CLIENT ONBOARDING GUIDE

Information and access required before KBA Vanguard begins portal setup

Purpose
This guide lists the current information, access and confirmations required from the client so KBA Vanguard can configure the company portal, import operational data, activate compliance tracking and prepare enabled modules for production use.

CLIENT PROVIDES	KBA VANGUARD CONFIGURES
Shared Drive access, company and vessel details, crew data, certificate rules, users and roles, company settings, and any enabled payroll/travel/rotation policies.	Company workbooks and folders, crew and fleet records, compliance tracking, document processing, rotation workflow, travel/payroll structures, reports, backups, archives and portal access.

Prepared for client onboarding and portal implementation

Required Client Information

The items below establish the company workspace, security boundary and fleet structure.

1 Google Shared Drive Access

The client must provide one dedicated folder inside the company's Google Shared Drive.

✓ Share the folder with the KBA Vanguard portal service-account email.

✓ Grant the service account **Content Manager** access.

✓ Confirm that the service account can create, update, move and store files inside the folder.

✓ Provide the folder link to KBA Vanguard.

2 Company Administration Details

Provide the information used to create and administer the company portal.

✓ Legal company name and operating time zone.

✓ Primary Company Administrator / Crewing Manager full name and work email.

✓ Authorized onboarding contact who will review and approve imported data.

✓ Company logo file (PNG, JPG or WebP) for portal branding, if required.

✓ Primary operational contact for onboarding questions and activation approval.

3 Fleet and Vessel Information

Provide the fleet master information used by Fleet Register, crew assignments, certificates, rotations and reports.

✓ Complete list of current vessels and any planned vessels that must appear in the portal.

✓ Vessel names written exactly as the client wants them displayed.

✓ For each vessel: IMO number, vessel type, flag, crew capacity and operational status.

✓ Where available: owner, captain, superintendent, chief engineer, home port and current assignment / trading area.

✓ Any vessel notes or operational references needed by the crewing team.

Crew and Operational Data

4. Crew Master Data

Provide one complete and up-to-date crew list. The current portal uses these fields across Crew Management, Rotation, Travel, Payroll, Fleet and Reports.

Data Group	Information Required
Identity & Assignment	Crew ID (if available), Crew Name, Rank, Nationality, Responsible Manager, Current Vessel, Planned Vessel, Rotation Cycle
Planned & Actual Dates	Joining Date, Actual Joining Date, Sign-Off Date, Actual Sign-Off Date
Contact Details	Work / personal email address used operationally, phone number
Travel & Project	Home Destination, Joining Port, Project Location
Status & Notes	Current Crew Status, Notes and any operational instructions

Approved Portal Statuses
Onboard | Planned | Standby | Signed Off | Inactive

Important date requirement

Planned dates support forward planning. Actual Joining Date and Actual Sign-Off Date are used for completed service history and payroll calculations. Where historical actual dates are available, include them in the initial data import.

5. Vessel Manning Baseline

For each active vessel, confirm the expected manning structure or required positions by rank. This allows Vanguard to compare assigned crew against vessel capacity and identify manning gaps during rotation planning.

Certificate and Compliance Setup

6. Crew and Vessel Certificate Information

Provide the compliance information needed to configure crew certificates, vessel certificates, document expiry tracking and AI-assisted document processing.

Compliance Area	Information Required
Crew Certificate Types	Complete list of crew certificate types monitored by the company, including existing expiry dates where available.
Vessel Certificate Types	Complete list of vessel certificate types required for the fleet and existing expiry dates where available.
Requirement Rules	Identify mandatory / non-mandatory items and any rank-specific, vessel-specific, flag-specific or company-specific requirements.
Document History	Provide existing certificate files or accessible folders when documents are to be migrated into Vanguard storage.
Company Warning Windows	Confirm early-warning, renewal-planning and urgent expiry thresholds. Vanguard can also use a deployment review window for future joining/travel document checks.

Compliance configuration note
Certificate requirements should be agreed before activation. Vanguard uses the configured rules and warning windows to calculate readiness and alerts; it does not determine immigration or flag-state legal requirements on the client's behalf.

Recommended submission

- ✓ Certificate type list in spreadsheet form.
- ✓ Crew certificate expiry data matched to Crew ID / Crew Name.
- ✓ Vessel certificate expiry data matched to Vessel ID / Vessel Name.
- ✓ Requirement matrix showing which certificates apply by rank, vessel and flag where applicable.
- ✓ The company's preferred warning-day thresholds.

Users and Company Configuration

7 Portal User List

Provide the access list for all users who will use the portal.

✓ Full name and work email address.

✓ Required portal role: **Crewing Manager**, **Crewing Officer** or **Read Only**.

✓ Active or inactive status.

✓ Nominate at least one Crewing Manager / company administrator for company-level configuration and approvals.

✓ Confirm which users will perform crew edits, certificate review, rotations, travel, payroll review, vessel transfers, reports and company settings.

8. Company Settings Data

Provide the company-specific lists used in Crew Management, Fleet Register and operational workflows.

Company Setting	Information Required
Responsible Managers	Names and any internal role or department reference
Crew Ranks	Approved rank names used by the company
Project Locations	Projects, bases or operational locations
Home Destinations	Standard home cities, airports or travel destinations
Joining Ports	Ports / destinations used when crew join vessels
Nationalities	Nationality values used in crew records
Vessel Types	Vessel type values used in Fleet Register
Rotation Cycles	Approved cycles such as 28/28, 30/30 or 60/30

For each configurable value, include the display name, any internal code or secondary reference, whether it should be active, and preferred display order where relevant.

Workflow, Travel and Payroll Configuration

The following items are required only when the corresponding module is enabled for the client package.

9 Crew Rotation Workflow

Confirm how the company wants crew-change planning and completion controlled.

✓ Planning, assignment, email and ready-for-change timing windows.

✓ Default overlap days and whether same-day or negative-overlap changes are permitted.

✓ Whether crew-change email is required before completion.

✓ Whether actual joining / sign-off dates, completion remarks or manager approval are mandatory.

✓ Whether recent actions may be undone and the permitted undo windows.

10 Travel Management

Confirm the operating process used for joining and sign-off journeys.

✓ Who may create travel requests and who approves them.

✓ Preferred travel coordinators / booking contacts, if applicable.

✓ Any standard accommodation or journey-note requirements.

✓ Any company policy for recording disruptions, changes, travel legs and completion.

11 Crew Payroll

Provide the permanent payroll setup needed before monthly payroll is calculated.

✓ Default payroll currency / currencies and monthly payroll period convention.

✓ Salary templates or wage scales, including pay basis and basic wage.

✓ Fixed overtime, leave pay, bonus, vessel allowance and other fixed allowance rules where used.

✓ Crew Payment Profiles, including salary effective dates and individual adjustments where applicable.

✓ Payment / bank profile details required by the client's payment process, and any standing allotments or deductions.

✓ Payroll approval responsibility and any special review requirements.

Data Review and Activation

12 Data Review and Approval

Before production activation, the client must review and approve the configured information.

- ✓ Review imported crew records, including planned and actual service dates.
- ✓ Confirm vessel records, statuses, capacities and current / planned crew assignments.
- ✓ Confirm crew and vessel certificate types, expiry information and compliance rules.
- ✓ Confirm portal users, roles and access status.
- ✓ Approve company dropdown settings and rotation cycles.
- ✓ Approve enabled rotation, travel and payroll policies where applicable.
- ✓ Provide final written authorization for portal activation.

What KBA Vanguard Will Configure

After the required client information is received and verified, KBA Vanguard will prepare the company workspace and enabled modules.

✓ Company crewing workbook	✓ AI document-processing records
✓ Company communication / automation records	✓ Task Evidence and operational storage
✓ Crew Master and company configuration	✓ Reports, audit and operational logs
✓ Crew and vessel certificate tracking	✓ Daily / monthly backup and archive structure
✓ Fleet Register and vessel manning setup	✓ Portal user access and role mapping
✓ Rotation workflow configuration	✓ Travel / payroll structures where enabled
✓ Crew / vessel document folders	✓ Company branding and package access

Final Client Submission Checklist

1	Google Shared Drive folder with Content Manager access.	Received: [ ]
2	Company legal name, time zone, primary administrator / Crewing Manager and onboarding contact.	Received: [ ]
3	Complete vessel list with IMO, type, flag, capacity, status and available management details.	Received: [ ]
4	Complete and up-to-date Crew Master data, including rotation cycles and available actual service dates.	Received: [ ]
5	Crew and vessel certificate type lists and existing expiry information.	Received: [ ]
6	Certificate requirement rules and company warning-window preferences.	Received: [ ]
7	Portal user list with roles and active / inactive status.	Received: [ ]
8	Company Settings values: managers, ranks, project locations, home destinations, joining ports, nationalities, vessel types and rotation cycles.	Received: [ ]
9	Vessel manning / required-position baseline for active vessels.	Received: [ ]
10	Rotation workflow policy confirmation (if enabled).	Received: [ ]
11	Travel operating / approval process confirmation (if enabled).	Received: [ ]
12	Payroll salary templates, payment profiles and approval rules (if enabled).	Received: [ ]
13	Final review and written approval of imported and configured data.	Received: [ ]

Activation gate
KBA Vanguard should not activate the company workspace for normal production use until the agreed onboarding information has been reviewed and the client has confirmed that the imported data and company-specific rules are correct.