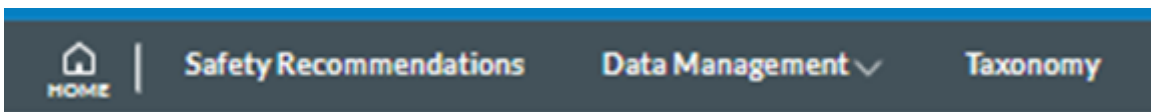


3. Safety Recommendations

Safety Recommendation (SR): Safety recommendations derived from investigations are issued by accident investigation authorities to prevent accidents and incidents.

The system recognises the Officer's landing page when the Officer logs in to the E2 Web Application. See section Home (Landing page) for further details.

The Officer uses the Safety Recommendation menu on the upper left side to manage Safety Recommendations.



The Safety Recommendation menu stores the Safety Recommendations (SRs) issued by the SIAs (Safety Investigation Authorities).

Safety Recommendations Versioning

The version of an SR is indicated by two figures, separated by a dot:

- Draft Version:
 - ü Format: It is always represented as 0.0, regardless of the previous and next version.
 - ü Visibility: It can only be seen by the user currently editing the SR.
- Minor version:
 - ü Format (e.g. 5.1)
 - o It is determined by the digits after the dot.
 - o It always has a 1-9 after the dot
 - ü Visibility: It can only be seen by users who belong to the SR's responsible Entity (Authority)
- Major version:
 - ü Format (e.g. 5.0)

- o It is determined by the digits before the dot.
- o It always has a 0 after the dot

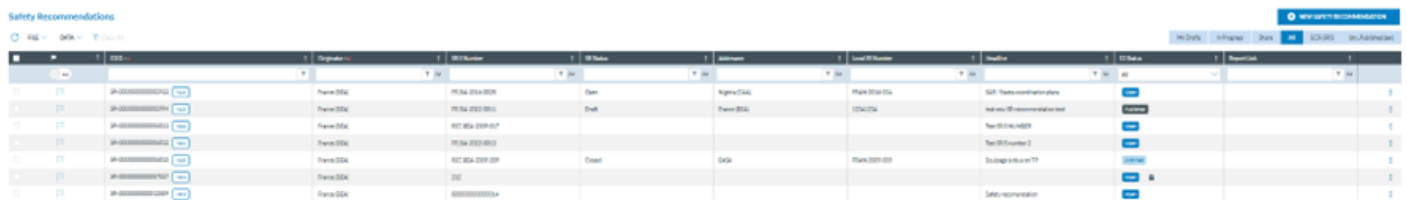
ü Visibility: If a SR is shared, this version can be seen by other Authorities

Safety Recommendations can be saved as drafts, minor, or major versions.

Only major versions can be shared with other Authorities.

3.1. Management of SRs

To access SRs, Officers can click on Safety Recommendations in the navigation menu, and the system will display the list of SRs:

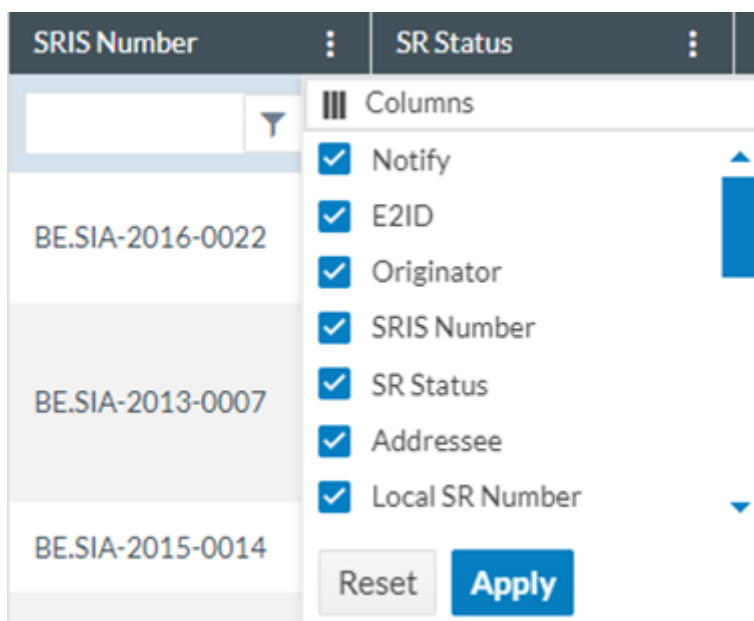


The screenshot shows a table titled "Safety Recommendations" with columns: ID, SRIS Number, Status, Originator, Addressee, Local SR Number, and Actions. The table contains several rows of data, each representing a safety recommendation. The "Status" column shows values like "Open", "Draft", and "Closed". The "Originator" and "Addressee" columns show names like "Nigeria (SAR)" and "Pawel (SAR)". The "Local SR Number" column shows values like "SRIS-2016-0022" and "SRIS-2013-0007". The "Actions" column contains buttons for "View", "Edit", and "Delete".

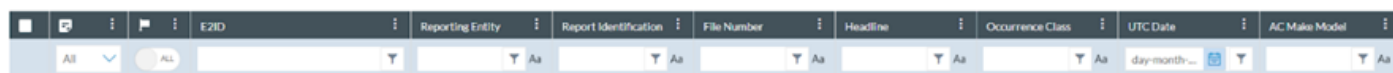
The SRs list is divided into columns. Each column refers to an attribute/metadata field of the SR. The columns are set by default. Each row of the SR list is clickable.

The Officer can alter the position of each column by dragging and dropping them.

Next to the title of each column, there is 3 points menu through which the Officer can filter the columns to be displayed:



Below each column, there is a drop-down menu through which the Officer can filter the data for the specific column:

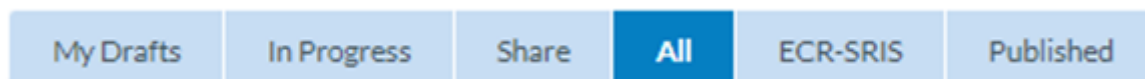


This drop-down menu will display operators according to the attribute or field type. Additionally, for text or alphanumeric columns, filtering can be case-sensitive **Aa**.

The My Account-Custom columns tab can also update the attributes and order. See the Custom columns section for further details on their update.

3.2. Status filters and status

Above the list of SRs, on the right side, the system displays the filter tabs:



The list of results will restrict the SRs based on the selected tab:

- **My Drafts:** refers to SRs the Officer is editing. The list of SRs will show 'Draft' on the 'E2 Status' column and cannot be edited by another Authority Officer.
- **In Progress:** refers to 'Open' SRs. The list of SRs will show 'Open' on the 'E2 Status' column, and if another Officer is editing the SR, it will show a 'padlock' icon.
- **Shared:** refers to SRs shared from the Officer's Authority to other Authorities and those shared from other Authorities with the Officer's Authority.
- **All:** refers to all the SRs belonging to the Officer's Authority regardless of status.
- **ECR-SRIS** refers to all SRs shared with the ECR-SRIS by all the Authorities belonging to the ECR.

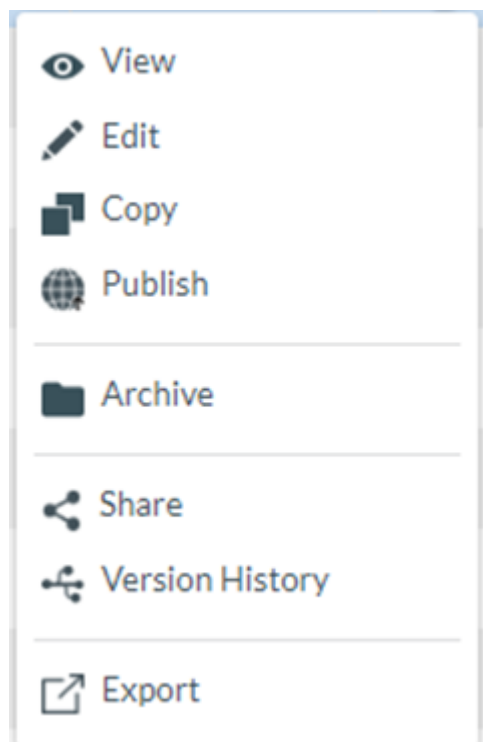
The **status** of the SRs can be the following:

- **Draft:** It is an SR saved as 'Draft' by the specific Officer. They can only be accessed by the Officer who is currently editing the report.
- **Open:** Any Officer of the Authority can edit an open SR.

- **Archived:** Officers can archive the list's SRs. Once archived, they can be restored to 'Open' or deleted.
- **Published:** The Officer published this SR, which will be visible on the SRIS2 Public portal.

3.3. 3-dot menu for an SR – SRs features

On the last section of each row, the system displays a 3-dot menu with different options depending on the status of the SR:



3.3.1. View

When clicking on 'View' in the 3-dot menu (or double-clicking in the list on any row), the system will display the content of the SR with the view the Officer has saved in 'My Account'. See Favourite Views section of My Account for further details.

Otherwise, the system displays a page where the Officer has to select the specific view:



Once a view is selected, the SR is opened in view mode.

SR-000000000000193 v1.0

[BACK TO LIST](#)
SR - FULL VIEW
[SHARE](#)
[PUBLISH](#)
[ACTIONS](#)

Read Mode

BE.SIA-2016-0022

Recommendation Text
Addresssee
Occurrence
Attachments

RECOMMENDATION
GENERAL INFORMATION

Headline: Runway Incursion

SRIS number: BE.SIA-2016-0022
Local SR number: BE-2016-0022

SR status: Open

Publication format: Final report
Source reference: AAU-2016-21

Source type: Occurrence
SR topics: Procedures / Regulations > Aerodrome

Date issued: 27/03/2017
Closure date:
SRUR/SRGC:
☐ Global Concern (SRGC)
☐ Union-wide Relevance (SRUR)

The Officer can share the SR by clicking the ‘Share’ button as explained in the Share section or publish it by clicking the ‘Publish’ button described in the Publish section.

The ‘Actions’ button displays the following menu:

Edit
Copy

Archive

Version History
Export

3.3.2. Edit

This option is only available for ‘Open’ SRs belonging to the Officer’s Authority and not blocked. It is also available for ‘Published’ SRs. It is unavailable for those SRs shared with the Officer’s Authorities from other Authorities or the ECR-SRIS.

When the Officer clicks on the ‘Edit’ option of the 3-dot menu of the specific SR of the list of SRs, the system will display its content with the view the Officer has saved in ‘My Account’. See Favourite Views of My Account section for further details.

Otherwise, the system displays a page where the Officer has to select the specific view to open the SR:

HOME
Safety Recommendations
Data Management
Taxonomy

SR-00000000000011507 Draft

[BACK TO LIST](#)
Select a view
[DISCARD](#)
[MINOR](#)
[MAJOR](#)
[DRAFT](#)
[SAVE](#)

Officers have to select a view from this menu, and the system will display the 'Edit SR' page with the information of that SR:

The page works like the View page explained in the previous section, with the following differences:

- The fields are editable, and the SRIS number is mandatory, so it cannot be left empty.
- There is no 'Actions' button. Instead, the system provides the following buttons depending on the status of the SR:

ü For **Open SRs**:

- **Save**: to save the updates of the draft and keep on updating the SR.
- **Minor**: to save the SR as a minor version
- **Major**: to save the SR as a major version
- **Draft**: to save a draft version
- **Discard**: to delete the draft. It displays a confirmation message. If the Officer confirms the action, the system will return to the list of SRs, and the updates will be lost.

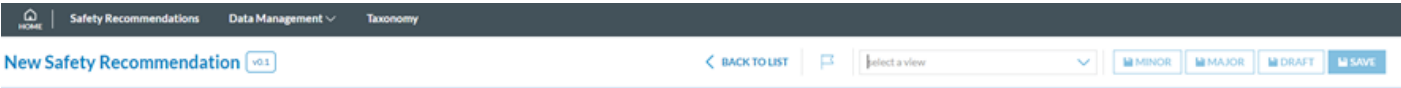
ü For **Published SRs**:

- **Save as Minor**: to save the SR as a minor version
- **Save as Major**: to save the SR as a major version

3.3.3. Copy

All SRs can be copied or duplicated except for blocked open SRs.

When the Officer clicks on the ‘Copy’ option of the 3-dot menu of the specific SR, the system will display the Copy SR page with the view the Officer has saved in ‘My Account’. See Favourite Views of My Account section for further details.



Otherwise, the system displays a page where the Officer has to select the specific view to open the copied SR:



This is similar to the editing page. The Officer can update the necessary fields, making sure to change the SRIS number, which cannot be repeated, and click on one of the saving options. See the previous sections for further details on the saving options for Open and Published SRs.

For Archived SRs, there will not be a discard button, and the saving options will be the following:

- **Save** button: to save the updates and keep on updating the SR.
- **Minor, Major and Draft** buttons: to save the specific versions and close the SR.

3.3.4. Share

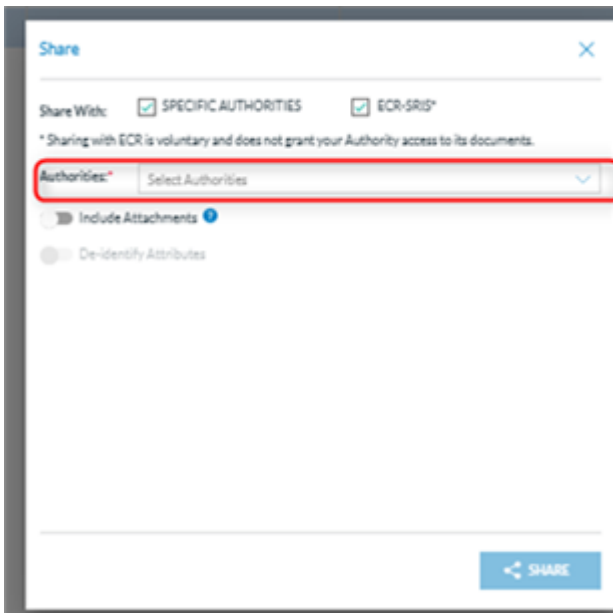
Only SRs saved as a **major** version can be shared with ECR. Officers have to click on the Share option of the 3-dot menu of the SR to be shared, and the system will display the Sharing window:



This window is also accessible through the 'Share' button when viewing the SR. See the [View](#) section for further details on this button.

Officers can check the ECR-SRIS checkbox and/or the 'Specific Authorities'.

If the 'Specific Authorities' checkbox is checked, the system will display the Authorities drop-down menu below:



In that case, officers must select the Authorities with whom they wish to share the SR.

The Authority can also indicate if attachments will be visible to other Authorities when sharing.

- The Authorities with which all the attachments can be shared are defined at the Authority level.
- The Officer can choose whether they want to share the attachments by enabling the toggle.

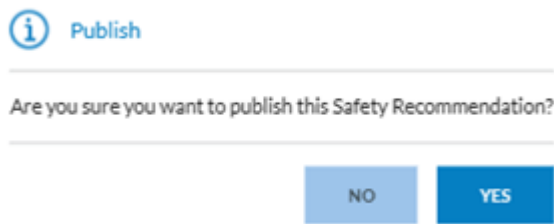
ü All the attachments will be shared with the Authorities previously selected in the Authority Settings option 'Sharing of Attachments' if enabled.

Once Officers click the 'Share' button, the SR will be shared with the selected Authorities and enabled to publish.

3.3.5. Publish

Only Open, major versions shared to ECR-SRIS and not blocked SRs can be published. It can be done either through the 'Publish' button displayed when viewing the SR (See View section for

further detail on this button) or through the 'Publish' option of the 3-dot menu of the specific SR at the list of SRs. Thus, Officers can click the 'Publish' button or option, and the system will display a confirmation message.



If Officers confirm the action, the system will publish the SR, and the E2 Status will turn to 'Published' for the specific SR in the list of SRs. Once published, the SR becomes visible in the SRIS2 Public portal.

3.3.6. Unpublish

Only published SRs can be unpublished. Officers can do it through the '**Unpublish**' option of the 3-dot menu of the published SRs of the list or through the '**Unpublish**' button displayed when viewing the SR (See View section for further detail on this button).

The system will display a confirmation message. If Officers confirm the action, the system will unpublish the SR, and its E2 Status will be updated accordingly in the list of SRs. Once unpublished, the SR is not visible in the SRIS2 Public portal.

3.3.7. Archive

Only Open (i.e. not blocked) SRs can be archived. Officers can click on the 'Archive' option of the 3-dot menu of the specific SR, and the system will display a message indicating that the SR has been archived. The list of SRs will be updated accordingly, and the E2 status of that SR will be 'Archived'.

3.3.8. Restore

Only Archived SRs can be restored. Officers can click on the 'Restore' option of the 3-dot menu of the specific archived SR, and the system will display a message indicating that the SR has been restored. The list of SRs will be updated accordingly, and the E2 Status of that SR will turn to 'Open'.

3.3.9. Delete

Only Archived SRs or Draft SRs can be deleted. Officers can click on the 'Delete' option of the 3-dot menu of the specific archived SR, and the system will display a message indicating that the SR has been successfully deleted. The list of SRs will be updated accordingly, and it will no longer include the deleted SR.

3.3.10. Version History

Officers can see the version history of all SRs. Officers have to click on the 'Version History' option of the 3-dot menu of the specific SR, and the system will display a modal view that shows all the changes that the SR has been through, including modification dates and users, as well as changes in the attributes, if edited.



Officers can also restrict the Changes through the Actions drop-down menu and filter the result only to the desired action/s (i.e. Edited), and the window will be updated accordingly.

Actions: All the Actions a document can go through are registered in the Version History with a different colour:

- Created
- Edited
- Inserted by BO
- Updated by BO
- Deleted by BO
- Automatic Update
- Regularised
- Validated
- Validated by BO
- Integrated
- Integrated by BO
- Draft
- Deleted
- Archived
- Restored
- Published
- Unpublished
- Shared
- Unshared
- Unshared by BO
- Shared with ECR by BO
- Shared with Authorities by BO
- Make Major Version
- Make Major Version by BO
- Make Major Version and Share with ECR by BO
- Make Major Version and Share with Authorities by BO
- Make Minor Version
- Removed Link
- Transfer Ownership
- Report To
- Copied Attribute by BO
- Moved Attribute by BO

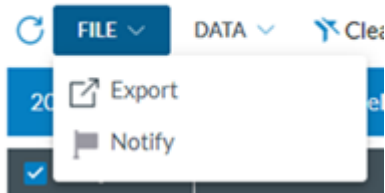
Together with each action, the Modification Date and the user account of the user who made the action are included. For some of the actions, such as 'Edit', a 'Show Changes' section is included, showing the attributes that were added, changed, or deleted.

3.3.11. Export

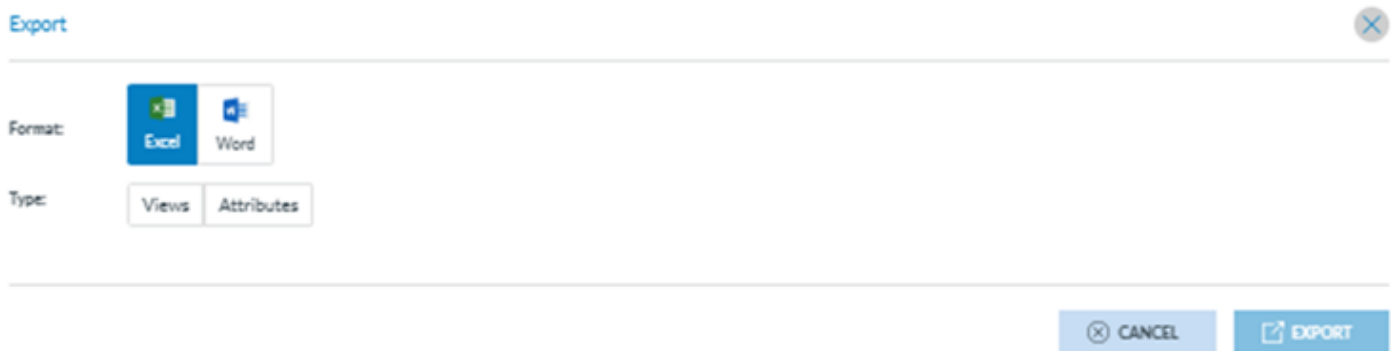
The Officer can export one or more SRs in different file formats.

- **To export one report:** This 3-dot menu option works for each SR of the list.
- **Export in bulk:** The export option can be performed by selecting multiple SRs on the list and clicking the File drop-down menu above the list of reports.

Safety Recommendation



The system displays the Export window once they select the specific SRs and click on Export. (The window is the same for individual exports):



Officers can export SRs to Word and Excel format.

- **Excel Format:** When it is selected, the system will display:

ü Views

A view is a template used to view the data; this export will take the same attribute selection in the same order as displayed in the view. The system displays the views drop-down menu with all the views available for the Officer, and they must select the specific view to export the SRs, i.e.:

Export ✕

Format:

Excel

Word

Type:

Views

Attributes

Views:

SR - FULL VIEW ✕ ▼

✕ CANCEL

EXPORT

Then, click on the 'Export' button. The system will send an email notification to the Officer with a link to the export file.

ü Attributes

When the Officer selects 'Attributes', the system will display the Attributes List drop-down menu and the 'New Attribute List' button:

Export ✕

Format:

Excel

Word

Type:

Views

Attributes

Attribute List:

select an item ▼

NEW ATTRIBUTE LIST

☐ Aggregate all the report information in one row

☐ Remove empty columns

✕ CANCEL

EXPORT

An Attribute List is an export profile available for the Officer, where they can save ex-port preferences. If no Attribute List item is available, the Officer can create one on the fly.

The Attribute Lists can also be created through the 'My Account' menu 'Export by Attribute' tab. See section Export by Attribute for details.

When the Officer clicks on 'New Attribute List', the system will display the Attributes List pop-up window:



Name:

☒ Metadata fields

SRIS

Available Attributes

1 1 1 1

Recommendation

- > All Attributes
- > Addressee
- > Attachments
- > Database History
- > Document reference
- > Modifications
- > Note
- > Occurrence
- > PlayvRank

Selected Attributes

The Officer has to fill in the Name field, which must be unique for each Attribute List. The metadata fields check is activated by default. The Officer can deactivate it so the metadata of the selected SRs will not be exported.

Below, the system displays the taxonomy tree, through which the Officer can navigate and select the specific attributes they want to be exported.

The arrows unfold the items contained under each Entity. See the Taxonomy browser section for further details on its navigation. The Officer can also write in the Filter field to find the specific attributes. The Officer then checks the specific one/s they need, and they will appear under the 'Selected Attributes' title, i.e.:

Edit Attribute List: Attributes for Exports

Name:

☒ Metadata fields

SRIS

Available Attributes

Recommendation

- All Attributes
- Addressee
- Attachments
- Database History
- Document reference
- Modifications
- Note
- Occurrence
- PiezevRark

Selected Attributes

- Recommendation
 - Headline
 - Local SR number
 - SRIS number
- Addressee
 - Addressee
 - Completion %
 - Response priority
 - Response status

The Officer has to click on 'Save', and the system will return to the Attributes List selection window:

Export ✕

Format: ☒ Excel ☐ Word

Type:

Attribute List:

☒ Aggregate all the report information in one row

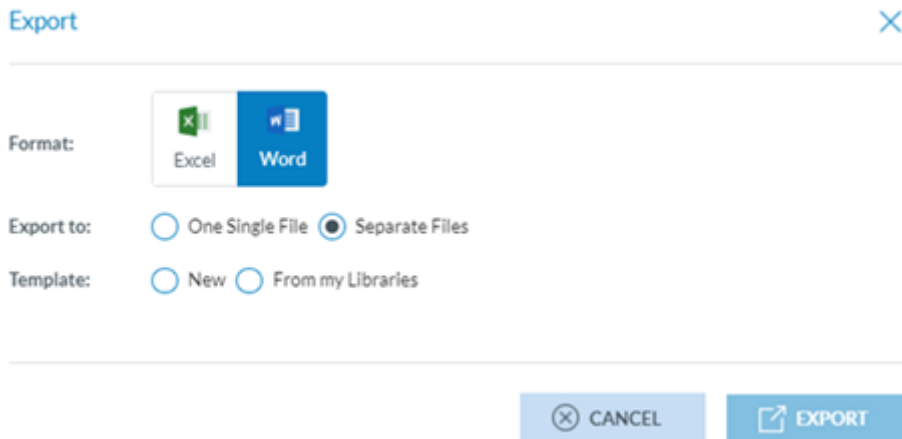
☐ Remove empty columns

The Officer must select the corresponding created 'Attribute List' from the drop-down menu and decide whether to 'Aggregate all the report information in one row' or 'Remove empty columns'. Then, the Officer clicks on 'Export', and the system will email the Officer's address to send the Excel file with the SR/s.

ü Word format

When exporting SRs to a Word format, the system picks the data in the SR and transforms it into a Word Template to generate ready-to-distribute documents.

When it is selected, the system will display:



The image shows a dialog box titled "Export" with a close button (X) in the top right corner. Below the title bar, there are three sections: "Format:", "Export to:", and "Template:". The "Format:" section has two buttons: "Excel" (with a green icon) and "Word" (with a blue icon and highlighted). The "Export to:" section has two radio buttons: "One Single File" and "Separate Files" (which is selected). The "Template:" section has two radio buttons: "New" and "From my Libraries". At the bottom right, there are two buttons: "CANCEL" (with a close icon) and "EXPORT" (with a document icon).

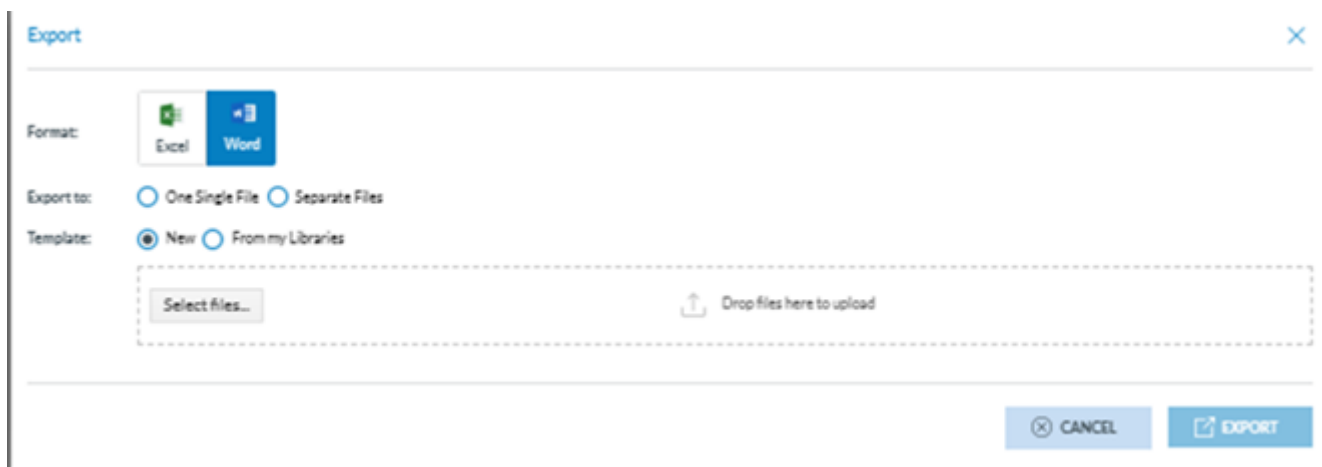
- o **Export to** radio button:

We present two alternative options: 'One Single File', if the Officer wants a compressed file containing one Word document for all the reports or 'Separate Files', if the Officer wants a compressed file containing one Word document per report.

- o **Template** radio button:

When the Officer selects 'New', the system will display a files section where the template can be uploaded through the 'Select files' button. The Officer can also drag the file/s and drop them in this section.

Officers can select 'From my Libraries' if a template is already available in the libraries available to the Officer.



The image shows the same "Export" dialog box as before, but with the "New" radio button selected under the "Template:" section. Below the "Template:" section, there is a dashed box containing a "Select files..." button and a "Drop files here to upload" area with an upload icon. At the bottom right, the "CANCEL" and "EXPORT" buttons are still present.

The Officer must upload the template file and click 'Export'. The system will email the Officer a download link when the export is ready.

From my Libraries: when the Officer clicks on this option, the system will display the Libraries pop-up window:

Export

Format:

Excel

Word

Export to:

One Single File

Separate Files

Template:

New

From my Libraries

My Personal Libraries

> Local Common Library

> Shared with me Libraries

CANCEL

EXPORT

The system will display below ‘My Personal Libraries’ with the tree of Libraries available to the Officer.

The Officer will unfold the libraries through the arrows, select the specific template, and click on ‘Export’. Then, the system will email the Officer’s address so that the Officer can send the Word file with the SRs.

Nonetheless, the creation of word templates is also managed through the Data Management menu, ‘Word Templates’. See section Create a Word Template for further details.

3.4. Creation of an SR from scratch

Once in the SRs list, the Officer can click on ‘New Safety Recommendation’ above the list of SRs:

Safety Recommendations										
NEW SAFETY RECOMMENDATION										
No Drafts In Progress Done 2/3 2/3 2/3 2/3										
		Originator	SR Number	SR Status	Address	Local SR Number	SR Title	SR Description	SR Status	SR Link
1	1	France BSA	FRSA-2014-002	Open	Nigeria (CA)	FRSA-2014-004	SR: Status coordination	SR: Status coordination	Open	
2	1	France BSA	FRSA-2012-011	Open	France BSA	12345678	SR: Status coordination	SR: Status coordination	Open	
3	1	France BSA	FRSA-2019-017	Open	France BSA	12345678	SR: Status coordination	SR: Status coordination	Open	
4	1	France BSA	FRSA-2019-013	Open	France BSA	12345678	SR: Status coordination	SR: Status coordination	Open	
5	1	France BSA	FRSA-2019-019	Open	France BSA	12345678	SR: Status coordination	SR: Status coordination	Open	
6	1	France BSA	FRSA-2019-019	Open	France BSA	12345678	SR: Status coordination	SR: Status coordination	Open	
7	1	France BSA	FRSA-2019-019	Open	France BSA	12345678	SR: Status coordination	SR: Status coordination	Open	
8	1	France BSA	FRSA-2019-019	Open	France BSA	12345678	SR: Status coordination	SR: Status coordination	Open	
9	1	France BSA	FRSA-2019-019	Open	France BSA	12345678	SR: Status coordination	SR: Status coordination	Open	
10	1	France BSA	FRSA-2019-019	Open	France BSA	12345678	SR: Status coordination	SR: Status coordination	Open	

The system will display the view the Officer has previously defined through ‘My Account’. See Favourite Views of My Account section for further details, i.e.:

New Safety Recommendation

BACK TO LIST SR - FULL VIEW MINOR MAJOR DRAFT SAVE

Read Mode Show all TC-2024-0000000000002605

RECOMMENDATION

ADD SUBENTITY

GENERAL INFORMATION

Headline:

SRIS number: TC-2024-0000000000002605 Local SR number:

SR status:

Publication format:

Source type:

SR topics:

Date issued: Closure date: SRUR/SRGC: Global Concern (SRGC) Union-wide Relevance (SRUR)

If no View had been previously defined on ‘My Account’, the Officer has to select one on the ‘View’ drop-down menu. The Officers have to fill in at least the mandatory fields. The management of this form is like the editing page. See the [Edit](#) section for further details.

3.5. Data Menu – Re-execution of Queries

This menu concerns the execution of existing queries the Officer has available. See [Queries](#) for details on their creation and management.

Next to the File menu, above the list of SRs, the system displays the **Data** menu:

Safety Recommendations

FILE DATA Clear All

Data Refresh Query

Data Select Query

Data Clear Results

Data select Query: This button displays a modal window with the libraries available to the Officer to choose a query:

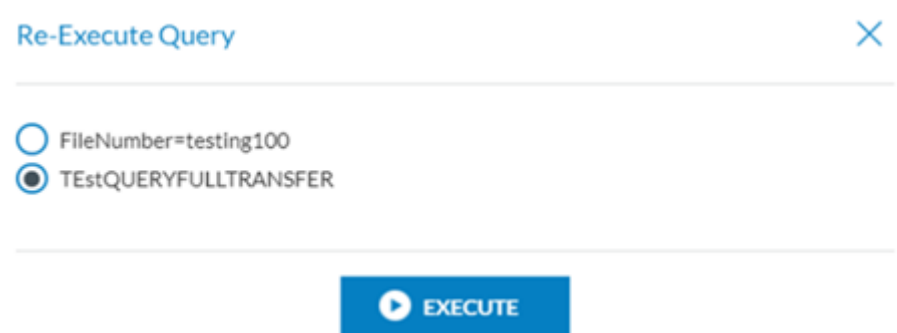


The Officer has to navigate the available libraries, select a query, and click 'Execute'.

The system will update the list of SRs based on the query conditions.

The last 10 queries executed through this button will be available through the 'Data Refresh Query' option.

Data Refresh Query: When the Officer has selected queries through the 'Data Select Query', as explained above, the system will show them in the Re-Execute Query window where the Officer will select a specific query and will click on 'Execute':



The system will execute the query and update the results list based on the selected query.

Data Clear Results: This button deletes the application of the queries in the list of results. When the Officer clicks on it, the system updates the list of SRs, removing all the filters and presenting all the results.



Refresh icon: to refresh the page.