



Genus RMT (EMS)

TABLE OF CONTENTS

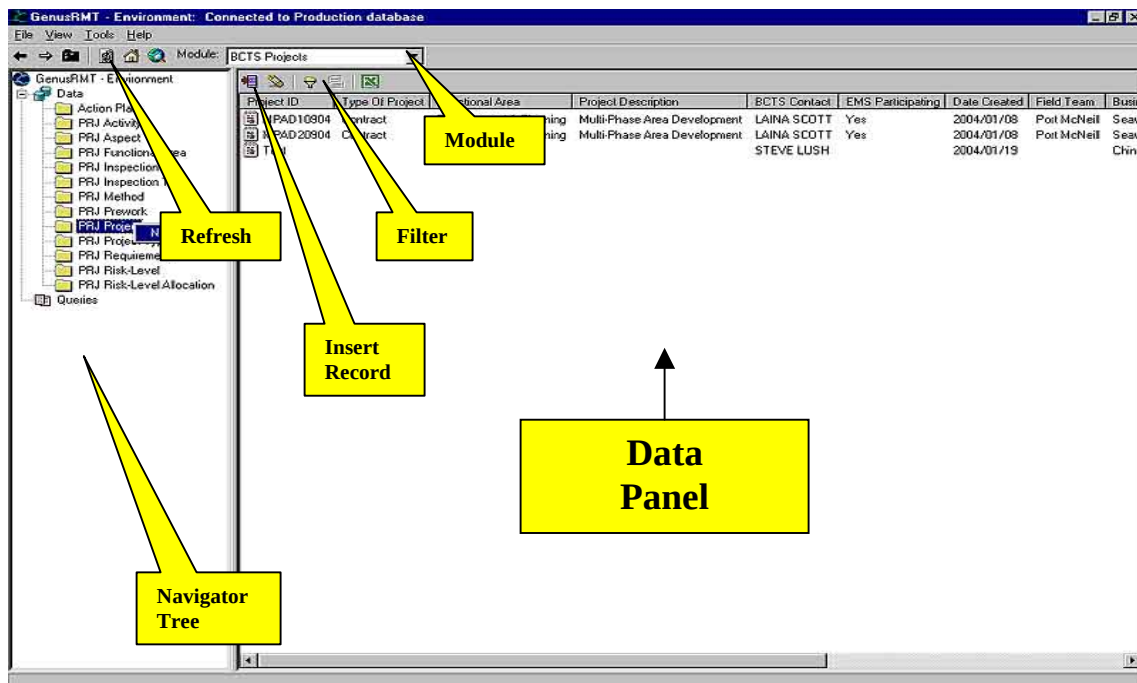
CREATING NEW PROJECT	2
EDIT/VIEW A PROJECT	6
CREATING NEW PREWORK	7
PREWORK ATTACHMENT.....	11
ACTION PLAN ATTACHMENT.....	12
EDIT/VIEW PREWORK	14
CREATING NEW ACTION PLAN	15
EDIT/VIEW ACTION PLAN	18
CREATING NEW INSPECTION	19
INSPECTION ATTACHMENT.....	23
EDIT/VIEW INSPECTION FORM	25
CREATING NEW ISSUES (ITS).....	26
CONFORMANCE ISSUE WIZARD – NEW WINDOW	28
COMPLIANCE ISSUE WIZARD – NEW WINDOW.....	31
NATURAL EVENT ISSUE WIZARD – NEW WINDOW	34
PUBLIC/CLIENT ISSUE WIZARD – NEW WINDOW	37
OTHERS ISSUE WIZARD – NEW WINDOW.....	40
EDIT/VIEW ISSUES (ITS).....	44
SET FILTER	46
APPENDIX A – SETTING A CONTRACTOR (=LPC) TO EMS APPROVED	47



Genus RMT (EMS)

CREATING NEW PROJECT

1. In Genus Environment Window
Select **BCTS Projects** from Module drop-down list
Expand **Data** directory in Navigator Tree and *click* on **PRJ Project** folder
 - A list of projects will display in **Data Panel**, *click* on **Filter** button and proceed to Step 2 in [SET FILTER](#) (p.46) section for instructions before continuing:
 - *Click* **Insert Record** icon
or *Right-Click* **PRJ Project** folder and select **New Project**
 - This will bring up **Project - New Window**



Note: Fields shaded in turquoise require data entry.

2. Project - New Window
Fill in the following fields:

Project Details

- Project ID – manually enter project (i.e. *TSL A12345*, *CS2004TCH00-001*)
- Date Created – default will be today's date or *click* on [...] to bring up calendar
- Project Description – max. 2000 characters
- BCTS Contact – select from drop-down list
- Project Duration – *click* on [...] to select duration

Note: To select month from calendar (drop-down list not always functional) *double-click* in month field and manually type in first letter of the desired month (i.e. *J 1x, 2x, 3x.. = January, June, July...*)
If date field is *clicked* more than twice, must exit date field box and click again to bring up calendar or manually enter date.



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Focus Area

- Business Area – select from drop-down list
- Field Team – select from drop-down list
- Type of Project – select from drop-down list
- General Location – enter brief description, max. 2000 characters
- License – click **Insert Record** to add licence/cutting permit (can have multiple licence)
 - Select licence from drop-down list
 - Select Cutting Permit from drop-down list

EMS Area

- Functional Area – select from drop-down list
- Activity – activity list will vary depending on the selected Functional Area

Licensee/Permittee/Contractor

- Click **Insert Record** and select company from drop-down list
- Note:** Refer to [APPENDIX A](#), for instructions to set Company to EMS Approval
- EMS Participating – select from drop-down list

Location Details

- Click **Add Roads/Structures/Blocks** button to bring up **Project Location Detail** Window

3. Project Location Details Window Roads/Structures

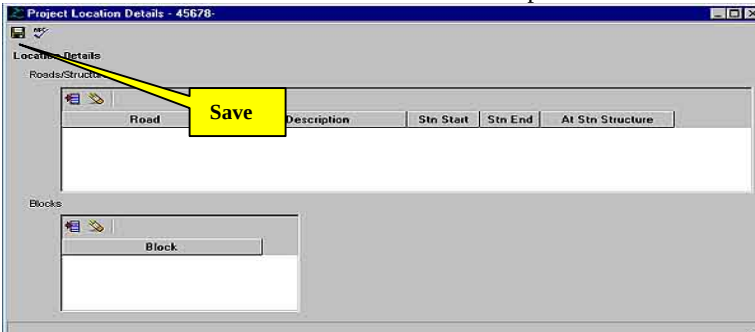
- Click **Insert Record** and fill in the following columns
 - Road – select from drop-down list
 - Description – max. 2000 characters
 - Sta. Start – manually enter Station
 - Sta. End – manually enter Station
 - At Stn Structure – select from drop-down list



Genus RMT (EMS)

Blocks

- Click **Insert Record** and select from drop-down list



- Click **Save** and close window

4. Project-New Window

- Ensure that Project information entered is correct and *click Save*.
- This will update and refresh projects in Genus Environment Window.

Note: To continue and create Pework for this project, *click Create New Pework...* button and proceed to Step 2 in [CREATING NEW PREWORK](#) (p.8) section. Otherwise to make attachments to this project, continue to [Step 5](#).

5. Genus Environment Window - Project Attachments

In Navigator Tree, *double-click PRJ Project* folder to expand and locate project

- *Double-click* on the desired project to display subfolders and select **Attachment** folder
- *Click Insert Record*
or *Right-click Attachment* folder and select **New Attachment** to bring up **Choose a file** window



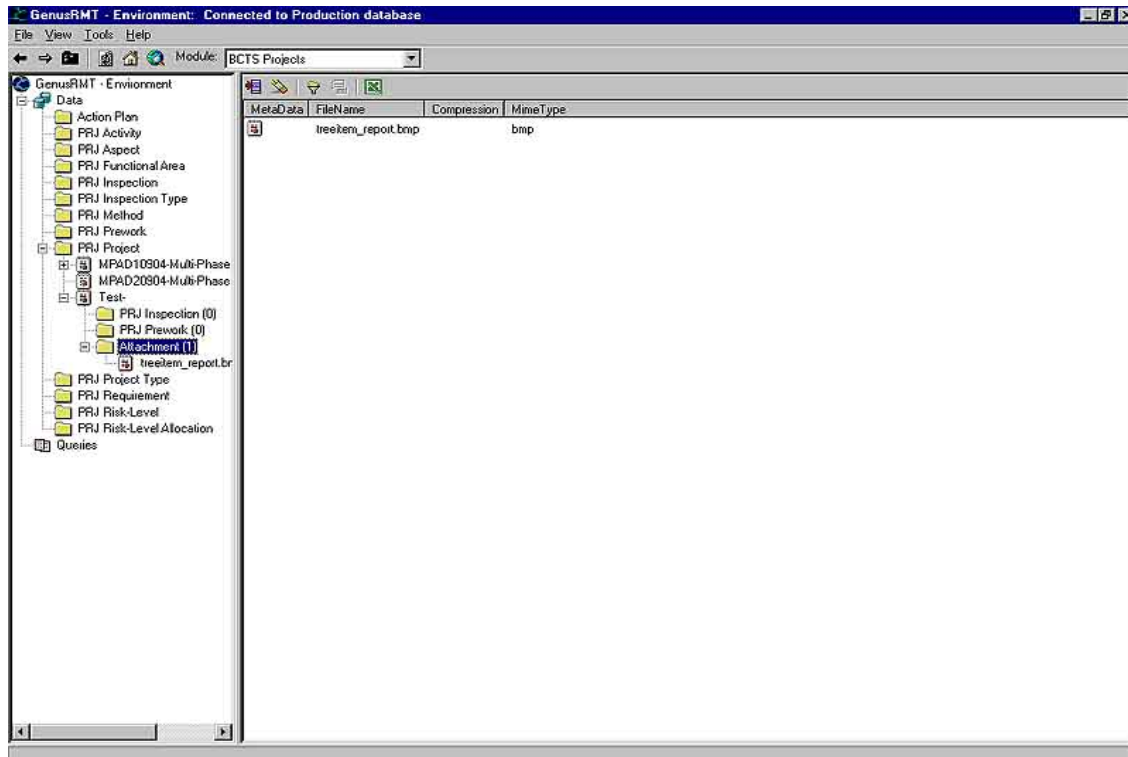
- Select file to attach and *click Open* button to save attachment
- This will update and refresh Genus Environment Window





Genus RMT (EMS)

Note: Attachment folder has a counter to display the number of attachments to the project. In order to open an attachment, the file can only be accessed from the **Data Panel**.



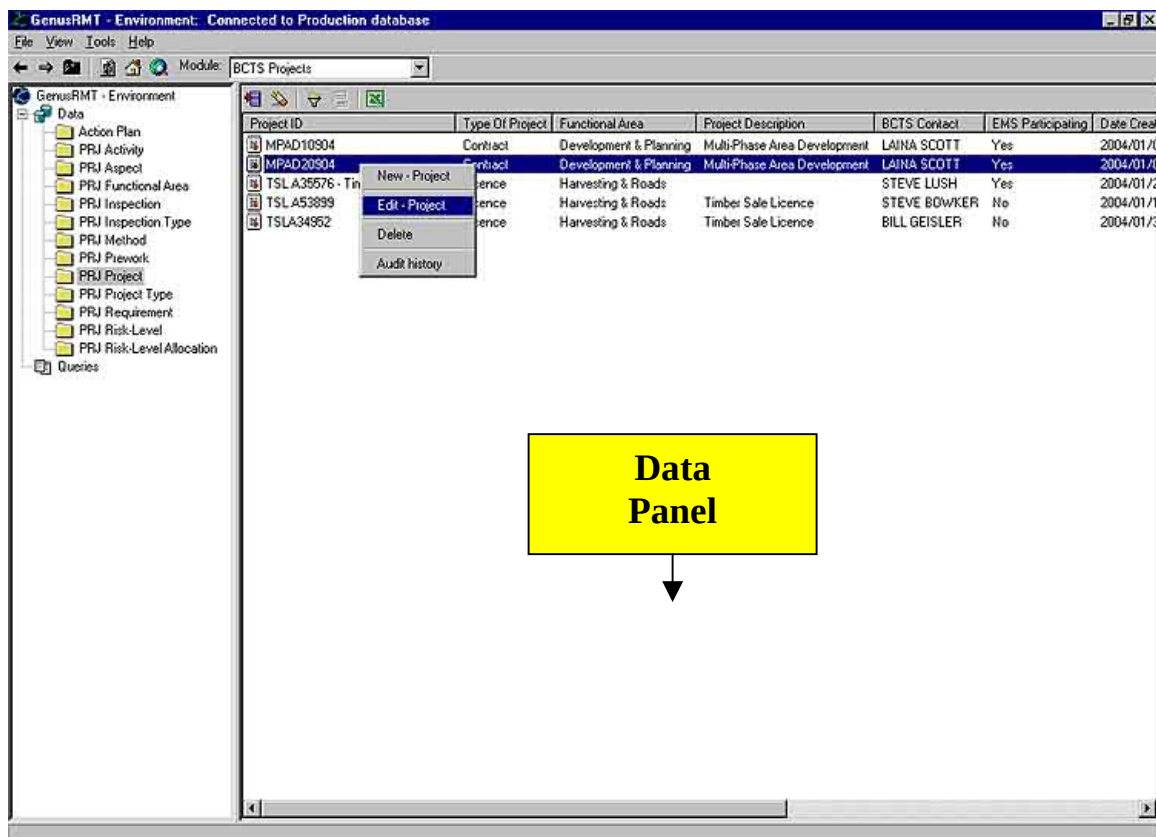
- Double-click on the file in data panel and user will be prompt a warning message
- Click **OK** to view the attachment
- To make additional attachments, repeat [Step 5](#).



Genus RMT (EMS)

EDIT/VIEW A PROJECT

1. In Genus Environment Window
Select **BCTS Projects** from module drop-down list
Expand **Data** directory in Navigator Tree and *click* on **PRJ Project** folder
 - A list of projects will display in **Data Panel**, *click* on **Filter** button and proceed to Step 2 in [SET FILTER](#) (p.46) section for instructions before continuing:
 - *Right-click* on appropriate record in the **Data Panel** and select **Edit Project**
or double-click on the project
 - This will open the **Project Window** for editing



2. Project Window
 - Make the appropriate changes to the project
 - *Click Save* to update and close window

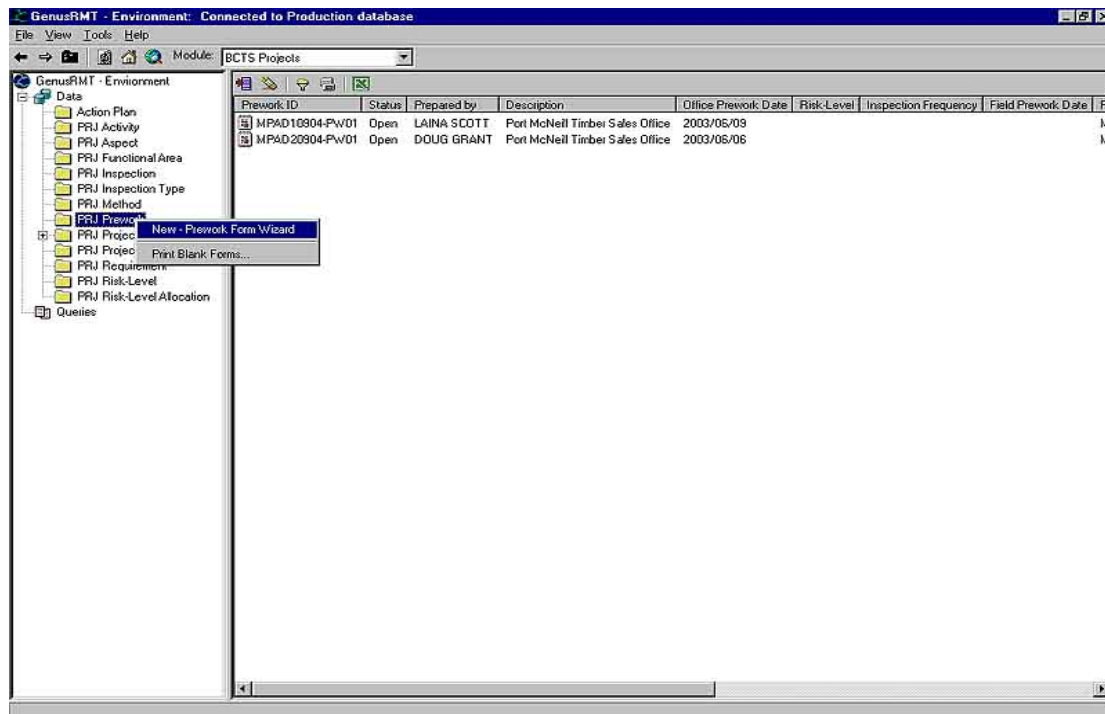
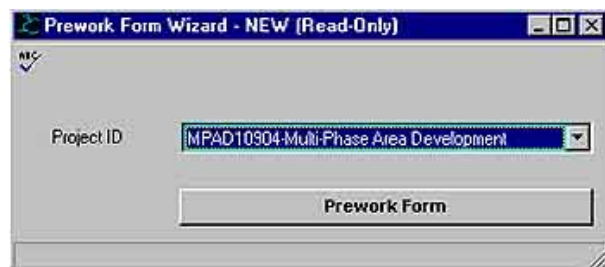


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CREATING NEW PREWORK

***NOTE:** Refer to appropriate CHECKLIST Form: EMS CHK-003/004/005 before proceeding to update requirements. <http://www.for.gov.bc.ca/bcts/tch/ems/forms/>

1. In Genus Environment Window
Select **BCTS Projects** from Module drop-down list
Expand **Data** directory in Navigator Tree and locate **PRJ Prework** folder
 - A list of projects will display in **Data Panel**, *click* on **Filter** button and proceed to Step 2 in [SET FILTER](#) (p.46) section for instructions before continuing;
 - *Click* **Insert Record** icon
or *Right-Click* **PRJ Prework** folder and select **New-Prework Form Wizard**
 - This will bring up **Prework Form Wizard** Window



- Select Project ID from drop-down list and *click* **Prework Form** Button
- This will bring up **Prework Form – New** Window



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Note: Fields shaded in turquoise require data entry.

2. Prewrite Form – New Window
Fill in the following fields:

Prewrite Details

- Prewrite ID – will be blank until initial save
- Prepared By – select from drop-down list
- Status – select from drop-down list
- Prewrite Location Desc. – max. 2000 characters
- Office Prewrite Date – *click on* [...] to bring up calendar and select date
- Field Prewrite Date – *click on* [...] to bring up calendar and select date
- Location Details - *Click Add Roads/Structures/Blocks* button to bring up **Location Detail** Window

Prewrite Form - NEW

Prewrite Details - Development & Planning

Project ID: MPAD20904-Multi-Phase Area Development

Prewrite ID:

Prepared By: (turquoise)

Status:

Prewrite Location Desc.:

Office Prewrite Date: (turquoise) Field Prewrite Date: (turquoise)

Location Details: Add Roads/Structures/Blocks...

Licence/Permittee/Contractor

Company: On-Site Contact:

Activity

Activity:

Stakeholder

Stakeholder: Notified?: Date:

Requirements

APN	ITS	Requirement	Status	APN	ITS	Memo
		DOCUMENTATION		0	0	
		SP, SMP		0	0	
		Road design		0	0	
		EOP's		0	0	
		EFP		0	0	
		Employee EMS Training Records (incl. regulatory)		0	0	

Risk Level

Risk-level: Inspection Frequency:

Comments

Attachments: 0

Create New Inspection Form...

Create New Inspection



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3. Project Location Details Window

Roads/Structures

- Click **Insert Record** and fill in the following columns
 - Road – select from drop-down list
 - Description – max. 2000 characters
 - Sta. Start – manually enter Station
 - Sta. End – manually enter Station
 - At Stn Structure – select from drop-down list

Blocks

- Click **Insert Record** and select from drop-down list

- Click **Save** and close window to go back to **Pework Form – New Window**

4. Pework Form – New Window

Licensee/Permitee/Contractor

- Click **Insert Record** and fill in the following columns

Note: Refer to [APPENDIX A](#) for instructions to set Company to EMS Approved

- Company – select from drop-down list
- Onsite Contact – enter contact person information

Activity

- Click **Insert Record** and select activity from drop-down list

Stakeholder

- Click **Insert Record** and fill in the following columns
 - Stakeholder – select from drop-down list
 - Notified – select whether if Stakeholder has been contacted
 - Date – click once to bring up Calendar and select date

Note: To select month from calendar (drop-down list not functional) *double-click* in month field and manually type in first letter of the desired month (i.e. **J** 1x, 2x, 3x.. = *January, June, July...*)
If date field is *clicked* more than twice, must exit date field box and click again to bring up calendar or manually enter date.

- Click **Save** to generate Pework ID and proceed to requirements



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Requirements

- For each **Data Line**, select and complete the following fields:
 - Status – select from drop-down list, when **NO** is selected, an **Action Plan** is required.
 - Memo – enter short comments here, otherwise use Comments field.
 - **Click Save**
- If **Action Plan** is required, ensure the appropriate row is selected. Then *click* on **APN** button to bring up **Requirement Action Plans Window** and proceed to [Step 5](#).
- If **ITS** is required, ensure the appropriate row is selected. Then *click* on **ITS** button to bring up **Requirement Issues Window** and proceed to Step 3 in [CREATING NEW ISSUES \(ITS\)](#) (p.27) section for instructions.
- Otherwise, Repeat for other data lines and proceed to [Step 6](#) to complete Prework Form.

Prework Form - 45678-PW01

Prework Details - Silviculture

Project ID: 45678-
Prework ID: 45678-PW01
Prepared By: STEVE LUSH
Status: Open

Prework Location Desc:
Office Prework Date: 2003/12/31
Field Prework Date: 2004/01/02

Licence/Permittee/Contractor

N & R: MANAGEMENT L
On-Site Contact:
Activity: Brushing

Stakeholder

Stakeholder	Notified?	Date
RANGE	Yes	2003/12/19

Requirements

Requirement	Status	APN	ITS	Memo
Contract and schedules	No	0	0	
Pesticide Use Permit		0	0	
Pesticide Service Licence Number		0	0	
Applicators Certificate		0	0	

Risk Level

Risk-level: Low
Inspector:
Comments:
Attachments: 0

Create New Inspection Form...

5. Requirement Action Plans Window

- Click Insert Record* and *click* on **APN** button to bring up **Action Plan Form Window** or manually fill in the columns.

Note: When requirement is manually filled in this will NOT e-mail recipient the action plan.

- Otherwise, proceed to Step 2 in [CREATING NEW ACTION PLAN](#) (p.16) section for instructions.

Requirement Action Plans Window - Contract and schedules

Requirement Details

Project ID: 45678-
Form ID: 45678-PW01
Requirement: Contract and schedules
Status: No

Action Plan(s)

Action Plan ID	APN Status	Assigned To	Target Date	Remind	Completion Date	Action	Business Area
	Open		7				Chinook



Genus RMT (EMS)

****Note:** Refer to **Project Risk Rating Form** before proceeding to complete Pework Form.

6. Pework Form Window
Fill in the following fields:

Risk Level

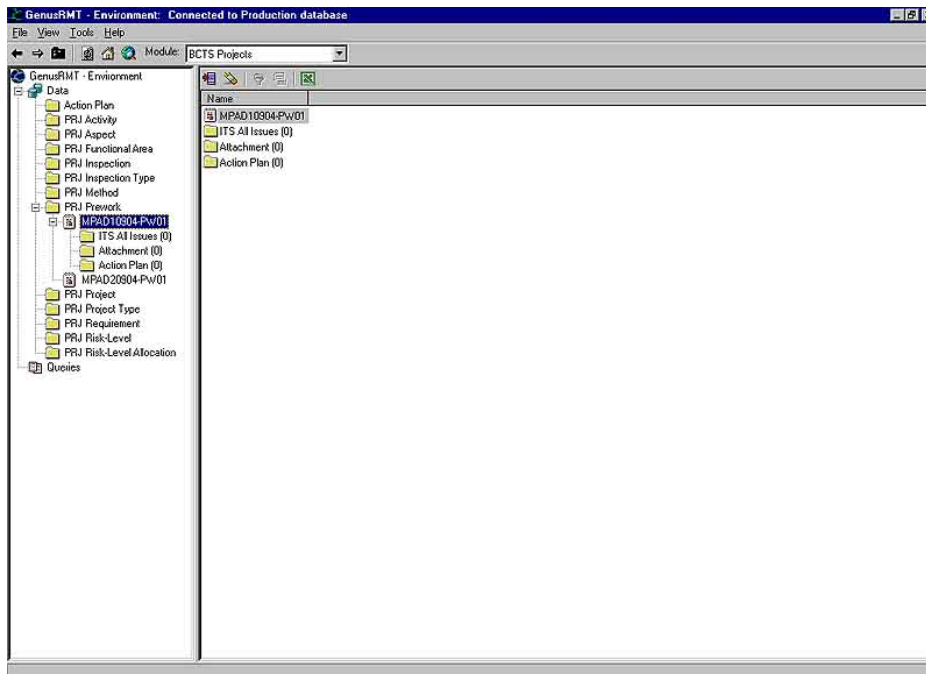
- Risk Level – select from drop-down list
- Inspection Frequency – manually enter frequency as recommended in Project Risk Rating Form

Comments

- Enter information of contacted person and additional comments, max 2000 characters
- Click **Save** and close window
- Click **Refresh** button in **Genus Environment** Window to verify forms have been updated

Note: To attach any file relevant to the Pework, proceed to [Step 7](#).

Note: To continue and create Inspection for this prework, click **Create New Inspection...** button and proceed to Step 2 in [CREATING NEW INSPECTION](#) (p.20) section. Otherwise to make attachments to this project, continue to [Step 7](#).



7. Genus Environment Window
PREWORK ATTACHMENT

Select **BCTS Projects** from Module drop-down list

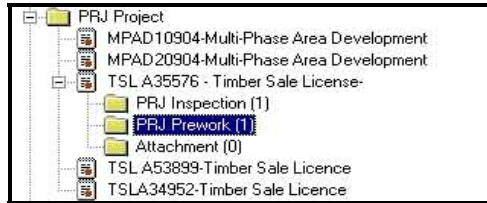
Expand **Data** directory in Navigator Tree and locate **PRJ Project** folder

- Double-click on **PRJ Project** folder to expand list of projects
- Double-click again on desired project to display subfolders
- Double-click on **PRJ Prework** subfolder to expand list of preworks

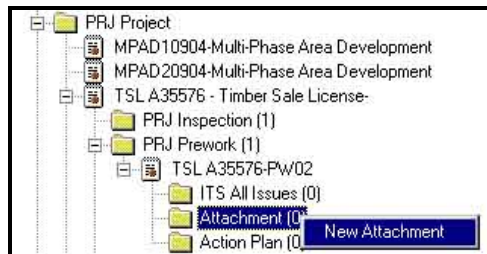
Note: Subfolders has counter to display number of records



Genus RMT (EMS)



- Double-click on desired prework to display subfolders
- Select **Attachment** folder and click **Insert Record**
or Right-click **Attachment** folder and select **New Attachment** to bring up **Choose a file** window



Alternatively:

- Locate created **Prework** in PRJ Prework Folder
- Double-click on the appropriate Prework Id to display subfolders and select **Attachment** folder
- Click **Insert Record**
or Right-click **Attachment** folder and select **New Attachment** to bring up **Choose a file** window



ACTION PLAN ATTACHMENT

Select **BCTS Projects** from Module drop-down list

Expand **Data** directory in Navigator Tree and locate **PRJ Project** folder

- Double-click on **PRJ Project** folder to expand list of projects
- Double-click on desired project to display subfolders
- Double-click again on **PRJ Prework** subfolder to expand list of preworks



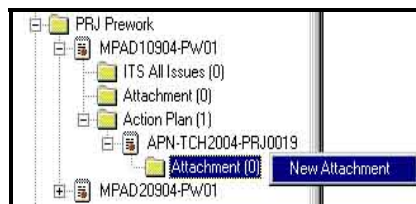


Genus RMT (EMS)

- *Double-click* on desired prework to display subfolders
- *Double-click* again on **Action Plan** folder to expand list of action plans
- *Double-click* on desired Action plan to display **Attachment** folder
Note: Subfolders has counter to display number of records
- *Click* **Insert Record**
or *Right-click* **Attachment** folder and select **New Attachment** to bring up **Choose a file** window

Alternatively:

- Locate appropriate Action Plan ID within **Action Plan** folder
- *Double-click* on the appropriate Action Plan Id to display and select **Attachment** folder
- *Click* **Insert Record**
or *Right-click* **Attachment** folder and select **New Attachment** to bring up **Choose a file** window



- Select file to attach and *click* **Open** button to save attachment
- This will update and refresh Genus Environment Window



Note: Attachment folder has a counter to display the number of attachments to the prework. In order to open an attachment, the file can only be accessed from the **Data Panel**.

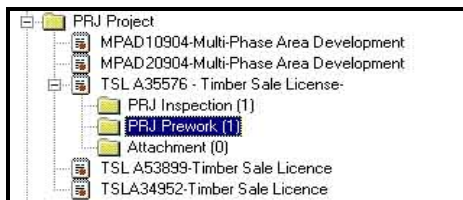


Genus RMT (EMS)

EDIT/VIEW PREWORK

1. In Genus Environment Window
Select **BCTS Projects** from Module drop-down list
Expand **Data** directory in Navigator Tree and locate **PRJ Project** folder
 - A list of projects will display in **Data Panel**, *click* on **Filter** button and proceed to Step 2 in [SET FILTER](#) (p.46) section for instructions before continuing:
 - *Double-click* on PRJ Project folder to expand list of projects
 - *Double-click* again on desired project to display subfolders
 - *Click* on **PRJ Prework** subfolder to display list of prework in **Data Panel**

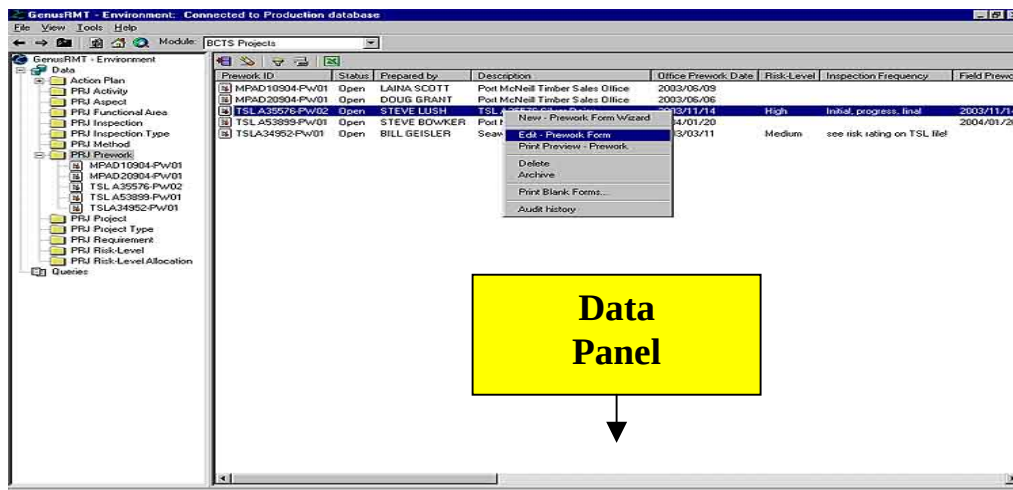
Note: Subfolders has counter to display number of records



- *Right-click* on desired prework from **Data Panel** and select **Edit Prework Form**
- This will open the **Prework Form Window** for editing

Alternatively

- Expand **Data** directory in Navigator Tree and locate **PRJ Prework** folder
- *Double-click* on **PRJ Prework** folder to display a list of existing prework in the **Data Panel**
- *Right-click* on appropriate record in the **Data Panel** and select **Edit Prework Form**
- This will open the **Prework Form Window** for editing



2. Prework Form Window
 - Make the appropriate changes to prework form
 - Click Save to update and close window

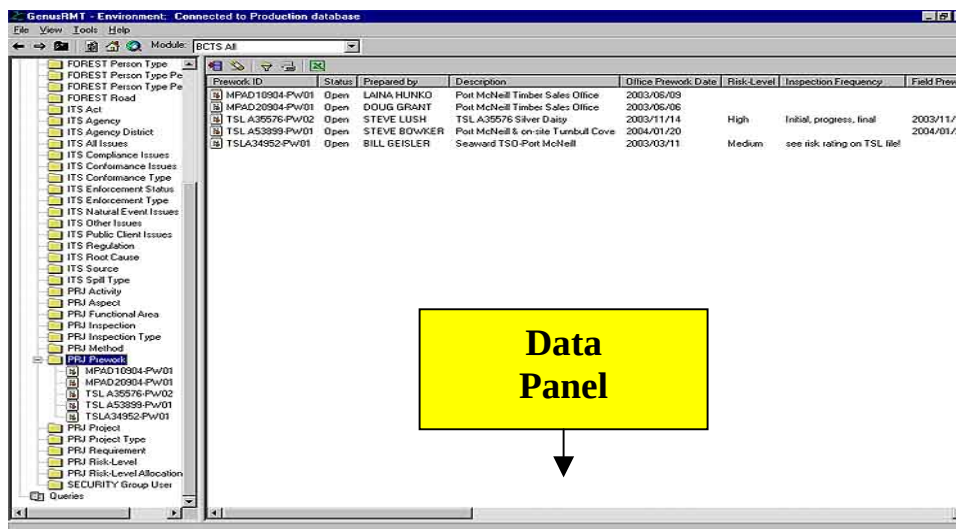


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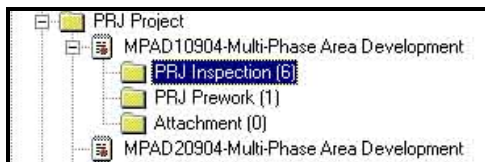
CREATING NEW ACTION PLAN

NOTE: You must go through a specific **PRJ Project** pre-work/inspection or ITS to have a module link to a project.

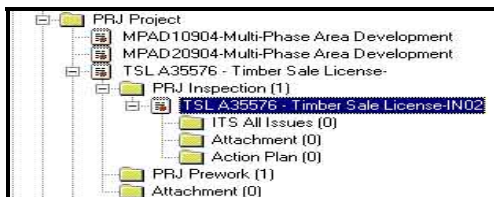
1. In Genus Environment Window
Select **BCTS Projects** from Module drop-down list
Expand **Data** directory in Navigator Tree and locate **PRJ Project** folder
 - A list of projects will display in **Data Panel**, *click* on **Filter** button and proceed to Step 2 in [SET FILTER](#) (p.46) section for instructions before continuing:



- **Double-click** on **PRJ Project** folder to expand list of projects
- **Double-click** again on desired project to display subfolders



- **Click** on **PRJ Prework** or **PRJ Inspection** subfolder to expand list of records
- **Double-click** on desired record to display subfolders and display record in **Data Panel**



- **Right-click** on desired record from **Data Panel** and select **Edit - Prework or Inspection Form**
- This will open the **Prework or Inspection Form** Window for editing



BCTS
BC Timber Sales
Chinook

'GENUS' Standard Operating Procedure 04/05/04

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2. Prewrite or Inspection Form Window
 - Select **Requirement** and click on **APN** button
 - This will bring up **Action Plan Form** Window
 - Proceed to [Step 3](#).

Alternatively:

Select **BCTS All** from Module drop-down list

Expand **Data** directory in Navigator Tree and locate appropriate folder to create action plan

Folders:

PRJ Prewrite

- *Double-click* on **PRJ Prewrite** folder to display prework records in **Data Panel**
- *Double-click* on the appropriate record in **Data Panel**
- This will open **Prewrite – Form** Window
 - Select **Requirement** and click on **APN** button and proceed to [Step 3](#).

PRJ Inspection

- *Double-click* on **PRJ Inspection** folder to display inspection records in **Data Panel**
- *Double-click* on the appropriate record in **Data Panel**
- This will open **Inspection – Form** Window
 - Select **Requirement** and click on **APN** button and proceed to [Step 3](#).

ITS (Conformance, Compliance, Natural Disaster, Public Client, Other)

- *Double-click* on appropriate folder to display records in **Data Panel**
- *Double-click* on the appropriate issue record in **Data Panel**
- This will open specific **Issue** Window
 - Click **Insert Record** in **Action Plan(s)** section
 - Click on **APN** button and proceed to [Step 3](#).

3. Action Plan Form Window
Fill in the following fields:

Action Plan Details

- Business Area – accept default area or select from drop-down list
- APN Status – select from drop-down list
- Assigned To – select from drop-down list
- Target Date – *click* on [...] to bring up calendar and select date
- Completion Date – optional, *click* on [...] to bring up calendar and select date
- Reminder – select days from drop-down list

Action

- Type action information, max. 2000 characters



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- Click **Save** to generate Action Plan ID and close **Action Plan Form** Window

Note: When working from Prework/Inspection/Issue Forms, verify information in **Requirement Action Plans** Window has been updated and close window

Action Plan ID	APN Status	Assigned To	Target Date	Remind	Completion Date	Action	Business Area
APN-TCH2004-PRJ0024	Open	STEVE LUSH	2003/02/08			Test data	Chinook

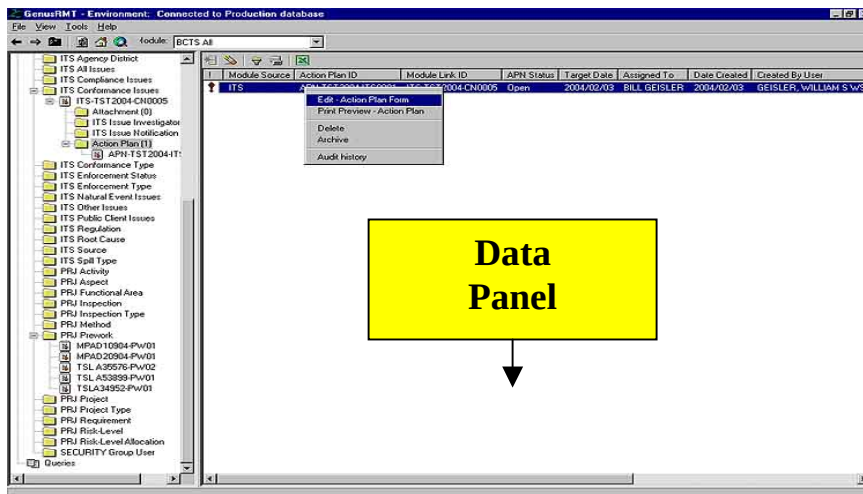
Click on link to proceed back to: [PREWORK-New](#) (p.10), [INSPECTION-New](#) (p.21), [CONFORMANCE ISSUE](#) (p.30), [COMPLIANCE ISSUE](#) (p.33), [NATURAL EVENT ISSUE](#) (p.37), [PUBLIC/CLIENT ISSUE](#) (p.40), [OTHER ISSUE](#) (p.43)



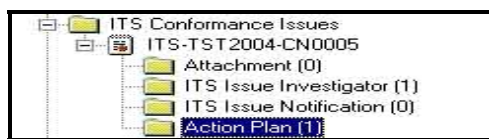
Genus RMT (EMS)

EDIT/VIEW ACTION PLAN

1. In Genus Environment Window
Select **BCTS All** from Module drop-down list
Expand **Data** directory in Navigator Tree and locate **PRJ Project** folder
 - A list of projects will display in **Data Panel**, *click* on **Filter** button and proceed to Step 2 in [SET FILTER](#) (p.46) section for instructions before continuing:



- Double-click folder to expand a list of projects
 - Double-click again on desired project to display subfolders
 - Click on **Action Plan** folder to display list of action plans in **Data Panel**
- Note:** Subfolder has counter to display number of records



- Right-click on desired action plan from **Data Panel** and select **Edit – Action Plan Form**
- This will open the **Action Plan Form** Window for editing

Alternatively

- Select **BCTS All** from Module drop-down list
- Expand **Data** directory in Navigator Tree and locate **Action Plan** folder
- Double-click on **Action Plan** folder to display a list of existing action plans in the **Data Panel**
- Right-click on desired record in the **Data Panel** and select **Edit – Action Plan Form**
- This will open the **Action Form Window** for editing

2. Action Plan Form Window

- Make the appropriate changes to action plan
- **Note:** To set APN Status to **Closed** must enter in completion date
- Click **Save** to update and close window



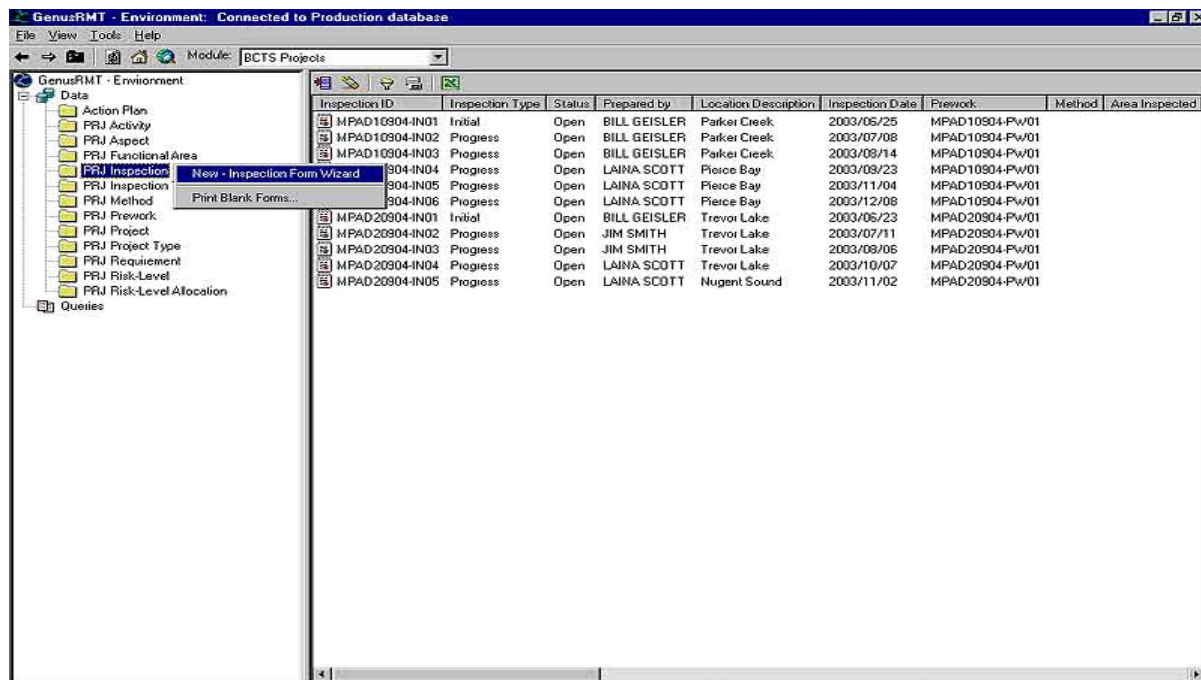
Genus RMT (EMS)

CREATING NEW INSPECTION

***NOTE:** Refer to appropriate INSPECTION REPORT Form: EMS CHK-001/006/007 and EMS Conformance Checklist, Form: EMS CHK 013 before proceeding to update requirements.

<http://www.for.gov.bc.ca/bcts/tch/ems/forms/>

1. In Genus Environment Window
Select **BCTS Projects** from Module drop-down list
Expand **Data** directory in Navigator Tree and locate **PRJ Inspection** folder
 - Click **Insert Record** icon
or **Right-Click PRJ Inspection** folder and select **New-Inspection Form Wizard**
 - This will bring up **Inspection Form Wizard** Window



- Select Project ID and Pework ID from drop-down lists and **click Inspection Form** Button
- This will bring up **Inspection Form – New** Window



Genus RMT (EMS)

NOTE: Fields shaded in turquoise require data entry.

2. Inspection Form – New Window

Fill in the following fields:

Inspection Details

- Inspection ID – will be blank until initial save
- Prepared By – select from drop-down list
- Status – select from drop-down list
- Area Inspected – fill in specific area (*i.e. Big Tree Road*)
- Location Description – max. 2000 characters (*i.e. Hunter Creek*)
- Inspection Date – click on [...] to bring up calendar and select date
Note: To select month from calendar (drop-down list not functional) *double-click* in month field and manually type in first letter of the desired month (*i.e. J 1x, 2x, 3x.. = January, June, July..*)
If date field is *clicked* more than twice, must exit date field box and click again to bring up calendar or manually enter date.
- Method – select from drop-down list
- Status of Operations – *i.e. 50% complete*
- Type – select from drop-down list
- Location Details - Click **Add Roads/Structures/Blocks** button to bring up **Location Detail** Window

Inspection Form - NEW

Inspection Details - Silviculture

Project ID: 45678

Inspection ID:

Prepared By:

Status:

Area Inspected:

Location Description:

Inspection Date:

Method:

Status of Operations:

Type:

Location Details:

Add Roads/Structures/Blocks...

Licencee/Permittee/Contractor

Company:

On-Site Contact:

Requirements

APN	ITS	Status	APN	ITS	Memo
Contract Requirements Met		0	0		
Conformance to SP, SMP		0	0		
Sediment control		0	0		
Road / trail use (restrictions, etc.)		0	0		
External / Internal boundaries marked, adhered to		0	0		
Riparian management (debris, crossings, MFZs etc.)		0	0		

Comments

Attachments 0

Memo Fields (For Short comments only)

Comments Section (Reference REQUIREMENTS and EMS #)



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3. Project Location Details Window

Roads/Structures

- Click **Insert Record** and fill in the following columns
 - Road – select from drop-down list
 - Description – max. 2000 characters
 - Sta. Start – manually enter Station
 - Sta. End – manually enter Station
 - At Stn Structure – select from drop-down list

Blocks

- Click **Insert Record** and select from drop-down list

- Click **Save** and close window to go back to **Inspection Form – New Window**

4. Inspection Form – New Window

Licensee/Permitee/Contractor

- Click **Insert Record** and fill in the following columns
- Note:** Refer to [APPENDIX A](#), for instructions to set Company to EMS Approval
 - Company – select from drop-down list
 - Onsite Contact – manually enter contact person information

Activity

- Click **Insert Record** and select activity from drop-down list
- Click **Save** to generate Inspection ID and proceed to requirements

Requirements

Note: For easier viewing, **Memo** field is to be used for short comments only. For more descriptive comments, enter into **Comments** section with subheadings (**REQUIREMENTS** and **EMS**) referencing to number.

- Select **Data Line** and complete the following fields in Requirements data line:
 - Status – select from drop-down list, when NO is selected, Action Plan is required.
 - Memo – enter **short** comments only
 - Click **Save**
- If **Action Plan** is required, ensure the appropriate row is selected. Then click on **APN** button to bring up **Requirement Action Plans Window** and proceed to [Steps 5](#).
- If **ITS** is required, ensure the appropriate row is selected. Then click on **ITS** button to bring up **Requirement Issues Window** and proceed to Step 3 in [CREATING NEW ISSUES \(ITS\)](#) (p.26) section for instructions



Genus RMT (EMS)

- Otherwise, **Repeat** for other data lines and proceed to complete Inspection Form [Step 6](#).
5. Requirement Action Plans Window
- Click **Insert Record** and click on **APN** button to bring up **Action Plan Form** Window or manually fill in the columns.
- Note:** When requirement is manually filled in this will NOT e-mail recipient the action plan.
- Otherwise, proceed to Step 3 in [CREATING NEW ACTION PLAN](#) (p.16) section for instructions.

The screenshot shows a window titled "Requirement Action Plans Window - SP, SMP". It contains a "Requirement Details" section with the following information:

- Project ID: MPAD20904-Multi-Phase Area Development
- Form ID: MPAD20904-PW02
- Requirement: SP, SMP
- Status: Yes

Below this is an "Action Plan(s)" section with a table:

Action Plan ID	APN Status	Assigned To	Target Date	Remind	Completion Date	Action	Business Area
APN-TCH2004-FR0024	Open	STEVE LUSH	2003/02/08			Test data	Chinook

6. Inspection Form – New Window
- Fill in the following fields:

Comments

- Enter information of contacted person and additional comments, max. 2000 characters
 - Click **Save** and close window
 - Click **Refresh** button in **Genus Environment** Window to verify forms have been updated
- Note:** To attach any relevant files to Inspection, proceed to [Step 7](#).

The screenshot shows the "GenusRMT - Environment" window, which is connected to a production database. It features a tree view on the left and a list view on the right.

Tree View (Left):

- GenusRMT - Environment
 - Data
 - Action Plan
 - PRU Activity
 - PRU Aspect
 - PRU Functional Area
 - PRU Inspection
 - MPAD10904-IN01
 - MPAD10904-IN02
 - MPAD10904-IN03
 - MPAD10904-IN04
 - MPAD10904-IN05
 - MPAD10904-IN06
 - MPAD20904-IN01
 - MPAD20904-IN02
 - MPAD20904-IN03
 - MPAD20904-IN04
 - MPAD20904-IN05
 - PRU Inspection Type
 - PRU Method
 - PRU Phorwork
 - PRU Project
 - PRU Project Type
 - PRU Requirement
 - PRU Risk-Level
 - PRU Risk-Level Allocation
 - Queries

List View (Right):

Name
MPAD10904-IN01
JITS All Issues (0)
Attachment (0)
Action Plan (0)



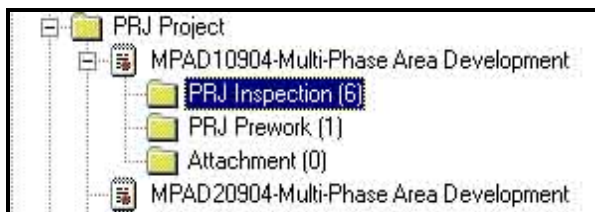
Genus RMT (EMS)

7. Genus Environment Window INSPECTION ATTACHMENT

Select **BCTS Projects** from Module drop-down list

Expand **Data** directory in Navigator Tree and locate **PRJ Project** folder

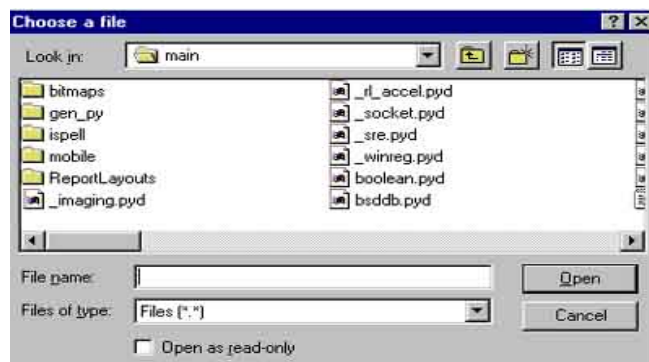
- Double-click on **PRJ Project** folder to expand list of projects
- Double-click again on desired project to display subfolders



- Click on **PRJ Inspection** subfolder to expand list of records
- Double-click desired inspection record to display subfolders



- Right-click **Attachment** folder and select **New Attachment** to bring up **Choose a file** window
- Select file to attach and click **Open** button to save attachment
- This will update and refresh Genus Environment Window



Note: Attachment folder has a counter to display the number of attachments to the specific inspection. In order to open an attachment, the file can only be accessed from the **Data Panel**.



Genus RMT (EMS)

Alternatively:

- Locate created **Inspection** in PRJ Inspection Folder
- *Double-click* on the appropriate Inspection Id to display subfolders and select **Attachment** folder
- *Click Insert Record*
or *Right-click Attachment* folder and select **New Attachment** to bring up **Choose a file** window



- Select file to attach and *click Open* button to save attachment
- This will update and refresh Genus Environment Window



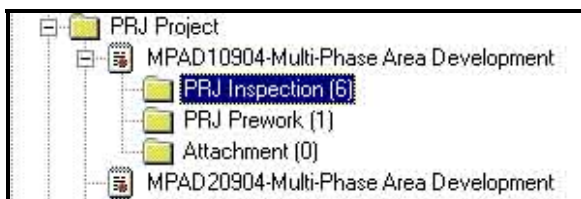
Note: Attachment folder has a counter to display the number of attachments to the specific inspection. In order to open an attachment, the file can only be accessed from the **Data Panel**.



Genus RMT (EMS)

EDIT/VIEW INSPECTION FORM

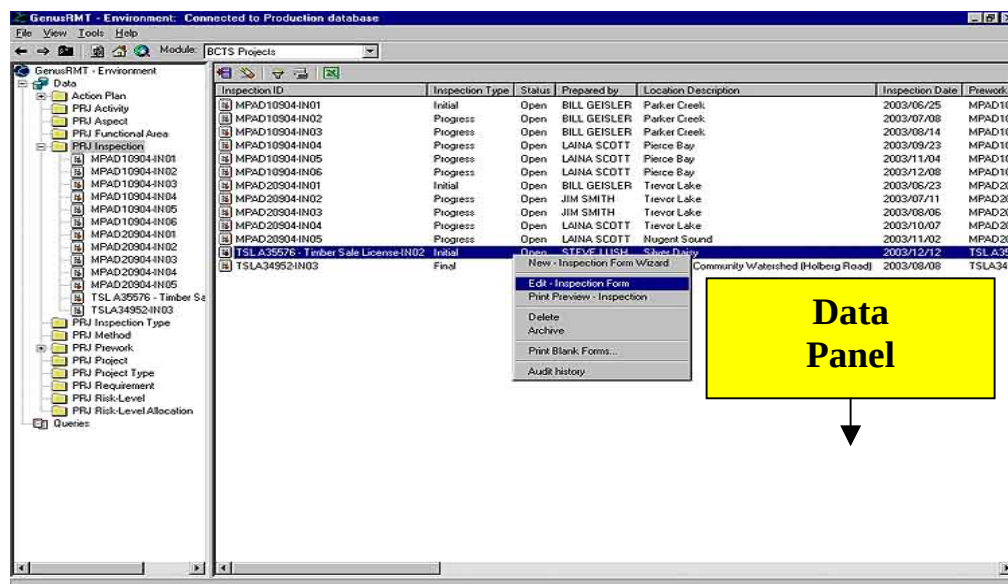
1. In Genus Environment Window
Select **BCTS Projects** from Module drop-down list
Expand **Data** directory in Navigator Tree and locate **PRJ Project** folder
 - Double-click on **PRJ Project** folder to expand list of projects
 - Double-click again on desired project to display subfolders
 - Click on **PRJ Inspection** subfolder to display list of inspections in **Data Panel***Note: Subfolders has counter to display number of records*



- Right-click on desired Inspection from **Data Panel** and select **Edit - Inspection Form**
- This will open the **Inspection Form** Window for editing

Alternatively

- Double-click **Data** directory in Navigator Tree and locate **PRJ Inspection** folder
- Click on **PRJ Inspection** folder to display a list of existing inspections in the **Data Panel**
- Right-click on desired record in the **Data Panel** and select **Edit - Inspection Form**
- This will open the **Inspection Form** Window for editing



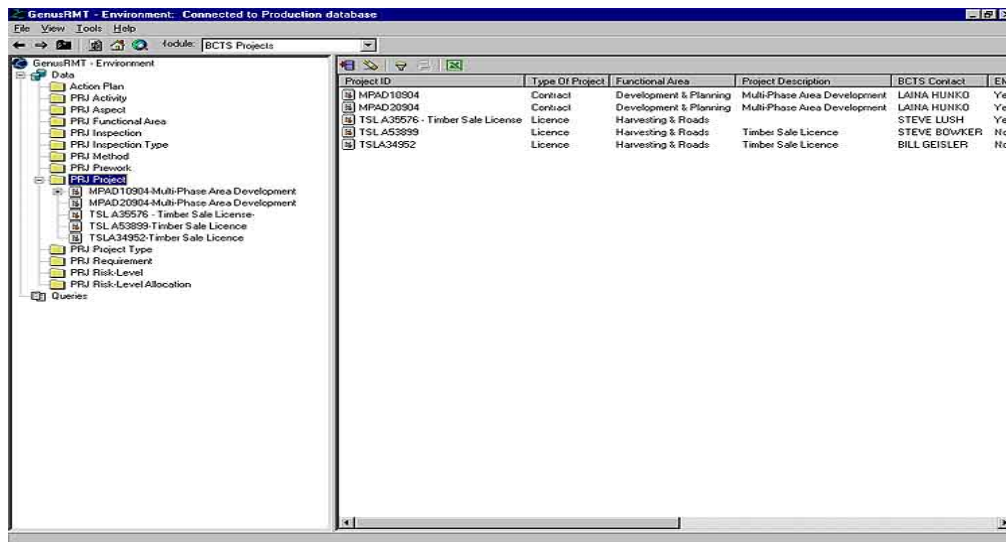
2. Inspection Form Window
 - Make the appropriate changes to inspection form
 - Click **Save** to update and close window



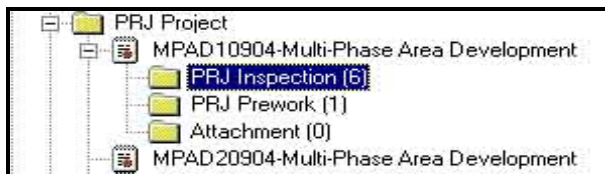
Genus RMT (EMS)

CREATING NEW ISSUES (ITS)

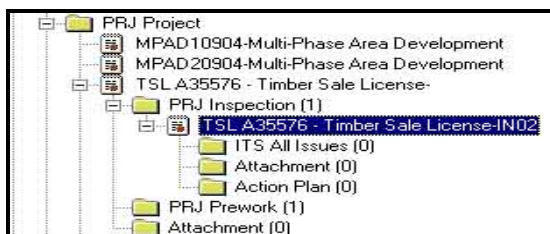
1. In Genus Environment Window
Select **BCTS All** from Module drop-down list
Expand **Data** directory in Navigator Tree and locate **PRJ Project** folder
 - A list of projects will display in **Data Panel**, *click* on **Filter** button and proceed to Step 2 in [SET FILTER](#) (p.46) section for instructions before continuing:



- Double-click on **PRJ Project** folder to expand list of projects
- Double-click again on desired project to display subfolders



- Click on **PRJ Prework** or **PRJ Inspection** subfolder to expand list of records
- Double-click on desired record to display subfolders and display record in **Data Panel**



- Right-click on desired record from **Data Panel** and select **Edit – Prework/Inspection Form**
- This will open the **Prework/Inspection Form** Window for editing



Genus RMT (EMS)

2. Prewrite/Inspection Form Window
 - Select **Requirement** and click on **ITS** button
 - This will bring up **Requirement Issues** Window
3. Requirement Issues Window

- Click **Insert Record**
- This will open **Issue Wizard** Window

- Select Issue Type from drop-down lists and click **Next...** Button
- This will bring up appropriate **Issue Wizard – New** Window

Click on link to proceed: [CONFORMANCE](#) (p.28), [COMPLIANCE](#) (p.31), [NATURAL EVENT](#) (p.34),
[PUBLIC/CLIENT](#) (p.37), [OTHER](#) (p.40)



Genus RMT (EMS)

NOTE: Fields shaded in turquoise are required data entry before Issue can be saved. Refer to the appropriate Issue section to proceed:

CONFORMANCE ISSUE WIZARD – New Window

Fill in the following fields:

Report Information

- Issue Type – accept default
- Is this a spill? – select from drop-down list
- Issue Description – *click* on button to bring up Issue Description Window – max.2000 characters and click to save and close window. **If** more space required, must create a word document and add as attachment.
- Issue Status – select open
Note: Status cannot be set to closed until all associated actions are closed and once set to closed, the form is saved, locked and no additional changes can be made.
- Issue Source – select from drop-down list
- Issue Source Contact – enter name of person associated with the issue
- Occurrence Date – *click* on to bring up calendar and select date



Genus RMT (EMS)

Company Information

- Business Area – select from drop-down list
 - Field Team – select from drop-down list
 - Functional Area – select from drop-down list
 - Activity – will vary depending on functional area, select from drop-down list
 - Issue Owner – select from drop-down list and e-mail will be sent to the assigned person
 - Company – select from drop-down list
 - General Location – enter brief description of the location relevant to the issue
 - Investigated By – select from drop-down list
 - Location Details – ensure that all turquoise fields are filled prior to clicking on **Add Location** button. This will bring up **Issue Location Details** Window
- Fill in the following fields:

Location Details

- Licence – select licence number from drop-down list
- Road/Structure - *click **Insert Record*** and fill in the following columns
 - Road – select from drop-down list
 - Description – max. 2000 characters
 - Sta. Start – manually enter Station
 - Sta. End – manually enter Station
 - At Stn Structure – select from drop-down list
- Block - *click **Insert Record*** and select from drop-down list

Road	Description	Stn Start	Stn End	At Stn Structure

- *Click **Save** and close window to go back to **Conformance Issue Wizard – New Window***

Investigation Information

- Contributing Factors – enter a brief description, max. 2000 characters
- Type of Root Cause – select from drop-down list
- Root Cause Description – enter a brief description, max. 2000 characters
- Comments/Recommendations
- Corrective/Preventative Actions – enter a brief description, max 2000 characters
- Investigated By – select from drop-down list, if additional required, *click **Insert Record*** and select from drop-down list, repeat if necessary



Genus RMT (EMS)

Conformance Information

- Code – select from drop-down list
- Aspect – select from drop-down list, if additional required, *click Insert Record* and select drop-down list, repeat if necessary

Action Plan(s)

- Click **Insert Record** and click on **APN** button to bring up **Action Plan Form** Window or manually fill in the columns.

Note: When requirement is manually filled in this will NOT e-mail recipient the action plan

- Otherwise, proceed to Step 3 in [CREATING NEW ACTION PLAN](#) (p.16) section for instructions.

E-mail

- Click on **E-mail others with Issue details...** button to bring up **Issue E-mail Notification** Window
- Click **Insert Record** and select recipient name from drop-down list
- Click **Email Now** button to send Issue details to recipient

Recipient(s)	Notify Date
AMY BEETHAM	2004/01/19
ANGELA BONO	
BARB ORENNAN	
BILL GEISLER	
BILLY HOSKIN	
BRENDA DRUMMOND	
BRIAN T QUINN	
DARRELL LISSELL	
DEBBIE RIEHL	
DEIDRE HAIGHT	
DON HUDSON	
DOUG GRANT	
DUNCAN TAGGART	
GLENN PIGGOT	

Issue Attachments

- Proceed to [Step 4](#) for instructions

Click on link to proceed back to: [PREWORK-New](#) (p.10), [INSPECTION-New](#) (p.21)



Genus RMT (EMS)

COMPLIANCE ISSUE WIZARD – New Window

Fill in the following fields:

Report Information

- Issue Type – accept default
- Is this a spill? – select from drop-down list
- Issue Description – *click* on button to bring up Issue Description Window – max.2000 characters and click to save and close window. **If** more space required, must create a word document and add as attachment
- Issue Status – select from drop-down list
- Issue Source – select from drop-down list
- Issue Source Contact - enter name of person associated with the issue
- Occurrence Date – *click* on to bring up calendar and select date



Genus RMT (EMS)

Company Information

- Business Area – select from drop-down list
 - Field Team – select from drop-down list
 - Functional Area – select from drop-down list
 - Activity – will vary depending on functional area, select from drop-down list
 - Issue Owner – select from drop-down list and e-mail will be sent to the assigned person
 - Company – select from drop-down list
 - General Location – enter brief description of the location relevant to the issue
 - Investigated By – select from drop-down list
 - Location Details – ensure that all turquoise fields are filled prior to clicking on **Add Location** button. This will bring up **Issue Location Details** Window
- Fill in the following fields:

Location Details

- Licence – select licence number from drop-down list
- Road/Structure - *click **Insert Record*** and fill in the following columns
 - Road – select from drop-down list
 - Description – max. 2000 characters
 - Sta. Start – manually enter Station
 - Sta. End – manually enter Station
 - At Stn Structure – select from drop-down list
- Block - *click **Insert Record*** and select from drop-down list

Road	Description	Stn Start	Stn End	At Stn Structure

- *Click **Save*** and close window to go back to **Compliance Issue Wizard – New Window**

Investigation Information

- Impact Description – enter brief description, max. 2000 characters
- Action Taken – enter brief description, max. 2000 characters
- Contributing Factors – enter brief description, max. 2000 characters
- Type of Root Cause – select from drop-down list
- Root Cause Description – enter a brief description, max. 2000 characters
- Comments/Recommendations
- Corrective/Preventative Actions – enter a brief description, max 2000 characters
- Investigated By – select from drop-down list, if additional required, *click **Insert Record*** and select from drop-down list, repeat if necessary



Genus RMT (EMS)

Aspect

- Select from drop-down list
- For additional aspects – *click* Insert Record and select from drop-down list

Agency Information

- *Click* Insert Record and fill in the following columns:
 - Agency – select from drop-down list
 - Reported Date – select from calendar
 - Agency Incident # - enter incident number
 - Location – select from drop-down list
 - Contact – enter description of contact person

Legislation and Enforcement

- *Click* Insert Record and fill in the following columns:
 - Status – select from drop-down list
 - Act – select from drop-down list
 - Act Section – enter information
 - Regulation – select from drop-down list
 - Regulation Section – manually enter information
 - Determination Date – click to open calendar and select date
 - Enforcement – enter information
 - Penalty (\$) – enter \$ amount

Action Plan(s)

- *Click* **Insert Record** and *click* on **APN** button to bring up **Action Plan Form** Window **or** manually fill in the columns.

Note: When requirement is manually filled in this will NOT e-mail recipient the action plan

- Otherwise, proceed to Step 3 in [CREATING NEW ACTION PLAN](#) (p.16) section for instructions.

E-mail

- *Click* on **E-mail others with Issue details...** button to bring up **Issue E-mail Notification** Window
- *Click* **Insert Record** and select recipient name from drop-down list
- *Click* **Email Now** button to send Issue details to recipient

Issue Attachments

- Proceed to [Step 4](#) for instructions

Click on link to proceed back to: [PREWORK-New](#) (p.10), [INSPECTION-New](#) (p.21)



Genus RMT (EMS)

NATURAL EVENT ISSUE WIZARD – New Window

Fill in the following fields:

Report Information

- Issue Type – accept default
- Is this a spill? – select from drop-down list
- Issue Description – *click* on button to bring up Issue Description Window – max.2000 characters and click ☒ to save and close window. **If** more space required, must create a word document and add as attachment
- Issue Status – select from drop-down list
- Issue Source – select from drop-down list
- Issue Source Contact - enter name of person associated with the issue
- Occurrence Date – *click* on to bring up calendar and select date

Natural Event Issue Wizard - NEW

Report Information

Issue ID: Issue Status:
Module Link ID: Entered By: TSE,ALAN ALTSE Date Entered: 2004/01/19
Issue Type: Issue Source: Occurrence Date:
Is this a spill?: Issue Source Contact:
Issue Description: [Add Issue Description... \(required step\)](#)

Company Information

Business Area: Functional Area: Company:
Field Team: Activity: General Location:
Issue Owner: Location Details: [Add Location...](#)

Investigation Information

Impact Description:
Action Taken:
Contributing Factors:
Type of Root Cause:
Root Cause Description:
Comments/Recommendations:
Corrective/Preventative Actions:
Investigated By:
Investigator:

Aspect

Agency Information

Agency	Reported Date	Agency Incident #	Location	Contact

Legislation and Enforcement

Status	Act	Act Section	Regulation	Regulation Section	Determination Date	Enforcement	Penalty (\$)

Action Plan(s)

Action Plan ID	APN Status	Assigned To	Target Date	Remind	Completion Date	Business Area

Attachments: 0 [Email others with Issue details...](#)



Genus RMT (EMS)

Company Information

- Business Area – select from drop-down list
 - Field Team – select from drop-down list
 - Functional Area – select from drop-down list
 - Activity – will vary depending on functional area, select from drop-down list
 - Issue Owner – select from drop-down list and e-mail will be sent to the assigned person
 - Company – select from drop-down list
 - General Location – enter brief description of the location relevant to the issue
 - Location Details – ensure that all turquoise fields are filled prior to clicking on **Add Location** button. This will bring up **Issue Location Details** Window
- Fill in the following fields:

Location Details

- Licence – select licence number from drop-down list
- Road/Structure - *click **Insert Record*** and fill in the following columns
 - Road – select from drop-down list
 - Description – max. 2000 characters
 - Sta. Start – manually enter Station
 - Sta. End – manually enter Station
 - At Stn Structure – select from drop-down list
- Block - *click **Insert Record*** and select from drop-down list

Road	Description	Stn Start	Stn End	At Stn Structure

- *Click **Save** and close window to go back to **Natural Event Issue Wizard – New Window***

Investigation Information

- Impact Description – enter brief description, max. 2000 characters
- Action Taken – enter brief description, max. 2000 characters
- Contributing Factors – enter brief description, max. 2000 characters
- Type of Root Cause – select from drop-down list
- Root Cause Description – enter a brief description, max. 2000 characters
- Comments/Recommendations
- Corrective/Preventative Actions – enter a brief description, max 2000 characters
- Investigated By – select from drop-down list, if additional required, *click **Insert Record*** and select from drop-down list, repeat if necessary



Genus RMT (EMS)

Aspect

- Select from drop-down list
- For additional aspects – **click Insert Record** and select from drop-down list

Agency Information

- **Click Insert Record** and fill in the following columns:
 - Agency – select from drop-down list
 - Reported Date – select from calendar
 - Agency Incident # - enter incident number
 - Location – select from drop-down list
 - Contact – enter description of contact person

Legislation and Enforcement * (Note this section will likely be not applicable)

- **Click Insert Record** and fill in the following columns:
 - Status – select from drop-down list
 - Act – select from drop-down list
 - Act Section – enter information
 - Regulation – select from drop-down list
 - Regulation Section – manually enter information
 - Determination Date – click to open calendar and select date
 - Enforcement – enter information
 - Penalty (\$) – enter \$ amount

Action Plan(s)

- **Click Insert Record** and **click on** **APN** button to bring up **Action Plan Form** Window **or** manually fill in the columns.

Note: When requirement is manually filled in this will NOT e-mail recipient the action plan

- Otherwise, proceed to Step 3 in [CREATING NEW ACTION PLAN](#) (p.16) section for instructions.

E-mail

- **Click on E-mail others with Issue details...** button to bring up **Issue E-mail Notification** Window
- **Click Insert Record** and select recipient name from drop-down list
- **Click Email Now** button to send Issue details to recipient

Issue Attachments

- Proceed to [Step 4](#) for instructions

Click on link to proceed back to: [PREWORK-New](#) (p.10), [INSPECTION-New](#) (p.21)



Genus RMT (EMS)

PUBLIC/CLIENT ISSUE WIZARD – New Window

Fill in the following fields:

Report Information

- Issue Type – accept default
- Is this a spill? – select from drop-down list
- Issue Description – *click* on button to bring up Issue Description Window – max.2000 characters and click ☒ to save and close window. **If** more space required, must create a word document and add as attachment
- Issue Status – select from drop-down list
- Issue Source – select from drop-down list
- Issue Source Contact - enter name of person associated with the issue
- Occurrence Date – *click* on [...] to bring up calendar and select date



Genus RMT (EMS)

Company Information

- Business Area – select from drop-down list
- Field Team – select from drop-down list
- Functional Area – select from drop-down list
- Activity – will vary depending on functional area, select from drop-down list
- Issue Owner – select from drop-down list and e-mail will be sent to the assigned person
- Company – select from drop-down list
- General Location – enter brief description of the location relevant to the issue
- Location Details – ensure that all turquoise fields are filled prior to clicking on **Add Location** button. This will bring up **Issue Location Details** Window
Fill in the following fields:

Location Details

- Licence – select licence number from drop-down list
- Road/Structure - *click **Insert Record*** and fill in the following columns
 - Road – select from drop-down list
 - Description – max. 2000 characters
 - Sta. Start – manually enter Station
 - Sta. End – manually enter Station
 - At Stn Structure – select from drop-down list
- Block - *click **Insert Record*** and select from drop-down list

Road	Description	Stn Start	Stn End	At Stn Structure

- Click **Save** and close window to go back to **Public/Client Issue Wizard – New Window**

Investigation Information

- Contributing Factors – enter brief description, max. 2000 characters
- Type of Root Cause – select from drop-down list
- Root Cause Description – enter a brief description, max. 2000 characters
- Comments/Recommendations
Corrective/Preventative Actions – enter a brief description, max 2000 characters
- Investigated By – select from drop-down list, if additional required, *click **Insert Record*** and select from drop-down list, repeat if necessary



Genus RMT (EMS)

Conformance Information

- Code – select from drop-down list

Action Plan(s)

- Click **Insert Record** and click on **APN** button to bring up **Action Plan Form** Window or manually fill in the columns.

Note: When requirement is manually filled in this will NOT e-mail recipient the action plan

- Otherwise, proceed to Step 3 in [CREATING NEW ACTION PLAN](#) (p.16) section for instructions.

E-mail

- Click on **E-mail others with Issue details...** button to bring up **Issue E-mail Notification** Window
- Click **Insert Record** and select recipient name from drop-down list
- Click **Email Now** button to send Issue details to recipient

Recipient(s)	Notify Date
AMY BEETHAM	2004/01/19
ANGELA BONO	
BARB DRENNAN	
BILL GEISLER	
BILLY HOSKIN	
BRENDA DRUMMOND	
BRIAN T QUINN	
DARRELL LISSELL	
DEBBIE RIEHL	
DEIDRE HAIGHT	
DON HUDSON	
DOUG GRANT	
DUNCAN TAGGART	
GLENN PIGGOT	

Issue Attachments

- Proceed to [Step 4](#) for instructions

Click on link to proceed back to: [PREWORK-New](#) (p.10), [INSPECTION-New](#) (p.21)



Genus RMT (EMS)

OTHERS ISSUE WIZARD – New Window

Fill in the following fields:

Report Information

- Issue Type – accept default
- Is this a spill? – select from drop-down list
- Issue Description – *click* on button to bring up Issue Description Window – max.2000 characters and click to save and close window. **If** more space required, must create a word document and add as attachment
- Issue Status – select from drop-down list
- Issue Source – select from drop-down list
- Issue Source Contact - enter name of person associated with the issue
- Occurrence Date – *click* on to bring up calendar and select date



BCTS
BC Timber Sales
Chinook

'GENUS' Standard Operating Procedure 04/05/04

Genus RMT (EMS)

Company Information

- Business Area – select from drop-down list
- Field Team – select from drop-down list
- Functional Area – select from drop-down list
- Activity – will vary depending on functional area, select from drop-down list
- Issue Owner – select from drop-down list and e-mail will be sent to the assigned person
- Company – select from drop-down list
- General Location – enter brief description of the location relevant to the issue
- Location Details – ensure that all turquoise fields are filled prior to clicking on **Add Location** button. This will bring up **Issue Location Details** Window
Fill in the following fields:

Location Details

- Licence – select licence number from drop-down list
- Road/Structure - *click **Insert Record*** and fill in the following columns
 - Road – select from drop-down list
 - Description – max. 2000 characters
 - Sta. Start – manually enter Station
 - Sta. End – manually enter Station
 - At Stn Structure – select from drop-down list
- Block - *click **Insert Record*** and select from drop-down list

Road	Description	Stn Start	Stn End	At Stn Structure

- Click **Save** and close window to go back to **Others Issue Wizard – New Window**

Investigation Information

- Impact Description – enter brief description, max. 2000 characters
- Action Taken – enter brief description, max. 2000 characters
- Contributing Factors – enter brief description, max. 2000 characters
- Type of Root Cause – select from drop-down list
- Root Cause Description – enter a brief description, max. 2000 characters
- Comments/Recommendations
- Corrective/Preventative Actions – enter a brief description, max 2000 characters
- Investigated By – select from drop-down list, if additional required, *click **Insert Record*** and select from drop-down list, repeat if necessary



Genus RMT (EMS)

Aspect

- Select from drop-down list
- For additional aspects – *click* Insert Record and select from drop-down list

Agency Information

- *Click* Insert Record and fill in the following columns:
 - Agency – select from drop-down list
 - Reported Date – select from calendar
 - Agency Incident # - enter incident number
 - Location – select from drop-down list
 - Contact – enter description of contact person

Legislation and Enforcement

- *Click* Insert Record and fill in the following columns:
 - Status – select from drop-down list
 - Act – select from drop-down list
 - Act Section – enter information
 - Regulation – select from drop-down list
 - Regulation Section – manually enter information
 - Determination Date – click to open calendar and select date
 - Enforcement – enter information
 - Penalty (\$) – enter \$ amount

Action Plan(s)

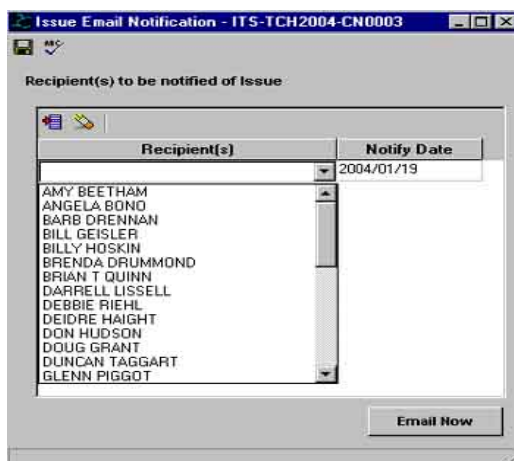
- *Click* **Insert Record** and *click* on **APN** button to bring up **Action Plan Form** Window **or** manually fill in the columns.

Note: When requirement is manually filled in this will NOT e-mail recipient the action plan

- Otherwise, proceed to Step 3 in [CREATING NEW ACTION PLAN](#) (p.16) section for instructions.

E-mail

- *Click* on **E-mail others with Issue details...** button to bring up **Issue E-mail Notification** Window
- *Click* **Insert Record** and select recipient name from drop-down list
- *Click* **Email Now** button to send Issue details to recipient



Issue Attachments

- Proceed to [Step 4](#) for

Click on link to proceed back to: [PREWORK-New](#) (p.10), [INSPECTION-New](#) (p.21)



Genus RMT (EMS)

4. In Genus Environment Window

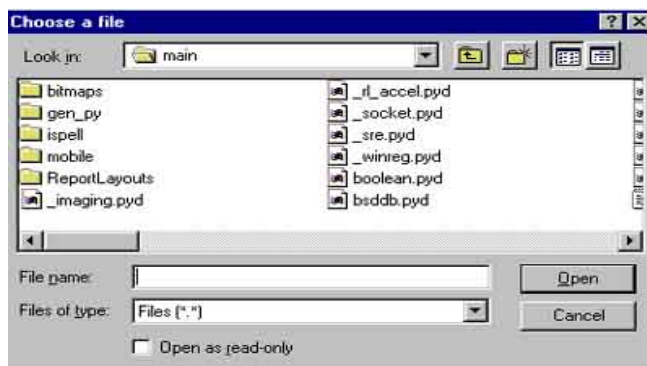
- Click Refresh to update Genus Environment window

Issue Attachments

- Locate and expand appropriate **ITS Issue** Folder
- Double-click on the selected **Issue Id** to display subfolders and select **Attachment** folder
- Click **Insert Record**
or Right-click **Attachment** folder and select **New Attachment** to bring up **Choose a file** window



- Select file to attach and click **Open** button to save attachment
- This will update and refresh Genus Environment Window



Note: Attachment folder has a counter to display the number of attachments to the specific Issue. In order to open an attachment, the file can only be accessed from the **Data Panel**.

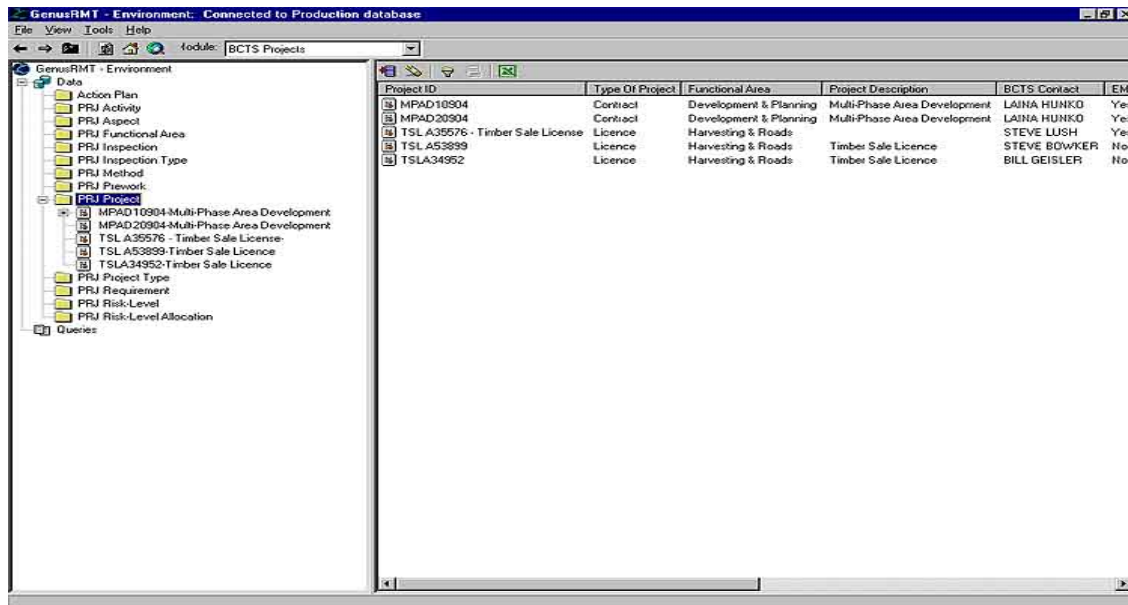
Click on link to proceed back to: [PREWORK-New](#) (p.10)
[INSPECTION-New](#) (p.21), [CONFORMANCE ISSUE](#) (p.30), [COMPLIANCE ISSUE](#) (p.33),
[NATURAL EVENT ISSUE](#) (p.37), [PUBLIC/CLIENT ISSUE](#) (p.40), [OTHER ISSUE](#) (p.43)



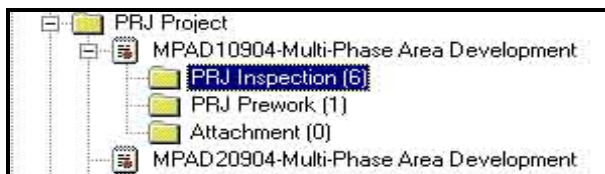
Genus RMT (EMS)

EDIT/VIEW ISSUES (ITS)

1. In Genus Environment Window
Select **BCTS All** from Module drop-down list
Expand **Data** directory in Navigator Tree and locate **PRJ Project** folder



- Double-click on **PRJ Project** folder to expand list of projects
- Double-click again on desired project to display subfolders



- Click on **PRJ Prework** or **PRJ Inspection** subfolder to expand list of records
- Double-click on desired record to display subfolders and display record in **Data Panel**



- Right-click on desired Inspection from **Data Panel** and select **Edit - Inspection Form**
- This will open the **Inspection Form** Window for editing

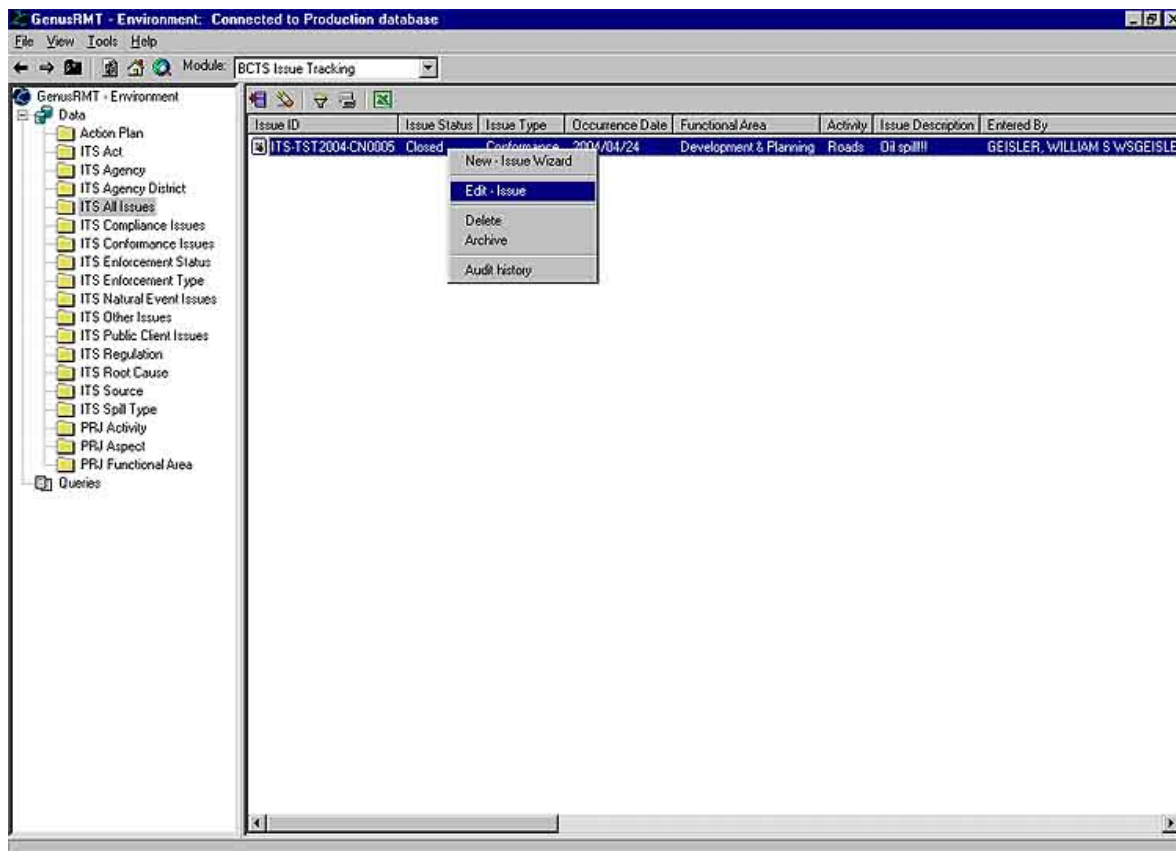


Genus RMT (EMS)

Alternatively:

Select **BCTS Issue Tracking** from Module drop-down list

- Double-click **Data** directory in Navigator Tree and locate **ITS All Issues** folder or **Specific Issues** folder
- Click on specific **ITS** folder to display a list of existing Issues in the **Data Panel**
- Right-click on appropriate record in the **Data Panel** and select **Edit Issue**
- This will open the **Issue Wizard Window** for editing



3. Issue Wizard Window

- Make the appropriate changes to issue form
- Click **Save** to update and close window

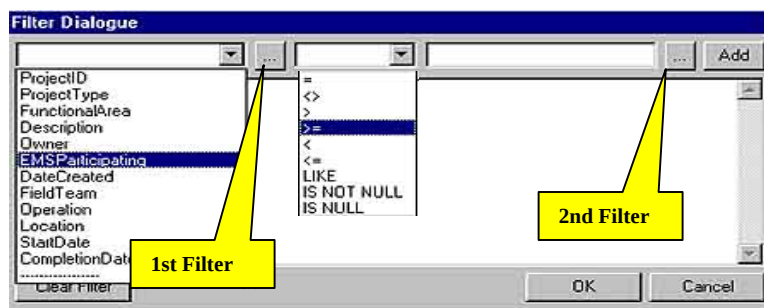


Genus RMT (EMS)

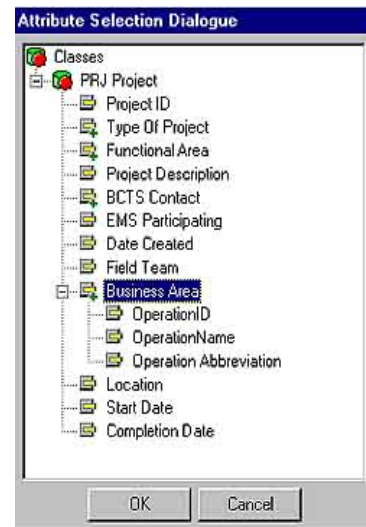
NOTE: You must set a new filter requirement for each time a **New** folder is accessed but will only need to be set once when working within the same session. The filter will reset only when new module is selected or when a new session begins.

SET FILTER

1. In Genus Environment Window
 - Select a **Folder** in Navigator Tree to set filter
 - Click on **Filter** button and this will open the **Filter Dialogue** box



2. Filter Dialogue Box
 - Select a data field from the first drop-down list to filter (i.e. Project ID, FunctionalArea, Operation etc.)
 - **or**
 - To set a more specific data filter
 - Click on 1st [...] button to open **Attribute Selection Dialogue** Box
 - Select and expand directory as necessary to set data field filter
 - Click **OK**
 - Next, Select condition from second drop-down list (i.e. = equal to, <> not equal to, > greater than)
 - Click on 2nd [...] button to open **Please choose a value** Box



- Select Value and click **OK**
- Now click **Add** button to set condition and click **OK** to accept
- This will refresh Genus Environment Window and display only the filtered data records
- **Repeat** as required for other folders

Click on link to proceed back to : [PROJECT-New](#) (p.2), [PROJECT-Edit](#) (p.6), [PREWORK-New](#) (p.7), [PREWORK-Edit](#) (p.14), [ACTION PLAN-New](#) (p.15), [ACTION PLAN-Edit](#) (p.18), [ITS-New](#) (p.26)

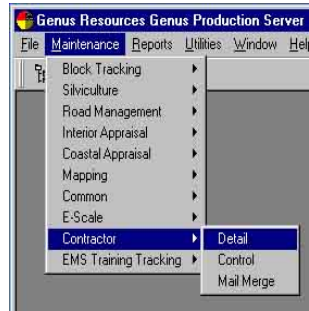


Genus RMT (EMS)

***NOTE:** Please log on to **GENUS RESOURCE** application before proceeding. Only users with Administrative privileges may obtain access into the maintenance tables. Please consult your local administrator for additional information.

APPENDIX A – Setting a contractor (=LPC) to EMS Approved

1. In Genus Resource Window
 - Select **Maintenance** drop-down list
 - Next, select **Contractor** and select **Detail**
 - This will bring up **Contractor Detail** Window



2. Contractor Detail Window
Fill in the following to query:

Division – select Business Area (i.e. Chinook)

Name – to minimize query time, type in partial **Name** of contractor and add * (asterisks) to the end
(i.e. Pacific* = Pacific Aqua Foods Ltd
Talka* = Talka Track & Timber Ltd)

- Now, *click* on **Query** button and wait for the **Contractor Name** table to populate
- Next, select company to populate tabs: *Detail, Location, Contact, Comment, Activity, Approval*
- Select **Approval Tab** and *click* on **Division** Box (will highlight in blue)
- *Click* **Insert Record** to populate right gray box: **Approval Details**
- Next, *click* **EMS Contractor** box and **Approved** box (X)
- Select **Active** from **Status Code** drop-down list
- *Click* **Save**