

IAATO Operational Update 2020.05

IAATO Online Assessment

August 24th, 2020

The IAATO Online Assessment for the 2020-21 season will open on **Wednesday August 26th, 2020.**

IAATO launched its new website this year which included a new design layout of Field Staff section of the website as well as the web version of the Field Operations Manual.

As part of increased security for IAATO products and increased control by Operators, **Field Staff accounts were not carried over from the previous website.**

ALL new and returning Field Staff will need to have new accounts created in order to access the Field Operations Manual and the Field Staff section.

Below you will find a set of instructions on creating accounts for your Field Staff as well as general information about the Online Assessment Platform and tools to support staff.

1. Creating Field Staff Accounts on the IAATO Website

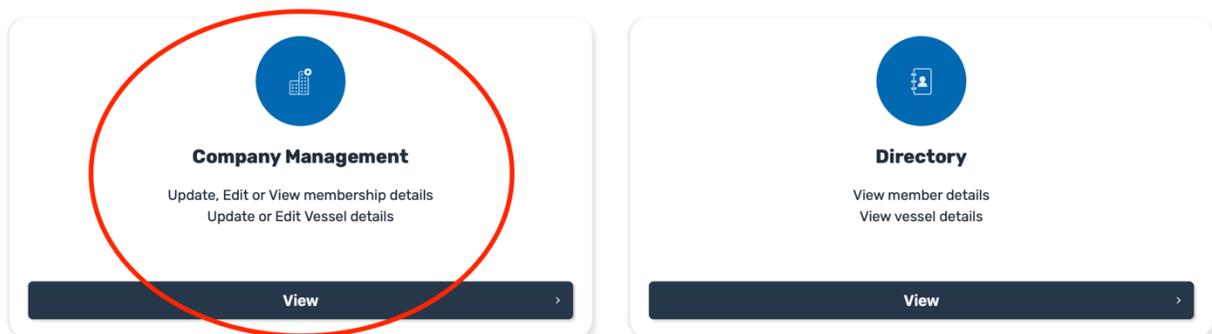
There are two ways to create accounts for Field Staff.

1. [Individual Users](#)
2. [Bulk Upload](#)

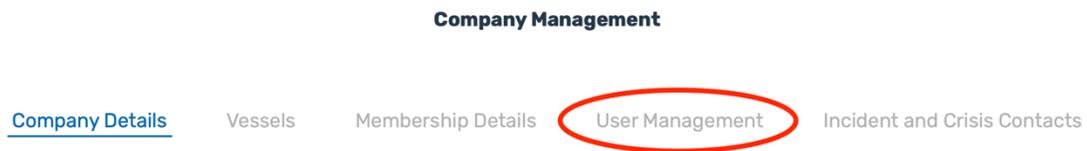
Individual Users:

1. Log into the database.
2. On the Dashboard, navigate into the 'Company Management' section.

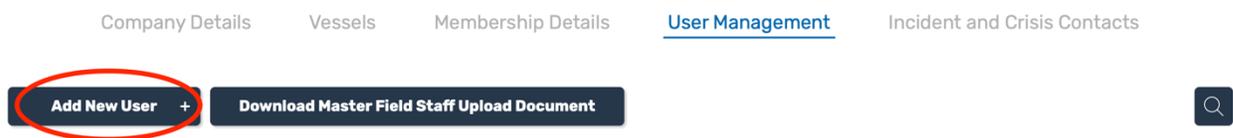
Dashboard



3. There are five tabs at the top of the page. Select the tab that says 'User Management'.



4. This page will show a list of your current staff members associated with your company. You can filter through your staff based on their role, and status of their account.
5. You can add a new user by selecting 'Add New User' in the top left corner.



6. Select the role type of the account; this will set base permissions for the user. For Field Staff, select "Operator Field Staff".

Select Role

Operator Company Admin	<input type="checkbox"/>	Operator Field Staff	<input checked="" type="checkbox"/>
Scheduler	<input type="checkbox"/>		

7. Once you select the user's role, you will need to fill in their information including, First and Last name, email and username (**Note:** Please use the email address as the username).
8. To access the IAATO website, check the box that says "Website Access". This will allow the user into the Field Staff section of the website.

Permissions

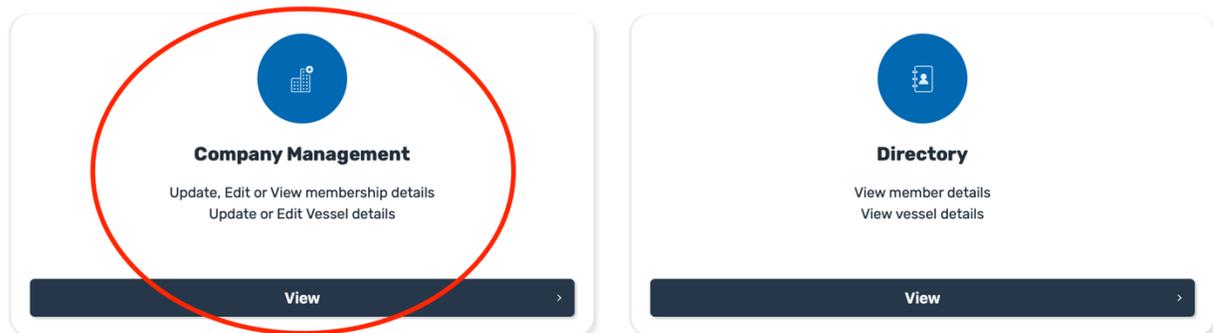
Website Access	<input checked="" type="checkbox"/>
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9. After reviewing that all the information has been entered correctly, select 'Add User'. An email will be sent to the new user to activate their account. **(Reminder: Please ask staff to check their Inbox and Spam folders to ensure they receive this email.)**

Bulk Upload:

1. Log into the database and navigate to the Company Management section.

Dashboard



2. Under Company Management, select the 'User Management' tab at the top of the page.

Company Management

[Company Details](#) Vessels Membership Details **User Management** Incident and Crisis Contacts

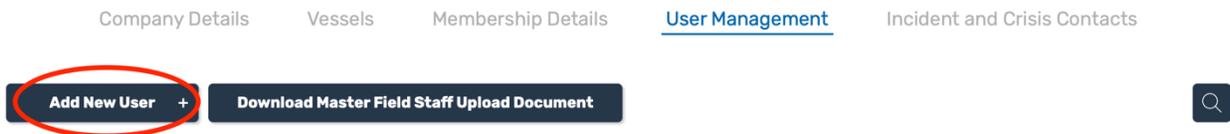
3. At the top of the 'User Management' page, download the 'Master Field Staff Bulk Upload' file. Complete this form with all Field Staff Users. (Please note: this feature is only for NEW users. **For the 2020-21 Season, ALL field staff members will technically be new users.**)

[Company Details](#) Vessels Membership Details **User Management** Incident and Crisis Contacts



4. Once you have filled out the form, you will need to turn it into a .CSV file. A macro is built into the form. To run the macro press 'CTRL + b'.
 - a. **MAC Users:** Please ensure that you select to use the "CSV (Comma-delimited) .csv" format when saving the generated file

- b. **Windows Users:** The file should automatically save into the same directory as the source file.
5. Once you have your completed .csv file, return to the database and select 'Add New User' in the top left corner.



6. On this page, you will be prompted to select a user 'Role', check the box for 'Operator Field Staff'.

Select Role

Operator Company Admin	<input type="checkbox"/>	Operator Field Staff	<input type="checkbox"/>
Scheduler	<input type="checkbox"/>		

7. Below the 'Roles' section, there is a section called "Add Field Staff Users in Bulk". Upload your .csv file to this section, then select 'Upload Bulk Set'. You do not need to fill in the rest of the information on the page, as it has been completed in the spreadsheet.

Add Field Staff Users in Bulk

Attach File*

Upload field staff users in bulk by attaching a valid .csv file.

Choose File no file selected 🔍



Upload Bulk User Set >

8. You can review all users by navigating back to Company Management>User Management.

2. Online Assessment Platform

Field Staff can continue to access the [Online Assessment platform](#) using the same logins as previous seasons. New users will need to create their own accounts.

The assessment platform has been reset to erase all previous season assessments.

Current assessment platforms available for staff include:

1. Ross Sea for Expedition Leaders and Guides
2. Peninsula for Expedition Guides
3. Peninsula for Expedition Leaders
4. Peninsula and South Georgia for Expedition Guides
5. Peninsula and South Georgia for Expedition Leaders
6. Cruise Only for Expedition Staff
7. Vessel Officers and Crew
8. Home Office Staff
9. IAATO Observers
10. Staff without IAATO employer.

Please make sure you inform your staff which assessment they should sign up for from the list above.

If you have any questions regarding the Online Assessment platform, please contact survey_test@iaato.org.

3. IAATO Helpful Hints for the Online Assessment

The IAATO Helpful Hints for taking the Online Assessment has been updated for the 2020-21 season.

This is a good resource to send out to staff to better prepare them for taking the Online Assessment. It will inform them on where to find the FOM, download the FOM Sync App, and tips on accessing the Online Assessment platform.

4. The FOM Sync App

In addition to accessing the Field Operations Manual on the IAATO Website, Field Staff can also download the FOM Sync App v4 to their desktop.

A benefit to using the FOM Sync App is the Search function. Users can search for both the Title of a document as well as by the contents within each document.

Once downloaded, the FOM Sync App can also be accessed without internet connection.

Instructions on downloading the FOM Sync App and download links for Mac and Windows computers can be found in the [Field Staff section of the IAATO website](#).

If you have any questions, please email Erin Delaney (edelaney@iaato.org).