Checklist

Ops checklist

Once the flight is created, both **OPS** and **Sales** departments can start preparing the flight for dispatch by working on particular sectors of the **Checklist**.

To access the checklist you have to either open right-hand filter, tab 'Checklist', or, click on the dot in the relevant Checklist column in the OPS view. You can also just **hover** the mouse over the dot to see its items in a pop-up window.
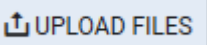
Checklist tab is devided to 2 sections depending on the department preparing the flight:

1. **Ops**
2. **Sales**

If the flight has more than one sector, you can edit each one of them and switch between them in the
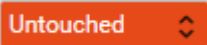
OPS view. **It is important to remember to save the changes made to the checklist, otherwise they will be lost.** It is possible to **add a note** and **upload a file** to each item of the checklist. An alternative way of uploading files is to drag & drop it into the checklist item. In order to do that you have to click on the name of the checklist item, for example CARGO. You will see space for notes and [⬆ UPLOAD FILES] button that will allow you to add files.

OPS item history of changes

After a **file is uploaded** it will show with underlined name and the tickbox i.e. [☑document.pdf]. To **remove the file** you have to untick the checkbox which will cross-out the title. Clicking on "Save" will save changes to the checklist.

By clicking the icon [•••] you will get an access to **2** functionalities:

1. **RESET STATUSES** - all items which have been set up to yellow or green statuses will turn back to [Untouched ⇕]
2. **DOWNLOAD ALL FILES** - all files attached to the particular flight will be downloaded in the **ZIP** format.

> It is possible to set up **notifications** informing of lack of action on a specific checklist item. When the status of the item remains red ("Untouched" or "?") for too long, Leon can send out an **email** informing of such situation. If you are interested in this option please contact support@leonsoftware.com and provide the email address to which the notification should be sent. The email will be sent out once every hour starting at the number of hours before STD specified by the operator.

IMPORTANT!

> **Leon archives the checklist on flights older than 6 months. If you wish to view the checklist on those flights, please contact support@leonsoftware.com**

Adding/removing items of the checklist

Items available in both checklists are the items marked in the Flight editing section of Operator Settings. Once ticked they will show in the checklist of newly added flight by default.

It is possible to add additional items and remove not needed ones while preparing the flight.
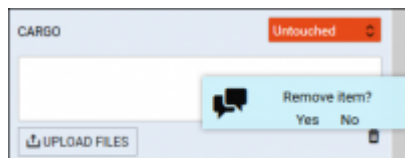
Removing items in the checklist

To **add** a checklist item you simply need to click on **+ ADD ITEM** button located on top-right part of the filter. You will get a list of items that are not ticked in the Operator Settings section but are still available. Click on the item that you need and this item will be added to this particular leg of the trip. Finally press "Save" button to save the changes.

If after pressing **+ ADD ITEM** button you see "No items left to add" message, it simply means that all available items are added to the checklist.

If there are items that you do not need in your checklist, you can **remove** them. Removing item is as simple as adding one. You just need to click on icon. A window will pop-up asking to confirm (Yes) or reject (No) the request. If you click YES, please remember to press "Save" to confirm the changes to the checklist.

Ops checklist

The items which should get displayed inside the 'Checklist' window can be selected directly within the checklist.

Some of the available sections include:

- **ATC Flight Plan** - all information relevant to the specific planned flight.
- **Operational Flight Plan** - which is prepared for the crew with fuel details, point names, winds, etc.
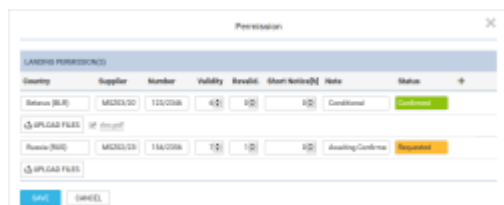
Adding permits details in a section OPS

- **Landing permission** - you can simply add permit information by clicking on "Edit" button. A new pop-up window will open where you can add permit/permits details, such as: Country, Supplier, Validity, Revalidation, Short Notice, Notes and Status. Clicking on "+" allows you to add another Permission. You can also add notes and optionally upload a file. Information added in the notes section will show in the Trip Sheet. Once the permit is added you can hover the

mouse over "Edit" button or [?] to see permit(s) details in a tooltip.

- **Overflight permission** - it can be added in the same way as a landing permission (see above).
- **Crew aware of trip** - once the crew is assigned to the trip you can set the status to 'Acknowledged'. If you make any changes in crew assigment for that flight, the 'Crew aware of trip' status in 'Legs Info' will turn from 'Acknowledged" to '?'
- **Airport slots** - split into 2 sections: ADEP & ADES.
- **PPR** - Prior Permit Required.
- **Fuel** - devided into 3 sections: Block, Burn and MRF (Minimum Required Fuel). Specific fuel suppliers and prices can be added in Fuel section.
- **Handling** - described further down in this section
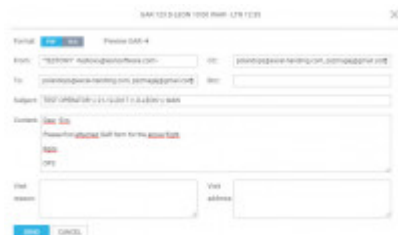
GAR panel in Leon

- **Crew transport** - here you can specify the way of transportation details for your crew. Notes added to these items will show in the Trip Sheet.
- **Hotel** - in Hotel section of Airport Directory you can specify your favorite hotel for a specific location. Once this has been done, it will show automatically when flying to this location. Notes added in Hotel section will show in the Trip Sheet.
- **Pax catering** - in notes section you can add some extra information regarding Passengers. This information will show in the Trip Sheet. For more specific information on Passengers see section PAX. We are integrated with DeliSky. To activate the integration you need to contact support@leonsoftware.com. Once the integration is in place a link will be available next to the CATERING item. Clicking on the link will transfer you to DeliSky's ordering page.
- **Pax transport** - divided into 2 sections: ADEP & ADES transport. Notes added here will show in the Trip Sheet.

- **GAR sent** - applies to UK destinations only. Located in **Customs** section of the checklist allows to send GAR email to the relevant authorities. Clicking on "Send GAR" opens an email window. It is possible to insert two GAR emails separated by a comma in the 'Airport Directory' > 'GAR emails' and they will be available from the dropdown in this section. Here you can see "Preview GAR" where you can see the document itself and check the details. Email in "To" section is taken from chosen Handler email. If the handler has not been assigned to the flight Leon uses the relevant HMRC email. "CC" and "Bcc" emails are taken from Operator Settings. Content of an email and GAR format between fdp & excel can be defined in Operator Settings. After sending GAR status changes to "Requested".
- **Cargo** - section where you can insert the cargo value.**Cargo value input** is only available for **Non-Cargo Operators**. **Cargo Operators** will only be able to insert the cargo values in the 'EDIT TRIP' section as **Cargo value input** has been removed from the 'CARGO' item in the checklist. It is disctated by the technical aspect of the application and keeping the inserted data in one place in database rather than 2 separate places.

Changes history

To check the history of changes done in a particular item you need to **click on the item name** and then click on the 🕐 icon below the notes section. Leon will show a pop-up window with history changes details. The history changes window will include changes to both **checklist item status** as well as **the notes**.

In the changes history window, Leon shows the chronological list of all changes (the latest on top). The colours indication shows added data in green, changed data in yellow and removed data in red.

You can also trace a history of one item changes by clicking on the status. Leon will then highlight the initial entrance of the details as well as all the changes that applied. Below you can see it by example of the Handling Request status changes:

You can also click the icon 🕐 SHOW TRIP HISTORY and check details of the schedule changes in the pop-up window displayed.

Overflight Permits requesting

It is possible to **request** organising an 'Overflight permits' via one of the Flight Support companies that are using Leon.

Overflight permit request window

To do that you need to:

1. Open an **OPS checklist** and click on the **Request via flight support** link available underneath 'OVERFLIGHT PERMIT(S)' item.
2. Choose the relevant **Flight Support** from the dropdown list.
3. In the pop-up window insert **Reply to** email address. You can also amend the message in the text boxes. You have to insert the details only once, next orders will remember the input.
4. Press **SEND** - the 'Flight Support' will contact you back to 'Reply to' email address.

The status of the permit will change to '?' if schedule details (STD, STA, ADEP, ADES) have been changed (unless the status was set to 'N/A' - then Leon will leave that status unchanged)

Handling

Handling Request section in OPS Checklist

Adding ad-hoc HR items to a particular leg

Handling Requests section of the checklist is split into 2 parts, same as 'Airport slots'. For each particular airport you can choose a handling agent you wish to use (also see section Airport Directory for more information as to how to set default handling agents).

Here is the explanation for the icons showing in HANDLING section:

- **HANDLING (LFMD)** - clicking on HANDLING(AIRPORT CODE) allows you to add extra notes as well as upload files. Once the file is added and saved, it will show as ☑document.pdf .

- 📋 - this icon displays after some notes are added to HANDLING section. Hovering the mouse over this icon will display notes in a tooltip.

- ⬆ - this icon displays after uploading and saving a file in HANDLING section. Hovering the mouse over this icon will display a tooltip with the name(s) of files uploaded.

- ☰ - by clicking on this icon you will be able to add **Requested handling items** on ADEP/ADES, and **Hotel details** information on ADES. It is possible set up **default Items on Departure/Arrival** as well as **HOTAC information** can be added in Handling requests section of Leon, which then will populate here automatically. If there are some extra items required they can be typed in in the Request window. **Requesting Hotel via handling function is optional and available at ADES only**. If this checkbox is ticked Handling Request email will include HOTAC details, if it is unticked - this part will not be included in Handling Request email. Below you can see an example of **Requested handling items at ADES** window.

- ℹ - hover the mouse over to get an information regarding a handling agent: email address, phone number, fax, WWW, SITA, etc...
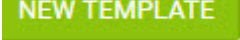
In HANDLING section you can also check what changes have been made to the flight that affected handling request status. To check it simply hover the mouse over the HR status and the information will be displayed in a tooltip.

Notes added in this section will also show in the Trip Sheet document. More information on Handling Request functionality can be found here.

Attaching extra documents to HR email

GenDec and/or PAX Manifest can be attached to a Handling Requests email by marking a checkboxes: 'Attach GenDec' and 'Attach Pax Manifest' at the bottom of the HR sheet.

It is now also possible to attach an **additional document** when sending out Handling Requests email. By default this document is named 'Handling Request Manifest' and the layout of this document is the same as 'PAX Manifest' document, however, it can be **re-named and re-arranged** in Documents Manager panel into a custom document, if needed.

Go to Settings > Documents Manager panel, click **NEW TEMPLATE** and select Handling Request Manifest. When a pop-up window appears insert document's name (or leave as Handling Requests Manifest) and add document's version.

Handling Requests - attaching an additional document to HR email

Below you can find an example of a custom document 'Custom PAX Manifest' added to HR panel.

Once it's saved you will find this document as unpublished (indicated with the white dot, if you change in the upper filter from YES to NO).

Edit the document and re-arrange it in Documents Manager panel according to your needs by using 'Available Data' items and HTML/CSS panels. Once it's all adjusted, publish the document (click the white dot which will become green).

In a section OPS > Checklist > Handling, when sending a new Handling Requests email, it will be possible to attach new document along with GenDec (see screenshot on the right).

GAR

GAR panel in Leon

An example of a GAR document in pdf

Sending **GAR** documents is very similar to sending Handling Requests. When the PAX list is ready you

should click **Send GAR** button in the Checklist tab (right-hand filter).

You will find two 'Send GAR' buttons which allow you to send this document to handling agent at selected airport separately.

After clicking the proper button a new window will appear on the screen. It allows you to edit default email content and preview GAR document by clicking **Preview GAR ->** link.

A default email content for GAR can be defined in section Settings > Handling Requests, field 'Default GAR email content', as well as 'From' and 'Cc' email addresses.

It is possible to add **information** such as: Visit reason and Visit address into the editable screen, which will get exported onto the GAR sheet.

An option to select between **XLS** and **PDF** formats when sending GAR is also available. In a section Settings > Handling Requests you can define a default GAR format.

Sales checklist

Sections directly related to **Sales** are separately divided in Flight editing page where you can select the sales **checklist status** to be included in overall trip status. Items selected in a section Settings > Flight Editing will automatically apply to each flight. Similarily to Ops checklist, you can add and remove items as you work on the flight. Here you can also add notes and upload files.

2 items are particularly important in SALES checklist:
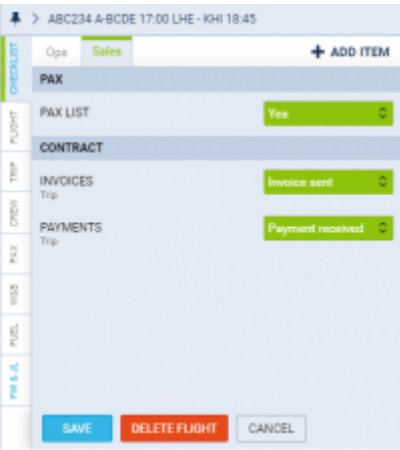
Sales checklist

Invoice	Payments
The applicable statuses and their colours in this item are as below	This item has been added to separate typical 'Invoice' statuses from those related to 'Payments'

Invoice	Payments

Each section has its own drop down menu where the status is selected by default. 'Untouched' means that nothing was done about this item. Various sections have different status options with different colours assigned.

The colour of dot on the 'Flights list' page gives you a quick information about flight preparation status.

- ● - flight is ready - everything has been prepared.
- ● - flight is not ready - some items are waiting to be confirmed.
- ● - flight is not ready - some items require work done.

If an item concerns the entire trip (not a single leg) Leon will show TRIP right below the item's name.

Payments

If you use an item **Payments** in your Sales checklist, Leon will show in the CALENDAR section an additional icon **$** in the flight's rectangle (right next to the checklist dots) in 3 colours: red, yellow & green.

The colour of the icon **$** corresponds with the colour of the 'Payments' item's status (see examples below).
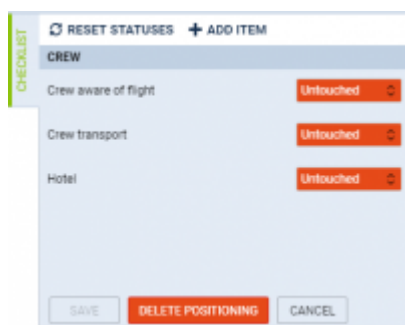

Sales checklist items

 -> **Payment received**

> **To enable this option in the Calendar, you need to mark a checkbox** ☑ Payment status **in the left filter, tab SHOW**

Positioning checklist

Positioning checklist default items

By clicking on a **Positioning** checklist dot in a section OPS (right-hand filter), Leon shows 3 default items of which statuses can be set up.

A button **+ADD ITEM** allows to add more items (previously defined in a section Settings > Flight Editing) in the same way as with OPS or sales checklist.

RESET STATUSES button turns all items statuses back to 'Untouched'.

> **If you wish to have a custom item/items in your checklist (OPS or Sales), please contact our Support Team with the information of item's name and statuses needed.**

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