National Marine Fisheries Service

Dealer Data Mapping

Fisheries Data Service (FDS)

Field IDI Team

Northeast Regional Office (NER)

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Document History

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1 Introduction

This document describes how to address specific issues regarding dealer data submitted to the Fisheries Data Services (FDS) Division of the Northeast Regional Office (NERO) of NOAA Fisheries. FDS Field IDI personnel have responsibility of assisting federally licensed seafood dealers with upholding accurate reporting practices as it relates to three software applications; SAFIS-K, SAFIS-U and Trip Ticket.

Note: Edits to existing dealer data should be made in accordance with the dealer, by the dealer. Any internal edits are to be submitted to and conducted by DMS as established in the *Dealer Data Corrections Process v3,* which can be referenced at **`H:\FSO QA Program\Data Quality Documents & Tools.`** It is also important to ensure that there are no identical investigations pending in either JIRA or NERC in order to avoid duplication of effort. Verify with the QA Team Task Lead if you do not have access to NERC at this time.

2 SAFIS-K

SAFIS-K is a real time, web based reporting program that allows federal dealers to submit individual landing reports.

- SAFIS-K can be accessed at http://warsaw-grouper.accsp.org:7777/pls/htmldb_safis/f?p=200:101:2531851346347302.
- The system will request a username and password in order to log in. Contact your system administrator to set up an account.

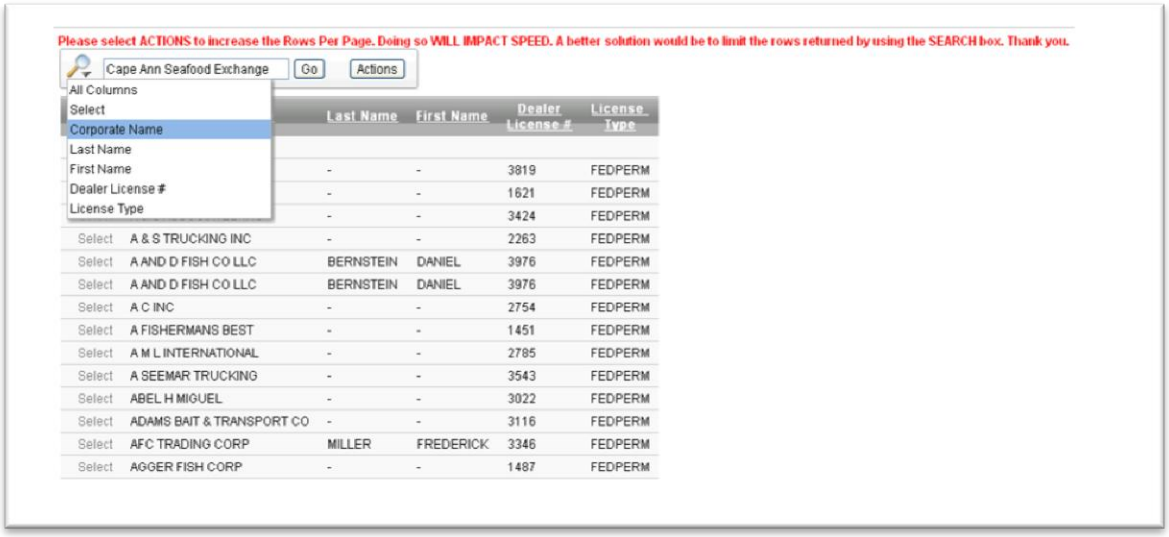
Note: Refer to the Electronic Dealer Reporting (eDR) Application handbook for instructions on how dealers complete and submit reports. This can be found on the Electronic Dealer Reports (eDR) home page, which we will discuss further in the following sections.

2.1 Amending Existing Dealer Reports

On the SAFIS Applications home page, select SAFIS Electronic Dealer Reports (eDR) - Data Entry.

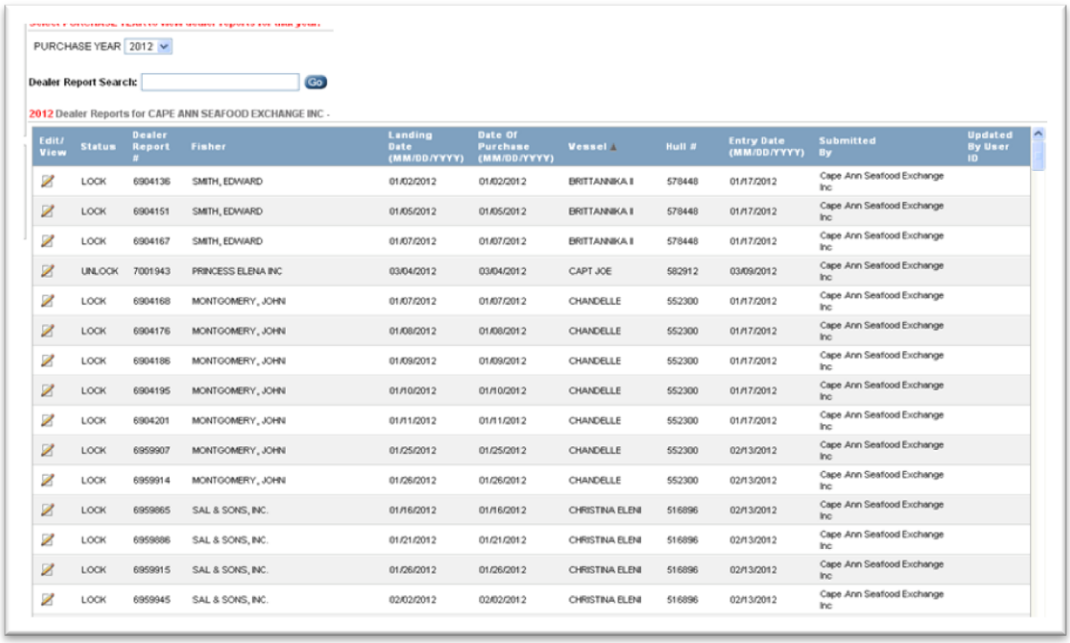
Any amendments or edits to existing dealer reports in SAFIS-K can be made by doing the following:

1. Locate the dealer you wish to work with.
   a. On the SAFIS Applications home page, select *SAFIS Electronic Dealer Reports (eDR) - Data Entry.*
   b. You should now see the Electronic Dealer Reports (eDR) home page. In the search box, query for multiple fields including dealer name, owner name (first and last) and dealer permit number. Select *Go* to filter your results. Selecting *Actions* allows you the option of formatting your filtered results.



c. Select the specific dealer from the list of filtered results.

2. Locate the specific report you wish to amend:
   a. The following screen will show the entire list of reports submitted by the dealer for the most recent year. Update the year by selecting from the drop down box titled "Purchase Year". You can filter further by querying for multiple categories in the "Dealer Report Search" box including dealer report number, landing date, purchase date, vessel name, hull number and entry date. Select *Go* to narrow your results.

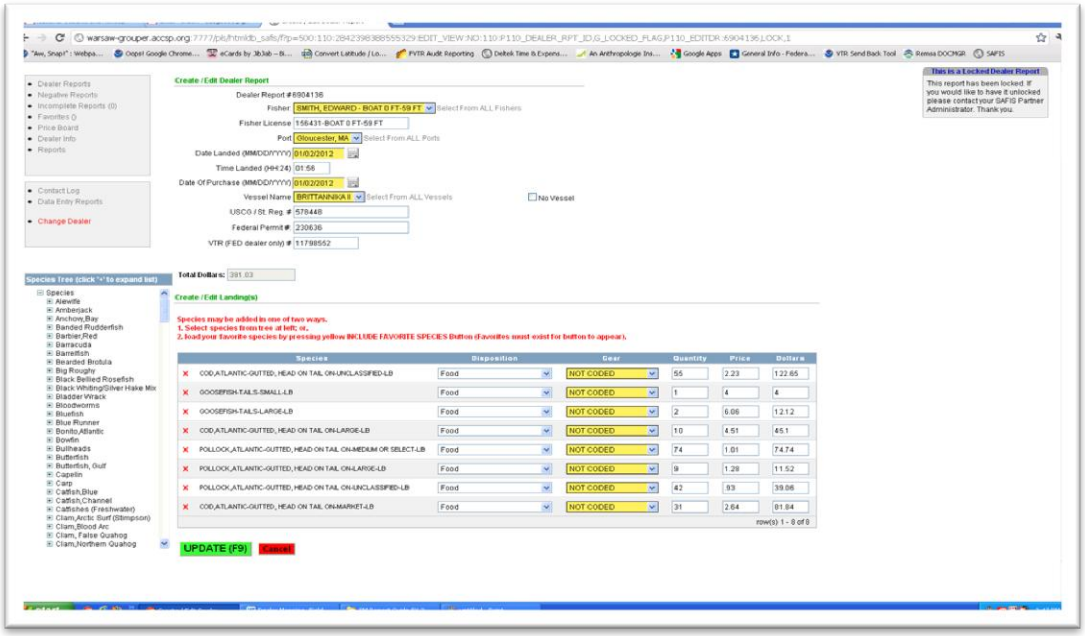


   b. Locate the dealer report you wish to amend in your newly filtered list. Clicking on the headings highlighted in blue allows you to sort the current list by that column.

For instance, clicking on *Vessel* will arrange the vessel names in alphabetical order. Clicking on *Entry Date* will arrange the list in date order.

3. Records can be unlocked and edits made once logged into **the dealers account**; log out of the existing account and log back in as the dealer. Special permissions are required to unlock a record; contact your systems administrator for proper access.
4. Select *Edit/View* next to the dealer report you'd like to edit
5. You now have the ability to edit selected fields. Under "Create/Edit Dealer Report", the dealer should be encouraged to complete all yellow highlighted fields (all are required with the exception of Gear and Date Landed). Edits will not be saved unless these are complete. Although the remaining fields are not required to save, they should still be completed to avoid any incomplete data.

Note: Incomplete data is considered any submitted dealer report missing price, dollars or VTR number, which we will discuss in greater detail in the following sections of this guide.



- Edits under heading "Create/Edit Dealer Report"
  - *Select from ALL fishers; ports; vessels* allows you to search and select from a complete, active listing of each in the database.
  - Selecting the "No Vessel" box indicates that the catch was not landed on a vessel, but rather on shore.
- Edits under "Create/Edit Landings"
  - Species lines can be deleted by clicking on the red **X** located to the left of the species name.
  - Species can be added by either selecting from the "Species Tree" located to the left of the edit fields or by loading the dealers pre-selected

Favorites List, which we will discuss in greater detail in the following section.

- "Disposition" and "Gear" can be edited by clicking on the drop down boxes and selecting from the dealers Favorites List or by *Select From All* which allows you to select from a complete, active list of each in the database.

6. Select *Update* to save all edits.

Field IDI team members may also choose to print out a specific dealer report as a reference when attempting to resolve an issue. This can be done with any records submitted through either SAFIS-K, SAFIS-U and Trip Ticket. To do so, proceed to the following steps:

1. On the SAFIS home page, select *SAFIS Electronic Dealer Reports (eDR)- Reviewer.*
2. Enter the dealer name or dealer permit number.
3. On the left hand side of the screen, click on *Reports.*
4. Highlight and click on *Dealer Reports*.
5. Set search parameters:
   a. Type in the vessel name or specific dealer report if known (entering "Unknown" will result in all of the entries submitted with unknown vessels and/or fisherman's license number.
   b. Click on the *time frame of entry dates?* to search.
6. Click on the "Print xxxxxxx" dealer report id to show the entered trip report
7. Click on the printer icon- click on the down arrow to select the desired printer.
   a. PDF can be saved to the computer and used if e-mailing the record to the dealer.
   b. Printer prints to paper for hard copy if hand delivering the record to the dealer.
8. Click the *Refresh* button to reset your search parameters.

2.2 Maintaining Favorites

The "Favorites" feature was created to allow for a more convenient reporting experience by automatically adding frequently used selections to the dealers "Favorites List". The Favorites page can be utilized for three areas: fishers, gears and species. Dealers should be encouraged to review lists and clean out any irrelevant data on a regular basis. Proper maintenance is important to reduce the potential for reporting errors.

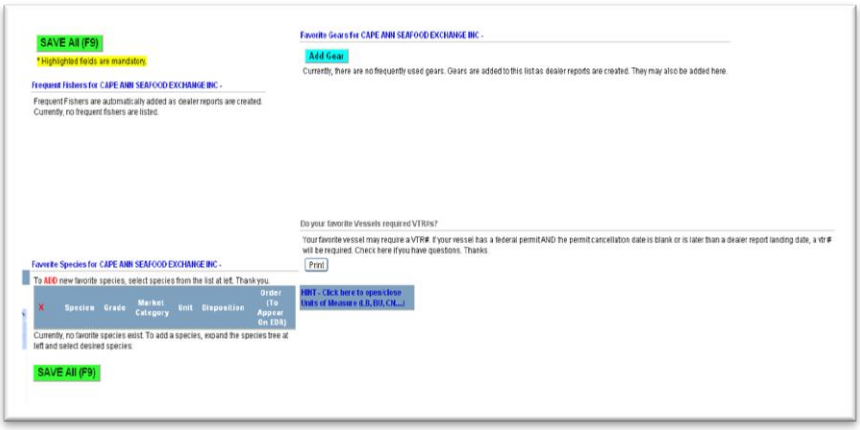
Note: Each time a fisher is added to a dealer's Favorites List, it is automatically linked to the vessel and port landed for the record created. Fishers, vessel and port are saved and selected as one unit in the dealer's Favorites List for future use. It is important that dealers review the selection to ensure that the correct combination of fisher, vessel and port are being utilized. Multiple combinations can be created and saved in the Favorites List. Unknown Vessels *cannot* be saved as Favorites.

Dealer Favorites can be accessed and maintained by doing the following:

1. Locate and select the dealer you wish to work with on the eDR home page by querying the "Select A Dealer" search box (refer to section 2.1, step 1, for specific instructions).

2. Select *Favorites* located at the top left hand corner of the screen.

3. Favorites lists for the selected dealer should now appear on your screen.



4. Selecting *Save All* will save all edits made to each of the three lists.

2.2.1 Frequent Fishers

Fishers are automatically added as dealer reports are created.

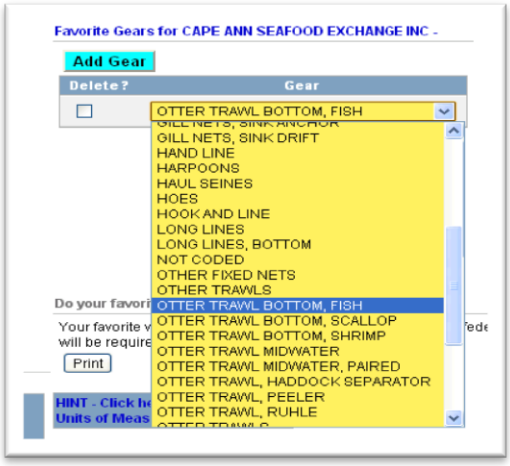
- Search the list by querying the search field by fisher, vessel name, port or license and clicking *Go*.
- Deleting a fisher occurs when selecting the *Delete?* box located to the left of the fisher name and then clicking *Delete Fisher*. Fishers cannot be edited, only added and deleted.
- You can temporarily remove a fisher by marking it as “Inactive”. These can be re-activated at a later time by unselecting the “Inactive” box.

Note: Fisher favorites are automatically saved when selecting a vessel and/or port landed. The same fisher can occur multiple times in the Frequent Fishers list is the fisher has sold catch from several different vessels and ports. It is important that dealers are aware of this, especially if purchasing from a vessel that may land in various states.

2.2.2 Frequent Gears

Gears are automatically added as dealer reports are created. They can also be added by selecting *Add Gear* on the dealer’s Favorites page.

- Add a new gear by clicking *Add Gear*, selecting from the drop down list, and once again clicking *Add Gear*. All gear types are listed in alphabetical order. If you do not see the gear you are searching for, contact your SAFIS-K administrator.

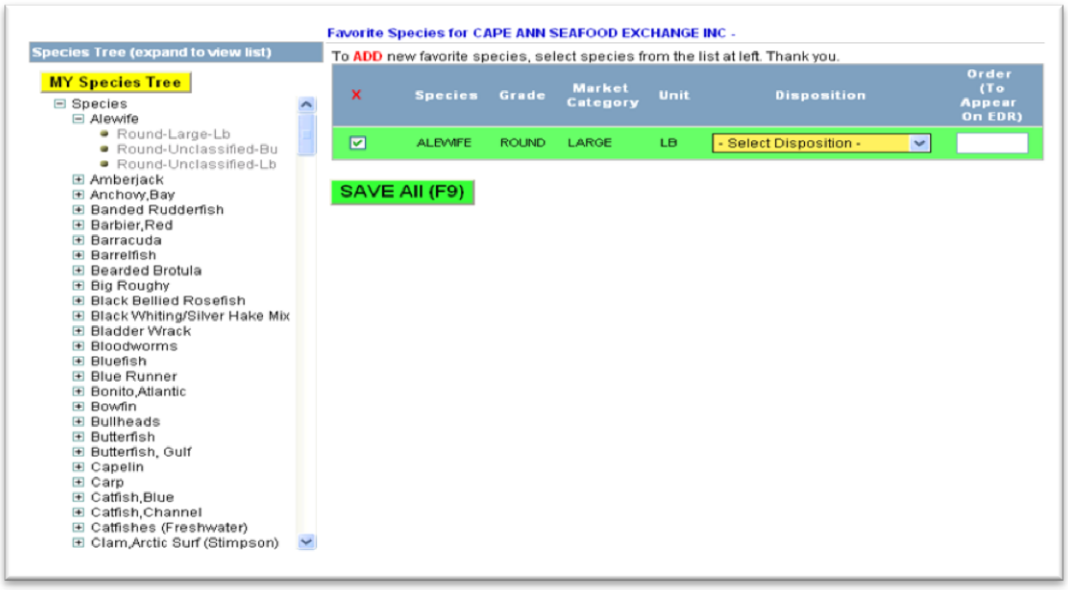


- Deleting a gear occurs when selecting the "Delete?" box located to the left of the gear name and then clicking the red *Delete Gear(s)* button.

2.2.3 Frequent Species

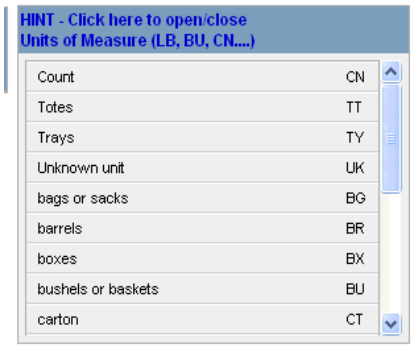
Species are automatically added as dealer reports are created. They can also be added by selecting from the "Species Tree" located on the dealers Favorites page.

- Add a new species by scrolling to the desired item on the "Species Tree" located at the bottom left of the screen. Expand the selection for the chosen species and select a classification (grade, market category and unit of measure). Select a disposition for the species before saving. Favorite species can be organized by customizing the "Order" column as seen to the right of each species.



- Clicking on “MY Species Tree”, highlighted in yellow, also allows the dealer to personalize their species Favorites list. Any species added to the list from the favorites menu is automatically added to the dealers Species Tree. However one can also add, delete and modify from selecting this option as well.
- Deleting a species occurs when selecting the “Delete?” box located to the left of the species name and then clicking on the red **X**.
- The HINT feature elaborates on the abbreviations listed for units of measure.

Note: Units of measure should be selected carefully, as some are based on calculations which convert to pounds. Selecting the incorrect unit of measure could cause discrepancies within the quota monitoring process.



2.3 Incompletes and Unknowns

2.3.1 Incomplete Reports

Any submitted report that is missing price, dollars or VTR # is considered incomplete. Dealers should be encouraged to fully complete each submission and amend any previously submitted reports that are currently considered incomplete.

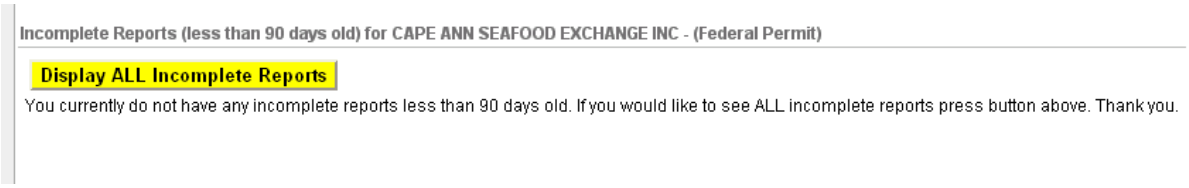
Note: The VTR # field is variable depending on a vessels reporting requirements. If a vessel is not required to submit a VTR, this field can be left blank. If left blank, SAFIS-K will initially prompt the user to input a VTR #, but will eventually allow you to proceed.

Incomplete dealer reports can be located and addressed by doing the following:

1. Locate and select the dealer you wish to work with on the eDR home page by querying the “Select A Dealer” search box (refer to section 2.1, step 1, for specific instructions).
2. Select *Incomplete Reports* located at the top left hand corner of the screen.

- The number of incomplete reports under 90 days old will appear in the parentheses next to *Incomplete Reports*.
- Selecting *Display ALL Incomplete Reports* will display all incomplete reports, regardless of age.

Note: Selecting this option may result in numerous results over an extended period of time.



2.3.2 Unknown Vessels and Fishers

Although there are selections included for unknown vessels and fishers, there are very few valid cases where a vessel is actually considered an "Unknown". All vessels should have either a State Registration or USCG Hull number assigned as a means of identification. Refer to the *Dealer Data Corrections Process* document for further instructions on how to correct these issues. If you cannot find a specific option that you are searching for, contact your SAFIS-K administrator.

Note: The *Dealer Data Corrections Process* document can be found at **`H:\FSO QA Program\Data Quality Documents & Tools.`**

3 SAFIS-U

SAFIS-U is a web based, file upload module that provides dealers a method of reporting individual landing reports by uploading data from a file to the electronic reporting database. Dealers can create data file definitions which link plain worksheets into conversion tables, translating the dealer's raw data into an uploadable record used by NMFS.

- SAFIS-U can be accessed at http://safis.accsp.org.
- The system will request a username and password in order to log in. Contact your system administrator to set up an account.

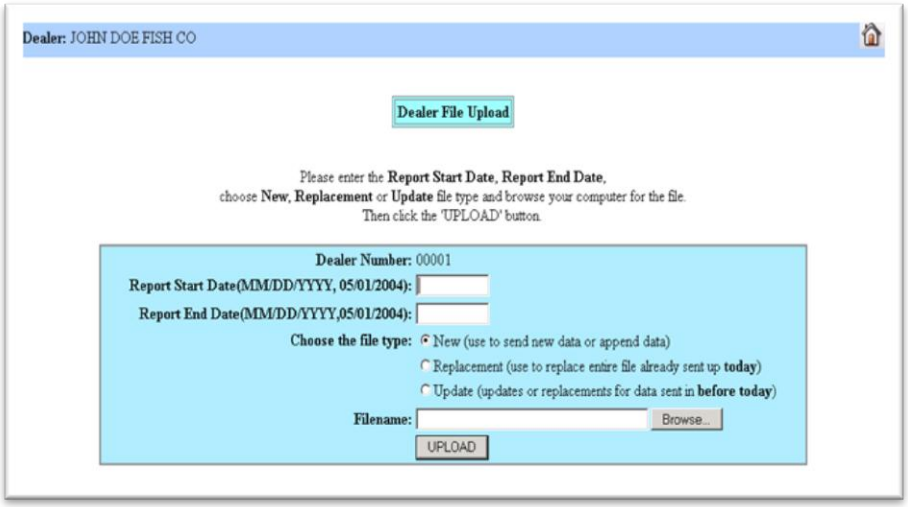
Note: Refer to the *SAFIS Electronic Reporting File Upload Guide Version 2.1* for full instructions on how dealers complete and submit reports. Contact your system administrator for a copy of the user guide.

3.1 Amending Existing Dealer Reports

On the SAFIS-U Dealer Data Upload home page, select *Upload Data*.

Any amendments or edits to existing dealer records in SAFIS-U can be made by doing the following:

1. On the Dealer File Upload page, enter the Report Start Date and Report End Date. If the landing data is from a single day trip, the report start and end date will be identical.
2. Choose the file type.
   - "New" is only to be used when uploading a new record. This option can be disregarded in the occasion of amendments.
   - "Replacement" can be used to substitute an existing record with an amended copy within the same day.
   - "Update" can be used to substitute an existing record with an amended copy after the initial day of upload.



3. Click on *Browse* and select the file containing the amended copy of the original record.
4. Click on *UPLOAD* to display the dealer data.
5. A display of the dealer's raw data on the screen will indicate that the file successfully uploaded. If the dealer's conversion tables are complete, select *CONFIRM this DATA*. This option will convert the raw data to the acceptable SAFIS-U upload format and will display for final review. If the dealer has not yet completed their conversion tables, select *POPULATE Conversion Tables* to return and build the conversion tables.

6. If the data displays error free, click on *LOAD Data* located at the bottom of the screen to insert into the SAFIS-U database. If unsatisfactory, select *EXIT Without Saving this File* to return to the main menu.
7. An upload confirmation page will display for successfully completed data stating that "This File has been saved and is COMPLETE". If incomplete data is detected, a "File Upload Confirmation Page for Incomplete Data" will appear on the screen indicating the specific errors found. Returning to the *Main Page* allows the dealer to continue to modify and correct the incomplete data.

Note: Records uploaded through SAFIS-U are locked sixteen days, or at the end of the calendar month (whichever is longer), from submission. Contact your SAFIS-U administrator to unlock a record.

3.2 Maintaining Data Definition Files and Conversion Tables

SAFIS-U will not allow for a save or upload of records before establishing Data Definition Files and Conversion Tables. The Data Definition File must be created prior to loading any data files; the Conversion Tables can be created during the dealer's first successful upload and saved on the SAFIS-U database for future use. They can be modified as necessary for impending uploads.

3.2.1 Dealer Data Definition Files

In order to successfully upload a record, dealers must first define the layout of their raw data by using the Data Definition Form. The completed Data Definition Form records the order of that dealer's raw data. This can be output from basic workbooks, spreadsheets or accounting software (see Table 1 for required data fields).

To make changes to the Data Definition File:

- Choose the "Create or Change Data Definition File (including defaults)" from the Dealer Data Upload Site.
- Indicate the column position for each category using the field boxes.
- If identical for all entries, the dealer may also choose to set default values for Port Landed and Species Disposition. If the disposition varies or is unknown, select the blank code located in the drop down list.
- On the Data Definition Form, use the *Submit* button or *Enter* key to save. When the data definition updates are saved, a confirmation page will be displayed. Return to the *Main Page* for further options or select *Close Window* to exit.

Table 1. Required Dealer Data Definition Fields
(Provided by SAFIS Electronic Reporting File Upload Guide Version 2.1, Appendix A)

Column Name	Data Type	Description

Column Name	Data Type	Description
Ticket Number	Text	Whatever the dealer uses to identify purchases from a vessel/fisherman landed on a specific date. The Ticket Number is required to prevent duplicate reports to process update or replace data.
Date Landed	Date	Date the catch was landed; must be a valid date in MM/DD/YY(YY) format.
Port Landed	Text	Where the catch being purchased was landed; can be a port name, dealer's port code, or the SAFIS State + Place + County codes; can be in the data file or assigned as a default if all purchases in the file being uploaded were landed at the same port. Requires conversion table if dealer codes are used.
Vessel	Text	The vessel that landed the catch being purchased; can be the Federal vessel permit and/or the vessel registration (State or USCG), or the Vessel name or dealer's vessel code. Requires conversion table if dealer codes are used.
Fisherman	Text	The fisherman that landed the catch being purchased is required for state reports; can be the fisherman's name, dealer's code, or the State Commercial Fishing (CF) License number. Requires conversion table if dealer codes are used.
Species	Text	Species, grade, market category and unit of fish being purchased; can be the dealer's code or description, or the SAFIS Species + Grade + Market + Unit codes. Requires conversion table if dealer codes are used.
Quantity	Number	Quantity of species being purchased.
Price or Dollars	Number	Unit Price or Dollar Value of the species purchased.
Species Disposition	Text	Disposition (utilization) of the species purchased; can be in the data file or assigned as default if all purchases in the file being uploaded have the same disposition.
VTR Serial Number	Text	Vessel Trip Report serial number, from the dealer's copy, is required for Federal mandatory reports.

Note: Price and Disposition can be added later, if the information is not available at the time of upload. However, these fields are required to successfully complete the report.

3.2.2 Conversion Tables

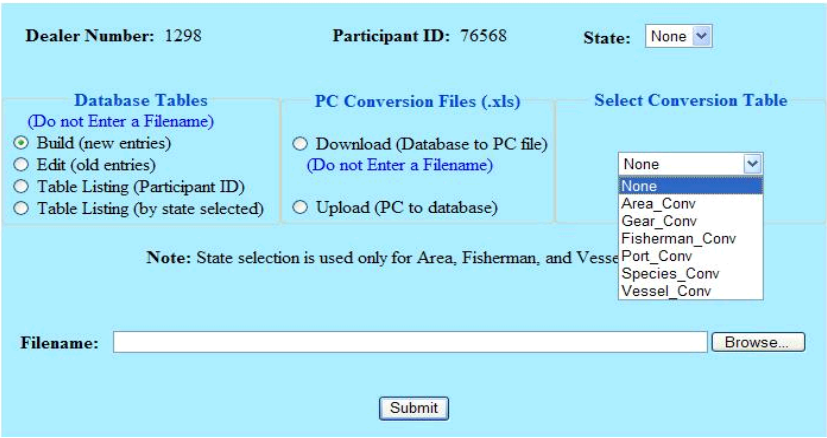
On the Data Definition File Form, field names marked with an asterisk require a conversion table to successfully convert dealer code to SAFIS code. These categories include **Port Landed**, **Vessel**, **Species**, **Area** and **Gear**. Conversion tables are always mandatory for **Fisherman**.

- From the SAFIS Conversion Table (Upload/Download) Menu option.
  - Select from the options displayed under "Database Tables".
- From the Dealer Data Upload Site Main Menu's "Conversion Tables" option.
  - Select *Create or Change Data Conversion Tables (species, vessel, etc.).*

The edit option in SAFIS-U is used only to modify existing conversion tables that translate the codes to corresponding SAFIS codes. This can be accessed in two ways.

To make changes to the Conversion Tables:

- Under "Database Tables," select *Edit (old entries).*
- Under "Select Conversion Table", select the table to be modified.
- Select a state from the drop down box located at the top right hand corner of the screen, only for Area, Fisherman or Vessel.



- Click on *Submit* and the existing code conversion will be displayed.
- To update an item on the existing table, select a new code from the drop down list which will provide a master list or SAFIS codes. Hasten your search by manually typing in the first letter of the SAFIS code and the list will automatically skip to items beginning with that letter.
- When complete, select *Submit* to save the modified data.

Note: Currently, there are three federally permitted dealers that do not utilize conversion tables for **Port** and **Species**: DLR #1298 BLUE RIBBON FISH CO. INC.; DLR #779 FRANK W WILKISSON INC and DLR #1987 FAIR FISH CO. Alternatively, they enter the appropriate SAFIS code into their Dealer Definition File so that the step of conversion is unnecessary. The

option to use SAFIS codes for Port, Species, Area, Gear and Vessel Registration are available to all dealers (in lieu of a conversion table), although most have chosen not to use this technique. Presently, the only dealers that utilize this feature are the three mentioned above.

3.3 Incompletes and Unknowns

According to NMFS procedures, any submitted report that is missing a VTR serial number is considered incomplete. Although SAFIS-U software does not require price, disposition or VTR serial number to successfully upload a record, dealers should be encouraged to fully complete each submission and amend any previously submitted reports that are currently considered incomplete.

While there are codes for unknown vessels and fisherman, they should not be used for reporting purposes and will need to eventually be resolved. There are very few valid cases where a vessel is actually considered an "Unknown". All vessels should have either a state registration or USCG Hull number assigned as a means of identification. Refer to the *Dealer Data Corrections Process* document for further instructions on how to correct these issues. If you cannot find a specific option that you are searching for, contact your SAFIS-U administrator.

Note: The *Dealer Data Corrections Process* document can be found at **`H:\FSO QA Program\Data Quality Documents & Tools.`**

4 Trip Ticket

Trip Ticket is an automated database program that provides federal dealers an alternative method of submitting individual landing reports.

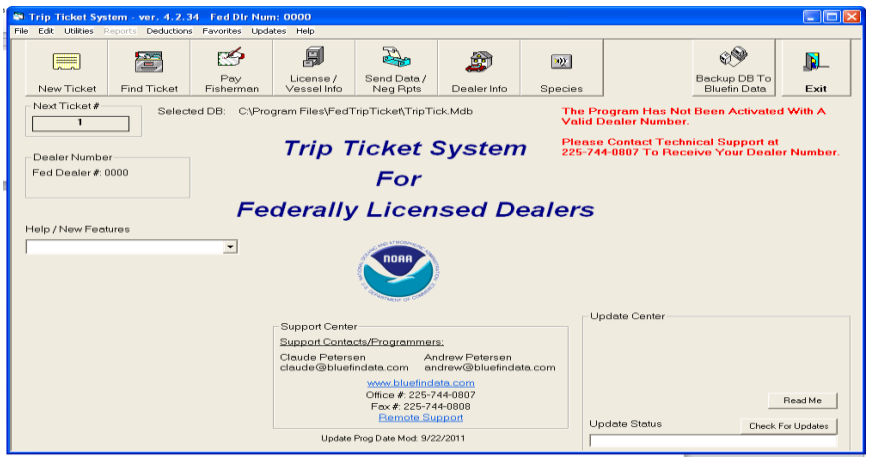
a. Download the Trip Ticket system at www.bluefindata.com.

Note: Refer to the Federal Dealer Trip Ticket Manual for instructions on how dealers complete and submit reports. Contact your system administrator to request a copy.

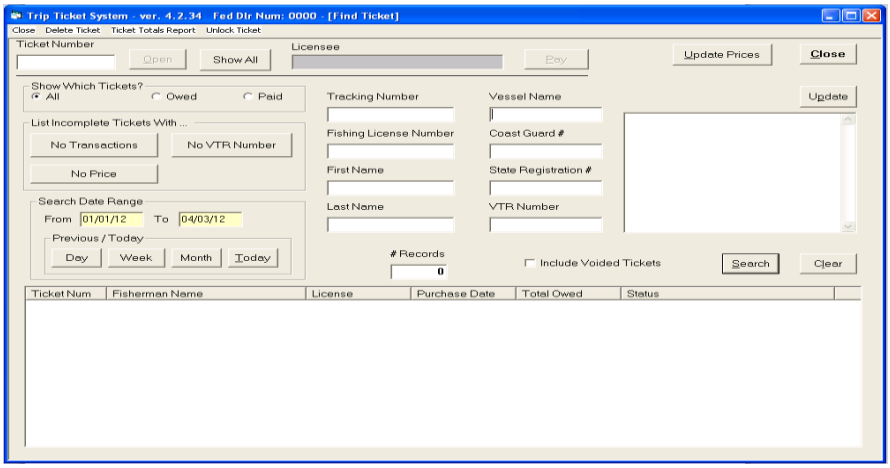
4.1 Amending Existing Dealer Reports

Trip Tickets may be edited freely within three business days of submission. Any amendments or edits to existing dealer reports can be made by doing the following:

1. Locate the specific report you'd like to amend.
   a. On the Trip Ticket home screen, select *Find Ticket*.



b. Query by a single or multiple fields including sail/land date range, vessel name, VTR #, operator name, hull number and/or trip ticket number and click *Search*. Search results will display in the window at the bottom of the screen or the user will be notified that there are "No Matching Records Found".



2. On the Find Ticket screen, scroll through the results lists and locate the dealer report to be edited. If after three days from submission, unlock the existing ticket by selecting "Unlock Ticket" located on the tool bar. This action requires a 9 digit code which is provided by your Trip Ticket administrator. Select the "Ticket Number" and click Open.

Note: Trip Ticket never locks the Price and VTR serial number fields. Therefore, unlock codes are not needed if edits are required to these fields.

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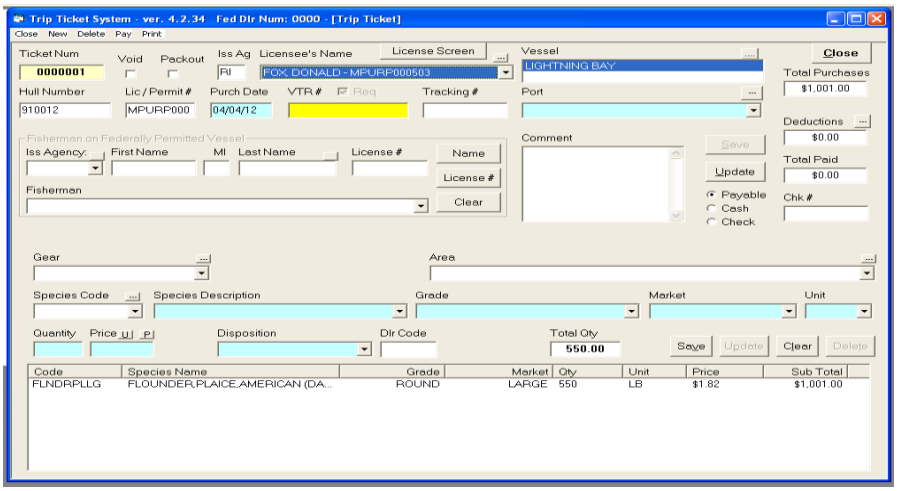
3. Selected fields can now be edited. Dealers should be encouraged to complete all fields in order to avoid any incomplete data.



Note: NMFS regulations consider incomplete data to be any submitted dealer report that is missing price, VTR number or disposition. Trip Ticket always requires a price (even if this value is zero) and a disposition. The software will accept a submission without a VTR number, but will prompt a reminder before saving.

- Fields can be edited by selecting options from the drop down boxes or modifying the text fields.
- The system will prompt a message if an error is detected and will not allow a save until corrected.

4. Once the desired edits are made, click on the selected header's designated *Update* button to save. If a species transaction record is edited, then select the species *Update* button to save. If an edit has not been saved by selecting the correct *Update* button, then the system will also ask "Save Changes Before Exiting?" Select *Yes* or *No*.
   - To permanently delete an existing ticket, select by clicking on the ticket number and then selecting *Delete Ticket* located on the tool bar. Locked tickets may not be deleted.
   - To clear all fillable fields, select *Clear*. This option does not delete the actual ticket.

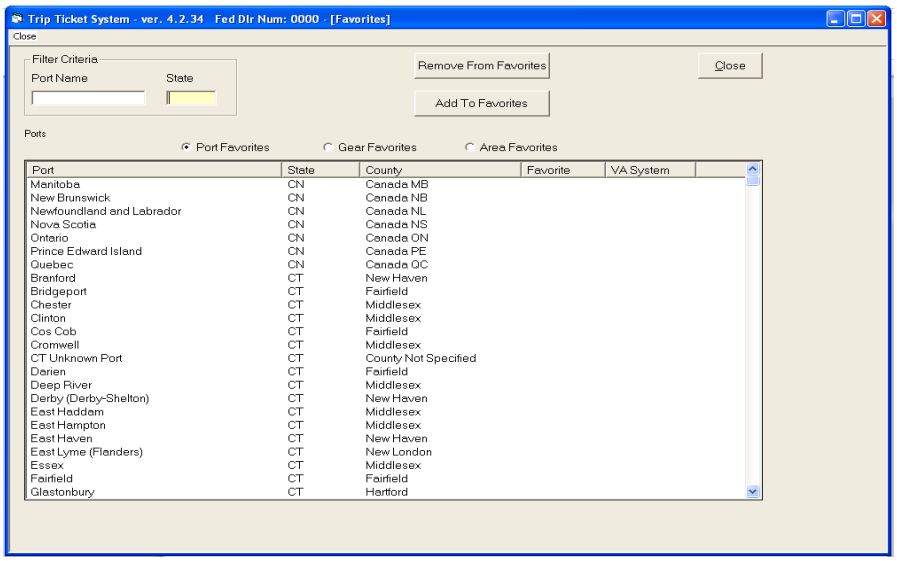
Note: Records created through Trip Ticket can also be amended in unison with SAFIS-K. Simply log into the SAFIS-K program and query for the report (refer to section 2.1 for specific instructions).

4.2 Maintaining Favorites

Trip Ticket also offers the option of tailoring Favorites lists for convenience. This feature is used by customizing shortened code lists frequently used by the dealer. The Trip Ticket Favorites screen can be utilized for four areas: gear, port, area and species. Dealers should be encouraged to review lists and clean out any irrelevant data on a regular basis. Proper maintenance is important to reduce the potential for reporting errors.

Dealer Favorites Lists can be accessed and maintained by doing the following:

1. Select *Favorites* located on the toolbar on the home screen.



2. Select “Port Favorites”, “Gear Favorites” or “Area Favorites”.

4.2.1 Port, Gear and Area Favorites

Ports, gears and areas are automatically added to the Favorites List as the Trip Tickets are created. They can also be manually added by selecting “Port Favorites”, “Gear Favorites” or “Area Favorites” on the Favorites screen.

Note: To activate the Favorites feature, ensure that the dealer has enabled the use of all Favorites Lists. On the home screen, select *Dealer Info*, and mark “Port Favorites”, “Gear Favorites” and “Area Favorites” and *Update* to save. When enabled, the available selections will default to the pre-determined Favorites list when creating tickets. This can be reversed at any time by disabling the feature.

- Selections can be added by scrolling through the complete list presented, highlighting the desired item and clicking on *Add to Favorites*. A query can also be made by typing in the name in the search boxes.
- Selections can be removed by highlighting the item and clicking on *Remove From Favorites*.
- Select *Close* when complete.
- If you do not see the selection you are searching for, contact your Trip Ticket administrator.

4.2.2 Species Favorites

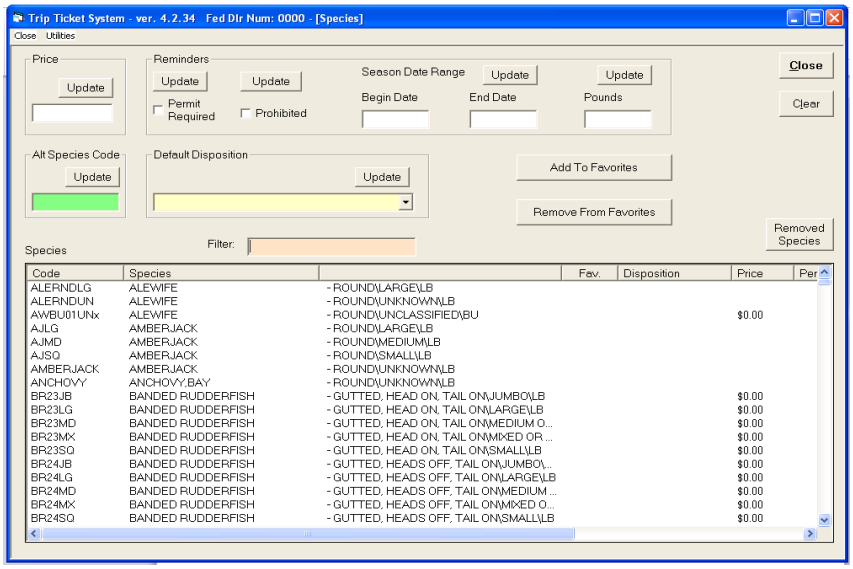
Species are automatically added to the Favorites List as the Trip Tickets are created. They can also be manually added by selecting the *Species* button on the home screen.

Note: Ensure that the dealer has enabled the use of its Species Favorites List. On the home screen, select “Dealer Info”, and mark “Species Favorites” and “Update” to save. When

enabled, the available selections will default to the pre-determined Favorites list when creating tickets. This can be reversed at any time by disabling the feature.

- Species can be added by scrolling through the complete list presented on the bottom half of the screen, highlighting the desired item and clicking on *Add to Favorites*. A query can also be made by typing the species name in the "Filter" box, highlighted in orange.
- To specify saved species, the option to add and update further details exists. Modify fields such as price, disposition and season date range and click on *Update* to save.
- Species can be removed by highlighting the desired item and clicking on *Remove From Favorites*.
- Selecting *Clear* will not delete a selection, but rather clear all existing fields.
- To view or edit any species previously listed as a Favorite, select *Removed Species*.

Note: Dealers are encouraged to edit species codes to something they will remember easily. Although not official codes, this allows the dealer to quickly make a selection on the Ticket screen. Official species names may not be edited.



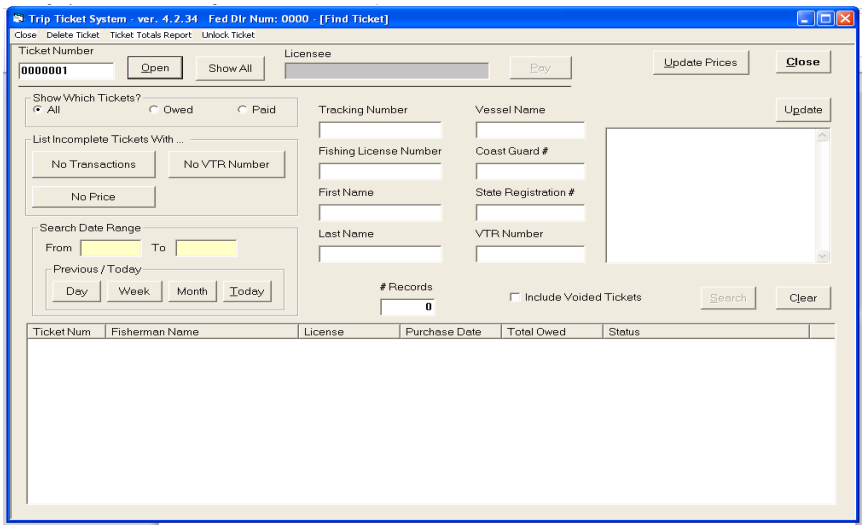
4.3 Incompletes and Unknowns

4.3.1 Incomplete Tickets

Any submitted report that is missing price, VTR # or disposition is considered incomplete by NMFS and will be flagged as inadequate once submitted. Although VTR number is not required by Trip Ticket to submit a record, dealers should be encouraged to fully complete each submission and amend any previously submitted reports that are currently incomplete. A ticket that has completed header information, but lacks species, will be considered incomplete by the software.

Incomplete dealer reports can be located by doing the following:

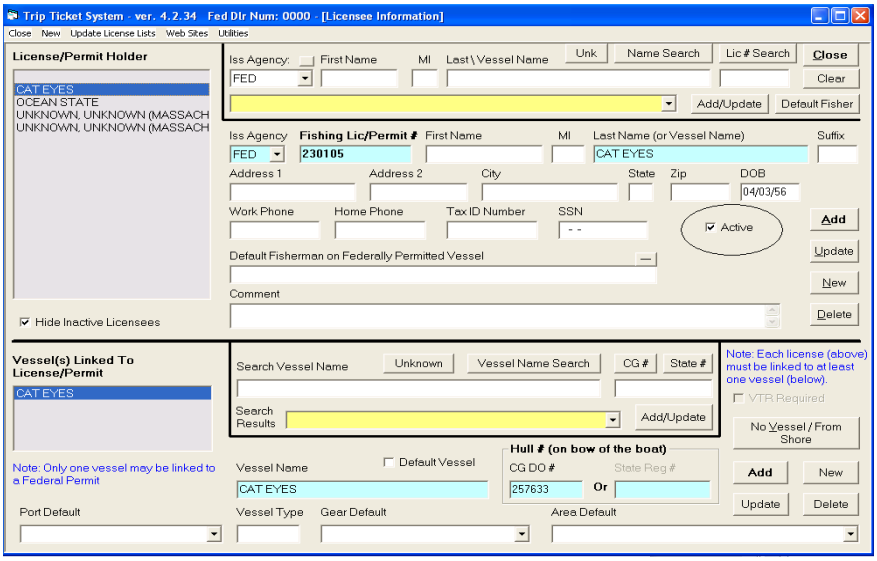
1. On the Trip Ticket home screen, select *Find Ticket*.
2. In the section titled "List Incomplete Tickets With…" select either *No Transactions*, *No Price* or *No VTR Number*. Results will show in the box located at the bottom half of the screen.



3. Double click on the desired ticket number to open and edit the existing ticket.

4.3.2 Unknown Vessels and License Holder

When creating a new ticket, a federal fishing license will automatically be linked to the corresponding vessel name. On the ticket screen, the dealer should select the fishing license from the drop down box and then choose only those vessels linked to the license. In the case that a vessel is no longer federally permitted, the dealer must manually mark the vessel as "inactive" in the software. This can be done by selecting the *License/Vessel Info* button located at the top of the home screen, highlighting the specific License/Permit Holder and then unselecting the "Active" check box. Clicking on the *Update* button located just to the right will save the change. This process removes the vessel license from the list view, but maintains the license for historical purposes.



Although there are options available for unknown vessels and license holder, they should not be used for reporting purposes and will need to eventually be resolved. If you cannot find an option that you are searching for, contact your Trip Ticket administrator

5 System Administrators

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