

# National Marine Fisheries System

## Electronic Reporting System

Version 2

### Shoreside Logbook

# User's Guide

#### **PUBLIC REPORTING BURDEN STATEMENT**

Public reporting burden for this collection of information is estimated to average 35 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Sue Salveson, Assistant Regional Administrator, Sustainable Fisheries Division, Alaska Region, NMFS, P.O. Box 21668, Juneau, AK 99802-1668.

#### **ADDITIONAL INFORMATION**

Before completing this data entry please note the following: 1) The NMFS may not conduct or sponsor this information request, and you are not required to respond to this information request, unless the form displays a currently valid OMB control number; 2) This information is being used for American Fisheries Act (AFA) management measures; 3) Federal law and regulations require and authorize NMFS to manage commercial fishing effort; 4) Use of the Shoreside Processor Electronic Logbook Report (SPELR) and submission of this information is required for all processors taking deliveries of any groundfish species from an AFA-eligible vessel; 5) This information is mandatory and is required to manage commercial BSAI pollock fishing under 50 CFR part 679 and under section 402(a) of the Magnuson-Stevens Fishery Conservation and Management Act (16 U.S.C. 1801, *et seq.*) (Magnuson-Stevens Act); 6) Responses to this information request are confidential under Section 402(b) of the Magnuson-Stevens Act. They are also confidential under NOAA Administrative Order 216-100, entitled "Confidentiality of Fishery Statistics." These procedures have been implemented under the NMFS Operations Manual entitled, "Data Security Handbook for the Northwest-Alaska Region National Marine Fisheries Service." Notwithstanding any other provision of the law, no person is required to respond to, nor shall any person be subject to a penalty for failure to comply with, a collection of information subject to the requirements of the Paperwork Reduction Act, unless that collection of information displays a currently valid OMB Control Number.

# TABLE OF CONTENTS

<b>INTRODUCTION</b> .....	<b>3</b>
<b>SYSTEM REQUIREMENTS</b> .....	<b>3</b>
<b>TECHNICAL SUPPORT</b> .....	<b>3</b>
<b>HOW TO OBTAIN ER SOFTWARE</b> .....	<b>3</b>
<b>INSTALLING THE ER SYSTEM V2 FROM CD</b> .....	<b>3</b>
<b>INSTALLING THE ER SYSTEM FROM THE INTERNET</b> .....	<b>5</b>
<b>UNINSTALLING ER SYSTEM SOFTWARE</b> .....	<b>5</b>
<b>STARTING THE SYSTEM</b> .....	<b>6</b>
<b>MAIN MENU</b> .....	<b>6</b>
DATABASE TAB .....	7
TRANSMIT TAB .....	8
COMMUNICATIONS SETTINGS TAB .....	9
CURRENT REPORT TYPE .....	9
CLIENT INFORMATION .....	10
BUYING STATIONS .....	11
VESSELS .....	11
SHORESIDE LOGBOOK .....	12
Daily Log Tab .....	12
Deliveries Tab .....	13
Filter Tab .....	14
PRODUCT AND DISCARDS .....	15
SHORE LOG DELIVERIES LIST .....	16
SHORE LOG DELIVERY REPORTS .....	17
FISH TICKETS .....	18
Statistical Areas .....	19
PRINTED REPORTS .....	19
<b>INDEX</b> .....	<b>20</b>

## **Introduction**

Throughout this manual this version of the “NMFS Electronic Reporting System” will be referred to simply as the “ER System V2” or the “shoreside logbook”. This distribution of ER System V2 is for shoreside processors (including processor vessels that operate as state waters motherships). A separate distribution of the ER System is available for processor vessels operating in the EEZ.

The ER System was developed by NMFS to allow processors to submit Federal reports to NMFS by electronic means, as opposed to filling in blank forms and faxing them to Juneau. The ER System is intended to help processors by making the reporting process simpler and more accurate. The ER System also helps NMFS because the data is automatically entered into the NMFS database. This automatic data entry eliminates possible data entry errors when NMFS staff processes reports and enters data.

## **System Requirements**

The ER System V2 requires a computer running Windows 95, 98, NT, or compatible operating system.

Electronic transmission of data files requires a modem or compatible device or a messaging system such as internet email or Inmarsat C.

## **Technical Support**

If you encounter any problems installing the software or in using the system please call (907) 586-7085 and ask for electronic reporting technical support, or you can e-mail [er.help@noaa.gov](mailto:er.help@noaa.gov)

## **How to obtain ER software**

NMFS will mail you an ER System V2 installation CD upon request. Call the NMFS Juneau office at (907)586-7228, the NMFS Dutch Harbor office at (907)581-2062, or the NMFS Kodiak office at (907) 481-1781 to make arrangements to get an installation CD. You can also download the ER system software from the NMFS homepage at [www.fakr.noaa.gov](http://www.fakr.noaa.gov).

## **Installing the ER System V2 from CD**

This software requires Windows95, 98 or WindowsNT, and is provided in Compact Disc (CD) format.

- 1) Close all other applications.

2) Make sure that a previous installation of the ER System V2 is not already installed on your machine. If a previous installation has been done, it **MUST** be removed before you install again. Please refer to the section on Uninstalling ER System Software.

ER System V2 may be installed on a computer with the previous version of ER software (Version 1.5). You may wish to regain version 1.5 if you want to access 1998 or 1999 data that were entered with that version.

3) Run the Setup.exe program from the ER Version 2 CD. One way to locate and run this program is:

- a) Click on the START button in the lower left corner of the screen, and highlight the PROGRAMS menu.
  - b) Choose “Windows NT Explorer” or “Windows Explorer” from the menu.
  - c) From the “Explorer” screen, click on “My Computer” in the top left side of the screen.
  - d) In the contents of “My Computer”, check to see which disk drive is labelled CD-ROM.
  - e) Place the NMFS Electronic Reporting System CD-ROM in the CD drive of your computer, and close the CD drive door.
  - f) Click on the CD-ROM’s disk drive in the left hand side of your screen. This will cause all the files on the CD-ROM to be listed on your screen.
  - g) Scroll down the list of files and double-click on a file named “setup.exe”. This will start the installation procedure.
- 4) The first screen you see should be a reminder to exit all other software before attempting installation of ER. Click OK.
- 5) You are prompted for your Alaska Federal Fisheries Permit Number. Enter the 4 digit number that identifies your processor. This number is found on your Federal fisheries or processor permit.
- 6) The next screen will request that you specify a destination directory for installing this software. It is recommended that you accept the default directory of C:\Program Files\ER Client2\. Click the big button to accept this default directory.
- 7) The next screen should say that the program has installed successfully,

- 8) To start up the ER System, push the START button in the lower left corner, click on PROGRAMS, and from the menu list under PROGRAMS, click on ER Client 2.

## Installing the ER System from the Internet

The NMFS Electronic Reporting client software can be downloaded from the Electronic Reporting Homepage '[http://www.fakr.noaa.gov/nmfs\\_er/](http://www.fakr.noaa.gov/nmfs_er/)'.

Steps to download the ER system:

1. Create a temporary folder (directory) named **C:\ERTemp**. Files will be downloaded to this folder.
2. Go to the Electronic Reporting screen at the NMFS Homepage: [http://www.fakr.noaa.gov/nmfs\\_er/](http://www.fakr.noaa.gov/nmfs_er/)
3. There is a blue hypertext area to click: [ERV2Elog.EXE](#)

This will download the NMFS Electronic Reporting client software Version 2 for shoreside processors.

Processor vessels should download the file [ERV2Vess.EXE](#)

These are compressed, self-extracting files.

4. In MS Internet Explorer, the 'Save As' screen will appear. Make certain that the ERTemp folder is selected. You will have to select ERTemp yourself. Then press Save.
6. After the software is downloaded, you need to decompress the files. Run the self-extracting file by double-clicking on its name. The files will extract to the same directory (ERTemp).
7. After the files are decompressed, you need to run the file 'Setup.exe', which is part of the ER software. To run the file 'Setup.exe', click the **Start** button on the task bar, then press **Run**. Type in: **C:\ERTemp\setup.exe** then press **OK**. Follow steps 4-8 of the CD installation listed above.

## Uninstalling ER System Software

It may be necessary to uninstall and re-install the ER System software. Before uninstalling, make sure that you have a current backup of your ER database. Check with NMFS to make sure that the data associated with your current ER System software will not be lost if you have any question about the correct procedures.

To uninstall the ER System Software, click on the START button in the lower left corner of your screen, then click on SETTINGS, CONTROL PANEL, and finally on ADD/REMOVE programs. Follow the prompts to remove the entire ER System software. After removing the ER System software, it is a good idea to look in the directory where it was previously installed and check to make sure that all of the files in that folder have been removed. Now it is safe to re-install the ER System software in the same folder.

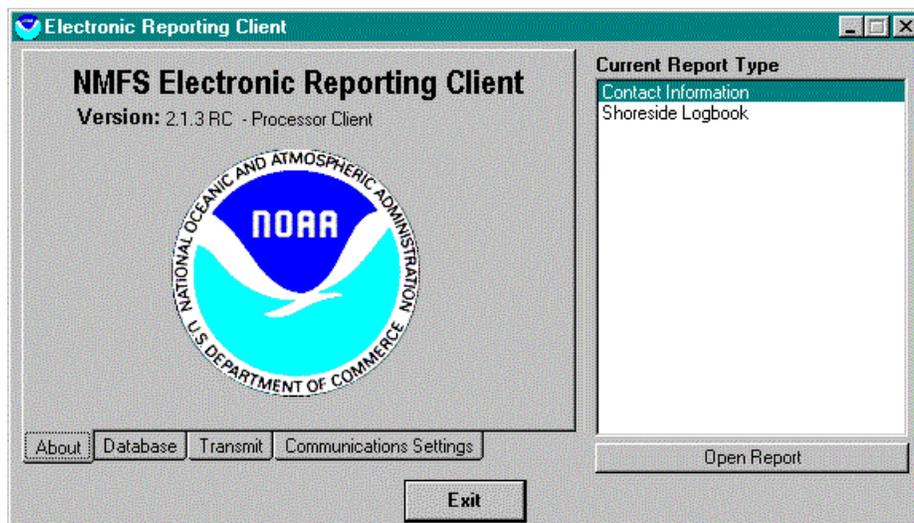
## Starting the system

To start the ER System software click the Start button at the bottom left corner of the screen, then highlight Programs. Click on the 'ER Client 2' item in the Programs list and the software will start.

After installation of the electronic shoreside logbook program and upon double clicking the program icon to run, the login screen appears for the first time. The 'User' line contains "Admin". There is no password and by pressing enter you will proceed to the Main Menu. From the Main Menu choose the database tab and edit 'user/password' to enter a password for the Admin user or to add other users to the system.

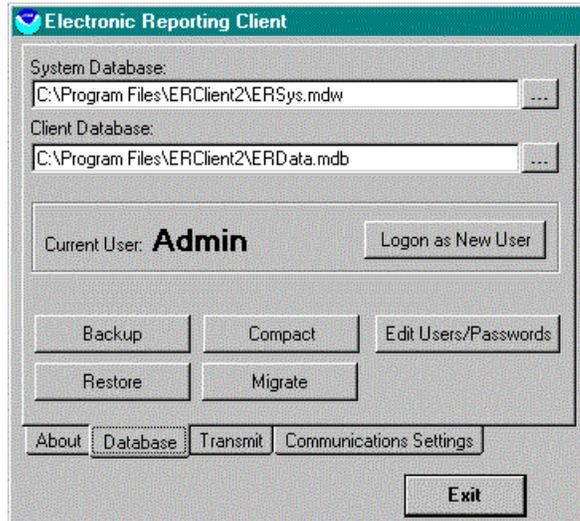
## Main Menu

The following screen will display. There are 4 tabs on the lower left of the screen labeled About, Database, Transmit and Communications Settings. On the form's right side is 'Current Report Type' which is where you select the Report type you want to work with. The 'About' tab is the default (shown below). It displays the software version number, which is useful for technical support.



## Database Tab

The Database tab displays the name and location of the System and Client Databases. The System database contains the account names and passwords for the ER system. The Client database contains all the report data. The button to the right of the database name can be used to locate and select a different database. There are also command buttons to Backup, Restore, Compact, and Migrate the database. You can also Edit User accounts and passwords or Logon as a different User.



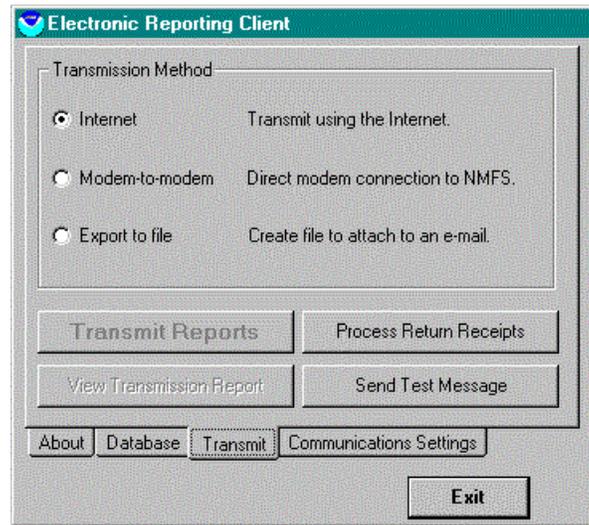
**COMPACT:** When records are deleted from an Access database, they are marked for deletion, which means they remain in the database but you can't see them. This gives the ability to recover deleted records at a later date. If you are certain you will never want to recover deleted records, you can eliminate the records marked for deletion by 'compacting' your database. This will reduce the size of the database and free up disk space.

**BACKUP:** This makes a backup copy of the database. Backups should be done daily, so that in the event that the database must be restored (see RESTORE below) the amount of data that would have to be re-entered would be limited to the most recent day. By default, the letters "BK" will be added to the beginning of the file name and it will be copied into the same folder as the existing database, unless the user chooses to place it into a different folder.

**RESTORE:** This copies a backup database over your database. The backup copy will 'restore' the database to its former condition. This would be done if there were a problem with the existing database.

**MIGRATE:** This feature is used to migrate a database from one version of ER System V2 to a later upgrade. It can be used by shoreside logbook Beta testers to migrate their data to the current released version.

## TRANSMIT TAB



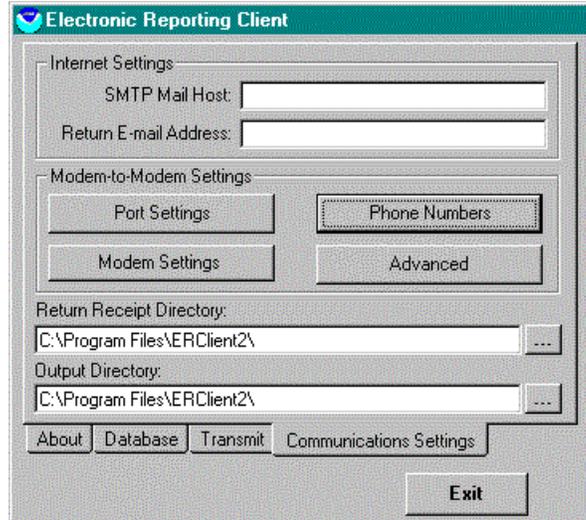
Select your transmission method from the three buttons. Reports can be transmitted automatically using internet E-mail if your system is configured with a network or dial-up connection to the internet and an internet E-mail host. Select Modem-to-modem if you wish to transmit files directly to the NMFS host computer by connecting over the phone system. Your system must have a compatible modem and telephone connection to use this option. To transmit a report using a messaging system such as Inmarsat C, select Export to file, which will create a data file in the Output directory. This file can be attached to an Inmarsat C message and sent to NMFS. This text file will reside in the Output Directory.

After reports have been sent to NMFS a return receipt is generated by NMFS that acknowledges receipt of all reports sent in a single transmission. The return receipt will be sent to you as an attachment to an e-mail message. The return receipt attachment must be placed in the "Return Receipt Directory" of the ER software. The directory path (by default: c:\Program Files\ERClient2\) can be seen on the "Communications Settings" tab of the ER software. Once the return receipt is in the "Return Receipt Directory", push the "Process Return Receipts" button to process the receipt and produce the Transmission History report.

The 'Send Test Message' button is used to send a test message to NMFS to determine if communications are working correctly.

## ***Communications Settings Tab***

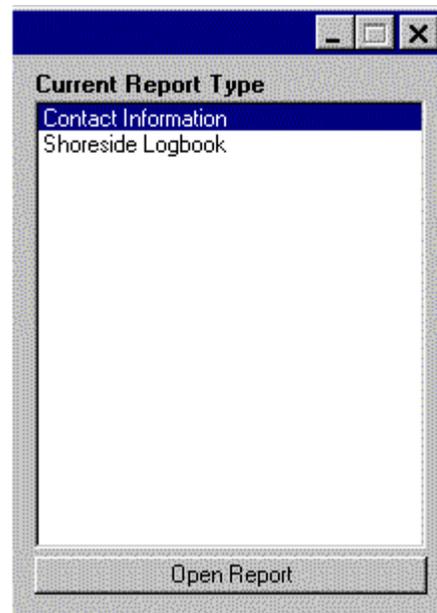
The Communications Settings tab contains configuration parameters used in transmitting reports to NMFS. This is where you establish (change) phone numbers, modem and port settings. The Return Receipt and Output directories are the directory locations on your system for outgoing reports and for return receipt files sent by NMFS.



The system default parameters will work in most cases.

## ***Current Report Type***

The Electronic Reporting System supports several types of reports. They are displayed in the Report Type window on the right side of the Main Menu. To open a report type, you highlight the report, then click the 'Open Report' button or double-click on the report type name.



## Client Information

If you select Client Information this screen will appear. It contains information about your company. Please make sure all lines are filled out. The e-mail address is used to send return receipts back to you. The representative should be the person we need to talk to should there be questions with the reports. From this screen you can also access the Buying Stations and Vessels. If you're receiving fish from a Buying Station the Buying Station information must be entered through the 'Edit Buying Station' tab before delivery information can be entered. Entering a list of the catcher vessels you take deliveries from will simplify data entry for deliveries and make the catcher vessel name available on reports.

**Client Information**

Name: **Test Shoreside Processor**

NMFS ID: **3** Federal Permit #: **PA990003**

ADF&G Proc. Code: **F0000** State Port Code:

Phone:

Fax:

E-mail address:

Representative:

## **Buying Stations**

This is the screen to enter Buying Station Information. It will create one record for each Buying Station.

Click the New button to enter a buying station record.

To page through all the Buying Stations, click the arrow buttons near the bottom of the screen.

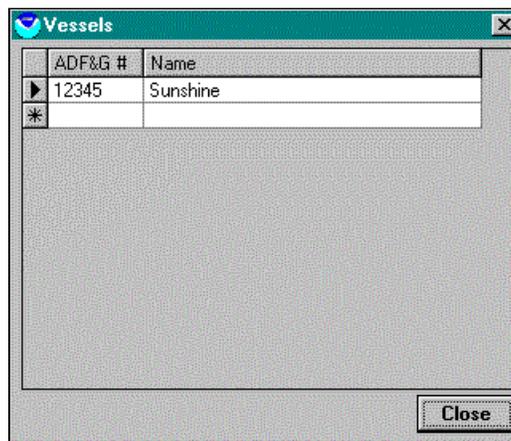


The screenshot shows a dialog box titled "Edit Buying Station Infor...". It contains the following fields and controls:

- ID: (empty text field)
- Name: (empty text field)
- Type: (radio buttons for "Tender Vessel", "Vehicle", and "Other")
- ADF&G #: (empty text field)
- DMV License #: (empty text field)
- Description: (empty text area)
- Navigation: (Left arrow, "Buying Station 0 of 0", Right arrow)
- Buttons: "New", "Delete", "Close"

## **Vessels**

Enter the ADF&G number and name for each catcher vessel you take deliveries from. This builds a database of catcher vessels that you can pick from when entering delivery information.



The screenshot shows a dialog box titled "Vessels". It contains a table with the following data:

	ADF&G #	Name
▶	12345	Sunshine
*		

There is a "Close" button at the bottom right of the dialog box.

## Shoreside Logbook

The screenshot shows a window titled "Report List" with three tabs: "Daily Logs" (selected), "Deliveries", and "Filter". Below the tabs is a calendar for "August, 1999". The calendar grid has columns for days of the week (SUN to SAT) and rows for dates. Most dates from 1 to 24 have a red question mark icon. The date 25 (Wednesday) has a cyan question mark icon. Dates 26 through 31 are empty. At the bottom of the window, there are two checked checkboxes: "No Production" and "No Deliveries". To the right of these are four buttons: "Re-transmit", "Delete", "Edit", and "Cancel".

### Daily Log Tab

There are three tabs at the top of the Report List . The Daily Log Tab displays a calendar. Each date displays a colored icon to indicate the presence of Daily Log records on that date.

### Red Question Mark Icon:

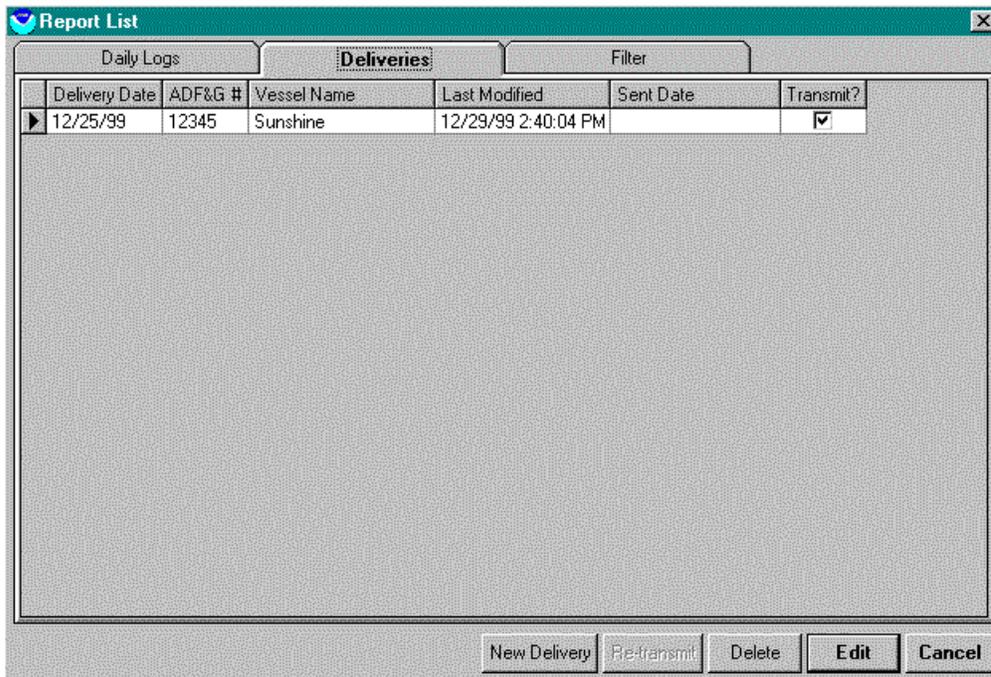
Daily log information has never been entered or is not complete for this day. To be complete, at least one delivery and one product must be entered OR the corresponding No Deliveries or No Production flag must be set.

### Mail Box Icon

Daily log information has been entered and the information will be transmitted on the next transmission OR a record that has been sent has been revised and the revised information will be sent in the next transmission.

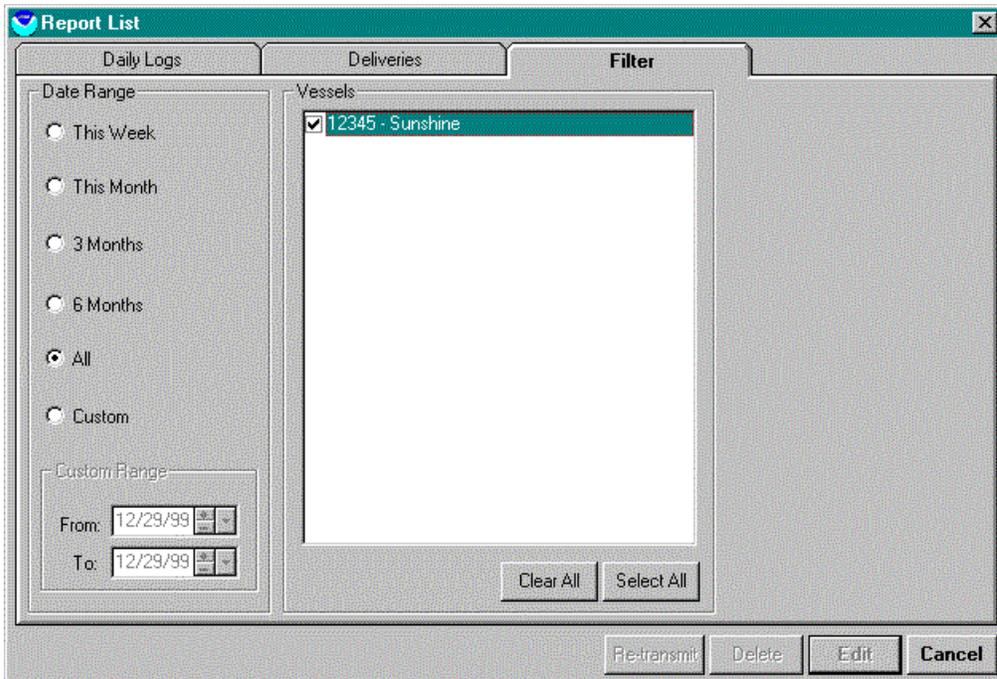
### No Icon

Daily log information entered and sent or the day hasn't happened yet (future date).



### **Deliveries Tab**

The Deliveries Tab displays a list of all the deliveries. From this screen you can use the buttons at the bottom of the screen to create a new delivery, edit a current delivery, delete a delivery, or retransmit a delivery. You click on an existing Delivery to select it and double-click to open or single click to select followed by one of the action buttons, Retransmit, delete or edit. The sent date is filled in when the report is transmitted to NMFS. The Transmit? checkbox indicates whether a report contains new or edited data and will be transmitted to NMFS. It is for information purposes only, and cannot be set by the user.



### **Filter Tab**

The Filter Tab allows you to select reports by date range, making it easier to locate reports on the Deliveries tab. The default is “All” reports, but you may wish to set it to present only recent reports on the list. You can select the ‘Custom’ option button to enter your own custom dates. You can also make selections for individual vessels by highlighting the one you want to view, then select the appropriate tab. The vessels that appear on this list are those that you entered under the “Contact Information” report.

## Product and Discards

Electronic Reporting - Shoreside Logbook

File Edit Reports

Test Shoreside Processor Units of Measure:  pounds  metric tons

Federal ID: 3 Federal Permit #: PA990003 State Proc. Code: F0000 Port

Date: 08/25/99 Number of Observers on Site: 0  No Deliveries  No Production

Products/Plant Discards

BSAI		GOA	
Species	P/A/R	Product	Weight (lbs)
*			

Deliveries Close

This is the Shoreside Logbook Products/**Plant** Discards entry screen. To enter Bering Sea or Gulf of Alaska data select the appropriate tab BSAI or GOA and enter the species, whether the product is primary, ancillary or reprocessed, the product code and weight for each product made that day. To enter or edit Delivery data, click on the button 'Deliveries'. Units of measure may be in pounds or metric tons. You can change the units of measure and all data are recalculated and displayed in the selected units. If there were no deliveries or production for the day you may mark the 'No Deliveries' and/or 'No Production' boxes by using the left mouse button to click the appropriate check box.

## Shore Log Deliveries List

Electronic Reporting - Shoreside Logbook

File Edit Reports

Test Shoreside Processor Units of Measure:  pounds  metric tons

Federal ID: 3 Federal Permit #: PA990003 State Proc. Code: F0000 Port

Date: 08/25/99 Number of Observers on Site: 0  No Deliveries  No Production

Deliveries

ADF&G #	Fishing Began	Last Modified	Sent Date
---------	---------------	---------------	-----------

New Delivery Edit Delivery Delete Delivery

Products Close

This is the Shore Log Deliveries screen. After Deliveries are entered, each Delivery Report will be displayed as a line in a grid. (In this example there are no Deliveries.) To add a delivery, you would click on the button 'New Delivery'. After reports are entered the 'Edit Delivery' and 'Delete Delivery' buttons will be enabled. To return to the Products screen click on the 'Products' button.

## Shore Log Delivery Reports

**Electronic Reporting - Deliveries**

File Edit Fish Tickets Reports

Test Shoreside Processor Units of Measure:  pounds  metric tons

Federal ID: 3 Federal Permit #: PA990003 State Proc. Code: F0000 Port:

Delivery Information

Delivery Date: 08/25/99

Date Fishing Began: / /

Vessel ADF&G #: [Dropdown]

Delivered By Buying Station?

Buying Station Information

Name: [Dropdown]

Date Received by Buying Station: / /

Discard Report Received?

Reason for Missing Discard Report

Catcher Vessel not Federally Permitted

Catcher Vessel Length < 60'

Not provided by Catcher Vessel

Fish Ticket Information Close

When entering delivery information the delivery date automatically defaults to the current date. You may change the date in both 'Delivery Date' and 'Date Fishing Began' by using the + and - keys or by typing in the date. The "down-arrow" button on the date control brings up a small calendar that you can use to pick a date. The vessel ADF&G # can be typed in or use the "down arrow" button to select a vessel from the database you entered information into under Client Information, 'Edit Vessels'. If the delivery was made by a Buying Station, mark the box using the left mouse button or by hitting the space bar then use the down arrow key to select the appropriate Buying Station. The Buying Station information must be originally input through the Client Information, 'Edit Buying Stations' tab. If a discard report was received, mark the box by clicking the left mouse button or space bar. If you didn't receive a discard report mark one of the choices provided by using the left mouse button or use the arrow keys. When entering a Delivery, you may need to access the Buying Station screen and the Fish Ticket Information screen. They are described below.

## Fish Tickets

Electronic Reporting - Deliveries

File Edit Worksheets Reports

Test Shoreside Processor Units of Measure:  pounds  metric tons

Federal ID: 3 Federal Permit #: PA990003 State Proc. Code: F0000 Port

Fish Ticket Information

Fish Ticket #: **G97** 246891 Management Program:  Statistical Area Worksheet

Gear Type: 07 Account/Permit #:

Catcher Vessel: 12345 - Sunshine

Landings		Discards/Donated	
Species	Product		Weight (mt)
▶ 270 - Pollock	03 - Bled fish: throat or isthmus slit f		113.427
110 - Pacific Cod	01 - Whole fish/food		14.515
*			

Worksheet 1 of 1 Delivery Information Close

After you press the Fish Ticket Information' button on the Delivery form, this screen appears. In many cases, a delivery will have only one fish ticket, but in some cases – such as landings with both CDQ and IFQ fish, or an IFQ landing with the catch distributed among multiple permit holders, there may be multiple Fish Tickets for the delivery. You can page through each record by pressing the arrow buttons at the lower left of this screen. To enter Discards or Landings, select the correct tab near the center of the screen. Start by entering the fish ticket number (example: G97), hit tab and enter the rest of the number making sure there are six places filled out in the box (example: 001234). Enter the gear type by ADF&G gear code number as shown on the fish ticket or use the down arrow to select one. Tab to 'Management Plan'. Use the down arrow and select the program or type in the first letter of the appropriate program and the system will fill in the rest. **If you are not fishing in one of the listed Management Programs then leave this box and the Account/Permit # box blank** If you are fishing in a listed program enter the 'Account/Permit' number ( e.g. IFQ permit number, CDQ group number (51...56), AFA inshore Coop number (101...108)). From this screen you click the 'Statistical Area Worksheet' button to enter 6-digit ADF&G Statistical Areas.

## Statistical Areas

The Statistical Area screen is accessed from the Fish Ticket screen. Enter the 6-digit State Statistical Area code and the percentage of catch for that area. The system will provide the NMFS federal reporting area. The percentage must total 100% before leaving the worksheet. Once completed hit the close button to leave the screen.

	State Area	%	Fed. Area
*			

Total % Unallocated: 100.  
Total % Allocated: .

Close

Enter the Landings and Discard/Donated information for each species under the appropriate tabs.

## Printed Reports

Two printed reports are available from the system, one report for daily information and products, the other for delivery worksheets. These reports should be printed and maintained as official company records, subject to inspection by fisheries enforcement personnel. A Print Preview option is available from the File menu for each report so it can be viewed prior to printing.

The Daily Production Report is printed from the Shoreside Logbook “Products/Plant Discard” screen. To print the report, Click on the Printer Icon (or select File-Print from the menu bar, or Ctrl-P from the keyboard).

The Delivery Worksheet is printed from the “Fish Ticket Information” screen. To print the Delivery Worksheet, Click on the Printer Icon (or select File-Print from the menu bar, or Ctrl-P from the keyboard).

# Index

## *A*

About tab ..... 6

## *B*

Backup..... 7

## *C*

Client database ..... 7

Compact ..... 7

Current Report Type window ..... 9

## *D*

Daily Log Tab ..... 12

Database tab ..... 7

Deliveries Tab ..... 13

## *F*

Filter Tab ..... 14

## *M*

Migrate ..... 7

## *R*

Restore..... 7

## *S*

Statistical Area ..... 19

System database ..... 7