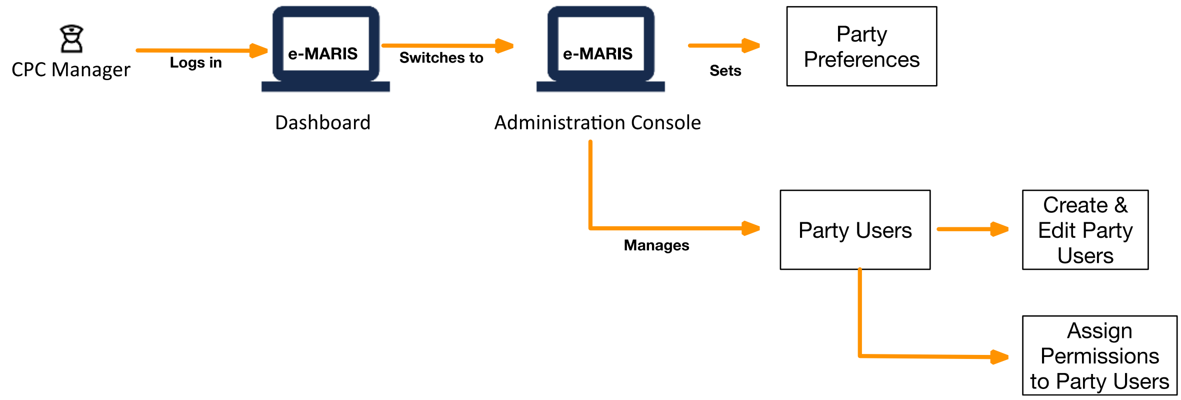
e-Maris Quick Start series for CPCs: Managing your Party and Users

Updated: 23/04/2024 09:14:00

What is this guide about?

This quick start guide will explain how you, a Party Manager, can manage your Party Users, as well configure e-MARIS preferences for your whole Party.

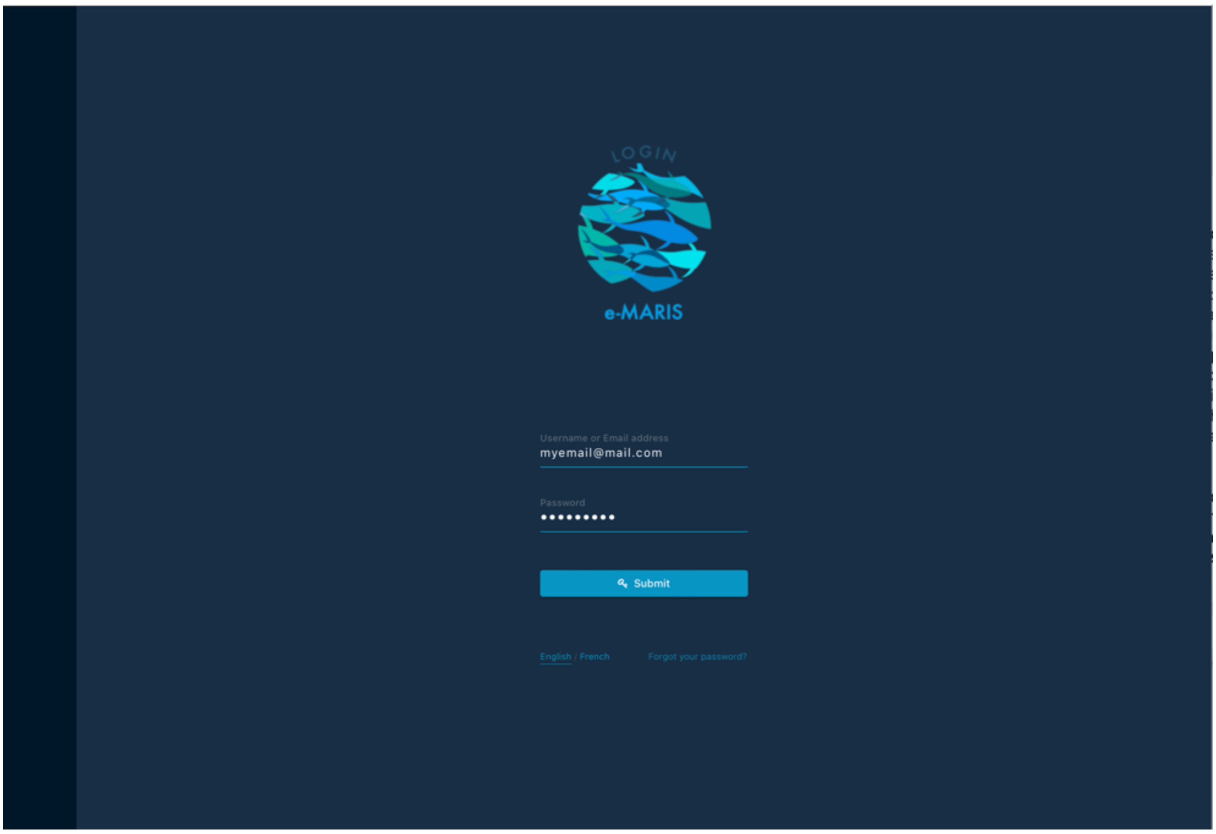
Overall workflow covered in this guide:



CONTENT

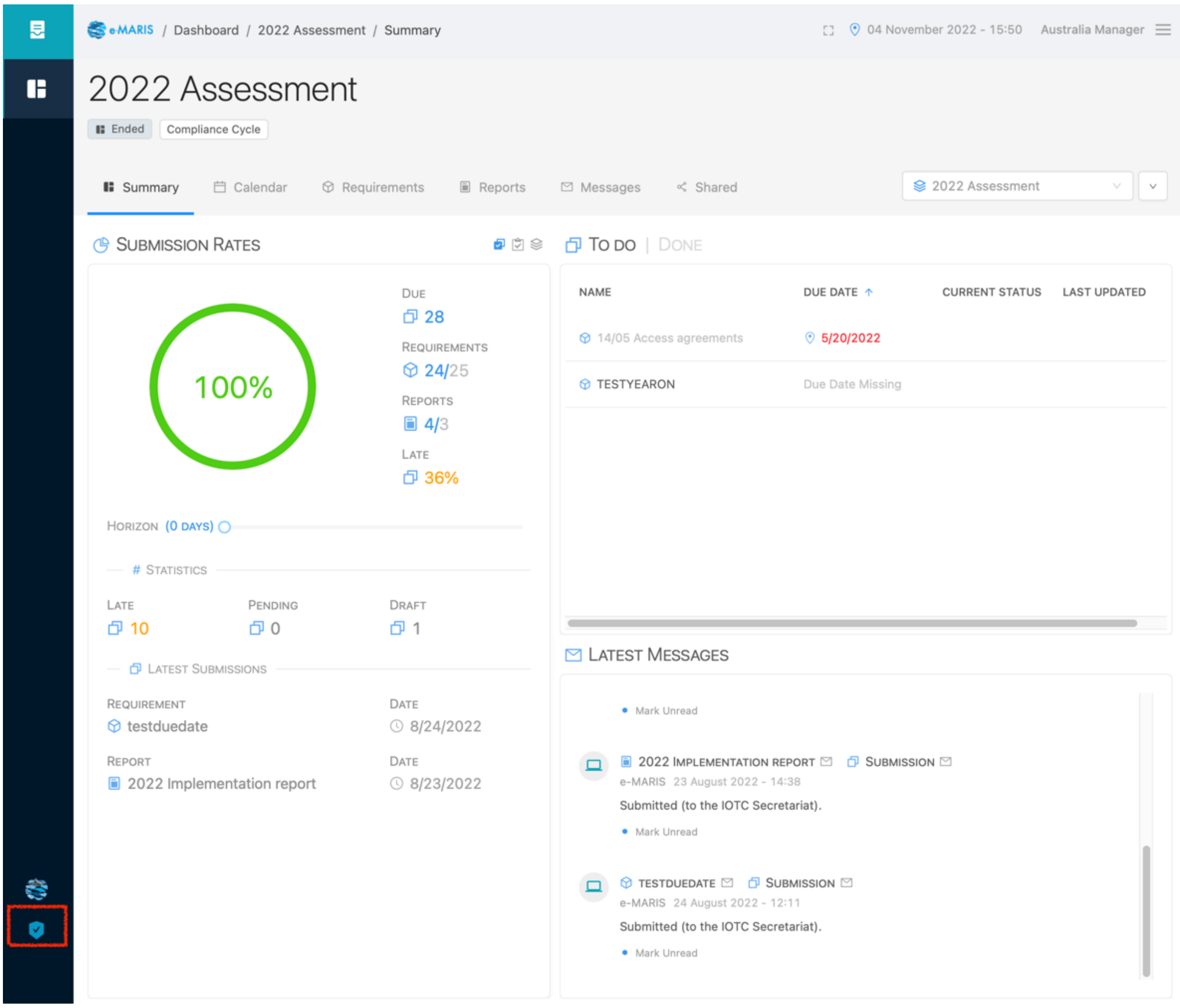
Access the Administration Console

STEP 1: Open the e-MARIS URL in your web browser:
http://emaris.iotc.org
and enter your username or email and password in the login screen, then click “Submit”.



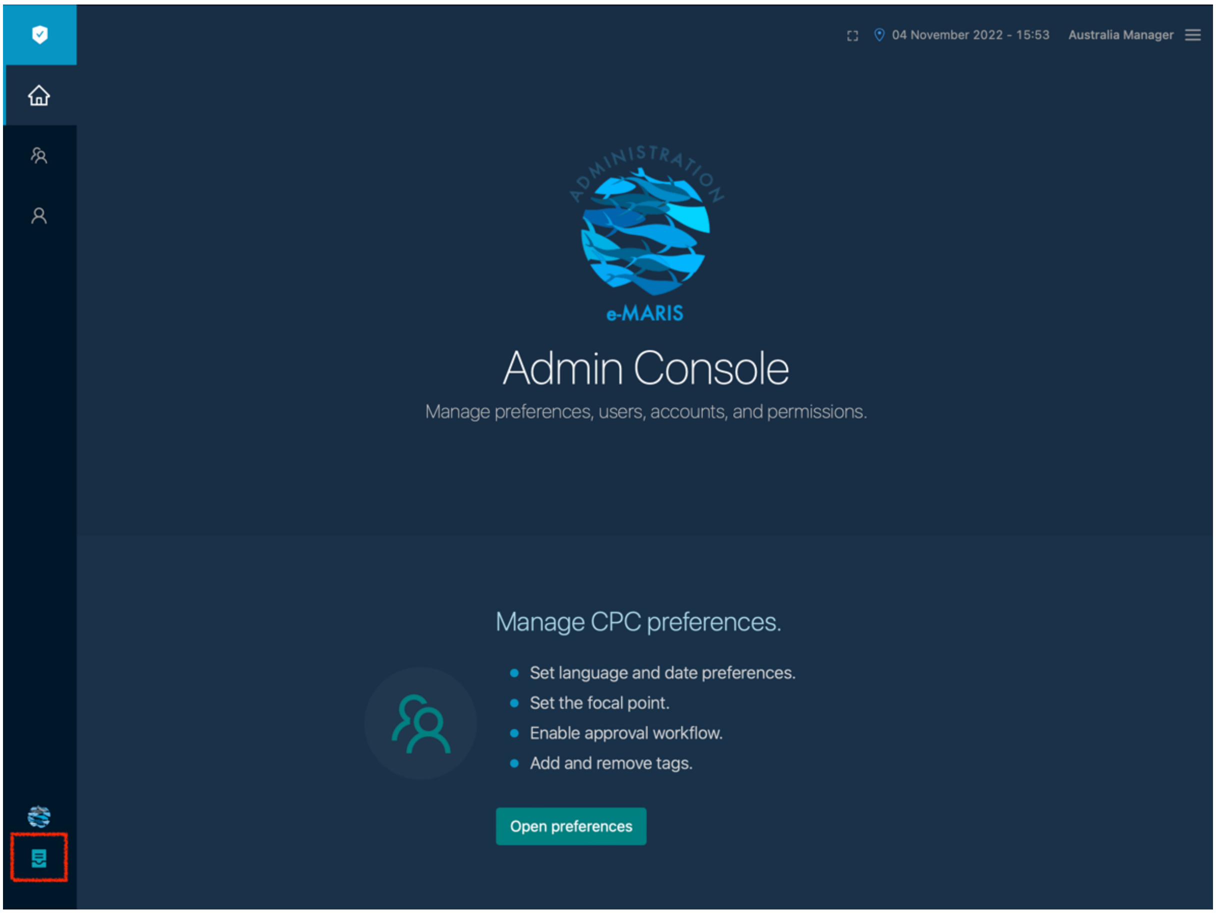
Note that once connected, the application will keep you logged in for several days, unless you log out manually.
Once logged in, you will land on the Reporting Console, with your CPC’s Dashboard.

STEP 2: **Switch to the Administration Console** by clicking on the “Shield” icon at the bottom of the left sidebar.



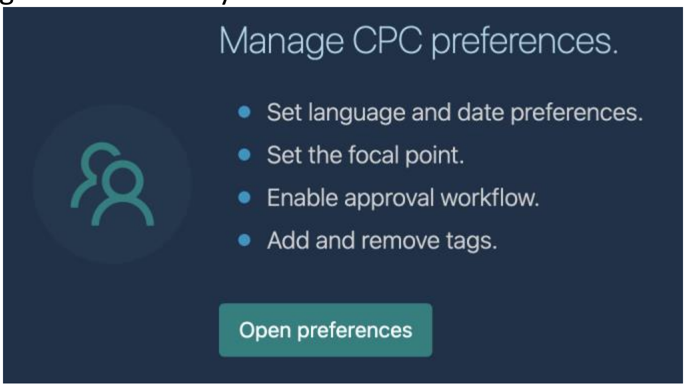
You will then land on the Administration Console home page.

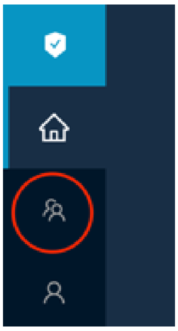
Note: If you want to go back to your Dashboard, click the Reporting Console icon at the bottom of the left sidebar



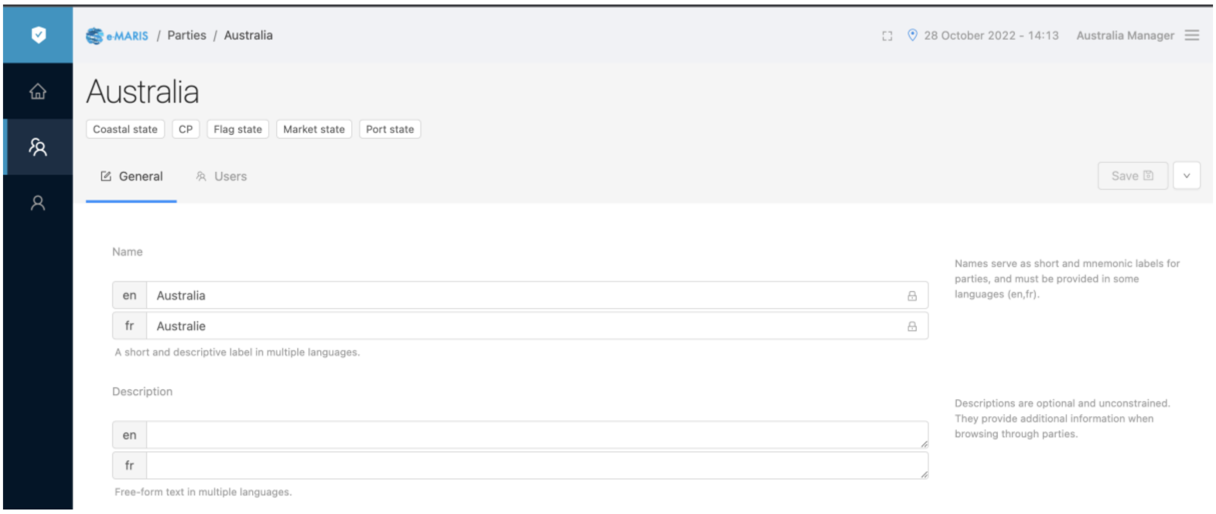
Configure your Party's e-MARIS preferences

STEP 1: **Open your Party preferences** by clicking on the "Open preferences" button on the Home page or on the Party icon in the left sidebar.





This will open the Party preferences screen.

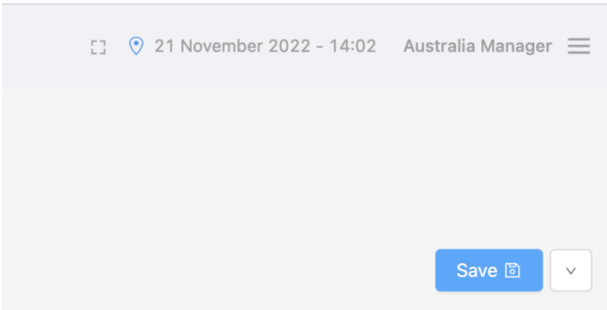


STEP 2: Edit or set the following information about your Party:

- **Description**: your assigned Party name is short for display purposes, but you can use this field to indicate the full name of your Country.
- **Focal point**: in the list of Users of your Party, you can select one who will be designated focal point; this can be useful for the IOTC Secretariat staff if they need to contact someone from your Party about e-MARIS.
- **Language**: you can select the default language in which the application will be displayed, applicable to new users (each user can then change that value).
- **Home Location**: you can select the default time zone in which the application will be displayed, applicable to new users (each user can then change that value).
- **Approval Lifecycle**: you can select whether your Party has a process in place where requirements and/or reports must be approved by a manager before submission (see below).
- **E-mail**: if you enter an email address, any notification email sent by e-MARIS to your party users will also be copied to that address. This is entirely optional, but if you specify an address, it is recommended to provide an email address for which the emails received are monitored by your users(s).
- **Notification topics**: you can filter which notifications should be emailed to the above address.

Note: Fields shown on screen that can only be edited by IOTC Secretariat staff are marked with a padlock icon and are not described here.

STEP 3: Once done, click the blue Save button at the top right of the screen.

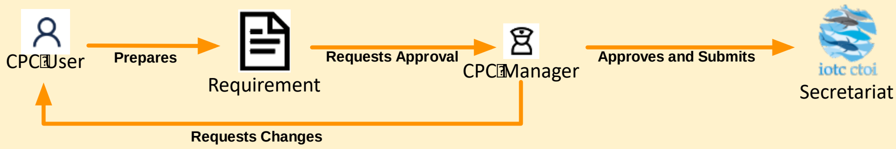


Approval lifecycle

You can choose between two main Approval Lifecycles depending on your internal workflows:

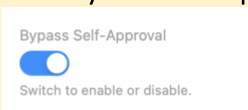
- *No approval required*:

- *Approval required*:



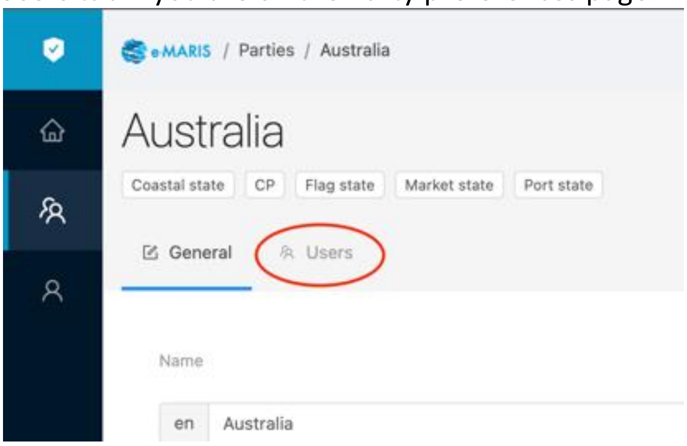
If you want, you can only enforce an Approval workflow for Requirements or for Reports.

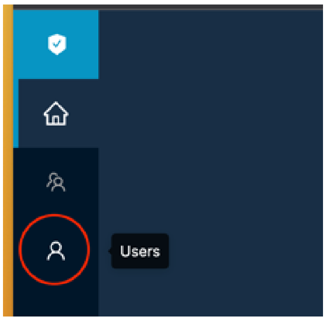
Note that, by default, if you activate the Approval lifecycle, it will also apply to Party managers, i.e. as a Party manager, if you create a new submission, you will need to request approval, then approve and submit. There is a Party-level setting allowing you to bypass the self-approval lifecycle for all your party users who can approve submissions, which you can simply toggle on or off:



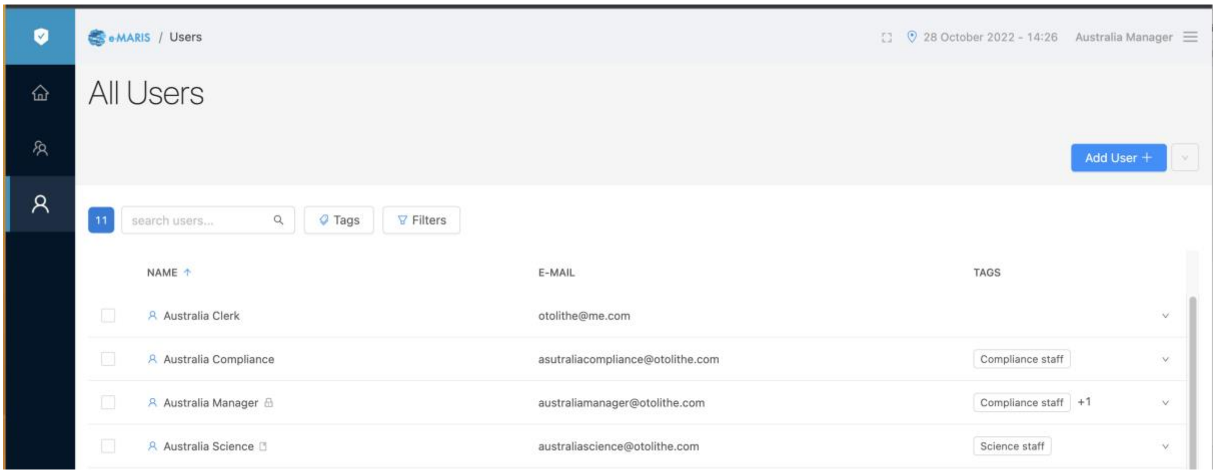
Manage your Party Users

STEP 1: **Open the list of your Users** by clicking on the Users icon in the left sidebar, or on the Users tab if you are on the Party preferences page.

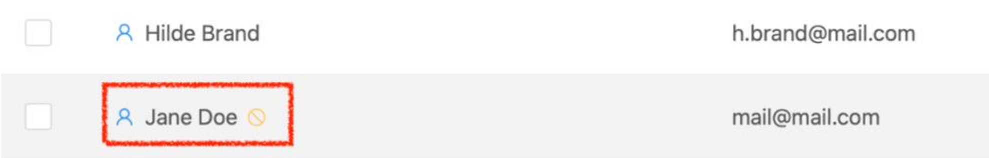




This will open the list of all your Party's Users.



Note that Inactive Users (see below) are marked with a specific icon:



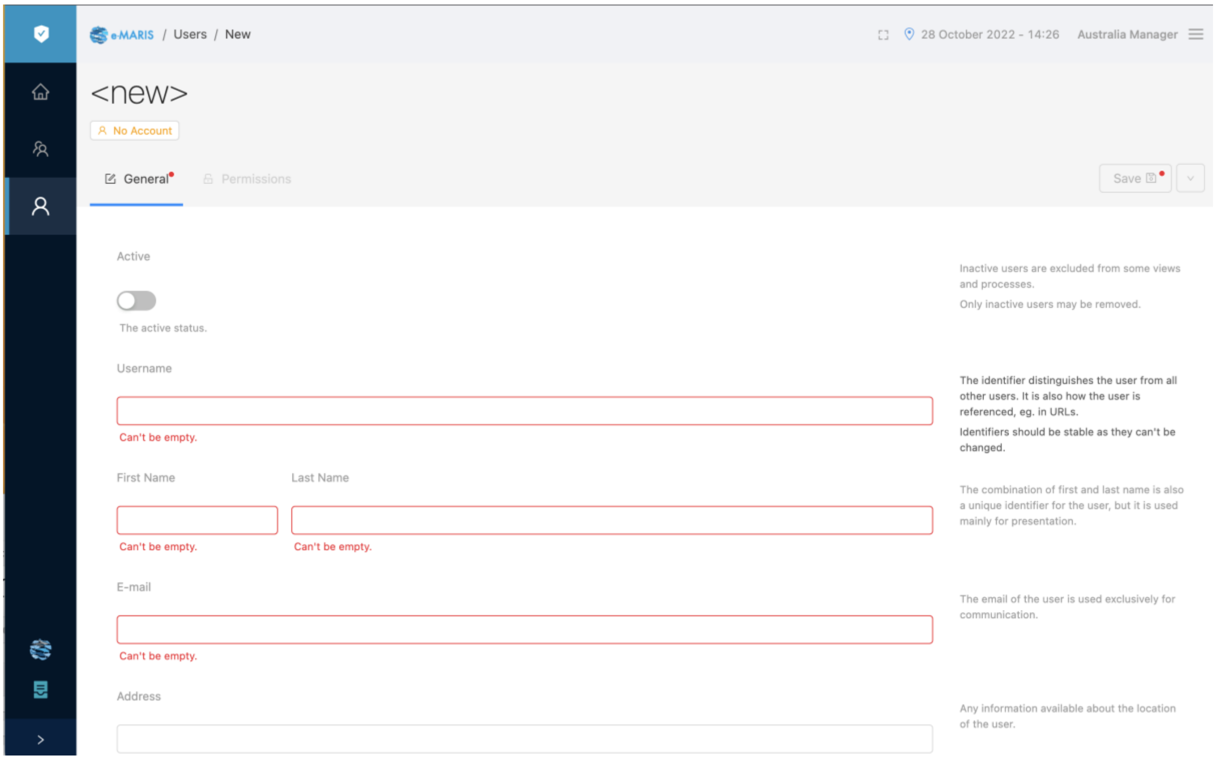
About Users in e-MARIS
Who are e-MARIS Users and who should you create one for? Any person who needs to access e-MARIS needs to have a user account. As a CPC manager, you can create and manage as many CPC users as you need. You can then assign permissions to each individual user, to define what they can and cannot do in the system. For example, if you assign no permissions at all to a User, then they will only be able to consult the Dashboard, requirements, submissions etc., but not actually submit anything.

STEP 2: See the sections below for what you can do with Users

Create a new User

STEP 1: Click on the blue "Add User +" button on the top right of the screen.

When creating a new User, some fields are mandatory and are highlighted in red.



STEP 2: Fill all the required fields and as many optional fields as needed

Here are the available fields:

- **Active**: this activates or deactivates a User. Only Active users can connect to and use e-MARIS.
- **Username**: this is an internal user name that must be unique across the whole of e-MARIS. Users won't use this on a day-to-day basis.
- **First name** and **Last Name**: self-explanatory, must be unique within your Party.
- **E-mail**: this is the email for that user, which will be used to connect to e-MARIS, but also to receive notifications from the application; it must be unique across the whole of e-MARIS.
- **Address**: self-explanatory.
- **Phone**: self-explanatory.
- **Profile**: if needed, you can assign a Science or Compliance profile to a User. If you do, then that User will only be able to submit Requirements or Reports that have been tagged with that same Profile.
- **Language**: self-explanatory, by default as set in the Party preferences.
- **Home Location**: self-explanatory, by default as set in the Party preferences.
- **Preferred time zone**: the time zone in which the User wants to see dates and times displayed in e-MARIS.
- **Default Dashboard view**: the page the User lands on when they log in to e-MARIS.
- **Preferred calendar view**: whether the Calendar is displayed by default in List view or Month view.
- **Alternative email**: if defined, a copy of each email notification sent by e-MARIS to that User will be send to this email address.
- **Notification topics**: allows you to filter which notifications should be emailed to the User.

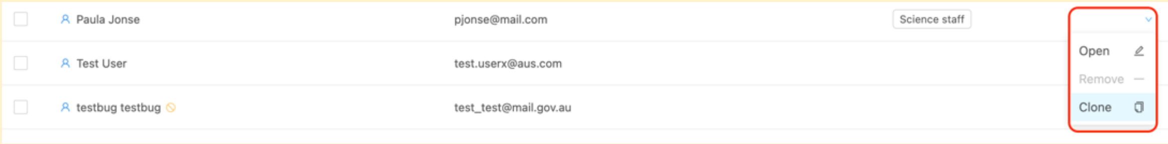
STEP 3: Once done, press the blue "Save" button on the top right of the screen to create the user.

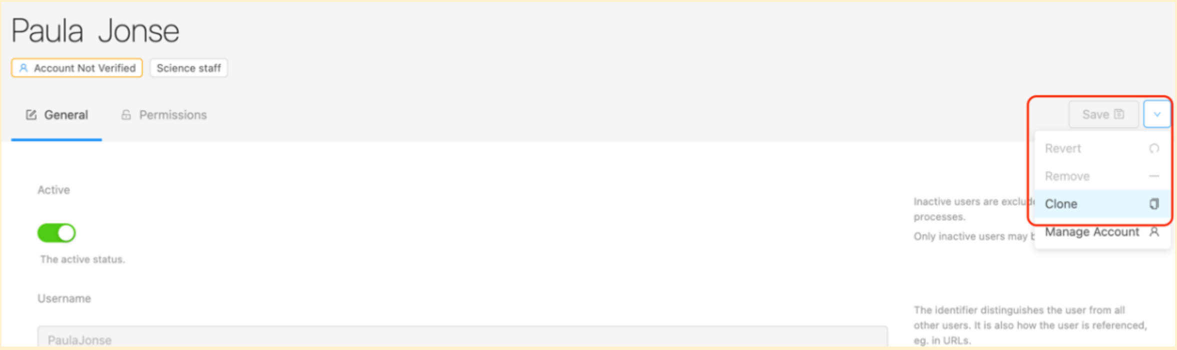
Cloning a User

If you need to create several Users with similar properties, you can simply Clone an existing user, which will create a new User as an exact copy (including details and permissions) that you can then edit.

STEP 1: Select the User you want to Clone

You can access the Clone command from the list of All Users, or from a User's page.





STEP 2: Click the Clone button

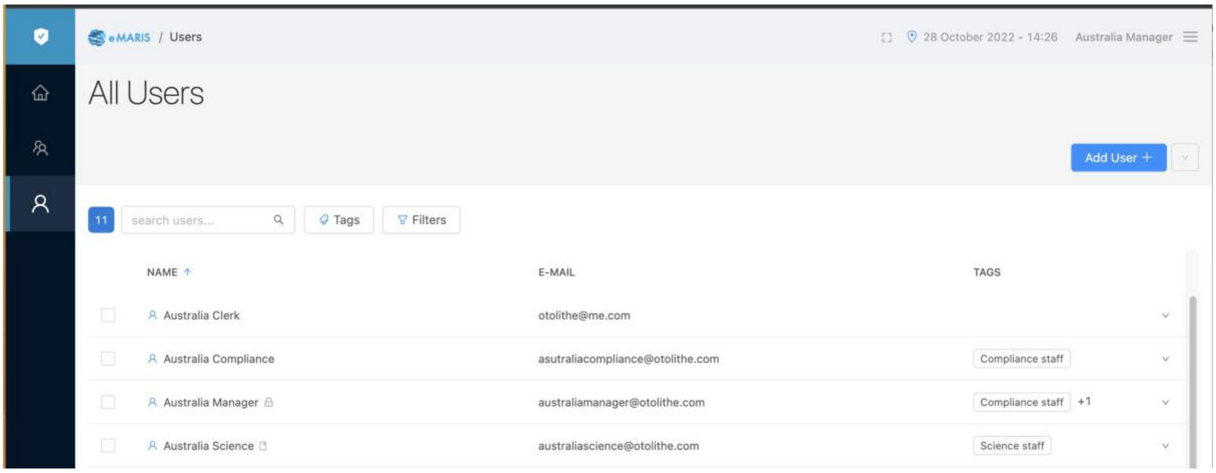
This produces a full copy of the source User and open it in Edit mode.

STEP 3: Change the mandatory field values (Username, First & Last Name and email, as those have to be unique in) and, if needed, the other User details.

STEP 4: Once done, press the blue "Save" button on the top right of the screen and the new User will be created.

Edit an existing User

STEP 1: Open the User's page by clicking on it in the list of All Users to open it in Edit mode.



STEP 2: Modify the information about the User, as needed.

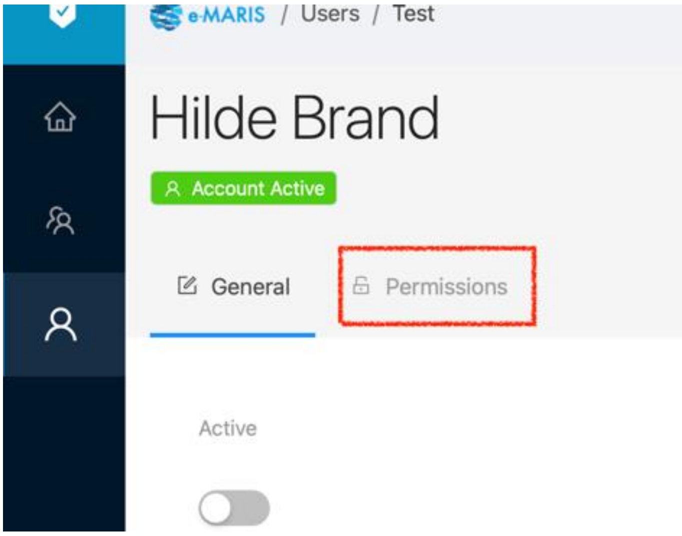
STEP 3: Once done, press the blue "Save" button on the top right of the screen.

Assign permissions to a User

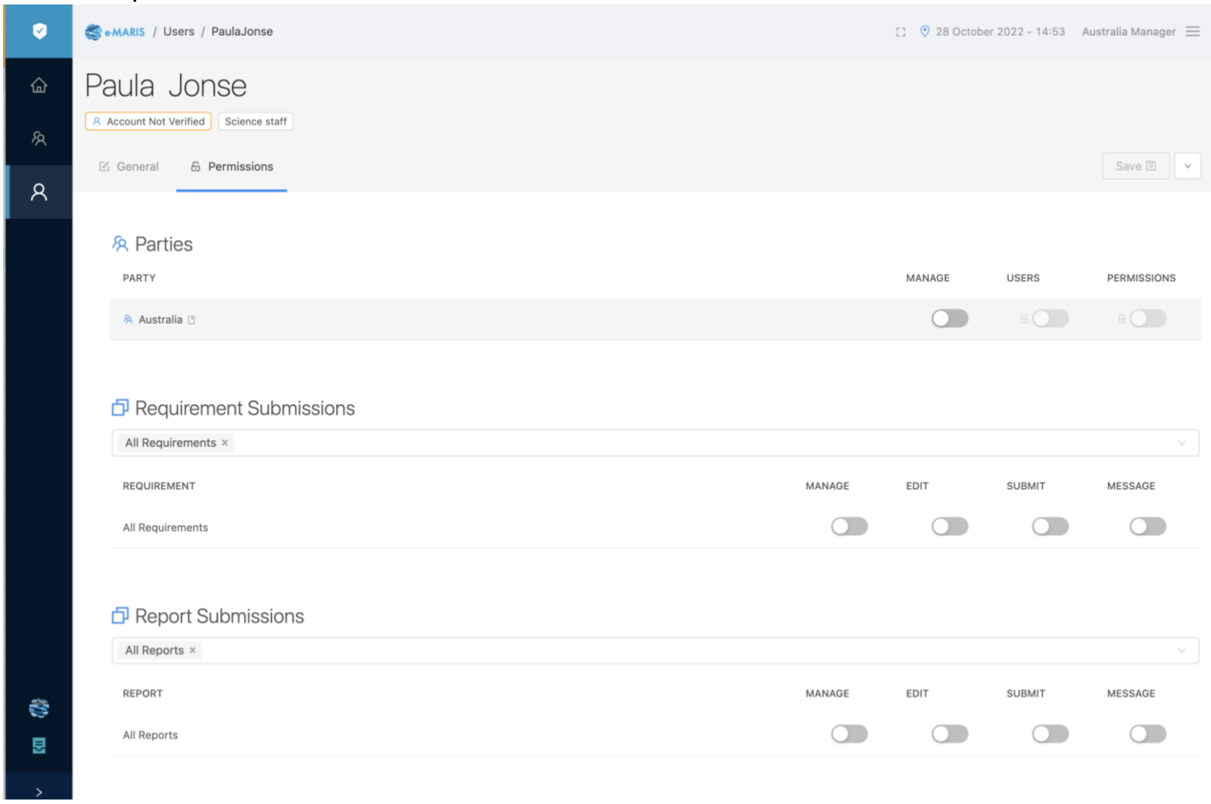
Once you have created a User, you need to define what they can do in e-MARIS. This is done through Permissions.

STEP 1: **Open the User**.

STEP 2: **Click on the Permissions tab**



This will open the Permissions screen:



STEP 3: **Assign permissions to the User**, as required, by toggling the relevant switches ON or OFF

Permissions define what a User can do in the various sections of the application

- **Parties**: Manage means the user can Create or Edit Users and can assign Permissions.
- **Requirement Submissions**: Manage means the user can do everything; Edit means they can prepare and save draft Requirement submissions, and ask for their approval; Submit means they can directly submit a Requirement to the IOTC Secretariat; Message means the User can send messages about Requirements to the IOTC Secretariat.
- **Report Submissions**: Manage means the user can do everything; Edit means they can prepare and save draft Report submissions, and ask for their approval; Submit means

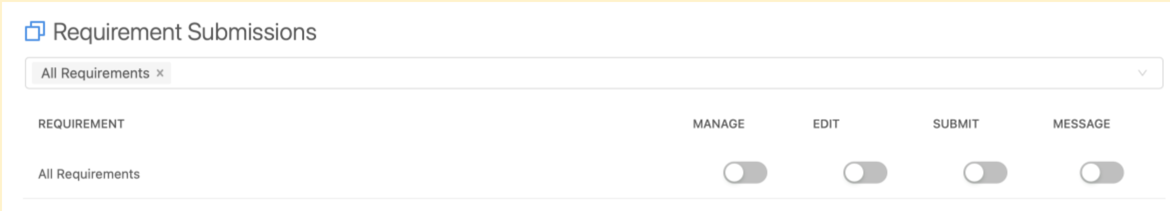
they can directly submit a Report to the IOTC Secretariat; Message means the User can send messages about Reports to the IOTC Secretariat.

STEP 4: **Once done, press the blue "Save" button** on the top right of the screen.

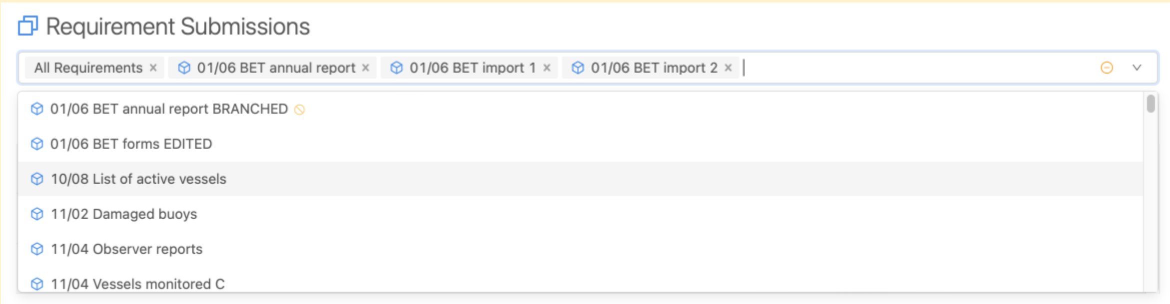
Assigning Permissions to a User on specific Requirements or Reports

If you want to assign specific Users to work on specific Requirements ,you can do so in the Permissions screen:

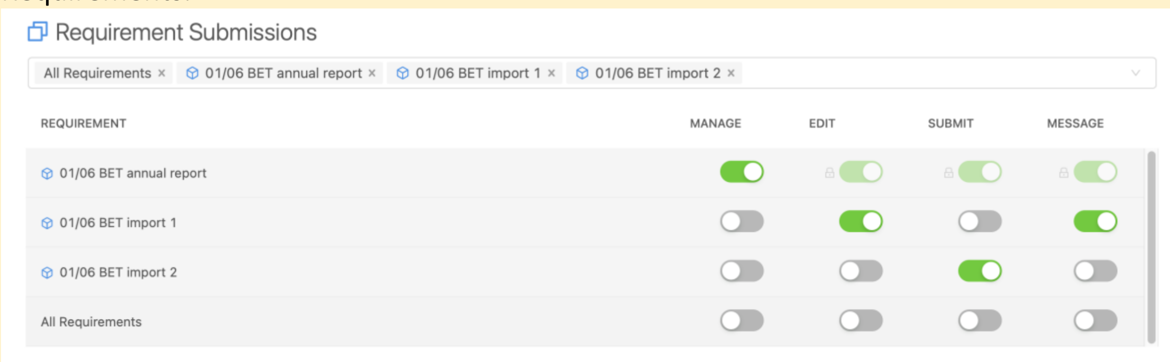
STEP 1: **Turn all permissions for "All requirements" to OFF**



STEP 2: **Select the relevant requirements by clicking in the drop-down list.**



STEP 3: **Define what permissions the User should have** for each of the selected Requirements.



STEP 4: **Once done, press the blue "Save" button** on the top right of the screen.

Note: The same process applies to Reports.

Activate a User and create their Account

Once a User has been created, when it is time to allow them to use the application, it needs to be Activated and their Account created.

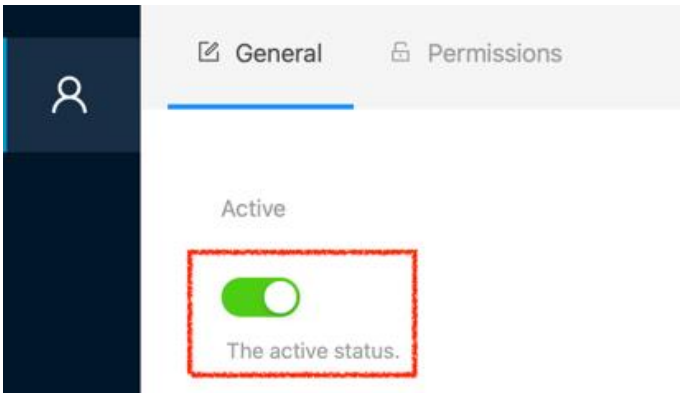
User vs Account: what is the difference?

In e-MARIS, there are two notions related to people: **Users** and **Accounts**.

- **Users**: A User is created in e-MARIS and has a number of details attached to it, such as name, email address, Party to which it belongs etc. A User can exist in an Inactive state, for example while you are preparing all a Party's users and want to activate them later all at once. Until the User is toggled to Active, it cannot create its Account and will not receive email notifications.

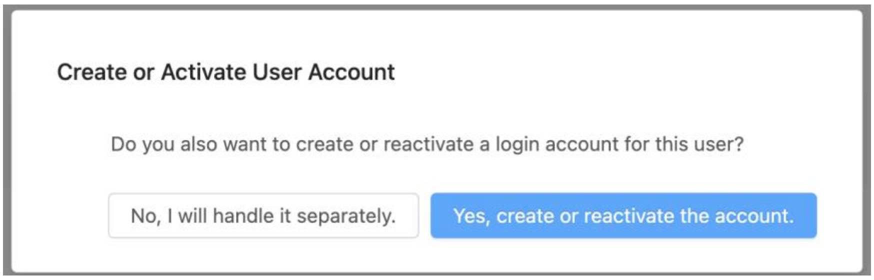
- **Accounts**: To be able to log in to e-MARIS to use the application, a User needs to create its Account, which is triggered when it defines its password. Once the Account has been created, the User will be able to log in to e-MARIS and use the application

STEP 1: **Toggle a User's "Active" state to ON.**



STEP 2: **Press the blue "Save" button** on the top right of the screen.

STEP 3: **Confirm the activation of the User Account**



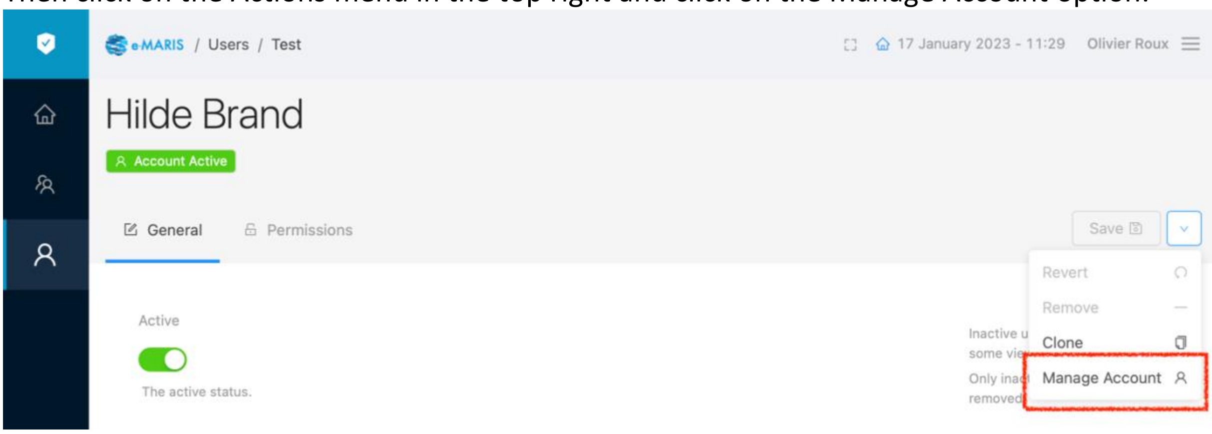
Click "Yes, create or reactivate the account" and the User will receive an email, inviting them to set their password to create or activate their account.

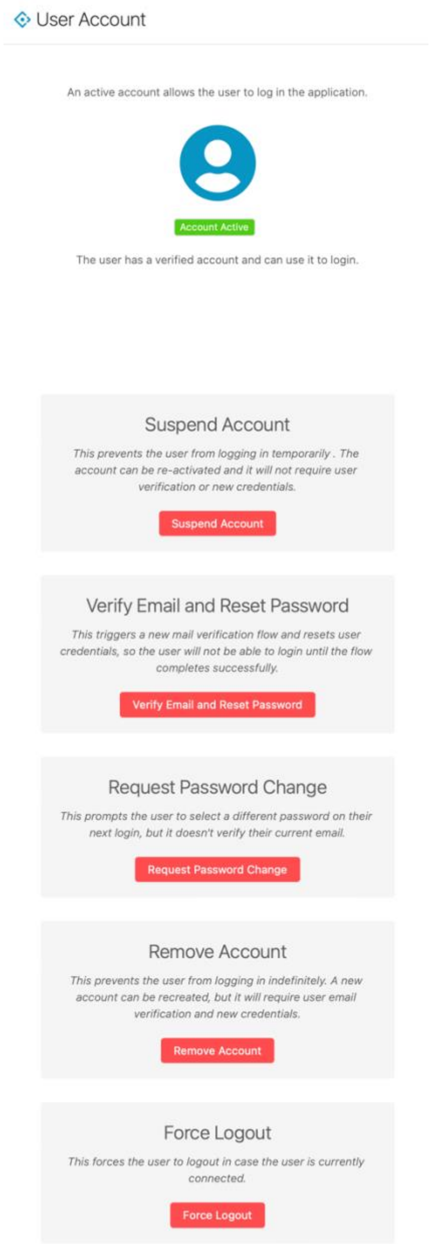
Managing a User Account

There are a number of operations that can be performed on a User Account, for example if the user has not activated their account in time and their activation link in the email they received has expired, or you want to force a user to change their password.

For this, open the Admin Console, then click open the relevant user (from the list of users or from a Party's list of users).

Then click on the Actions menu in the top right and click on the Manage Account option:





This opens a drawer with all the account management options:

- At the top, the status account is displayed:
  - **No account**: an account has not been created for this user
  - **Account not verified**: the user has not yet activated their account
  - **Account active**: the user has activated their account and can use e-MARIS
  - **Account suspended**: the user's account has been temporarily suspended by an admin or a CPC manager, and the user cannot log in until the account is reactivated.
- Below are the various account management options, depending on the status of the account:
  - **Resend verification email:** if the user has never activated their account, this resends the activation email
  - **Create account** (if the account hasn't been created yet): this creates the account and sends an account activation email to the user
  - **Suspend account** (if the account is Active): allows to temporarily prevent the user from logging into e-MARIS
  - **Reactivate account** (if the account is Suspended): reactivates a suspended account, allowing the user to resume using e-MARIS
  - **Verify email and reset password**: this sends a Reset password email to the user (can be used if the user has never activated their account yet)
  - **Request password change**: the next time the user logs in to e-MARIS< they will be forced to change their password
  - **Remove account**: this will remove the account and the user will never be able to log in again, unless a new account is created (see " Deactivating or Deleting a User" below)
  - **Force logout**: this immediately disconnects the user from e-MARIS.

Deactivating or Deleting a User

If an existing User is no longer needed (e.g. the person left your organization or has simply changed duties) or you want to prevent them from using e-MARIS, *we recommend you to simply **Deactivate** the User*. It will remain in the list of Users but will not be able to log into e-MARIS, use the application or receive notification emails:

Open User → Toggle "Active" to OFF → Save → Confirm

If you really want to **Delete** a User, maybe because it was created by mistake, you can do so by following the procedure below:

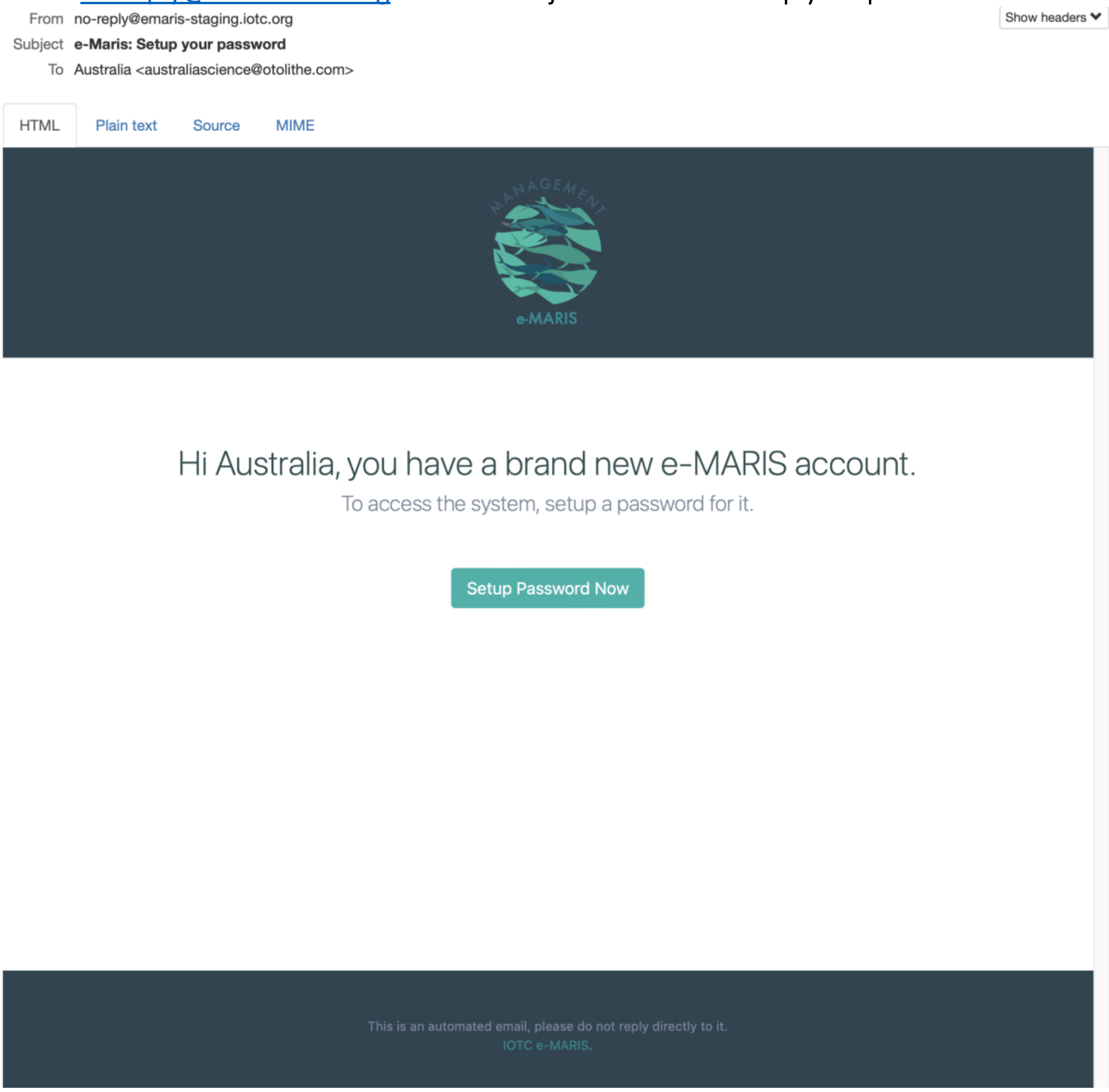
Open User → Toggle "Active" to OFF → Save → Confirm → Select "Remove User" → Confirm

Note that any content already created by this User (e.g. submission of requirements or reports) will *not be deleted.*

Setting up your password and accessing e-MARIS for the first time

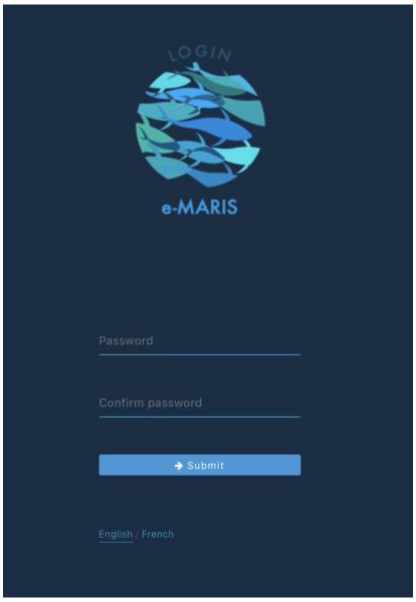
When a user's account is created (or reactivated if it had been suspended), they will receive an email inviting them to set their password to create or activate their account.

STEP 1: **Open the email:** in your email client or web browser, open the email received from no-reply@emaris.iotc.org with the Subject: "e-Maris: Setup your password".

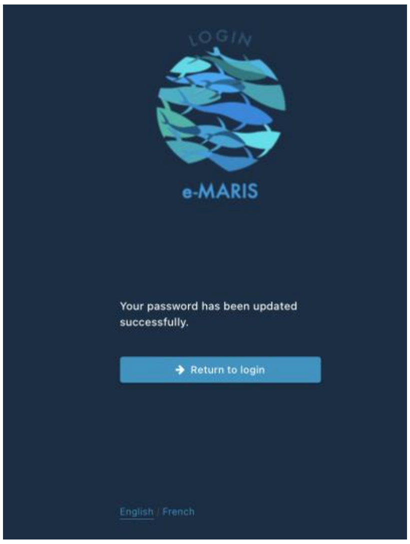


STEP 2: Click on the "**Setup Password Now**" button in the email to open e-MARIS.

STEP 3: **Enter your chosen password** (must be between 8 and 256 characters in length) twice on this screen, then press "Submit". Note that you can switch the login screen between English and French by clicking the links at the bottom.



STEP 4: If your password was successfully created, the application will display a confirmation screen.



STEP 5: **Click the "Return to login" button** and the Login screen will be displayed.

STEP 6: **Type in your email (or username) and password**, then click "Submit". Note: if you cannot remember your password, click on the "Forgot your password?" link follow the instructions.

STEP 7: **You are now logged in to e-MARIS** and your CPC Dashboard is displayed.