e-Maris Quick Start series for CPCs: The Dashboard
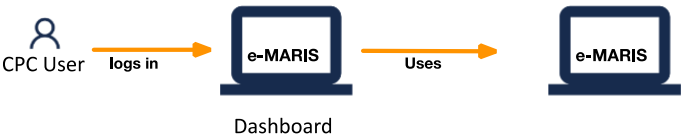
Updated: 23/05/2024 11:44:00

What is this guide about?

This quick start guide will give you a quick tour of the e-MARIS Dashboard, which is your central hub for using e-MARIS.

Overall workflow covered in this guide:

The details on how to manage your CPC and users, and submit reporting requirements in e-MARIS are provided in dedicated Quick Start guides.
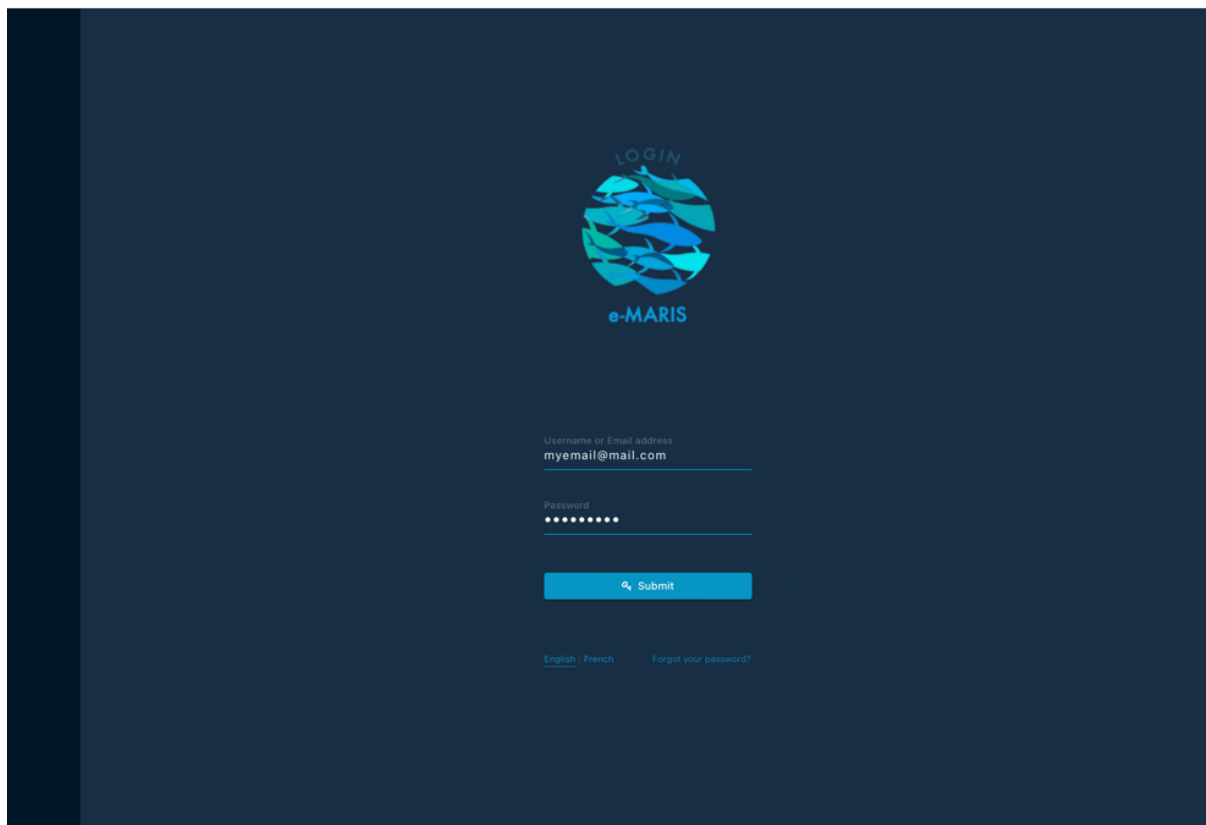
CONTENT

Accessing the Dashboard

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".
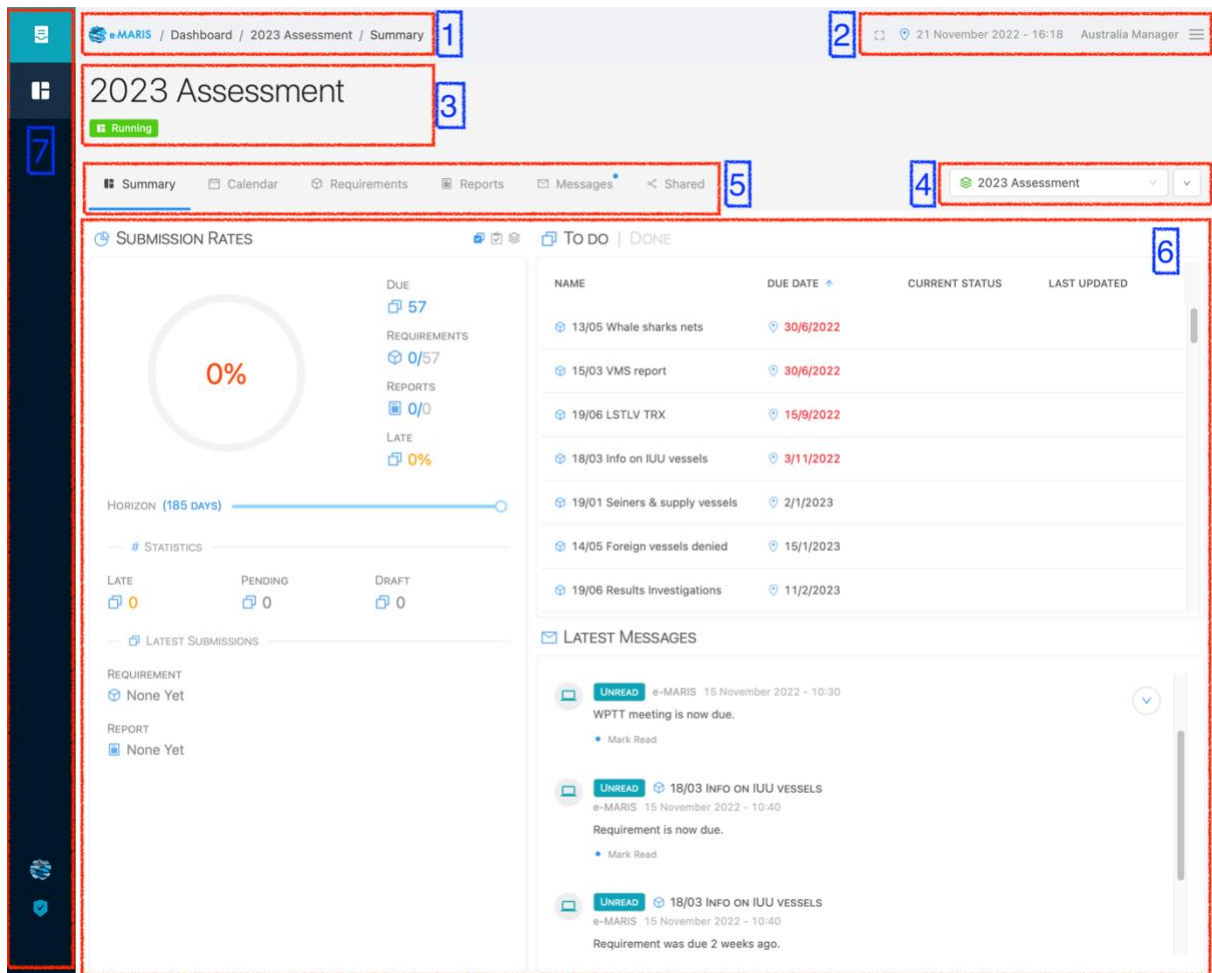

Note that once connected, the application will keep you logged in for several days, unless you log out manually.
Once logged in, you will land on your CPC's Dashboard.

STEP 2: See the sections below to learn about the Dashboard.

The e-MARIS Dashboard in a nutshell

The e-MARIS Dashboard is your central hub for all the IOTC Reporting Requirements.
It is made of the following components:

1. The **Location bar**: this shows you where you are in e-MARIS, and you can click on it to quickly navigate back to a higher level.
2. The **Status bar**: this shows you the time in your selected time zone, the name of the user you are connected as, as well as two action buttons, **Focus Mode** and **User Menu** (see below).
3. The **Current Campaign**: this shows you the name of the campaign you are currently viewing in the Dashboard, and whether it is running, suspended, ended or archived.

Campaign status

In e-MARIS, a campaign can be in several states:

- **Running**: this means you can submit information in the campaign;
- **Suspended:** this means that the Secretariat has temporarily suspended submissions, so you cannot submit information until the campaign is resumed;
- **Ended**: this means the campaign is over and no submission is accepted anymore, but the Secretariat can still produce reports etc.
- **Archived:** this means that a campaign that has ended has now been moved to long-term storage and cannot be modified anymore, even by Secretariat users.

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4. The **Campaign Switcher**: this allows you to switch the Dashboard to another campaign (see below).
5. The **Dashboard Tabs Bar**: Click on any of the tabs to consult their content (see below):

a. **Summary**: the default display for the Dashboard, showing you a high level view of the campaign;
b. **Calendar**: a calendar showing all the campaign events: meetings, requirement deadlines and submissions etc.
c. **Requirements**: a list of all the reporting requirements for this campaign.
d. **Reports**: a list of all the reports to be produced for this campaign (includes the Implementation Report, Compliance Questionnaire and Compliance Report).
e. **Messages**: a global inbox of all messages sent by e-MARIS, the IOTC Secretariat or your users.
f. **Shared**: a list of reports from other CPCs, shared with you by the IOTC Secretariat, as needed.
6. The **Content**: changes depending on the tab you are in (see below).
7. The **Sidebar**: Shows you in which application you are (top icon) and allows you to switch to the Administration Console ( ) or to open the IOTC website ( ).

Always use the latest version of e-MARIS

When a new version of e-MARIS is available, the application will notify you by displaying a red button at the top of the window:
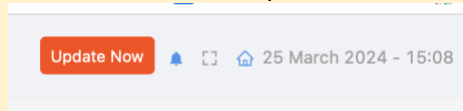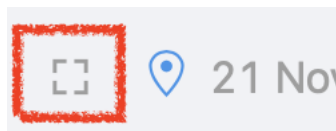

To be sure to be using the latest version of the application, save your work then click the "Update now" button or reload the browser page.
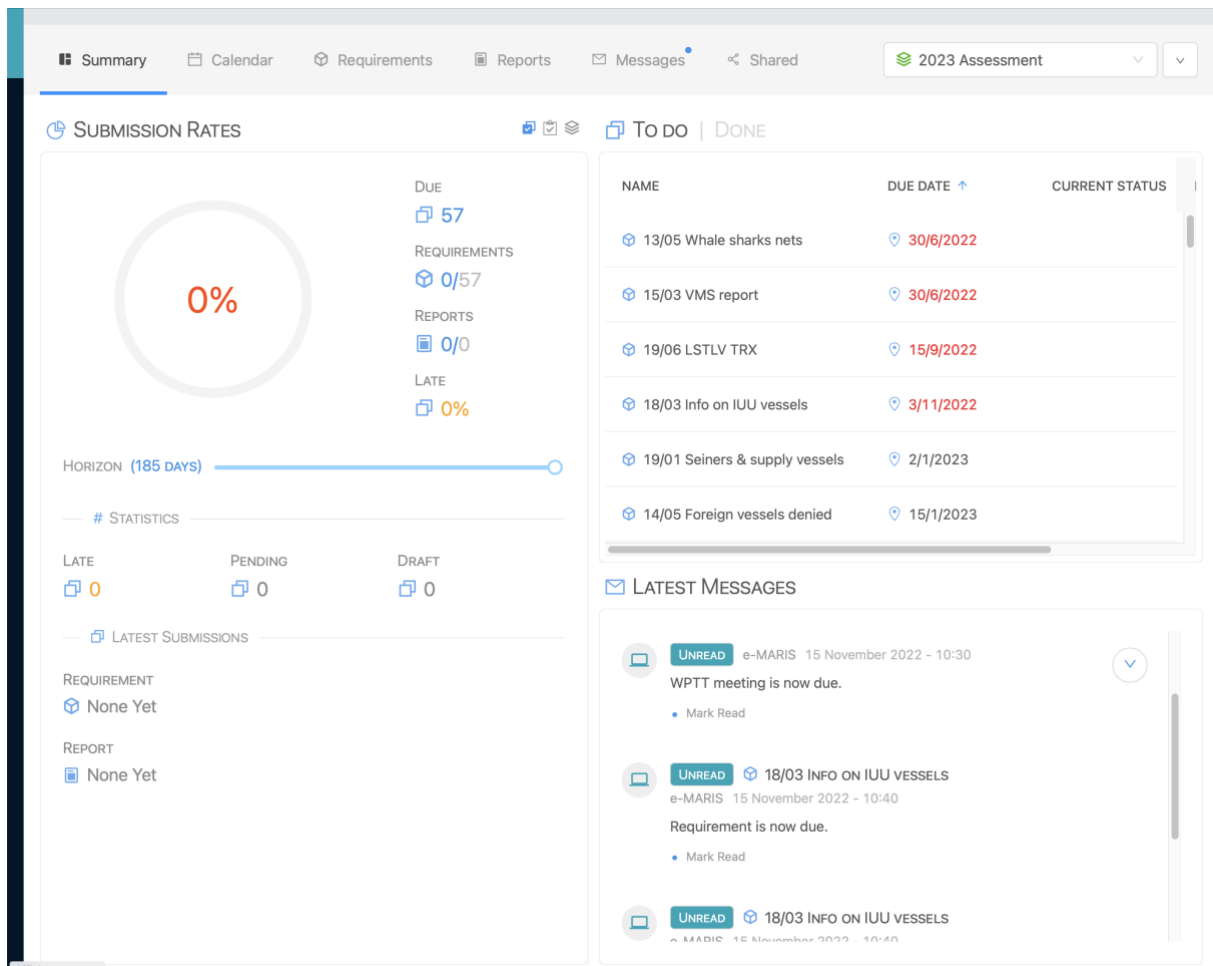

Details on some of the Dashboard features

### The Status Bar

Focus mode

Click the **Focus Mode** button and the left sidebar and top section will hide away, allowing you to see more content (useful on small laptop screens). Move your mouse cursor to the left or the top of the screen to see them reappear. Click the Focus Mode button again to turn this mode off.

Hiding Summary sections to free up space

If you work on a small computer screen (or maybe a tablet), you might not have enough space to comfortably display all the Dashboard Summary sections.
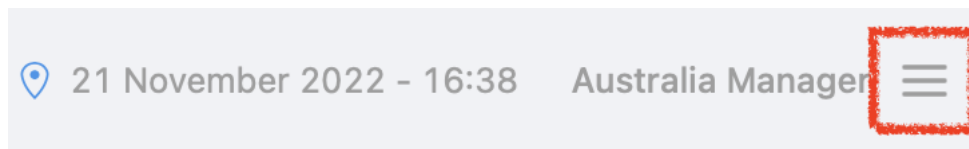
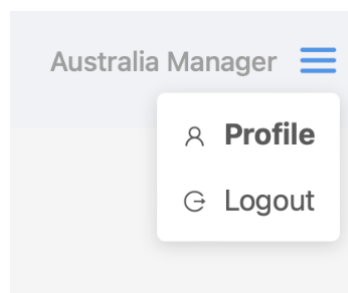Simply click on the icon to the left of the title of the section you want to hide:
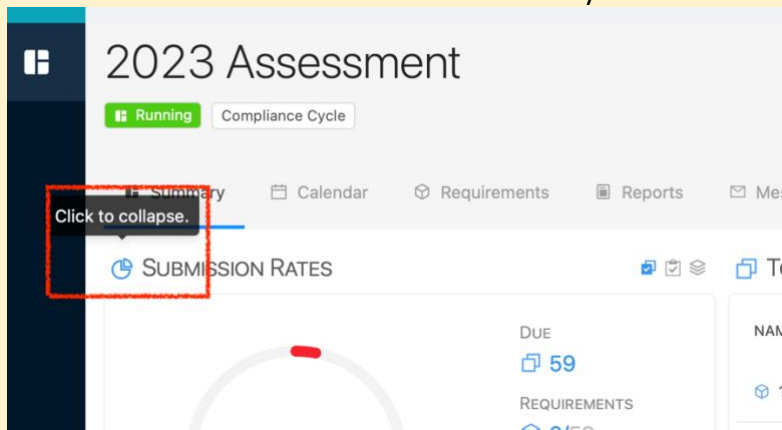
And it will be collapsed on itself, freeing space for the other sections.

To show the section again, simply click on its title icon.

User menu

Click this icon to open the **User Menu**, where you have options to open your Profile or Logout of e-MARIS.

- **Profile**: this gives you some information about your user profile, including:
    - **Details:** information about you, such as your Name, username and email, and allows you to edit this information with the "**Edit**" button below;
    - **Party**: the Party to which you belong;
    - **I am**: what type of user you are (always "User" for CPCs)
    - **I can**: The permissions you have in e-MARIS;
    - **Language**: the language in which you are currently using e-MARIS, which you can change temporarily here (or permanently by editing your profile above);
    - **Mail**: clicking this button allows you to have e-MARIS send you a test email, for example to verify you are receiving e-MARIS emails correctly.

- **Logout**: clicking this button will disconnect you from e-MARIS, requiring you to log in again the next time you want to use the application.

The Campaign Switcher

The Campaign Switcher shows you the name of the campaign currently displayed in the Dashboard.
Click on it to display a list of the other available campaigns.
Click on a campaign to display it in the Dashboard.
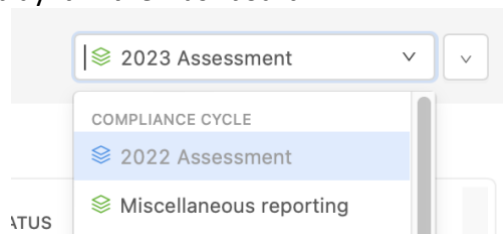
Currently running campaigns are displayed in black text, while past campaigns that are closed are displayed in grey.

The Dashboard Tabs

Summary

The default display for the Dashboard, showing you a high-level view of the campaign. The Summary tab offers four components.

- The **Statistics box**: It shows you statistics relevant to your situation in the campaign, in terms of Submission rates (⬚), Compliance Rates (⬚) and Progress (⬚). Click on the relevant icon to switch between displays; it also shows you the latest submissions in terms of requirements and reports.
- The **TO DO List**: It shows you a list of the requirements you are still to submit, sorted by closest deadline; requirements for which you are late are displayed in red. Click on a requirement to open it for edition and submission.

NAME	DUE DATE ↑	CURRENT STATUS	LAST UPDATED
13/05 Whale sharks nets	30/6/2022		
15/03 VMS report	30/6/2022	✎ Draft	⏱ a few seconds ago
19/06 LSTLV TRX	15/9/2022		
18/03 Info on IUU vessels	3/11/2022		
19/01 Seiners & supply vessels	2/1/2023		
14/05 Foreign vessels denied	15/1/2023		
19/06 Results Investigations	11/2/2023		
14/05 Foreign vessels licensed	15/2/2023		

If you click on the "**DONE**" button on the right of "**TO DO**", you will see a list of requirements you have already submitted.
Note: Click on any of the column titles to change the sorting order.

NAME	DUE DATE ↑	TIMELINESS	LAST SUBMITTED	COMPLIANCE	CURRENT STATUS
13/05 Whale sharks nets	30/6/2021	⏱ On Time	⏱ 2/6/2021	● ● ●	⧉ Submitted
15/03 VMS report	30/6/2021	⏱ Late	⏱ 8/11/2021	● ● ●	✎ Draft
19/06 LSTLV TRX	15/9/2021	⏱ On Time	⏱ 7/9/2021	● ○ ○	⧉ Submitted
19/01 Seiners & supply vessels	1/1/2022	⏱ On Time	⏱ 17/6/2022	● ○ ○	⧉ Submitted
14/05 Foreign vessels denied	15/1/2022	⏱ Late	⏱ 22/6/2022	● ● ●	⧉ Submitted
14/05 Foreign vessels licensed	15/2/2022	⏱ On Time	⏱ 19/1/2022	● ○ ○	⧉ Submitted
19/07 Charter Agreements	28/2/2022	⏱ On Time	⏱ 8/3/2022	● ● ●	⧉ Submitted
19/06 Results Investigations	28/2/2022	⏱ On Time	⏱ 2/11/2021	● ● ○	✎ Draft

- **Latest Messages**: This shows you a list of recent messages received or sent (from e-MARIS, from the IOTC Secretariat staff or from you).
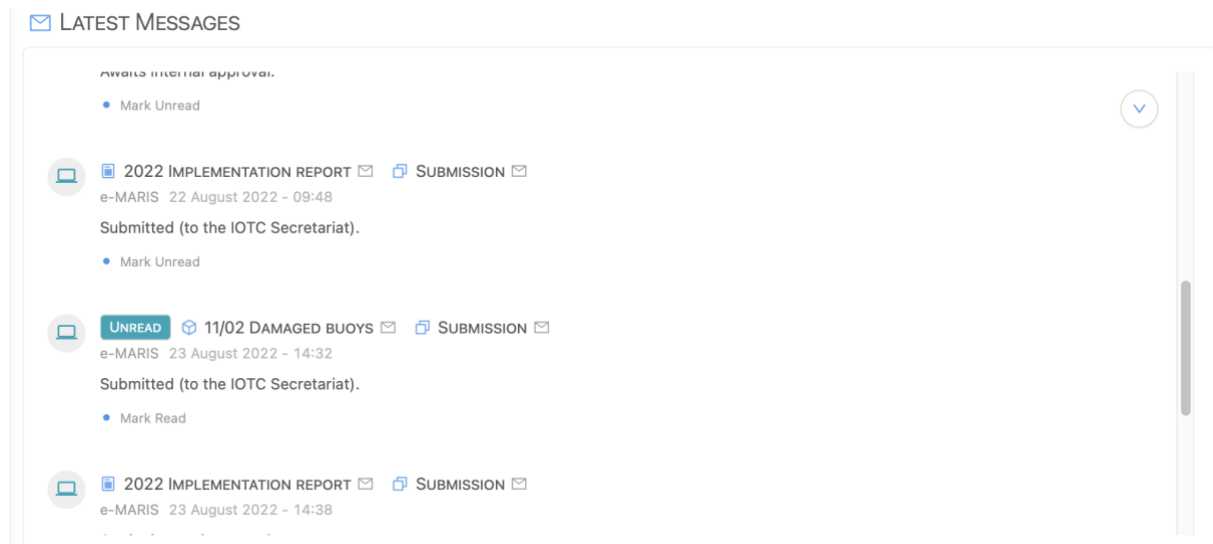
Click on the title bar of the message to display the relevant requirement, report or submission.
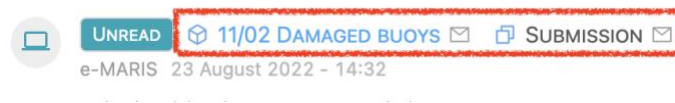
The ⌄ icon in the top right allows you to go back to the most recent message if you have scrolled up in the list of messages.

Calendar

A calendar showing all the campaign events: meetings, requirement deadlines and submissions etc.

Two views are available: **List View** and **Monthly View** (you can define your favourite view by editing your Profile). Both are displayed focussed on the current month.You can use the view switcher to select another view:
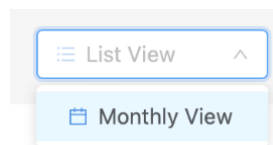
- **List View**: It shows you all the events for the whole campaign, sorted in chronological order.

- **Monthly View**: It shows you all the events in a given month, and you can navigate between months using the left (previous month) and right (next month) arrow icons, of the dots at the bottom (direct access).

Click on the title of any requirement or report to open it.

Deadlines, submission dates and time zones in e-MARIS

As per the IOTC Compliance process, *deadlines for submission of required information and report have always been defined in the IOTC Secretariat time zone, i.e. UTC+4*.

In order to facilitate the work of CPCs, e-MARIS allows you to see a deadline (or any other date) in several time zones: your "**current**" zone (based on your current geographical location, as determined by your computer IP address –*which can be incorrect if you use a VPN*), your "**home**" zone (defined in your user settings), the "**campaign**" zone (defined as Seychelles or UTC+4) and the "**UTC**" zone (i.e. GMT).

All deadlines and dates are displayed in the **Preferred time** zone defined in your User profile.

Preferred time zone

Use Current Location ⌄

Select one zone.

Be aware that deadlines are generally defined as "*before the end of the day in Seychelles*", meaning that 13/02/2023 means "13/02/2023 23:59 UTC+4".

You can see the **date and time** of a deadline or submission date by hovering your mouse above the date. A tooltip will show you the date and time in the various time zones (example with current and home time zones being Paris, or UTC+1):

CURRENT
13 February 2023 – 20:59
HOME
13 February 2023 – 20:59
CAMPAIGN
13 February 2023 – 23:59
UTC
13 February 2023 – 19:59

202   ⌂ 13/2/2023
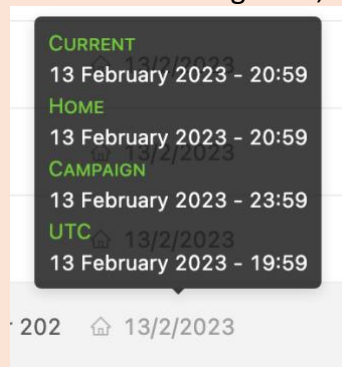
This explains why you might see a deadline of 13/02/2023, submit on 13/02/2023 at 21:09 in your own time zone, and see a timeliness assessed as Late.

📄 Compliance Questionnaire for 202   ⌂ 13/2/2023   ⏱ Late   🕐 13/2/2023

This is because in that case the deadline (13/02/2023 23:59 UTC+4) converted to your time zone is 13/02/2023 20:59 UTC+1, and you submitted on 13/02/2023 21:09 UTC+4, 10' after the deadline.

CURRENT
13 February 2023 – 21:09
HOME
13 February 2023 – 21:09
CAMPAIGN
14 February 2023 – 00:09
UTC
13 February 2023 – 20:09

🕐 13/2/2023

Requirements

A list of all the reporting requirements (or reports) for this campaign.

This list offers you the following information:

- **Name**: the short name of the requirement; click on it to open the requirement.
- **Due date**: the deadline for submitting this requirement.
- **Timeliness**: the timeliness of your submission: a) for submitted requirements, whether they were submitted on time or not; or b) for requirement not submitted yet, whether they are late or not.
- **Last submitted**: the date of last submission of the requirement.
- **Compliance**: the compliance assessment score for this requirement, given by the IOTC Secretariat staff (e.g. "Partially compliant").
- **Current status**: the status of the requirement submission (e.g. "Draft").
- **Last updated**: when the submission was last updated (i.e. saved as a draft, submitted, assessed etc).
- **Versions**: the number of versions submitted for this requirement (e.g. "2" if you submitted a first time, then submitted a revised version).

Submission badges

e-MARIS used visual badges to give at glance information on requirement submissions.

Timeliness:

- ⊙ TBC : the requirement timeliness is not available (e.g. the requirement has no due date or the requirement has a due date in the future and has not been submitted yet);

- ⊙ On Time : the requirement was submitted on time (i.e. before the deadline)

- ⊙ Late : the deadline for the requirement has passed and the requirement was submitted after the deadline or not submitted at all.

- **Missing**: the deadline for the requirement has passed, the requirement has not been submitted and the IOTC Secretariat section has definitively marked it as missing.

Current Status:

- **Draft**: there is a requirement saved as a draft, but it hasn't been submitted yet
- **Pending**: this requirement is awaiting internal approval by a Party manager
- **Submitted**: this requirement has been submitted to the IOTC Secretariat.

Searching and filtering

On e-MARIS screens showing you list of items, you can usually search or filter them using the Filter bar at the top of the list.

| 26 | search ... 🔍 | 🗇 Status | ☑ Compliance | 🕐 Timeliness | 🕐 Due Date |

It shows you:

- **Number of items** currently displayed
- **Text box**: enter any text to search the list for matching results
- **Contextual filter menus**: these are displayed depending on the list you are looking at, and clicking one shows you the available values, which you can select or deselect.

When you apply some filters, the list of matching results and the number of results update in real time.

2	bet 🔍	🗇 Status	☑ Compliance	🕐 Timeliness	🕐 Due Date	⊖
NAME	DUE DATE ↑	TIMELINESS	LAST SUBMITTED	COMPLIANCE	CURRENT STATUS	LAST UPDATED	VERSIONS
🎯 01/06 BET annual report	No Due Date	🕐 On Time	🕐 31/3/2022	🟢 🟢 🟢	🗇 Submitted	🕐 5 months ago	1
🎯 01/06 BET forms EDITED	No Due Date	🕐 On Time	🕐 24/6/2022	🟢 🟢 🟢	🗇 Submitted	🕐 4 months ago	1

To reset all filters, simply click on the "-" icon on the right.

| 🕐 Due Date | ⊖ |
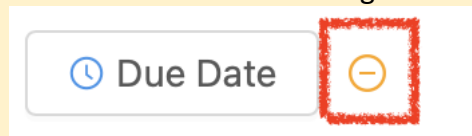
Note: Selecting several entries in the same filter applies an "OR" logic while selecting entries in separate filters applies an "AND" logic (e.g. Typing "BET" in the text field then selecting "Compliant; Partially compliant" in the Compliance filter as well as "On time" in the Timeliness filter will show all submissions related to BET, assessed as Compliant or Partially compliant and that have been submitted on time.

Reports

A list of all the reports to be produced for this campaign (includes the Implementation Report, Compliance Questionnaire and Compliance Report).
The features are identical to those of the Requirements tab (see above).

Messages

A global inbox of all messages sent by e-MARIS, the IOTC Secretariat or your users.

The behaviour of this list of messages is similar to the Latest Messages in the Summary tab (see above).

There are several types of messages in e-MARIS:

- **Campaign events**: messages that inform you of the start of the campaign, or of approaching meetings etc.
- **Reminders**: these are messages sent by the system to remind users of a deadline (they can be setup by the IOTC Secretariat staff at various points in time before a deadline).
- **Submission events**: messages sent when you submit a requirement, request approval for a requirement submission, when the IOTC Secretariat staff gives a compliance assessment to a submission etc.
- **Messages from people**: these are messages sent by CPC users to IOTC Secretariat or by IOTC Secretariat to CPC users.

In the Messages tab, you can directly send a general message to the IOTC Secretariat, for example asking a question about the current campaign. Simply type your message in the message box and press the "**Send**" button.
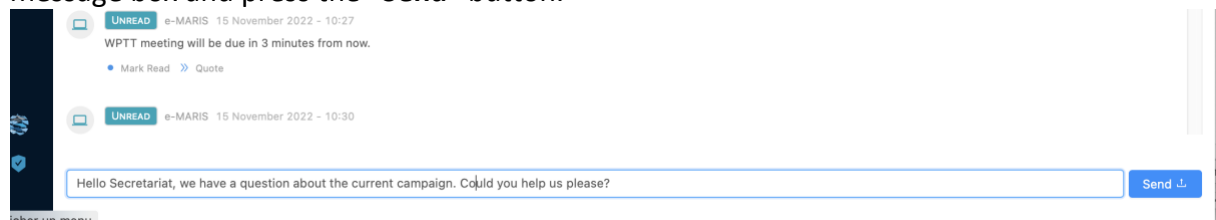
The message will appear in your Messages tab and will be sent to the IOTC Secretariat staff.
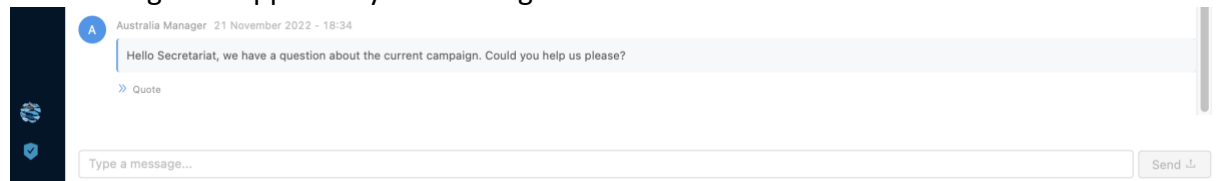
Marking a message as Read

Messages received are marked with an **UNREAD** badge:
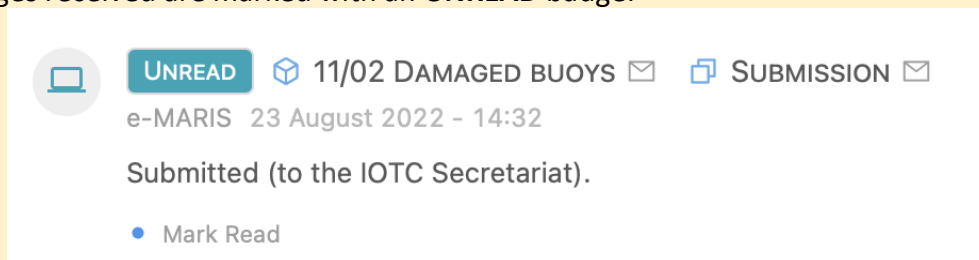
If you click the "**Mark Read**" button at the bottom of the message, it will mark it as Read (UNREAD badge will be removed) for all users of your Party: this is a way of telling them: "This message has been acknowledged and any required action taken", so they know that they don't need to take action in relation to this message.

Shared

A list of reports from other CPCs, shared with you by the IOTC Secretariat, as needed.

PARTY ↑	NAME	VERSION	DUE DATE	TIMELINESS	SUBMITTED	PUBLISHED	FILES
⚞ Australia	▦ 2022 CR	▢ IOTC-2023-CoC20-CR-Australia		⊙ TBC	⬚ 5 months ago	⊙ 5 months ago	▢ FR ▢ EN
⚞ Australia	▦ 2022 Implementation report		⊙ Due 7 months ago	⊙ On Time	⬚ 6 months ago	⊙ a year ago	▢ EN
⚞ Australia	▦ 2022 Implementation report	▢ IOTC-2023-CoC20-IR-Australia	⊙ Due 7 months ago	⊙ Late	⬚ 5 months ago	⊙ 5 months ago	▢ FR ▢ EN
⚞ Australia	▦ 2022 Implementation report	▢ REV2	⊙ Due 7 months ago	⊙ On Time	⬚ 6 months ago	⊙ 6 months ago	▢ EN ▢ FR
⚞ Comoros	▦ 2022 Implementation report	▢ FIRST_VERSION	⊙ Due 7 months ago	⊙ Late	⬚ 6 months ago	⊙ 7 months ago	▢ FR
⚞ Eritrea	▦ 2022 Implementation report		⊙ Due 7 months ago	⊙ On Time	⬚ 6 months ago	⊙ 7 months ago	▢ EN

In the context of the IOTC Compliance process, various reports submitted by CPCs or the IOTC Secretariat Compliance section (such as the Implementation Report, Compliance Questionnaires or Compliance Report) are shared with all the CPCs once finalised.

This can be done within e-MARIS, and all reports shared with you (or from you) will appear in this tab.

The following information is available:

- **Party**: the CPC related to the report;
- **Name**: the name of the report;
- **Version**: the version of the report (for example, there might be several revisions made to the Implementation report of a given CPC, then shared by the Secretariat).
- **Due date**, **Timeliness** and **Submitted**: the date at which the report was due and whether it was submitted on time or not, along with the date of submission.
- **Published**: the date at which the report was published (including translation) and shared by the IOTC Secretariat.
- **Files**: links to download the report in the available language(s), in PDF format.