2022

Maritimes Engagement Tracker User Manual

FISHERIES AND OCEANS CANADA MARITIMES REGION
POLICY & ECONOMICS AND SCIENCE

EVERGREEN DOCUMENT | Last updated November 3, 2022

Maritimes Engagement Tracker User Manual

Contents

Introduction

The purpose of this document is to guide new users through the functions and features of the Maritimes Engagement Tracker (MarET). It is recommended that new users also read through the MarET Guidance Document, which provides further contextual information. The Guidance Document outlines the background of the MarET project and the progress that has been made on that project to date. It also details the purpose of the tool, the scope of activities to be included in MarET, how the tool is connected to iHub and the National Engagement and Consultations Tracking Registry (NECTR), describes permission levels and the plan to ensure data quality, and outlines the technical support that is available to users.

There is overlap between sections in this document, as many of the basic functionalities apply to more than one of the four components of the tool (interactions, committees and working groups, organizations, and contacts). These overlapping functionalities are described within each relevant section for the four components to allow tool users to navigate directly to the section in the manual that applies to their circumstance.

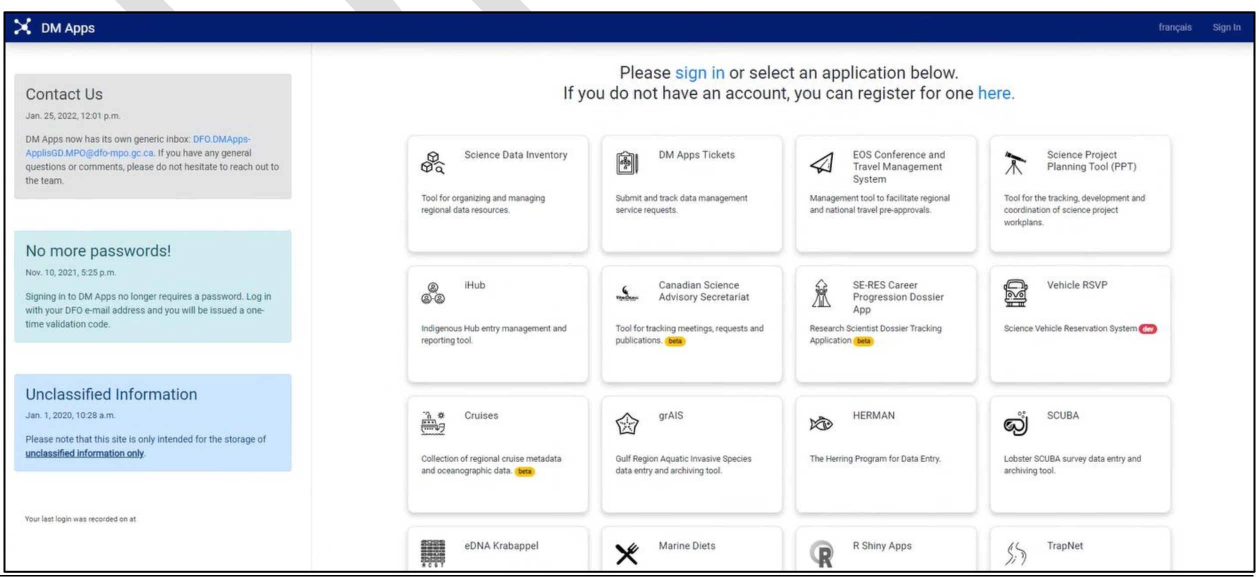
This document is intended to be evergreen, and will be updated any time the tool is upgraded in such a way that changes the functionalities described in this document.

Getting set up

Signing onto DM Apps

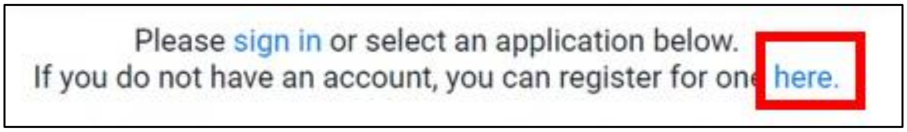
MarET is part of Data Management Applications (DM Apps), which is web-based and can be accessed at the following link: http://dmapps/en/. It can only be accessed if you are connected to the DFO Network.

When you first open the website, you will see the following screen:



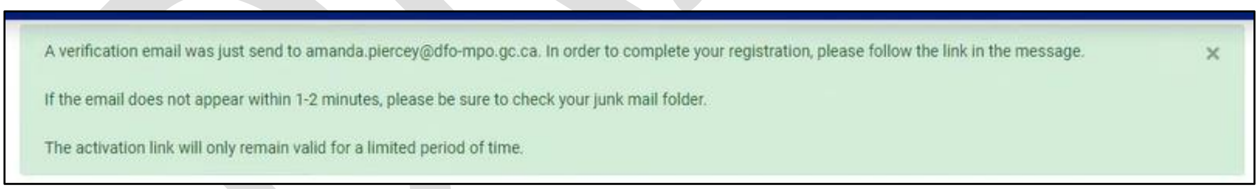
[Back to top]

Click the blue “here” link at the top of the screen to register for a DM Apps account:

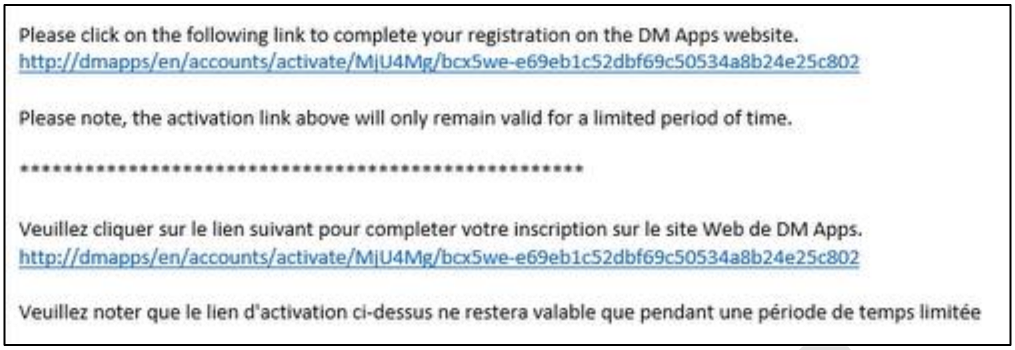


That will bring up the following page:

Fill in the requested information and click the blue “Sign Up” button to register for a DM Apps account. Once you click “Sign Up”, you will be brought back to the DM Apps home page, which will now display the following message at the top of the screen (note the email address indicated will be your own email address):



You will then receive an email with the following message:



Please click on the following link to complete your registration on the DM Apps website.
http://dmapps/en/accounts/activate/MjU4Mg/bcx5we-e69eb1c52dbf69c50534a8b24e25c802

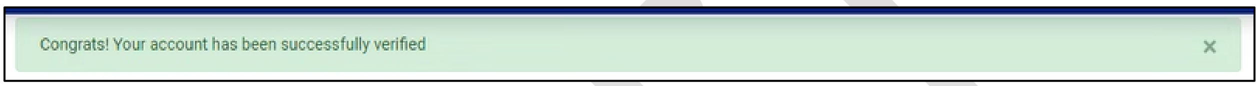
Please note, the activation link above will only remain valid for a limited period of time.

****

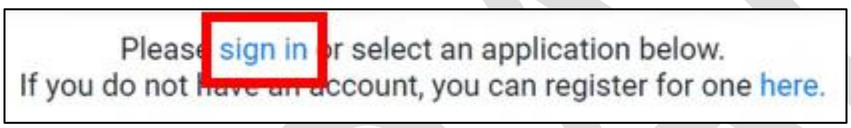
Veuillez cliquer sur le lien suivant pour completer votre inscription sur le site Web de DM Apps.
http://dmapps/en/accounts/activate/MjU4Mg/bcx5we-e69eb1c52dbf69c50534a8b24e25c802

Veuillez noter que le lien d'activation ci-dessus ne restera valable que pendant une période de temps limitée

Once you click on the link in the email, you will be brought back to the DM Apps home screen, and this time the following message will appear:



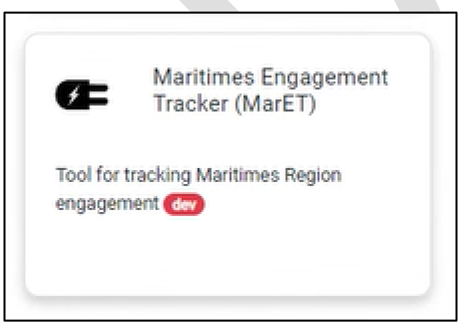
DM Apps no longer requires passwords. Instead, at periodic intervals when you try to access DM Apps, this same message will appear and you will need to click the "sign in" link:



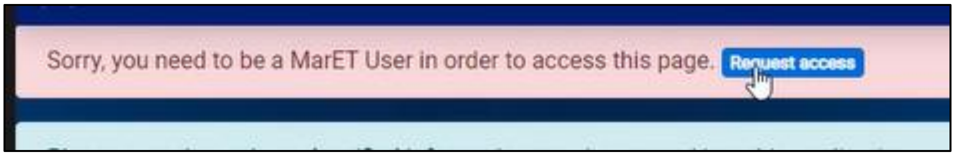
You will go through a similar process as before: entering your email address, receiving a sign-in link in an email, and clicking on that link to sign in.

Signing onto MarET

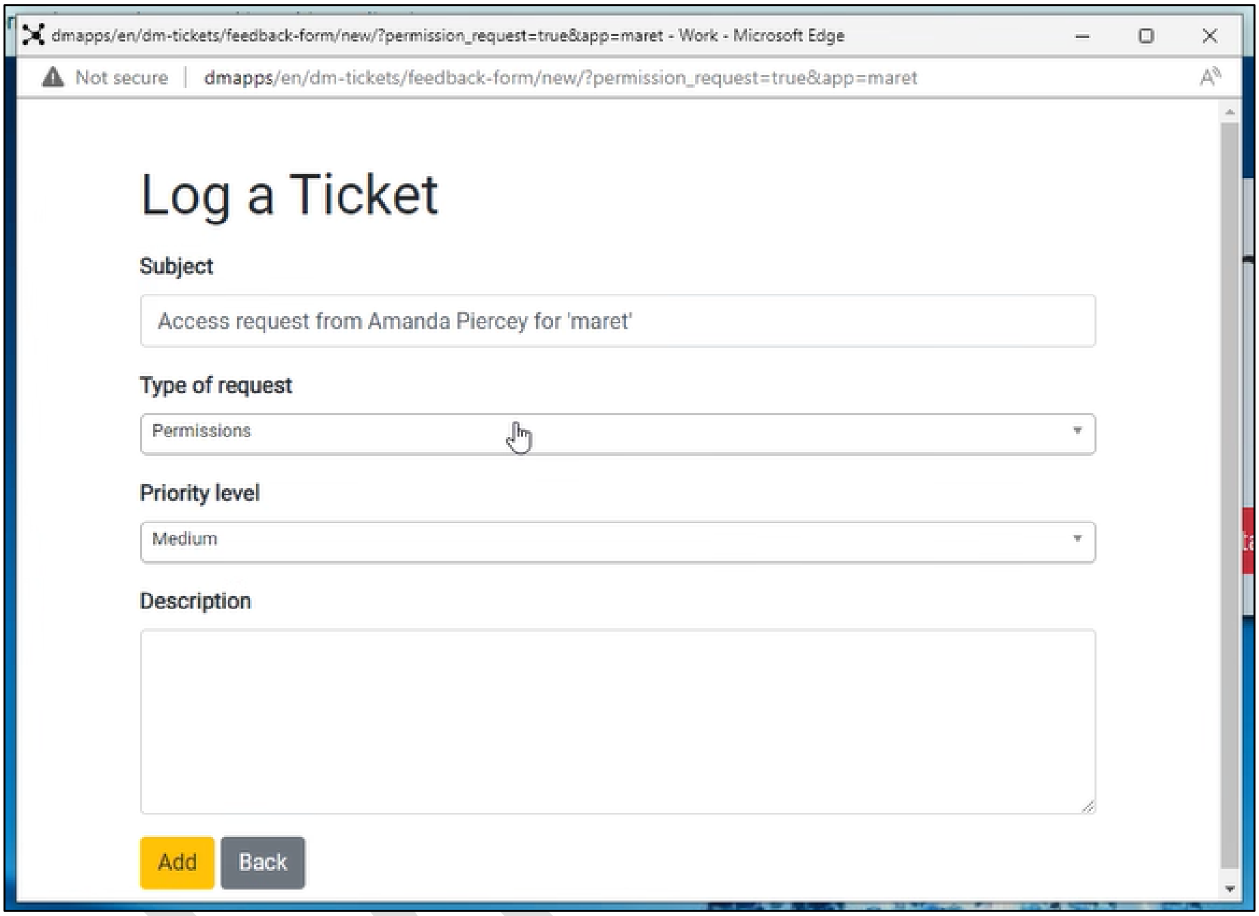
Once you have a DM Apps account, you can request access to MarET. Open the DM Apps home screen and scroll down until you see the app:



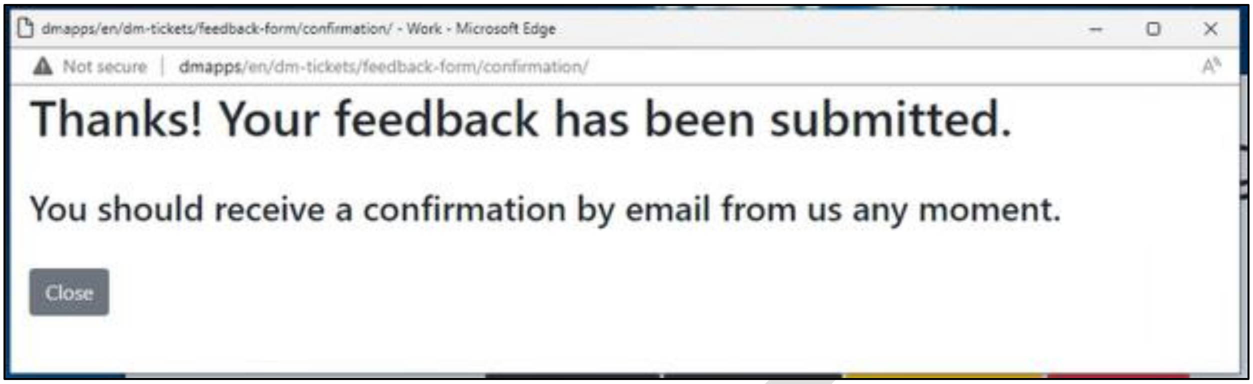
Clicking on that box will open the MarET home screen (more on the home screen in a later section). However, if you try to click on any of the pages, the following error message will appear:



Click on the blue "Request access" button, and a ticket page will open:



It is suggested that you indicate in the "Description" box which branch or area office you work with, and what level of access you require (read or edit). Further background information about access levels can be found in the MarET Guidance Document. Once you have filled out the ticket, click "Add". Once you do, the following page will appear:

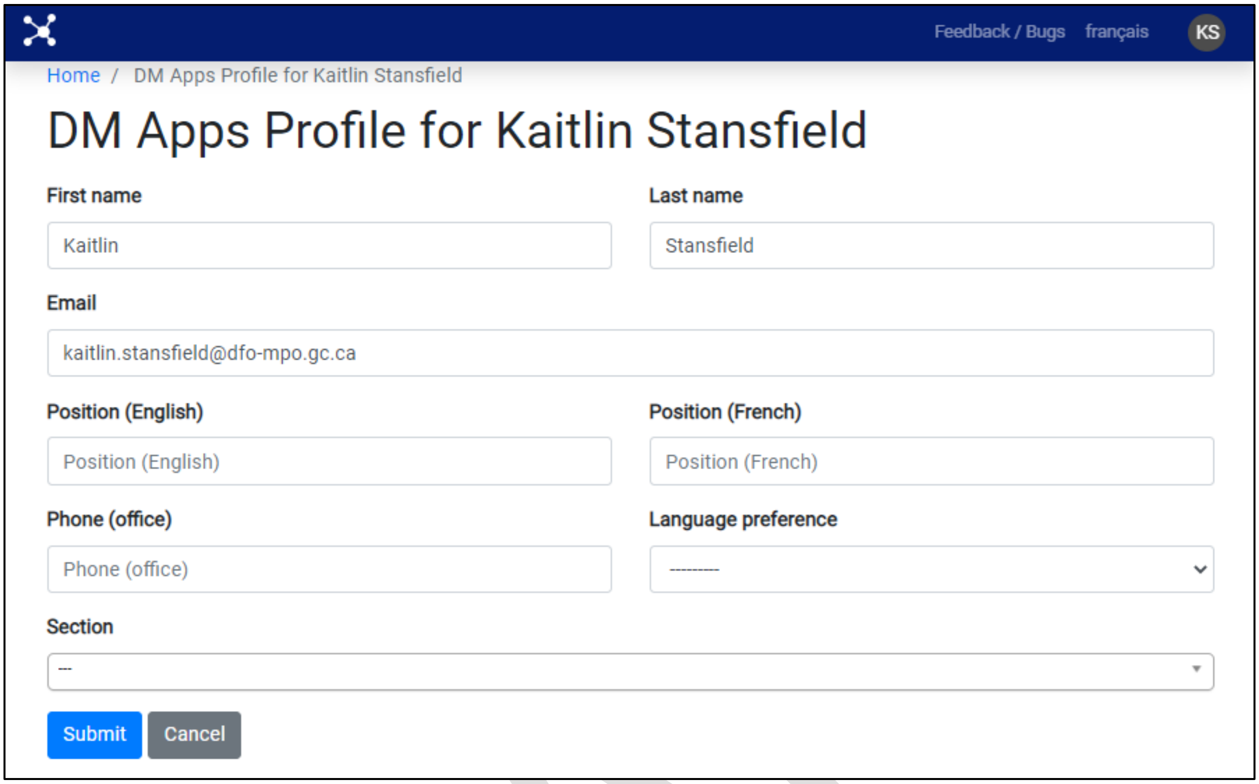


You will then receive a confirmation email, with a link to your ticket so that you can monitor its progress (more on tickets in a later section). One of our admins will contact you to let you know when you have been granted access. Currently, these admins are staff located in the Policy Research Division of Policy & Economics branch and in the Ocean Data and Information Section of Science branch. Once branches and area offices have their own app administrators, these requests will be redirected to the relevant administrator for action.

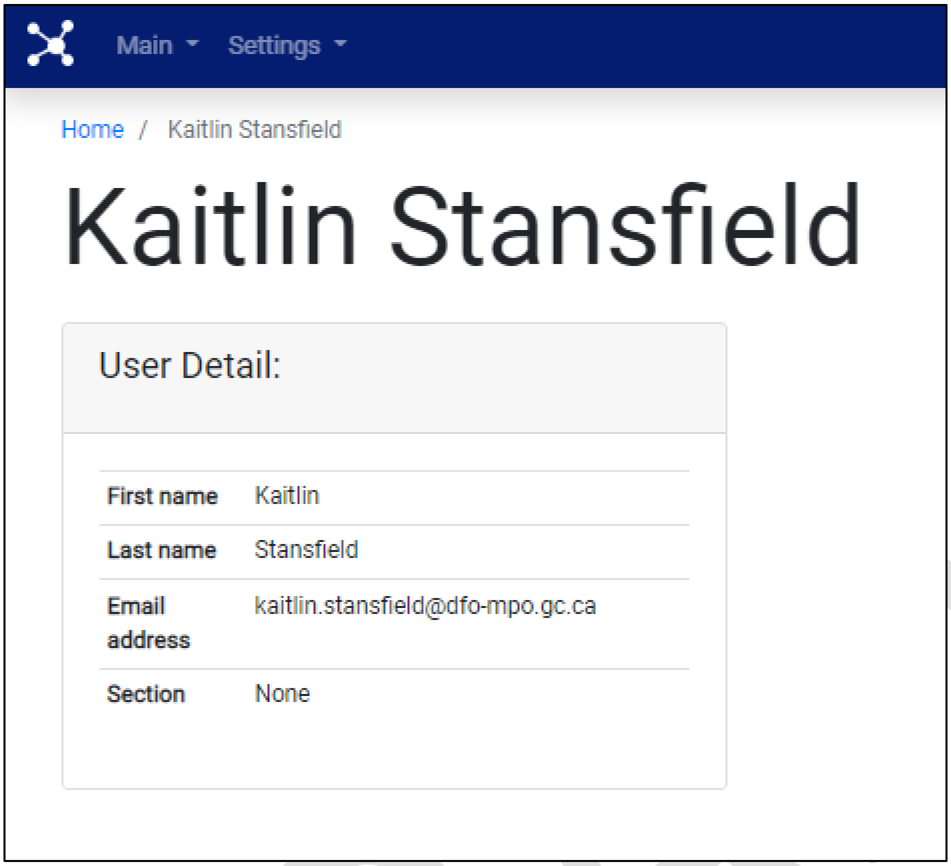
Setting up your profile

To view or edit your profile, click on your initials at the top right of the screen.

The following page will appear:



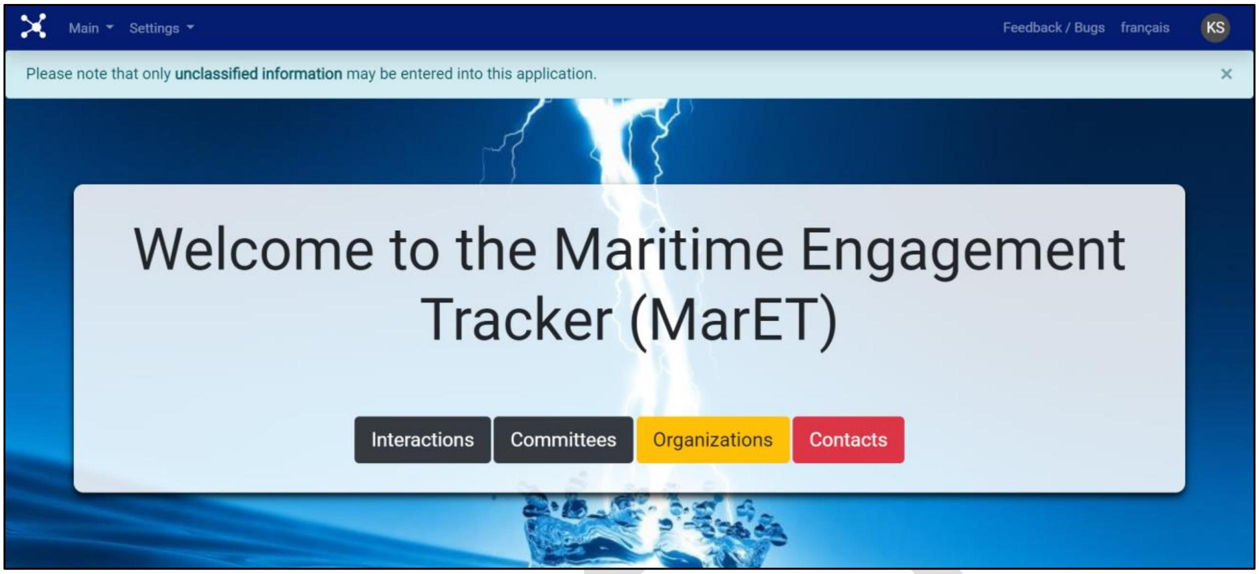
Please fill out as much of the information as possible. Note: the Section list still requires updating. When others are navigating the MarET tool, if you are listed as a DFO staff member associated with a given interaction, committee or working group, contact, or organization, MarET users will be able to click your name, which will direct them to the following information:



This way, other tool users will know how to get in contact with you or your section should they have any questions.

MarET home screen

You can navigate to MarET by opening the DM Apps home page, scrolling down, and selecting the MarET icon, or by navigating directly to the MarET page. More details about accessing DM Apps and MarET are provided in previous sections, Signing onto DM Apps and Signing onto MarET. The MarET home screen has many important functions:

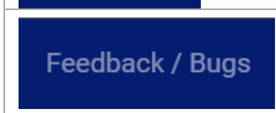


The “Interactions”, “Committees”, “Organizations”, and “Contacts” buttons will take you to those specific pages (covered in greater detail in later sections).

The light blue banner near the top of the home screen reminds users that only unclassified information may be entered into the application. In general, MarET is not intended to store detailed or sensitive information. It is meant to capture high-level information and to indicate who users can reach out to for more information.

Header

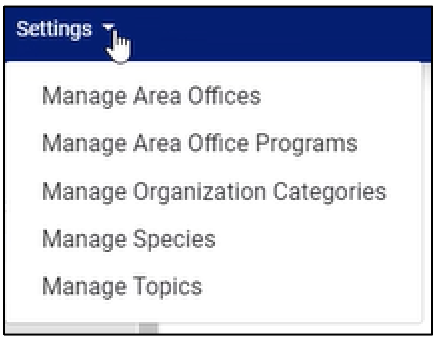
The navy blue header at the top of the page is visible on all pages of MarET for ease of navigation. It includes the following:

	Clicking this icon will bring you back to the DM Apps home page.
	This button allows you to navigate to any of the five pages of the MarET tool: Home, Interactions, Committees, Organizations, and Contacts.
	The available settings will vary depending on your permissions level. More information about settings is provided below.
	If you encounter a technical issue, or if you have a suggested improvement to the tool, click this item to open a new window for you to submit a ticket. More information on this function is available below.
	Clicking on this icon will change the operating language to French. Note that the tool is not yet fully bilingual.

	This icon will show your initials. You can click on it to either navigate to your profile, or to sign out. See the earlier section about profiles for more information.

Settings

As mentioned, the settings available will vary depending on your permissions level. Users with reading or author permissions may see the options to manage various lists (as shown in the image below), but they will not be able to access or edit these features unless they have admin level permissions:



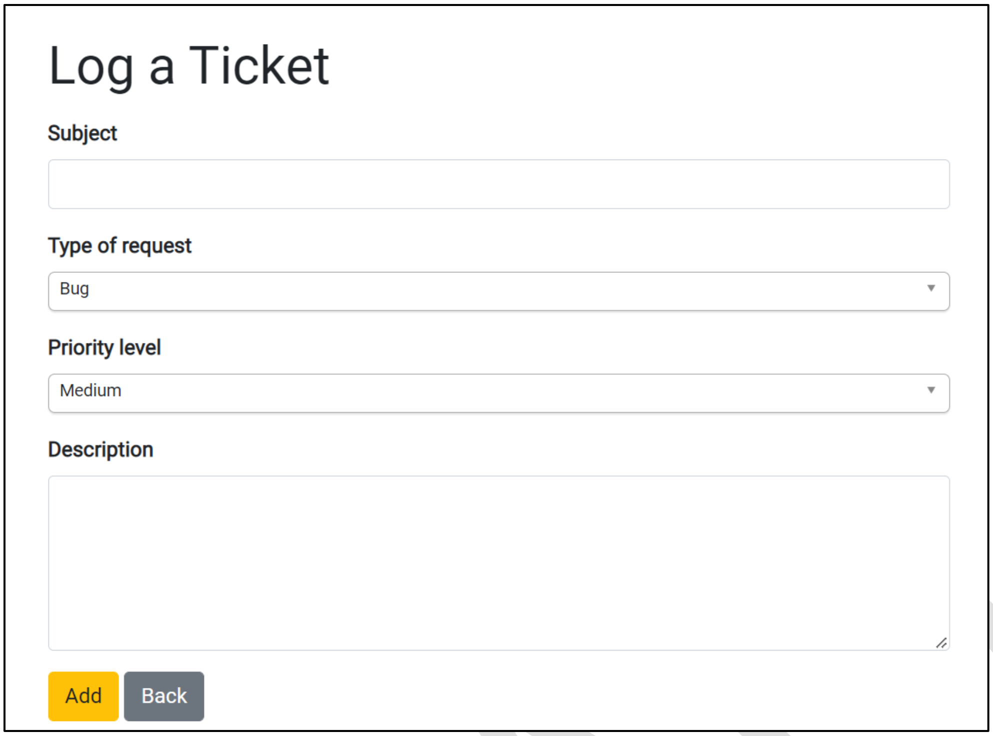
For more information on how permission levels will be organized, please consult the MarET Guidance Document.

MarET admins are able to adjust the above lists (Species, Topics, etc.), and can also edit help text and assign permission levels. More detailed guidance and training will be provided to users with admin permissions.

Feedback / Bugs function

The Feedback / Bugs function is available to log tickets as you use and navigate MarET:

Clicking the “Feedback / Bugs” text will bring up a new window containing the following:



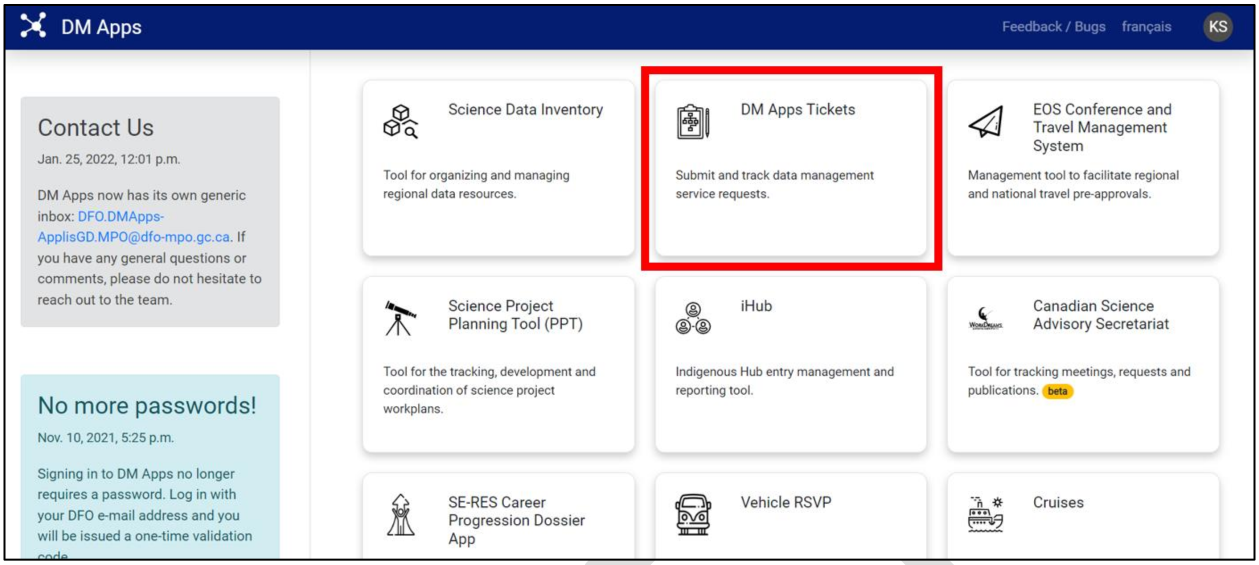
Types of requests include:

1. Bug – to be used if there is a glitch in the tool or certain functions are not working.
2. App enhancement – to be used if you have any recommendations for how the tool's functionalities might be optimized.
3. Process development – to be used to flag any suggestions for how the tool is structured, or how teams use it.
4. Permissions – to be used to log any requests, concerns, or questions relating to permissions.
5. Report development – to be used to log any concerns or questions relating to reporting.
6. Other – for any other requests that do not fit within the other categories.

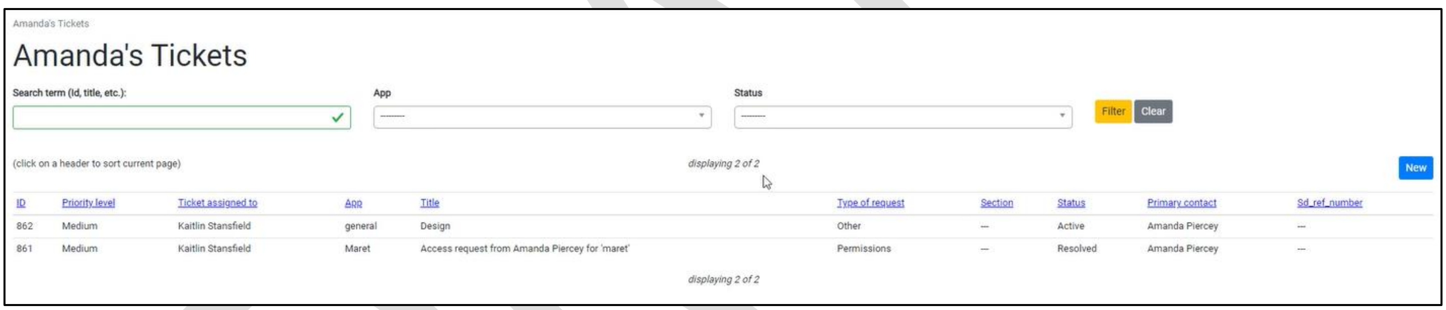
Priority level options are: High, Medium, Low, Wish List, and Urgent. If there is a high number of tickets, they will be prioritized based on urgency.

Please include as much detail as possible in the "Description" field.

Once you log a ticket you will receive a confirmation email, which will include a link that will bring you to that ticket in DM Apps. You will also be able to view the ticket by navigating back to the DM Apps home screen, then selecting DM Apps Tickets:



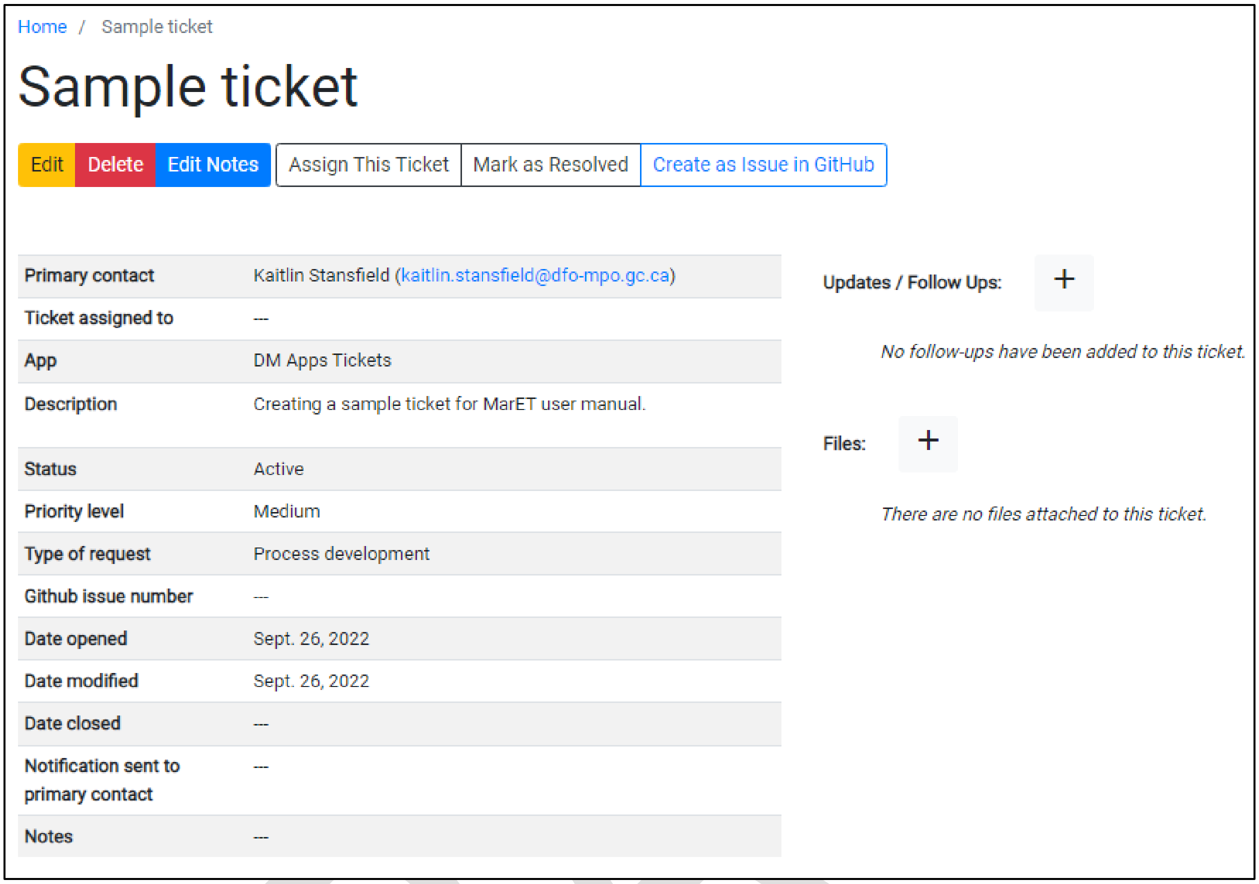
This will open a page that will list your active tickets. You can adjust the visible tickets by changing the drop-down filters. For example, in the below screenshot, the Status has been changed from "Active" to "---------", which allows you to see Active, Cancelled, Idle, Resolved, and Wishlist tickets:



ID	Priority level	Ticket assigned to	App	Title	Type of request	Section	Status	Primary contact	Sd_ref_number
862	Medium	Kaitlin Stansfield	general	Design	Other	---	Active	Amanda Piercey	---
861	Medium	Kaitlin Stansfield	Maret	Access request from Amanda Piercey for 'maret'	Permissions	---	Resolved	Amanda Piercey	---

displaying 2 of 2

If you select a given ticket, you can check on its status. You can also edit, update, delete, assign, or resolve it:

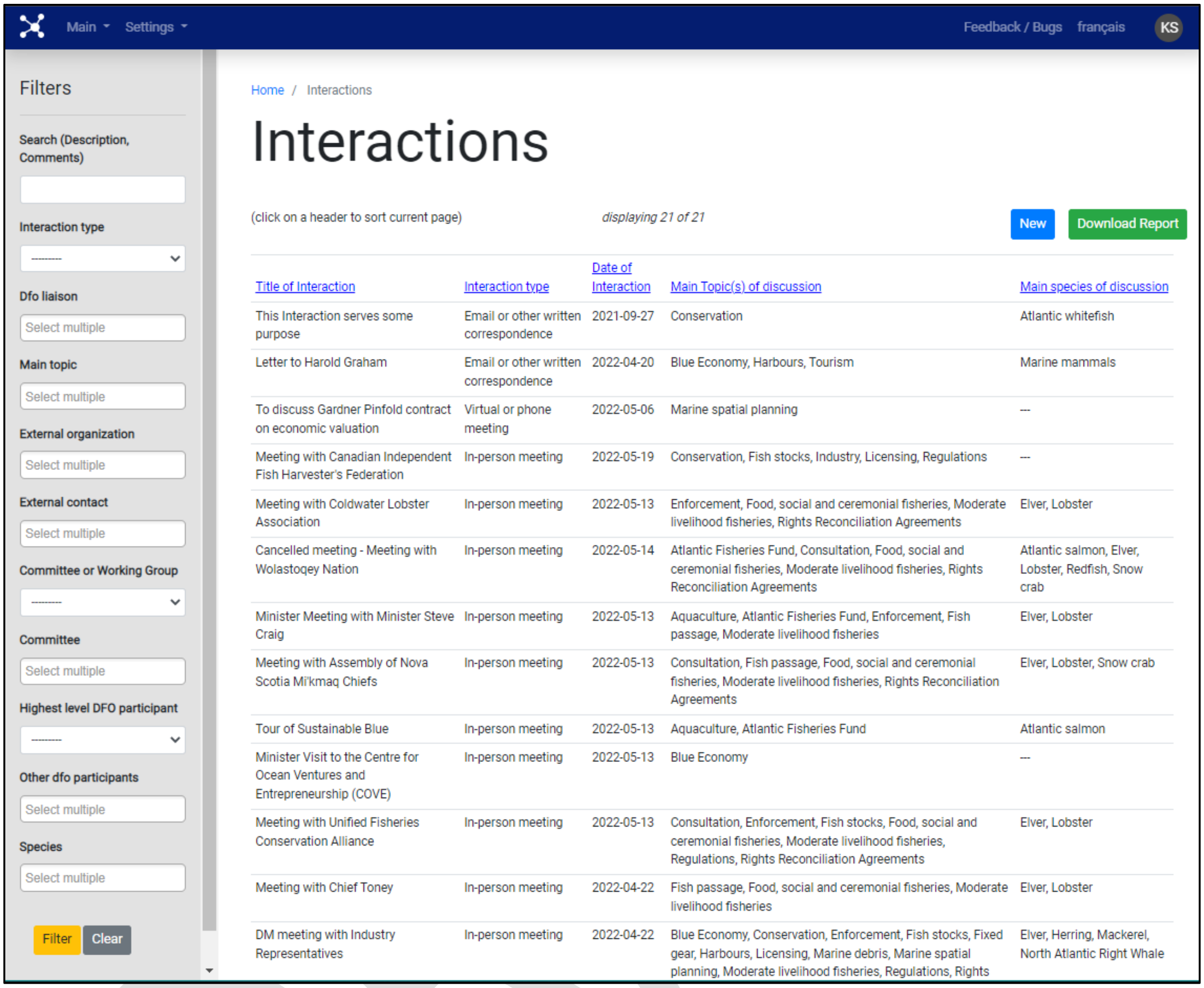


In addition, you can add update/follow up messages or attach files (e.g. screenshots) by clicking the + icons shown in the above picture.

Interactions

Interactions main page

The Interactions main page is accessible by either selecting the “Interactions” button on the MarET home screen, or by clicking the “Main” button on the header, then “Interactions”. That will bring you to this page:



Title of Interaction	Interaction type	Date of Interaction	Main Topic(s) of discussion	Main species of discussion
This Interaction serves some purpose	Email or other written correspondence	2021-09-27	Conservation	Atlantic whitefish
Letter to Harold Graham	Email or other written correspondence	2022-04-20	Blue Economy, Harbours, Tourism	Marine mammals
To discuss Gardner Pinfold contract on economic valuation	Virtual or phone meeting	2022-05-06	Marine spatial planning	---
Meeting with Canadian Independent Fish Harvester's Federation	In-person meeting	2022-05-19	Conservation, Fish stocks, Industry, Licensing, Regulations	---
Meeting with Coldwater Lobster Association	In-person meeting	2022-05-13	Enforcement, Food, social and ceremonial fisheries, Moderate livelihood fisheries, Rights Reconciliation Agreements	Elver, Lobster
Cancelled meeting - Meeting with Wolastoqey Nation	In-person meeting	2022-05-14	Atlantic Fisheries Fund, Consultation, Food, social and ceremonial fisheries, Moderate livelihood fisheries, Rights Reconciliation Agreements	Atlantic salmon, Elver, Lobster, Redfish, Snow crab
Minister Meeting with Minister Steve Craig	In-person meeting	2022-05-13	Aquaculture, Atlantic Fisheries Fund, Enforcement, Fish passage, Moderate livelihood fisheries	Elver, Lobster
Meeting with Assembly of Nova Scotia Mi'kmaq Chiefs	In-person meeting	2022-05-13	Consultation, Fish passage, Food, social and ceremonial fisheries, Moderate livelihood fisheries, Rights Reconciliation Agreements	Elver, Lobster, Snow crab
Tour of Sustainable Blue	In-person meeting	2022-05-13	Aquaculture, Atlantic Fisheries Fund	Atlantic salmon
Minister Visit to the Centre for Ocean Ventures and Entrepreneurship (COVE)	In-person meeting	2022-05-13	Blue Economy	---
Meeting with Unified Fisheries Conservation Alliance	In-person meeting	2022-05-13	Consultation, Enforcement, Fish stocks, Food, social and ceremonial fisheries, Moderate livelihood fisheries, Regulations, Rights Reconciliation Agreements	Elver, Lobster
Meeting with Chief Toney	In-person meeting	2022-04-22	Fish passage, Food, social and ceremonial fisheries, Moderate livelihood fisheries	Elver, Lobster
DM meeting with Industry Representatives	In-person meeting	2022-04-22	Blue Economy, Conservation, Enforcement, Fish stocks, Fixed gear, Harbours, Licensing, Marine debris, Marine spatial planning, Moderate livelihood fisheries, Regulations, Rights	Elver, Herring, Mackerel, North Atlantic Right Whale

This page shows all interactions recorded in the tool to date. You can click on a header (i.e. the blue linked text, “Title of interaction”, “Interaction type”, etc.) to sort items. Meaning, if you click “Title of interactions”, the interactions will be displayed in alphabetical order by title. The “Date of Interaction” is displayed in the format YYYY-MM-DD, to allow for chronological sorting if “Date of Interaction” is selected. Entries automatically appear in the order in which they were created.

You can also adjust which interactions you are able to see using the filter and search options in the grey sidebar to the left of the page. After adding a new filter criterion, the list of interactions will automatically be adjusted accordingly. The “Search” option at the top of the Filters column will search the “Title of Interaction”, “Main results”, and “Comments” fields. For filters that allow for multiple selections (indicated with the grey text “Select multiple”), you can start typing in the text box to search for the item you are looking for. Once you see it, click on it or hit Enter with it highlighted in blue and wait for the list of interactions to adjust, then you can start typing to search the next item you would like to select.

If you would like to get rid of the filters and searches that you have applied, click the "Clear" button at the bottom of the column.

Download a report

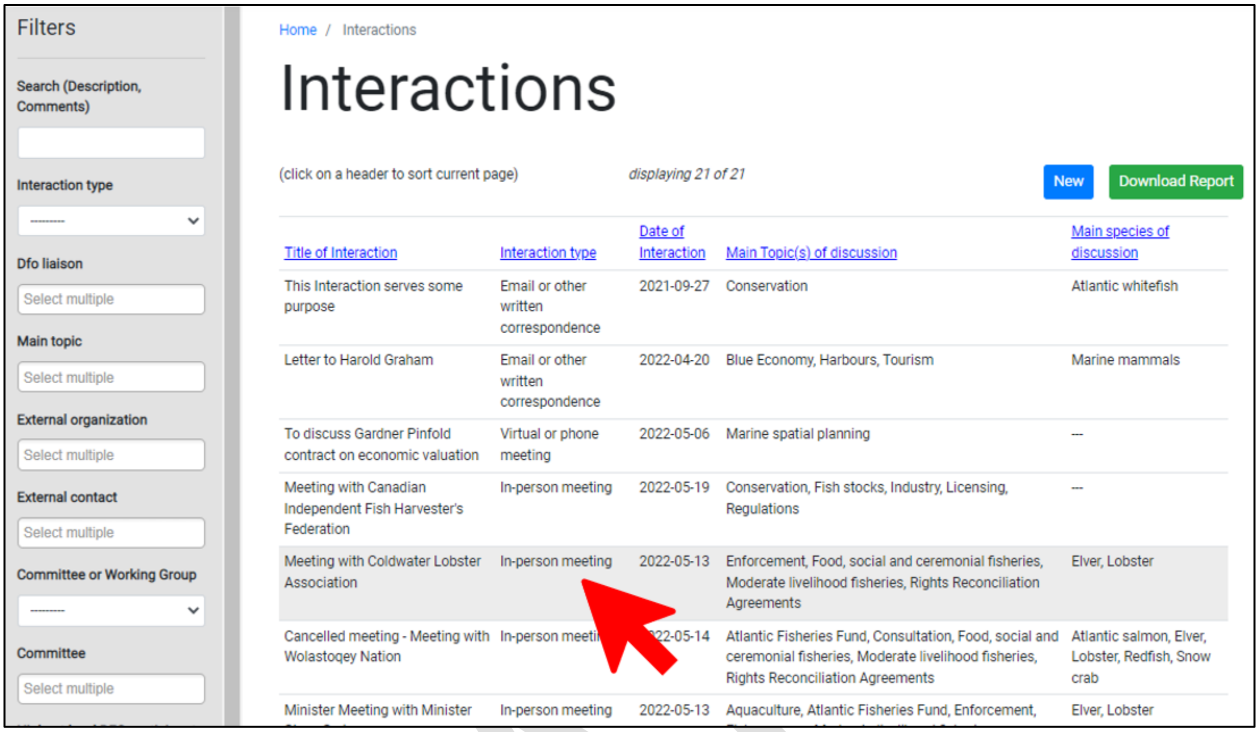
At any point, it is possible to generate a report of whichever information is currently visible on the page by clicking the green "Download Report" button.

Once you click that button, an Excel workbook will be downloaded containing all of the information that is visible on the screen given the filters and searches that have been applied.

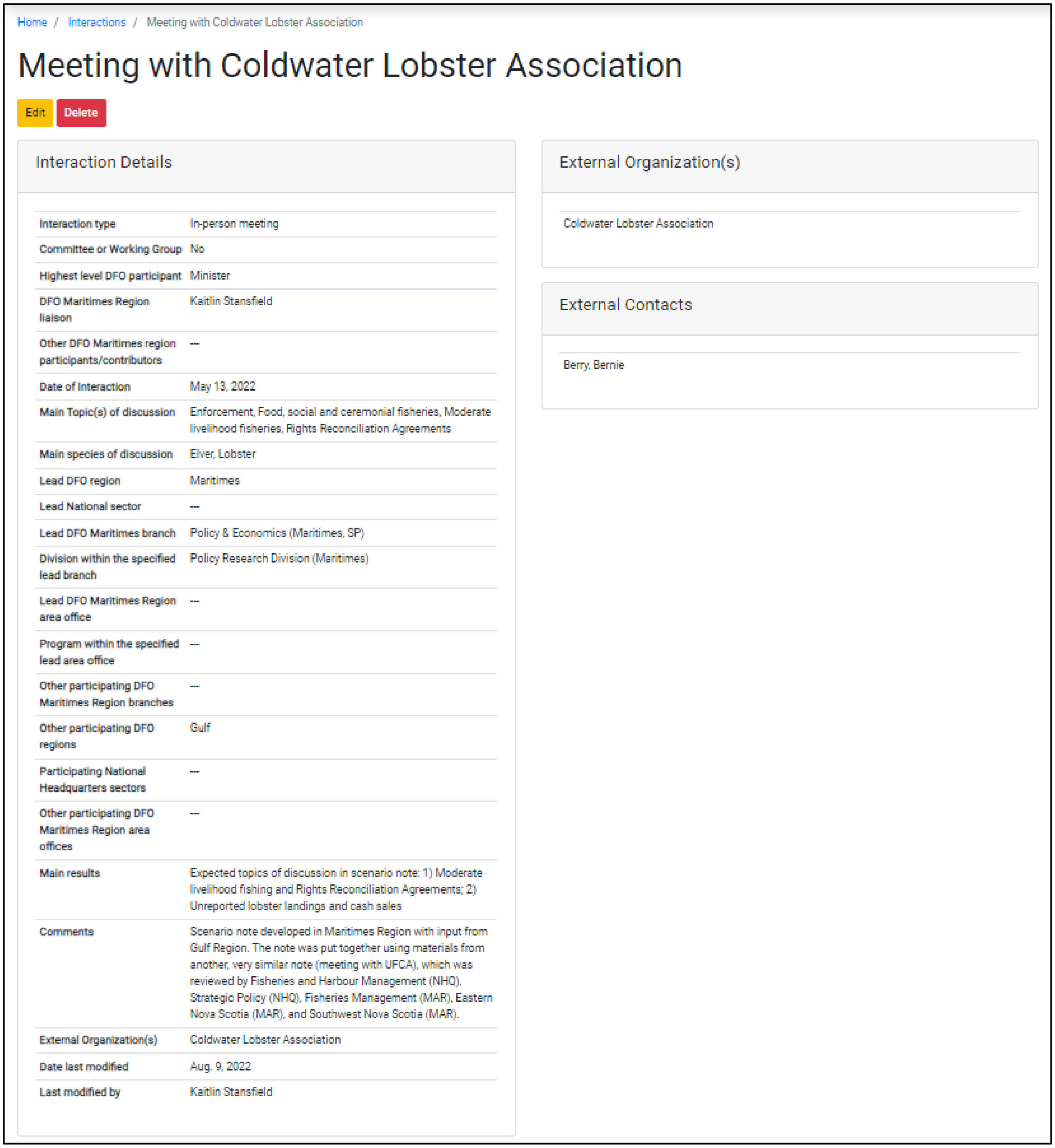
Interaction information

You can click on an interaction to see more information.

Back to top



If you select an interaction from the Interactions main page (as shown above), or if you select it from the page for a relevant external contact, external organization, or committee/working group, you will see a page similar to the following:


Home / Interactions / Meeting with Coldwater Lobster Association

Meeting with Coldwater Lobster Association

Edit Delete

Interaction Details

Interaction type	In-person meeting
Committee or Working Group	No
Highest level DFO participant	Minister
DFO Maritimes Region liaison	Kaitlin Stansfield
Other DFO Maritimes region participants/contributors	---
Date of Interaction	May 13, 2022
Main Topic(s) of discussion	Enforcement, Food, social and ceremonial fisheries, Moderate livelihood fisheries, Rights Reconciliation Agreements
Main species of discussion	Elver, Lobster
Lead DFO region	Maritimes
Lead National sector	---
Lead DFO Maritimes branch	Policy & Economics (Maritimes, SP)
Division within the specified lead branch	Policy Research Division (Maritimes)
Lead DFO Maritimes Region area office	---
Program within the specified lead area office	---
Other participating DFO Maritimes Region branches	---
Other participating DFO regions	Gulf
Participating National Headquarters sectors	---
Other participating DFO Maritimes Region area offices	---
Main results	Expected topics of discussion in scenario note: 1) Moderate livelihood fishing and Rights Reconciliation Agreements; 2) Unreported lobster landings and cash sales
Comments	Scenario note developed in Maritimes Region with input from Gulf Region. The note was put together using materials from another, very similar note (meeting with UFCA), which was reviewed by Fisheries and Harbour Management (NHQ), Strategic Policy (NHQ), Fisheries Management (MAR), Eastern Nova Scotia (MAR), and Southwest Nova Scotia (MAR).
External Organization(s)	Coldwater Lobster Association
Date last modified	Aug. 9, 2022
Last modified by	Kaitlin Stansfield

External Organization(s)

Coldwater Lobster Association

External Contacts

Berry, Bernie

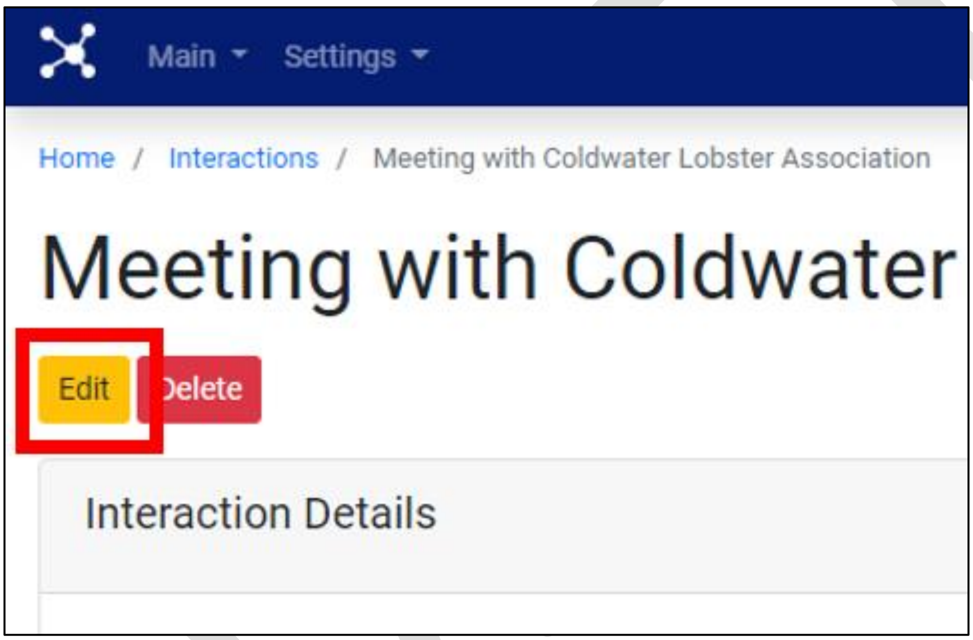
This page consists of three main sections: “Interaction Details”, “External Organization(s)”, and “External Contacts”. You can click on external organizations and external contacts to see more information.

Most of the information on this page is what was entered when the interaction was created (more on creating a new interaction is found in a later section), with a few exceptions.

Some of the data fields you see on this page may not have been visible when the interaction was first created. That is because they would only have appeared if a previous data field was filled differently. These conditional data fields include: “Lead National Sector” (when creating a new interaction, this field is only visible if “Lead DFO Region” is National); “Division within the specified lead branch” (only visible if a “Lead DFO Maritimes branch” is selected); “Program within the specified lead area office” (only visible if a “Lead DFO Maritimes Region area office” is selected); and “Participating National Headquarters sectors” (only visible if National is selected as an “Other participating DFO region”). Furthermore, the “Date last modified” and the “Last modified by” fields are filled automatically, so they would not have been filled when the interaction was created.

Editing an existing interaction

You can edit an existing interaction at any time by clicking the yellow “Edit” button on an interaction’s information page.

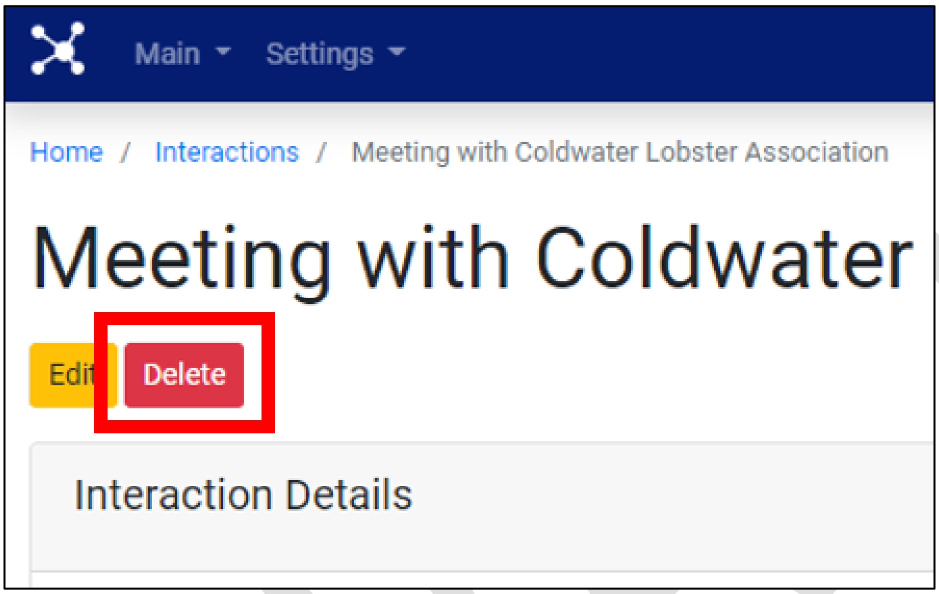


This will allow for changes to be made to any of the editable data fields (more information on filling in those data fields is provided below in the “Creating a new interaction” section). Once you are finished making edits, click “Save” at the bottom of the page. This will implement the edits. The “Date last modified” and the “Last modified by” fields will be updated automatically to reflect the edits.

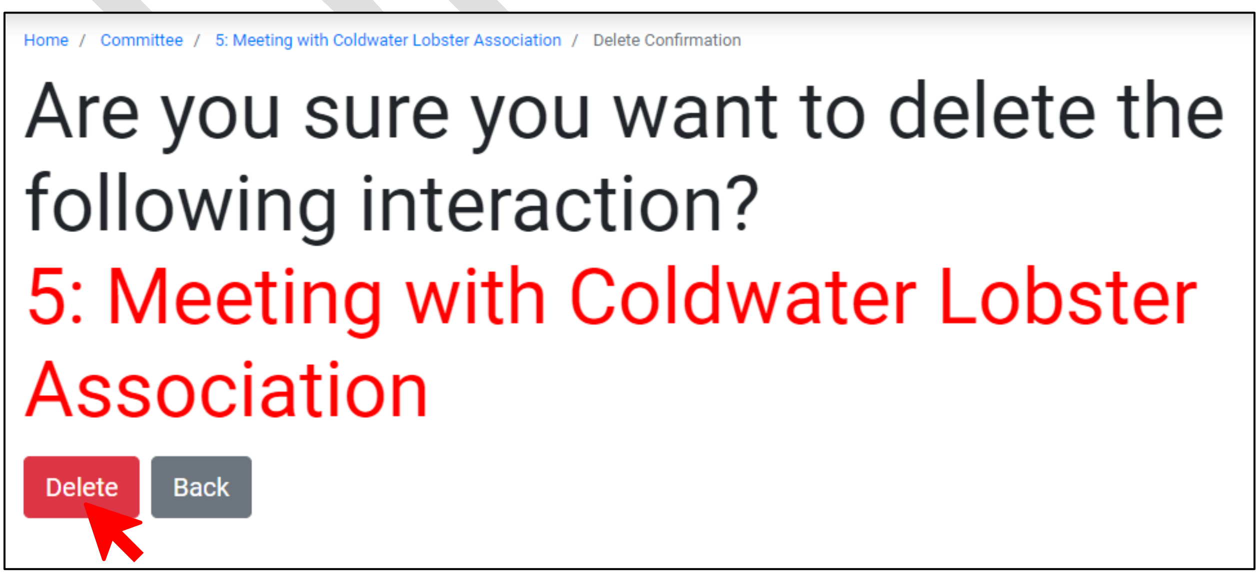
If you are not the “DFO Maritimes Region liaison” listed for the interaction, it is recommended that you check in with the liaison before editing an interaction. If there is no liaison listed, it is recommended that you check in with the last person to have modified the interaction.

Deleting an existing interaction

There are many different situations in which an interaction may need to be deleted. However, it is suggested that even if a planned interaction does not go ahead, that the interaction not be deleted, and instead be renamed so that the word "Cancelled" is included in the interaction's title. It could still be helpful for colleagues to know if a planned interaction was cancelled. If for whatever reason an interaction should actually be deleted, this can be done at any time by clicking the red "Delete" button on an interaction's information page:



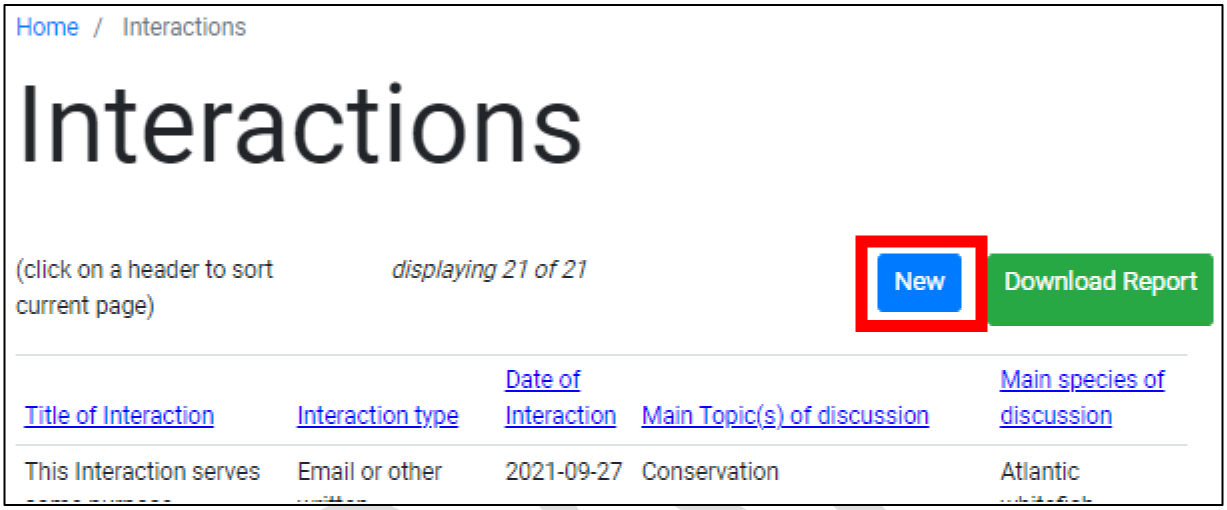
This will open up another page, as shown below, asking if you are sure that you want to delete the interaction. This is to prevent an accidental deletion. If you are sure that you would like to delete the interaction, click "Delete".



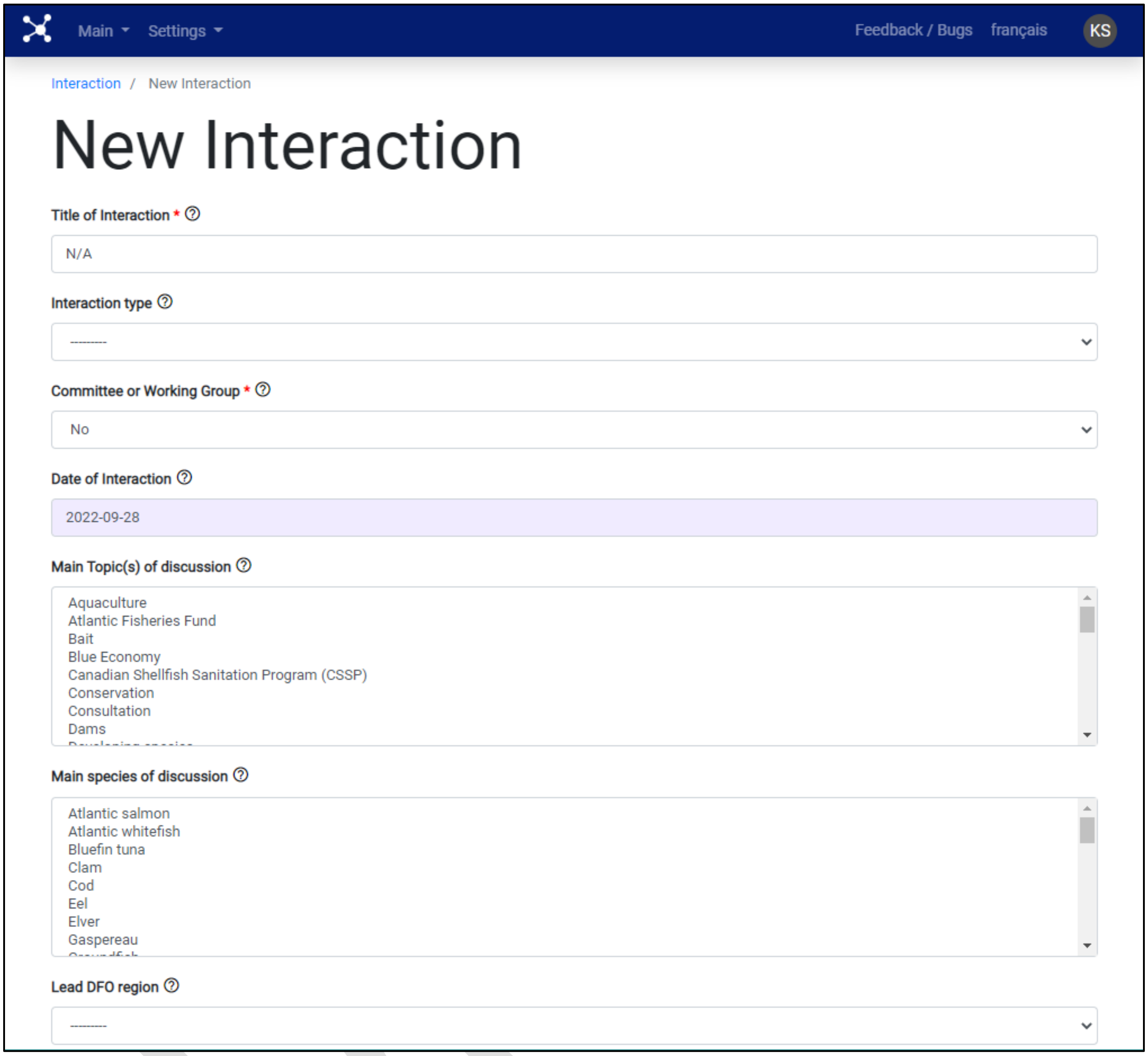
If you are not the “DFO Maritimes Region liaison” listed for the interaction, it is recommended that you check in with the liaison before deleting an interaction. If there is no liaison listed, it is recommended that you check in with the last person to have modified the interaction.

Creating a new interaction

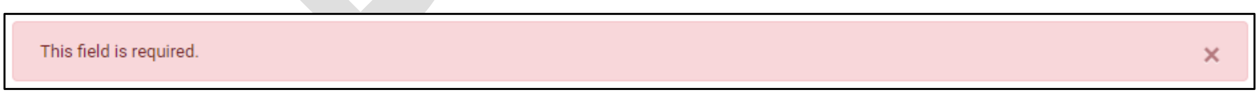
To record a new interaction, click the “New” button from the Interactions main page.



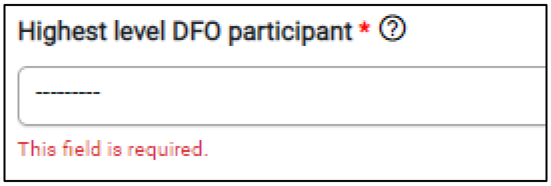
This will open the New Interaction page:



The red asterisks on this page indicate required fields. If you click “Add” at the bottom of the page before filling out the required fields, you will receive the following error message at the top of the page:

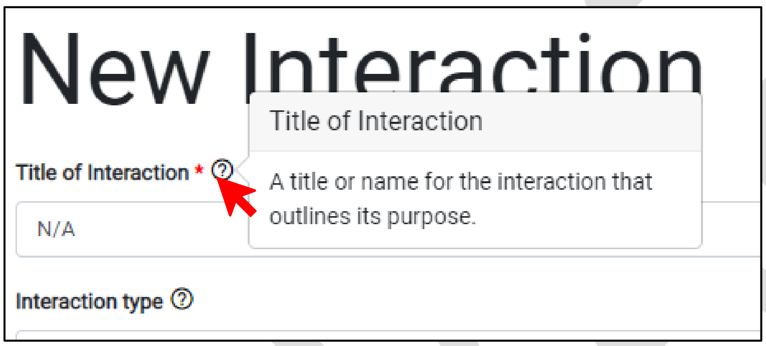


Red text will appear below the field that requires input:



There are very few required fields. This is in part because if a future interaction is being added, some details may not yet be available. It is also in acknowledgment that different interactions may have different amounts of available information. However, it is recommended that as many fields be filled out as possible for the purposes of information sharing, and to make it easier to find the interaction through filtering and sorting on the Interactions main page.

Most data fields on this page have associated help text, indicated with the ⓘ symbol. If you hover your cursor over the question mark, instructions and other details will appear. For example:



The following table provides an overview of interaction data fields, most of which is included in the existing help text:

Field name	Description	Instructions
Title of interaction	A title or name for the interaction that outlines its purpose.	Text field.
Interaction type	Please indicate how the interaction took place (email or other written correspondence, in-person meeting, etc.).	Select one from the list. If the correct interaction type is not listed, please leave the field blank for now and submit a ticket using the "Feedback / Bugs" feature at the top right of the window to flag the missing interaction type.
Committee or Working Group	Please indicate whether the interaction is associated with a committee or working group. If the answer is Yes, then the below field will be visible, and many subsequent data fields will be autopopulated based on	Yes/No dropdown. This is a required field, defaults to No.

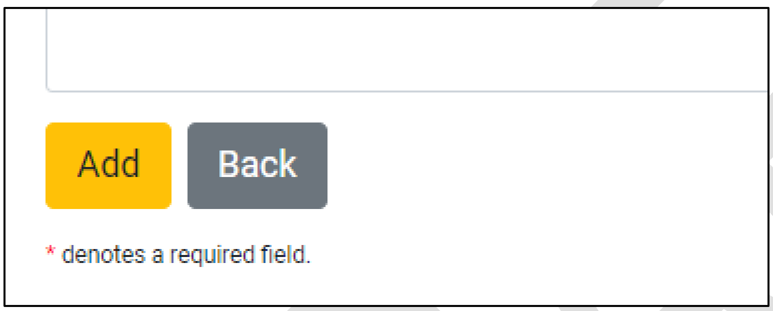
Field name	Description	Instructions
	the information saved about the committee or working group.	
Committee / Working Group	Please select the associated committee or working group from the list. If the committee or working group is not listed, please create it through the Committees page. As mentioned above, once the relevant committee or working group is selected, many of the following fields will be pre-populated based on the information saved about that committee or working group. This is to reduce reporting burden/duplication. Feel free to adjust the pre-populated fields to better align with this one interaction, as needed.	Dropdown with search. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.
Date of Interaction	Please indicate when the interaction took or will take place. If the exact date is not yet known, please indicate the best guess.	Click the pre-entered text to access a drop-down calendar.
Main topics of discussion	Please indicate topics that were raised or are expected to be raised over the course of the interaction. Options are listed for selection to facilitate easy sorting of interactions. If you would like to request an addition to the list, please submit a ticket using the "Feedback / Bugs" feature at the top right of the screen.	Please select all relevant topics. Multiple selections are possible by clicking while holding down the Ctrl key.
Main species of discussion	Please indicate species that were discussed or are expected to be discussed over the course of the interaction. Options are listed for selection to facilitate easy sorting of interactions. Multiple selections may be relevant for the same species (e.g. North Atlantic Right Whale and marine mammals). Please select all relevant options, to help with any future searches or reports. If you would like to request an addition to the list, please submit a ticket using the "Feedback / Bugs" feature at the top right of the screen.	Please select all relevant species. Multiple selections are possible by clicking while holding down the Ctrl key.
Lead DFO region	Please indicate which DFO region is the departmental lead/coordinator for this interaction.	Dropdown list, only one selection is possible.
Lead National sector	Please indicate which national headquarters-based DFO sector is the lead/coordinator for this interaction. This field is visible if the "Lead DFO region" (previous data field) is National. If a sector's name has changed, or if a sector is missing, please indicate this using	Searchable dropdown list, only one selection is possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.

Field name	Description	Instructions
	the "Feedback / Bugs" feature at the top right of the screen.	
Lead DFO Maritimes branch	Given that MarET is a Maritimes Region tool, it is assumed that all interactions will involve Maritimes Region staff, and that the work of these staff will be led by either one branch in regional headquarters, or one area office. If Maritimes Region's participation in the interaction is led or coordinated by staff in regional headquarters (as opposed to staff in area offices), please select the relevant branch. If Maritimes Region participation is led by an area office, see next field. If a branch's name has changed, please indicate this using the "Feedback / Bugs" feature at the top right of the screen. Branch names are followed by the region name and the relevant national sector name in parentheses.	Dropdown list, only one selection is possible.
Division within the specified lead branch	This field appears if a "Lead DFO Maritimes branch" is selected. Please select the specific division within the lead Maritimes branch that is leading on or coordinating this interaction for DFO Maritimes Region. If a division's name has changed or is missing, please indicate this using the "Feedback / Bugs" feature at the top right of the screen. Division names are followed by "Maritimes" in parentheses.	Dropdown list, only one selection is possible.
Lead DFO Maritimes Region area office	Please select the area office that leads for DFO Maritimes Region (if led out of regional headquarters, see above fields, "Lead DFO Maritimes branch", and subsequently "Division within the specified lead branch").	Dropdown list, only one selection is possible.
Program within the specified lead area office	Please select the specific program within the above "Lead DFO Maritimes Region area office" that is leading on or coordinating this interaction for DFO Maritimes Region. If a program's name has changed or is missing, please indicate this using the "Feedback / Bugs" feature at the top right of the screen.	Dropdown list, only one selection is possible.
Other participating DFO Maritimes Region branches	Please indicate all other DFO Maritimes Region branches that are participating in or contributing to the interaction. If a branch's name has changed or is missing, please	Multiple selections are possible by clicking while holding down the Ctrl key.

Field name	Description	Instructions
	indicate this using the "Feedback / Bugs" feature at the top right of the screen.	
Other participating DFO Maritimes Region area offices	Please indicate all other DFO Maritimes Region area offices participating in or contributing to the interaction.	Multiple selections are possible by clicking while holding down the Ctrl key.
Other participating DFO regions	Please indicate all other DFO regions participating in or contributing to the interaction.	Multiple selections are possible by clicking while holding down the Ctrl key.
Participating National Headquarters sectors	This is only visible if National is selected in the "Other participating DFO regions" field. Please indicate all national headquarters-based DFO sectors participating in or contributing to the interaction. If a sector's name has changed or is missing, please indicate this using the "Feedback / Bugs" feature at the top right of the screen.	Multiple selections are possible by clicking while holding down the Ctrl key.
Highest level DFO participant	Please indicate the highest-ranking DFO official present at the meeting or otherwise involved in the interaction.	Dropdown, searchable list. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted. Only one selection is possible.
External Contact(s)	Please list external contacts involved in the interaction. If the relevant contact is not listed, please add them to MarET via the Contacts page.	The list is searchable and multiple selections are possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.
External organization(s)	Please list external organizations involved in the interaction. If the relevant organization is not listed, please add it to MarET via the Organizations page.	The list is searchable and multiple selections are possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.
DFO Maritimes Region liaison	Please indicate the main coordinator or lead for this interaction for Maritimes Region. This is the person who staff can reach out to if they would like to learn more. The list contains names of people who have DM Apps accounts. If the liaison(s) do not have DM Apps accounts, they will need to create one to be on the list (see above section "Signing onto DM Apps").	The list is searchable and multiple selections are possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.
Other DFO Maritimes Region	Please indicate all DFO Maritimes staff involved, if known. The list contains names of	The list is searchable and multiple selections are

Field name	Description	Instructions
participants / contributors	people who have DM Apps accounts. If the participant(s) do not have DM Apps accounts, they will need to create one to be on the list (see above section "Signing onto DM Apps").	possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.
Main results	Please indicate what the main results (i.e. actions, decisions, requests, etc.) were for this interaction	Text field.
Comments	Please include any additional comments or considerations to flag.	Text field.

Once you have finished filling in the necessary data fields, click the yellow "Add" button at the bottom of the page. If you do not wish to save your work, either click the grey "Back" button, or navigate away from the page.



Committees / Working Groups

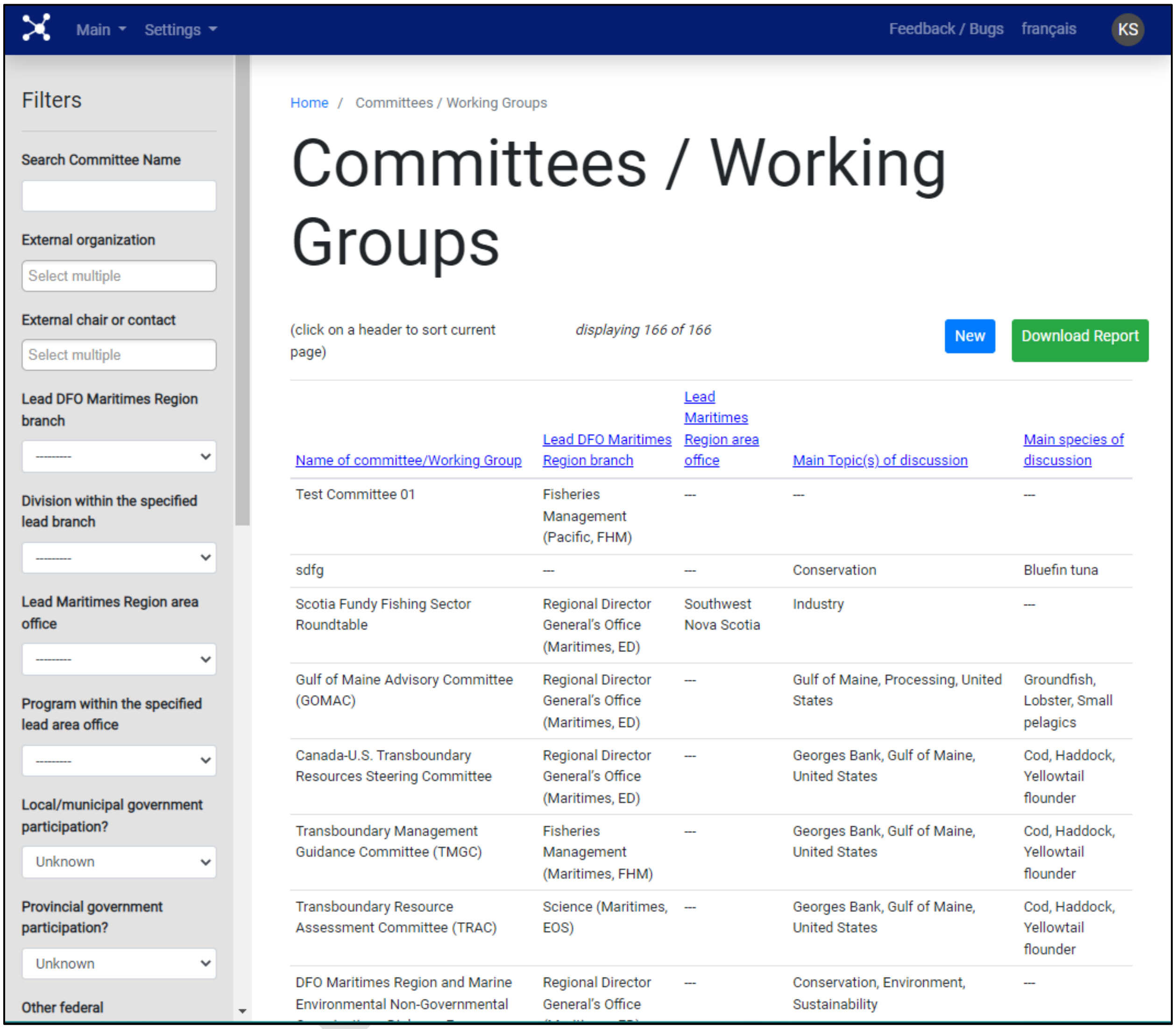
This component of MarET keeps a record of committees, working groups, or similar established tables where DFO Maritimes Region staff meet with external partners or stakeholders. In this context, "external" refers to any person or organization outside of DFO.

This component of the tool will help to keep track of various committees or working groups that may exist for a given topic, or may help to show how many committees or working groups a given partner or stakeholder may participate in, etc. The committees / working groups component of the tool is also intended to make it easier to document interactions and to quickly sort interactions by committee or working group. As indicated in the "Creating a new interaction" section above, when creating an interaction for a given committee or working group, most of the data fields can be pre-populated based on the information that is saved in MarET about that committee or working group.

There is already a considerable amount of information available in the tool about existing committees and working groups gathered over the course of the Stakeholder and Partner Engagement Project, but may require updates. When starting out with MarET, it is recommended that before creating a new committee or working group, you do a quick search first to make sure that it does not already exist in the system.

Committees / Working Groups main page

The Committees / Working Groups main page is accessible by either selecting the “Committees” button on the MarET home screen, or by clicking the “Main” button on the header, then “Committees”. That will bring you to this page:



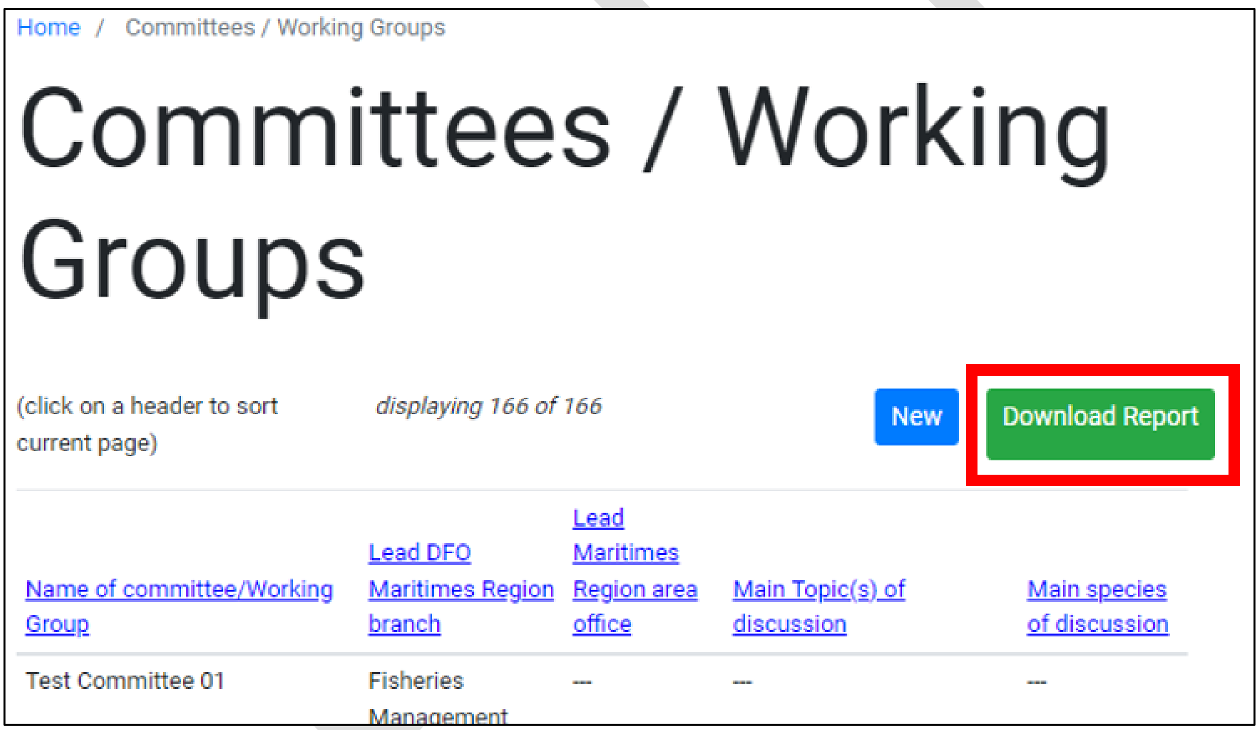
The page shows all committees and working groups recorded in the tool to date. You can click on a header (i.e. the blue linked text, “Name of committee/Working Group”, “Lead DFO Maritimes Region branch”, etc.) to sort items. Meaning, if you click “Name of committee/Working Group”, the committees and working groups will be sorted in alphabetical order by title.

You can also adjust which committees and working groups you are able to see using the filter and search items on the left of the page. After adding a new filter criterion, the list of committees and working groups will automatically be adjusted accordingly. The “Search” option at the top of the Filters column will search the committee / working group name, role, and comments fields. For filters that allow for multiple selections (indicated with the grey text “Select multiple”), you can start typing in the text box to search for the item you’re looking for. Once you see it, either click on it or press Enter with it highlighted in blue, wait for the list of committees and working groups to adjust, and then you can start typing to search for the next item you’d like to select. For the filter options with scroll bars on the side (the “Other participating DFO Maritimes Region branches” and “Other participating DFO Maritimes Region area offices”), multiple selections are possible by clicking while holding down the Ctrl key.

If you would like to get rid of the filters and searches you have applied, click the “Clear” button at the bottom of the column.

Download a report

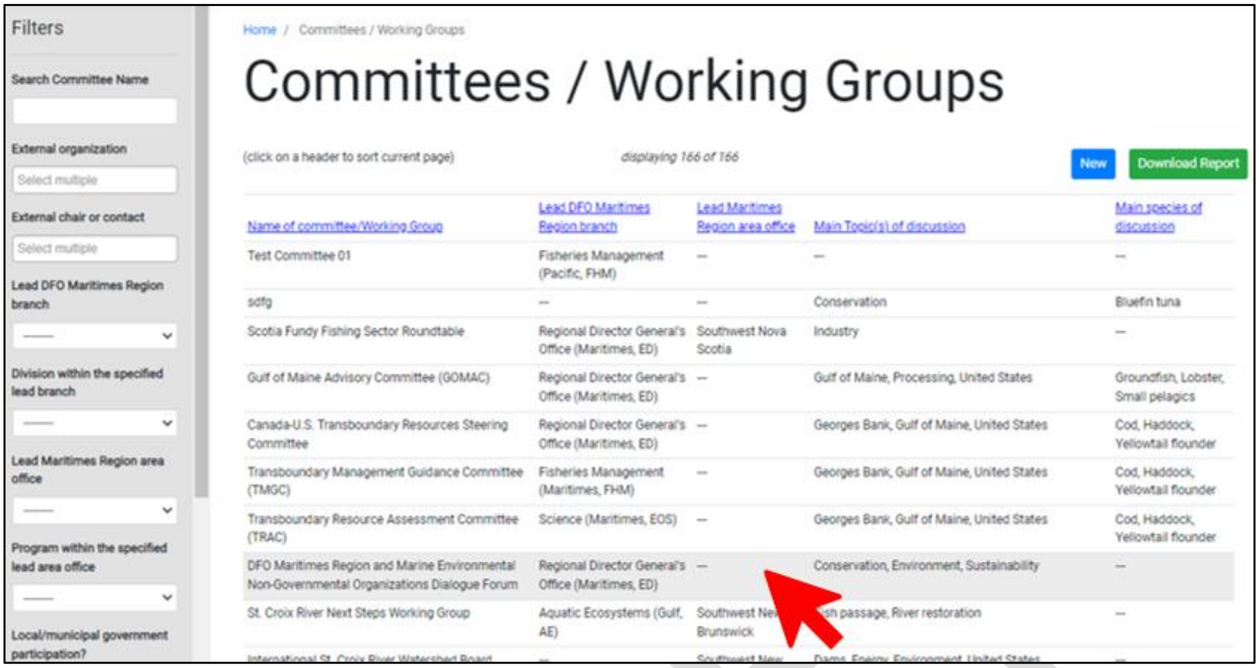
At any point, it is possible to generate a report of whichever information is currently visible on the page by clicking the green “Download Report” button.



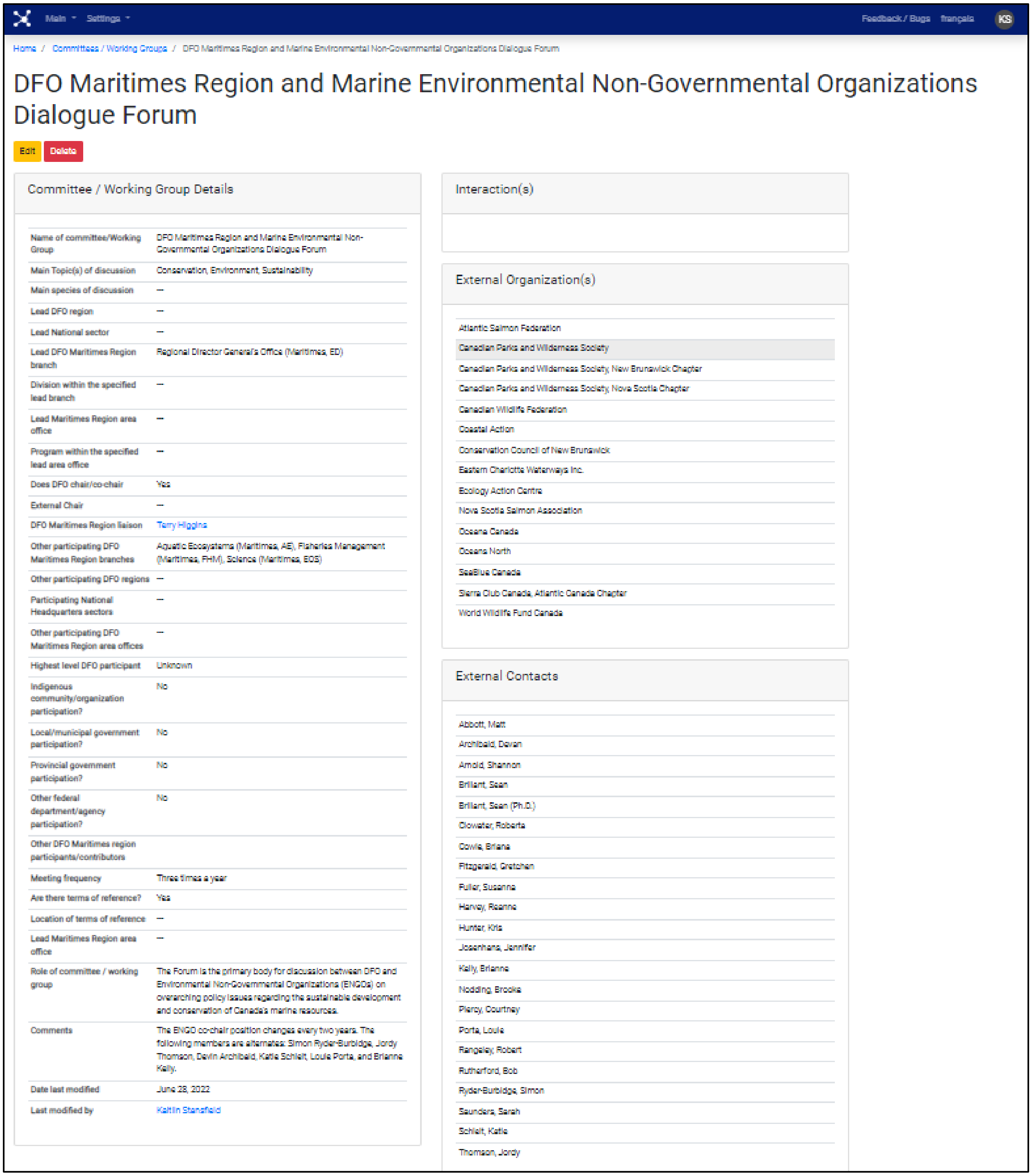
Once you click that button, an Excel workbook will be downloaded containing all of the information that is visible on the screen given the filters and searches that have been applied.

Committee / Working Group information

You can click on a particular committee or working group to see more information:



If you select a committee or working group from the Committees / Working Groups main page (as shown above), or if you select it from the page for a relevant external contact, external organization, or interaction, you will see a page similar to the following:



This page consists of three main sections: “Committee / Working Group Details”, “Interaction(s)”, “External Organization(s)”, and “External Contacts”. The interactions, external organizations, and external contacts can each be clicked to see more information.

Besides the list of interactions, which are generated when new interactions are created for the committee or working group, most of the information on this page is what was entered when the committee or working group was created (more on creating a new committee or working group in a later section), with a few exceptions.

Some of the data fields you see on this page may not have been visible when the committee or working group was first created. That is because they would only have appeared if a previous data field were filled differently. These conditional data fields include: "Lead National Sector" (when creating a new committee or working group, this field is only visible if "Lead DFO region" is National); "Division within the specified lead branch" (only visible if a "Lead DFO Maritimes branch" is selected); "Program within the specified lead area office" (only visible if a "Lead DFO Maritimes Region area office" is selected); "Participating National Headquarters sectors" (only visible if National is selected as an "Other participating DFO region"); and "Location of terms of reference" (only visible if it is indicated that there is a terms of reference). Furthermore, the "Date last modified" and the "Last modified by" fields are filled automatically, so they would not have been filled when the committee or working group was created.

Editing an existing committee / working group

You can edit an existing committee or working group at any time by clicking the yellow "Edit" button on a committee or working group's information page.

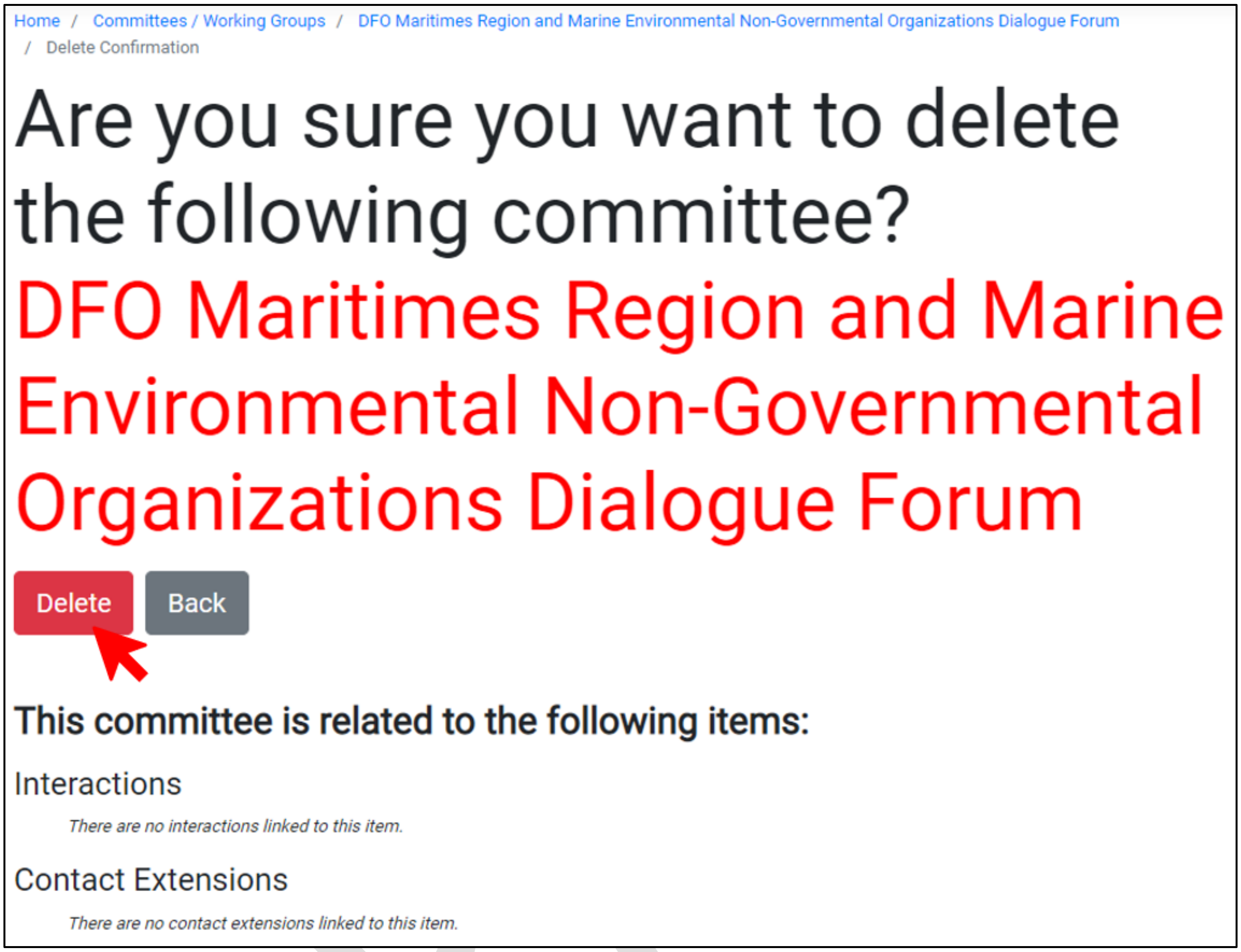
This will allow for changes to be made to any of the editable data fields (more information on filling those data fields is provided below under "Creating a new committee / working group"). Once you are finished making edits, click "Save" at the bottom of the page. This will implement the edits. The "Date last modified" and the "Last modified by" fields will be updated automatically to reflect the edits.

If you are not the DFO Maritimes Region liaison listed for the committee or working group, it is recommended that you check in with the liaison before editing. If there is no liaison listed, it is recommended that you check in with the last person to have modified the committee or working group.

Deleting an existing committee / working group

It is recommended that a committee or working group not be deleted if it is no longer active. Instead, the committee or working group's name can be edited to include the word "Inactive". Even if a committee or working group is no longer in use, it could still be beneficial to colleagues to be able to see its past information and interactions. However, if it is necessary to delete an existing committee or working group (for example, if it is a duplication), this can be done at any time by clicking the red "Delete" button on a committee or working group's information page.

This will open up another page, as shown below, asking if you are sure that you want to delete the committee or working group. This is to prevent an accidental deletion. The interactions associated with the committee or working group will be listed, if any exist.

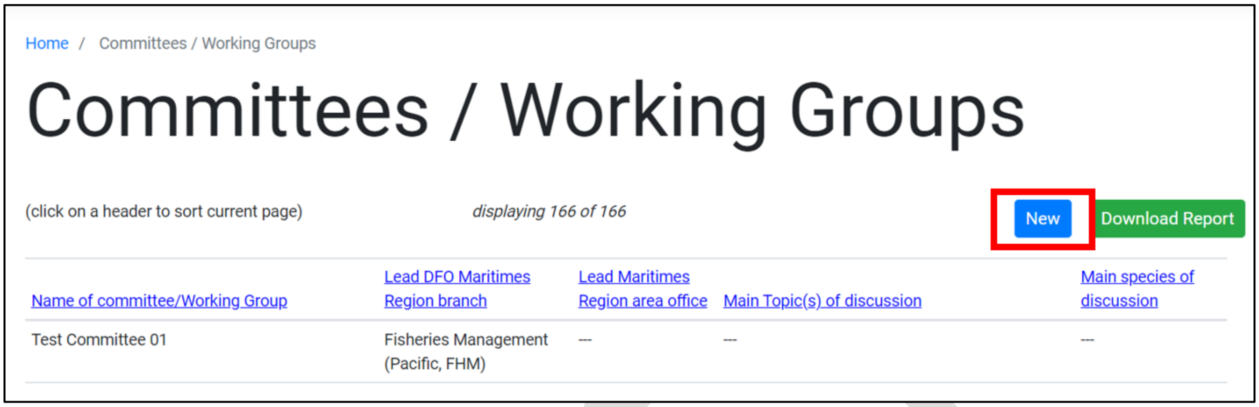


If there are interactions listed, you will not be able to delete the committee or working group (a Server Error will appear – working on changing this so that instead this second "Delete" is not clickable). If you would like to delete this committee or working group, you will need to either: a) edit these linked interactions so that the "Committee or working group" fields indicate No, or b) associate the interactions with different committees or working groups (see earlier section about editing an existing interaction), or c) delete these interactions (not recommended, as this information could still be useful. See earlier section about deleting an existing interaction). Note – there is currently a bug preventing users from severing their link to a committee or working group. This is being fixed. Once these interactions are no longer associated with the committee or working group, you can delete that committee or working group.

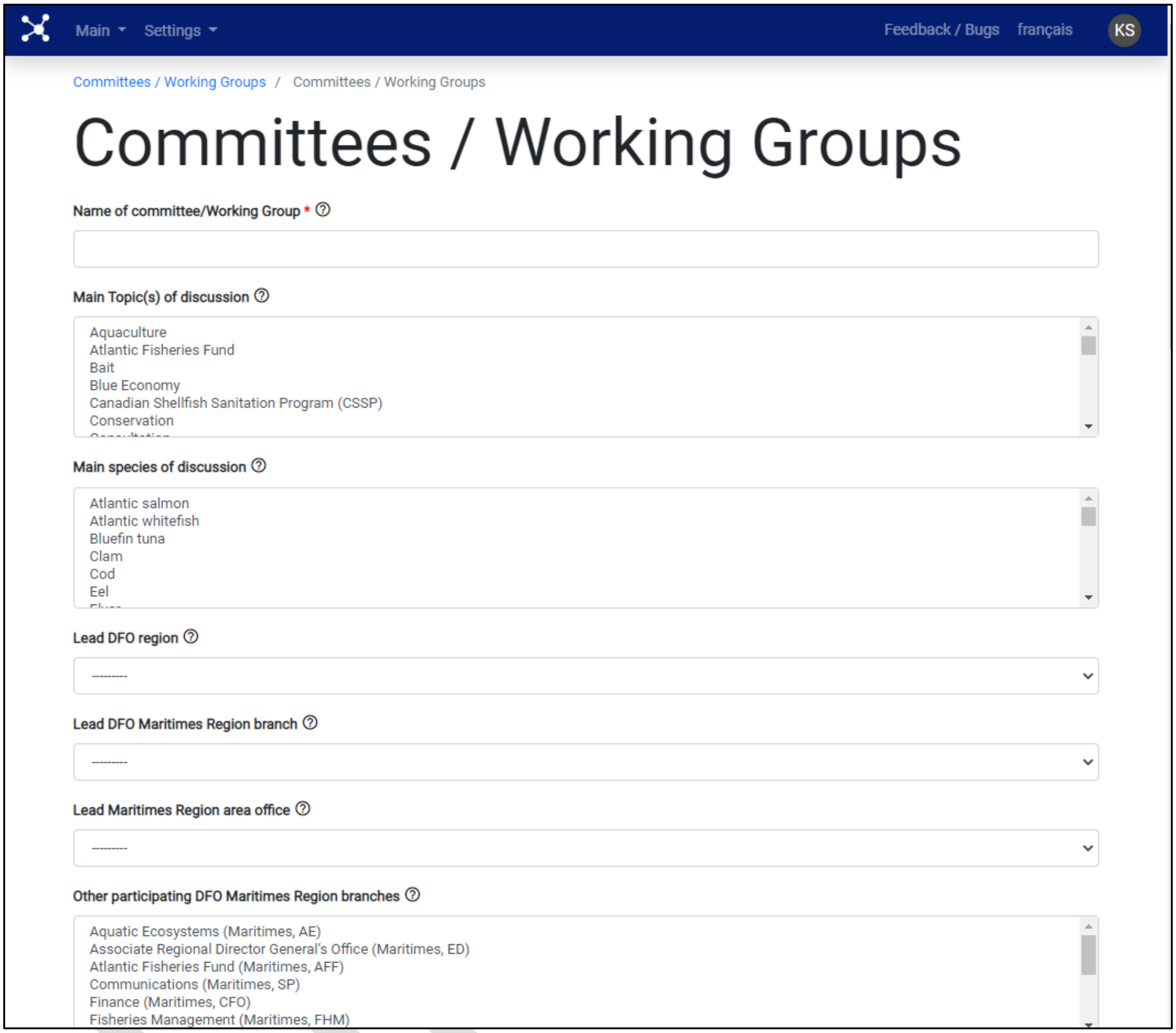
If you are not the DFO Maritimes Region liaison listed for the committee or working group, it is recommended that you check in with the liaison before deleting the committee or working group. If there is no liaison listed, it is recommended that you check in with the last person to have modified the committee or working group.

Creating a new committee / working group

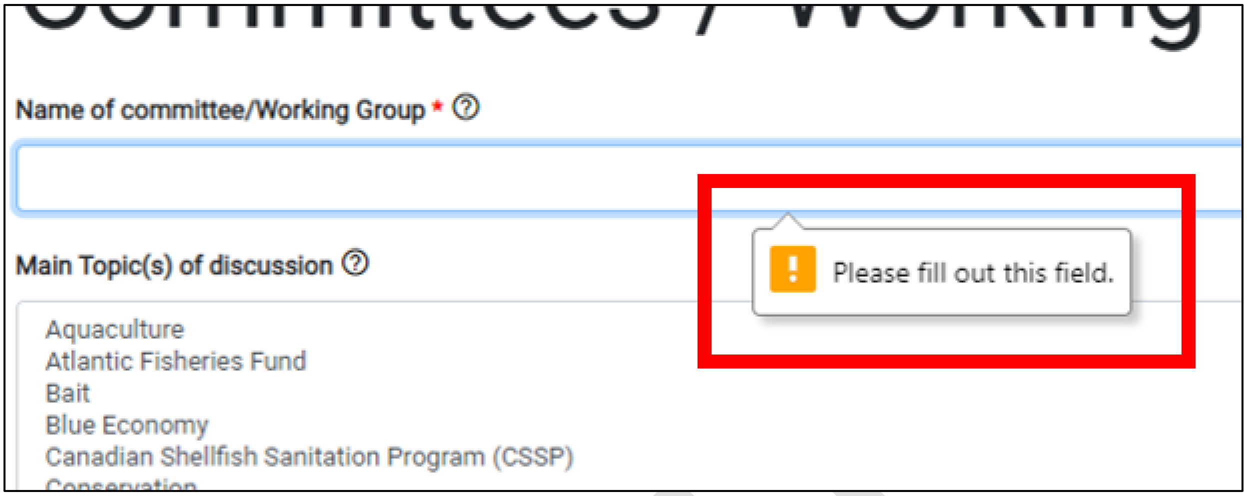
To create a new committee or working group, click the “New” button from the Committees / Working Groups main page.



This will open the following page:

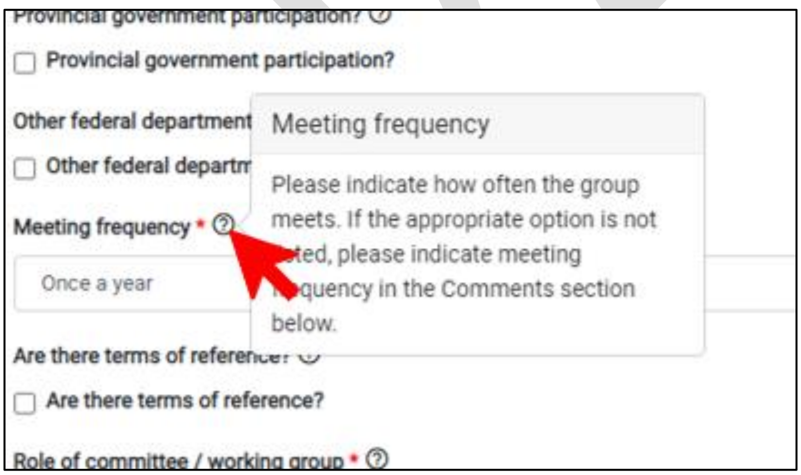


The red asterisks on this page indicate required fields. If you click “Add” at the bottom of the page before filling out the required fields, you will receive the following error message:



There are very few required fields. However, it is recommended that as many fields be filled out as possible for the purposes of information sharing, and to make it easier to find the committee or working group through filtering and sorting on the Committees / Working Groups main page. Furthermore, if a good deal of information is entered about the committee or working group, creating interactions for this committee or working group will be easier because the interaction will be auto-populated with that information.

Most data fields on this page have associated help text, indicated with the ⓘ symbol. If you hover your cursor over the question mark, instructions and other details will come up. For example:



The following table provides an overview of committee / working group data fields, most of which is included in the existing help text:

Field name	Description	Instructions
Name of committee/working group	The full, official name of the committee or working group.	Text field. Please write out any acronyms.
Main topic(s) of discussion	Please indicate topics that are usually discussed by this group. Options are listed for selection to facilitate easy sorting of interactions. If you would like to request an addition to the list, please submit a ticket using the “Feedback / Bugs” feature at the top right of the screen.	Please select all relevant topics. Multiple selections are possible by clicking while holding down the Ctrl key.
Main species of discussion	Please indicate species that are usually discussed by this group. Options are listed for selection to facilitate easy sorting of interactions. Multiple selections may be relevant for the same species (e.g. North Atlantic Right Whale and marine mammals). Please select all relevant options, to help with any future searches or reports. If you would like to request an addition to the list, please submit a ticket using the “Feedback / Bugs” feature at the top right of the screen.	Please select all relevant species. Multiple selections are possible by clicking while holding down the Ctrl key.
Lead DFO region	Please indicate which DFO region is the departmental lead/coordinator for this group.	Dropdown list, only one selection is possible.
Lead National sector	Please indicate which national headquarters-based DFO sector is the lead/coordinator for this interaction. This field is visible if the “Lead DFO region” is National. If a sector’s name has changed or is missing, please indicate this using the “Feedback / Bugs” feature at the top right of the screen.	Searchable dropdown list, only one selection is possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.
Lead DFO Maritimes Region branch	Given that MarET is a Maritimes Region tool, it is assumed that all committees or working groups will involve Maritimes Region staff, and that the work of these staff will be led by either one branch in regional headquarters, or one area office. If Maritimes Region’s participation in the committee or working group is led or coordinated by staff in regional headquarters (as opposed to staff in area offices), please select the relevant branch.	Dropdown list, only one selection is possible.

Field name	Description	Instructions
	If Maritimes Region participation is led by an Area Office, see next field. If a branch's name has changed or is missing, please indicate this using the "Feedback / Bugs" feature at the top right of the screen. Branch names are followed by the region name and the national sector name in parentheses.	
Division within the specified lead branch	This field appears if a "Lead DFO Maritimes branch" is selected. Please select the specific division within the lead Maritimes branch that is the lead on this committee or working group, or coordinates for DFO Maritimes Region. If a division's name has changed or is missing, please indicate this using the "Feedback / Bugs" feature at the top right of the screen. Division names are followed by "Maritimes" in parentheses.	Dropdown list, only one selection is possible.
Lead Maritimes Region Area Office	Please select the area office that leads for DFO Maritimes Region (if led out of regional headquarters, see above fields, "Lead DFO Maritimes branch", and subsequently "Division within the specified lead branch").	Dropdown list, only one selection is possible.
Program within the specified lead area office	Please select the specific program within the above "Lead Maritimes Region Area Office" that is the lead on this committee or working group, or coordinates for DFO Maritimes Region. If a program's name has changed, please indicate this using the Feedback / Bugs feature at the top right of the screen.	Dropdown list, only one selection is possible.
Other participating DFO Maritimes Region branches	Please indicate all other DFO Maritimes Region branches that participate in or contribute to the group. If a branch's name has changed or is missing, please indicate this using the "Feedback / Bugs" feature at the top right of the screen.	Multiple selections are possible by clicking while holding down the Ctrl key.
Other participating DFO Maritimes Region area offices	Please indicate all other DFO Maritimes Region area offices that participate in or contribute to the group.	Multiple selections are possible by clicking while holding down the Ctrl key.
Other participating DFO regions	Please indicate all other DFO regions that participate in or contribute to the group.	Multiple selections are possible by clicking while holding down the Ctrl key.

Field name	Description	Instructions
Participating National Headquarters sectors	This is only visible if National is selected in the “Other participating DFO regions” field. Please indicate all national headquarters-based DFO sectors that participate in or contribute to the group. If a sector’s name has changed or is missing, please indicate this using the “Feedback / Bugs” feature at the top right of the screen.	Multiple selections are possible by clicking while holding down the Ctrl key.
Highest level DFO participant	Please indicate the highest-ranking DFO official who regularly attends meetings.	Dropdown list, only one selection is possible.
Does DFO chair/co-chair	Please indicate whether DFO holds a chair or co-chair role for the committee or working group.	Dropdown list with yes and no options.
External Chair	Please indicate who the external chair is for the committee or working group (if relevant). If the relevant contact is not listed, please add them to MarET via the Contacts page.	The list is searchable and multiple selections are possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.
Other external Contact(s)	Please list other external contacts (besides the external chair, if relevant) who regularly attend meetings. If a relevant contact is not listed, please add them to MarET via the Contacts page.	The list is searchable and multiple selections are possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.
External organization(s)	Please list external organizations that are typically represented at meetings. If the relevant organization is not listed, please add it to MarET via the Organizations page.	The list is searchable and multiple selections are possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.
DFO Maritimes Region liaison	Please indicate the main coordinator or lead for this committee or working group for Maritimes Region. This is the person who staff can reach out to if they would like to learn more. The list contains names of people who have DM Apps accounts. If the liaison(s) do not have DM Apps accounts, they will need to create one to be on the list (see earlier section “Signing onto DM Apps”).	The list is searchable and multiple selections are possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.

Field name	Description	Instructions
Other DFO Maritimes Region participants/contributors	Please indicate all DFO Maritimes Region staff who regularly attend meetings, if known. The list contains names of people who have DM Apps accounts. If the participant(s) do not have DM Apps accounts, they will need to create one to be on the list (see earlier section "Signing onto DM Apps").	The list is searchable and multiple selections are possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.
Indigenous community/organization participation?	Please check the box if representatives of Indigenous communities or organizations regularly attend meetings.	If you click the box, it will turn blue and a checkmark will appear. This signifies a "Yes".
Local/municipal government participation?	Please check the box if local or municipal government officials regularly attend meetings.	If you click the box, it will turn blue and a checkmark will appear. This signifies a "Yes".
Provincial government participation?	Please check the box if provincial government officials regularly attend meetings.	If you click the box, it will turn blue and a checkmark will appear. This signifies a "Yes".
Other federal department/agency participation?	Please check the box if officials from other federal government departments or agencies regularly attend meetings.	If you click the box, it will turn blue and a checkmark will appear. This signifies a "Yes".
Meeting frequency	Please indicate how often the group meets. If the appropriate option is not listed, please indicate meeting frequency in the "Comments" section below.	Dropdown list, only one selection is possible.
Are there terms of reference?	Please check the box if the committee or working group has a terms of reference.	If you click the box, it will turn blue and a checkmark will appear. This signifies a "Yes".
Location of terms of reference	This field only appears if it is indicated that the committee or working group has a terms of reference. Please indicate where the terms of reference can be found, or who can be contacted to request a copy of the terms of reference.	Text field.
Role of committee / working group	Please indicate what the purpose is of this committee or working group.	Text field.
Comments	Please include any additional comments or considerations to flag.	Text field.

Once you have finished filling in the necessary data fields, click the yellow “Add” button at the bottom of the page. If you do not wish to save your work, either click the grey “Back” button, or navigate away from the page.

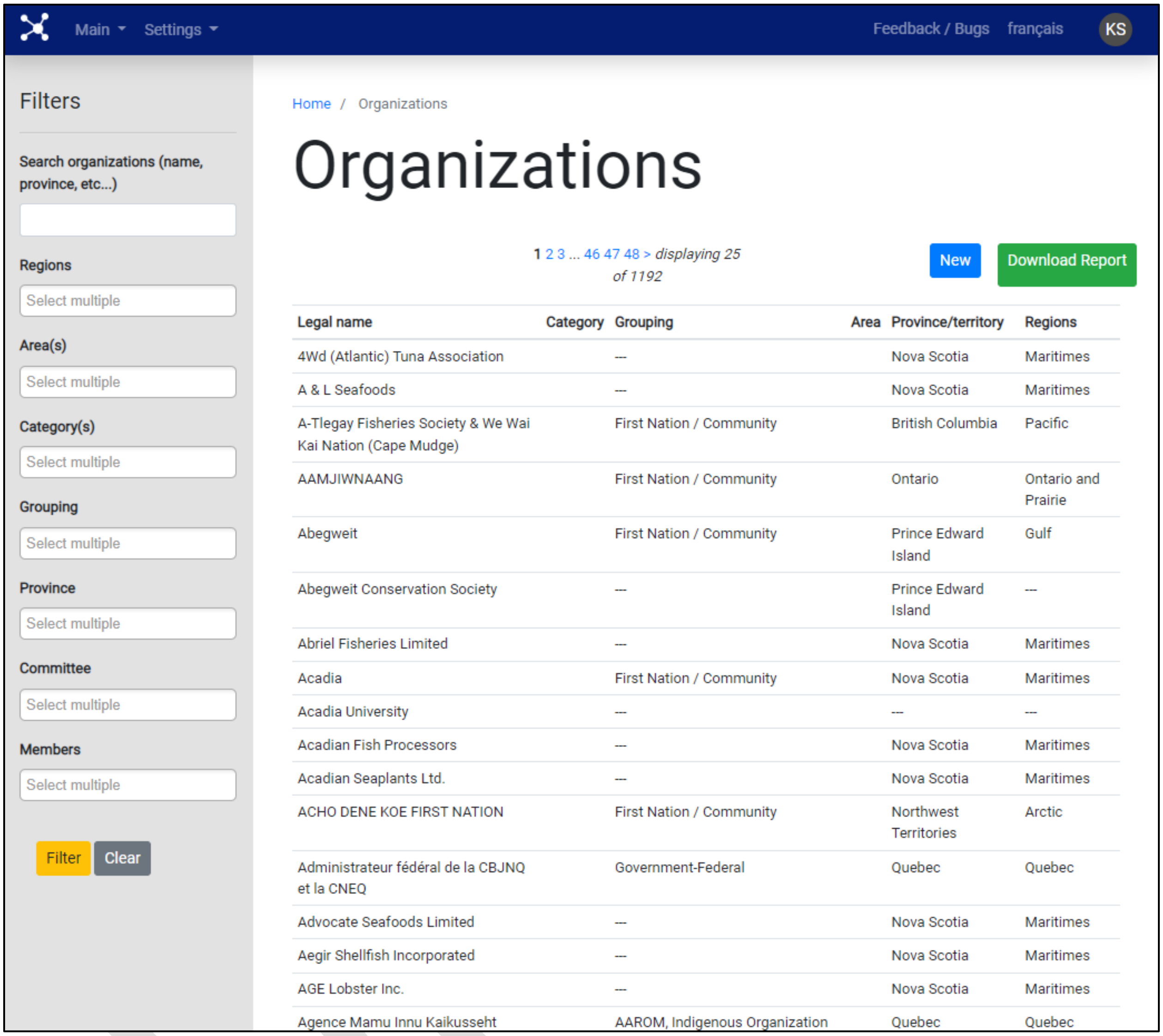
Organizations

This component of MarET keeps a record of external organizations with which DFO interacts. In this context, “external” refers to any organization outside of DFO.

There is already a considerable amount of information available here about many external organizations, so when starting out with MarET, it is recommended that before creating a new organization you do a quick search first to make sure that it does not already exist in the system. Some of this information was gathered over the course of the Stakeholder and Partner Engagement Project, but most comes from a DM Apps master list. iHub uses the same master list of organizations, but only pulls a subset of organizations for its tool. To avoid a situation where a MarET user may accidentally modify an organization that falls primarily within the realm of iHub, certain organizations are locked for editing through MarET. Note – for some reason, this is not the case for all Indigenous communities. This is being looked into.

Organizations main page

The Organizations main page is accessible by either selecting the “Organizations” button on the MarET home screen, or by clicking the “Main” button on the header, then “Organizations”. That will bring you to this page:



The page shows all organizations recorded in DM Apps to date. You can adjust which organizations you are able to see using the filter and search items on the left of the page. After adding a new filter criterion, the list of organizations will automatically be adjusted accordingly. For filters that allow for multiple selections (indicated with the grey text "Select multiple"), you can start typing in the text box to search for the item you are looking for. Once you see it, either click on it or press Enter with it highlighted in blue and wait for the list of organizations to adjust. You can then start typing to search the next item you would like to select.

If you would like to get rid of the filters and searches you have applied, click the "Clear" button at the bottom of the column.

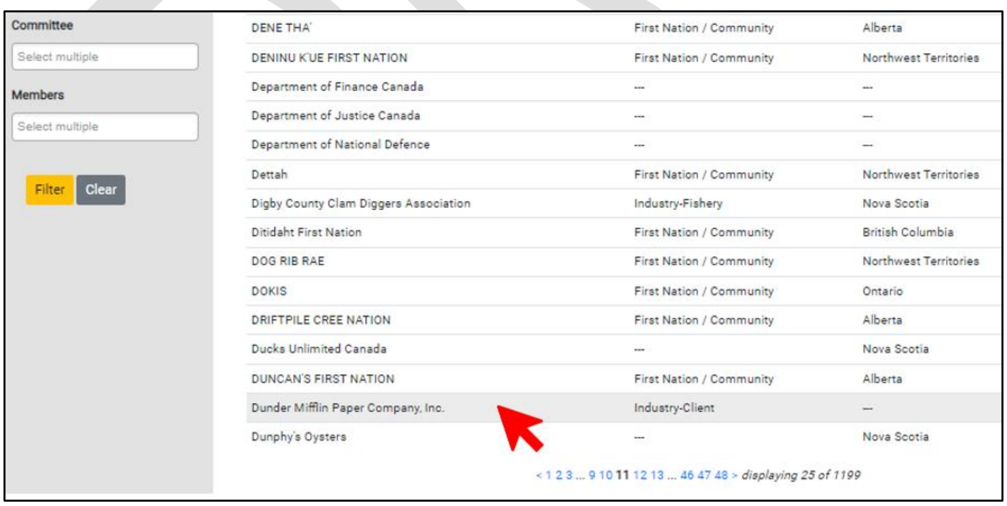
Download a report

At any point, it is possible to generate a report of all information currently visible on the page by clicking the green Download Report button.

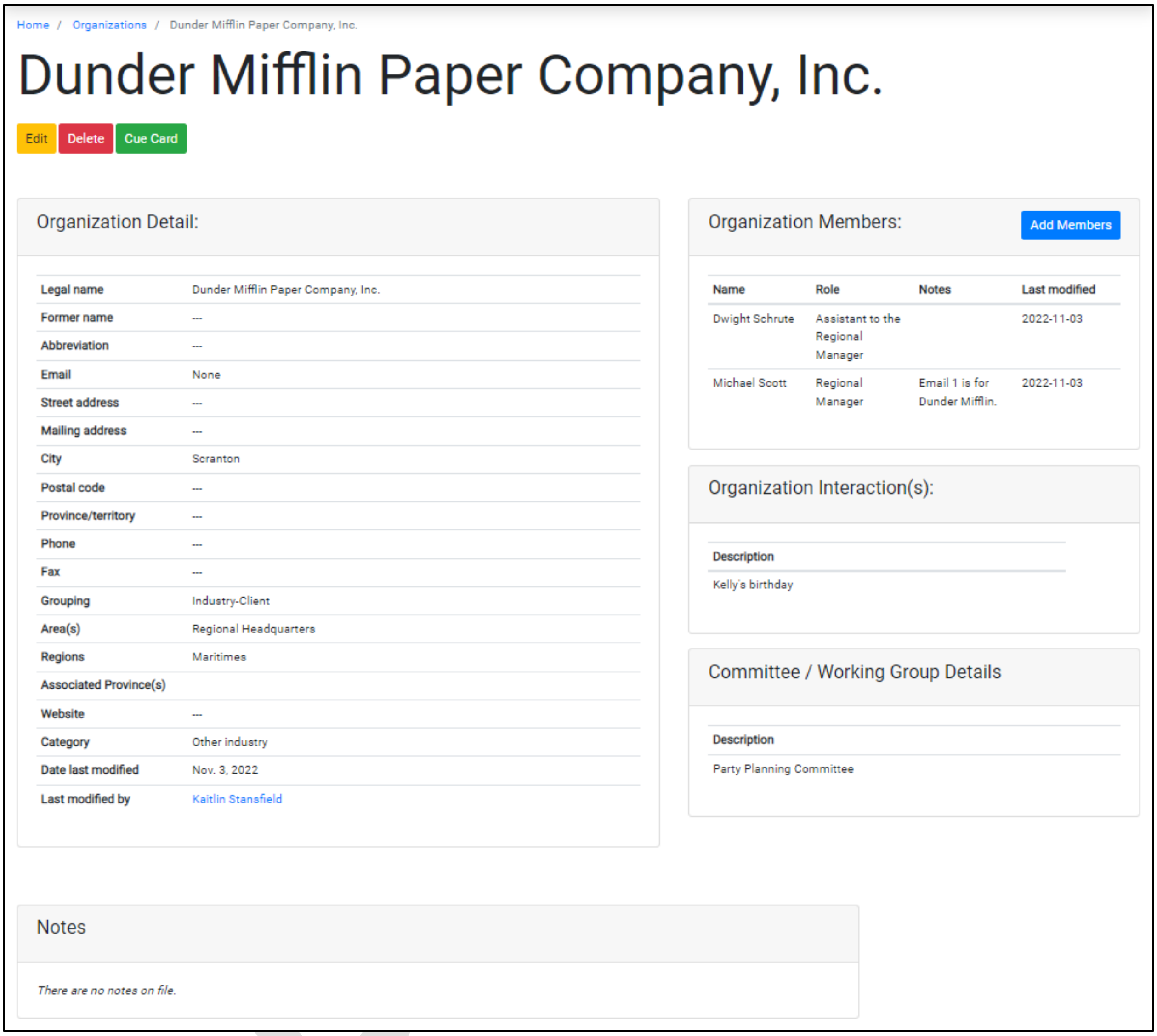
Once you click that button, an Excel workbook will be downloaded containing all the information that is visible on the screen given the filters and searches that have been applied. Note – at this point, the report will only include items on that page. For organizations, this means that a maximum of 25 items will be included in this report. To include more items, you will need to download a report for each page, then amalgamate into one Excel workbook. Work is underway to make it so that the report will include items from all pages.

Organization information

You can click on an organization to see more information.



If you select an organization from the Organizations main page (as shown above), or if you select it from the page for a relevant external contact, external organization, or committee or working group, you will see a page similar to the following:



This page consists of five main sections: "Organization Details", "Organization Members", "Organization Interaction(s)", "Committee / Working Group Details", and "Notes". The members, interactions, and committee / working group details can be clicked to see more information.

The "Committee / Working Group Details" can also be changed in two ways. First, by editing the Organization (see later section, "Editing an existing Organization") and making adjustments to the "Committees/Working Groups" data field. Second, by editing a committee or working group (see earlier section, "Editing an existing committee / working group") and making adjustments to the "External Organization(s)" data field.

The “Organization Interactions” can be changed either by clicking on individual interactions and editing them (see previous section, “Editing an existing interaction”), or by adding a new interaction on the interactions main page (see previous section, “Creating an interaction”).

Notes can be added to the organization’s information page by editing the organization (see later section, “Editing an existing Organization”.

Changing the “Organization Members” information is covered in a subsection below.

The main “Organization Details” box contains information that was entered when the organization was created or last edited.

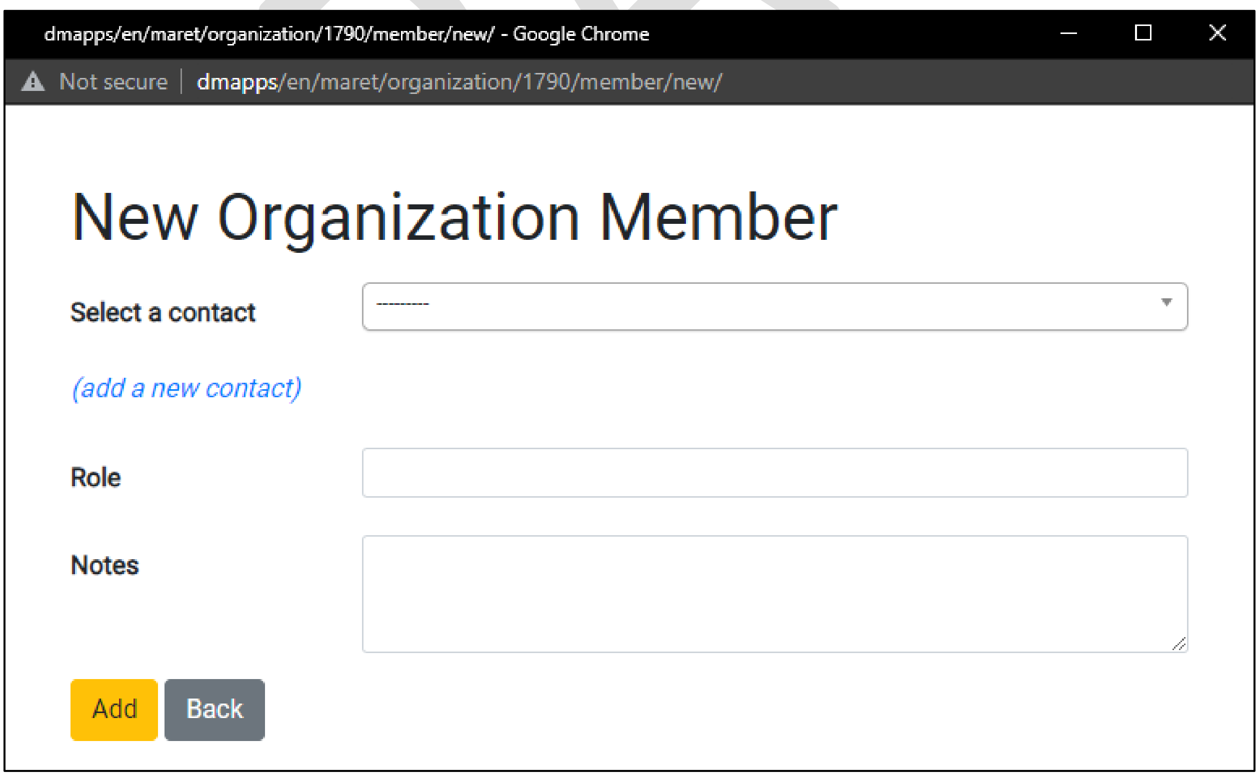
Some organization information pages will have the following banner across the top:

This banner indicates that the organization can only be edited through iHub (another tool on DM Apps that tracks consultation and collaboration with Indigenous organizations and communities). If you believe that an edit is required and you are not also an iHub user, it is suggested that you reach out to the last person to have modified that organization.

Organization members

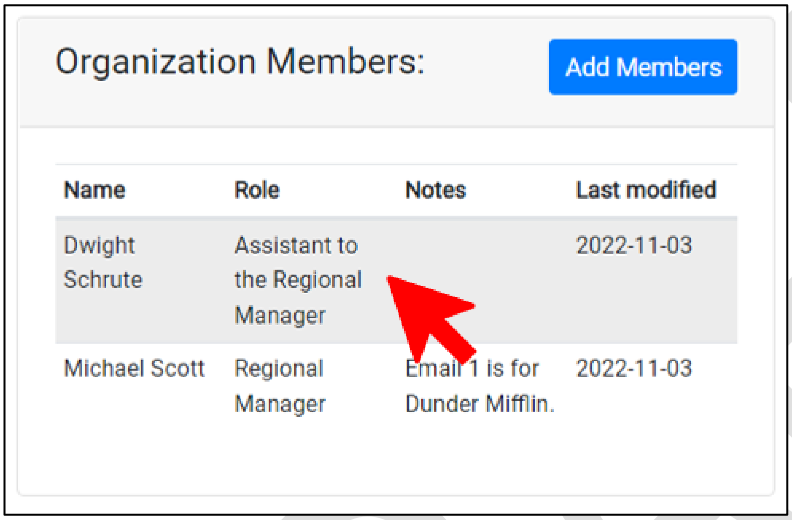
Once a contact is entered into MarET (see later section, “Creating a new contact”), they can be assigned as an organization member in two ways. First, by editing a contact (see later section, “Editing an existing contact”) and making adjustments to the “Organization Membership” data field as needed. Note that if you choose this route, the contact will still need to be assigned a Role, which must be done by editing their information on the organization’s information page (shown in the following paragraphs). The second way is to click the click the blue “Add Members” button on the organization’s information page:

That will bring up the following window:

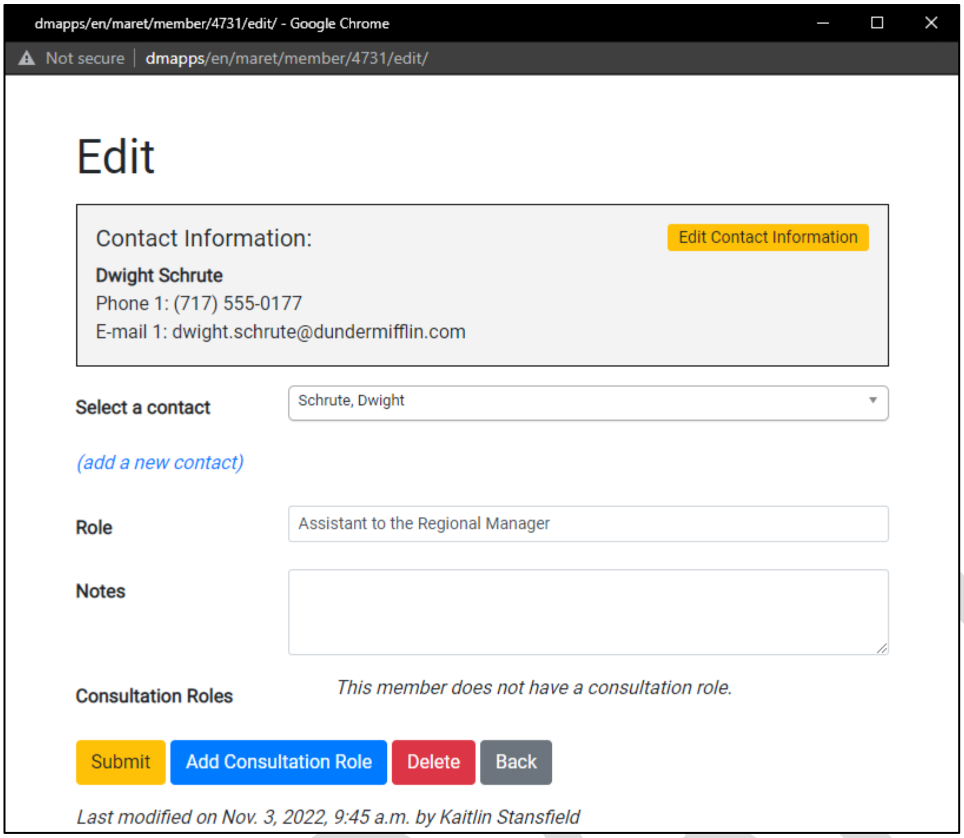


You can then select a contact (this is a searchable drop-down list – to search, simply start typing then either click the correct contact or press Enter while their name is highlighted in blue). Then enter the contact's role in the organization, and add any notes that may be necessary (for example, to specify which of the contact's multiple phone numbers is used for this role, if the contact is a member of multiple organizations).

You can also edit a contact's membership information by clicking on them:



That will bring up the following window:



Here you are able to see and edit the information about this organization member. Note that the "Consultation Role" function is primarily geared towards iHub use, and will likely not be relevant for most MarET uses. If you plan to edit the information on this page, it is recommended that you first reach out to the last person to have made edits, shown at the bottom of the window.

Editing an existing organization

You can edit an existing organization at any time by clicking the yellow "Edit" button on an organization's information page (as noted above, this button will not appear if the organization is locked for editing in MarET):

This will allow for changes to be made to any of the editable data fields (more information on filling those data fields is provided below under “Creating a new organization”). Once you are finished making edits, click “Save” at the bottom of the page. This will implement the edits. The “Date last modified” and the “Last modified by” fields will be updated automatically to reflect the edits.

If the organization was recently edited by someone else, it is recommended that you check in with that person before making an edit.

Deleting an existing organization

It is recommended that an organization not be deleted if it is no longer active. If it is renamed, its name can be changed and the old name can be entered into the “Former name” data field. If the organization ceases to exist, its name can be edited to include the word “Inactive”. Even if an organization no longer exists, it could still be beneficial to colleagues to be able to see its past information and interactions. However, if it is necessary to delete an existing organization (for example, if it is a duplication), this can be done at any time by clicking the red “Delete” button on an organization’s information page (as noted above, this button will not appear if the organization is locked for editing in MarET):

This will open up another page, as shown below, asking if you are sure that you want to delete the organization. This is to prevent an accidental deletion.

The page will list all the items (contacts/organization members, consultation roles (an iHub function), entries (another iHub function), committees, and interactions) linked to this organization. As long as the organization is linked to other items, it cannot be deleted.

In order to delete the organization, you will have to remove all of these linkages. If you are deleting the organization because it is a duplication, it is suggested that you replace all of these linkages for the other version of the organization.

Removing contact linkages: to remove these linkages, either click on organization members on the organization's information page to open their information window (see previous subsection, "Organization members") and click the red "Delete" button, or navigate to the contact's information page, click "Edit", (see later section, "Editing an existing contact"), and modify the "Organization Membership" data field as needed.

Removing committee linkages: to remove these linkages, either adjust the "External Organization(s)" data field for that committee or working group (see earlier section, "Editing an existing committee / working group"), or adjust the "Committees/Working Groups" data field for the organization (see previous section, "Editing an existing organization").

Removing interaction linkages: to remove these linkages, you will need to adjust the "External Organization(s)" data field for each linked interaction (see earlier section, "Editing an existing interaction").

If the organization has no linkages, like the below example, and you are sure that you would like to delete it, click "Delete".

Before deleting an organization, it is recommended that you check in with the last person to have edited that organization. Similarly, if the organization is linked to committees or interactions, it is recommended that you check in with the liaison listed for those committees or interactions.

Cue cards

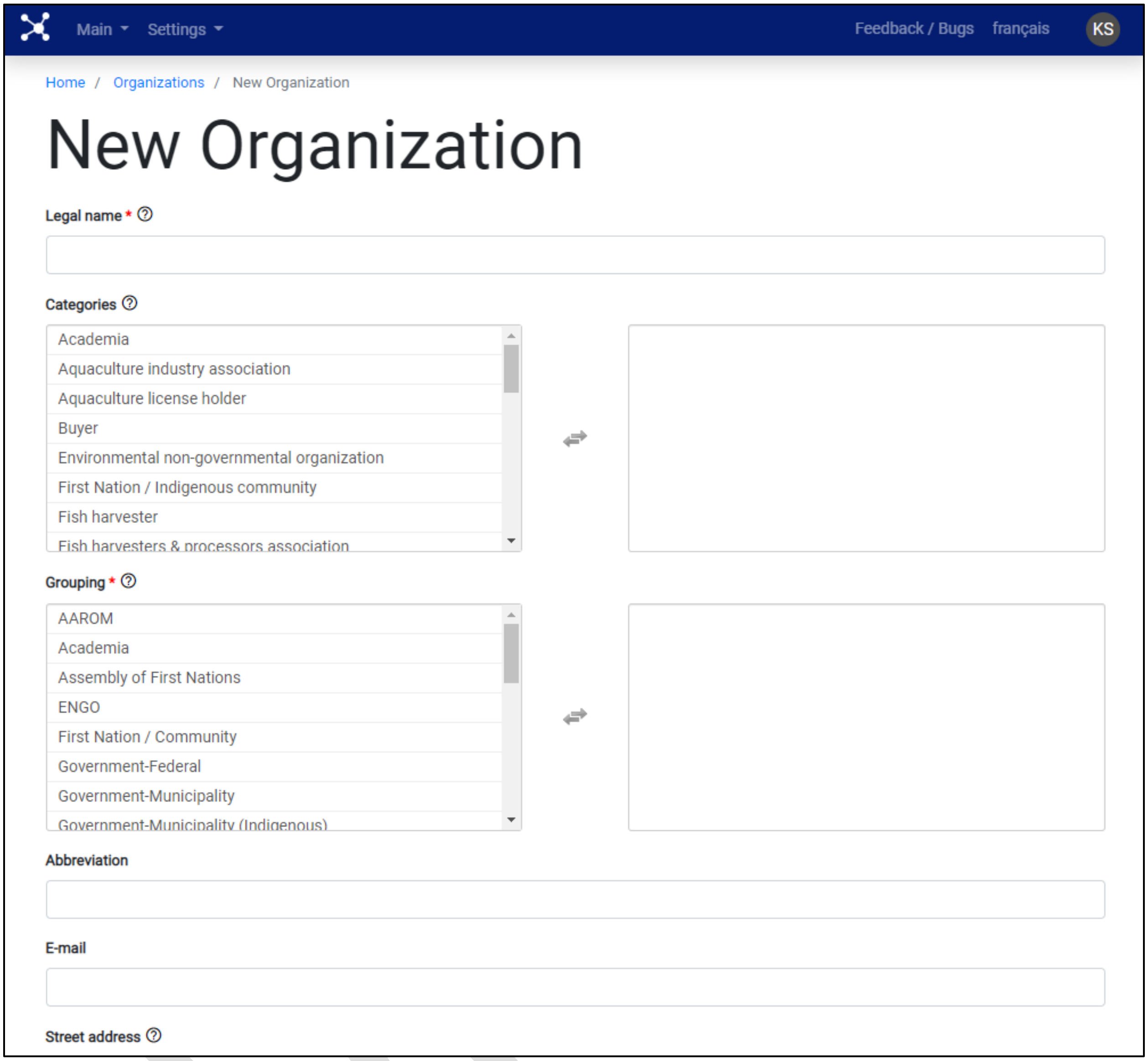
On an organization's information page, you will see a green "Cue Card" button:

If you click on this button, you will be brought to a page that lists all information relating to the organization. This is meant to act as a reference document that can easily be printed and studied before an interaction with that organization. This function was brought over from iHub, and further discussion needs to take place to determine: 1) whether MarET interactions can be added to cue cards without negatively affecting the functionality for iHub users, and 2) what information from both tools should be visible to users.

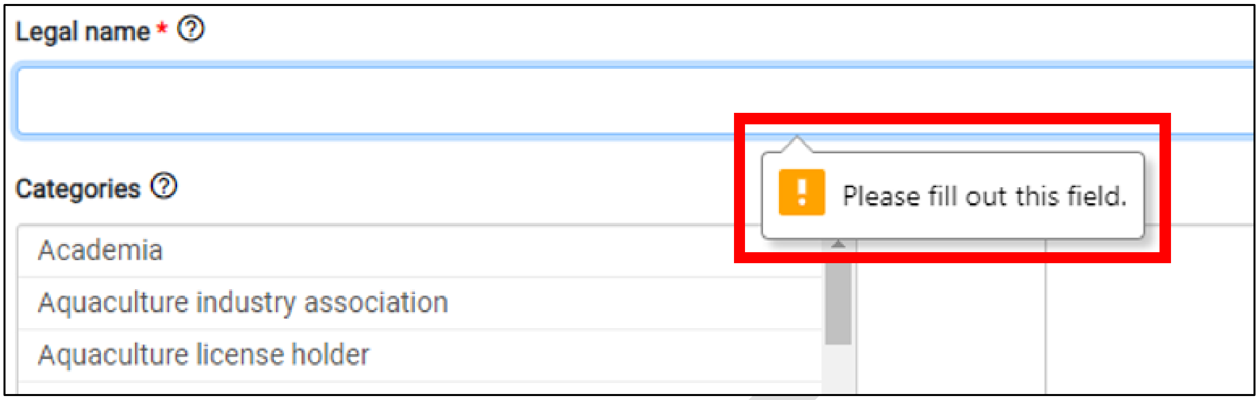
Creating a new organization

To create a new organization, click the "New" button from the Organizations main page.

This will open the following page:

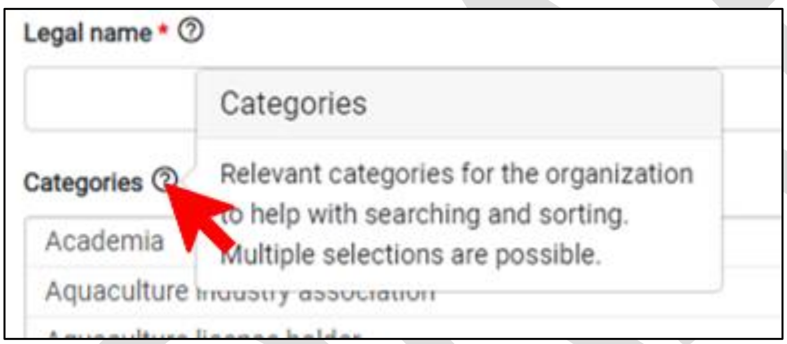


The red asterisks on this page indicate required fields. If you click "Add" at the bottom of the page before filling out the required fields, you will receive the following error message:



There are very few required fields. However, it is recommended that as many fields be filled out as possible for the purposes of information sharing, and to make it easier to find the organization through filtering and sorting on the organizations main page.

Many data fields on this page have associated help text, indicated with the (?) symbol. If you hover your cursor over the question mark, instructions and other details will come up. For example:



The following table provides an overview of organization data fields, most of which is included in the existing help text:

Field name	Description	Instructions
Legal name	Please indicate the full legal name for the organization.	Text field. Please avoid the use of acronyms.
Categories	Please select all relevant categories for the organization to help with searching and sorting. If a category should be changed or added, please indicate this using the “Feedback / Bugs” feature at the top right of the screen.	Multiple selections are possible. To select a category, simply click it and it will be moved into the right-hand box to indicate that it applies. If you would like to remove a category, click it again and it will move into the left-hand box.

Field name	Description	Instructions
Grouping	This data field is very similar to the above, but this list is for iHub. Discussions are ongoing as to how this data field might be either integrated with the categories field, or hidden on MarET. In the meantime, apologies for the reporting duplication.	Multiple selections are possible. To select a grouping, simply click it and it will be moved into the right-hand box to indicate that it applies. If you would like to remove a grouping, click it again and it will move into the left-hand box.
Abbreviation	An acronym that is typically used to refer to this organization.	Text field.
E-mail	A generic e-mail address for the organization.	Text field.
Street address	The street address for the headquarters of this organization.	Text field.
Mailing address	The organization's mailing address, if different from the street address (e.g. if there is a P.O. box).	Text field.
City	The city in which the organization's headquarters are located (linked to the street/mailing address).	Text field.
Postal code	The postal code for the organization's headquarters.	Text field.
Province/territory	The province or territory where the organization is headquartered (different from the "Associated Province(s)" field below, more on that to follow).	Dropdown list, only one selection is possible.
Phone	A general inquiries phone line for the organization.	Text field.
Fax	A fax number for the organization.	Text field.
Notes	Any relevant notes or comments about the organization (e.g. office hours, driving instructions, etc.).	Text field.
Area(s)	Please select all Maritimes Region areas that are relevant to/interact with the organization.	Multiple selections are possible. To select a grouping, simply click it and it will be moved into the right-hand box to indicate that it applies. If you would like to remove a grouping, click it again and it will move into the left-hand box.
Regions	Please select all DFO regions in which the organization operates.	Multiple selections are possible. To select a grouping, simply click it and

Field name	Description	Instructions
		it will be moved into the right-hand box to indicate that it applies. If you would like to remove a grouping, click it again and it will move into the left-hand box.
Associated Province(s)	Please select all provinces in which the organization operates.	Multiple selections are possible. To select a grouping, simply click it and it will be moved into the right-hand box to indicate that it applies. If you would like to remove a grouping, click it again and it will move into the left-hand box.
Committees/Working Groups	Please indicate all committees and working groups in which the organization regularly participates. If the relevant committee or working group is not listed, please add it to MarET via the committees page.	The list is searchable and multiple selections are possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.
Former name	If the organization used to be known by a different name, please enter that name here.	Text field. If using an acronym, please also write out the name in full.
Website	A link to the organization's website.	Text field.
Audio file	This function is to help with pronunciation – you can record the correct pronunciation of the organization's name and upload it for reference.	Click the "Choose File" button, select the audio file in file explorer, and click "Open".

Once you have finished filling the necessary data fields, click the yellow "Add" button at the bottom of the page. If you do not wish to save your work, either click the grey "Back" button, or navigate away from the page.

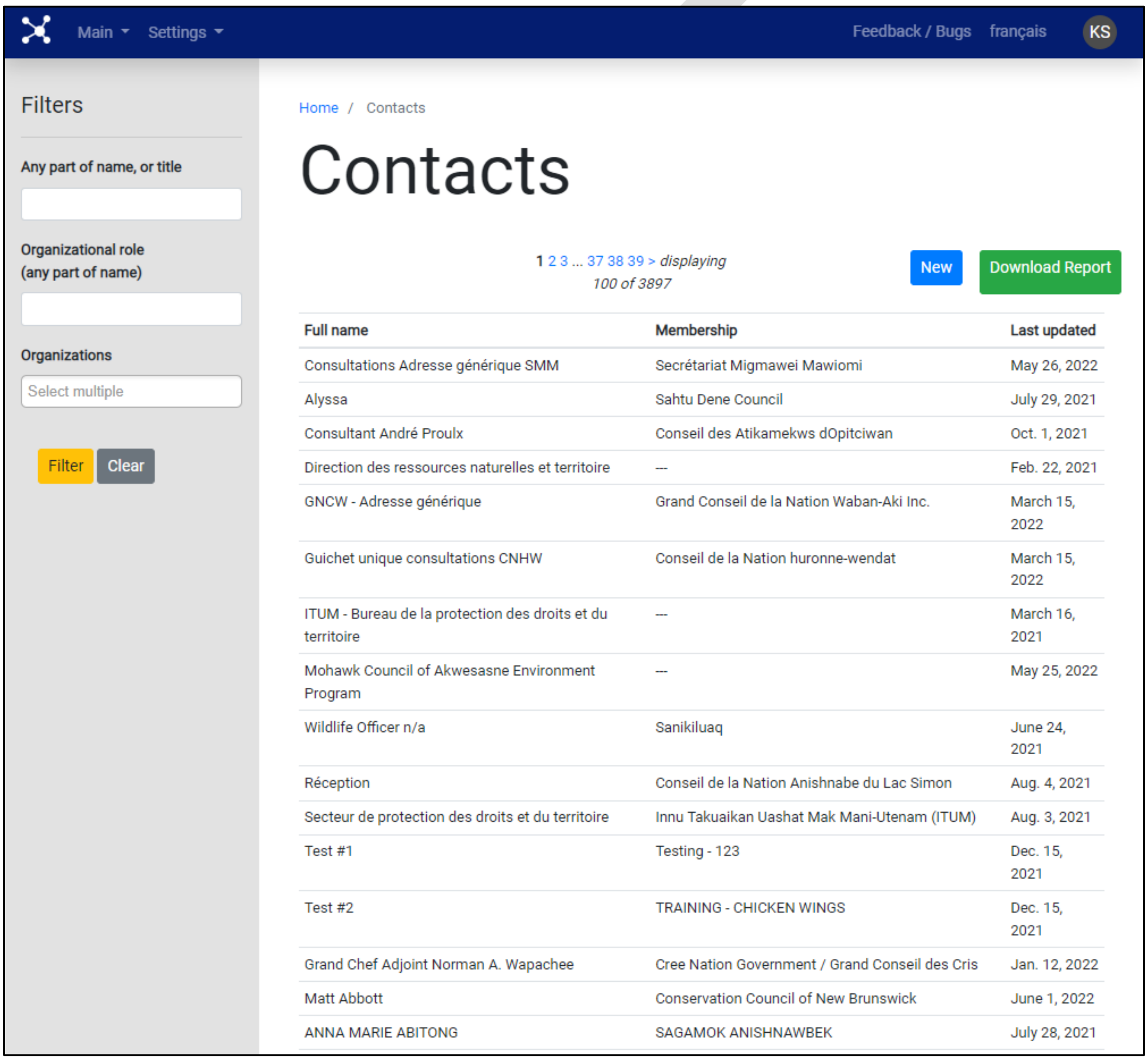
Contacts

This component of MarET keeps a record of external contacts with whom DFO interacts. In this context, "external" refers to any person who is not a DFO employee.

There is already a considerable amount of information available here about many external contacts, so when starting out with MarET, it is recommended that before creating a new contact you do a quick search first to make sure that it does not already exist in the system. Some of this information was gathered over the course of the Stakeholder and Partner Engagement Project, but most comes from a DM Apps master list. iHub uses the same master list of contacts, but only pulls a subset of contacts for the tool. To avoid a situation where a MarET user may accidentally modify a contact who falls primarily within the realm of iHub, certain contacts are locked for editing through MarET. Note – for some reason, this is not the case for all representatives of Indigenous communities. This is being looked into.

Contacts main page

The Contacts main page is accessible by either selecting the "Contacts" button on the MarET home screen, or by clicking the "Main" button on the header, then "Contacts". That will bring you to this page:

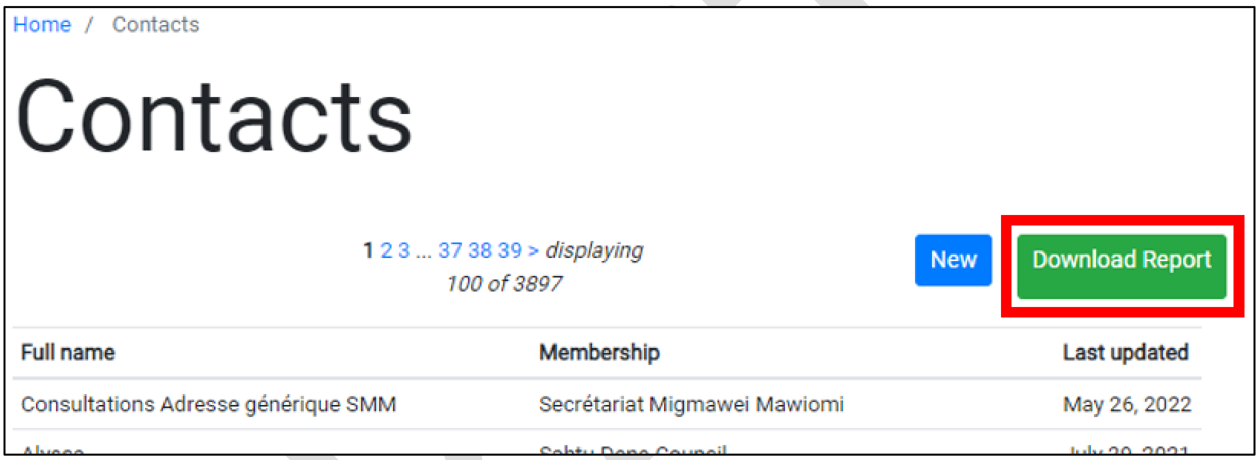


The page shows all contacts recorded in DM Apps to date. You can adjust which contacts you are able to see using the filter and search items on the left of the page. After adding a new filter criterion, the list of contacts will automatically be adjusted accordingly. For filters that allow for multiple selections (indicated with the grey text “Select multiple”), you can start typing in the text box to search for the item you are looking for. Once you see it, click on it or hit Enter with it highlighted in blue, wait for the list of contacts to adjust, then you can start typing to search the next item you would like to select.

If you’d like to get rid of the filters and searches you’ve applied, click the “Clear” button at the bottom of the column.

Download a report

At any point, it is possible to generate a report of whichever information is currently visible on the page by clicking the green “Download Report” button.

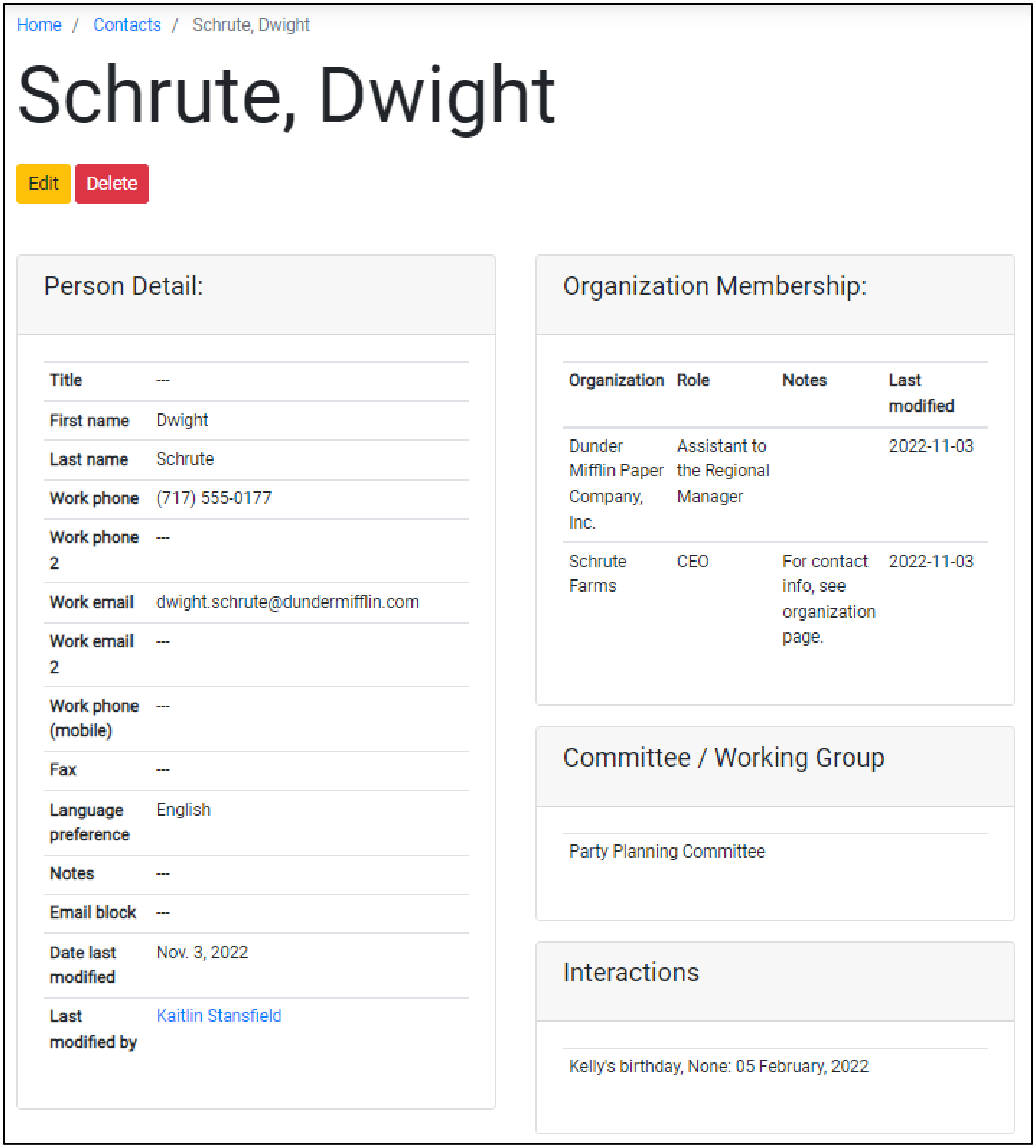


Once you click that button, an Excel workbook will be downloaded containing all the information that is visible on the screen given the filters and searches that have been applied. Note – at this point, the report will only include items on that page. For contacts, this means that a maximum of 100 items will be included in this report. To include more items, you will need to download a report for each page, then amalgamate into one Excel workbook. Work is underway to make it so that the report will include items from all pages.

Contact information

You can click on a contact to see more information:

If you select a contact from the Contacts main page (as shown above), or if you select them from the page for a relevant interaction or committee or working group, you will see a page similar to the following:



This page consists of four main sections: "Person Details", "Organization Membership", "Committee / Working Group", and "Interactions". The organization memberships, committees / working groups, and interactions can be clicked to see more information.

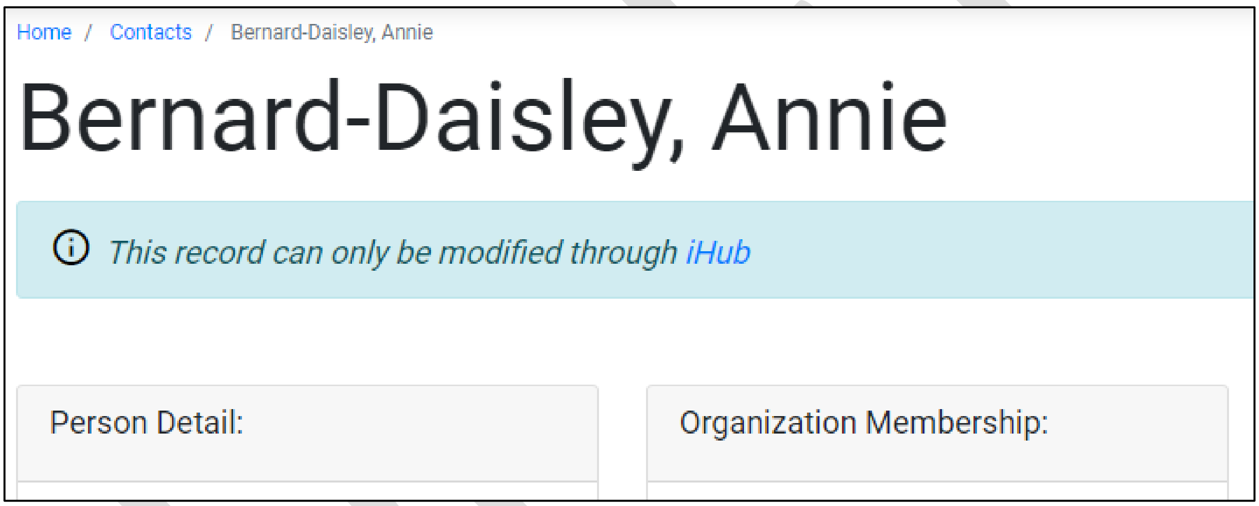
Details about how to change a contact's "Organization Membership" can be found in an earlier section, "Organization members").

The “Committee / Working Group” details can be changed in two ways. First, by editing the contact (see later section, “Editing an existing contact”) and making adjustments to the “Committees/Working Groups” data field. Second, by editing a committee or working group (see earlier section, “Editing an existing committee / working group”) and making adjustments to either the “External Chair” or the “Other external contact(s)” data field, as needed.

The “Interactions” can be changed either by clicking on individual interactions and editing them (see previous section, “Editing an existing interaction”), or by adding a new interaction on the interactions main page (see previous section “Creating a new interaction”).

As for the main “Person Detail” box, this information is what was entered when the contact was created or last edited.

Some contact information pages will have the following banner across the top:



This banner indicates that the contact can only be edited through iHub (another tool on DM Apps that tracks consultation and collaboration with Indigenous organizations and communities). If you believe that an edit is required and you are not also an iHub user, it is suggested that you reach out to the last person to have modified that contact’s information.

Editing an existing contact

You can edit an existing contact at any time by clicking the yellow “Edit” button on a contact’s information page (as noted above, this button will not appear if the contact is locked for editing in MarET).

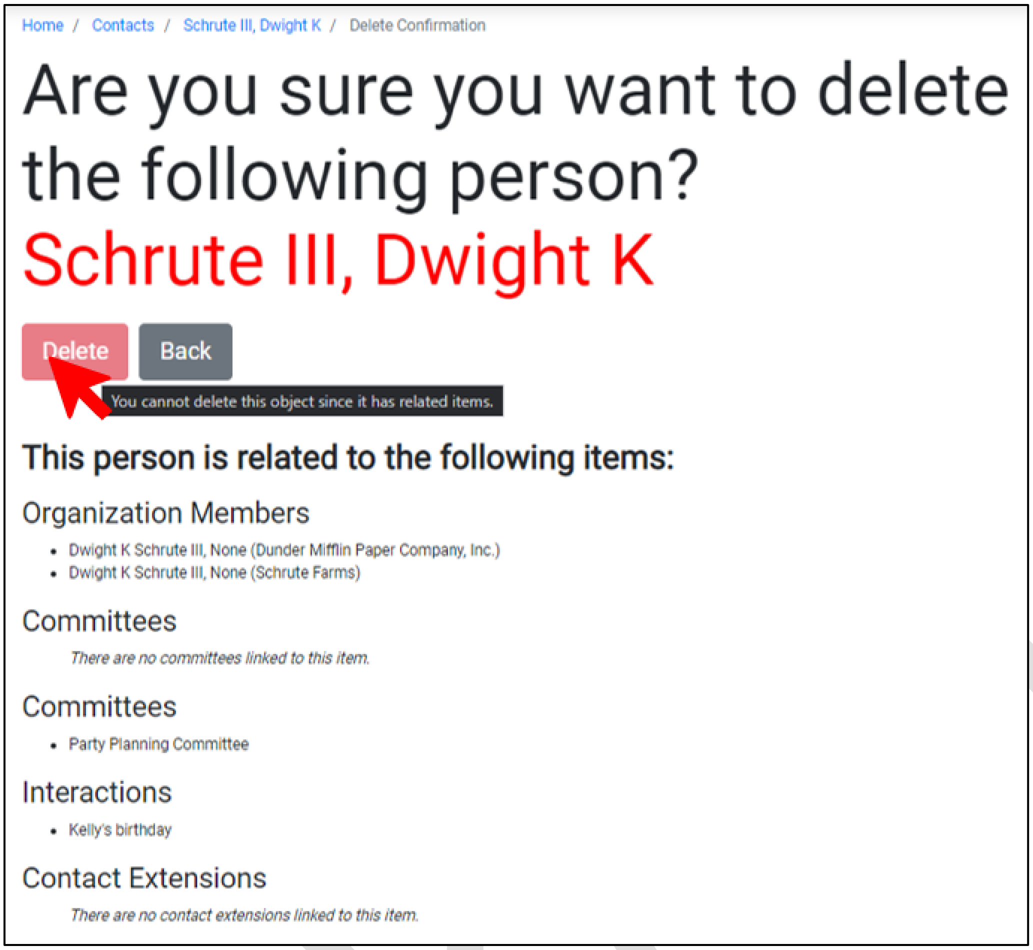
This will allow for changes to be made to any of the editable data fields (more information on filling those data fields is provided below under "Creating a new contact"). Once you are finished making edits, click "Save" at the bottom of the page. This will implement the edits. The "Date last modified" and the "Last modified by" fields will be updated automatically to reflect the edits.

If the contact was recently edited by someone else, it is recommended that you check in with that person before making an edit.

Deleting an existing contact

It is recommended that a contact not be deleted if they are no longer active. Even if a contact is no longer active or relevant, it could still be helpful to be able to see details about past engagement with them. A note could be added to the contact's "Person Details", and/or to their "Organization Membership", indicating if they are no longer a relevant contact. However, if it is necessary to delete an existing contact (for example, if the contact is duplicated), this can be done at any time by clicking the red "Delete" button on a contact's information page (as noted above, this button will not appear if the contact is locked for editing in MarET):

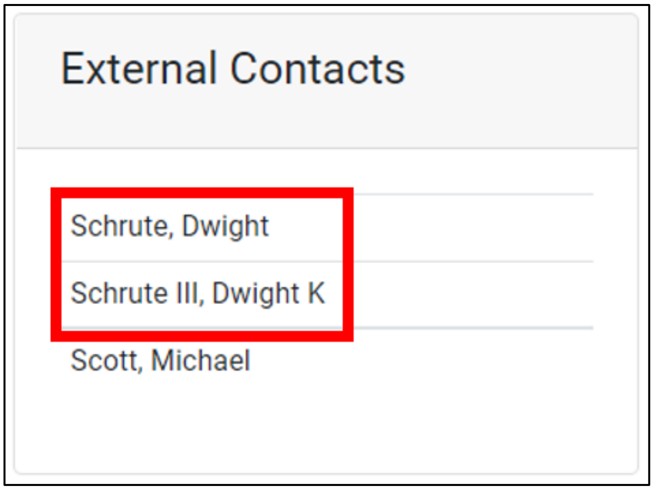
This will open up another page, as shown below, asking if you are sure that you want to delete the contact. This is to prevent an accidental deletion.



The page will list all the items (organization memberships, committees, and interactions) linked to this contact. As long as the contact is linked to other items, they cannot be deleted (see error message in the above image).

In order to delete the contact, you will have to remove all of these linkages. If you are deleting the contact because of a duplication, it is suggested that you replace all of these linkages for the other version of the contact.

In this example, Dwight K Schrute III is being deleted because there is another Dwight Schrute already in the system:



Upon review, “Dwight Schrute” has been updated more recently than “Dwight K Schrute III”, and has been linked to items more recently, so the latter will be deleted. “Dwight K Schrute III” must be removed from the following items, and replaced with “Dwight Schrute”:

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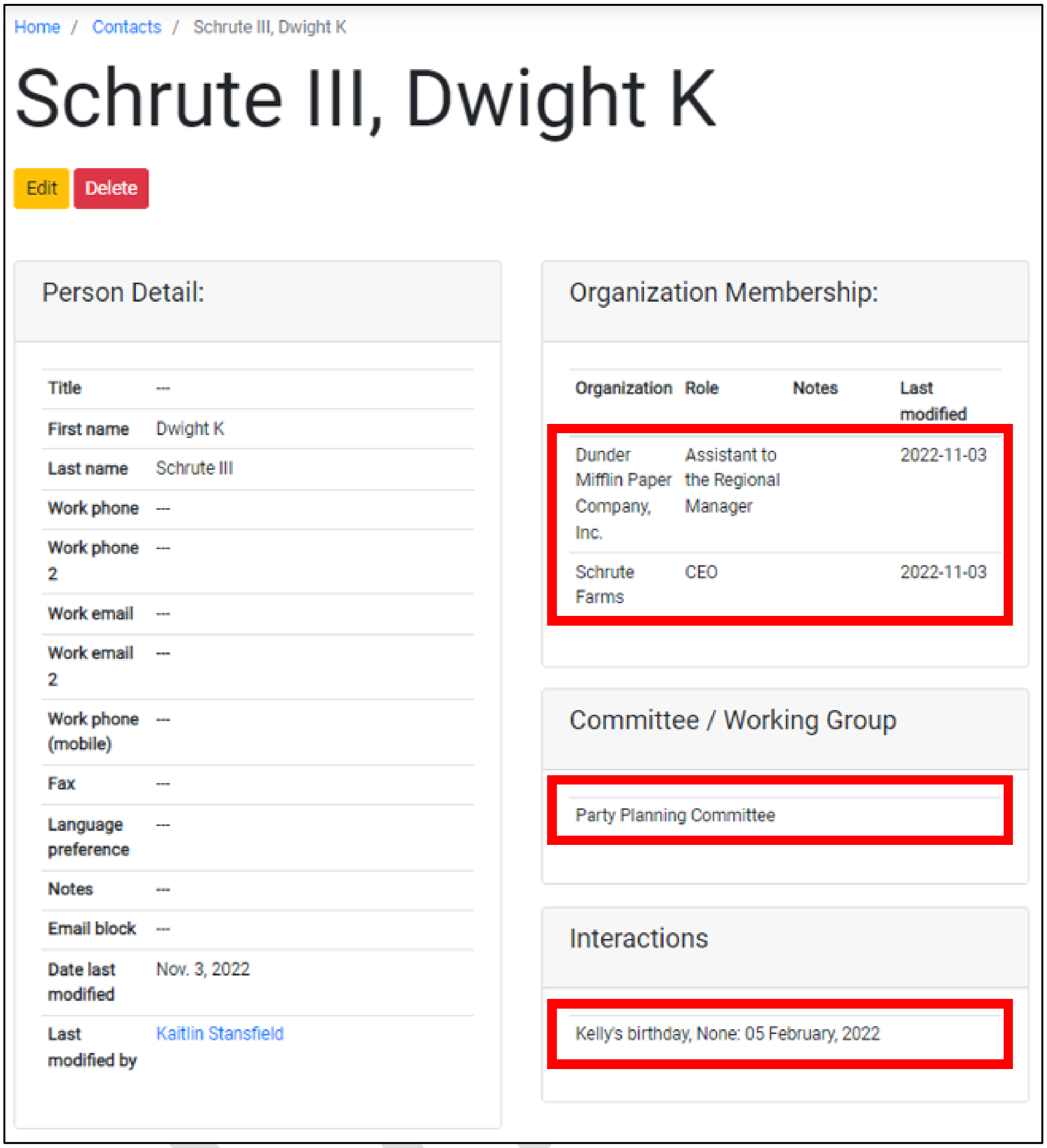
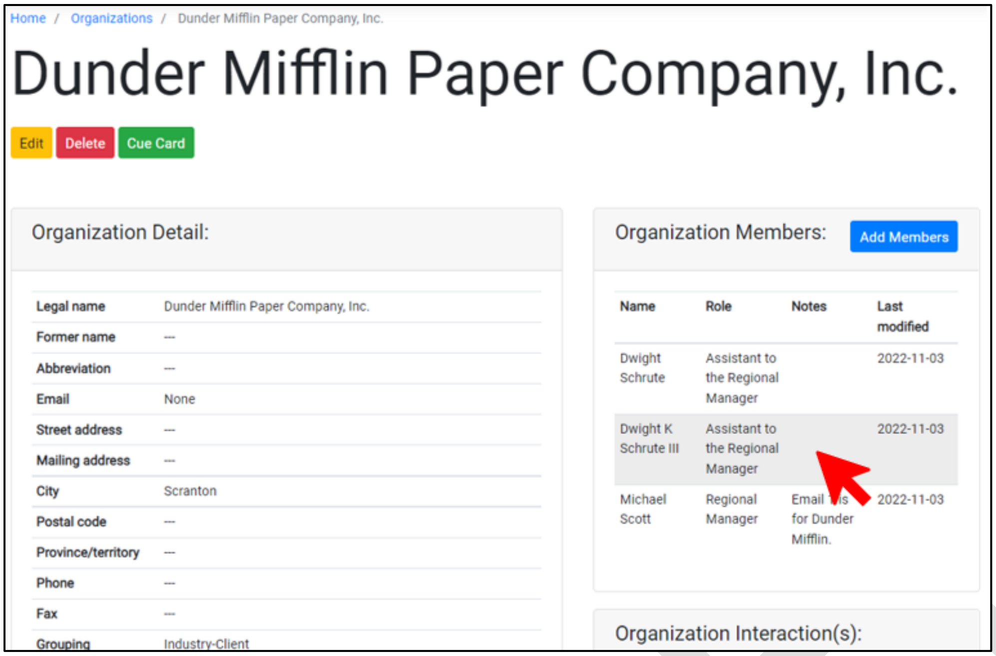
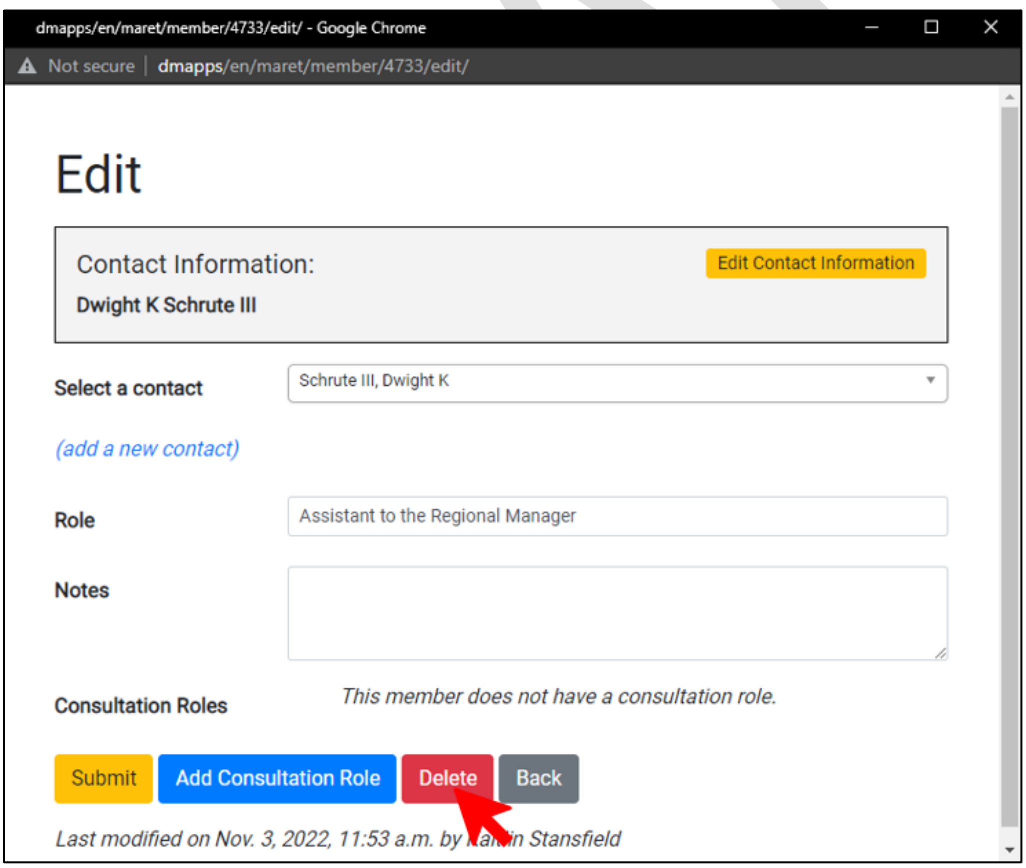


First, the organization membership will need to be removed. Navigate to the relevant organization's information page, and select the contact from the "Organization Members" box:



That will bring up the following window:



[Back to top]

As indicated above, click the red “Delete” button. Another page will open, asking if you are sure:

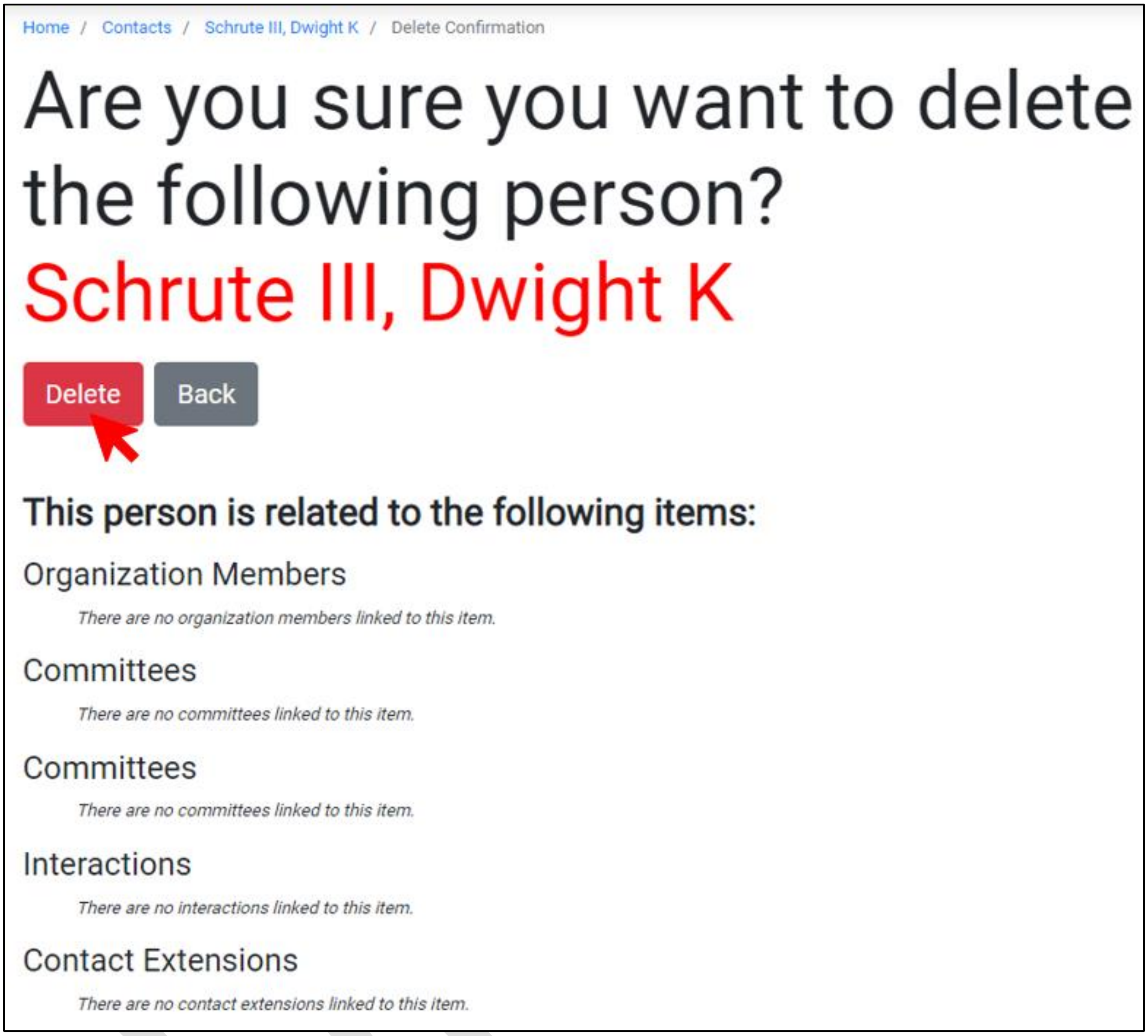
Click “Delete” if you are sure that you would like to delete the organization membership link. Note that “Consultation Roles” is a function from iHub and does not apply to MarET.

Another, perhaps faster, way to remove the organization membership is to navigate to the contact’s information page, click “Edit”, (see earlier section, “Editing an existing contact”), and modify the “Organization Membership” data field as needed.

To remove committee linkages, either navigate to the relevant committee or working group’s information page, click “Edit”, and adjust either the “External Chair” or “Other external contact(s)” data field (depending on whether or not the contact is the chair of the committee or working group; see earlier section, “Editing an existing committee / working group”), or adjust the “Committees/Working Groups” data field for the contact (see previous section, “Editing an existing contact”).

To remove interaction linkages, you will need to adjust the “External contact(s)” data field for each linked interaction (see earlier section, “Editing an existing interaction”).

If, or once, the contact has no linkages, and you are sure that you would like to delete them, click the red “Delete” button on the contact’s information page (as shown earlier), then click “Delete” once more on the subsequent page:

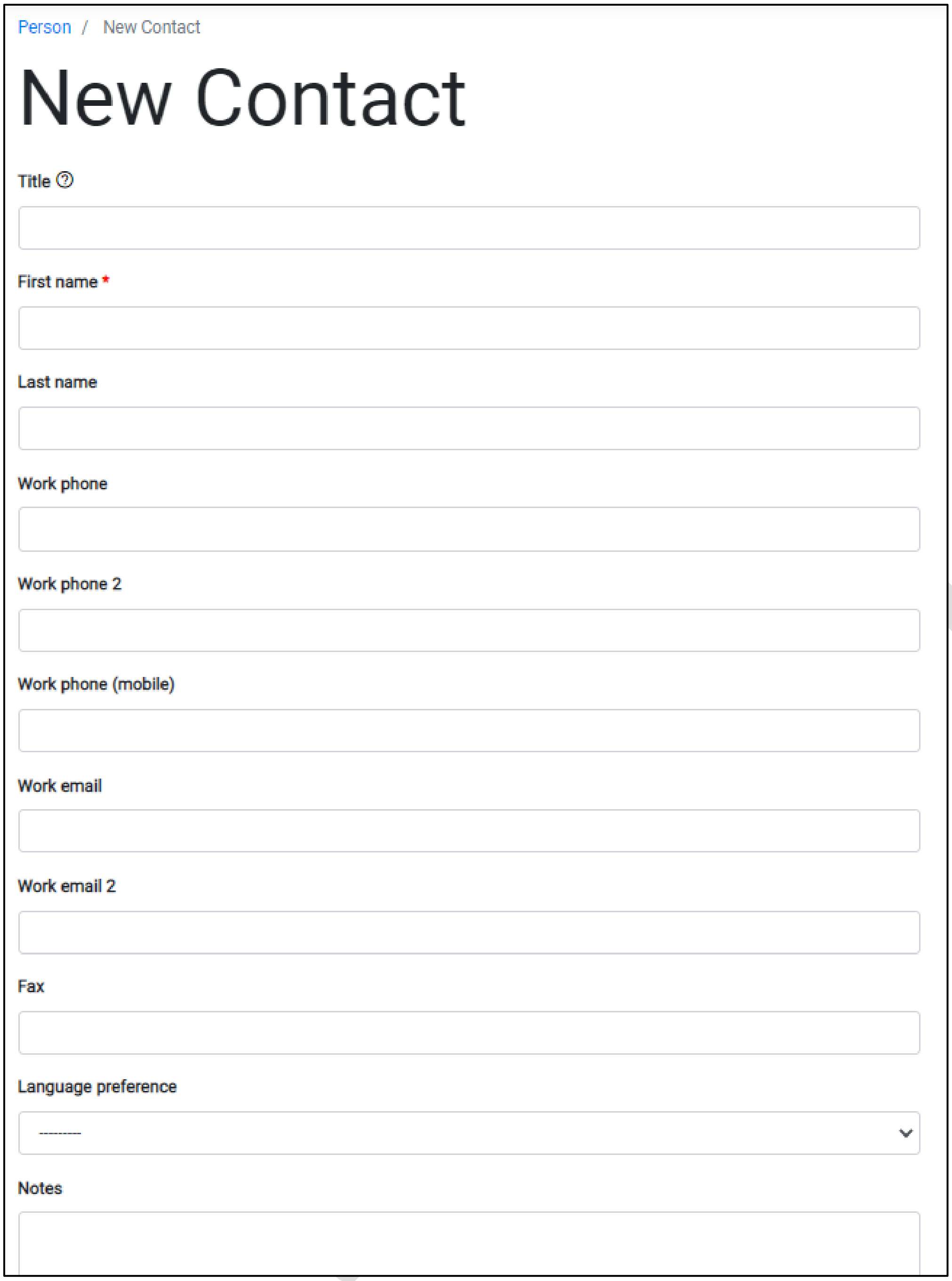


Before deleting a contact, it is recommended that you check in with the last person to have edited that contact. Similarly, if the contact is linked to committees or interactions, it is recommended that you check in with the liaison listed for those committees or interactions.

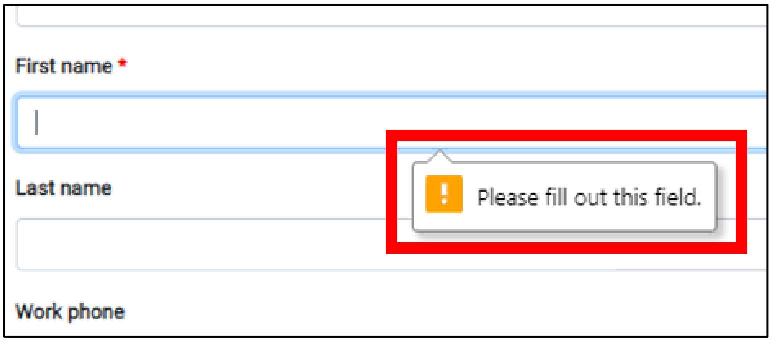
Creating a new contact

To create a new contact, click the "New" button from the contacts main page.

This will open the following page:

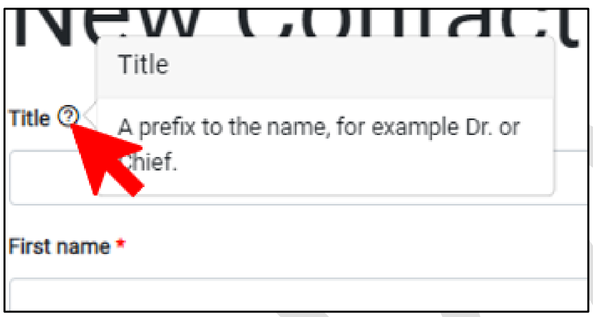


The red asterisks on this page indicate required fields. If you click “Add” at the bottom of the page before filling out the required fields, you will receive the following error message:



There are very few required fields. However, it is recommended that as many fields be filled out as possible for the purposes of information sharing.

Many data fields on this page have associated help text, indicated with the ? symbol. If you hover your cursor over the question mark, instructions and other details will come up. For example:



The following table provides an overview of contact data fields, most of which is included in the existing help text:

Field name	Description	Instructions
Title	A prefix to the name, for example Dr. or Chief.	Text field.
First name	The contact's first name.	Text field.
Last name	The contact's last name.	Text field.
Work phone	The contact's work phone. Please include an extension if applicable.	Text field.
Work phone 2	For use if the contact has a second work phone or is a member of multiple organizations, with separate phone numbers for different roles. If multiple work phones are listed, please indicate in "Notes" which phone number corresponds to which role.	Text field.
Work phone (mobile)	The contact's mobile phone, if applicable.	Text field.
Work email	The contact's work email.	Text field.

Field name	Description	Instructions
Work email 2	For use if the contact has a second work email or is a member of multiple organizations, with separate email addresses. If multiple emails are listed, please indicate in "Notes" which email corresponds to which role.	Text field.
Fax	The fax number to reach the contact.	Text field.
Language preference	To indicate in which language the contact would prefer to communicate.	Dropdown list, only one selection is possible.
Notes	Please include any relevant notes for other staff to be aware of.	Text field.
Committees/Working Groups	Please indicate all committees and working groups in which the contact regularly participates. If the relevant committee or working group is not listed, please add it to MarET via the committees page (see previous section, "Creating a new committee / working group").	The list is searchable and multiple selections are possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.
Email block	The contact's email block, if available.	Text field (copy and paste from an email).
Organization Membership	Please select all organizations with which the contact is associated. If the relevant organization is not listed, please add it to MarET via the organizations page (see previous section, "Creating a new organization".	The list is searchable and multiple selections are possible. Start typing to search the list. To select an option, either click it or hit Enter with the option highlighted.

Once you have finished filling the necessary data fields, click the yellow "Add" button at the bottom of the page. If you do not wish to save your work, either click the grey "Back" button, or navigate away from the page.

Further questions

If you have any further questions, contact Kaitlin Stansfield, Policy Research Division, Policy & Economics Branch (kaitlin.stansfield@dfo-mpo.gc.ca).