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

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What is this guide about?

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

Overall workflow covered in this guide:

CONTENT

Signing-in to the e-RAV

STEP 1: Open the e-RAV URL in your web browser:
http://rav.iotc.org,
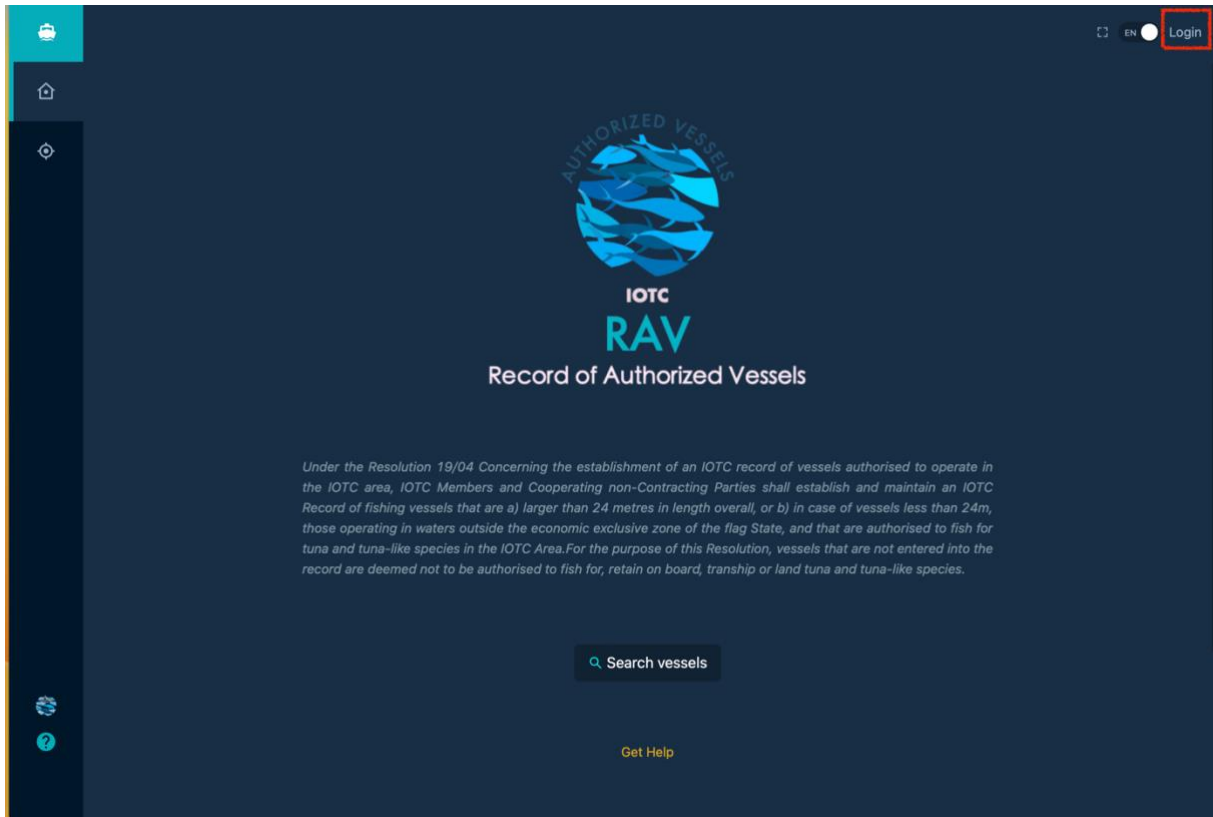
STEP 2: Log in:
click on the "Login" button in the top right corner and enter your username or email and
password in the login screen, then click "Submit".

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 e-RAV home page.

Configure your Party's e-RAV profile

STEP 1: **Open your Party's profile** by clicking on the Party icon in the left Sidebar.
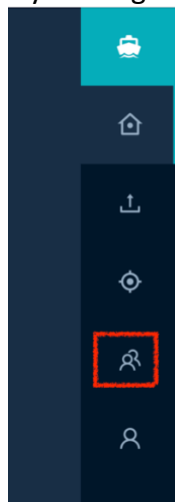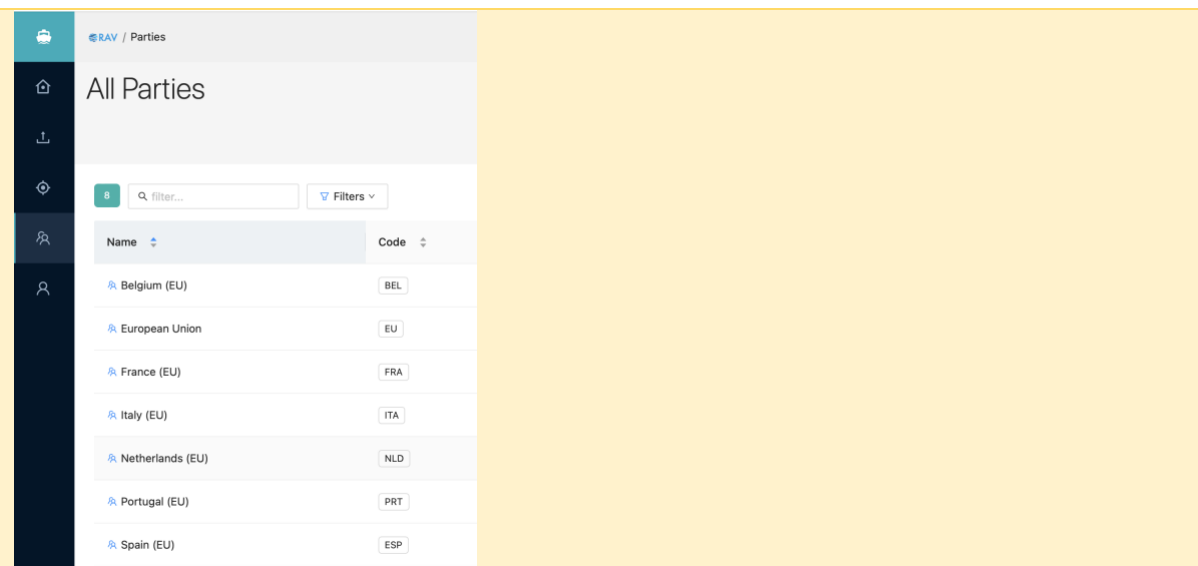

This will open the Party's profile screen.

The special case of the European Union
Since the EU is the contracting party reporting to IOTC information for vessels flying the flags of EU Member States, it is treated slightly differently from other CPCs. Indeed, as an EU Manager, you can manage your own EU party and users, as well as all EU MS parties and users.

Since only EU is reporting vessel data, it is advised to only add users under the European Union party: they will then be able to submit and manage vessel data for individual EU flag states.
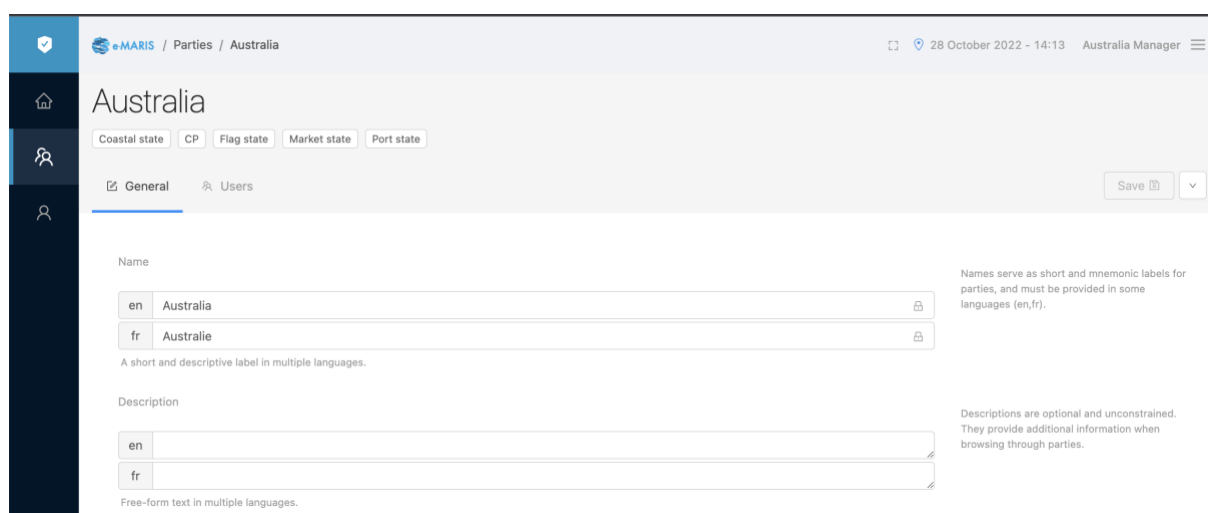

STEP 2:   Edit or set the following information about your Party:
- **Description**: your assigned Party name is short for display purposes, but you can use this field to indicate the full name of your Country.
- **Language**: you can select the default language in which the application will be displayed, applicable to new users (each user can then change that value).
- **Approve Lifecycle**: you can select whether your Party has a process in place where vessel updates must be approved by a manager before submission (see below).

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.
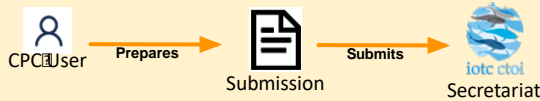
STEP 3: **Once done, click the blue Save button** at the top right of the screen.
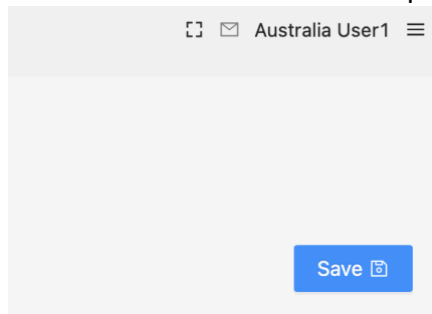
Manage your Party Users

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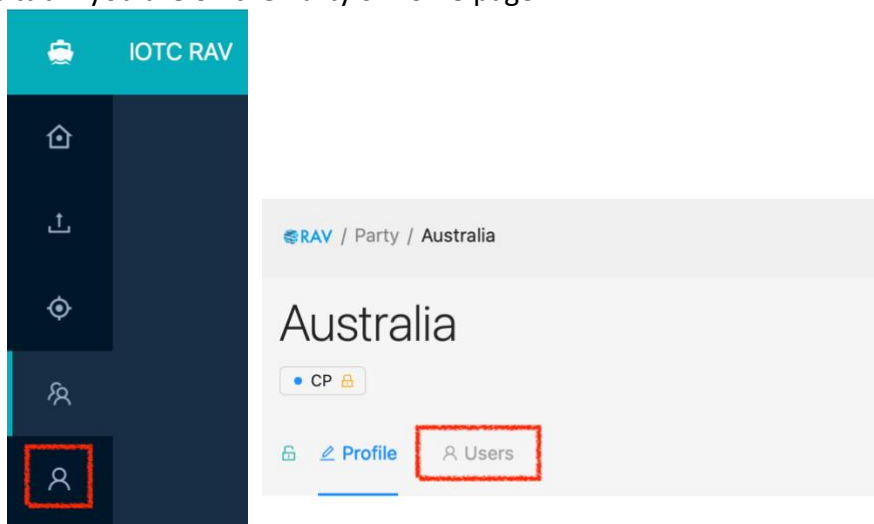
This will open the list of all your Party's Users.

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

| About Users in e-RAV |
| --- |
| Who are e-RAV Users and who should you create one for? |
| Any person who needs to access e-RAV 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 log in and browse content, but not actually submit anything. |

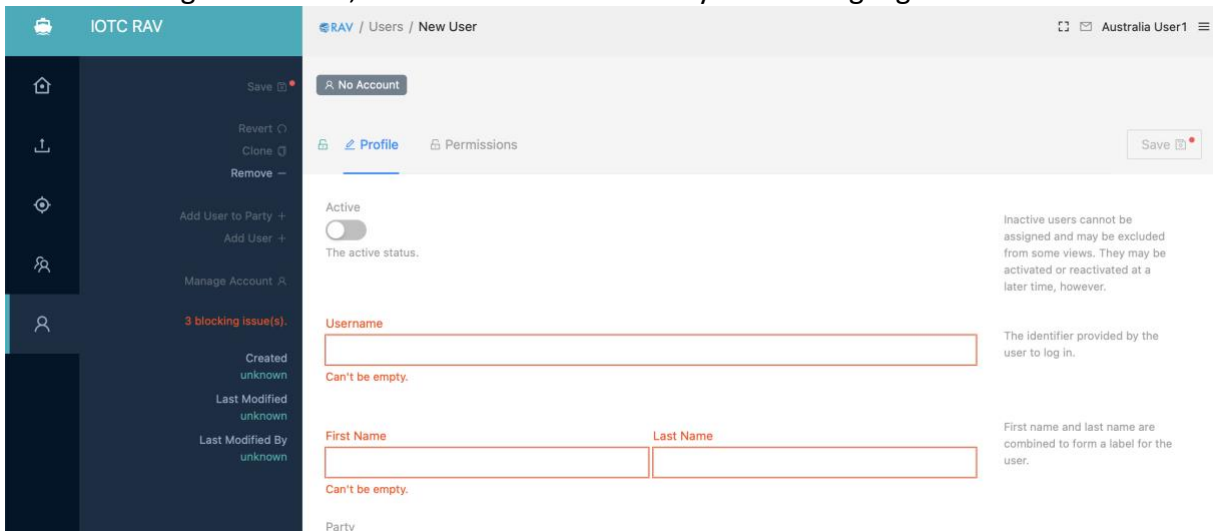**STEP 2:** **See the sections below for what you can do with Users**

Create a new User

STEP 1: **Click on the blue "Add User +" button**
on the top right of the screen in your Party's Profile or Users tab:

or in the Sidebar:
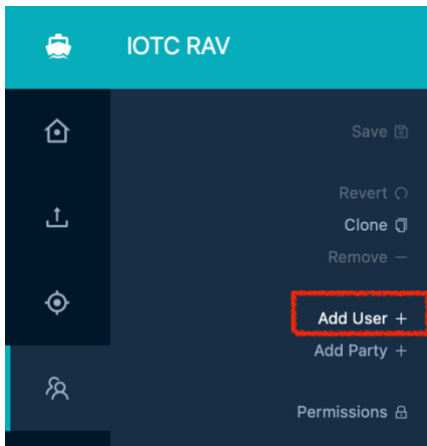
When creating a new User, some fields are mandatory and are highlighted in red.

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-RAV.
- **Username**: this is an internal user name that must be unique across the whole of e-RAV. 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-RAV, but also to receive notifications from the application; it must be unique across the whole of e-RAV.
- **Address**: self-explanatory.
- **Phone**: self-explanatory.
- **Preferred Language**: self-explanatory, by default as set in the Party preferences.
- **Email 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.

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 in the Sidebar on a User's page.
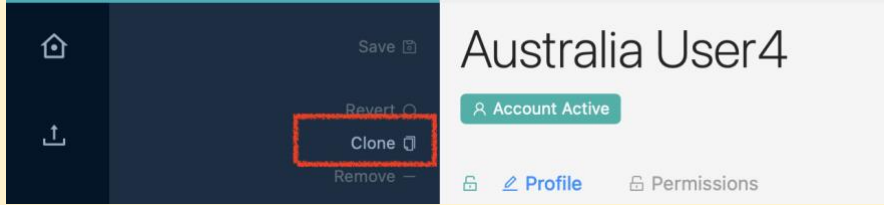
STEP 2: **Click the Clone button**

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

STEP 3: **Change the mandatory field values** (Username, First & Last Name and email, as those have to be unique) 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 or from your Party's Users tab to open it in Edit mode.

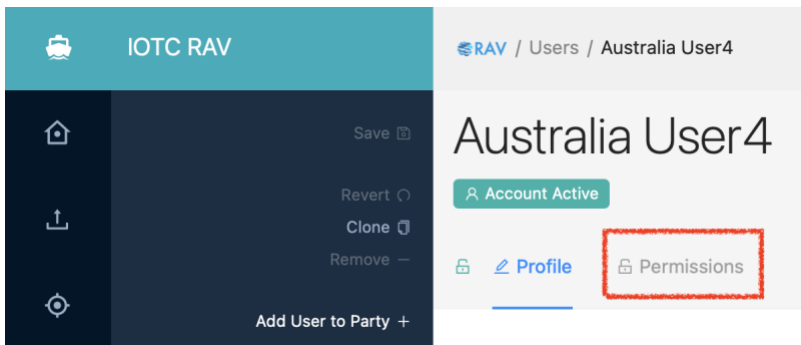**STEP 2:** **Modify the information about the User**, as needed.

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-RAV. 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

- **Manager**: this means the user can Create or Edit Users and can assign Permissions.
- **Submissions**: Manage means the user can do everything; Edit means they can prepare and save draft vessel update submissions, and ask for their approval; Submit means they can directly submit a vessel update submission to the IOTC Secretariat; Approve is implied by Manage and means the user can review submissions sent for approval and submit them to the IOTC Secretariat.

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

The special case of the European Union

Since the EU is the contracting party reporting to IOTC information for vessels flying the flags of EU Member States, it is treated slightly differently from other CPCs.

Indeed, as an EU Manager, you can assign permissions on submissions for individual EU Member States.

When you create an EU user, in the Permissions tab, you **must** give then Manage permissions on "European Union".

Then you can give them permissions on some or all EU Member States in the list, as required. The user will then be able to manage vessel submissions for the select EU Meber States/Flag States.

In the example above, the EU user can manage vessels in the e-RAV for France (EU), Italy (EU) and Netherlands (EU).
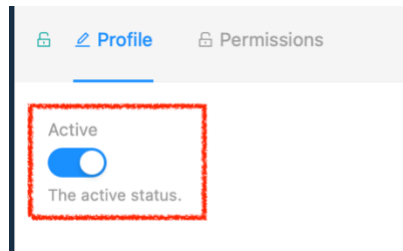
Activate a User and create their Account

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-RAV, there are two notions related to people: **Users** and **Accounts**.

- **Users**: A User is created in e-RAV 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-RAV 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-RAV 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**
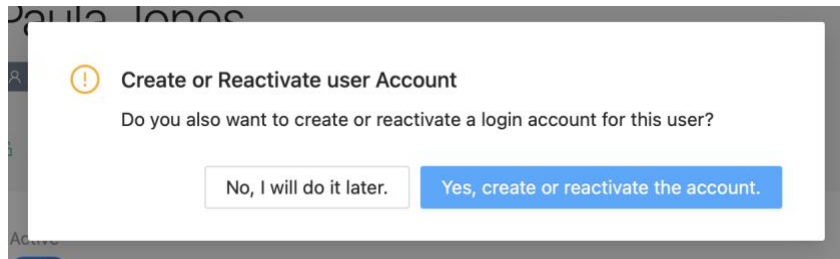
Click "Yes, create or reactivate the account" and the User will receive an email, inviting them to set their password to create or activate their account.

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 relevant user (from the list of users or from a Party's list of users).
Then click on Manage Account button in the Sidebar:
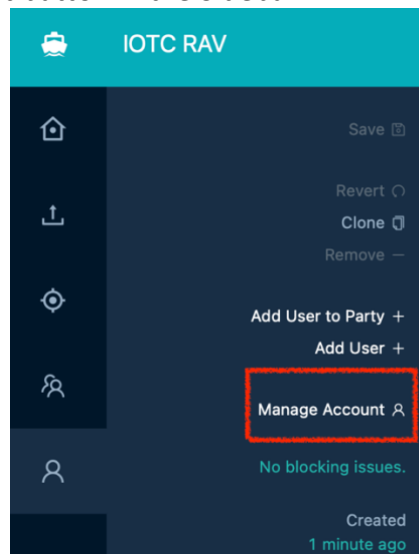
This opens a drawer with all the account management options:

User Account

Account Active

The user has a verified account and can use it to login.

Suspend Account

This prevents the user from logging in temporarily . The account can be re-activated and it will not require user verification or new credentials.

Suspend Account

Verify Email and Reset Password

This triggers a new mail verification flow and resets user credentials, so the user will not be able to login until the flow completes successfully.

Verify Email and Reset Password

Request Password Change

This prompts the user to select a different password on their next login, but it doesn't verify their current email.

Request Password Change

Remove Account

This prevents the user from logging in indefinitely. A new account can be recreated, but it will require user email verification and new credentials.

Remove Account

Force Logout

This forces the user to logout in case the user is currently connected.

Force Logout

- 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-RAV
  - **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-RAV
  - **Reactivate account** (if the account is Suspended): reactivates a suspended account, allowing the user to resume using e-RAV
  - **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-RAV 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-RAV.
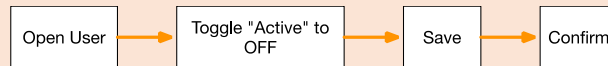
## Setting up your password and accessing e-RAV for the first time

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 "noreply.rav@iotc.org" with the Subject: "RAV: Setup your password".
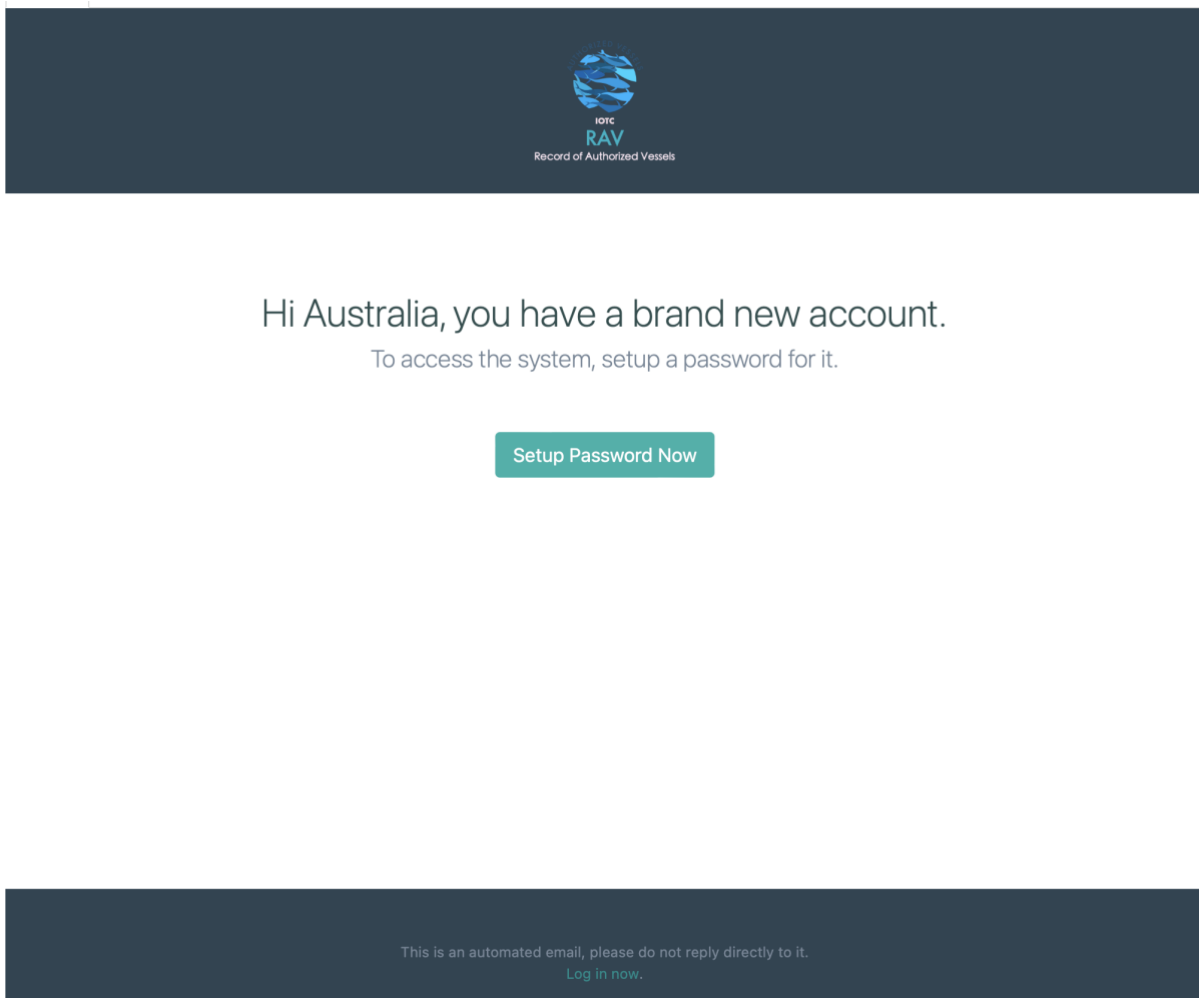

STEP 2: Click on the "**Setup Password Now**" button in the email to open e-MARIS.

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.
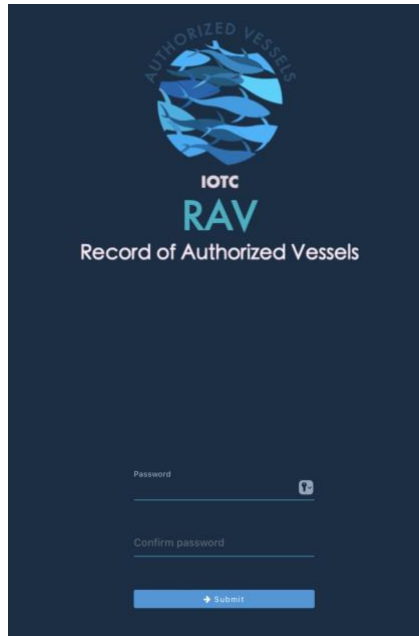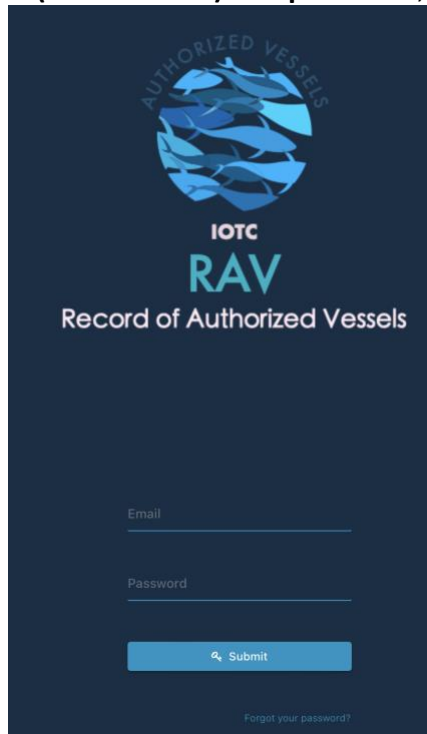
STEP 4: If your password was successfully created, the application will display a confirmation screen.
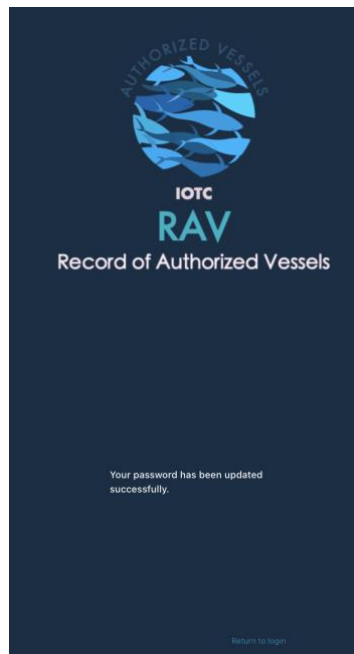
STEP 5: **Click the "Return to login" button** and the main RAV screen will be displayed, then click on the "**Login**" button in the top right.
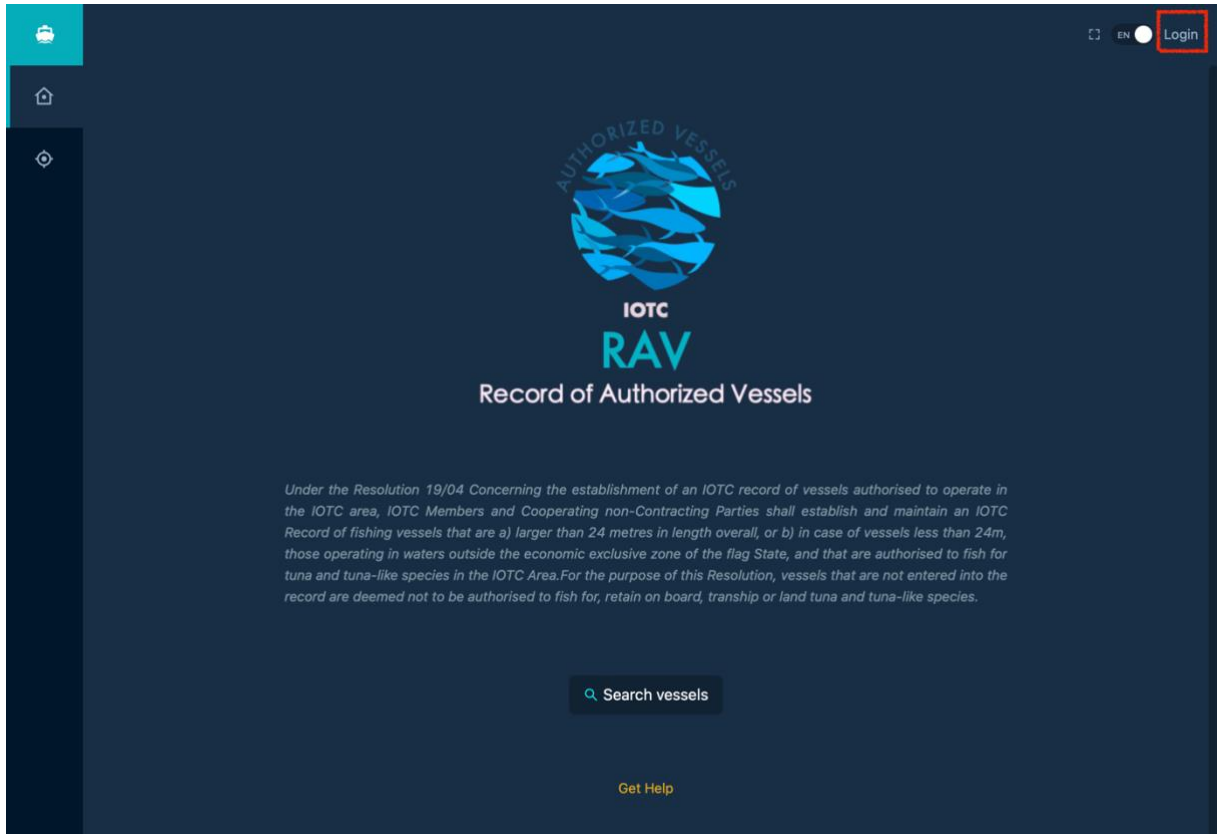
STEP 6: **Type in your email (or username) and password**, then click "Submit".

STEP 7: **You are now logged in to e-RAV** and the landing page is displayed.