

Checklist

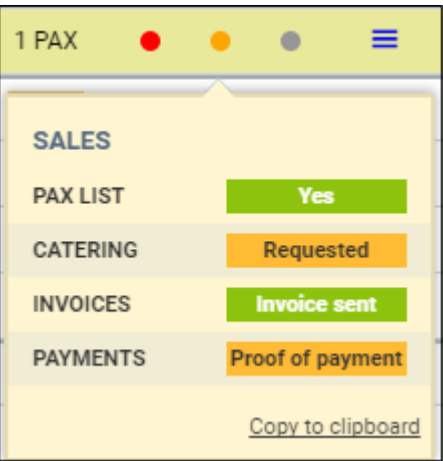
Video Tutorial



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.



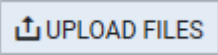
Checklist tab is devided to 2 sections depending on the department preparing the flight:

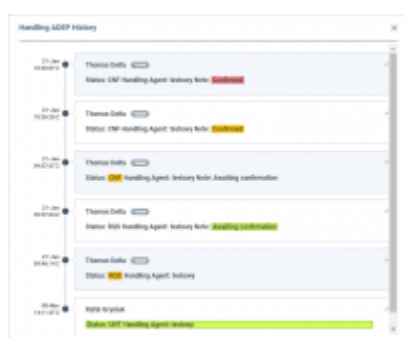
1. **Ops**
2. **Sales**

It is possible to **roll up the sub-section of a checklist**. Each sub-section has a **coloured dot**


indicating summarised status of items in the sub-section:


- **Green** - all checklist items in the sub-section are green
- **Orange** - at least one item in the sub-section has orange status with all others either on green or white ('Not Applicable')
- **Red** - at least one item in the sub-section has red status
- **Grey** - all checklist items in the sub-section are on 'Not Applicable' status


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  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 
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 about 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 go to 'Settings > Checklist Notifications' panel and mark items.

IMPORTANT!

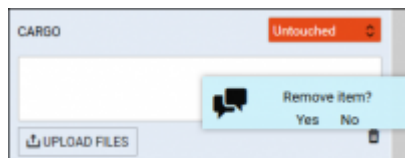
Leon has archived the checklist on flights older than 6 months. If you wish to view the checklist on those flights you need to

have a privilege to edit the checklist turned on (in a section Settings > Privileges)

Adding/removing items of the checklist

Items available in both checklists are the items marked in the [Flight editing](#) section. Once ticked they will show in the checklist of newly added flights 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 the **+ ADD ITEM** button located on the 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 the "Save" button to save the changes.

If after pressing **+ ADD ITEM** bottom 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 items 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.



Permits panel in Leon

- **Landing permission** - you can simply add permit information by clicking on the "Edit" button. A new pop-up window will open where you can add permit/permits details, such as Country,

Supplier, Validity, Entry point, Exit point, 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 the “Edit” button or  to see permit(s) details in a tooltip.

- **Overflight permission** - it can be added in the same way as 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 assignment 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. Times inserted in the slots change in accordance with changes of the schedule if the status of the Slot is set to red ('Undecided' or '?'). Any other status will not change the slot timeframes and status.
- **PPR** - Prior Permit Required.

FUEL[lbs]				
Block:	Burn:	MRF:	Requested:	Flight Time:
2200	1800		1100	01:20

- **Fuel** - divided into 4 sections: Block, Burn, MRF (Minimum Required Fuel), Requested, and Flight Time. It is possible to include value inserted in the 'Requested' field in the 'Fuel Order' email by editing the 'Fuel Order email template' and using available data located under the `fuelOrder.flights.checklist`. 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 the 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 the Hotel section will show in the Trip Sheet.
- **Pax catering** - in the 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.
- **Sponsor** - this item will allow indicating whether there is a person or organization that pays for or contributes to the costs involved in the visit. The element can be selected by default in the 'Flight editing' settings > 'OPS Checklist items' and it will apply automatically if **ADES** is located in one of the **countries from the list**: Afghanistan, Algeria, Argentina, Armenia, Azerbaijan, Belarus, Chile, China, Congo (DRC), Ivory Coast, Cuba, Ghana, Guinea, India, Indonesia, Iran, Israel, Kazakhstan, Kenya, Kyrgyzstan, Liberia, Mali, Mongolia, Myanmar, Oman, Pakistan, Rwanda, Saudi Arabia, Senegal, Serbia, Tajikistan, Tanzania, Togo, Uzbekistan, Venezuela

- **GAR sent** - applies to UK destinations only. Located in the **Customs** section of the checklist allows sending GAR emails 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 the "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 [GAR emails](#). Content of an email and GAR format between FDP & excel can be defined in [GAR emails](#). After sending GAR status changes to "Requested".
- **Cargo** - a 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 dictated by the technical aspect of the application and keeping the inserted data in one place in the database rather than 2 separate places.
- **ACC3** - the item can be selected in the 'Flight editing' section > ' OPS checklist items' and it applies to cargo flights scheduled from outside EU to EU. Item appears on the checklist when cargo value is greater than '0' with the checklist status '?'. If the value is reverted to '0' the checklist status changes to 'Not Applicable'

When sending **Requests** for 'Catering' or 'Fuel', it is possible to send a copy of the email to the crew: there are separate checkboxes for the cockpit & cabin.

REQUEST

WE KINDLY REQUEST CATERING FOR THE FOLLOWING FLIGHT

REGISTRATION: B-ARTI
OPERATOR : Manual

ON AIRPORT:

ICAO: EPHK
IATA: KRK

SCHEDULE :

> MAN *EPHK* KRK 0700Z EPWA WAW 0750Z (13-Aug-2021)

UPLOAD FILES

You can drag & drop files to this section.

☐ Send copy to cockpit crew
☐ Send copy to cabin crew

CANCEL
SEND

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:

21-Jan
09:57:37 Z

Thomas Delta TODAY

Status: **CNF** Handling Agent: testowy Note: Awaiting confirmation

21-Jan
09:46:14 Z


Thomas Delta TODAY

Status: **RQS** Handling Agent: testowy

08-Nov
14:11:37 Z

Rafał Gryniuk

Status: **UNT** Handling Agent: testowy

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

Get Country List in Overflight Permits



'Get Country List' option

It is now possible to **search for the list of countries** for Overflight permits purposes using alternatively Route Finder calculated route, or your actual FPL routing.

In order to search for the countries, the **following steps** need to be performed:

1. Go to 'OPS Checklist' and click on the 'REQUEST' button next to the 'Overflight permit(s)' option
2. In the "Routing" text box copy-paste items 13-16 (from ADEP to ALTNs), or leave it empty
3. Click on the 'GET COUNTRY LIST' button within the 'PERMITS' pop-up window
4. If FPL routing is entered, it will be used to generate the country list
5. If routing was empty, the route and country list will be generated using Route Finder
6. When the list of countries appears, check if all the necessary countries are listed, and remove unnecessary ones
7. 'SAVE' the selection

Additionally, based on the Routing, Leon will automatically fill in the '**Entry point**' and '**Exit point**' fields.

When no FPL routing is used, the country list is generated using the route calculated by Route Finder and may not match the planned route. Please review and apply changes to the list if required.

Permits requesting



Setting up email templates for permits

It is possible to **request** directly from Leon **Landing permit** and **Overflight permit**.

In order to make this work, follow these steps.

1. Defining email templates

In a section Settings > Email Templates click **ADD TEMPLATE** and select either 'Landing Permits' or 'Overflight Permits'. You will also need to add name of the template (it can be country or revision).

On the new page you can insert email **Subject** and below you can re-arrange the default **Body**, by using **Available Data** items from the right filter. Another tab **Recipients** allows to define default email addresses: From, Reply to, CC and BCC. Once it's all set up you can use sending permits requests from the section OPS.

2. Adding permits details



Requesting permit in Leon

REQUEST

In the **Checklist** panel click button **REQUEST** next to 'Landing permit' or 'Overflight permit' items (if items don't appear as default ones, click + **ADD ITEM** button).

Once a new pop-up window got displayed (see screenshot on the right), fill it in with details, such as:

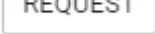
1. Country
2. Supplier
3. Number
4. Validity

5. Revalidation
6. Note
7. Status (select from the drop-down box)

You can also mark a checkbox 'Short notice 72h', if necessary. Clicking + button allows adding another permit's details.

Sending permits email

3. Requesting permits

The last step is **sending a permit email**. Click a button  and Leon will show a window for sending permit request email with previously set up data, apart from an email address '**TO**', which needs to be added manually.

There, you can also request permits for multiple countries, by selecting the checkboxes by the country names. The names on of the countries can be automatically included in the email content, depending on the Overflight Permit email template setting.

Additionally, the email pop-up window contains the '**MESSAGES**' tab.

Once the correspondence is triggered from Leon, and the 'Reply to' email address is connected to the mailboxes, the history of emails is kept in this tab.

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 .
- - 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.
- - hover the mouse over to get an information regarding a handling agent: email address, phone number, fax, WWW, SITA, etc...

Handlers can also be **assigned automatically** when creating a trip, in the following order:

1. **Requester** - applies when the trip is created from the 'Requests/Quotes' part of Leon. Preferred Handler selected in the Requester profile
2. **Fleet** - Handler selected in the Admin Panel > Fleet > SALES tab section
3. **Airport Directory - Favourite** - Handler marked as 'Favourite' in the Airport Directory
4. **Airport Directory - Approved** - Approved date selected in the Airport Directory

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.

New Template

Type

Handling Request Manifest

Template

Template 1

Document Name

Custom PAX Manifest

Version

REV1

CANCEL

SAVE

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).

Filter by:

Type

Language

No

Name ^	Type	Language	Published	Last modified	Action
CUSTOM PAX MANIFEST REV1	Handling Request Manifest	English	<input type="radio"/>	27-Sep-2019 12:22	

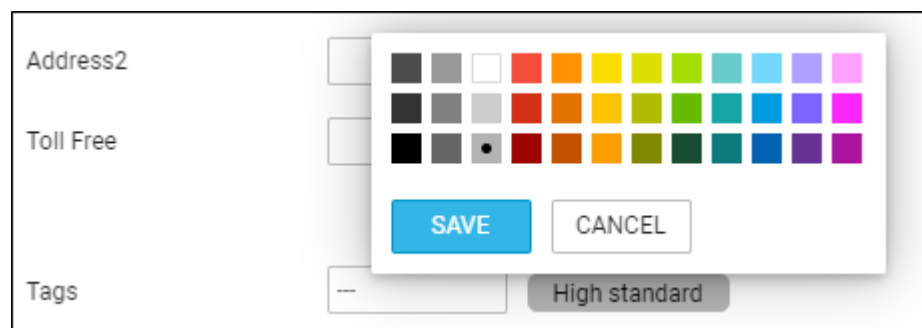
Edit the document and re-arrange it in Documents Manager panel according to your needs by using 'Available Data' items and HTML/CSS panels. Once it's all adjusted, publish the document (click the white dot which will become green).

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).

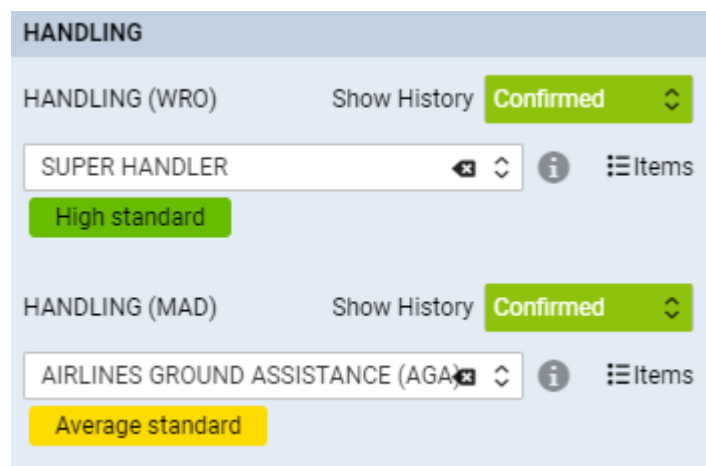
Tagging Handling agents

We have added a new option of **tagging** Handling agents/FBOs. Sometimes it is required to inform the crew whether the standard of the chosen handling agent is high (and no crew oversight is needed), or if crew should be present for the majority of services, or if crew need full oversight to check everything that handlers do.

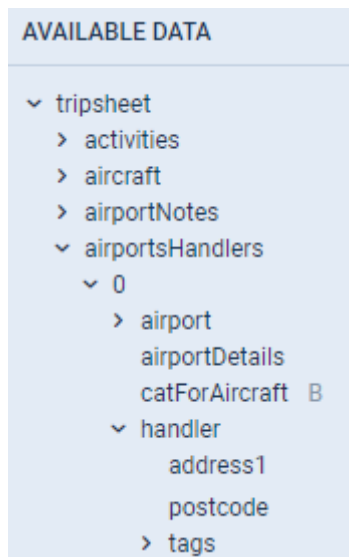
The first step that needs to be taken in order to set it up is creating tags for a particular handler. Go to **Airport Directory**, edit an airport and in a tab 'Handling/FBO' edit a handler and in the field **Tags** insert tag's name, then select a colour and save. You can create multiple tags for each airport (see example below).



When assigning handlers in the **checklist**, Leon will show the tag right below handling's name:



The next step is connecting already added tags to **Crew Trip Sheet** document, in **Documents Manager** panel by using the item 'tags' in the 'Available Data' filter.



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.

Visit reason can also be selected from the drop-down box, where options are: Short-term visit, Based, Maintenance, Permanent Import.

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.

As for the **Channel Islands' GAR form**, the visiting address will be automatically filled in in the following order:

1. Crew Hotel selected in the Checklist
2. Crew home address if crew Home Base is either Jersey or Guernsey
3. 'Visiting Address' in the GAR mail window. For PAX, it will be the 'Visiting address'

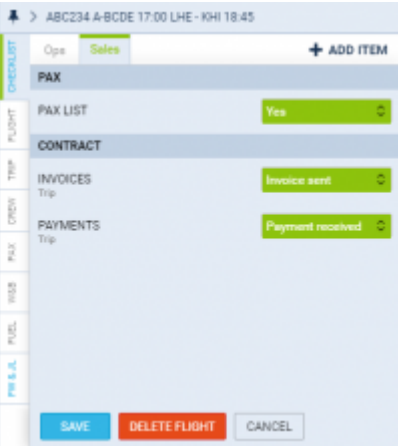
Channel Islands GAR's are only available in the PDF format.

From the 01-04-2020 it is only possible to upload GAR form on [GAR submission website](#). More information and guidance about the new way of submitting GAR can be found [here](#).

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. Similarly 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
<div><div>Untouched</div><div>?</div><div>Proforma requested</div><div>Approved</div><div>Invoice requested</div><div>Proforma sent</div><div>Invoice sent</div><div>Not Applicable</div></div>	<div><div>Untouched</div><div>?</div><div>Proof of payment</div><div>CC Deposit</div><div>CC Charged</div><div>Payment received</div><div>Credit Agreed</div><div>Not Applicable</div></div>

Each section has its own drop-down menu where the status

Untouched

 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 the dot on the 'Flights list' page gives you 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.

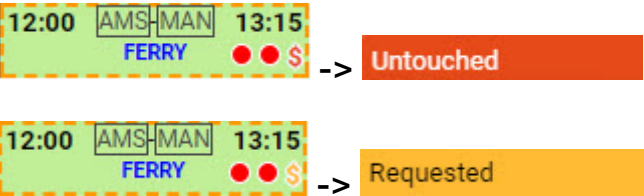
Payments

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).



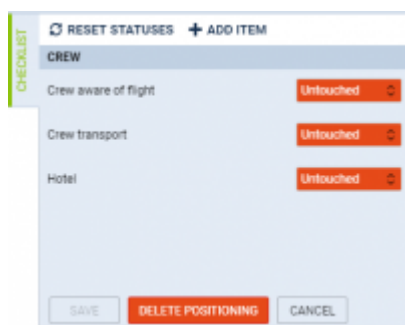
Sales checklist items





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 adding 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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