	search....	search....	search....	search....	search....
INMAA120220008	Approved	INMAA120220056	asd	18-04-2022 16:03	18-04-2022 16:04	POS		
INMAA120220007	Approved	INMAA120220054	aa	14-04-2022 19:05	14-04-2022 19:05	PORTAL	700021	OCEAN PORT SERVICES PV
INMAA120220006	Approved	INMAA120220033	SHARMAN	08-04-2022 18:54	08-04-2022 18:54	PORTAL	700021	OCEAN PORT SERVICES PV
INMAA120220005	Approved	INMAA120220023	master	08-04-2022 17:31	08-04-2022 17:34	PORTAL	700021	OCEAN PORT SERVICES PV

User Interface Image 134-Mate Receipt -20.5.6

58. BUSINESS FUNCTION NAME: SHIPPING BILL CONVERSION

58.1 DEFINITION

58.2 NAVIGATION

FOLLOWING NAVIGATION PATH IS MENTIONED FROM MENU ⠿ SELECTION TO VIEW THE LIST ITEM AND ADD NEW RECORDS.

Menu Path	Menu Bar → Cargo→ Export Documentation → Shipping Bill Conversion → Click on **Add New**

USER CAN ALSO SEARCH THE FUNCTION IN SEARCH AREA 🔍 AVAILABLE IN THE HEADER SECTION LEFT SIDE WITH FUNCTION NAME
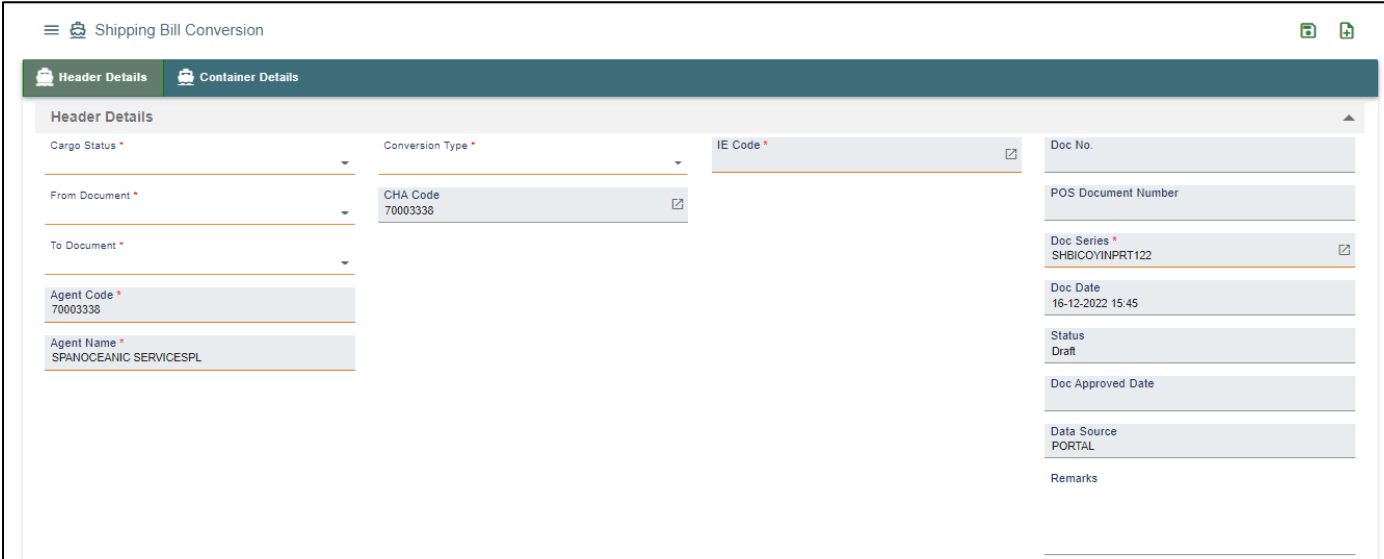
58.3 PREREQUISITES – MASTERS

1. Agent Master

58.4 SCREENSHOT

Following screenshot from Shipping Bill Conversion

Step 1- Click on Add new button 🔲 .Wewill redirect to screen like below.

User Interface Image 176 –Shipping Bill Conversion -28.5.1

Step 2:-Enter the data in all the fields, Mandatory fields are compulsory which have asterisk mark (*).Enter the valid data or information into the fields.

Below are the Field Information regarding Header Details Section.

(Note: - In Application form Only Red Color star Mark field are Mandatory to fill the Details)

Field Name	Mandatory	Fill Type
Cargo Status	Yes	Dropdown
From Document	Yes	Dropdown
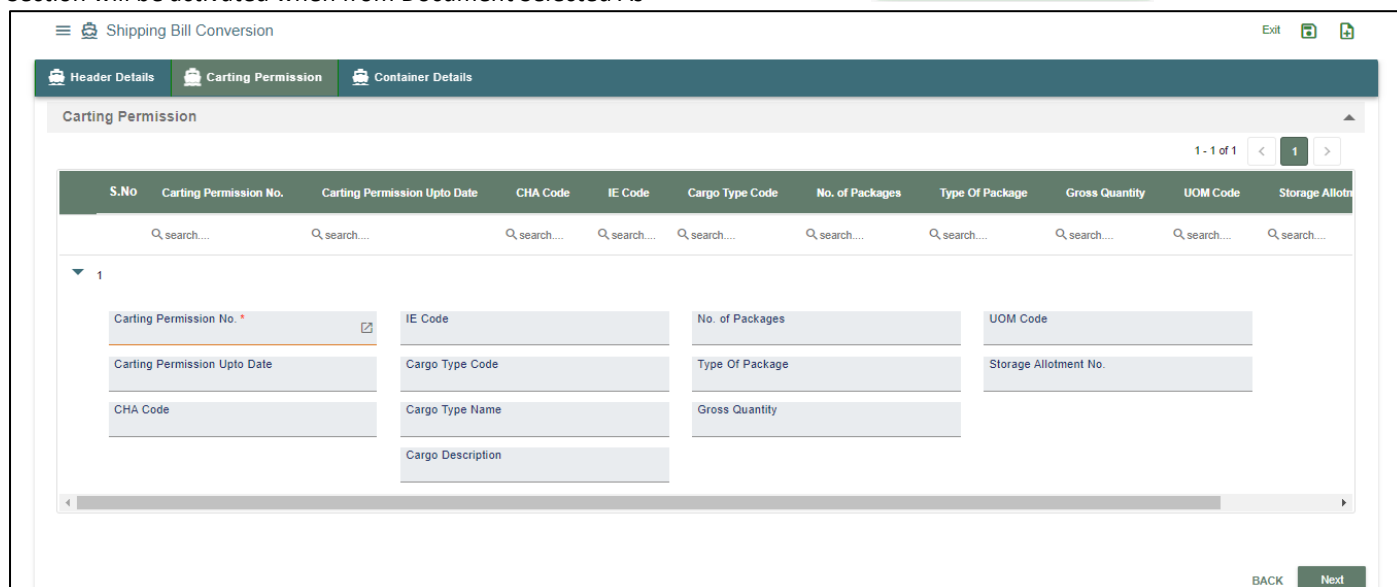
To Document	Yes	Dropdown
Conversion Type	Yes	Dropdown
CHA Code	No	Pop Up
IE Code	Yes	Pop up
Export Application No	Yes	Pop up
VCN No	Yes	Pop up
SBC Num		Text Box
Record No		List
Record Date		Calendar
SBC Status		Text Box
Approval Date		Calendar
Remarks		Text Box
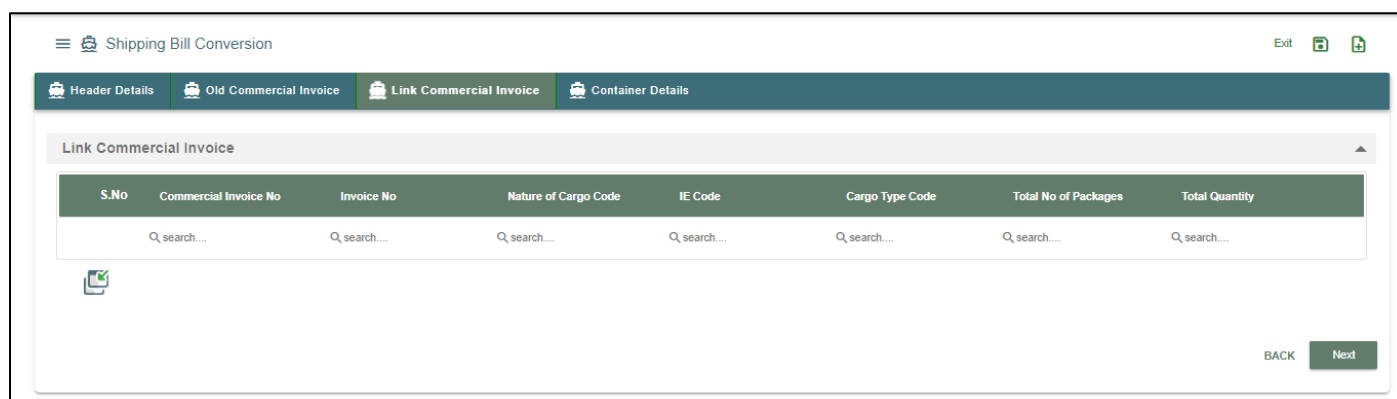
Step 3: Click ⬜ button from Top Menu Bar to save Shipping Bill Conversion form record. Once it is saved Carting Permission

Section will be activated when from Document Selected As ✅ Record saved
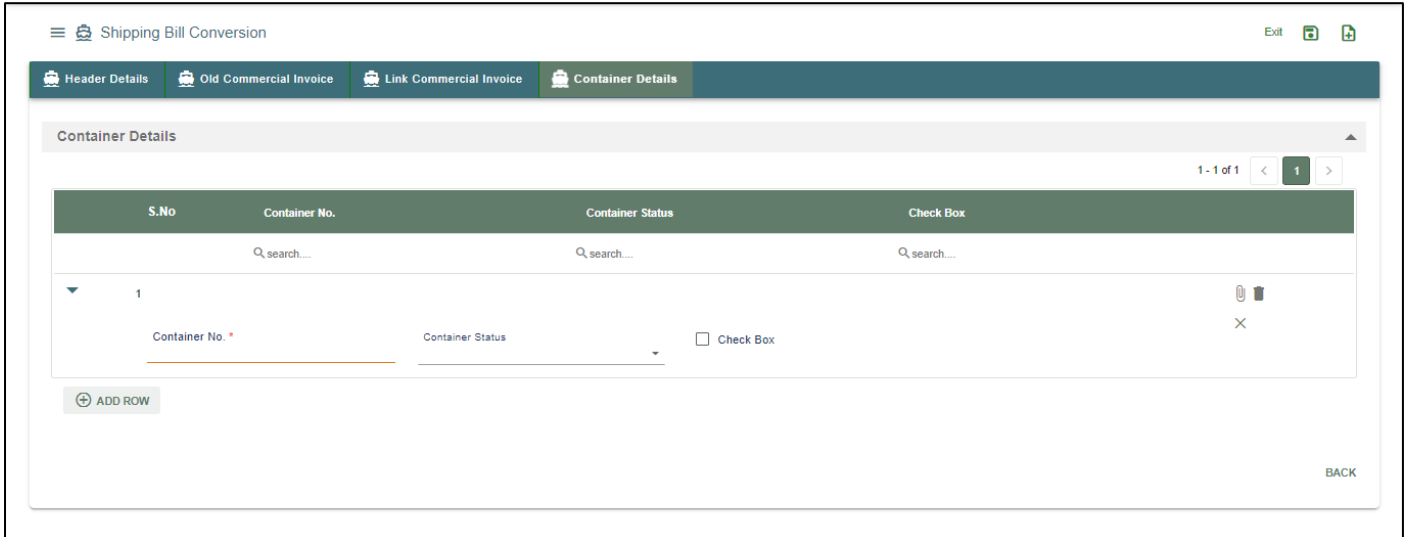
User Interface Image 177-Carting Permission-28.5.2

User Interface Image 178-Link Commercial Invoice-28.5.3

Step 5: Once data is filled details , click on save button [icon] and click on Next Button and will activated to ContainerDetails Section

Adding the files manually once the record got saved, Click on the [icon] icon. Then the user will be redirected to the popup window as below –

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Click on **+ Add files** button/ Drag Files here, to upload, Go to respective file location and click on it. File will be attached under file name with respective filename.extension.

Once all the mandatory and required fields are filled then Click on **Upload ⬆** button. System will display **File uploaded** status on the screen. Respective Form Name, Section name will display along with attached documents.

NOTE: If the attachments added in line level by using [icon] icon system will display respective section name.

Attachments (1)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Custom Related Document	CUST DOC				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

If the Attachment's are configured, System will display like below when we click on 📎 icon.

Respective Form Name, Section name will display to attach the documents*File Required.

Attachments (2)   ✕

	8No.	Attachment Type Name	Attachment Name	Valid From Date	Valid To Date	File Name	Clear
Shipping Bill							
☐	1.	Cargo Related Documents	International Load Line Certificate				*File Required
☐	2.	Custom Related Document	Transhipment Permit				*File Required

+ Add files   Select files

or

Drag files here, to upload

Upload ⬆   Close ✕

Now Click on the Check boxes accordingly, then Select files button will be enable.

Select respective files / Drag Files here, to upload, Go to respective file location and click on it.File will be attached under file name with respective filename.extension.

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Once all the mandatory and required fields are filled then Click on ⬆ Upload button. System will display the status **File uploaded** on the screen.

Click On Close Button

Click on the Save button ▣ from the top right corner to save the Back to Town Form. Once the record got saved successfully,

then the system will display **✔ Record saved** message.

Step 7: Once the record is saved then the document status will be as 'Draft' and then click on workflow button ◈ .

Choose an option ✕
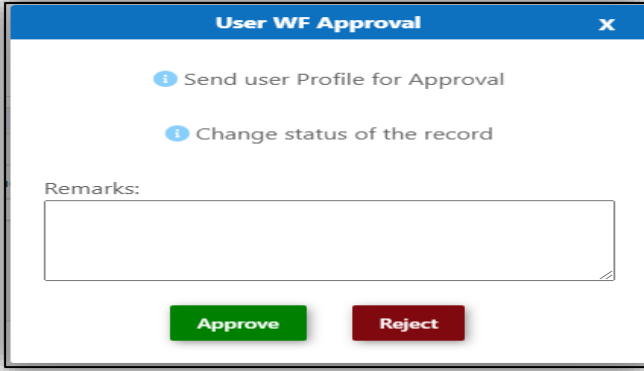
Draft->WFA->Approve

Choose an option from the popup .And now Work Flow will be initiated accordingly with id

Work Flow Initiated. with drivenId = 12999

Step8: Once the workflow is initiated click on ◈ the icon. System will be display

Send user Profile for Approval with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

User WF Approval ✕

ⓘ Send user Profile for Approval

ⓘ Change status of the record

Remarks:

[   ]

Approve   **Reject**

Successfully Status changed to WFAPP

Step9: Once the user Approve the request the following status will be shown on the screen and the document status will be changed as 'WFAPP'. .

If user reject the request following alert will display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.
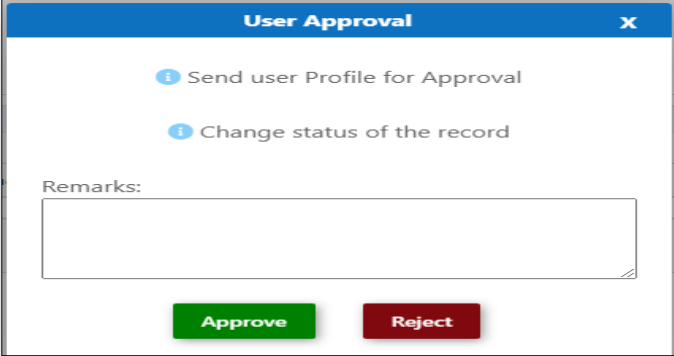
Step10: Once the workflow is in WFAPP. Click on ◈ the icon. System will be displaying

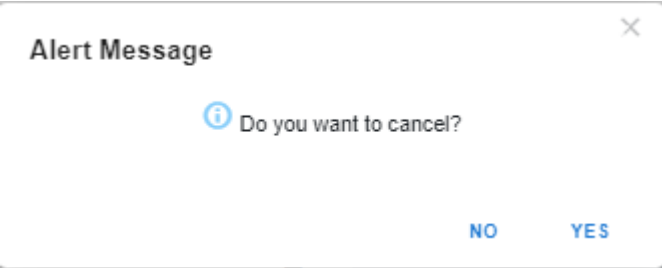**Send user Profile for Approval** with below popup fields and buttons. So the approver will either 'Approve' or 'Reject' with reason (Remarks).

Step11: Once the user Approve the request the **Successfully Status changed to APPROVED** following status will be shown on the screen and the document status will be changed as 'APPROVED'. If user reject the request following alert will

display on the screen. **Successfully rejected.** And the document status will be changed as 'REJECTED'.

Step 12: While if there is any changes or error we can cancel the record by clicking the ⊗ icon shown. After clicking the icon

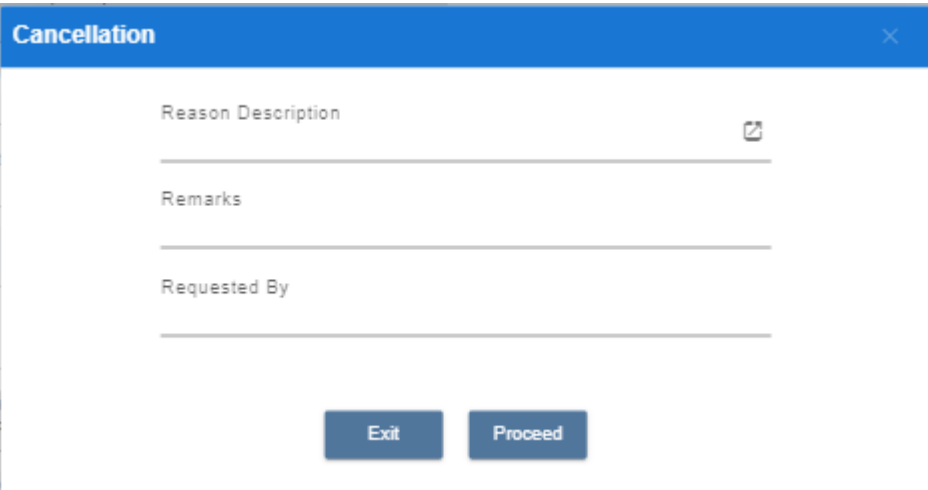system will display **Confirmation required** with below alert ok and Back

By Clicking on 'NO' we can go to the previous screen. By clicking 'YES' we can see the below fields in Alert.

By Clicking on Exit we can go to the previous screen. By clicking Proceed system will display **Ok** and status will change to

CANCEL

Upon Save / Approve /Reject /Cancel the record that can be seen in ☰ as Draft/Approved/Rejected/Cancel Status respectively

User Interface Image 181-List table -28.5.6