UNOLS Ship Time Request and Scheduling System (STRS)
Creating and Editing Projects and Ship Time Requests

Overview

⇒ Your contact information is based on your member contact information and does not need to be entered each time. It can (and should) be edited whenever changes are needed and those changes will automatically be appended to your Ship Time Request.

⇒ Ship Time Requests will consist of two components - Project information and related Ship Requests:

- **Project/Proposal information will be stored in a "Project" record**, which will include the funding agency information, proposal or project title, start and end dates, etc. You will create a new "Project" each time you submit a proposal or you have a new project or contract that requires ship time. If you need to resubmit a proposal, you will create a new Project and can easily do so by clicking on the "Duplicate" button when viewing a project. This will allow easy duplication and editing of the information, while at the same time allowing the new proposal to be tracked as a separate record.

- **Ship Request information will be added as separate records**, tied to a specific project. In general each ship request record will describe the requirements for one research cruise. The one exception is a request that is for very similar *repeating* cruises all in the same calendar year (repeating cruise request) such as might be used for a time series (e.g., BATS or HOTS). There is no limit to the number of ship requests tied to each project. If you need to perform the same type of work over the period of several years, you will simply duplicate the request and change the year and other information as needed. If you want to work with different types of ships, or more than one ship or in different locations, you will create separate requests for each cruise. Again, duplicating and modifying requests will make this a relatively simple process.

  - If your cruise will be a multi-ship operation, you can indicate that on the request and explain what other ships/requests are related to it.
  - If you need to re-submit a proposal, duplicating the project to create a new project can also duplicate all or a selection of the associated requests, which can then be edited as needed.

Creating a new Project

Use the following steps to create a completely new Project and Ship Request(s).

1. From your Principal Investigator's Home Page, click on "New Project" If you do not have a Principal Investigators Home Page you can use the "Customize Homepage" button at the top right of your screen (when you are logged into STRS) to create one (and call it whatever you want). A **project** is the overall description of your research project and a **request** is the actual cruise time you are requesting. You can have multiple ship time requests for a single project.

2. Enter information about your proposal or project. A red asterisk marks required fields for a "Draft" project. Orange asterisks denote required fields for "Submitted" projects. Projects and Requests need to be submitted to be publicly viewable.

⇒ The default PI is the "member" that creates the project, however, if you are a Co-PI, an administrative assistant or someone else creating a request on behalf of the PI, then click on "Select PI" and enter the actual PI from the database of members. (PI's, Co-PIs and anyone creating a project must be a "member" of the system). If the PI or Co-PI is not a member, you can create a "provisional member" with just a few pieces of information:

Entering PIs and Co-PIs from the member data table, allows us to display schedules with their projects on their home page and will allow us to better track conflicts between cruises for PI's and Co-PI's.

⇒ You can enter as many Co-PIs and other collaborators as needed by clicking on the "Select Co-PI's" button.

⇒ The Default Project Institution is the PI's primary institution. By clicking on Select Institution you can change this to a different institution if needed. This is recorded as a separate field in the record so that the project remains with the institution, even if the PI later changes institutions. If the project funding is moved to a new institution, then this field should be edited.

⇒ For NSF proposals or others that are submitted for a particular proposal deadline, we ask you to enter the date of the proposal deadline. This will allow us to keep better track of the status of requests as well as success ratios and utilization for different panels or programs.

⇒ We provide for the entry of two different funding agencies for projects that are funded by more than one agency. If there are more than two, this can be explained in the agency comments box. Choose the most specific agency/division/program that applies to your project (i.e., NSF/BIO/MCB for Molecular and Cellular Biosciences as opposed to just NSF/BIO). If you are not sure, then choose the best fit and program managers can edit this field if necessary. If the specific program is not available as a choice, enter the closest fit. (i.e. if your program is in NSF/BIO but not listed, then choose NSF/BIO and explain in agency description field.)

If an Agency or Large Program is missing, use the comments suggestions link to let us know.

⇒ There are fields to enter project web sites and to give a brief summary of fieldwork, facility requirements and to provide other requirements or comments. These three fields are a carryover from the old system and your comments may be combined in one summary of fieldwork and facility requirements if appropriate. These fields are to give a general sense of what the project will require for facility support of the fieldwork or to clarify aspects of the project, specific requirements will be covered in the ship request pages.

⇒ There are two ways to save your work. You can click on "Save Your Work" to save what you have done so far, which will save the project as a "draft" and continue working. Or you can "Save And Go To Next Step" depending on whether you are done or will finish at some later date. When you click on "Save And Go To Next Step", you will then be taken to the "STR Manager" page from which you can create the Ship Time Requests for this project. Your project will be given draft status and saved in the system until you click on the "Submit and Publish" button in the "STR Manager". This will give your project at status of "Submitted" as long as all of the required fields are filled in, and can be seen by schedulers in the system.

Last Saved: Not Yet Saved	Save Your Work	Save And Go To Next Step	Disregard Changes
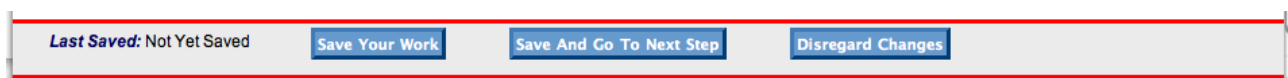
2a. Creating a new project by duplicating an old one.

⇒ To duplicate your Ship Time Request is done by viewing the project that you wish to duplicate and then click on the "Duplicate STR" button in the upper left corner. You will be taken to a new page where you can select the requests to duplicate and also copy read/write permissions that you can give to other member (these will be explained later on in this document).

3. Create Ship Requests for your project.

⇒ When you clicked "Save And Go To Next Step" you were redirected to the "STR Manager" page. This page includes a button for creating a new Request. If you made this project by duplicating a previous project, you may already have a list of requests. From here, you will either edit an existing request or use the "New Cruise Request" button.

You can also create a new request for a project from your Member Home Page. Click on the "Show Requests" link next to the project that you wish to add a request to. On the Right you will see the list of requests associated with that project if there are any. From here you would use the "New Request for this Project" link to start a new ship time request.

⇒ First you should choose the type of request (principal/primary, collaborative, ancillary, etc.) and then proceed down the page filling in the information that will describe your requirements for one cruise (or a repeating cruise).

⇒ Fill in information about dates, vessel needed, number of days, multi-shi ops, repeating cruises etc.

⇒ Describe where you need to work and whether or not you need clearances.

Work Area for Cruise

Short Description of Op Area for use in schedules: TESTAREA

Description of operations area:

Remaining Characters: 1000

Op Area Size/Dia. in nautical miles:

* - Beginning and Ending Lat/Long must be entered.

Lat/Long   Marsden Grid   Navy Op Area

Beginning [ ]° [N ▾] / [ ]° [W ▾] map
Ending
same as beginning [ ]° [N ▾] / [ ]° [W ▾] map

Show Degrees Minutes   Clear Beginning Areas   Clear Ending Areas

Foreign Clearance and Permits

Is a Foreign Clearance Required?
[Yes ▾]
⊙ Questions about Foreign Clearances?

Comments about foreign clearance requirements or description of any other special permitting requirements (e.g., MMPA, ESA, IHA, Marine Sanctuaries, etc.)

Select Coastal States   [Select Coastal States]

Remaining Characters: 1000

Ports

Requested Start Port   [Select Port]
Requested Intermediate Port   [Select Port]
Requested Intermediate Port 2 [Select Port]
Requested End Port   [Select Port]

Explanation/justification for requested ports and dates of intermediate stops or to list additional port stops.

Remaining Characters: 1000

Science Party

CHIEF SCIENTIST: Caitlin Mandel, URI_GSO [Select Different Chief Scientist] *

TOTAL SCIENCE PARTY SIZE:
[1] *

OF DIFFERENT SCIENCE TEAMS:
[1] *

OF OPERATOR PROVIDED TECHNICIANS NEEDED:
[1] *
(include this # in the science party size)

⇒ The following images show several choices for entering your location information. Lat/Long is required at minimum.

⇒ Describe how many people you will be bringing and how many technicians you will need (Note: numbers entered in this section need to be greater than or equal to 1).

⇒ Describe the type of instrumentation that might affect scheduling decisions and other vehicle facilities that you will need to use in conjunction with this particular cruise. Major Ancillary Facilities are defined as those that are operated as a separate facility and normally scheduled independently of the ship. If a facility or any instrumentation is not included among the check boxes, describe it in the appropriate text box. If you think it should be included in the check boxes, you can submit a comment/suggestion from the link at the top of the screen.

⇒ Save your work until you are done. When completely finished click "Save And Go To Next Step" to submit your project and request.

⇒ You will be taken back to the "STR Manager" page and your requests will now be listed at the bottom of the abbreviated project information. If you need to create another request you can either use the "New Cruise Request" button or you can duplicate the request you just finished by clicking on the duplicate link on the left side of the request year. If you are done with adding requests you will notice that you request is in "Draft" status (circled below). Remember, a draft request will not be visible to ship schedulers! If you uncheck the include cruise button, then the request will remain as a draft. If you wish to have this cruise request included with your STR then leave it checked. When done, click the "Submit and Publish STR" Button (upper left). If you are revising a request this button will become "Update and Publish STR". (Note: the Delete option is only available when requests are in Draft status. Once submitted you will only be able to withdraw requests. Also, the same applies to the entire Ship Time Request (project and request). Once an STR is submitted you will only be able to withdraw the STR. Until then, if the project and request are still in draft status you will be able to delete the entire STR.)

STR Manager

Step 3: Create, edit and/or withdraw cruise requests
Create new requests using "New Cruise Request" button at lower right or by duplicating existing requests
Step 4: Ensure you check "Include Cruise" for all cruises that you want to submit with this STR
Step 5: Click the "Submit & Publish STR" button when finished with changes

| Submit & Publish STR | Duplicate Entire STR | | | | | View STR | Edit Project Details |

ID: 100853
Short Title: new project
Title: new project
PI: ap mem, ANL
CO-PI(s):

Status: Draft
Version #: 0

Funding Agencies:

Agency/Division/Program	Grant or Project Number	Funding Status
ACOE	Not Specified	To Be Submitted

List of Ship, Aircraft and Facility Requests — New Cruise Request

	Year	Ship	Start Date (optimum)	Science Days	Action(s) On Submit	Current Status
View Edit Delete Duplicate	2009	Atlantic Explorer	Jan 01, 2009	1	☑ Include Cruise	*DRAFT*

Delete STR   Submit & Publish STR

⊟ **STR Permissions**
You can assign other members additional read/write permissions for this STR.

Add/Edit Permissions

Member	Institution	Access Type
ap mem2	WHOI	Read

Below is another view of the STR Manager for an STR that has multiple cruise requests. You can see the first cruise request has been kept as a Draft, and is also unchecked, so it will not be included when resubmitted. The second cruise request has been withdrawn. It can be re-included or kept in that state. The final two are both included cruise requests and will show up when ship schedulers look at your STR.

STR Manager

Step 3: Create, edit and/or withdraw cruise requests
Create new requests using "New Cruise Request" button at lower right or by duplicating existing requests
Step 4: Ensure you check "Include Cruise" for all cruises that you want to submit with this STR
Step 5: Click the "Update & Re-Submit STR" button when finished with changes

| Update & Re-Submit STR | Withdraw STR | Duplicate Entire STR | | | | View STR | Edit Project Details |

ID: 100853
Short Title: new project
Title: new project
PI: ap mem, ANL
CO-PI(s):

Status: Submitted
Version #: 2

Funding Agencies:

Agency/Division/Program	Grant or Project Number	Funding Status
ACOE	Not Specified	To Be Submitted

List of Ship, Aircraft and Facility Requests — New Cruise Request
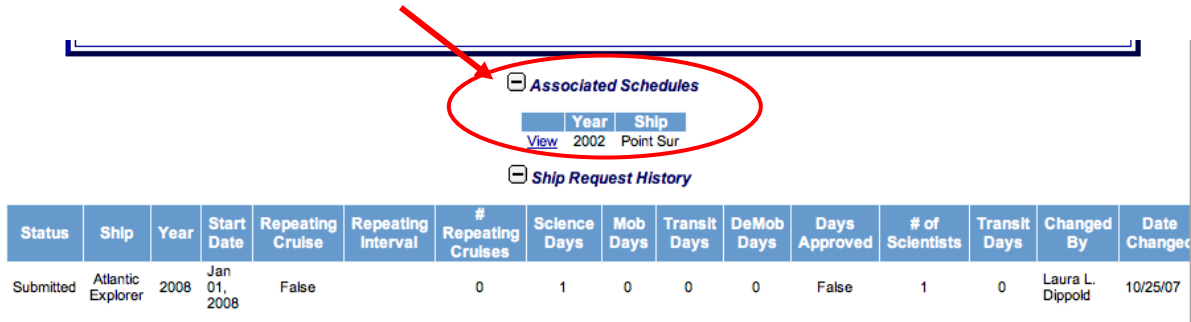
	Year	Ship	Start Date (optimum)	Science Days	Action(s) On Submit		Current Status
View Edit Delete Duplicate	2009	Atlantic Explorer	Jan 01, 2009	1	☐ Include Cruise		*DRAFT*
View Edit Duplicate	2009	Atlantic Explorer	Jan 01, 2009	1	○ Include Cruise	◉ Keep Withdrawn	*WITHDRAWN*
View Edit Duplicate	2009	Atlantic Explorer	Jan 01, 2009	1	◉ Include Cruise	○ Withdraw Cruise	Submitted
View Edit Duplicate	2009	Atlantic Explorer	Jan 01, 2009	1	◉ Include Cruise	○ Withdraw Cruise	Submitted

Update & Re-Submit STR

⇒ From the STR Manager Page you can set any extra permissions for your STR. This means that if you would like to share your request with other members of the UNOLS STRS system. Expand this section and use the "Add/Edit Permissions" button. On the new screen you will be able to search members of the system and give them read or read and write permissions for your request. Read permissions are automatically given to your Co-PI's for your request. You can change their permissions to "Write" in this section if you wish to have them help edit for STR.

⇒ Once updated and published, you will be able to view your project and associated requests in one document. A copy will also be sent to you via email, as well as distributed to ship schedulers depending on the STR's status.

	Year	Ship	Total Days	Cost Estimate	Start Date (optimum)	Repeat	Multi-ship	Area	Clearance	Status
View	2031	Thomas G. Thompson	3	$89,619	Jan 26, 2031	No	No		No	Submitted
View		None Selected				No	No		No	Draft

⇒ On the "Ship Request" overview page you can also view a history of changes to key elements of the project or you can assign read and/or write privileges to the project. Below the project information use the "plus" symbol to expand the history. This is also true at the bottom of your individual requests. You can also view any schedules that are associated with your request, as seen below.

⊟ **Associated Schedules**

	Year	Ship
View	2002	Point Sur

⊟ **Ship Request History**

Status	Ship	Year	Start Date	Repeating Cruise	Repeating Interval	# Repeating Cruises	Science Days	Mob Days	Transit Days	DeMob Days	Days Approved	# of Scientists	Transit Days	Changed By	Date Changed
Submitted	Atlantic Explorer	2008	Jan 01, 2008	False		0	1	0	0	0	False	1	0	Laura L. Dippold	10/25/07

⇒ Also on the "Ship Time Request Overview" page you can save your ship time request as a .pdf that can be uploaded to NSF's Fastlane.

```
--------------------------------------------------------
       UNOLS Ship Time Request Form - Section ONE - Project Information
--------------------------------------------------------
Project Title: Submitted-Funded
Project Short Title: Submitted-Funded          Project Status: Submitted
UNOLS Project ID #:  100783                    Version #:        5
Last Modified:        10/25/2007 2:55:00 PM    Date Submitted: 10/25/2007
Project Created By:  Laura L. Dippold
--------------------------------------------------------
P.I. Name: ap mem                              Institution: ANL
Phone: (888) 888-8888                          Fax:
Email: apmem@test.test
--------------------------------------------------------
Institution: MLML - Moss Landing Marine Laboratories
Address: 8272 Moss Landing Road
Moss Landing, CA 95039 USA
--------------------------------------------------------
Co P.I. Name        Institution     Phone        Email
Laura L. Dippold    MLML            (831) 771-4411 ldippold@mlml.calstate.edu
--------------------------------------------------------
Science Discipline: Other           Large Program Abbr: Other
If Other Science Discipline, specify:  test
Large Program Comments:  test
--------------------------------------------------------
Project Status: New Proposal
Agency/Division/Program    Grant/Project Number    Agency Funding Status
ACOE//                                             Funded
--------------------------------------------------------
Institutional Proposal #:
Proposal Deadline submitted for:
Project Start Date:         1/1/2008    End Date: 12/12/2008
Project Budget:             $0
--------------------------------------------------------
     Ship(s) Requested    Total              Repeat/Multi-ship/
Year (Name or Size)    Days Req.  Start Date  Clearance Req./Estimated Cost
2008 Atlantic Explorer  1         1/1/2008    No/No/No/$15192
--------------------------------------------------------
Project Webpage:
Summary of Field Work:
Summary of Facility Requirements:
Summary of Other Requirements or Comments:
--------------------------------------------------------
<------------------------------- Page Break ------------------------------->
```

```
--------------------------------------------------------
       UNOLS Ship Time Request Form - Ship Request #1 Information
--------------------------------------------------------
Project Short Title: Submitted-Funded          UNOLS Project ID #:  100783
PI Name:             ap mem                     Version #:              5
Last Modified:       10/25/2007 2:55:00 PM      Date Submitted: 10/25/2007
Institution:         MLML - Moss Landing Marine Laboratories
Funding Agencies:    ACOE
--------------------------------------------------------
UNOLS Request ID #:  1000890                    Last Modified: 10/25/2007
Request Type:        Ancillary                  Date Submitted: 1/1/1900
Submitted By:        Laura L. Dippold
--------------------------------------------------------
Year  Ship/Facility      Optimum Start   Earliest Start  Latest Start
2008  Atlantic Explorer   1/1/2008
Dates To Avoid:
--------------------------------------------------------
                   Science Days  Mob Days  DeMob Days  Transit Days (Est)  Total
Op Days Needed          1           0          0           0                1
--------------------------------------------------------
Multi-Ship OP?    No    Description:
Repeating Cruise? No    # of Cruises: 0    Interval:
Repeating Description:
Schedule Justification:
--------------------------------------------------------
                        Lat/Long        Marsden Grid       Navy Op Area
Beginning:                                                  AN01
Ending:                                                     AN01
Op Area Summary:
Op Area Size:
Op Area Details:
--------------------------------------------------------
Foreign Clearance Required: No
Coastal States:
Foreign Clearance Comments:
--------------------------------------------------------
Start Port:        None
Intermediate Ports: None
End Port:          None
Port Explanation:
--------------------------------------------------------
Chief Scientist: ap director
# in Science Party: 1      # of Science Teams: 1      # of Marine Techs: 1
Science Party Explanation:
--------------------------------------------------------
Instrumentation that affects scheduling
Instrumentation Explanation:
--------------------------------------------------------
Major Ancillary Facilities
Ancillary Facilities Explanation:
--------------------------------------------------------
```

⇒ When one of your requests has been scheduled you will see the schedule listed on your Member Home Page.

Schedules

	Year	Ship
View	2002	Point Sur

Page Size: (Unlimited)

4. If you need to make changes to your STR do the following:

⇒ Log into the system to view your Member Home Page (e.g. your Principle Investigator tab).

⇒ Click on the "View" link for the project or use the "Show Requests" link and click on "View" for the request to edit them.

⇒ Click on Edit button in the upper right corner of the Project or Request.

⇒ Make changes and save.

⇒ If you would like to have an email sent use the "Update and Re-Publish STR" button. Otherwise changes will be saved in the system without sending an email.