



# TES Boat Docs Audit Matrix

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## Synopsis:

TES provides a very simple matrix to check the audit status of boat docs in an Event or Series or Race, in the case of an offshore race.

## Prerequisites:

Users require a TES administrators' Login

## Scope of the Audit

TES allows owners to attach a number of documents to their boat as "Boat Docs".

These may include but not limited to:

- a boat photo,
- an insurance cert,
- a life raft cert

Routinely, it is unlikely the document content will change in the foreseeable future.

If it does change, a replacement document can be uploaded.

TES also provides "Race Docs". These apply to a **specific** offshore race e.g. name of skipper, 2IC, navigator; crew list for this race.


Currently the Audit system does not apply to Race Docs.

In many circumstances it is possible to use Boat Docs as quasi Race Docs by for example, requiring a new crew list be uploaded for the next race with the "OK" check box to be reset shortly after the previous race.

For club racing once a document has been audited for one Series, then that Audit is available for any other *Series in that Event*.

The document list is set by TopYacht staff at event set-up time

## Access:

From the Main Menu, select the **event**, and then click on the  icon for the series.

Melbourne to Geelong Passage Race 2021

Event Data                      Utils                      Hcer Menu                      Off St

Currently there are 139 competitors entered for this event.

ENTRANTS	EDIT	Ent Paid	Cas Paid	Check List	EMAIL	SMS	Bt Docs	Bt Re
139 (cas 0/0)		\$	\$					
0 (cas 0/0)		\$						
0 (cas 0/0)								
0 (cas 0/0)								

**Details:**

BOAT NAME	SAIL NO	aud cat 3	aud cat 5	aud cat 7	bt image	bt ins	bt photo
<input type="text" value="search"/>	<input type="text" value="search"/>	<input type="text" value="search"/>	<input type="text" value="search"/>	<input type="text" value="search"/>	<input type="text" value="search"/>	<input type="text" value="search"/>	<input type="text" value="search"/>
ANOTHER TEST	TEST04 ~ id:1481						
BLACK MAGIC	TEST03 ~ id:1792						

The left most column is a list of boats entered in selected series. There **may** be a horizontal scroll bar if the number of required documents exceeds the available screen width.

Across the top is a list of Boat Docs required for the Series (Race in the case of offshore racing).

Each cell contains an icon.

Clicking on the icon opens the document for that boat. Example: A boat Insurance certificate.

At the same time, it opens an "Audit Edit" window as below.

Audit Edit - Google Chrome

topyacht.com.au/db/kb2/auditEdit.php?ref=aud-aud\_cat\_7-16&rm=0.03210

**BLACK MAGIC TEST03 Adam Black**

**Document** aud\_cat\_7

**Status** ok

**Uploaded** 2018-08-08 22:48:17

**Expiry**

**Previous audit date** 2021-09-05 12:22:51

**OK?**

**Auditor(s)**

**Notes**

**UPLOAD FILE**






The Audit Edit displays


- the boat name and sail number
- the document being Audited
- the status as of the previous/last audit
- when the document was uploaded
- the expiry date as entered by the last person to audit the document (not the boat owner)
- the date of the previous/last audit

The auditor(s) can

- update the expiry date (needed when a new document has been uploaded)
- tick or untick the “OK” check box
- initial the audit
- add relevant notes
- upload a replacement document

### The Icons and Their Meaning:

	No file (document) has ever been uploaded for this boat.
	This is a NEW or REPLACED document that needs verifying <sup>1</sup> .
	This document has expired. I.e. the today's date is ON or AFTER the “Expiry Date” entered at the previous Audit.
	The Expiry Date, entered at the previous Audit will be reach in the next 30 days (or less).
	The document has not expired AND has been verified as OK.

Note: the “OK”  check-box is automatically unchecked if

- the document has reached it expiry date
- the document will expire in the next 30 days or less

### Offshore Racing uses a “Series” as a Race.

In this case the Audit is available to all Races within the event.

*For both club racing and offshore racing, The Audit system can dramatically speed up the Audit process for the next sequential Series/Offshore Race.*

At the start of a new Season TopYacht will provide an option to transfer forward the Audit data from the previous Season if desired.

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<sup>1</sup> This occurs the first time a document is upload, OR, if a document is replacement after the last Audit, OR if the boat enters **another** Event.

## **Associated Documents**

[Uploading Documents to TES from an Android Device](#)

[Uploading Documents to TES from an Apple Device](#)

[TES ~ New Event Setup Guidelines](#)

## **Document Revision**

Rev 2022-01-12, 2021-09-29, 2021-09-28